US Data Center Daily Briefing

February 21, 2026

KEY THEMES

- Virginia 230 kV transmission rebuilds tied to data centre demand
- UK public support rises with data centre waste-heat reuse
- Heat networks/ectogrid models positioned as decarbonisation enablers
- Energy security policy linking critical minerals and rising AI/data centre load
- Workforce development and trade pathways for data centre build/ops
- GPU infrastructure efficiency framed as OpEx and delivery lever
- Public consultation and cultural landscape constraints affecting grid projects
- Government innovation funding supporting broader tech/defence ecosystems

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Global data centres, power & grid briefing (UTC 2026-02-21)

Top news (3)

- **US grid: new transmission rebuild proposals in Virginia.** Dominion proposes 230 kV line rebuilds near Charlottesville, Gordonsville covering ~22.3 miles (Dooms–Charlottesville) and ~20 miles (Charlottesville–Gordonsville), framed as responding to regional demand from data centres.
- **UK social licence: waste-heat reuse materially improves sentiment.** Two-thirds of Brits favor local data centres using waste heat reports 66.8% would view nearby data centres more favourably if waste heat is used for local heat networks.
- **Energy security focus: governments linking demand growth to data centres/AI.** Japan official attends IEA ministerial on energy security highlights calls for investment and government action amid rising energy demand from data centres and AI.

Key deals & projects

Europe (UK)

- **Heat networks / waste heat integration:** Two-thirds of Brits favor local data centres using waste heat
  - Survey findings: **66.8%** more favourable views if waste heat is used; **75.6%** support cooperation between data centres, energy providers and local authorities.

- Referenced project: **E.ON "Silvertown ectogrid™"** in East London, covering **760,000 sqm**.
- Reported impact: ~**4,000 tonnes CO2** saved annually; **88% lower emissions vs gas boilers** (per E.ON).

North America (Canada)

- **Innovation funding adjacent to digital/defence ecosystems:**PacifiCan invests over $46.6M in B.C. defence innovation
  - Total: **CAD 46,672,430** across **eight** projects to accelerate defence innovation and supply-chain integration.
  - Major allocations (selected):
    - **University of British Columbia**: **CAD 20,646,400** (three projects)
    - **Simon Fraser University**: **CAD 19,957,611** (two projects)
    - **UBC-Sauder CDL**: **CAD 1,579,809**
    - **Alacrity**: **CAD 2,621,746**
    - **Association of British Columbia Marine Industries**: **CAD 1,866,864**

Power & grid / interconnection highlights

North America (US – Virginia)

- **Transmission rebuilds tied to data centre-driven load growth:**Dominion proposes 230 kV line rebuilds near Charlottesville, Gordonsville
  - Projects:
    - **Dooms–Charlottesville**: ~**22.3 miles** (230 kV rebuild)
    - **Charlottesville–Gordonsville**: ~**20 miles** (230 kV rebuild)
  - Process and dates:
    - Public urged to comment to Virginia **SCC**; Dooms case referenced as **PUR-2025-00189**.
    - **Comments due March 25, 2026**.
  - Siting/environment themes raised:
    - Requests to work **within existing ROW** where possible, use **shortest towers**, and apply **avoidance/mitigation**.

- Concerns include cultural landscape impacts (including **Monticello viewshed**).

Policy & regulation

Asia (Japan / IEA)

- **Energy security policy coordination with explicit data centre/AI load context:** Japan official attends IEA ministerial on energy security
  - Japan's METI Counselor participated in the **IEA Ministerial (Paris, 18–19 Feb 2026)**.
  - Key messages: strengthen **finance**, **supply chains**, and **workforce**; urge investment and government action to secure supply amid rising demand from **data centres and AI**.
  - Output noted: ministerial declaration on **critical minerals**.
  - Bilaterals referenced: discussions with Poland's Energy Minister on **nuclear/LNG cooperation**; meeting with IEA Executive Director **Fatih Birol**.

Market / operations / workforce

North America (US)

- **Workforce development for data centres (trade pathway emphasis):** DataBank Hosts Atlanta Career Event to Showcase Data Center Careers
  - Event: hosted at a **DataBank Atlanta** data center with **Opportunity Runway**, **Method Experts**, and **PRT Staffing**.
  - Attendance: **nearly 20** young people.
  - Pay datapoints cited: **IBEW apprenticeships $45–$55/hour** vs a cited typical **four-year college starting salary ~ $60,000**.

Global (AI infrastructure / vendor positioning)

- **GPU efficiency as a cost and delivery risk for AI workloads:** Choosing the Right AI Infrastructure to Avoid Hidden Inefficiencies
  - Massed Compute positions **NVIDIA-backed GPU infrastructure**, secure storage, flexible contracts and engineering support.
  - Claimed pain points driving higher OpEx / slower delivery: low **goodput**, fragmented stacks, and lack of visibility.

Two-line close

Investment bottlenecks are increasingly shaped by grid build timing, community acceptance, and supply-chain resilience rather than real estate alone. The most actionable near-term signals are where governments, utilities, and operators are already formalising processes, partnerships, and workforce pipelines.

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