US Data Center Daily Briefing

April 25, 2026

KEY THEMES

- Wärtsilä 790MW off-grid gas plant for Texas AI data centre
- Virginia fights 2027 data-centre tax exemption with 24,000MW planned
- Canada flags $126bn major projects and July 1 AI data-centres framework
- Siemens Energy and GE Vernova lift 2026 guidance on data-centre demand

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A Texas data centre is getting its own 790MW off-grid gas plant — not a microgrid, a full-on power station — and Wärtsilä is the one building it. In a market where everyone talks about grid constraints, this is a blunt admission that "interconnection queues" aren't a plan. What's striking is how today's other stories rhyme with it: politicians delaying coal closures, regulators arguing over incentives, and equipment giants lifting guidance because data centres are now a first-order driver of the power supply chain.

The Big Stories

Wärtsilä to supply 790MW off-grid power for Texas data centre is the most consequential tell of the day. The order covers a 790MW natural gas plant using 42 Wärtsilä 50SG engines, with equipment delivery in 2028 and operations expected in late 2029, explicitly framed as support for AI model training hubs. The design is pitched as high-temperature-capable and "future renewable integration"-ready — but the real message is that large loads are choosing controllable generation over waiting for the grid.

Virginia is inching toward a make-or-break policy moment for the world's biggest data centre cluster. In Virginia lawmakers deadlock over data center tax incentive, the Senate wants to end the retail sales and use tax exemption on 1 Jan 2027, while the House wants to keep it but add environmental and energy conditions; the stalemate now forces a special session. The numbers embedded in the fight matter more than the rhetoric: 6,426MW operational and more than 24,000MW planned. For investors, this isn't just a tax tweak — it's a signal about how aggressively Virginia plans to throttle, steer, or continue to subsidise its own growth.

Canada is trying to bring order to its "everything at once" resource-and-infrastructure moment — and it's explicitly tying data centres into that agenda. In Canada advances Major Projects, pipelines, LNG and critical minerals, Minister Tim Hodgson said the Major Projects Office has referred 15 projects and six strategies worth $126bn, while highlighting approvals

including the $30bn Ksi Lisims LNG and two uranium mines framed as enough power for 40 million homes. The data-centre-specific kicker is the July 1 deadline for an AI data centres framework under a Canada–Alberta MOU — a reminder that the next bottleneck isn't just power, it's the rules for who gets it and under what terms.

The heavy electrical equipment cycle is being rewritten in real time — and data centres are a big reason. Siemens Energy raises 2026 outlook on data centre demand lifted sales growth guidance to 14–16% and margin to 10–12%, explicitly citing data centre demand, alongside preliminary Q2 sales of €10.3bn and profit before special items of €1.16bn. Pair that with GE Vernova raises 2026 guidance after strong Q1 results, where Electrification booked $2.4bn of equipment orders tied to data centres and the company now expects at least 110GW of combined gas turbine backlog and slot reservations by end-2026. Translation: the "picks and shovels" firms aren't treating this as a short spike — they're planning capacity and backlogs around it.

Europe's cloud politics are increasingly shaping where workloads land and who gets paid for them. Europe's sovereignty push accelerates across industry, cloud, and mining describes France's 150 "strategic" industrial projects (€71bn) and a broader EU push: a €180m cloud tender, procurement rewrites under a Cloud Sovereignty Framework, and expedited data-centre permitting in France, with companies like Brevo and Yousign moving off AWS. For operators and investors, "sovereignty" is no longer a talking point — it's a demand signal that can shift procurement outcomes, cloud architecture choices, and the value of in-country capacity.

Behind the Headlines

Maine's politics shows how quickly "pause the data centres" can become a mainstream policy proposal — and how quickly it can be defanged. In Maine Governor Vetoes Nation's First State Data Center Moratorium, Governor Janet Mills vetoed what would have been the first state moratorium (over one year) on large data centre construction, while saying she'll issue an executive order to create a council instead. The detail that matters is the veto rationale: preserving a carve-out for a proposed data centre in Jay. This is the emerging US pattern in miniature — public backlash forces process and oversight, but exemptions appear the moment a specific project becomes politically (or economically) real.

Japan is trying something that looks like industrial policy built for the grid era, not just the factory era. Japan selects promising regions for GX strategic industrial clusters has METI selecting 38 "promising regions" as first-stage pass candidates under a new GX Strategic

Regions system, including 9 “data-center aggregation” regions and 23 “decarbonized power utilization” regions (44 sites), with formal certification targeted around summer 2026. The subtext: data centres are being treated as anchor infrastructure that can be clustered, planned, and matched to power strategy — a very different approach from the more ad hoc, county-by-county US zoning fights.

The fibre story is quietly becoming a balance-sheet story for utilities — and a site-selection story for hyperscalers. Utilities Monetize Fiber to Serve AI Data Center Boom points to LOGIX Fiber Networks expanding in Texas (South Dallas and Bastrop County) to serve AI-driven hyperscale builds, while BEAD’s last-mile spending drives fresh middle-mile demand. It also gets into the mechanics that investors actually underwrite: IRUs typically running 20–30 years versus dark-fibre leases at 5–10 years, plus easement and sublicensing risks and the need for regulatory reviews (including potential FERC Section 203 implications). As power gets harder, network access is becoming the second constraint — and utilities that already control routes and rights-of-way have a monetisation lever that doesn’t require them to become a data centre operator.

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