SSDA
SERVICE STATION DEALERS OF AMERICA AND ALLIED TRADES

SSDA News

Service Station Dealers of America and Allied Trades

VOLUME 40, ISSUE 2 FEBRUARY, 2026

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SSDA-AT Joins Broad Coalition Urging Treasury to Finish the Job on CTA

By Roy Littlefield

SSDA-AT joined more than 100 trade associations in calling on the U.S. Treasury Department to take immediate action to protect small business owners from unnecessary privacy and cybersecurity risks created by the Corporate Transparency Act (CTA).

Led by the Main Street Employers Coalition, the letter urges Treasury to purge the CTA database of beneficial ownership information submitted by domestic businesses that are no longer required to report. It also calls on Treasury to swiftly finalize the rule that formally exempts U.S. businesses from the CTA's reporting requirements.

The CTA was intended to combat illicit finance, not to stockpile sensitive personal data from law-abiding small business owners. While the Administration took an important step last year by narrowing the law's scope to apply only to foreign entities—relieving more than 32 million domestic businesses—roughly 16 million U.S. entities had already complied. Their personal information remains stored in a FinCEN database, exposing them to ongoing cybersecurity and disclosure risks with no legitimate justification.

The letter underscores the urgency of action, particularly as legal challenges to the CTA continue to move through the courts. With multiple cases questioning the law's constitutionality and one headed toward Supreme Court review, Main Street businesses should not be left in limbo.

Treasury has already corrected course once. SSDA-AT and its partners are now calling on the Department to take the final step—purge the data, finalize the rule, and allow small businesses to move forward with confidence.

Building a Successful Website

By: McKensie Curnow of Net Driven

Building your own website has become increasingly simple and inexpensive in recent years. Though easy and accessible, DIY websites do not guarantee a website that works well or leaves a lasting impression for your business and your audience.

Your website is a reflection of you and your business, so you're obviously going to want to build a strong, professional, and positive presence to attract customers. Taking the risk of building a website on your own is taking the risk of losing potential leads and damaging your business's reputation – we never get a second chance to make a first impression!

When you invest in a professional web design team, such as our team here at Net Driven, you're not only investing in the visual appearance and accessibility of your website, you also invest in expert advice, techniques, and best practices to create the best possible user experience. Spending less money and trying to do it on your own may seem like the easy way out, but let's dive into why it's important to give your business the professional auto service website design it deserves.

COMMON MISTAKES MADE BY INEXPERIENCED DESIGNERS

Poor Structure & Navigation

A website should be attractive, accessible, and easy to navigate; all in all, user-friendliness is vital. A site's content should be understandable and full of useful information without being cluttered. In today's day and age, people like quick and simple. If they can't find what they need without gaining a headache, they're going to leave your site and find a frustration-free one instead. At Net Driven, we know how to organize automotive websites in a way that makes sense for both the business owner and their potential customers.

Lack of SEO

If no one can find your website, what's the point in making the effort of creating one? Many rookie designers forget the importance of SEO, or Search Engine Optimization.

As a certified Google Partner, our team highly knowledgeable of auto-

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NET DRIVEN

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motive SEO and works hard to make sure your site gets found.

Missing CTA

Your website is one of the most powerful marketing tools for your business.

Not only does your website have the power to bring in new customers, it also helps current customers remain loyal if they find what they're looking for with minimal frustrations.

One of the main components of a great website is a clear CTA, or call-to-action.

A CTA is what converts website visitors into customers by driving them to purchase your good or service. If your website is missing a clear CTA, you'll lose sales and customers.

At Net Driven, our team ensures that every website offers conversion-focused responsive web design.

Using Free or Low-Cost Templates

Rookie designers are likely to use a free or low-cost template for their website.

While this may seem like an easy solution, it will make your website look generic and unconnected to your brand.

Your business is unique, your website should be, too. Our designers take the time to ensure each one of our automotive websites are exclusive to the client and capture the individuality of their business. As with any service or good, you get what you pay for.

Your money buys value, which in turn, will actually build your business's bank account in the long run.

Your company's website is no exception. If you want to leave a lasting, positive impression of your brand, leave website design to the professionals.

Still not convinced?

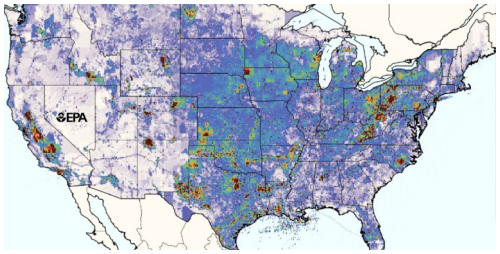
Check out our portfolio of the finest responsive web design in the automotive industry.

For further details, visit our solutions and packages pages.

US Emissions Jump 2.4% in 2025 After 2-year Decline

US greenhouse gas emissions rose 2.4% in 2025, reversing a two-year decline, according to the Rhodium Group.

The increase was driven by higher demand for heating and electricity, with coal generation up 13%. The report notes that the Trump administration's policies have not yet significantly affected emissions, but future tracking may be challenging as the administration has stopped collecting certain climate data.



EPA Aims to Limit State Power Over Energy Projects

The Environmental Protection Agency has proposed limiting states' authority under Section 401 of the Clean Water Act to block projects, such as natural gas pipelines, aiming to accelerate the construction of fossil fuel infrastructure and data centers.

The proposal, similar to a rule from the first Trump administration, would impose strict review deadlines and require detailed explanations for permit rejections.

Japan's Mitsubishi to Acquire Shale Gas Assets in U.S. for $7.5 billion, CNBC

Mitsubishi Corporation said that it will acquire shale gas assets in the U.S. in a $7.53 billion deal, including debt, as the Japanese trading house looks to build on its presence in the country's energy market.

Mitsubishi is looking to capitalize on rising power needs from data centers, manufacturing, as well as LNG exports, by expanding in the the world's largest gas market, citing domestic consumption, production, exports, and further demand growth.

It will acquire the assets from Aethon Energy Management in Texas and Louisiana in a transaction that includes $5.2 billion in equity purchases and $2.33 billion in Aethon's debt.

Mitsubishi's deal comes after Japan's largest power generation company, JERA, announced a $1.5 billion investment in October in the Haynesville Shale basin on the Louisiana-Texas border, as part of Tokyo's $550 billion investment pledge to the U.S.

Japanese media outlet Nikkei reported that projects in the energy sector were likely candidates for Japan's investment pledge, although it was not immediately clear if Mitsubishi's deal counts toward the proposed investment.

In a filing with the Tokyo Stock Exchange, Mitsubishi said that the investment will strengthen the earnings base of the company's natural gas and LNG businesses.

It will also accelerate efforts to build an integrated value chain in the United States, "from upstream gas development to power generation, data center development, chemicals production, and related businesses," the company said.

Shares of Mitsubishi fell 2% after the transaction was announced.

The company has multiple investments in natural gas, with projects in Alaska, Malaysia, Canada and Indonesia, among others.

Mitsubishi has a total LNG production capacity across projects of about 15 million metric tons per year currently, and Atheon assets are estimated to add a similar capacity, doubling overall output.

The company said it also plans to expand in the U.S. by engaging in power generation and manufacturing businesses that capitalize on competitive upstream gas projects.

Mitsubishi currently has partnerships in upstream shale gas development with U.S. energy company Ovintiv in British Columbia, Canada, midstream marketing and logistics through subsidiary CIMA Energy in Houston, and LNG exports via LNG Canada and Cameron LNG.

Mitsubishi Corporation

US E15 Talks Continue as Funding Crunch Looms, argus

Energy groups are still negotiating legislation to expand access to a higher-ethanol gasoline blend and rein in refiners' ability to skirt biofuel mandates, as a looming funding impasse adds urgency to the talks.

Negotiations that include the American Petroleum Institute (API) and the ethanol advocates Growth Energy and the Renewable Fuels Association continue, three people familiar with the talks told Argus. The hope is to reach some compromise on a bill that could revamp retail fuel markets in the US and convince lawmakers to add it to a larger package, potentially legislation to fund the government after 30 January.

The powerful oil group withdrew support for a slimmer bill last year that would have allowed year-round sales of gasoline with 15pc ethanol (E15) and is pushing instead for a broader package that would make it harder for small refineries to win hardship exemptions from annual biofuel mandates.

President Donald Trump's administration granted dozens of those hardship requests last year and floated making companies without exemptions blend more biofuels to compensate, unnerving oil majors and reshuffling the E15 debate.

Smog rules separately limit summertime sales of E15 in most of the country without emergency waivers, which advocates say has deterred retailers from investing in new infrastructure. Most US gasoline is sold as a 10pc ethanol blend.

The API and the ethanol groups agree on the general framework of a bill that would authorize E15 year-round and limit future exemptions from biofuel mandates, including by preventing larger refiners that own small units like Delek and Par Pacific from requesting relief. The groups plan to support adding new exemption provisions to existing E15 bill text rather than push lawmakers to scrap that draft, two people familiar with the talks said.

But there are still thorny issues to resolve — such as the effective date for any changes — and some provisions risk riling energy and farm interests otherwise on board with reining in exemptions.

Adding to, rather than replacing, the current E15 bill would, for instance, keep a provision effectively compensating some small refineries for past biofuel mandates. That draft would return compliance credits to certain refiners and — unlike current rules where credits expire — allow their use in future years. Even small facilities can spend tens of millions of dollars each year buying enough credits

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US E15 Talks Continue as Funding Crunch Looms, argus

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to comply with the mandates, and returned credits usable indefinitely would be even more valuable.

Eligibility is limited to small refineries that retired credits to meet biofuel mandates in 2016, 2017 or 2018 and had hardship petitions outstanding to start December 2022, as well as companies that complied with 2018 quotas and had petitions denied before July 2022. EPA exemption data those years is limited, making it unclear which companies would benefit.

Calling on Congress

The groups working on revised bill text have another challenge: convincing Congress to act.

Growth Energy, the Renewable Fuels Association and dozens of other farm and biofuel groups urged Congress to pass some E15 fix "as soon as possible" in a joint letter to House and Senate leaders.

E15 legislation is unlikely to pass on its own, so lobbyists are closely tracking the legislative calendar for opportunities to add it to larger packages. The letter does not mention the API talks, which are proceeding separately.

Small refiners worried about losing access to relief — at the same time as the Trump administration readies what could be record-high biofuel quotas for the next two years — will also press sympathetic lawmakers.

Notably, a statement accompanying a bipartisan appropriations bill draft released recommends that EPA rethink "policies and procedures" for exemptions in response to a 2022 Government Accountability Office analysis that criticized the agency's approach.

That watchdog report questioned EPA's argument that small refineries can easily pass on the costs of meeting biofuel mandates in fuel sales.

Energy lobbyists noted that the statement's recommendations are nonbinding and that similar language around exemptions has appeared in past statements accompanying appropriations bills.

But it signals that some members of Congress might oppose any changes to fuel policy that could raise costs for refineries in their districts and states.

API chief: Venezuela Tops Energy Watch List Amid US Interest, MSN

Geopolitical developments are attracting the attention of executives at the American Petroleum Institute.

"The biggest energy story right now is Venezuela," said Mike Sommers, API president and chief executive officer, during a media call ahead of the organization's annual State of American Energy Event.

Venezuela sits on some of the world's largest reserves and, until corruption and unrest took hold, was the world's largest oil producer at about 3.7 million barrels a day. Today, he said it produces less than North Dakota at under 1 million barrels a day.

Following the capture of former Venezuelan President Nicolás Maduro, Sommers said U.S. oil companies are interested in President Donald Trump's efforts to rebuild the South American nation's energy infrastructure.

But first, he told reporters, there are key prerequisites that must be met before investment dollars flow, beginning with security — security of personnel and of the infrastructure.

Policy changes in terms of contracts and rules of law are also needed, he said.

Sommers said API executives and members are also watching events in Iran, which could also impact oil markets.

"(Imports from the) Middle East are at a generational low. The U.S. is now the world's largest producer, producing four times more oil and natural gas than Venezuela and Iran combined," he said.

That means U.S. oil producers have provided stability and insulated consumers from geopolitical uncertainty, he said.

The state of U.S. oil is strong "but is entering a new era we call the de-

API chief: Venezuela Tops Energy Watch List Amid US Interest, MSN

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mand decade, driven by technology, industry and population growth," he said.

This historic demand growth is prompting the API to focus on helping develop policies that embrace that growth, said Dustin Meyer, senior vice president of policy, economics and regulatory affairs.

The argument that U.S. oil production had peaked and additional infrastructure was not needed has collapsed under the realization of growing demand for gasoline, oil and natural gas, electricity and liquefied natural gas, he said.

Topping API's list of policy priorities is comprehensive legislative permitting reform, Meyer said.

It takes too long to permit infrastructure projects under the current system, he said. Bipartisan reform is needed to protect permitting from various political swings.

"We believe permitting reform is part of affordability," he added.

Sommers explained that, with energy demand rising, the inability to build needed infrastructure like transmission lines, pipelines and export facilities would leave the U.S. behind in the race for artificial intelligence development.

A second priority is access to energy development in federal waters and on federal land, Meyer said, including lease sales and establishing a durable, long-term leasing framework for federal lands and waters and in Alaska.

Third is protecting America's energy advantage at home and abroad, including ensuring extraterritorial rules like the European Union's Corporate Sustainability Due Diligence and EU Methane Regulation do not disadvantage U.S. producers.

"We believe every energy system will have to be supported to meet demand," Sommers said.

"The basis will continue to be oil and natural gas, and with electricity generation, natural gas particularly."

INSIGHT: US Chem Project Drought Continues into 2026, ICIS

The US will continue to start up few chemical projects in 2026 amid a global supply glut that will take at least two years to absorb.

The sole major project that could start up in 2026 is Golden Triangle Polymers, which is being developed by a joint venture made up of Chevron Phillips Chemical and QatarEnergy.

The joint venture could start up an integrated polyethylene (PE) project in Orange, Texas in late 2026 or early 2027.

In mid-2026, BASF expects to complete the third and final phase of an expansion project in Geismar, Louisiana, that will increase capacity for methylene diphenyl diisocyanate (MDI). The three phases will double the site's capacity from 2021 levels.

A Danish startup company named Again had planned to start up its first commercial-scale plant in Texas City, Texas, that would convert hydrogen and waste carbon dioxide (CO2) into glacial acetic acid. However, the scale is smaller than traditional acetic acid plants. Again intends to market the plants to companies that want secure, onsite sources of acetic acid that they can use to produce downstream products.

Again did not immediately respond to a request for comment about the status of the project.

Beyond 2026, Eastman could start up a metathesis unit at its complex in Longview, Texas. The company said that it should start realizing benefits from the unit in 2028.

Metathesis units convert ethylene to propylene, and the project will give Eastman the flexibility to sell its excess ethylene to the merchant market or convert it into propylene for internal use.

In January, Dow plans to provide an update on its delayed Path2Zero integrated PE project in Fort Saskatchewan, Alberta province in Canada. It halted work on the project because the downturn in the chemical market has lasted longer than expected.

West Virginia Methanol continues to evaluate potential projects. It owns a site for a methanol project in Pleasants county, West Virginia that is permitted and has an engineering, procurement and construction (EPC) contractor, said Ronald Zapletal, majority owner. The company expects to go out for financing in the second quarter of the year. No timeline for construction was available.

The company is evaluating sites in western Texas given the region's low prices for natural gas, Zapletal said.

Chemical Industry to Bet on Agentic AI, c&en

Agentic artificial intelligence, a form of AI capable of making autonomous decisions, is gaining traction in the laboratory and on the factory floor. The chemical industry will increasingly adopt it in 2026.

“AI agents are autonomous units, something that can think and do stuff on its own. But, of course, it needs to be instructed,” says Marc Feldmann, senior principal at Alexander Thamm, an AI consulting firm that has advised several chemical companies.

Feldmann says that, for now, he is seeing adoption mainly among big firms such as BASF and Bayer. In a blog post published on the Chemical Industry Journal website, Feldmann cites the example of the chemical giant Celanese, which created JO.AI, a platform of specialized AI agents, for its plant operations.

“One agent optimises shift checklists. Another flags anomalies—‘Corrosion might be an issue in heat exchanger 3.’ A third drafts work orders,” he writes about the Celanese agent.

Traditional AI applications are often preprogrammed and operate with limited autonomy. In contrast, agentic AI is more autonomous and can independently review the literature, formulate hypotheses, design experiments, learn from feedback, and collaborate with humans through conversations.

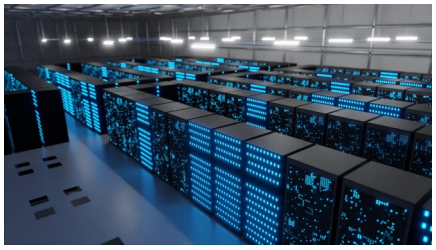
The advent of agentic AI is driven by the growing popularity of large language models, which can understand and generate human language. “The successful integration of large language models (LLMs) into laboratory workflows has demonstrated robust capabilities in natural language processing, autonomous task execution, and collaborative problem-solving,” write Yi Luo and colleagues in a paper about their creation of what they call a multiagent-driven robotic AI chemist.

Matlantis, a Japanese firm that offers a platform for rapidly simulating experiments at the atomic level, recently released an agentic AI platform designed for companies seeking to discover new chemical materials. In the coming year, more researchers will turn to agents to save hours and hours of laborious work, says Matlantis CEO Daisuke Okanohara.

“Our agentic AI tool can automatically plan and conduct experiments using simulators to discover new potential candidates for novel materials,” Okanohara says. For instance, a chemist can ask the Matlantis agent to determine the melting point of a material, and the agent will generate a series of tasks and subtasks, simulate the experiments, and provide an answer, he explains.

Moreover, the availability of agentic AI will enable researchers who aren’t skilled in computational methods to simulate a wide range of experiments, he adds.

Both Okanohara and Feldmann say they don’t see these agents replacing human chemists, at least in the near term. Okanohara argues that while agents are good at simulating experiments, they remain far from perfect at conducting physical experiments via robotics and automation. Feldmann points to other challenges in his blog post. “Many firms also struggle with fragmented data systems, legacy infrastructure, and people’s reluctance to hand over control to software,” he writes.



Oilfield Services Jobs Edge Lower to Close 2025, EWTC Data Shows, World Oil

Energy Workforce & Technology Council said U.S. oilfield services employment edged lower in December 2025, closing out a year marked by workforce adjustment and market uncertainty.

Energy services employment totaled 629,372 jobs in December, down 184 positions from November, according to preliminary data from the Bureau of Labor Statistics and EWTC analysis. The December figures cap a year in which employment peaked at just over 640,000 jobs in April before trending lower through the second half of 2025.

By year-end, oilfield services employment was roughly 11,000 jobs below its spring high, representing a year-over-year decline of about 2.3% compared with 2024. EWTC said the moderation reflected a challenging operating environment shaped by market volatility, tariffs, rising costs, and permitting delays, though employment levels remained relatively stable compared with past industry downturns.

Nationally, the U.S. economy added 50,000 jobs in December, while the unemployment rate fell to 4.4%, according to federal data. Overall employment growth in 2025 was the weakest since the 2020 recession, highlighting broader economic headwinds across multiple sectors.

Texas remained the largest energy services employer in December, followed by Louisiana and Oklahoma, according to EWTC's state-level breakdown.

ENERGY WORKFORCE & TECHNOLOGY COUNCIL

API to Washington: Meet Energy Demand or Get Out of the Way, Oilprice.com

At the American Petroleum Institute's annual State of American Energy event, API President and CEO Mike Sommers framed the coming decade in blunt terms: energy demand is rising fast, and pretending otherwise is no longer a political luxury that the United States can afford.

Looking back nearly two decades, Sommers reminded the audience that in 2007 the U.S. produced just 5 million barrels of oil per day and relied heavily on imports, including from Venezuela. "Energy strength doesn't happen by chance," he said. "It is a choice." That contrast, he argued, explains how the U.S. became the world's leading oil and natural gas producer while Venezuela collapsed under what he described as "state-sponsored theft and corruption."

Sommers referred to the next ten years as "the Demand Decade," warning that "multiple forces are converging to drive up energy needs dramatically." The question, he said, is not whether demand will materialize, but whether the U.S. energy system can deliver "with the speed, scale and reliability that this moment demands."

The United States now produces more than 13 million barrels of oil per day and has become the world's top LNG exporter. Over the past decade, the U.S. has shipped more than 8,000 LNG cargoes, contributing nearly half a trillion dollars to the economy and supporting 275,000 jobs. At the same time, Sommers noted, American producers have driven down emissions per barrel through efficiency and innovation, arguing that "no other country has matched America's ability to produce more energy with fewer emissions."

But production alone will not be enough. Infrastructure, Sommers said, is "the hinge point of the Demand Decade." He pointed to the Mountain Valley Pipeline as a cautionary tale, saying it "took longer to permit and build than the entire Apollo space program," adding that "a system that requires an act of Congress to build a pipeline is a system that's broken."

Sommers said voters are rejecting scarcity politics. "We're done with that," he said. "The mainstream has moved decisively toward abundance, affordability, and growth." The choice, he concluded, is clear: "We choose energy success, not surrender."

US Oil Drilling to Slow as Prices Slump, Venezuela Growth Could Amplify Pressure, EIA says, Reuters

Lower oil prices are expected to cut U.S. drilling activity and reduce output by 1% this year from the top producing country, while potentially higher supply from Venezuela could add pressure, the Energy Information Administration said.

The comments from the Department of Energy's statistical arm echo concerns expressed by some U.S. oil producers about U.S. President Donald Trump's request for domestic oil companies to enter Venezuela and help raise its output after the capture of President Nicolas Maduro. Already reeling from low oil prices, U.S. shale producers have said the push for more Venezuelan oil to hit the markets will hurt them even more.

Brent crude oil prices are likely to average $56 a barrel this year, compared to $69 a barrel last year, as global production of liquid fuels outpaces demand and causes a buildup of inventories, the EIA said in its monthly Short Term Energy Outlook report.

The EIA's latest outlook was finalized under the assumption that sanctions against Venezuela will stay in place through 2027, the agency said. If those sanctions ease, oil prices could fall more steeply than its current expectation, the EIA said.
"Any change in sanctions or other U.S. government policy related to Venezuela that could result in more oil production than we assumed in this forecast would put additional downward pressure on oil prices," the EIA said.

U.S. Treasury Secretary Scott Bessent told Reuters that more U.S. sanctions on Venezuela could be lifted to facilitate oil sales.
U.S. oil production is set to slip to an average of 13.59 million barrels per day this year, and then to 13.25 million bpd next year, before factoring in the anticipated easing of sanctions against Venezuela, the EIA said. U.S. oil output averaged a record 13.61 million bpd in 2025, the agency said.

"Over the next two years, we expect sustained lower crude oil prices will result in a pullback in drilling and completion activity that is enough to outweigh ongoing increases in productivity," the EIA said.

Big Tech is Poaching Energy Talent to Fuel its AI Ambitions, CNBC

Big Tech has been on an energy hiring spree. Technology companies investing heavily in artificial intelligence are bolstering their workforce with energy experts as they look to overcome the biggest bottleneck in scaling AI: access to power.

Energy-related hiring jumped 34% year-on-year in 2024, according to data compiled by Workforce.ai for CNBC. Last year's hiring almost matched this pace and remained 30% higher than pre-AI levels of 2022, when ChatGPT was released late in the year.

Energy is increasingly important to Big Tech companies whose AI ambitions hinge on securing power for insatiable data centers. Data centers accounted for around 1.5% of global electricity consumption in 2024 – representing a 12% year-on-year rise over the last five years, per the International Energy Agency. Demand is widely anticipated to increase further in line with the build-out of infrastructure.

Meeting that demand is one of Big Tech's biggest hurdles, leading companies to bring energy knowledge in-house and build their own supply — and, in some cases, gobbling up whole companies along the way.

It marks a step-change from traditional sustainability roles, which boomed in the Inflation Reduction Act era but lost steam amid broader ESG backlash that intensified as U.S. President Donald Trump's second term got underway. Instead, operational roles have been in demand: energy procurement, markets, grid interface and strategy, according to energy recruiters who spoke with CNBC.

Microsoft is a quiet winner of the talent war, with over 570 additions since 2022, including Betsy Beck who joined in January last year as director of energy markets. She previously held an energy markets and policy role at Google.

Microsoft also snapped up General Electric's former CFO Carolina Dybeck Happe back in 2024 to be the firm's chief operating officer — perhaps an early indication of the mega-cap's playbook.

It is second only to Amazon, which has notched 605 energy-related hires, though this data includes its subsidiary AWS.

Google has played catch-up to its Silicon Valley neighbors when it comes to AI – and it appears to be paying off as shares in its parent company, Alphabet, have been on a tear. Its market capitalization surpassed Apple's for the first time since 2019.

The technology giant's energy strategy — which has seen the addition of 340 hires since 2022 — has also garnered attention. Eric Schubert, an energy regulatory affairs advisor who previously worked with BP for nearly 14 years, joined Google in January, per his LinkedIn profile.

Google brought Duke University researcher Tyler Norris on board in November to head up energy market innovation, and is still growing its energy market and policy team.

Targeting energy and data center know-how

As well as individual talent grabs, Big Tech has snapped up energy-related companies while simultaneously scaling work with contractors. Notably, Alphabet is set to acquire data center company Intersect in a $4.75 billion cash deal that includes the assumption of debt.

Project and construction managers and people with land acquisition roles are increasingly in demand but are being serviced with temporary contracts to oversee the initial build-out of infrastructure for these tech giants, rather than via permanent employees, according to Daniel Smart, group CEO of The Green Recruitment Company.

Such companies are comfortable owning, funding, and running energy projects, "but they've never built one before, it's not really their core business," Smart said. "So they'll outsource the construction of it, and possibly even outsource

Big Tech is Poaching Energy Talent to Fuel its AI Ambitions, CNBC

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the running of it and just buy the energy. So there's different models and different ways in which they do it."

"Phase two" will be to try to improve the energy efficiency of data centers — perhaps leading to more permanent roles — he added, but it's not a current priority as "there's such a scramble for just getting the energy."

It could spell trouble for utilities and other energy companies now battling Big Tech's deep pockets for acquiring talent.

Jeff Anderson, business development director of a renewable energy recruitment consultancy Taylor Hopkinsons, said his team is "talking to senior candidates from the energy infrastructure space who are becoming aware of the opportunities in data centres and the higher salaries on offer in tech, and are making enquiries and plans to move across long-term."

"In the short-term, the talent market is going to be tight. The skillsets the tech companies are hiring — energy strategy, PPAs, grid connection — are already in demand across renewables and utilities. The talent is there, but it's a finite pool and that means competition for specialists that have tangible project experience is going to increase," he added.

For Travis Miller, senior equities energy and utilities analyst at Morningstar, increased energy demand actually offers "big opportunities" for utilities and their workforce as tech companies turn to them for support rather than seeing them as acquisition targets. "That's the most efficient way to do it from a workforce perspective and from an infrastructure perspective," Miller told CNBC.

"It's such a large amount of energy that they can't do it themselves," he added.

Big Tech has secured power purchase agreements with a range of companies, including those working on nuclear energy. Meta announced that it has signed deals with small modular reactor company Oklo — which was taken public via Sam Altman's special purpose acquisition company in 2024 — and Vistra and Terrapower. Oklo and Vistra saw their share prices pop over 17% on the news. That said, Meta also filed an application to the U.S. Federal Energy Regulatory Commission back in November to become an electricity trader. Amazon, Google and Microsoft already have approval to do so, meaning they can sell excess power from their own supply back to the grid.

"There are tech companies that are turning into energy companies," Smart said, though he added that this is only for their own use right now.

"But, then, they can also then sell any additional energy that they're making to neighbors or to the grid – if they can get connectivity."

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