

US Data Center Daily Briefing

March 27, 2026

KEY THEMES

- Aligned Data Centers raises \$2.58bn revolver ahead of \$40bn BlackRock-GIP buyout
- Ecolab to buy CoolIT liquid cooling for \$4.75bn from KKR
- Arm AGI 136-core 3nm CPU with Meta first customer
- Georgia Power sued over \$50–60bn, 757MW data-center expansion approval

Aligned Data Centers just grabbed a \$2.58bn revolving credit facility — and it's hard to read it as anything other than lenders leaning into the AI-era data centre land grab. The timing matters: this comes right ahead of Aligned's pending ~\$40bn sale to a BlackRock Global Infrastructure Partners-led group. In other words, the buyout story isn't just a headline; the balance sheet is already being set up to build.

The Big Stories

[Aligned Data Centers raises \\$2.58bn revolving credit for expansion](#) to finish six later-stage US facilities and fund future development, backed by assets in Dallas, Phoenix, and Northern Virginia. PGIM is an anchor lender; the facility matures in three years with two one-year extension options. The signal here is straightforward: the cost of capital still matters, but the market is still willing to underwrite scale for operators sitting in the core AI corridors — especially with a marquee sponsor transaction expected to close later this year.

[Ecolab to acquire liquid data-center cooling provider CoolIT](#) for \$4.75bn from KKR, reportedly delivering ~15x on KKR's 2023 equity investment. Ecolab's pitch is about pairing CoolIT's engineered liquid cooling with Ecolab's water, chemistry, and digital services to sell something closer to "Cooling-as-a-Service" for AI halls. This is the increasingly obvious industrialization of AI infrastructure: cooling is moving from "component" to "platform," and strategic buyers are paying up to own the bottlenecks.

[Arm launches Arm AGI CPU purpose-built for AI data centers](#), with Meta as lead partner and first customer. The chip is designed by Ampere, manufactured by TSMC on 3nm, and is specced at up to 136 Neoverse V3 cores with a 300W TDP; Arm is claiming more than 2x performance per rack versus x86. Even if you discount marketing math, the more important point is ecosystem intent: Arm isn't just licensing cores into other people's roadmaps — it's trying to shape the CPU lane of "agentic AI" data centres alongside hyperscaler demand.

[Panasonic: Hyperscalers Reserve 80% Battery Output for AI](#) through FY2029, with plans to convert automotive cell lines from FY2027 and build a new module plant near its Mexico facility. The detail that should make operators sweat is the allocation dynamic: structural supply tightness that “favours hyperscalers over enterprise and colocation customers.” Rack-level backup and AI power spikes are turning what used to be a procurement line item into a competitive differentiator.

Policy and regulatory pushback is also getting less theoretical. [Sanders proposes pause on data center builds pending AI rules](#) — unlikely to pass, but politically potent as a framing device tying data centres to AI governance. Meanwhile, [Groups sue PSC to halt Georgia Power data center expansion](#) over a December approval that the challengers say effectively blesses unnecessary investment (they cite \$50–60bn and 757MW) to serve data-centre-driven load growth. Add the utility’s own claim that 80% of future demand will come from data centres, and you get the real investor takeaway: the next constraint may be less “can you build?” and more “can you build without triggering a ratepayer and permitting backlash?”

Behind the Headlines

[AI inference drives data center network and optical demands](#) makes a point the market still routinely underprices: inference, not training, is where the volume shows up. Training clusters are lumpy capex events; inference is the always-on business that forces sustained investment in DCI, optical, and scalable connectivity. If over 40% of new builds will be AI-focused (per the cited Ciena survey), the second-order winners won’t just be GPU and power players — they’ll be the companies selling the fabric that keeps distributed inference performant across metros and regions.

[Veritone shifts AI workloads to Oracle Cloud Infrastructure \(OCI\)](#) is a useful case study in where “sovereign” and “federal-compliant” requirements are pulling AI platforms. The company is migrating key products (aiWARE, Data Refinery, Data Marketplace) under a multi-year deal and emphasizes years of re-architecting and containerization to enable portability. The quiet message: cloud choice is becoming as much about compliance posture and deployment control as it is about raw price/performance.

[atNorth joins European Data Center Association to shape policy](#) reads like a membership update, but the subtext is the real story: operators are trying to get ahead of the EU policy machine while they expand AI-ready capacity. atNorth points to eight Nordic data centres, new builds in Kouvola (Finland) and Ølgod (Denmark), a Stockholm campus, and a “mega site” in Sollefteå (Sweden), alongside a climate-neutral-by-2030 target. As grid, water, and permitting

debates heat up, trade-group influence is becoming part of the build strategy — especially in markets selling themselves on sustainability as a competitive moat.

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