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Data Center Briefing

January 28, 2026

Global

Key themes:
Meta–Corning $6bn fibre supply for US data centres; AI mega-funding driving compute procurement and build-outs; New OCI cloud region in Nairobi via iXAfrica; US long-duration storage milestone: 1,200MW Goldendale pumped hydro licensed; Behind-the-meter/adjacent power models: P3 solar+battery for hyperscalers; Regulatory throughput risk: EPA TSCA fast lane for data-centre chemicals; BEAD funding terms dispute adds uncertainty for broadband deployment contracts; Equipment pull-through: Indian transformer export order tied to US data centre project; BESS scaling: Ford plans ≥20 GWh annual capacity by late 2027

Global data centres & digital infrastructure briefing (UTC 2026-01-28)

Top news (3)

- **Meta locks in fibre supply for US AI data-centre growth:** Meta signed a **$6bn multi-year** agreement with Corning for optical fibre/cable/connectivity, paying for fibre **through 2030**. The deal anchors Corning's **Hickory, North Carolina** manufacturing footprint, with Meta positioned as an anchor customer. (Meta's $6B fiber deal with Corning expands US data centers)
- **Large-ticket AI capital continues to pull through compute build-outs:** SoftBank completed a **$41bn** investment in OpenAI (end-Dec), taking OpenAI valuation to **$500bn**; OpenAI then contracted **Cerebras for $10bn in compute** (two weeks later). The same report notes **>$61bn** spent building hundreds of AI data centres worldwide. (SoftBank completes $41 billion OpenAI investment, fueling AI expansion)
- **Kenya hyperscale signal:** iXAfrica will host **Oracle Cloud Infrastructure's new public cloud region in Nairobi** as colocation/host partner. The site is positioned as East & Central Africa's largest hyperscale,

AI-ready facility, with **construction, power and connectivity in advanced stages**. (iXAfrica and Oracle to launch Nairobi OCI public region)

Key deals & projects (by region)

North America

- **Fibre / supply chain**
    - Meta–Corning: **$6bn** fibre/cable/connectivity supply agreement (US data-centre expansion; payments through **2030**). (Meta's $6B fiber deal with Corning expands US data centers)
- **On-site / adjacent power infrastructure for data centres**
    - Exowatt launched **ExoRise**, offering turnkey **land + P3 solar + battery** energy infrastructure for hyperscale data centres across the **US Southwest**. Exowatt is Miami-headquartered, backed by Sam Altman and a16z, and raised **$70m** last year; expects first ExoRise pilot **online by end of the year** and cites a backlog of **>90 GWh** of signed customer demand. (Exowatt launches ExoRise to power hyperscale data centers)
- **Data-centre operations / sustainability signalling**
    - Prime Data Centers: Dallas **20MW** and Sacramento **26MW** facilities earned **EPA Energy Star** certification (top-25% energy performance). Prime reported **83% construction waste diversion in 2024** and targets **HVO** as main backup-generator fuel by **2030**. (Prime Data Centers' Dallas and Sacramento Earn Energy Star)

Europe

- **Municipal fibre build**
    - Czech Republic: Ústí nad Labem issued an open tender to build **passive optical routes** connecting municipal organisations to Metropolnet's existing optical route. Estimated value **CZK 55,000,000 (ex VAT)**; contract term **15/04/2026–31/10/2027**; tender deadline **04/03/2026**; award on **lowest bid price (ex VAT)**. (Usti nad Labem tender for passive municipal optical network)
- **European supercomputing ecosystem**
    - Luxembourg: LuxProvide joined Gaia-X, bringing experience around the **MeluXina EuroHPC supercomputer**; messaging emphasised trusted and sustainable federated digital infrastructure. (Gaia-X welcomes LuxProvide to European supercomputing ecosystem)
- **UK research compute visibility**
    - UK: the Prince of Wales visited the National Composites Centre and viewed **Isambard-AI**, a supercomputer hosted at NCC with the University of Bristol (use cases cited: climate modelling, drug

development, health resilience). (Prince of Wales visits NCC to view UK innovation)

Africa

- **Cloud region / colocation**
  - Kenya: iXAfrica to host Oracle OCI public region in Nairobi; project described as hyperscale and AI-ready with power/connectivity progressing. (iXAfrica and Oracle to launch Nairobi OCI public region)

Asia (incl. India, ASEAN)

- **Grid equipment pull-through from US data-centre build**
  - India: CG Power reported quarterly PAT **₹284 crore** (+19% YoY) and revenue **₹3,175 crore**; unexecuted order backlog **₹15,753 crore** (as of Dec 31, 2025). It also secured a **₹900 crore export order** for power transformers from Tallgrass Integrated Logistics Solutions for a **US data centre project**, to be executed over **12–20 months**. (CG Power reports FY26 quarter profit rise and data centre order)
- **Macro/FDI framing for the region**
  - ASEAN: DBS Research estimates the ASEAN data-centre market at **~$11–13bn in 2024**; ASEAN has **~390 data centres (~1.7GW capacity)** and is now fifth globally, with AI-led demand expected to drive data-centre FDI and hardware manufacturing growth. (DBS: AI expansion to cushion ASEAN economy, boost data centres)

Power & grid / interconnection highlights

United States (storage & firming)

- **Long-duration storage permitting milestone**
  - FERC granted a **40-year license** to Rye Development and Copenhagen Infrastructure Partners for the **1,200MW Goldendale pumped hydro** project in Washington. Rye projects **>3,000 construction jobs** and **>$10m/year** to Klickitat County. (FERC approves 1,200MW Goldendale pumped hydro license; thermal, geothermal advances)

Storage market direction (global)

- Wood Mackenzie expects the energy storage market to continue expanding into 2026 after **106GW installed in 2025** and flags “storage for data centres” as one of the identified themes; it also references a **Peak Energy–Jupiter Power sodium-ion** supply agreement (**725MWh initial + 4GWh option; up to 4.75GWh**). (Wood Mackenzie identifies five energy storage trends for 2026)
- Automaker entry into BESS: Ford appointed Lisa Drake as President of Ford Energy to launch a BESS business, targeting initial online capacity **mid-2027** and **≥20 GWh annually by late 2027**, with planned

investment of **~$2bn over the next 2 years**. (Ford appoints Lisa Drake to lead Ford Energy BESS)

Urban heat / potential heat reuse narrative (UK)

- E.ON promoted district "Heat Zones" to capture local and waste heat, citing London as able to meet **38%** of heating demand from recoverable waste heat; the **Citigen** system in the City of London combines waste heat, heat pumps and thermal storage and "cuts emissions by roughly **5,000 tonnes/year**." (Heat zones: future of affordable secure sustainable urban heating)

Policy & regulation

United States

- **Chemicals approvals as a potential delivery bottleneck (and attempted fast lane):** EPA created a priority review lane to accelerate TSCA reviews for chemicals used in data centres (aligned with a Sep 2025 Executive Order). Context: **456 active PMN submissions** (Jan 2026) and a GAO finding that EPA met the 90-day PMN deadline **<10%** of the time; House Republicans issued draft TSCA reform legislation **Jan 16, 2026** with hearings **Jan 22**. (EPA prioritizes data center chemical reviews amid TSCA debate)
- **BEAD funding mechanics dispute (Starlink):** SpaceX asked state broadband offices to adopt a contract rider paying **50%** of BEAD awards upon certification and the rest in equal quarterly installments over **10 years**, and setting an **$80/month** low-cost service. SpaceX has been awarded **>464,000 locations** and **~$636m** under BEAD; NTIA told states **not to sign** pending further guidance. (SpaceX seeks BEAD grant payouts in equal installments)

Technology & architecture notes (relevant to capex/opex)

- **In-house accelerators roll into hyperscale regions:** Microsoft announced **Maia 200** inference accelerator (claims **10,145 FP4 TFLOPS** and **5,072 FP8 TFLOPS**, with **216GB HBM**), initially deployed in **US Central (Des Moines)** with rollout to **US West 3 (Phoenix)**. (Microsoft unveils Maia 200 inference accelerator for Azure)
- **High-density cooling direction:** Hybrid cooling (direct liquid + airflow) framed as a practical path as rack densities reach **100–200 kW**; the piece contrasts greenfield liquid-first designs vs. retrofits that can be **30–50% cheaper** and avoid multi-year delays. (Hybrid cooling strategies for AI-driven high-density data centres)

Two-line close

Capital is still concentrating around AI compute and the physical supply chain (fibre, grid equipment, storage), while new cloud regions continue to emerge in underpenetrated markets. Near-term delivery risk is increasingly tied to permitting/reviews and practical infrastructure constraints rather than demand.

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