

Best Effort.

The weekday briefing on Australian telecommunications, data centres and AI infrastructure.

TODAY'S BRIEFING

Saturday 24 October 2026

- Power is the constraint shaping Australian data centre plans.
- A Bloomberg review found fewer than a quarter of more than 40 large Sydney and Melbourne projects have publicly confirmed electricity or a grid link, while Victoria's action plan expects new facilities to back their load with new renewables and storage.
- In Wagga Wagga, IREN's proposed 900 MW campus adds to resident unease over CDC's separate \$15 billion proposal.
- Nbn co. and Victoria will fund a \$133 million fibre upgrade for 19,000 premises.

12 stories · 22 min reading · 21 sources · Online at besteffort.au/editions/2026-10-24

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Only 23% of Sydney and Melbourne data centre projects confirm power, Bloomberg finds

A Bloomberg review found fewer than a quarter of more than 40 large data centre projects around Sydney and Melbourne have publicly confirmed electricity or a grid link. The projects carry more than A\$100 billion of planned investment and face grid limits and resident opposition.

Best Effort desk · Sat 24 Oct 2026 · 2 sources · 3 min read

WHY IT MATTERS

For operators, lenders and carriers supplying fibre to campuses, the data points to power and local approval, rather than land or demand, as the limit on Australian capacity, and to a pipeline that may deliver well below its headline size.

Fewer than one in four large data centre projects planned or being built around Sydney and Melbourne has publicly confirmed a secured power supply or grid connection, according to a Bloomberg review of company disclosures published on 23 October 2026. The 40-plus projects carry more than A\$100 billion (US\$70 billion) of projected investment, and Bloomberg read the missing confirmations as a sign of setbacks and possible delays.

Seven of 28 active Sydney projects have confirmed power, against three of 15 in Melbourne. Bloomberg approached 25 developers to check their public disclosures. GreenSquare declined to comment on its power arrangements but said it was working with authorities and infrastructure partners. CDC Data Centres said it had delivery plans for every site under construction, with power timelines as expected. Nine others declined to comment or did not directly answer, and the remainder did not respond. Tech Insider cautioned that the review measures public confirmation rather than physical reality, because commercial power agreements often stay private until a project is financed.

The constraint is sharpest in Sydney, where Transgrid said in August that the city cannot connect any of the 20 gigawatts of inquiries it has received from large new power users. Transgrid said half of that demand sits within 12 kilometres of its Sydney West substation, a load it compared with the winter peak of the whole of New South Wales.

Friction is already costing money. Bloomberg reported that NextDC cut its profit forecast in the week of the article after Melbourne residents blocked the installation of towering transmission lines, and that its share value almost halved. In Sydney, Goodman Group dropped its A\$1.2 billion Project Mars last

month; the 90-megawatt facility would have stood about 20 metres from the nearest home and 160 metres from a public school, and drew hundreds of objections. Residents living near NextDC's West Footscray facility, some about 15 metres away, told a parliamentary inquiry last month they wanted compensation for noise, pollution and potential fire risks.

Official data is also starting to show the gap between announcements and delivery. The Australian Energy Market Operator found that over a third of proposed data centres seeking main-grid access were cancelled last year. BloombergNEF counts more than 20 gigawatts in announced and early-stage projects against an operating fleet of 1.5 gigawatts. BNEF analyst Tushna Mehta said, "Data center capacity is being built much faster than the new generation needed to supply it." Morgans Financial analyst Nick Harris wrote that "Social license for Australian data centers is becoming an increasingly significant headwind", adding that investors fear further delays.

Australia has more than 160 operating data centres, mostly in Sydney and Melbourne, which use about 2 per cent of the electricity supplied by the country's grids. AEMO has projected that share could grow by a quarter each year, to roughly 6 per cent by 2030 and 13 per cent by 2036. Industry-commissioned analysis puts annual water use at about 5.5 gigalitres, roughly 0.04 per cent of national consumption, though local effects could be much larger where projects cluster in drought-stressed growth corridors. University of Technology Sydney researcher Bronwyn Cumbo said public resistance to AI is rising and that many facilities are planned near homes, schools, farmland and natural areas.

Bloomberg said these hurdles raise questions about the government's push to make Australia a regional hub while courting investors and seeking to streamline approvals. Building further from the major cities could help, but would need heavy investment in new transmission lines and telecommunications.

REPORTING FROM

- 1 **Tech Insider** · AI Data Centres Australia: Only 23% Have Power [2026]
- 2 **Business Standard** · AI data centre backlash threatens Australia's \$70 billion investment boom

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

Wagga residents balk as IREN plans 900 MW data centre alongside CDC proposal

IREN has proposed a 900 megawatt data centre worth more than \$10 billion at Gregadoo near Wagga Wagga, as residents react to CDC's separate \$15 billion, 1.4 gigawatt campus. Around 120 people attended a community meeting, and Wagga Council has voted to negotiate a land sale to CDC.

Best Effort desk · Sat 24 Oct 2026 · 3 sources · 2 min read

WHY IT MATTERS

Two large proposals in one regional suburb, with Blockspace Media pointing to competition for electricity, test local grid capacity, planning processes and community acceptance, which will influence how quickly big data centre and AI campuses can proceed in regional New South Wales.

IREN has proposed a 900 megawatt data centre worth more than \$10 billion on Redbank Road in Gregadoo, a suburb of Wagga Wagga, making it the second large facility planned there. The other is a \$15 billion campus from Canberra Data Centres (CDC), which could require up to 1.4 gigawatts of electricity. Around 120 people turned up to a community meeting at the Boat Club to discuss the projects.

The CDC plan has four buildings on a 104-hectare site near the Gregadoo Waste Management Centre, with 189,000 square metres of floor space. IREN says it is founded in Australia and listed on the Nasdaq, and describes its project as in early planning, west of the same waste centre. Blockspace Media reported that the investment could be spread over six to eight years and that the site is not part of IREN's existing 5 GW secured-power portfolio. The outlet listed grid access, environmental permitting, financing and finding customers as obstacles, and pointed to competition for electricity with CDC.

Resident Rachael Cornius-Randall said the suburb was being turned from a rural and residential area into an industrial energy and data precinct. "We feel we're being sacrificed for development, while outsiders make all the decisions," she said. She also said the data centres would sit too close to homes and Lake Albert Public School. The CDC proposal has already led to petitions and worries about noise, fire risk, water use and strain on the grid.

Former Museum of the Riverina manager Luke Grealy said residents were struggling to take in the scale and pace of the proposals. "Those amounts are chicken feed compared to the scale of what's planned," Grealy said of CDC's community benefits offer. He described the meeting as calm, with residents

looking for answers rather than simply opposing development.

CDC chief executive Greg Boorer has called the project a "once-in-a-generation opportunity" for Wagga and the Riverina. CDC says it would generate about 1500 construction jobs and at least 200 permanent roles, and that its closed-loop cooling would need only an initial fill of up to 250,000 litres of rainwater. It has put forward a community benefits package worth up to \$225 million and promised to fund required grid connection changes. IREN says its project would create more than 500 construction jobs and more than 200 ongoing jobs, and that it expects to pay Wagga Wagga City Council more than \$200 million over 30 years. IREN also said it would use closed-loop cooling and plans to contract new generation and storage to cover its power use.

Wagga Council voted at its most recent meeting to let its general manager negotiate the sale of council land at 232 Ashfords Road to CDC, subject to agreement on community benefits. Councillors Mike Henderson and Jenny McKinnon voted against and Amelia Parkins abstained, and all three said they wanted more information and consultation. The CDC project still needs NSW Government assessment and approval, with the environmental impact statement and public exhibition yet to come. IREN will hold community drop-in sessions at Romano's Hotel in Wagga Wagga on Wednesday 4 November and Thursday 5 November.

REPORTING FROM

- 1 **PS News** · 'Blindsided': Fears Gregadoo will be transformed as second data centre planned for suburb
- 2 **dailyadvertiser.com.au** · Proposed Redbank Data Centre Community drop-in sessions | Classifieds | The Daily Advertiser
- 3 **blockspace.media** · IREN plans 900 MW data center, Redbank, in Wagga Wagga Australia

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

nbn and Victoria fund \$133 million fibre upgrade for 19,000 premises in 70 towns

A \$133 million partnership between nbn co. and Connecting Victoria will move more than 19,000 homes and businesses in 70 regional Victorian communities from fixed wireless to fibre to the premises, with all locations due to be ready to connect by December 2030.

Best Effort desk · Sat 24 Oct 2026 · 5 sources · 2 min read

WHY IT MATTERS

A sizeable group of regional premises will move off fixed wireless onto fibre, and nbn says the shift also eases load on the wireless network for those who remain. The program also pairs Victorian funding with the Commonwealth-backed national fibre upgrade program.

Fibre to the premises will become available to more than 19,000 homes and businesses in 70 Victorian towns and suburbs under a \$133 million program announced by the Victorian Government on 22 October 2026. The money comes through a partnership between nbn co. and the state's Connecting Victoria initiative. The government says the fibre runs right up to each premises and allows download speeds of up to one gigabit per second.

The government expects the first upgrades to be finished in 2027, with later stages continuing to 2030. nbn's own listing says construction has started in Sebastopol and surrounding areas, and that every location should be ready to connect by December 2030. In the first phase, more than 2,000 premises in Ararat, Donald, Castlemaine, Horsham, Mortlake, Sebastopol and Wendouree can switch from fixed wireless to fibre.

All the listed communities are currently served by nbn's Fixed Wireless network. The list also includes Ballarat, Bendigo, Geelong, Mildura, Traralgon and Warrnambool. Six Goulburn Valley towns are on it: Benalla, Cobram, Echuca, Kyabram, Numurkah and Tatura. nbn gives fixed wireless to fibre dates ranging across 2027 to 2030 and tells users to keep checking for updates.

nbn cautions that the program covers eligible premises in selected areas, so not every premises in a named community is necessarily included. It adds that premises estimates and rollout details are indicative and could change as design and construction proceed.

The work depends on nbn co's wider national fibre upgrade program, which has a Commonwealth funding package of \$3.8 billion announced in January 2025, of which \$800 million is from nbn co. The Victorian Government says

the new money follows Connecting Victoria projects that have improved connections for more than 100,000 homes and businesses in more than 180 towns and suburbs. nbn said more than 1.3 million Victorian homes and businesses can now reach fibre through its upgrade programs.

nbn says that as premises move to fibre, demand on the wireless network falls, leaving more capacity for those who stay on it. Minister for Government Services Enver Erdogan said, "Fast, reliable internet shouldn't be seen as a luxury – In the bush, it keeps communities safe, families connected and businesses open." NBN chief development officer, regional and remote, Gavin Williams said the extra upgrades would help more Victorians get the connectivity they need.

REPORTING FROM

- 1 **OzBargain** · [VIC] Free Upgrade from nbn Fixed Wireless to FTTP ...
- 2 **premier.vic.gov.au** · Fibre To The Front Door For 70 More Communities
- 3 **smartcity.org.au** · Fibre Broadband Expansion Reaches 70 Additional Communities in Victoria
- 4 **Corowa Free Press** · Local towns in line for faster internet
- 5 **Shepparton News** · Local towns in line for faster internet

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

DATA CENTRES 4 OF 12

InterContinental Energy eyes 300MW AI campus at Pilbara renewable hub

InterContinental Energy wants up to 300MW of IT capacity at its East Pilbara renewable project by the end of 2029, with a final investment decision targeted for the first half of 2027. It has not said whether talks with AI compute partners have produced commercial commitments.

Best Effort desk · Sat 24 Oct 2026 · 1 source · 3 min read

WHY IT MATTERS

The proposal reflects demand for securing large volumes of power for AI infrastructure, but its scale and timing depend on customer demand, investment decisions and delivery of the supporting energy and connectivity infrastructure. Its appeal will turn on the cost and reliability of power, connectivity investment and what prospective customers require.

InterContinental Energy (ICE) is aiming to host as much as 300MW of IT capacity by the end of 2029 at the Australian Renewable Energy Hub (AREH), in Western Australia's East Pilbara. The site lies roughly 2.5 hours by road from Port Hedland, and ICE is looking at pairing large-scale AI compute with renewable generation and green hydrogen output. It wants to reach a final investment decision and start building both the generation and the data centre infrastructure in the first half of 2027, and initial compute could start running in 2028.

Timing and capacity both hinge on customer demand, and ICE has not revealed whether its conversations with prospective AI compute partners have turned into formal commitments. The company described those talks as advanced and involving several potential partners, but would not give their status or terms. ICE will not build or run the data centres itself; it plans to supply powered land so that customers or partners can do that. Chief executive Alex Tancock told W.Media that interest is rising among AI developers, frontier labs, neoclouds and hyperscalers.

Under ICE's P2(H₂)Node model, renewable generation, AI compute and hydrogen production would share one energy system. ICE estimates that 300MW of IT load would need roughly 1GW of upstream wind and solar, and that the wider first stage could need over 2GW to also serve hydrogen and other industrial users. In the node design, about 2GW of generation would feed around 1GW of downstream load; AI compute could take 10-50 per cent of that, with the balance going to green hydrogen for its green iron customer. ICE did not tell W.Media how these configurations relate, or what overbuild and storage assumptions sit behind them.

ICE's design targets are 100 per cent renewable supply and 99.995 per cent uptime, though these remain targets. Batteries would handle firming initially, with hydrogen storage taking on more of that role over time. Tancock anticipates a grid connection from 2031, but the aim is for the data centres to sit behind the meter and draw on on-site wind and solar. He said the Pilbara Green Link might contribute to firming, although its main job will be exporting AREH power to Pilbara customers. W.Media noted that, without detailed storage capacity or operating data, the reliability target cannot be independently assessed. Tancock said nine years of on-site data feed modelling that suggests a capacity factor near 74 per cent, itself a modelled number.

On connectivity, Tancock said existing fibre routes run near AREH and could be upgraded, and that the project holds approval for four subsea cables into Asia. It was not specified whether those cables would carry energy, data or both. ICE is not building long-haul fibre itself; Tancock said fibre upgrades and possible subsea links are under discussion with carrier and customer partners, with spending dependent on confirmed demand. He said the four permitted cables give a base for later work rather than a commitment to build every one.

AREH is planned in stages, with ICE's longer-term ambition being up to 26GW of wind and solar against existing environmental approval for up to 15GW. Tancock said current talks envisage AI compute growing beyond 1GW of IT capacity after 2030, though no fixed share of the project's generation has been set aside for data centres. ICE also said ammonia is no longer planned at AREH, with any future production envisaged at the Boodarie strategic industrial area.

REPORTING FROM

1 **W.Media** · InterContinental Energy targets up to 300MW AI campus at WA renewable energy hub

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

DATA CENTRES 5 OF 12

Moss Vale data centre gas plant could be mothballed once grid supply arrives, court told

Developers appealing a council refusal of a 16-megawatt gas power station in the NSW Southern Highlands told the Land and Environment Court it would stop running on gas as soon as grid power is available. The council argues grid supply was never properly investigated.

Best Effort desk · Sat 24 Oct 2026 · 1 source · 2 min read

WHY IT MATTERS

The case tests whether a data centre can use temporary on-site gas generation while waiting for a grid connection, with a substation upgrade by Endeavour Energy the stated bottleneck.

Developers of a proposed gas-fired power station for a data centre campus at Moss Vale in the NSW Southern Highlands have told the NSW Land and Environment Court the plant could be mothballed once the grid can meet the site's demand. The court is hearing an appeal by Nakar Property after Wingecarribee Shire Council refused its development application for a 16-megawatt power station and battery energy storage system. The \$23 million project is one of three stations planned to power a campus proposed by Sydney company Cloud Carrier.

Barrister James Smith, for Nakar Property, told the court the plant was needed to give customers of the centre constant power. He said Cloud Carrier's investment in computers was about \$1 billion and that the fundamental

requirement was firm supply. Smith said Cloud Carrier "can't sell any product unless there is firm supply".

In opening submissions, Smith said the developers would stop using gas as soon as a reliable grid supply could be secured. He told the court the saving from connecting to the grid was approximately \$14 million per year. Smith said there was a "clear financial incentive to use the grid when that power becomes available", but that there was not sufficient supply. Citing expert reports, he said the plant was projected to emit less greenhouse gas than grid power until approximately 2029.

Michael Staunton, for Wingecarribee Shire Council, said grid supply had been touted as a "panacea" for the project but had not been investigated thoroughly. Staunton told the commissioner that the work should have been done and that the documents would show it had not been. In cross-examination he argued the project would lack the secure power to fill the data centre's servers for two years, until an upgrade of a nearby Endeavour Energy substation is completed. He said the time could be spent negotiating with Endeavour Energy while waiting for a permanent connection.

The council also tendered draft conditions of consent mid-hearing, including a new requirement for canopy trees across approximately 40 per cent of the site. Air-quality, electrical and engineering consultants appeared as witnesses for cross-examination. The second day of hearings before Commissioner Nicola Targett followed a site inspection on Tuesday, and the matter returns to court on Thursday for a third day.

REPORTING FROM

1 **ABC News** · Data centre gas plant could be mothballed after two years, court told

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

1414 Degrees now owns all of Aurora Energy Precinct near Port Augusta

1414 Degrees has closed its purchase of Vast Solar Aurora Pty Ltd and now holds the whole 16 km² South Australian site. The proposed 140 MW battery and a possible 1 GW data centre still lack binding commercial commitments and financing.

Best Effort desk · Sat 24 Oct 2026 · 1 source · 1 min read

WHY IT MATTERS

With one owner, talks on the battery, staged grid connections and a possible 1 GW AI data centre become simpler, though commercial commitments and financing are still outstanding.

ASX-listed 1414 Degrees (14D) has finished buying Vast Solar Aurora Pty Ltd, which gives it control of SiliconAurora and the 16 km² Aurora Energy Precinct close to Port Augusta in South Australia. Completion came on 20 October, under a share sale agreement the company announced in September.

The purchase ends the earlier 50% joint venture arrangement and moves a shareholder loan receivable of about \$1.76 million from SiliconAurora into the 1414 Degrees group. Also included are agreements tied to development approvals, plus engineering files on roads, dams, battery storage, civil works and environmental assessments.

The site has an approved 140 MW battery, which 1414 Degrees says has met technical requirements set by the Australian Energy Market Operator. The company intends the battery to supply firmed renewable power to customers on the grid and behind the meter.

The largest idea for the precinct is a data centre of up to 1 GW. In July 1414 Degrees signed a Heads of Agreement with an Australian data centre developer and operator. The site is also being pitched for renewable generation and for supply into the National Electricity Market. The filing stops short of announcing a binding power purchase agreement, a decision to build, funding or a finished customer deal.

1414 Degrees is seeking infrastructure developers and financiers to take part in a staged build, saying commercial commitments are needed to justify investment and future revenue. Executive chairman Dr Kevin Moriarty said a 33 kV pathway is meant to serve early projects while the larger transmission connection advances. The precinct additionally holds approvals for solar generation, battery storage and long-duration thermal energy storage.

REPORTING FROM

1 **middle.news** · 1414 Degrees Unlocks Full Control of Aurora Energy Precinct

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

CARRIERS & NETWORKS 7 OF 12

Aussie Broadband keeps FY27 EBITDA guidance at \$205m to \$215m as migrations wind down

Aussie Broadband told its AGM that FY27 underlying EBITDA is still expected at \$205 million to \$215 million, with more than 193,000 broadband connections added so far this financial year and the AGL migration due to wrap up in October.

Best Effort desk · Sat 24 Oct 2026 · 1 source · 1 min read

WHY IT MATTERS

The update suggests Aussie Broadband's larger subscriber base and NBN share owe much to acquired customer books, with underlying organic growth considerably smaller, while the company expects migration disruption to ease within weeks.

Aussie Broadband (ASX:ABB) used its annual general meeting to hold its FY27 outlook steady, with underlying EBITDA guidance of \$205 million to \$215 million. The range for capital expenditure also stands, at \$60 million to \$65 million.

The company has added more than 193,000 broadband connections since the start of the financial year, taking its base past 1.3 million. Much of that came from customers moved across from recent acquisitions. Leaving out the AGL, More and Tangerine customers, connections rose by 18,800, including 11,000 of organic net growth in residential.

The AGL migration is scheduled to finish in October. The company said the moves had caused short-term disruption for customers and operational noise, which it expects to fade within a few weeks.

Looking back at FY26, group revenue grew 9.2 per cent to almost \$1.3 billion, and underlying EBITDA came in at \$165.3 million. Ordinary fully franked dividends went from 4 cents to 6 cents per share. In August the company announced an on-market buyback of up to \$115 million, and its NBN market

share climbed 3.7 percentage points to 12.1 per cent over the year.

No first-quarter revenue or earnings numbers were included in the release. The company also stressed that its Look-to-28 ambitions should not be read as guidance.

REPORTING FROM

1 **SureStone Capital** · Aussie Broadband Reaffirms FY27 EBITDA Guidance

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

CARRIERS & NETWORKS 8 OF 12

Telstra enterprise ordering platform hit by problems after upgrade

Telstra says a planned upgrade to its Telstra Order Exchange platform has caused ordering problems for some enterprise customers, with staff processing requests manually. The telco has not said how many customers are affected or when service will be fully restored.

Best Effort desk · Sat 24 Oct 2026 · 1 source · 1 min read

WHY IT MATTERS

The ordering fault is a separate matter from the July outage, but it comes as Telstra's change management is already under scrutiny, and the lack of detail on scope and timing leaves enterprise customers and resellers without a clear restoration date.

Telstra is dealing with problems on the Telstra Order Exchange, the platform its enterprise customers use to place orders, according to ARN's report published on Friday 23 October 2026. ARN understands business customers, resellers and sales teams may be affected, at a time when device upgrades and contract renewals are busy. Reports cited by ARN say order processing and fulfilment have been delayed, leaving customers, dealers and account teams waiting for a fix.

A Telstra spokesperson told ARN the telco had completed a planned upgrade to the platform earlier in the week. The spokesperson said Telstra had since found issues that were affecting ordering for some customers. According to the spokesperson, Telstra teams are working through the requests manually while the fault is resolved, and the company expects normal service to resume soon. The company also apologised to business and enterprise customers for the

inconvenience.

Telstra did not confirm the full scope of the problem, the number of customers affected or when service would be restored.

The episode follows an external review a month earlier of Telstra's July outage. That review, by Technology Audit Partners, found Telstra had failed to treat network timing as a critical network capability, with unclear ownership, insufficient expertise and weak process controls contributing to the outage. It found the outage was triggered when incorrect date information spread through parts of the mobile network after planned maintenance on the network timing system. The findings were submitted to the Senate inquiry examining the Triple Zero disruption.

REPORTING FROM

1 **ARN** · Telstra enterprise experiences ordering and fulfilment issues

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

POLICY & REGULATION 9 OF 12

Victoria's data centre plan makes new projects bring their own power supply

Victoria's Sustainable Data Centre Action Plan, released on 22 September 2026, expects new data centres to back their electricity use with new renewables and storage and to pay for the network upgrades they trigger, according to law firm Mills Oakley.

Best Effort desk · Sat 24 Oct 2026 · 1 source · 2 min read

WHY IT MATTERS

If the expectations are implemented as described, Victorian data centre developers would face energy supply and network costs earlier in project planning, and renewable and storage developers would gain a new set of customers. Developers must also account for both the Victorian framework and the national standards still being developed.

The Victorian Government published its Sustainable Data Centre Action Plan on 22 September 2026, covering what it expects from new data centres on land use, energy, water and jobs. Law firm Mills Oakley calls the energy settings the plan's most significant element, effectively a "bring your own power supply" model that ties large new loads to new energy supply and supporting

infrastructure. A new planning control framework is to deliver the expectations, including a dedicated data centre land use and new referral pathways to energy and water authorities.

Operators are expected to offset the electricity they actually use by investing in new renewable generation and storage. They are also expected to pay for the connection and network augmentation attributable to their projects, upstream works included, to join demand flexibility services, and to design sites that reduce energy losses and run efficiently.

The Australian Energy Market Operator forecasts that data centres could account for approximately 12-13 per cent of National Electricity Market consumption by 2035-36, up from around 3 per cent now. Victoria wants that growth matched by new generation, storage and network investment, so other energy consumers are not left carrying the costs and reliability effects.

The plan sits inside a wider national debate. In March 2026 the Commonwealth set out Expectations of Data Centres and AI Infrastructure Developers, which called for demand growth to be accompanied by clean generation, storage, efficiency measures and demand flexibility participation. National Cabinet agreed in August 2026 to develop mandatory national standards for data centre projects, although views have since split on the role of conventional generation. Mills Oakley says Victoria has largely kept to the Commonwealth's original direction, and that the state requirements are meant to operate alongside the national standards, so both will matter to Victorian projects.

The firm expects power procurement to become a core part of the investment case, rather than something dealt with after major development decisions are made. It says securing renewables, storage and network access is likely to shape site selection, approval pathways, connection costs and financing. If time-based matching is adopted, it says developers may have to move beyond traditional run-of-plant PPAs to firmed renewable products, hybrid renewable and storage deals, or other structures able to supply power around the clock. It also advises that PPAs signed before the framework is settled address change-in-law risk, certificate arrangements and who bears any future firming obligations.

For renewable and storage developers, Mills Oakley says the reforms create a new type of customer with a regulatory reason to contract for new capacity. It expects connection talks to give greater weight to funded augmentations, prudential support and future cost allocation. The firm notes that significant implementation detail is still to be settled.

REPORTING FROM

1 **Mills Oakley** · Bring Your Own Power Supply: What's New in Victoria's Data Centre Action Plan

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

Swoop sells Sydney fibre assets to Xenith for about \$4.5m

Swoop Holdings has signed a binding deal to sell its Sydney fibre to Xenith for roughly \$4.5 million, the second fibre disposal to the same buyer this year. The sale needs FIRB approval and is due to complete in the third quarter of FY27.

Best Effort desk · Sat 24 Oct 2026 · 3 sources · 1 min read

WHY IT MATTERS

The sale shows a listed Australian retail telco offloading non-core fibre to cut debt and sharpen its consumer focus, while Xenith adds to its Australian fibre holdings.

ASX-listed Swoop Holdings will sell its Sydney fibre business to Xenith Infrastructure Group for about \$4.5 million. A binding share sale agreement was signed on 23 October 2026, with the assets moving to Xenith IG Australia Holdings Pty Ltd, part of the Xenith group.

The transaction cannot close until the Foreign Investment Review Board signs off under the Foreign Acquisitions and Takeovers Act, and other customary conditions must also be met. Swoop expects completion in the third quarter of FY27, which one source defines as the period from 1 July to 30 September 2027.

Swoop said it will use the net proceeds to pay down debt and fund general working capital. It added that it does not expect the sale to disrupt operations or customer service.

Xenith is headquartered in Singapore and develops digital infrastructure, with experience owning and running fibre networks around Asia Pacific, Australia included. ARN calls the buyer a dark fibre provider.

In June, Swoop agreed to sell all the shares in Luminet Fibre, which owns the Melbourne Fibre Project, to Xenith IG Australia for \$11 million. Swoop framed the Sydney sale as part of a continuing effort to extract value from non-core assets and concentrate on consumer telecommunications.

ARN links the refocus to the exit of chief executive Alex West on 7 July. In mid-July, interim chair Tony Grist told ARN he saw few further sales ahead, as "there's not really a lot more to divest". He pointed to fibre holdings in Melbourne and Adelaide, acquired under earlier leadership, as possible disposals that were immaterial to revenue and emerging cash flow. ARN notes

he did not mention Sydney.

REPORTING FROM

- 1 **techpartner.news** · Swoop to sell Sydney fibre assets to Xenith for \$4.5m
- 2 **ARN** · Swoop continues to divest with \$4.5M Sydney fibre sale
- 3 **MarketScreener Hong Kong** · Xenith Infrastructure Group Australia Pty. Ltd agreed to acquire Sydney-based Fibre assets from Swoop Holdings Limited for approximately AUD 4.5 million.

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

SATELLITE & SPACE 11 OF 12

Capricorn Space to double Mingenew ground station site as antenna count hits 20

Capricorn Space has 20 antennas running at its Australian Ground Network – West site in Western Australia and plans a second parcel of almost six hectares, plus more power capacity.

Best Effort desk · Sat 24 Oct 2026 · 1 source · 2 min read

WHY IT MATTERS

Customers returning for extra antennas and a site set to double in size indicate demand for ground segment capacity in Australia, an area the Statement on Space ties to sovereign control of data. The ACMA restriction on new terrestrial radio services around Mingenew, in place since 2009, protects the site from interference.

Capricorn Space plans to double the land it uses at Australian Ground Network – West (AGN-W), near Mingenew in Western Australia, after customer demand pushed the site to 20 operational antennas. The company said it expects further antennas to come online before the end of 2026.

Growth will come from developing Lot 2, a second parcel of almost six hectares (14 acres), together with a substantial lift in power generation and distribution across the site. Capricorn Space said the build-out is meant to serve ongoing demand for conventional single-antenna services and for newer offerings: phased arrays, gigabit optical services and processing of data on site.

Customers are satellite operators and ground segment service providers, who use one of three arrangements. Landlord clients put up and run their own antennas, hybrid clients combine their own specialist gear with Capricorn

Space antennas, and retail clients book scheduled passes on antennas and modems owned by Capricorn Space. Several customers now run more than one antenna there, and the site also hosts Australian and international groups developing new technologies, including for national and regional security.

AGN-W lies within the Mingenew Earth Station Protection Zone, where the ACMA has barred new terrestrial radio services such as microwave links since 2009, to keep interference away from satellite ground stations. The company also cites clear skies and a flat horizon in every direction, which suit tracking low-Earth orbit satellites, and a location that can receive data from polar and sun-synchronous satellites soon after passes over South-East Asia and the Indian Ocean.

The government's Statement on Space, issued in July 2026, named ground segment platforms supporting sovereign data control as a key opportunity for local industry. Mark Thompson AM, chief executive officer and chief engineer of Capricorn Space, said, "Clients coming back to install a second and third antenna is the clearest endorsement a ground station can get". Thompson said more of the data that matters to Australia and the region "should land on Australian soil, at Australian-owned infrastructure, and that is what we are building."

REPORTING FROM

- 1 **Space Connect** · Capricorn Space prepares for growth phase of Australian Ground Network – West site

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.

CARRIERS & NETWORKS 12 OF 12

Optus streams 400 Oracle tables into Databricks to speed regulatory reporting

Optus is using Confluent's Oracle change data capture tooling with Kafka to feed 400 tables from legacy customer applications into Databricks in near real-time, cutting data preparation for leadership from days to hours.

Best Effort desk · Sat 24 Oct 2026 · 1 source · 2 min read

WHY IT MATTERS

Optus is treating faster, more accurate data from legacy systems as a regulatory requirement, not just an analytics upgrade. The shift from waiting days to hours shows how a carrier under compliance pressure is reworking its data pipelines.

Optus has sped up the extraction of information from legacy customer-facing applications that sit on an Oracle database, as it works to satisfy regulatory and compliance obligations. Its pipeline combines Confluent's Oracle CDC and LogMiner components with the Kafka streaming platform, moving 400 tables into the Databricks analytics platform.

Anupam Das, Optus's associate director of design and delivery, described the setup at a Databricks customer event. He said the data feeds analytical and reporting uses and, most importantly right now, regulatory ones. Das said the data is "very crucial in terms of accuracy".

The method has cut the time taken to prepare data for Optus leadership and other parts of the business from days to hours, according to Das. The aim is to give leadership an accurate view of how the business performed over the previous day. Das said that "This was not possible two years back" and that Optus previously waited two or three days.

The same technology lets Optus track customer behaviour in its stores in near real-time, which Das said opens marketing opportunities such as product offers based on purchase behaviour. He said it would also allow more machine learning and AI to be applied to the data, rather than leaving it locked in legacy silos.

The work sits alongside a unified data platform that Optus has recently completed with a consortium of Microsoft, Databricks and Tech Mahindra. The platform brings data from across the business into a data lakehouse on Azure, with Databricks providing analytics and governance. Optus chief information officer Mark Potter earlier said the transformation would run in two phases: a lift-and-shift from a data warehouse nearing end-of-life, then the consolidation of two other substantial data marts. Potter said some data would stay outside the platform and be added as needed, and that Optus was not pursuing "one data mart for the entire organisation".

Das said Confluent's streaming technology is already playing a "key role" in the transformation, which will continue for now. He said the tech stack may change, but Confluent is expected to play a significant role in the layer that moves data into the platform.

REPORTING FROM

1 **iTnews** · Optus chasing "near real-time" data as regulatory pressure looms

Written by AI from the reporting above. Quotes, numbers and names were checked against those sources before publication.