US Data Center Daily Briefing

March 21, 2026

KEY THEMES

- NextEra 10GW gas plants in Texas and Pennsylvania
- Trump AI roadmap includes “Rate Payer Protection Pledge” for data centers
- Nvidia GTC unveils Rubin/Vera stack with 260 TB/s NVLink
- Super Micro execs charged over Nvidia server smuggling to China

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NextEra says the White House has approved **up to 10GW of new gas generation** in Texas and Pennsylvania — explicitly tied to Japan’s $550bn investment commitment under a U.S.-Japan trade deal. That’s a blunt answer to the question everyone in this business keeps asking: when the grid can’t keep up with AI load growth, who’s willing to build firm power, and how fast? Pair it with Washington’s fresh “rate payer protection” talk and you can see the shape of the next fight: data centers want capacity now, regulators want households insulated from the bill.

The Big Stories

NextEra approved to build up to 10 GW gas plants is the clearest signal today that gas is being pulled back into the “AI infrastructure” conversation at industrial scale. NextEra says President Donald J. Trump approved development of up to 10GW of natural gas generation in Texas and Pennsylvania, including a Texas hub developed with Comstock Resources. The projects would be jointly owned by Japan and the U.S. and built and operated by NextEra, subject to definitive agreements and project completion. Why it matters: the biggest constraint on data center expansion isn’t land or capital — it’s dispatchable power and interconnection reality. If this actually moves from announcement to steel in the ground, it’s a template others will copy: geopolitics funding + U.S. gas + fast capacity.

Trump unveils national AI legislative roadmap, includes data center pledge adds the policy frame around that buildout. The National AI Policy Framework lays out six priority areas (including child safety, IP rights, and state law preemption) and urges Congress to pass implementing legislation. But the line data center operators will care about is the push to codify a “Rate Payer Protection Pledge” aimed at preventing consumer rate hikes as tech companies connect data centers to the grid, building on a March 4 White House event where major tech firms signed the proclamation. Translation: the political system is signaling it wants AI infrastructure, but it doesn’t want retail-rate blowback. Watch how that pledge gets

operationalized—cost allocation, interconnection upgrades, and who pays for transmission will decide whether it's a speed bump or a brake.

Nvidia outlines AI-native data-center architecture and chips at GTC is the product-side reminder that demand isn't cooling—if anything, the industry is being pushed into a new design regime. Nvidia rolled out an integrated AI-native data-center architecture and stack—Rubin GPU, Vera CPU, Groq LPU inference chip, Vera Rubin NVL72 server, NVLink at 260 TB/s, BlueField-4 STX, Spectrum-X switch, and Dynamo orchestration—explicitly positioned around reducing the cost of token generation. The emphasis on memory, storage, and networking innovations (KV Cache, extended GPU memory) is a tell: compute isn't the only bottleneck anymore, and "agentic" workloads punish weak data paths. Why it matters: operators should expect continued pressure toward higher-density clusters, tighter east-west fabrics, and more expensive failure modes when performance is the product.

Super Micro executives charged in Nvidia-chip server smuggling scheme is the reminder that the AI supply chain's regulatory risk is now an operational risk. Prosecutors charged Super Micro Computer senior VP Yih-Shyan "Wally" Liaw and two associates with conspiring to smuggle U.S.-assembled servers containing advanced NVIDIA chips to China, alleging $2.5bn in orders (2024–2025) and at least $510m diverted to China. The indictment alleges fabricated documents, staged equipment, and a pass-through company to conceal clients. Why it matters: export controls don't just reshape where GPUs go; they reshape procurement, vendor diligence, and delivery timelines. For data center investors, it's also a governance and counterparty-risk story—especially where "AI infrastructure" revenues depend on regulated hardware flows.

Exowatt expands Austin campus to tackle AI power constraints sits at the other end of the power problem: not "how do we generate 10GW," but "how do we package power so sites can actually get built." Exowatt opened an 11-acre, 48,000 sq ft campus in Austin to accelerate deployment of modular solar energy systems, and launched ExoRise to deliver turnkey "powered land" in solar-rich U.S. regions. It also disclosed a $50m Series A extension backed by Overmatch Ventures. Why it matters: "powered land" is effectively an attempt to productize the hardest part of the development stack—energy + site readiness—at a time when interconnection queues and grid upgrade costs are turning real estate into a waiting game.

Behind the Headlines

BT outlines plans for PSTN switch-over and protective migrations looks like telecom housekeeping, but it's also an infrastructure dependency event for anyone with distributed operations. BT warns the U.K.'s copper PSTN will be retired at the end of January 2027, and it's increasing "protective migrations" to move remaining business customers to All-IP; around 80% of voice customers had moved by January 2026. The hidden issue is the long tail of legacy lines—especially where voice services are bundled with alarms, lift phones, or other building systems that aren't "IT projects" until they fail. Data center operators and portfolio managers with lots of remote sites should treat this as a deadline-driven resilience exercise: inventory dependencies, test failover paths, and don't assume "it's just voice."

India plans 786 GW non-fossil capacity by FY36 is the kind of macro power roadmap that quietly sets the ceiling for digital infrastructure growth. India's Power Ministry projects 786GW of non-fossil capacity by FY36 (within a total 1,121GW installed), peak demand of 459GW, and a huge storage requirement—174GW/888GWh (including 80GW/321GWh battery and 94GW/567GWh pumped). It also pegs investment needs at $2.2tn over the next two decades. For the data center industry, the takeaway isn't "India will build renewables"—it's the scale of the balancing challenge and the implied value of flexible load, on-site solutions, and grid-adjacent storage. Markets with clear, quantified adequacy studies tend to attract capital faster because developers can underwrite the constraints.

Ohio EPA reviews general wastewater permit for data centers is a small procedural item with big implications for how fast projects clear the non-power hurdles. Ohio EPA is reviewing a proposed general wastewater permit intended to streamline authorization for data centers to discharge specified cooling and limited stormwater wastes into surface waters; environmental advocates raised concerns about PFAS, metals, and ecological impacts, and the agency is reviewing public comments. This is what "data centers meet the real world" looks like: once an area becomes a growth market, permitting frameworks get pressure-tested, then standardized—or they become the choke point. If Ohio goes the general-permit route, other states will watch closely, because water and discharge rules are turning into the next local flashpoint after power.

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