# US Data Center Daily Briefing

May 26, 2026

**KEY THEMES**

- Enbridge–Meta $1.2bn 365MW solar + 1,600MWh Wyoming BESS
- BNEF NEO 2026: data-centre power use triples by 2035
- SEIA: US adds 9.7GWh BESS in Q1 2026; 610GWh by 2030
- Analog Devices buys Empower for $1.5bn to target AI power delivery

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Meta just put a big, very physical marker down in the AI power arms race: a $1.2bn solar-plus-storage build in Wyoming designed to feed its data centres with dispatchable clean power. Pair that with fresh warnings that data-centre load could triple by 2035, and you get the shape of the next decade: hyperscalers aren't just buying electrons — they're underwriting generation, storage, and the grid work needed to make it dependable.

## The Big Stories

Enbridge and Meta unveil $1.2B Wyoming solar and BESS project. Enbridge says its "Cowboy Project" in Wyoming will combine 365MW of solar with a 200MW / 1,600MWh battery system (Tesla supplying the batteries) to deliver dispatchable power to Meta's data centres under CLFP's LPCS tariff. Enbridge also framed it as an expansion of the Enbridge–Meta clean-energy partnership to roughly 1.6GW of contracted capacity across North America, with the project expected in service by end-2027. The key signal: this is what "AI-ready power" procurement looks like now — not just PPAs, but firmed output and a delivery structure built around data-centre needs.

BNEF NEO 2026: Data centres to drive higher power emissions. BloombergNEF's New Energy Outlook 2026 forecasts data-centre electricity use will triple by 2035 and could drive a 6% rise in global power-sector emissions by 2035. It also notes US$2.3tn went into energy-transition tech in 2025 — but says a Net Zero Scenario needs average annual low-carbon investment of US$4.8tn (this year–2030) and US$7.7tn (2031–2035). Investors should read this as the "capex gap" getting louder: demand is arriving on hyperscaler timelines, while supply-side decarbonisation is still priced and permitted on utility timelines.

US installs 9.7GWh BESS in Q1 2026, SEIA reports. SEIA's Q2 2026 Energy Storage Market Outlook says the US added 9.7GWh of battery storage in Q1 2026 (including 7.8GWh utility-scale) and lifts its 2030 forecast to over 610GWh, citing geopolitical-driven energy price

volatility. The report explicitly points to data-centre-driven demand signals like Google's 30GWh Form Energy iron-air deal and Meta's up-to-100GWh reservation with Noon Energy. The connective tissue to the Enbridge–Meta build is clear: storage is shifting from "grid nice-to-have" to a core product feature for data-centre power.

Analog Devices to acquire Empower Semiconductor in $1.5 billion deal. Analog Devices is buying Empower Semiconductor for $1.5bn all-cash; Empower makes integrated voltage regulators for AI processors and data centres (the story notes ADI at a $193bn market value and over $11bn FY25 revenue). This is an underappreciated part of AI infrastructure: the power-delivery stack inside the server is becoming a competitive battleground, not a commodity line item. If AI compute density keeps climbing, expect more "boring-sounding" power electronics to get valued like strategic IP.

India plans nearly ₹9 trillion transmission capex till 2032. Kotak Neo flags nearly ₹9tn of government-committed transmission capex through 2032, with Power Grid Corp posting ₹35,540 crore actual capex in FY26 and planning ₹1.08 lakh crore for FY26–FY28. The same report sees the HVDC market growing from $15bn in 2025 to $31bn by 2035, with annual transmission capex around $8–9bn. The message for data-centre developers is blunt: in India, "power availability" will increasingly mean "transmission reality," and HVDC is moving from niche to essential plumbing.

## Behind the Headlines

ERC urges reinstatement of Instagram reel blocked in India. The Environmental Reporting Collective is pushing Meta to restore an Instagram reel geo-blocked in India that documents villagers in Tarluvada, Andhra Pradesh alleging coercive land acquisition tied to Google's planned AI data centre. The story also sets the scale: a 1GW hyperscale AI facility on 601.4 acres in Andhra Pradesh with partners AdaniConneX and Airtel, and a stated $15bn investment over 2026–2030. This is the messy underside of hyperscale expansion: land, legitimacy, and local politics can become schedule risk — and social-media distribution decisions can suddenly look like infrastructure governance.

NTPC Green Energy FY26 Profit Rises 10%, Q4 Raises Questions. NTPC Green Energy posted FY26 consolidated net profit of ₹521 crore on revenue of ₹2,858 crore, while assets jumped to ₹60,381 crore after heavy capex; the board approved up to ₹5,000 crore in fresh borrowings for FY27. It also announced a joint venture with CtrlS Datacenters Limited for renewable projects (subject to regulatory approvals). The financial texture matters: the company relied on fresh borrowings (over ₹15,731 crore during the year), had investing outflows of ₹12,116 crore,

and spent over ₹15,264 crore on PPE in FY26 — a reminder that “green electrons for data centres” is capital-intensive, balance-sheet dependent, and very sensitive to funding conditions.

Applied Materials urges India to modernise grid for AI. Applied Materials and AMCHAM India are urging grid modernisation to support AI, including incentives for fabs and data centres to locate near clean power — and even floating small modular reactors near these sites for steady baseload. That SMR mention is notable not because it’s imminent, but because it shows how quickly the conversation jumps from “add renewables” to “we need firm power that matches compute uptime.” As India ramps transmission spend and courts AI infrastructure, expect the debate to shift from generation targets to system-level reliability and where you physically put big loads.

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