US Data Center Daily Briefing

January 13, 2026

KEY THEMES

- Hyperscalers contracting nuclear power for AI load growth
- Mega-campus expansion in the US (902 MW Wisconsin)
- Renewables-plus-storage procurement ramps (Rajasthan 2.45 GW + 6.4 GWh BESS)
- State-level political pushback on data centre growth (Virginia, Montana)
- Geopolitics and supply-chain alliances for AI infrastructure (Pax Silica)
- Rising rack power densities drive liquid cooling and infrastructure redesign
- Growing role for C&I storage products positioned for data-centre reliability

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Data centres & power infrastructure briefing (Global) — 13 Jan 2026 (UTC)

Top news (3 developments)

1. **Hyperscalers move to long-dated nuclear power**

- Meta secures nuclear power deals to fuel AI operations: Meta agreed to buy **2,600 MW** from **Vistra's three nuclear plants** over **20 years** (including **433 MW** of increased generation) and to extend licenses. Meta also contracted **1,200 MW from Oklo by 2034** and **690 MW from TerraPower** for low-carbon power for AI operations. Vistra says its project will take **nine years** to build and create **~3,000** project-related jobs.

2. **Large-scale US campus capex continues to concentrate**

- Global surge in data center projects and major investments: Vantage Data Centers broke ground on the **902 MW "Lighthouse" campus in Wisconsin**, backed by a **$15bn investment** tied to **Oracle and OpenAI's Stargate initiative**.

3. **Political/regulatory pushback on data centre growth intensifies in US states**

- Virginia hosts Data Center Reform Lobby Day on Feb 9, 2026: Environmental groups plan a Richmond "lobby day" urging reforms to limit "unchecked" growth; they cite a **$1.6bn** 2025 **state sales-tax exemption** for data centres and a **Dominion Energy** projection that **residential bills could more than double by 2035**.

Key deals & projects (by region)

North America (US)

- Vantage breaks ground on 902 MW Wisconsin "Lighthouse": **902 MW** campus; **$15bn** investment; linked in the story to **Oracle/OpenAI Stargate**.
- Alphabet to buy Intersect Power for $4.75bn: Deal framed as securing **clean energy** for Alphabet's data centres (no additional structure/timeline provided in the story).

India

- Reliance to invest Rs 7 trillion in Gujarat clean energy: **Rs 7 trillion** plan over **five years**; includes a "world-scale" clean energy ecosystem in **Jamnagar**, **multi-gigawatt solar in Kutch**, **India's largest AI-ready data centre**, and a **Jio AI platform in local languages**.

Southeast Asia

- Sertis and DCI launch PT Sertis Teknologi Indonesia JV: Joint venture to deploy Sertis AI/data products in Indonesia using **DCI Indonesia's on-shore data centre infrastructure**; DCI noted as **Tier IV certified** and positioned for local security/compliance/governance requirements.

Middle East / Gulf

- Gulf nations join Pax Silica to secure AI supply chains: US adding **Qatar** (expected to sign **Jan 12, 2026**) and the **UAE** (**Jan 15, 2026**) to the Pax Silica initiative for high-purity silica/semiconductors/AI infrastructure supply chains. Story highlights potential financing firepower from sovereign funds (**QIA ~ $524bn; UAE funds > $1tn**) and references prior large commitments (including **Stargate $500bn**, **QIA-Brookfield $20bn JV**, and **MGX $100bn with BlackRock and Microsoft**).

Power, grid & interconnection highlights

Firm low-carbon power procurement

- Meta nuclear contracting (Vistra/Oklo/TerraPower): Long-duration contracting across existing nuclear output (Vistra) plus planned new nuclear capacity (Oklo/TerraPower) to support AI load growth; explicit volumes include **2,600 MW** (Vistra), **1,200 MW by 2034** (Oklo), and **690 MW** (TerraPower).

Utility-scale renewables + storage (tenders)

- Rajasthan 2.45 GW solar-plus-BESS Pugal tender: Tender issued for **2,450 MW solar** paired with **1,600 MW / 6,400 MWh BESS** at **Pugal Solar Park**; bids due **9 Mar 2026**. Structure and

milestones:

- Lot 1: **2,000 MW** + **1,320 MW / 5,280 MWh** BESS
- Lot 2: **450 MW** + **280 MW / 1,120 MWh** BESS
- Power sale/contracting: supply via **RUVITL**, which will enter **PPAs** for **JVVNL, AVVNL, JDVVNL**
- Delivery requirements: **civil works by Dec 2026**; **power evacuation by Jul 2027**

Regional grid planning (Asia)

- IRENA says US exit won't hit Southeast Asia renewables support: IRENA stated it will seek other resources to fill any gap from potential US withdrawal; discussion referenced **ASEAN power grid** planning and a **2025 ASEAN subsea-cable framework**.

Behind-the-meter / C&I storage product (data centre reliability angle)

- Hoymiles launches HoyUltra 2 liquid-cooled C&I storage system: **261 kWh per unit**, scalable to **16 units in parallel** (**125 kW–2 MW**); up to **90.3%** max round-trip efficiency; includes cloud-to-edge EMS with **<100 ms fault alerts** and a "seamless transfer" feature positioned for data centre reliability.

Policy, regulation & permitting signals

United States — state-level backlash and potential rule changes

- Virginia "Data Center Reform Lobby Day" (Feb 9, 2026): Activists targeting state legislative reforms; narrative links data centre incentives (sales-tax exemption) and cost-of-service outcomes (bill increases) as political pressure points.
- New environmental battles in Chesapeake Bay states: Virginia is described as having higher odds of passing previously vetoed measures under a new Democratic governor; story specifically flags proposals to **regulate data centres' energy and water use** and raise utility-scale solar requirements.
- Montana candidate calls data centres an environmental catastrophe: Candidate proposes making companies pay for **energy/grid upgrades**, produce renewables, and disclose deals; references **Montana's 2025 House Bill 424** tax breaks and a claim that data centres could **double Montana's energy use**.

United States — federal regulatory approach

- Trump's EPA plans to ignore health effects of air pollution: Reported EPA plan to stop assigning monetary value to human health when assessing ozone/PM2.5 regulations; story

notes potential implications for how industrial power choices are evaluated and cites a data-centre-related example involving **unpermitted natural-gas turbines**.

Geopolitics / supply chain alignment

- US to invite India to join Pax Silica AI alliance: Invitation positioned around securing high-purity silica, semiconductor and AI infrastructure supply chains to reduce dependency on China; India's formal response described as pending.

Technology & operations notes (capex/efficiency implications)

- Liquid cooling risks and solutions for AI data centers: Schneider Electric flags deployment risks (corrosion, warranty/SLA complexity, and lost energy savings) for direct liquid cooling; cites GPU power growth to **1,000–1,400 W per chip**, current rack densities of **142 kW**, and a view that **1 MW per rack** is "on the horizon."
- NVIDIA unveils Vera Rubin rack-scale AI factory platform: NVIDIA announced "Vera Rubin" and the **NVL72** system (**72 Rubin GPUs, 36 Vera CPUs**), plus DGX SuperPOD blueprints (example: **eight NVL72 systems → 28.8 exaflops, 600 TB memory**) aimed at production inference and lowering token costs.
- HPE unveils Aruba CX 6000 and Nonstop upgrades: New Aruba CX 6000 switches (up to **104 Gbps** and **77.3 Mpps**, PoE models **370W/740W**) and Nonstop Compute upgrades expanding clustering from **255 to 4,000 nodes**.

2-line wrap

Deal-making is increasingly shaped by (i) the need to lock in durable power and (ii) local acceptance constraints around growth, costs, and environmental impacts.
At the same time, hardware roadmaps imply higher per-rack power and cooling complexity, which will keep stressing siting, grid access, and facility design choices.

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