US Data Center Daily Briefing

August 30, 2026

KEY THEMES

- a16z $1.1B Machine Age Fund mandate includes data centers
- a16z thesis: rack power to 1 MW, GW-scale campuses within 3 years
- Hardware now over 20% of a16z deal flow
- Cybastion $75M AI data center and power plant in Douala, Cameroon

a16z's $1.1B Machine Age Fund puts data centers in the mandate

Andreessen Horowitz launched a new fund on August 28, 2026 that puts data centers inside its stated investment mandate. The firm said it raised $1.1 billion for the vehicle, which it calls the Machine Age Fund. The mandate covers chips, memory, networking, storage, and what a16z describes as "full systems for running AI: from data centers to robotics to home AI appliances." The announcement names investable pressure points — power, cooling, electrical, materials, and real estate — that sit around AI infrastructure buildout.

- a16z raises $1.1B Machine Age Fund with data centers in the mandate – Andreessen Horowitz says the fund will back "all of the computer infrastructure on which AI runs," explicitly including data centers, plus the cooling, electrical, materials, and real estate around them.
- a16z ties the fund thesis to rising rack power – the firm says rack power moved from roughly 5-10 kW to 100-250 kW and will reach 1 MW within three years, and that campus scale is moving from tens of MW to GW-scale.
- Hardware is now over 20% of a16z deal flow – the firm cites the shift as its rationale for making hardware "an official motion."
- Cybastion announces a $75M AI data center and power plant in Douala – the U.S. Embassy in Cameroon release names the Virginia-based company's investment intention within a $7 billion U.S.-Cameroon package announced August 27, 2026.
- Hydromine's 1,040 MW Grand Eweng hydropower project – the same embassy release lists the proposed $3.5 billion project on the Sanaga River among the announced opportunities.

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