US Data Center Daily Briefing

February 20, 2026

KEY THEMES

- $15bn hyperscale AI infrastructure and subsea gateway in India
- Enhanced geothermal (EGS) ramps with 53 MW unit and 320 MW PPAs
- UK AI strategy backed by £1.6bn including supercomputer upgrade
- DOE HPC/network infrastructure enabling AI digital twins
- Growing linkage between firm clean power and data centre demand

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Global data centres & digital infrastructure briefing (UTC 2026-02-20)

Audience: Institutional asset managers and infrastructure fund managers focused on data centres, power, and grid infrastructure.

Top news (3)

1. **India: hyperscale + subsea scale-up** – Google announces $15B India AI infrastructure investment in Vizag, centred on a "full-stack AI hub" in Visakhapatnam with **gigawatt-scale compute** and an **international subsea cable gateway**.
2. **Firming power: commercial enhanced geothermal at meaningful size** – Enhanced geothermal systems could expand U.S. geothermal power generation details Fervo Energy's **53 MW** Cape Generating Station (first large-scale commercial EGS generator in the US) and expansion-linked **PPAs totaling 320 MW with Southern California Edison**.
3. **UK: AI funding tied to compute upgrades** – UKRI launches first-ever AI Research and Innovation Strategy includes **£1.6bn targeted AI funding (2026–2030)** and **£36m** to upgrade Cambridge's **DAWN supercomputer**.

Key deals & projects

India

- **Google – Visakhapatnam (Vizag)**: Google announces $15B India AI infrastructure investment in Vizag
  - Announced **$15bn infrastructure investment** in India.
  - Scope includes a **full-stack AI hub** intended to host **gigawatt-scale compute**.

- Also includes an **international subsea cable gateway**.
- Additional context from the same announcement: **four new subsea systems between the US and India**.

United Kingdom

- **UKRI – national AI strategy and compute**: UKRI launches first-ever AI Research and Innovation Strategy
  - **£1.6bn** of targeted AI funding for **2026–2030** across research, skills, infrastructure and translation.
  - Includes **up to £137m** for DSIT's **AI for Science** programme.
  - Includes **£36m** to upgrade Cambridge's **DAWN supercomputer**.

United States (R&D / technical capability)

- **Berkeley Lab – AI-driven digital twins + DOE infrastructure**: Berkeley Lab advances AI-powered digital twins across scientific domains
  - Deploying AI digital twins across multiple domains (accelerators, tsunami forecasting, chemistry, building energy systems, fusion, bioreactors).
  - Uses DOE high-performance compute and networks: **NERSC Perlmutter** and **ESnet**.
  - Notable technical programmes/models cited: **StFT multi-scale AI model**, **BELLA beamline** twin for automated alignment, **DTCS** for real-time chemistry experiments.

Power, grid & interconnection highlights

United States – geothermal as a firm capacity pathway

- **Fervo Energy – Cape Generating Station (EGS)**: Enhanced geothermal systems could expand U.S. geothermal power generation
  - Building a **53 MW** unit (noted as **28 MW net summer capacity**) due **online June 2026**.
  - Two additional **53 MW** units expected **January 2027**.
  - Expansion-related **PPAs totaling 320 MW with Southern California Edison** with expansion referenced for **2028**.
  - Data-centre-adjacent signal: mentions a **Meta–SAGE agreement for up to 150 MW for data centers**.
  - Additional pipeline/technology notes: a **Rodatherm closed-loop pilot** expected by **January 2028**; references to **DOE FORGE** research and **Department of Defense**

partnerships to power military bases.

Policy & regulation

United Kingdom

- **UK AI research & infrastructure funding envelope**: UKRI launches first-ever AI Research and Innovation Strategy
  - First-ever **AI Research and Innovation Strategic Framework** backed by **£1.6bn (2026–2030)**.
  - Specific line items relevant to compute demand and capacity planning: **DAWN** upgrade funding (**£36m**) and **AI for Science** programme funding (up to **£137m**).

People & operations (sector workforce)

- **Compass Datacenters – operations talent**: USMC Veteran Kathy Miller Now Data Center Operator at Compass
  - Kathy Miller is now a **Data Center Operator** supporting Compass Datacenters at the **IAD-E** site.

2-line wrap

Large-platform capex signals remain tightly linked to both **energy firmness** (EGS geothermal) and **connectivity** (subsea gateway + new systems). Public-sector AI funding in the UK and DOE-enabled R&D in the US continue to reinforce the compute infrastructure build-out.

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