US Data Center Daily Briefing

January 09, 2026

KEY THEMES

- Utilities shifting new generation costs to data centres (take-or-pay, long contracts)
- US federal push to accelerate data-centre permitting and brownfield reuse
- European data-centre ABS/CMBS issuance pipeline (€3–€5bn)
- Interconnection and transmission buildouts remain gating items (UK Gate 2, US 115-kV line)
- Rising local opposition and environmental scrutiny for large-load power projects
- Sovereign AI strategies driving domestic compute and infrastructure programs
- Market outlook calls for large capacity and financing ramp (to ~200GW by 2030)

Data centres & digital infrastructure briefing (Global) — 9 Jan 2026 (UTC)

Top news (what matters most today)

1. **Utilities are tightening terms for large-load connections (US)**: FPL outlines new large-load rates to manage data center growth requiring data centers to fund **100% of new generation**, accept **minimum take-or-pay demand charges**, post **strict collateral**, and sign a **20-year minimum contract**.
2. **Federal permitting is being pushed faster for large data centres (US)**: Federal push to speed data center permitting, brownfields via **E.O. 14318**, directing agencies to streamline **NEPA** and expedited approvals for "Qualifying Projects," and asking EPA to identify **brownfield/Superfund reuse** opportunities and issue guidance within **180 days**.
3. **More project-level securitization is coming to European campuses (Europe)**: European data centre securitizations poised to surge in 2026 with at least **five issuers** planning **ABS/CMBS** in 2026, targeting **€3–€5bn** total proceeds, including deals linked to **CyrusOne (KKR-backed)**, **Stack Infrastructure (Blue Owl-owned)** and **EdgeConneX (EQT-backed)**.

Key deals, financings & corporate moves

Europe

- **Capital markets / refinancing**: European data centre securitizations poised to surge in 2026
  - 2026 pipeline: **≥5** data-centre campus securitizations (ABS/CMBS), **€3–€5bn**.

- Context flagged in the story: AI demand growth, with risks cited around **energy**, **regulation**, and **obsolescence**.

India

- **Early-stage "compute infrastructure" venture funding**: TakeMe2Space raises $5M to build orbital AI data centre
  - **$5m seed** led by **Chiratae Ventures** (with Artha Venture Fund, SeaFund, Unicorn India Ventures).
  - Plan: expand in-orbit AI compute constellation to **six satellites (~5 kW)**; commercial offer cited as **$2 per minute** via "OrbitLab."

US (public company / investor activity)

- **Bitcoin mining / HPC hosting operator visibility**: Cipher Mining to Participate in Investor and Industry Conferences
  - Conference schedule includes Needham Growth (Jan 13, 2026), Jefferies Power/Energy/Clean Energy & Utilities (Mar 2, 2026) and Morgan Stanley TMT (Mar 3–5, 2026).

Projects & capacity pipeline (data centres and adjacent infrastructure)

United States

- **Michigan (Allen Park) – proposed data centre**: Allen Park proposing 26 MW data center for 2027
  - Developer: **Solstice Data**.
  - Specs: **45,000 sq ft**, **26 MW**, **closed-loop cooling**, **12 generators**.
  - Timing: targeted opening **Q1 2027**.
  - Power: intends to enroll in **DTE's MI Green Power Program**.
  - Local process: Planning Commission to consider at **Jan. 8** meeting; local protest cited in the story.
- **Pennsylvania (Homer City site) – power plant tied to a large data centre**: Groups appeal permit for 4.4 GW plant powering data center
  - NGOs (Clean Air Council, PennFuture, Sierra Club) appealed a **DEP permit** for a proposed **4.4 GW natural gas plant** at the former Homer City coal site, described as intended to power a large data centre.

United Kingdom

- **Grid-queued capacity earmarked for data centres + solar**: Orrön secures 2.9GW UK grid connections for projects
  - Secured **Gate 2** grid connections for **six** UK projects totaling **2.9 GW**: **1.8 GW solar** and **1.1 GW data centre**.
  - Next step: expects **binding offers and connection dates in Q3 2026**.

Northeast US (edge / micro data centres)

- **Micro edge deployments**: Datavault AI expands IBM SanQtum AI edge deployments in Northeast
  - Datavault AI plans to deploy agents within **IBM-powered SanQtum AI micro edge data centers** operated by **Available Infrastructure**.
  - Locations: **New York** and **Philadelphia**.
  - Scale-up timing: planned to operate at scale in **Q1 2026**, with intent to expand to additional metros.

Power, grid & interconnection highlights

United States

- **Florida – "build-your-own-power" contracting model for large loads**: FPL outlines new large-load rates to manage data center growth
  - New large-load rates require data centers to pay **100% of new generation costs**.
  - Commercial structure: **minimum take-or-pay** demand charge + **strict collateral** + **20-year minimum contract**.
  - Stated purpose: protect existing customers from subsidizing large-load projects.
- **Washington State – transmission and substation expansion**: Douglas County PUD clears SEPA for 9.8-mile 115-kV line and substation expansion
  - Build: **9.8-mile, 115-kV** line from **Lone Pine Substation** to **O'Malley Substation**.
  - Expand: O'Malley substation footprint from **0.15 to 1.4 acres**.
  - Timeline: road work **winter/spring 2026**; line construction **fall 2026–spring 2027**; substation expansion complete **2028**.

India (transmission buildout themes relevant to data centre siting)

- **Grid expansion + digitalisation**: POWERGRID outlines transmission digitalisation and renewables integration plans
  - Reported footprint: **287+ substations** and **550 GVA** transformation capacity.
  - Forward plan: additional **HVDC** and **800 kV substations** over the next five years; examples include a **765 kV digital substation at Navsari**.
  - Also cited: **dynamic line rating**, **digital twins**, **17 STATCOMs**, cybersecurity initiatives, and AI/ML workforce training.
- **Execution risk and delays**: India's transmission sector: growth, challenges, and future roadmap
  - Delay statistic cited: **~90–95%** of projects delayed at least **one year**.
  - Typical completion cited: **~4 years** vs target **<3 years**.

Policy, regulation & compliance

United States

- **Permitting acceleration (federal)**: Federal push to speed data center permitting, brownfields
  - E.O. **14318** aims to streamline reviews for large data centres and related supply chain projects.
  - Includes direction to expedite **NEPA** processes, identify **brownfield/Superfund** reuse opportunities, and develop EPA guidance within **180 days**.
  - Also calls for **programmatic ESA consultation** for common construction activities over the next **10 years**.
- **AI strategy framing (White House)**: White House outlines AI strategy focused on infrastructure and deployment
  - Strategy priorities described: domestic infrastructure, removing regulatory barriers, and accelerating global deployment.
  - Notable signal for data centres: urging companies to **finance their own power**.
- **State/local scrutiny of resource impacts**: Arizona environmental groups push utility and data center oversight

- Coalition urges legislative action on **energy use**, **data centers**, **water protections**, and **environmental justice**; Democrats said to be introducing legislation this year.

- **Cyber/operations risk (backup infrastructure)**: Veeam patches four Backup & Replication vulnerabilities in v13
  - Patch **v13.0.1.1071** addresses four CVEs that could allow privileged roles to gain **RCE** or root-level writes; immediate patching advised.

Multi-country / strategic industrial policy

- **Sovereign AI buildout is becoming operational**: Five countries operationalize sovereign AI strategies and infrastructure
  - Countries/blocks referenced: **EU, India, Japan, South Korea, Brazil**.
  - Examples cited: India funding **10,000+ GPUs**; EU launching **AI Factories**; Japan offering **billions** in subsidies for cloud programs; Brazil anchored by **Santos Dumont** and advancing **Bill 2338/2023**.

Market signals to watch

- **Demand/capacity outlook and financing volumes**: JLL projects up to $3 trillion data centre investment surge
  - Forecast: up to **$3tn** global data-centre investment over five years; capacity rising from **103 GW (2024)** to **200 GW (2030)**.
  - Composition estimates: **AI workloads ~50% of capacity by 2030**; **$870bn** of debt financing; hyperscalers allocating **$1tn** (2024–2026).

- **Technology roadmap (capex and power efficiency implications)**: NVIDIA unveils Rubin full-stack AI platform for data-centers
  - NVIDIA says Rubin partner products expected **H2 2026**, claiming up to **10x** inference token cost reduction and up to **5x** power efficiency gains.

2-line close

Cost allocation and permitting rules are moving quickly in the US, while Europe is setting up a larger securitization channel for data-centre campuses. Grid delivery timelines and interconnection access remain a defining constraint in multiple markets.

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