US Data Center Daily Briefing

February 15, 2026

KEY THEMES

- Canada–Germany AI cooperation and sovereign tech positioning
- Secure compute infrastructure elevated in public-sector agendas
- Smart-city platform budgets: pilot vs scaled deployments
- Lifecycle budgeting and O&M (10–20% annually) highlighted
- Frankfurt ecosystem focus on regulated deployments and legacy integration

Top news (3)

1. Canada–Germany move to build “secure compute” capacity: Canada and Germany sign AI declaration, launch Sovereign Alliance. The partnership is positioned around expanding secure compute infrastructure, accelerating AI R&D/commercialization, and strengthening talent development.
2. Smart-city digital infrastructure budgets are being framed in clear tiers (pilot to scaled rollouts): Smart City Platform Costs: Pilots, Scale, and Long-term Budgets outlines pilots at **$100k–$500k** and multi-department programs at **$1M–$10M**, with lifecycle budgeting emphasis.
3. Annual O&M expectations are being explicitly benchmarked for smart-city deployments: Practical cost breakdown for developing focused smart city solutions flags ongoing maintenance at **~10–20% per year**, reinforcing the importance of long-term operating budgets alongside initial capex.

Policy, regulation, and public-sector signals

Canada / Germany

- At the Munich Security Conference (Feb 14, 2026), Canada and Germany signed a Joint Declaration of Intent on Artificial Intelligence and launched the Sovereign Technology Alliance.
- Stated focus areas:
  - **Expanding secure compute infrastructure**
  - **Accelerating AI research and commercialization**

  - **Strengthening talent development**
- The initiative builds on the Canada–Germany Digital Alliance announced Dec 8, 2025 (referenced in the same story).

Why it matters for infrastructure investors: The declaration explicitly links national security and industrial policy objectives to "secure compute infrastructure," a framing that can influence future procurement, partnership structures, and location choices for compute-heavy facilities.

Key deals & projects (data centres / digital infrastructure)

Germany (Frankfurt)

- Market landscape / partner ecosystem: Frankfurt's leading AI agencies and data infrastructure partners profiles consultancies and an infrastructure provider in Frankfurt (including **AI Superior, Innowise, T-Systems, and EDGECOM**) and highlights:
  - Deployment in **regulated environments**
  - **Integration with legacy systems**
  - Reference to **modular data centres** (as part of the services/infrastructure ecosystem described)

Note: No discrete financing rounds, site acquisitions, MW announcements, or construction timelines are provided in the stories.

Power, grid, and interconnection highlights

- No grid connection awards, PPA announcements, substation builds, or interconnection queue updates are included in today's stories.

Cost, demand, and unit-economics signals (smart city / edge-adjacent)

Global

- Platform cost tiers (planning and budgeting): Smart City Platform Costs: Pilots, Scale, and Long-term Budgets
  - **Pilots:$100k–$500k**
  - **Multi-department scale:$1M–$10M**

  - Cost categories highlighted include **connectivity, devices, data platforms, integration, O&M, and security**.
- Project sizing in EUR and lifecycle O&M: Practical cost breakdown for developing focused smart city solutions
  - **Small pilots:** from **€30,000**
  - **Large multi-domain initiatives:>€1,000,000**
  - Core components include **sensors, connectivity, platforms, citizen tools, integration**.
  - Ongoing **maintenance:~10–20% annually**.

Investor read-through: These ranges provide a rough guide to the "digital layer" budgets that can sit upstream of edge connectivity and compute needs, with O&M materially affecting total lifecycle economics.

Two-line close

Public-sector coordination around trusted AI and compute is becoming more explicit, which can shape how and where capacity gets built.

Separately, smart-city programs continue to emphasize pilot-led scaling and long-term operating budgets, clarifying the demand-side spend profile for digital infrastructure layers.

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