US Data Center Daily Briefing

January 06, 2026

KEY THEMES

- Alphabet's $4.75bn acquisition of Intersect Power (co-located power + data centre strategy)
- UAE dispatchable generation build-out: 1GW Al Dhafra plant reaches financial close
- Rising US permitting and incentive scrutiny (Virginia pause call; Detroit health-linked permit demands; Maine local pushback)
- Liquid cooling consolidation and services expansion (Vertiv–PurgeRite $1bn)
- India grid stability upgrades: grid-forming inverters recommended for BESS >50MW
- AI infrastructure step-up: Dell/NVIDIA Rubin-era servers, 800Gb/s networking, and KV cache offload claims
- Memory form-factor shift for AI: Samsung SOCAMM2 (LPDDR5 CAMM2) roadmap toward Q2 2026
- Portfolio recycling in India data centres (CLINT minority stake sale to CapitaLand India DC Fund)

Global Data Centres & Digital Infrastructure Briefing (UTC: 2026-01-06)

Audience: Institutional asset managers and infrastructure fund managers (data centres, power, grid)

Top news (3)

- **Big-ticket power/compute convergence M&A:** Alphabet to buy Intersect Power for US$4.75 billion (cash; expected close **1H 2026**). Intersect stays standalone under CEO **Sheldon Kimber** and will collaborate with Google's technical infrastructure team on **co-located data centre and power projects**; **certain Texas and California assets are excluded**.
- **Dispatchable power build to serve data centres in the UAE:** TAQA, EWEC close AED 3.6bn Al Dhafra 1GW plant. Financial close reached on a **1 GW gas turbine** plant (capex **AED 3.6bn**) to supply **dispatchable power** to data centres; structured at ~**85% debt financing**; backed by a **24-year PPA** (signed April).
- **US permitting/political pressure rising around hyperscale growth:** Virginia urged to pause hyperscale data center approvals. The Piedmont Environmental Council asked the General Assembly for a pause pending full accounting and a transparent plan for **grid, water, air, and community** impacts; notes a warning to **FERC** about reliability/affordability risks and cites the state's data centre **sales tax exemption costing $1.6bn in FY2025**.

Key deals and corporate actions

North America

- **Cooling services consolidation:** Vertiv completes $1 billion acquisition of PurgeRite to boost cooling. Vertiv completed a **$1bn** acquisition to expand thermal management and **liquid cooling services** for AI/high-density deployments; the story cites liquid cooling market forecasts of **$17.7bn by 2030** (Grand View Research) and a **$15bn opportunity by 2028** (Dell'Oro Group).

Asia

- **India (portfolio recycling / fund alignment):** CapitaLand India Trust divests minority stakes in three data centres. CLINT agreed to sell **20.2% stakes** in **three under-development** data centre assets to the CapitaLand India Data Centre Fund for **~Rs 7bn (S$99.7m)**; the fund also receives a **right of first offer** on **CapitaLand DC Bangalore** (Bengaluru).
- **Singapore (vendor capex into AI-DC enablement):** Johnson Controls to invest S$60m expanding Singapore data centre hub. Johnson Controls plans up to **S$60m over five years** to expand its Singapore Innovation Centre, lift engineering headcount to **90–100**, and focus on **advanced cooling and automation** for AI-driven data centres; includes **prototype development/testing** with universities/industry partners and deployment of **OpenBlue** and **Cooling-as-a-Service** across APAC.

Americas (people / platform execution)

- **Ops/services leadership:** Salute appoints Robert Heikaus as MD Americas for data centers. Appointment of **Robert Heikaus** as Managing Director, Americas (mission-critical background including **CBRE GWS** and **IBM**).

Power and grid / interconnection highlights

Middle East (UAE)

- **Firming capacity explicitly tied to data centres:** TAQA, EWEC close AED 3.6bn Al Dhafra 1GW plant
  - **Size/capex:1 GW** gas turbine; **AED 3.6bn**.
  - **Contracting/tenor:24-year PPA** (signed April).
  - **Financing:** **~85% debt-financed** via a consortium of local/international banks.
  - **Strategic frame:** positioned to supply **dispatchable power** for data centres and support the **UAE National Strategy for Artificial Intelligence 2031**; described as part of a broader

AED 36bn investment plan with Masdar (renewables + storage expansion).

India

- **Grid stability toolkit for renewables + storage (relevance for data-centre-adjacent BESS and grid upgrades):**India examines grid-forming inverters to bolster renewable integration
  - Grid-India discussion paper recommends **phased adoption** of **grid-forming (GFM) inverter** capability as India targets **500 GW non-fossil** capacity.
  - Simulations (Rajasthan focus) indicate **GFM outperforms grid-following inverters during disturbances**.
  - Recommendation: **BESS above 50 MW** to include **GFM capability**, plus **grid code updates** and **pilot projects**.

United States

- **Reliability and affordability flagged amid hyperscale concentration:**Virginia urged to pause hyperscale data center approvals references a warning to **FERC** about reliability/affordability risks.

Policy / regulation / permitting

United States (state and city-level scrutiny)

- **Virginia (approvals + incentives under review):**Virginia urged to pause hyperscale data center approvals
  - Call for a pause on approvals and a **transparent plan** covering grid, water, air, and community impacts.
  - Incentive magnitude highlighted: data centre **sales tax exemption cost $1.6bn in FY2025**.
- **Detroit, Michigan (health-linked permit conditions):**Detroit must require health-protective data center approvals
  - Advocates for **health impact assessments**, **24/7 clean energy procurement tied to approvals**, **closed-loop cooling**, **strict diesel testing**, and **fence-line monitoring** as permit requirements.
- **Maine (local transparency / siting pushback):**Maine communities urged to scrutinize AI data center proposals
  - GrowSmart Maine released a **community guide** and urged towns to demand transparency; notes **protests in Lewiston** regarding a proposed AI data centre at the

Bates Mill complex ahead of a **Dec. 16, 2025** city council vote.

Sustainability framing (operational and compliance risk)

- **Energy + e-waste as constraints on growth:** Data center growth raises energy and e-waste sustainability concerns
  - Cites US expansion with **1,240** data centres built/approved by end-2024 and notes **Virginia data centres used ~26% of electricity in 2023**.
  - Highlights global e-waste volumes (**62m tons in 2022**) and claims generative AI could add **1.2–5m tons annually**.
  - Notes Illinois bills **H.B. 3758 / S.B. 2497** targeting **15 GW** of energy storage and virtual power plant programs.

AI infrastructure, networking, and data-centre hardware implications

NVIDIA/Dell platform updates (density, networking, and inference optimization)

- **Next-gen AI racks and high-speed fabrics announced by a major OEM:** Dell and NVIDIA unveil next-gen AI infrastructure and networking
  - PowerEdge servers integrated with **NVIDIA Vera Rubin NVL72** (claimed **3.6 exaflops** and **75 TB memory**).
  - Support for **HGX Rubin NVL8** (claimed ~**400 petaflops**), with **BlueField-4 DPUs** and **800 Gb/s ConnectX-9**.
  - Networking: PowerSwitch with **NVIDIA Spectrum-6** (claimed **102.4 Tb/s** switching; up to **512×800G** CPO ports).
- **Inference performance lever (KV cache offload):** Dell and NVIDIA advance KV Cache with BlueField-4 CMS
  - KV Cache offloading for LLM inference combining **NVIDIA BlueField-4** with Dell storage (PowerScale, ObjectScale, Project Lightning).
  - Dell claims up to **19×** improvement in **Time to First Token** and up to **5.3×** higher **queries per second** using its KV cache offload solutions.
- **Scaled reference design direction:** NVIDIA launches Rubin platform and DGX SuperPOD scale-out
  - Introduced **Rubin platform** (codesigned stack of six chips) and Rubin-based **DGX SuperPOD** configs (DGX Vera Rubin NVL72 and DGX Rubin NVL8).
  - Claimed performance up to **28.8 exaflops FP4**; availability indicated for **2H this year**.

- **Security/acceleration integrated into validated stacks:**NVIDIA integrates BlueField cybersecurity into Enterprise AI Factory
  - Enterprise AI Factory validated design expanded to include **NVIDIA BlueField** cybersecurity and infrastructure acceleration; validated partners include **Armis, Check Point, F5, Fortinet, Palo Alto Networks, Rafay, Red Hat, Spectro Cloud, Trend Micro**.

Memory and component roadmap

- **New memory form factor positioned for AI data centres:**Samsung unveils SOCAMM2 LPDDR5 memory for AI data centers
  - Samsung introduced **SOCAMM2** (LPDDR5-based **CAMM2** module), claiming up to **2× DDR5 bandwidth** with materially lower power.
  - Notes **JEDEC standardized CAMM2** features including ECC; **SK Hynix** pledged support; expected launch around **Q2 2026** alongside Nvidia's **Vera Rubin** platform.

2-line close

Compute, cooling, and power stacks are being designed and financed together—vendor roadmaps and utility-grade generation are moving in lockstep.
Local permitting, incentive scrutiny, and grid-stability requirements are increasingly the gating items for hyperscale delivery timelines.

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