US Data Center Daily Briefing

January 23, 2026

KEY THEMES

- 560MW Finland campus pipeline emerges
- UK planning approval risk for 90MW site
- Virginia proposes SCC approval for >25MW loads
- US market shift: power delivery/execution is the constraint
- Behind-the-meter solar+storage pitched to unlock UK distribution capacity
- PJM/Pennsylvania debate on taxing data centers for grid upgrades
- Regulatory approvals vs litigation risk in Arizona
- India mega-investment MoUs (Mumbai region, Uttar Pradesh compute hub)
- LDES cost-down expectations and C&I BESS product updates
- Flash storage supply constraints affecting data center capex/ops

Global Data Centres & Digital Infrastructure Briefing (UTC 2026-01-23)

Top news (3)

- **Finland: a very large new pipeline signal near Helsinki.** DayOne plans 560 MW data center project near Helsinki — early-stage plan for a phased campus in Klaukkala, Nurmijärvi (~30 km north of Helsinki) with **up to 560 MW** of total grid power potential. DayOne has a **site agreement with Fortum** to support zoning and grid connection planning; announcement follows **>$2bn Series C equity** and references an existing **$1.4bn Lahti hyperscale project** plus an **up-to-$1.2bn mezzanine facility (Dec 2025)**.
- **UK: planning risk increases for a large 90 MW project.** UK says error in approving 90 MW Woodlands Park data centre — government accepted a “serious logical error” and that permission **should be quashed**; developer **Greystoke Land** will defend. Legal challenge brought by **Foxglove** and **Global Action Plan** after Angela Rayner overruled Buckinghamshire Council’s refusal.
- **US (Virginia): potential new approvals gate for large-load facilities.** Virginia group urges support for HB155/SB619 to oversee data centers — proposal would require new “high-load” facilities **>25 MW** to obtain an **SCC Certificate of Operation** assessing ratepayer, grid reliability, and environmental impacts; PECVA cites **500+ existing data centers** and typical new proposals of **60–90 MW**.

Key deals & projects (by region)

Europe

- **Finland (Helsinki metro): hyperscale campus concept with Fortum support.** DayOne plans 560 MW data center project near Helsinki — up to **560 MW** grid power potential (phased); **Fortum site agreement** for zoning and grid connection planning.
- **UK (Buckinghamshire): Woodlands Park 90 MW project faces court-driven uncertainty.** UK says error in approving 90 MW Woodlands Park data centre — permission expected to be quashed due to acknowledged error; developer defending.

North America

- **US (market view + services M&A): execution risk now the constraint.** CBRE: Power Constraints Redefine 2026 U.S. Data Centers — CBRE says developers are prioritising sites able to support **300 MW+ deliveries within ~36 months**; **preleasing expected mid-70%**. CBRE also acquired **Pearce Services** for **~$1.2bn + up to $115m earn-out**; Pearce projected **> $660m revenue** and **> $90m EBITDA** in 2026.
- **US (Arizona): power supply agreement upheld for proposed data center.** Regulators keep TEP data center energy agreement in place — Arizona Corporation Commission said its **Dec 2025 approval** of **Tucson Electric Power**'s Energy Supply Agreement for **Beale Infrastructure** remains in place; separate court action seeks to void earlier rezoning.

Asia

- **Thailand (cloud region capex): major in-country build.** Google Cloud launches $1B Thailand cloud region in Bangkok — **$1bn investment** for a Bangkok cloud region; Google estimates **THB 1.4tn (~$41bn)** economic value over five years and **130,000 jobs/year**.
- **India (Mumbai region): long-horizon capital mobilisation for data centres.** RMZ to invest up to $30 billion in Mumbai region — partnership with **MMRDA** and **CIDCO** to facilitate **up to $30bn** investment over **10 years**; includes data centre and commercial projects in **Navi Mumbai starting FY 2026–27**.
- **India (Uttar Pradesh): large AI compute hub MoU (early-stage).** AM Group, Uttar Pradesh sign $25bn AI compute hub MoU — **$25bn** MoU to develop AI compute hub; aims at large-scale compute infrastructure plus skill development and energy-efficient operations.
- **Malaysia (critical power chain partnership): UPS and power management focus.** Bridgenet and Eaton partner to bolster Malaysian data centre infrastructure — collaboration to deliver **UPS, power distribution, monitoring, and lifecycle services**.

Power, grid, and interconnection highlights

Grid capacity and "behind-the-meter" approaches

- **UK: unlocking distribution capacity with local generation + storage.** Masdar and Octopus Energy sign MoUs for UK and Africa — MoUs to unlock **UK distribution network capacity for data centres** using **local solar-plus-storage**; Octopus to use **Kraken** to manage on-site generation, batteries and grid usage.

Storage cost trajectory and equipment signals

- **Long-duration storage cost-down expectations (relevance to firming high-load growth).** EPRI study finds LDES costs could fall ~37% by 2030 — EPRI finds average LDES costs could decline **~37% by 2030**; examples include **100 MW / 10-hour intraday electrochemical: $244–358/kWh** and **10 MW / 100-hour multi-day: $26–38/kWh**.
- **C&I BESS product update (applicable to on-site resilience / peak management).** Hoymiles launches HoyUltra 2 liquid-cooled ESS for C&I — **261 kWh per unit**, parallel scalable; claims include **90.3% round-trip efficiency**, operation to **50°C**, certifications **IP55** and **C5**.

Policy and regulation watch

United States

- **Virginia: potential new approval regime for large-load developments.** Virginia group urges support for HB155/SB619 to oversee data centers — would require **SCC Certificate of Operation** for new facilities **>25 MW**; framed around ratepayer, reliability, and environmental impact assessment.
- **Pennsylvania / PJM: cost-allocation and ratepayer protection debate.** Pennsylvania advocates urge taxing data centers to lower bills — consumer advocates and PUC chair urge taxing data centers so ratepayers don't fund grid upgrades; PJM warns peak loads will rise significantly over 15 years; discussion includes a **PJM price cap extension** projected to save **~$27bn** region-wide over two years (including **$5bn for Pennsylvania**).
- **Arizona: regulatory approval stands (but parallel legal risk remains).** Regulators keep TEP data center energy agreement in place — ACC approval remains effective after rehearing window lapsed; separate court challenge targets rezoning.

United Kingdom

- **Planning permission vulnerability for a 90 MW scheme.** UK says error in approving 90 MW Woodlands Park data centre — acknowledged government error creates a precedent risk for other contested approvals.

India

- **Rajasthan: improved supply resilience option for high-load users (but at customer cost).** Rajasthan allows dual power supply for high-load consumers — rules allow HT/EHT consumers to take **dual feeder supply** (simultaneous or standby). Consumers bear **full extension costs** and face **charging of double the applicable plant cost**; tariffs to be decided separately.

Technology and supply-chain signals (relevant to capex/ops risk)

- **Storage supply constraint and pricing pressure.** Dell PowerScale scales amid flash supply constraints for AI — cites reported flash price increases of **60–120%** and expects **HDD:all-flash cost ratio** to shift from **1:4 to 1:10** this year; highlights auto-tiering across NVMe/hybrid/HDD.
- **French public funding for AI interconnect R&D.** France funds CanopAI photonic interconnects for AI datacenters — **Scintil Photonics, Presto Engineering, and CEA-Leti** awarded funding under **France 2030 i-Demo (Bpifrance)** to develop photonic ICs and dense optical GPU-to-GPU interconnects; aims to prepare for **300 mm wafer** manufacturing.

Two-line close

Large-load development continues to scale, but project viability is increasingly shaped by permitting, grid access, and cost-allocation politics.
Behind-the-meter generation/storage and execution capability (delivery timelines, services depth) are becoming core differentiators across markets.

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