US Data Center Daily Briefing

February 18, 2026

KEY THEMES

- Full-stack cybersecurity and air-gapped cloud adoption by governments
- AI scaling constrained by infrastructure and energy limits
- Silicon photonics/DWDM co-packaged optics moving toward high-volume production
- Power availability and modular design remain top data centre priorities
- GPU-as-a-Service and data sovereignty shaping African AI infrastructure demand
- Enterprise consumption models (APEX) supporting low-latency AI/data workflows

Top news (3)

1. **Cybersecurity focus is moving "full-stack" as AI raises the threat level** — At the Munich Security Conference, **Google** called for a collaborative, end-to-end approach and highlighted adoption of **Google Distributed Cloud (Air-Gapped)** by **NATO, the U.S., Germany, the UK and Australia**. See: Google calls for full-stack cybersecurity at Munich Security Conference.
2. **Compute and energy constraints are becoming a visible limiter on AI scaling** — A January 2026 "AI Frontiers" digest from Ukraine's cybersecurity coordination bodies flags rising focus on efficiency/monetization, intensifying US–China competition in semiconductors/compute infrastructure, and **infrastructure + energy constraints** as key bottlenecks. See: AI Frontiers: January 2026 review of key AI events.
3. **AI networking supply chain is pushing silicon photonics toward high-volume DWDM optics** — Tower Semiconductor and Scintil Photonics announced availability of **LEAF Light™**, a heterogeneously integrated **DWDM laser source** validated on Tower's silicon photonics production lines, targeting **DWDM co-packaged optics** for hyperscale AI networking, with a stated pathway from evaluation to "**millions of units per month**." See: Tower and Scintil launch DWDM laser sources for AI.

Key deals, projects and corporate moves

Global

- **Enchanted Rock leadership hire (go-to-market for data centre/critical infrastructure)**

- Enchanted Rock hires Niki Herr as Chief Marketing Officer: Niki Herr appointed **CMO** to lead integrated marketing, brand and communications as the company scales across **data centers, critical infrastructure, and commercial/industrial** markets.
- Prior roles cited include leadership positions at **Interpublic Group agencies, Gensler, and Stem, Inc.**

- **Enterprise data + AI operations reference architecture (consumption model)**
  - McLaren turns 1.5 TB race data into competitive edge: McLaren processes **~1.5 TB** of race-weekend telemetry/video/simulation data using **Dell PowerStore + PowerScale**, consumed via **Dell APEX** and delivered as part of the **Dell AI Factory**, paired with **Dell PowerEdge** servers.
  - Emphasis is on **low-latency access** for simulations and scalable storage for **unstructured datasets**—a relevant pattern for AI-driven workloads in colocation/private DC environments.

Power, grid and interconnection highlights

- **Industry priority remains power availability and scalable build formats**
  - PTC'26 highlights data centre growth, AI and sustainability: atNorth commentary from PTC'26 identifies **power availability**, **modular/scalable design**, and access to **renewable power** as core priorities alongside connectivity.

No specific new grid connections, interconnection awards, PPAs, or substation/transmission projects were detailed in today's stories.

Policy, regulation and security

Europe / transatlantic security

- **Full-stack cybersecurity and sovereign/air-gapped deployments highlighted**
  - Google calls for full-stack cybersecurity at Munich Security Conference: Google urged a "full-stack" collaborative approach; warned of **AI-enabled adversary tactics** (via Google Threat Intelligence); and highlighted **Google Distributed Cloud (Air-Gapped)** usage by **NATO** and multiple governments.
  - Google also opened applications for the **Google for Startups Gemini Startup Forum: Cybersecurity**.

Ukraine / global competition framing

- **AI infrastructure geopolitics and constraints**
  - AI Frontiers: January 2026 review of key AI events: digest flags **US–China competition** in semiconductors/compute infrastructure and stresses **infrastructure and energy constraints** as practical limits on continued model scaling.

Regional watch: Africa (AI demand + local capacity)

- **GPU-as-a-Service positioned as a local-data-centre growth lever**
  - GPU-as-a-Service powers African AI via local data centres: Cassava AI authors argue GPUaaS delivered from **African data centres** can improve **cost-efficiency** and **data sovereignty**, enabling local development and deployment.
  - Partnerships cited include **Cassava Technologies' work with NVIDIA** as a model of combining global expertise with local infrastructure.

Technology & supply chain (AI networks and optics)

- **Silicon photonics for hyperscale AI networks (DWDM co-packaged optics)**
  - Tower and Scintil launch DWDM laser sources for AI: **LEAF Light™** described as the first heterogeneously integrated **DWDM laser source** using Scintil's **SHIP™** tech, validated on **Tower's** production lines.
  - Collaboration targets **DWDM co-packaged optics** and cites an AI networking market opportunity of **$200B by 2030**.

2-line close

Execution risk is increasingly concentrated in (1) cybersecurity posture across the stack and (2) physical constraints around compute and energy. Supply-chain innovation in high-volume AI networking optics is accelerating alongside demand for more localized GPU capacity.

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