US Data Center Daily Briefing

January 12, 2026

KEY THEMES

- Texas/ ERCOT interconnection queue dominated by data centres
- Grid and water constraints emerging as investable bottlenecks
- Hyperscaler capex signals: $40bn Texas AI build-out
- Advanced nuclear positioned for large-load supply (Meta–TerraPower)
- Policy response and permitting/compliance focus (Texas SB6)
- Geopolitical/sovereignty push toward self-hosted/open-source public IT (Scotland)
- US climate posture uncertainty potentially affecting long-term decarbonisation pathways

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Global data centres & power briefing (UTC 2026-01-12)

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

Top news (3)

- Texas' data centre pipeline is testing grid and water limits: ~400 planned or operating sites; ERCOT has **200+ GW** of interconnection requests, **~73% attributed to data centres**. See: Texas faces power and water risks from data center boom.
- Meta is linked to a major nuclear build-out concept via an agreement with TerraPower: **up to eight advanced nuclear reactors** proposed in the US. See: Weekly ESG roundup: major climate, finance, and energy moves.
- Scotland debate: calls for reducing reliance on US technology and fossil fuels, including migrating public-sector IT toward open-source/self-hosted clouds and accelerating decarbonisation. See: Scotland urged to reduce dependency on US and act.

Key deals & projects

United States

- Meta–TerraPower advanced nuclear reactors: ESG Today reports an agreement for TerraPower to build **up to eight advanced nuclear reactors** in the US (positioned in the roundup as a major ESG/energy move relevant to large-load growth).

- Google AI data centres in Texas: referenced investment of **$40 billion** in new AI data centres in Texas.

Power, grid & interconnection highlights

Texas (ERCOT)

- ERCOT interconnection queue dominated by data centres:
  - **200+ GW** of interconnection requests reported.
  - **~73%** of those requests reportedly from data centres.
- Grid strengthening funding: article references a **federal contribution of more than $60 million** to strengthen the grid.
- System constraints flagged: the same report highlights **power demand growth** and **water concerns** tied to ~400 planned/operating data centres in Texas.

Policy & regulation

Texas (state)

- Senate Bill 6 requirements: cited as part of the policy response framework to data-centre-driven load growth (details not specified in the story summary).

United States (federal / international climate posture)

- US exit from major international climate organizations: reported as a Trump administration move in ESG Today's roundup; relevant for long-duration decarbonisation policy certainty and potential knock-on effects for power procurement narratives.

Scotland (devolved powers / public-sector IT)

- Calls to reduce dependence on US tech and fossil fuels: recommendations include migrating public-sector IT to **open-source or self-hosted clouds**, limiting US military use of Scottish airports, using compulsory purchase powers, publishing US-regime assets in Scotland, and accelerating decarbonisation.

2-line take

Large-load growth remains a grid-and-water story in key US markets, with ERCOT queue scale and state requirements increasingly central. In parallel, nuclear and sovereignty-driven IT strategies are resurfacing as potential pillars of long-term capacity and resilience planning.

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