

Data Center Briefing

February 15, 2026

Global

Key themes:

Canada–Germany AI cooperation and sovereign tech positioning; Secure compute infrastructure elevated in public-sector agendas; Smart-city platform budgets: pilot vs scaled deployments; Lifecycle budgeting and O&M (10–20% annually) highlighted; Frankfurt ecosystem focus on regulated deployments and legacy integration

Top news (3)

1. Canada–Germany move to build “secure compute” capacity: [Canada and Germany sign AI declaration, launch Sovereign Alliance](#). The partnership is positioned around expanding secure compute infrastructure, accelerating AI R&D/commercialization, and strengthening talent development.
2. Smart-city digital infrastructure budgets are being framed in clear tiers (pilot to scaled rollouts): [Smart City Platform Costs: Pilots, Scale, and Long-term Budgets](#) outlines pilots at **\$100k–\$500k** and multi-department programs at **\$1M–\$10M**, with lifecycle budgeting emphasis.
3. Annual O&M expectations are being explicitly benchmarked for smart-city deployments: [Practical cost breakdown for developing focused smart city solutions](#) flags ongoing maintenance at **~10–20% per year**, reinforcing the importance of long-term operating budgets alongside initial capex.

Policy, regulation, and public-sector signals

Canada / Germany

- At the Munich Security Conference (Feb 14, 2026), Canada and Germany signed a [Joint Declaration of Intent on Artificial Intelligence and launched](#)

[the Sovereign Technology Alliance](#).

- Stated focus areas:
 - **Expanding secure compute infrastructure**
 - **Accelerating AI research and commercialization**
 - **Strengthening talent development**
- The initiative builds on the Canada–Germany Digital Alliance announced Dec 8, 2025 (referenced in the same story).

Why it matters for infrastructure investors: The declaration explicitly links national security and industrial policy objectives to “secure compute infrastructure,” a framing that can influence future procurement, partnership structures, and location choices for compute-heavy facilities.

Key deals & projects (data centres / digital infrastructure)

Germany (Frankfurt)

- Market landscape / partner ecosystem: [Frankfurt’s leading AI agencies and data infrastructure partners](#) profiles consultancies and an infrastructure provider in Frankfurt (including **AI Superior, Innowise, T-Systems, and EDGECOM**) and highlights:
 - Deployment in **regulated environments**
 - **Integration with legacy systems**
 - Reference to **modular data centres** (as part of the services/infrastructure ecosystem described)

Note: No discrete financing rounds, site acquisitions, MW announcements, or construction timelines are provided in the stories.

Power, grid, and interconnection highlights

- No grid connection awards, PPA announcements, substation builds, or interconnection queue updates are included in today’s stories.

Cost, demand, and unit-economics signals (smart city / edge-adjacent)

Global

- Platform cost tiers (planning and budgeting): [Smart City Platform Costs: Pilots, Scale, and Long-term Budgets](#)

- **Pilots:\$100k-\$500k**
- **Multi-department scale:\$1M-\$10M**
- Cost categories highlighted include **connectivity, devices, data platforms, integration, O&M, and security.**
- Project sizing in EUR and lifecycle O&M: [Practical cost breakdown for developing focused smart city solutions](#)
 - **Small pilots:** from **€30,000**
 - **Large multi-domain initiatives:>€1,000,000**
 - Core components include **sensors, connectivity, platforms, citizen tools, integration.**
 - Ongoing **maintenance:~10-20% annually.**

Investor read-through: These ranges provide a rough guide to the “digital layer” budgets that can sit upstream of edge connectivity and compute needs, with O&M materially affecting total lifecycle economics.

Two-line close

Public-sector coordination around trusted AI and compute is becoming more explicit, which can shape how and where capacity gets built.

Separately, smart-city programs continue to emphasize pilot-led scaling and long-term operating budgets, clarifying the demand-side spend profile for digital infrastructure layers.