

US Data Center Daily Briefing

February 14, 2026

KEY THEMES

- Large-load electricity tariffs for data centers
- US decarbonization actions and planned generation/storage build
- Solar and gas build pipelines alongside storage and wind
- GPU platform upgrades driving higher data center compute intensity
- Unified memory architectures enabling faster multiphysics simulation
- UK–Malaysia collaboration on sustainable data centres and digital tech
- Azerbaijan positioning for electricity + fiber + data center corridors

Top news (Global)

- [NCCETC's 2025 Power Decarbonization Annual Review](#) flags **data-center-driven “large-load” electricity tariffs** as a major US trend, alongside big planned additions across solar, gas, storage and wind.
- [Dell and NVIDIA's workstation-to-rack platform push](#) highlights how **rack-scale GPU systems** (GH200/H200/GB200) and unified memory architectures are accelerating multiphysics simulation workloads—tightening the link between AI/HPC demand and data center compute density.
- [Azerbaijan positions itself as a connectivity and AI hub](#) with stated plans spanning **electricity cables, fiber-optics, data centers and AI**, tied to regional corridor development.

Key deals & projects

US: power-market shifts for large loads

- [NCCETC releases 2025 Power Decarbonization Annual Review](#)
 - The NC Clean Energy Technology Center reports **49 states plus Puerto Rico** took **667 actions** on power decarbonization in 2025.
 - The review highlights **large-load tariffs driven by data center growth** as a notable trend to watch for project underwriting and contract structures.

Europe / UK–Malaysia: ecosystem-building for sustainable data centres

- [UK–Southeast Asia Tech Week 2026](#)

- The UK launched a Kuala Lumpur program (11–13 Feb) to deepen digital collaboration with Malaysia, including sessions on **AI, cybersecurity, and sustainable data centres**.
- Program details: **10 UK technology companies** participated; UK partners cited **30,000+ employees** and **combined valuation exceeding £100 billion**; launch of the **ASEAN-UK TradeTech Lookbook**.

Caucasus: connectivity corridor + digital infrastructure intent

- [Azerbaijan president discusses corridors, energy and AI](#)
 - President Ilham Aliyev described Azerbaijan’s ambition to be a **transit and connectivity hub**, referencing the **Zangezur Corridor**.
 - He also referenced plans for **electricity cables, fiber-optics, data centers and artificial intelligence** (no project sizes/timelines disclosed).
-

Power and grid / interconnection highlights

US planned capacity additions (system context for data center supply)

- [NCCETC’s annual review and “50 States of Power Decarbonization”](#) documents planned additions of:
 - **144,405 MW solar**
 - **125,016 MW natural gas**
 - **58,581 MW storage**
 - **58,381 MW wind**
 - For investors, the report’s emphasis on **large-load tariffs** suggests continued evolution of how utilities and regulators price and allocate costs for rapid load growth.
-

Technology & demand drivers (compute intensity)

GPU platforms moving “desktop to rack-scale”

- [Dell and NVIDIA enable full-fidelity multiphysics simulations](#)
 - Dell highlighted **Dell Pro Max workstations** (RTX PRO 6000 Blackwell) and **Dell PowerEdge servers** built around **GH200/H200/GB200** platforms, citing NVIDIA unified memory architectures.
 - Performance claims cited by software partners:

- Ansys: a **2.4-billion-cell simulation** completed in **6 hours** on **320 GH200 GPUs** vs **4 weeks** on a **2,048-core CPU cluster**.
 - COMSOL: **5x or greater** speedups using **cuDSS**.
-

Policy / regulation and market structure

US: growing regulatory attention to large load connections

- [NCCETC's 2025 review](#) underscores that **tariff design for large loads** is becoming a mainstream issue across jurisdictions as data center growth drives demand.
-

Two-line close

Power-market rules for serving very large loads are changing quickly, and investors should expect continued movement in tariff design and procurement pathways.

At the same time, rising GPU-enabled simulation and AI workloads reinforce the need to align compute expansion with credible power and connectivity buildout.

Track any ISO, state, county, or company in the US data center build-out — Telborg tracks power, permitting, new projects and legislation exclusively from trusted sources

Telborg Pro · \$189/mo →

[or book a 20-min call →](#)