US Data Center Daily Briefing

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KEY THEMES

- Pure DC and AVK launch 110MW Dublin microgrid
- Detroit City Council urges two-year data center moratorium
- rPlus $650m financing for 400MW Idaho solar for Meta
- T5 Data Centers targets $2 billion expansion raise

Pure Data Centres Group just gave Europe a pretty blunt answer to the grid-constraint era: build your own. At its Dublin campus, Pure DC and AVK have switched on an on-site, dispatchable **110MW microgrid** designed to let AI capacity land in phases *before* full grid connection — a move that feels less like "resilience" and more like a new deployment model for constrained markets.

The Big Stories

Pure DC unveils Europe's first 110 MW data centre microgrid at its Dublin campus, built with AVK, using three energy centres and a 20MW BESS to deliver phased capacity ahead of full grid connection. The system uses dual-fuel Wärtsilä engines with HVO backup and is hydrogen-blend ready, and it's being pitched as a blueprint for other tight European power markets. The important tell here is the sequencing: the microgrid isn't a "backup" story — it's a way to turn permitting and interconnection uncertainty into a solvable engineering problem.

Detroit council urges two-year moratorium on data centers with a 6–2 vote asking Mayor Mary Sheffield to pause new permits while the city studies grid, water, noise, economic, and land-use impacts. Detroit's move echoes roughly 20 Michigan communities pursuing similar pauses, even as state incentives remain generous (sales and use tax exemptions through at least 2050 for projects investing ≥$250m and employing ≥30 people). For investors, this is the friction point: incentives can pull projects in, but local permissioning can still slam on the brakes — and timelines become political.

T5 Data Centers to Raise $2 Billion for Expansion is a reminder that capital is still available for platforms positioned around build-to-suit and operations — especially with AI demand as the implied demand backdrop. The headline matters less than what it signals: the "next wave" of capacity won't be won by who talks about AI the loudest, but by who can actually finance, build, and run reliably in a world of power and schedule constraints.

rPlus secures $650m financing for Blacks Creek 400MW solar in Ada County, Idaho, with the project supplying Idaho Power's grid — including Meta's Kuna, Idaho data center. Construction-stage financing converts to long-term debt once the project reaches commercial operation. This is the more durable version of the "data centers need power" story: not a press-release PPA, but a fully financed asset tied into the same grid the load sits on.

Germany expands data centres amid AI demand and power constraints as growth broadens beyond Frankfurt into a multi-city buildout, with Berlin and tier-two regions picking up spillover. Google has pledged €5.5 billion through 2029, and Frankfurt alone already supports about 745MW live IT load with significant additional MW under construction and planning. The takeaway is that Europe's constraint is now shaping geography: capacity is following where power, land, and approvals can be assembled — not just where latency and carrier hotels used to dictate.

Behind the Headlines

MCJ announces investment in DG Matrix's solid-state transformers and the numbers are what jump off the page: DG Matrix says its "Interport" replaces multi-skid power conversion with a 4×4-foot unit, using 10 components, with a footprint claimed to be 15× smaller and system cost up to 90% lower. If even a slice of that holds up at scale, it's not just a nicer box — it's a potential redesign of how power is converted and routed inside data centers and microgrids. The broader point: as the industry runs into physical constraints (space, heat, interconnect delays), the biggest step-changes may come from boring-sounding electrical hardware.

Microsoft MOSAIC uses MicroLEDs to halve datacenter cabling energy is one of those "if it ships, it matters" interconnect stories. Microsoft Research (Cambridge, UK) built a MicroLED-based optical interconnect, proved it in a thumb-sized transceiver with MediaTek, and estimates ~50% lower cabling energy versus laser-based cables, with reach up to 50 meters; commercialization with partners is targeted by late 2027. The investment logic is straightforward: AI clusters don't just stress power at the substation — they stress it inside the building through fabrics, optics, and the energy cost of moving bits. If Microsoft is pushing MicroLEDs here while also positioning Hollow Core Fiber for longer links, it's telegraphing that interconnect efficiency is becoming first-order, not a rounding error.

Pado and Vessl partner to align AI workloads with power gets at a quieter shift: compute orchestration is starting to treat electricity like a real-time input, not a fixed overhead. The partnership combines grid-aware orchestration with an MLOps platform to route AI jobs based on real-time energy signals and renewable availability, aiming to lift midmarket GPU

utilization from roughly 30–40% toward 60%. The catch is in the fine print — GPU scarcity, on-site storage limits, and sovereignty constraints can all cap how “movable” workloads really are. Still, the direction is clear: in a constrained power world, software that can arbitrage time and location starts to look like infrastructure.

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