

US Data Center Daily Briefing

March 25, 2026

KEY THEMES

- Australia Labor ties data centre approvals to energy, water
- Vertiv to buy Italy's ThermoKey for AI heat rejection
- Google–Sunraycer PPAs back ~400MWac Texas solar, 2027
- DOJ indicts Super Micro co-founder over \$2.5bn Nvidia server diversion

Australia just put the data centre industry on notice: approvals will now be tied to energy, water, and “sovereignty,” with the federal government openly framing delay as leverage. In practice, that’s a shift from “can you build?” to “what do you contribute?”—renewables support, grid upgrades, and domestic economic impact are now part of the permitting conversation. If this spreads, the playbook for hyperscale site selection gets a lot more political.

The Big Stories

[Australia ties data centre approvals to energy, water and sovereignty](#) is the clearest sign yet that governments are moving from being passive hosts to active gatekeepers. The Labor government’s national framework demands developers demonstrate local benefits and support renewables and grid upgrades, with ministers explicitly describing approval delays as strategic leverage. This matters because it turns “time-to-power” into “time-to-policy,” and it gives politicians a new, very direct way to shape where AI capacity lands.

[Vertiv to Acquire ThermoKey to Control Thermal Chain](#) is a smart, unglamorous move that fits the AI era. ThermoKey brings dry coolers and microchannel heat exchangers—exactly the facility-side heat rejection kit that becomes critical as liquid cooling pushes the bottleneck out of the rack and into the plant. With the deal expected to close in Q2 2026 (subject to approvals), Vertiv is effectively saying: in high-density builds, controlling the full “thermal chain” is as important as UPS.

[Sunraycer and Google sign PPAs for Texas solar projects](#) adds another large, concrete renewable offtake tied to big compute demand. The Lupinus and Lupinus 2 projects in Franklin County, Texas support a combined ~400MWac PV facility, targeting commercial operation in late 2027. The interesting detail is process speed: the deal was facilitated via LevelTen Energy’s LEAP and went from RFP to contract execution in under 10 weeks—suggesting procurement cycles are tightening as buyers race to secure clean supply.

[AWS ramps up data centre capacity across India regions](#) points to near-term capacity pressure in Mumbai and Hyderabad. AWS is signing letters of intent with six to eight colocation providers to expand footprint across those regions, building on its previously announced \$8.3bn investment in its Mumbai cloud region (announced January 2025). The message for India's colo market is straightforward: hyperscalers want optionality and speed, and they're willing to multi-source to get it.

[Super Micro Co-Founder Charged Over Illegal Nvidia Server Sales](#) is a reminder that "AI infrastructure" isn't just power and cooling—it's export controls and enforcement risk. DOJ unsealed an indictment alleging a conspiracy to illegally divert \$2.5bn of Nvidia-powered servers from the US to China, with arrests and proceedings in Northern District of California. Beyond the company-specific implications, this raises the temperature for the entire AI server supply chain: compliance isn't a checkbox when the numbers are this large.

Behind the Headlines

[Japan cabinet approves Electricity Business Act amendment to boost grid and generation](#) is the kind of policy plumbing that quietly determines whether data centre growth is smooth or painful. METI is pushing a draft amendment that promotes large-scale intra- and inter-regional transmission lines and large-scale power sources, while expanding loan funding via the Power Wide-area Operation Promotion Organization. It also tightens market governance (designation and supervision of wholesale exchanges) and adds pre-construction third-party conformity checks for solar PV support structures. Put together, it reads like a government preparing for bigger loads—and trying to remove the "who pays and who coordinates?" friction that kills grid projects.

[Octopus Energy acquires Uplight to boost US grid flexibility](#) is a bet that flexibility becomes the real scarce asset as data centre demand surges. Uplight sells software that helps utilities manage demand, and Octopus is explicitly linking the acquisition to load growth from data centre buildouts and broader electrification. Schneider Electric—an existing investor that valued Uplight at \$1.5bn in 2021—stays in as a significant minority partner, and Octopus's Kraken spinout will explore collaboration. Read-through: big energy retailers/platforms want a seat inside utility control rooms, because that's where the "yes/no" decisions on new load increasingly get made.

[Workshop examines energy and grid choices for AI data centers](#) shows how quickly the industry's energy conversation is shifting from "grid interconnect" to "bring your own generation." The NC State FREEDM Center workshop highlighted Duke Energy/IEA projections

of global AI data centre demand rising from 485 TWh (2024) to 945 TWh (2030), and spent time on onsite generation as a near-term pressure valve. The cited hyperscale examples in North Carolina—Amazon ~400MW and Microsoft 600MW—underline why: at these sizes, you're not just another customer, you're a grid-planning event. The policy thread matters too, with measures like Virginia HB323 to prioritize waste heat reuse hinting that social license will increasingly be written into energy and siting rules.

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