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Data Centre Briefing

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Global

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.