

BI-WEEKLY

NEWSLETTER

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RSI

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Global News, financial analyses, data center related laws & regulations and further latest updates about technologies transforming the data center industry.

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Difficult yet to predict DeepSeek's potential impact on power demand, Japan's METI says

Japan's Ministry of Economy, Trade, and Industry (METI) finds it challenging to predict AI's impact on future electricity demand. The country's draft energy plan estimates a 10–20% rise in electricity generation by 2040, partly due to AI expansion. However, the emergence of DeepSeek, a more energy-efficient AI model, complicates these projections. Some experts argue that its efficiency could lower power consumption, while others believe increased AI adoption will drive demand higher. METI emphasizes the importance of securing sufficient decarbonized energy sources to support economic growth and industrial competitiveness. The uncertainty surrounding AI advancements makes long-term energy planning complex. Japan must carefully balance AI development with sustainable and reliable power solutions.

Source: [Reuters](https://www.reuters.com), February 3rd, 2025

Nvidia and Cisco to Accelerate Data Centre AI Adoption

NVIDIA and Cisco are partnering to accelerate AI adoption in data centers by integrating NVIDIA's AI software and hardware with Cisco's networking and security solutions. This collaboration aims to enhance data center performance, scalability, and security. The partnership focuses on simplifying AI deployment and management for enterprises, making it easier for businesses to leverage AI technologies. Joint development of AI-powered solutions for various industries is also a key aspect of this initiative. The collaboration is expected to drive innovation and efficiency in data center operations. By combining their strengths, NVIDIA and Cisco aim to provide comprehensive solutions that address the growing demand for AI in data centers. This partnership represents a significant step towards advancing AI capabilities in the data center industry.

Source: [DataCentreMagazine](https://www.datacentermagazine.com), February 26th, 2025

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Oracle Stock Slips As Earnings Miss Overshadows Growing AI Demand

Oracle reported Q3 earnings of \$1.47 per share on \$14.1 billion in revenue, falling short of expectations. However, its cloud services revenue grew 10% year-over-year to \$11.0 billion, while cloud infrastructure revenue surged 49% to \$2.7 billion. The company's total future revenue commitments increased by 62% to \$130 billion, reflecting strong demand. Despite these gains, Oracle's stock declined following the earnings report due to investor concerns over the revenue miss.

The company remains focused on expanding its cloud infrastructure and AI-driven services to compete with industry leaders. Its strategic shift toward cloud computing positions it for long-term growth. Oracle continues to invest in partnerships and AI workloads to strengthen its market presence. This performance highlights both the opportunities and challenges in the rapidly evolving cloud computing industry.

Source : [Investors](#), March 11th, 2025

Texas is a data center job hotspot in the tech boom

Texas has become a leading hub for data center employment, ranking second nationwide in the number of jobs in this sector. This growth is driven by significant investments from major technology companies, such as Microsoft's recent expansion in the state. The increasing demand for data centers is attributed to the rising need for cloud services and digital storage solutions. However, this rapid expansion has raised concerns about energy consumption and environmental impact. Communities across the country are expressing apprehension regarding the substantial energy requirements of data centers, which often provide relatively few jobs compared to their resource demands. Despite these challenges, Texas continues to attract data center projects, bolstering its position as a key player in the tech industry's infrastructure landscape.

Source: [Axios](#), March 11th, 2025

Nu Quantum: Quantum Datacenter Alliance Launched

Nu Quantum has launched the Quantum Data Center Alliance to advance quantum computing infrastructure. The alliance aims to create a network of quantum data centers to support the growing demand for quantum computing capabilities. It includes partnerships with leading technology companies and research institutions. The initiative focuses on developing scalable, secure, and efficient quantum data centers. The alliance will also work on integrating quantum technologies with existing data center infrastructure. This collaboration is expected to accelerate the adoption of quantum computing in various industries. The Quantum Data Center Alliance represents a significant step towards realizing the potential of quantum computing. By fostering innovation and collaboration, the alliance aims to drive the future of quantum data centers.

Source: [DataCenterMagazine](#), February 26th, 2025

If Europe builds the gigafactories, will an AI industry come?

The European Commission plans to invest \$20 billion to construct four "AI gigafactories" to bolster Europe's competitiveness in artificial intelligence. These large-scale data centers aim to support the development of AI models that comply with the EU's stringent safety and data protection regulations. However, challenges include securing necessary chips, identifying suitable locations, and ensuring adequate electricity supply. Critics question the viability of such investments without significant European cloud service providers or

companies with extensive customer bases, citing potential risks. There's also concern about investing public funds in rapidly evolving technology that may require frequent, costly upgrades. Nonetheless, potential beneficiaries include European chipmakers and startups. This initiative is part of Europe's broader strategy to enhance its industrial policy and competitiveness in the AI sector.

Source: [Reuters](#), March 12th, 2025

Vertiv and Oxigen: Building Data Centres for the Future

Vertiv and Oxigen are collaborating to build data centers designed for future demands. Their partnership focuses on creating sustainable, efficient, and resilient data center infrastructure. They aim to address the growing need for data processing and storage while minimizing environmental impact. The collaboration includes the development of modular data centers that can be rapidly deployed and scaled. These data centers will incorporate advanced cooling technologies and renewable energy sources. The initiative also emphasizes the importance of security and reliability in data center operations. By leveraging their combined expertise, Vertiv and Oxigen plan to set new standards in data center design and operation. This partnership represents a significant step towards building data centers that meet the evolving needs of the digital age.

Source: [DataCenterMagazine](#), February 21th, 2025

Marc Benioff, Ray Dalio, and the cofounder of Alibaba talk US and China AI

At a CNBC conference in Singapore, tech and finance leaders, including Marc Benioff, Ray Dalio, and Joe Tsai, discussed the AI rivalry between the U.S. and China. Benioff questioned the massive investments by U.S. tech companies in AI infrastructure, as China's DeepSeek R1 model is proving to be more cost-effective and competitive. Dalio pointed out that while the U.S. dominates chip design, China is excelling in AI applications and chip manufacturing. Tsai emphasized the role of open-source AI in making technology more accessible beyond the wealthiest corporations. The rise of Chinese AI models has contributed to volatility in U.S. tech stocks, with companies like Nvidia facing market pressure. The discussion highlights China's growing AI influence, challenging the U.S. dominance through cost-effective and innovative solutions.

Source: [BusinessInsider](#), March 12th, 2025



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For further scope of services provided by RSI, please reach out to us with your inquiry at the contact information depicted below.

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