

Weekly Market Brief

Actionable commercial intelligence for data center and energy infrastructure professionals.

Week of August 17 – August 23, 2026

Signal categories

Immediate Opportunities

Deals & Developments

Market Intelligence

7 Immediate Opportunities

7 Deals & Developments

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Executive Summary

Week of August 17 – August 23, 2026

- New York power plant with 60MW available is listed for \$15 million, a significant opportunity for energy companies and data center developers.
- WhiteFiber acquires two sites in North Carolina for \$60 million, intending to develop 60MW data center campuses, impacting regional infrastructure investments.
- Texas grid pause risks 20% of US data center pipeline, representing a potential financial impact upwards of \$8 billion.

This week's insight

7 Immediate Opportunities

7 Deals & Developments

8 Market Intelligence

Immediate Opportunities

Open RFPs, powered sites, procurement windows, and actionable commercial opportunities

7 Opportunities

Actionable Opportunity

New York Power Plant Opportunity for Sale at \$15 Million

What happened

A power plant in New York is for sale, priced at \$15 million, featuring a 10-acre site generating 60MW via natural gas, selling power back to the grid at 5.5 cents per kWh.

Why it matters

This listing presents a significant opportunity for data center developers seeking reliable energy infrastructure, impacting site selection in a competitive market.

Immediate Opportunities

Opportunity details

Project: New York power plant
Deal Value: \$15 million
Capacity: 60 MW
Acreage: 10
Location: New York

Source

[View Source →](#)

Actionable Opportunity

Oregon Greenfield Grid Power Site Available for \$3.75 Million

What happened

An Oregon greenfield site offering 25MW of grid power is up for sale at \$3.75 million, with the buyer responsible for site construction and contracts.

Why it matters

This opportunity is crucial for data center developers looking to expand into locations with guaranteed access to grid power.

Immediate Opportunities

Opportunity details

Project: greenfield grid power site
Deal Value: \$3.75 million
Capacity: 25 MW
Acreage: 10
Location: Oregon

Source

[View Source →](#)

Actionable Opportunity

Wyoming Greenfield Grid Power Site Offered for Purchase

What happened

A powered site in Wyoming is available, featuring 75MW load capacity on a 150-acre parcel, with buyers responsible for all site construction.

Why it matters

This site presents a prime opportunity for energy developers and data center operators targeting areas with adequate power supply.

Immediate Opportunities

Opportunity details

Project: Powered Site Opportunity
Capacity: 75 MW
Acreage: 150
Location: Wyoming

Source

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Actionable Opportunity

Dallas TX Grid Power Site for Lease at \$155/kW

What happened

A data center site for lease in Dallas TX offers grid power with a load of 1.5MW at \$155/kW, requiring a minimum 30kW order.

Why it matters

This lease opportunity caters to data center developers needing flexible energy solutions to accommodate growing demand.

Immediate Opportunities

Opportunity details

Project: Powered Site Opportunity –
Dallas TX (grid power)
Capacity: 1.5 MW
Location: Dallas, TX

Source

[View Source →](#)

Actionable Opportunity

Texas Greenfield Powered Site Available for Purchase

What happened

A 15 MW powered site in Texas is listed for sale potential buyers are responsible for site construction, details pending.

Why it matters

This offering aligns with market demand for new data center locations capable of supporting substantial energy loads.

Immediate Opportunities

Opportunity details

Project: greenfield powered site opportunity

Capacity: 15 MW

Acreage: 2

Location: Texas

Source

[View Source →](#)

Actionable Opportunity

2026 Q3-Q4 Renewables Energy Resource RFP Issued

What happened

An RFP from SCPPA seeks proposals for renewable energy resources and storage solutions for Q3 and Q4 2026, due by December 30, 2026.

Why it matters

This RFP highlights a growing trend towards renewable energy solutions that can enhance data center energy sourcing strategies.

Immediate Opportunities

Opportunity details

Companies: SCPPA
Project: 2026 Q3-Q4 Renewables Energy Resource and Energy Storage Solutions RFP
Deadline: 2026-12-30

Source

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Actionable Opportunity

SCPPA Launches Standalone Energy Storage Solutions RFP

What happened

The SCPPA invites proposals for standalone energy storage solutions, with submissions accepted until November 25, 2026.

Why it matters

This RFP indicates a shift in energy procurement strategies that could optimize energy usage and reliability for data centers.

Immediate Opportunities

Opportunity details

Companies: SCPPA
Project:
2026-SCPPA-Standalone-Energy-Storage-RFP
Deadline: 2026-11-25

Source

[View Source →](#)

Deals & Developments

Transactions, financings, projects, contracts, and commercial milestones

7 Deals & Developments

Commercial Development

WhiteFiber Acquires Two North Carolina Sites for Data Centers

What happened

WhiteFiber has acquired two sites in North Carolina for \$60 million, aiming to create data center campuses with a targeted 60MW capacity by Q3 2027.

Why it matters

This acquisition demonstrates ongoing investments in data center infrastructure, enhancing local energy demand and supply capabilities.

Deals & Developments

Commercial details

Companies: WhiteFiber, Unifi Manufacturing, Enovum Data Centers Corp
Project: NC-2 and NC-3 data center campuses
Deal Value: \$60 million
Capacity: 60 MW
Acreage: 120
Location: Yadkin County, North Carolina
Deadline: 2026-12-31

Source

[View Source →](#)

Commercial Development

Landmark Dividend Purchases Jacksonville Data Center for \$8.1 Million

What happened

Landmark Dividend has acquired a Jacksonville-based T-Mobile data center for \$8.1 million, contributing to its digital infrastructure portfolio.

Why it matters

This acquisition signifies continued capital flow within the data center sector, impacting operational strategies and investments.

Deals & Developments

Commercial details

Companies: Landmark Dividend,
T-Mobile, Gallatin Point Capital
Project: T-Mobile data center
Deal Value: \$8.1 million
Location: Jacksonville, Florida

Source

[View Source →](#)

Commercial Development

Talen Energy Completes \$3.5 Billion Cornerstone Acquisition

What happened

Talen Energy Corporation completed its \$3.5 billion acquisition of Cornerstone Generation assets, enhancing its market positioning with substantial generation capacity.

Why it matters

This acquisition underscores growing consolidation in the energy sector, vital for supporting future data center power needs.

Deals & Developments

Commercial details

Companies: Talen Energy Corporation, Energy Capital Partners
Project: Cornerstone Acquisition
Deal Value: \$3.5 billion
Capacity: 2.45 GW
Location: Lawrenceburg, Indiana
Waterford, Ohio Mount Sterling, Ohio

Source

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Commercial Development

IBM and Together AI Sign \$240M Cloud Deployment Deal

What happened

IBM and Together AI announced a \$240 million deal to deploy Nvidia HGX B300 systems on IBM Cloud, expected by Q1 2027.

Why it matters

This agreement signifies a major investment in cloud infrastructure, important for data center and AI workload growth.

Deals & Developments

Commercial details

Companies: IBM, Together AI
Project: Nvidia HGX B300 cloud deployment
Deal Value: \$240 million

Source

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Commercial Development

Digital Core REIT Sells Stakes in US Data Centers for \$316 Million

What happened

Digital Core REIT is selling interests in three US data centers back to Digital Realty for about \$316 million, aiming to fund acquisitions in Asia.

Why it matters

This transaction reflects the dynamic nature of investment in the data center space, signaling shifts in market ownership.

Deals & Developments

Commercial details

Companies: Digital Core REIT, Digital Realty
Deal Value: \$316 million
Location: Toronto, Ontario Los Angeles, California Northern Virginia, Virginia Singapore Osaka, Japan

Source

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Commercial Development

Google Develops 506-Acre Data Center Campus in Oklahoma

Deals & Developments

Commercial details

Companies: Google, Beale Infrastructure
Project: Project Clydesdale
Deal Value: \$1 billion
Acreage: 506
Location: Tulsa, Oklahoma

Source

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What happened

Google confirmed its involvement in a \$1 billion, 506-acre data center project near Tulsa, impacting local infrastructure development.

Why it matters

This project represents a significant long-term investment in regional infrastructure, crucial for supporting energy demands.

Commercial Development

SpaceX to Rely on On-Site Power for Texas Chip Factory

What happened

SpaceX plans to power its TeraFab chip factory in Texas using on-site generation and battery storage, without a grid connection.

Why it matters

This underscores a critical shift in energy infrastructure, relevant for data centers' energy strategies and flexibility.

Deals & Developments

Commercial details

Companies: SpaceX
Project: TeraFab semiconductor campus
Location: Texas

Source

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Market Intelligence

Market conditions, grid constraints, policy changes, and strategic signals

8 insights

Market Signal

New York Increases Electricity Imports from Canada Post Transmission Line Launch

What happened

New York has imported 52 GWh of electricity from Canada, the highest since January 2025, following the launch of the Champlain Hudson Power Express.

Why it matters

This infrastructure investment enhances energy procurement options for data centers, influencing operational strategies.

Market Intelligence

Market details

Companies: New York Independent System Operator (NYISO), Champlain Hudson Power Express (CHPE)
Project: Champlain Hudson Power Express
Location: New York City, New York

Source

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Market Signal

PJM Proposes Framework for Data Center Power Connectivity

What happened

PJM proposes a new framework to connect data centers to power supplies, addressing concerns related to growing electricity demand.

Why it matters

This initiative is key to ensuring reliable energy access for data centers, crucial for project viability.

Market Intelligence

Market details

Companies: PJM Interconnection
Project: Interim Resource Adequacy Service (IRAS)

Source

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Market Signal

Southwest Power Pool Approves Connection Study for Grid Enhancements

What happened

The Southwest Power Pool approved a study to enhance grid interconnectivity, anticipating increased reliability amid soaring electricity demand.

Why it matters

This study is vital for improving resource adequacy, impacting energy developers interested in expanding operations.

Market Intelligence

Market details

Companies: Southwest Power Pool
Project: WE EXPAND study
Capacity: 5.5 GW
Location: 17-state region

Source

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Market Signal

Texas Grid Interconnection Pause Threatens US Data Center Pipeline

What happened

Texas governor's pause on new data center grid interconnections threatens 20% of the US data center pipeline, risking around \$8 billion in projects.

Why it matters

This may lead to significant delays and financial impacts, reshaping investment strategies in the data center sector.

Market Intelligence

Market details

Deal Value: upwards of \$8 billion
Location: Texas

Source

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Market Signal

JLL Reports North American Data Center Demand Doubles Annually

What happened

JLL reported that data center demand in North America doubled year-over-year in H1 2026, led by hyperscaler growth with a record absorption of 25GW.

Why it matters

This trend highlights the surging data center market, affecting energy capacity planning and infrastructure investments.

Market Intelligence

Market details

Companies: JLL
Capacity: 25 GW
Location: North America

Source

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Market Signal

Xcel Seeks Court Help for Wind Farm Interconnections

What happened

Xcel is seeking intervention from the Colorado Supreme Court for the interconnection of two wind farms totaling over 1,000 MW, amid project delays.

Why it matters

This situation highlights regulatory challenges in energy development, impacting future operational capabilities.

Market Intelligence

Market details

Companies: Xcel Energy
Project: wind farms
Capacity: 1 GW
Location: Colorado

Source

[View Source →](#)

Market Signal

Data Center Coalition Files Motion with FERC on Regulatory Actions

What happened

The Data Center Coalition filed a Motion to Intervene regarding FERC's regulatory considerations affecting data centers, highlighting potential industry impacts.

Why it matters

This motion signals important regulatory developments that could influence operational and market conditions.

Market Intelligence

Market details

Companies: Data Center Coalition

Source

[View Source →](#)

Market Signal

Independent Power Producers Key to Data Center Development

What happened

An article discusses the pivotal role of Independent Power Producers (IPPs) in data center development amidst increasing power demands from AI workloads.

Why it matters

This discourse emphasizes the necessity for reliable power sources, impacting future data center investments and strategies.

Market Intelligence

Market details

Companies: Exus Digital

Source

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Questions?

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