US Data Center Daily Briefing

February 19, 2026

KEY THEMES

- India sovereign AI build-out and new fibre routes
- Large-scale gas-fired generation positioned for AI load
- Permitting/public-health scrutiny for new power plants and transmission
- Institutional capital vehicles targeting AI data centres and GPUaaS
- Operator sustainability metrics (PUE/WUE) and on-site fuel cell contracting
- Hydrogen backup power positioned as a decarbonisation pathway
- European cloud sovereignty / repatriation and Gaia-X alignment
- Tooling upgrades for monitoring, digital twins, security, and carbon reporting

---

Top news (3)

1. **Large India build-out signal**: Google announces AI investments and partnerships at India summit including **$15bn** for foundational AI infrastructure and new **America–India Connect** fibre routes linking the **U.S., India and Southern Hemisphere** locations.
2. **Big-ticket power for AI data centres**: Japan and U.S. agree first Strategic Investment Initiative projects includes a **gas-fired power project for AI data centers (~$33.3bn)** as part of the first tranche.
3. **Virginia gas + transmission line controversy**: Tenaska gas plant proposal threatens Virginia communities, data centres — Tenaska is appealing a county planning decision and pursuing approval for a **second gas-fired plant**, with a proposed **~115-mile 765kV** transmission line discussed as a way to supply data centres.

Key deals & platform moves

UK / Funds & capital formation

- Gorilla to acquire Shackleton and form Gorilla Technology Capital: Gorilla Technology Group signed an **MOU** to acquire **UK-authorised AIFM Shackleton Finance** and rebrand as **Gorilla Technology Capital**.
    - Aim: a **regulated investment vehicle** for institutional capital targeting **AI data centres, GPU-as-a-Service, quantum, and cybersecurity** assets.

- Status: conditional on **UK FCA approval** and execution of a definitive sale and purchase agreement.

India / Compute infrastructure ecosystem

- NVIDIA partners to expand compute and sovereign AI in India: NVIDIA partnerships tied to the **IndiaAI Mission** (stated as **investing over $1bn** to boost compute capacity).
  - Notable capacity signals cited:
    - **Yotta "Shakti Cloud"**: **20,000+ Blackwell Ultra GPUs**.
    - **E2E Networks**: **HGX B200 cluster** at **L&T Vyoma**.
    - **Netweb**: **GB200 NVL4 systems** manufactured in India.
- Google announces AI investments and partnerships at India summit: alongside the **$15bn** infrastructure investment, Google.org announced **$30m** (AI for Government Impact Challenge) and **$30m** (AI for Science Impact Challenge), plus partnerships with Indian government bodies via DeepMind / Google Center for Climate Technology.

Power, grid, and interconnection highlights

United States (Virginia)

- Tenaska gas plant proposal threatens Virginia communities, data centres:
  - Developer: **Expedition Generation Holdings (Tenaska)**.
  - Process: appealing a **Fluvanna County Planning Commission** decision; Planning Commission to review **stack height** and a **Special Use Permit** on **Feb. 24, 2026**.
  - Externalities cited: a Harvard Dominici Lab study says the plant would increase **PM2.5 exposure** affecting **4+ million** people.
  - System context: Tenaska claims the plant could power **up to 1.5m homes**; story references potential delivery via a proposed **~115-mile 765kV** transmission line to supply data centres.

Japan–U.S. strategic investment / power build

- Japan and U.S. agree first Strategic Investment Initiative projects: first-tranche includes **three projects**, notably:
  - **Gas-fired power project for AI data centers (~$33.3bn)**.
  - Other tranche items for context: **synthetic diamond manufacturing (~$600m)** and **U.S. crude export infrastructure (~$2.1bn)**.

- Industrial supply chain angle: multiple Japanese firms and SMEs expressed interest in supplying equipment/components (including **Toshiba, Hitachi, Mitsubishi Electric, SoftBank** among others listed).

Backup power decarbonisation (technology marketing)

- Whitepaper: Hydrogen backup for net-zero data center power and Jenbacher hydrogen generators for decarbonizing data center backup power: INNIO positions **Jenbacher hydrogen generators** as a route to decarbonise data-centre backup power in North America (materials presented as a white paper / download).

Sustainability, operations, and efficiency (operator & vendor updates)

North America (Canada / U.S.)

- Cologix advances sustainable data centers amid AI growth:
  - Reported 2024 metrics: **PUE 1.486** and **WUE 0.203**.
  - Certifications/energy mix: **LEED Gold** for **Montreal MTL8**; **65%** of energy from **carbon-free sources** (as stated).
  - Power strategy examples:
    - Partnership with **AEP Ohio** to install **on-site fuel cells** at a future **Columbus** facility; described as **funded by Cologix** under a **long-term contract**.
    - Use of **Hydro-Québec** hydropower (stated as **~99% renewable in Montreal**) and **deep lake water cooling** in Toronto.

Digital infrastructure management tooling

- Schneider Electric reflects on EcoStruxure IT 2025 and 2026 roadmap:
  - 2026 roadmap themes: **security, monitoring, digital twin, and AI enhancements**.
  - Specific product notes: **NetBotz TAA** (U.S. government), **DCE scalability to 4,000 devices under SNMPv3**, **IT Advisor 3D engine** and **AR app**.
  - Commercial/assurance: licensing simplified **from >300 to 9**; **ISO 27001** for IT Expert; mentions **Motivair liquid-cooling integrations** and **CUE carbon reporting** addition.

Policy / regulation and sovereignty signals

Europe / cloud sovereignty

- Sigma Software Head: Cloud repatriation, partnerships and Gaia-X: discusses European-facing partnership strategy supporting **cloud repatriation**, engagement with **Gaia-X**, and work with European providers (e.g., **UpCloud**) and open-source/OpenStack contributions.

Geopolitics intersecting with "data-centre zones" (Gaza)

- Europe urged to reject Trump's Gaza redevelopment masterplan: references a proposed development plan including **designated data-centre zones** and **biometric surveillance**, with Europeans and Arab states due to consider the plan at a **Board of Peace meeting in Washington on Feb. 19**.

Industry context (demand & design requirements)

- How Data Centers Power AI and the Edge Now: Telehouse/techUK discussion highlighting practical design constraints for AI and edge use cases: **power density, latency, data sovereignty, resilience, and connectivity**, with perspectives spanning **Europe, Japan, and Canada**.

2-line close

Capital formation and sovereign-compute announcements are accelerating, with India and Japan–U.S. initiatives pointing to large downstream infrastructure needs.

At the same time, local permitting and public-health scrutiny around new generation and transmission can still be the pace-setter for deliverability.

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 →