

Data Center Briefing

February 11, 2026

Global

Key themes:

Grid capacity is a binding constraint for AI-scale builds; Financing tightens as 2025 leasing converts to 2026–2027 deliveries; Energy procurement and renewables access shaping AI strategy and M&A; Geopolitics and security concerns driving digital infrastructure sovereignty; Carrier hotels and fiber density remain strategic metro assets; Storage and private-cloud stack refreshes emphasize automation and flexibility; Operational efficiency and load-modelling research aims at energy and grid integration

Global data centres, power & grid briefing (UTC: 2026-02-11)

Top news (3)

- **Demand is running ahead of financing and grid capacity.** In its 2026 outlook, DataBank said enterprise colocation demand should remain strong, but warned that **financing and grid capacity will be strained** by AI-scale infrastructure; it cited **15 GW leased in 2025** and noted that **most capacity is expected online in late 2026–2027** ([Data center industry outlook for 2026: power, funding, AI](#)).
- **Energy constraints are now shaping the AI supply chain and M&A.** Jefferies argued the AI cycle is shifting pricing power toward **memory suppliers (SK Hynix, Micron)** with **memory prices up ~50% last quarter**, while flagging energy as a binding constraint; it also referenced OpenAI's call to add **100 GW/year** and said Google announced a **\$4.75bn acquisition of Intersect** to secure renewable power ([AI investment cycle shifts pricing power toward memory suppliers](#)).
- **Geopolitics is increasingly tied to “connectivity + AI data centres.”** Azerbaijan and the US issued a **Strategic Partnership Charter** covering regional connectivity, energy, AI and digital infrastructure, and security, with **working groups to define projects/roadmaps within three**

months ([Azerbaijan and US Charter on Strategic Partnership for Connectivity, AI](#)).

Key deals & projects

United States

- **Michigan (Detroit metro) carrier hotel scale/throughput:** 123NET highlighted its **seven-story, 136,000 sq ft** Southfield data center located at Michigan's "most fiber-dense intersection," reportedly moving **10 terabytes per second**, linking **40 ISPs**, and hosting infrastructure for automakers and other sectors ([Inside 123NET's seven-story Southfield carrier hotel data center](#)).

Azerbaijan / US

- **Strategic partnership framework (project pipeline to be defined):** The Charter explicitly calls out cooperation areas including **AI data centers**, connectivity corridors (including the **Middle Corridor** and **TRIPP**), energy and security, with defined near-term next steps (projects/roadmaps within **three months**) ([Azerbaijan and US Charter on Strategic Partnership for Connectivity, AI](#)).
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Power & grid / interconnection highlights

United States

- **Call for a grid "renaissance" to meet AI compute load growth:** Grid Forward's CEO urged a coordinated, large-scale US grid upgrade to support AI compute demand and broader electrification; he framed current progress as too slow and referenced commentary that "datacenters into space" could become easier over **three to five years** if grid build-out continues to lag ([Grid Forward CEO urges urgent grid infrastructure renaissance now](#)).

Market signal: delivery timing vs leasing

- DataBank's outlook emphasizes a near-term timing mismatch: **15 GW leased in 2025**, with much of that capacity expected to arrive **late 2026-2027**, alongside warnings that both **grid capacity** and **financing** are tightening ([Data center industry outlook for 2026: power, funding, AI](#)).
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Policy, regulation & security

Nordics (security and digital infrastructure posture)

- **Norway threat assessments and infrastructure sovereignty:** Commentary on Norway's 2026 threat assessments (E-tjenesten, PST, NSM) highlighted **digital-domain vulnerabilities** and state-actor risk (notably **Russia**, with concerns about **China**), alongside a call for **joint Nordic**

digital infrastructure to reduce foreign dependence ([Norway faces major security challenges, urges Nordic digital infrastructure](#)).

South Caucasus / US (connectivity + security)

- **Charter scope includes security and digital infrastructure:** The Azerbaijan-US Charter and related signing coverage includes cooperation spanning **energy, defense/security, AI data centers, and connectivity corridors**, with project definition delegated to working groups on a defined timetable ([Azerbaijan and US sign Strategic Partnership Charter, discuss cooperation](#)).

India (market access / policy advisory)

- **Policy-to-market execution capacity expands:** Access Partnership opened an India office and plans to launch an **AI Diffusion Framework & Playbook** at a February 2026 summit, targeting clients across AI, data centres and related strategic sectors ([Access Partnership opens India office to support AI market access](#)).

Technology & operations watch (capex/opex relevance)

Storage, private cloud and AI infrastructure tooling

- **IBM storage platform refresh with a dated GA milestone:** IBM announced FlashSystem **5600/7600/9600**, a **5th-gen FlashCore Module (up to 105TB)**, and “FlashSystem.ai,” claiming up to **90% reduction in manual effort** and up to **40% greater data efficiency; general availability: 6 March 2026** ([IBM unveils agentic AI-powered FlashSystem portfolio for autonomous storage](#)).
- **Dell Private Cloud broadens hypervisor options:** Dell Private Cloud added **Nutanix** support (deploy Nutanix AHV on **Dell PowerFlex** now), with **Dell PowerStore integration planned for the summer**, while maintaining VMware and Red Hat OpenShift support ([Dell Private Cloud adds Nutanix support for flexibility](#)).

Energy efficiency / grid interaction research signals

- **Carbon/energy-aware autoscaling:** NeuroScaler (research) reported **34.68% lower energy use** versus Kubernetes HPA in a real testbed while maintaining target latency—relevant to operators focused on energy constraints and cost-to-serve ([NeuroScaler: AI-native Energy-Optimal Autoscaling for Container-Based Services System](#)).
- **Data-centre load modelling for power-system stability:** A research paper proposed a physics-informed dynamic load model validated on multiple datasets and evaluated on several grid test systems, highlighting that interactions among large electronic loads can affect post-disturbance

recovery dynamics ([Dynamic Load Model for Data Centers with Pattern-Consistent Calibration](#)).

Networking performance at scale (AI clusters)

- **Programmable-switch TCP at very high throughput:** Laminar (research) described a TCP stack on programmable switches (Intel Tofino 2) targeting near-RDMA performance while preserving TCP/POSIX compatibility; reported benefits include tail-latency and throughput-per-watt improvements ([Laminar enables TCP at terabit speeds on programmable switches](#)).

Two-line close

Grid delivery speed and financing capacity remain the key gating items against continued AI-led leasing momentum.

Security posture and sovereign connectivity initiatives are increasingly being packaged together with AI data centre ambitions.