

State of AI Infrastructure Pressure

Technology press coverage • Compass Lens Report

40 topics measured • Window: Full history • Jun 2025 – Sep 2026 • 5,952 articles • As of 20 Sep 2026

A measured view of how technology-press attention is distributed, moving and connected across 40 related topics — who holds attention, who is gaining or cooling, whether attention is concentrating or spreading out, which topics the press repeatedly connects, and what kind of coverage defines the conversation.

This is a **Lens Report** covering **AI Infrastructure Pressure** — a measurement of how the technology press covered the **40 topics** listed below, between **Jun 2025** and **Sep 2026**, across **5,952** articles. Coverage draws on at least **89** distinct outlets; the busiest single outlet accounts for about **5.2%** of the set's measured press items.

Scope: This lens deliberately looks beneath the chip designers and hyperscaler brands: chips have their own lens (AI Chips & Inference Economics), so the roster here is the build-out layer — data centers, power, grid operators, and the companies running the compute.

How to read this report: Compass reads a curated panel of technology outlets — the same panel, at the same steady pace, month after month — and counts and classifies what the press publishes about the topics in this lens: attention, story types, direction, and what's covered together. Every figure is a measurement of that coverage — not a ranking of the products, and not advice — and each traces to a dated, cited article. The pattern is the product; the conclusions stay yours.

THE READ IN 60 SECONDS

Most-covered topic	Alphabet — 13.9% of the lens's coverage
Fastest-gaining	ByteDance — +6.3 pp (6.1% → 12.4% of lens coverage)
Attention concentration	The top 3 topics hold 33% of the coverage — broadly spread
Strongest pairing	Core Scientific + CoreWeave — covered together in 32 articles • distinctiveness 0.66

What not to over-read: this measures press coverage — not adoption, revenue, or quality.

Topics in this lens • 40

Topic share = that topic's measured articles divided by the sum of every lens topic's measured articles. An article covering several lens topics counts once for each of them, so shares measure attention to topics — not exclusive slices of unique articles. Lens entries are coverage topics, not mutually exclusive market participants — a company, its products and its models can each be topics, and their coverage overlaps.

Alphabet company	13.9%	IREN company	1.5%
ByteDance company	11%	Open Compute Project organization	1.5%
data centers technology	8.1%	NREL organization	1.4%
Ollama company	6.6%	TeraWulf company	1.3%
CoreWeave company	5.6%	Core Scientific company	1.3%
Cerebras company	3.6%	Colossus product	1.2%
Supermicro company	3.3%	Starcloud company	1.2%
vLLM technology	3.3%	Equinix company	1.1%
Stargate company	3.1%	Chevron company	0.9%
Nebius company	2.5%	AEMO organization	0.9%
Groq company	2.3%	Digital Realty company	0.8%

Nscale company	2.3%	Fluidstack company	0.8%
Corning company	2.3%	Vera Rubin NVL72 product	0.8%
Alibaba Cloud organization	2.2%	Colossus 2 product	0.7%
PJM organization	2%	GB300 NVL72 product	0.7%
Crusoe company	1.9%	SB Energy company	0.7%
DDN company	1.8%	Hyperion product	0.7%
ERCOT organization	1.8%	Colossus 1 product	0.6%
PCIe 6.0 standard	1.8%	Tennessee Valley Authority organization	0.6%
WEKA company	1.6%	FERC organization	0.6%

BOTTOM LINE

Across AI Infrastructure Pressure’s full history from June 2025 through September 2026, press attention is broadly spread but shifting toward data centers and a wider cast of infrastructure actors as Ollama and named infrastructure threads cool.

Key findings

- Alphabet leads coverage at 13.9%, but ByteDance at 11% and data centers at 8.1% keep the top tier plural, which is why no single subject defines the press agenda.
- Recent movement compares the latest quarter with the prior quarter: ByteDance gained 6.3 percentage points and data centers gained 3.3 points, so the shift is occurring inside the top tier.
- Below the leaders, Nscale gained 2.5 percentage points, Nebius 1.9 and Crusoe 1.2, so the expanding edge is distributed across several subjects.
- Ollama fell 5.9 percentage points, Stargate 1.8 and Colossus 1 1.7, so cooling cuts across both a highly covered name and narrower infrastructure threads.
- As the press describes progress, 73% of coverage is at announcement, 17% at launch and 7% at results, so the narrative is weighted toward declared activity rather than reported outcomes.
- Neutral framing accounts for 92%, versus 5% promotional and 2% critical, so shifts in attention occur inside a largely even-toned press narrative.

What Compass measured

This report describes how the technology press COVERED the 40 topics in this lens over full history – which drew the most coverage, which are gaining or cooling, what’s covered together, and how concentrated attention is. It measures coverage patterns, not the products.

Coverage leaders

The coverage set comprises 5,952 articles across 40 subjects, giving the press agenda substantial breadth beyond its leaders. Attention in this lens is broadly spread—the three most-covered topics hold about 33% of the set’s coverage, spread across roughly 18 effective topics. News and updates account for 41%, launches 21% and partnerships 18%, so attention is distributed through recurring event formats as well as across subjects.

Topic	Type	Share	Movement
Alphabet	company	13.9%	+0.5 pp

Topic	Type	Share	Movement
ByteDance	company	11%	+6.3 pp
data centers	technology	8.1%	+3.3 pp
Ollama	company	6.6%	-5.9 pp
CoreWeave	company	5.6%	+0.6 pp
Cerebras	company	3.6%	-0.5 pp
Supermicro	company	3.3%	+0.8 pp
vLLM	technology	3.3%	-0.6 pp
Stargate	company	3.1%	-1.8 pp
Nebius	company	2.5%	+1.9 pp
Groq	company	2.3%	+0.9 pp
Nscale	company	2.3%	+2.5 pp
Corning	company	2.3%	-0.3 pp
Alibaba Cloud	organization	2.2%	+1 pp
PJM	organization	2%	+0.6 pp
Crusoe	company	1.9%	+1.2 pp

Movement is the share shift defined under Momentum shifts below.

Momentum shifts

ByteDance rose from 6.1% to 12.4%, a gain of 6.3 percentage points, making it the largest recent increase and shifting weight inside the established top tier. Data centers climbed from 7.4% to 10.7%, gaining 3.3 points, so capacity-centered coverage is strengthening alongside that company-led move. Ollama's 5.9-point decline is the clearest cooling move, while Stargate and Colossus 1 also receded, which is why the pattern is a rotation of attention rather than a uniform rise across the set.

Movement is each topic's share of the lens's coverage in the last 3 months versus the 3 months before that, in percentage points (pp). Topics shifting less than 0.2 pp are steady.

GAINING SHARE

ByteDance +6.3 pp (6.1% → 12.4% of lens coverage)
data centers +3.3 pp (7.4% → 10.7% of lens coverage)
Nscale +2.5 pp (1.4% → 3.9% of lens coverage)
Nebius +1.9 pp (2% → 3.9% of lens coverage)
Crusoe +1.2 pp (1.7% → 2.9% of lens coverage)
Vera Rubin NVL72 +1.1 pp (0.5% → 1.6% of lens coverage)
Alibaba Cloud +1 pp (1.6% → 2.6% of lens coverage)
Groq +0.9 pp (1.8% → 2.7% of lens coverage)

COOLING

Ollama -5.9 pp (10.3% → 4.4% of lens coverage)
Stargate -1.8 pp (2.9% → 1.1% of lens coverage)
Colossus 1 -1.7 pp (2% → 0.3% of lens coverage)
IREN -1.6 pp (2.4% → 0.8% of lens coverage)
Core Scientific -1.4 pp (2% → 0.6% of lens coverage)
Colossus -1.2 pp (2.3% → 1.1% of lens coverage)
Chevron -1.2 pp (1.7% → 0.5% of lens coverage)
Colossus 2 -1.2 pp (1.6% → 0.4% of lens coverage)

Coverage share across the lens

Top-3 topics ≈ 33% of the lens's coverage, across ≈ 18 effective topics — a measure of how concentrated attention is across the set.

Alphabet +0.5 pp 14%

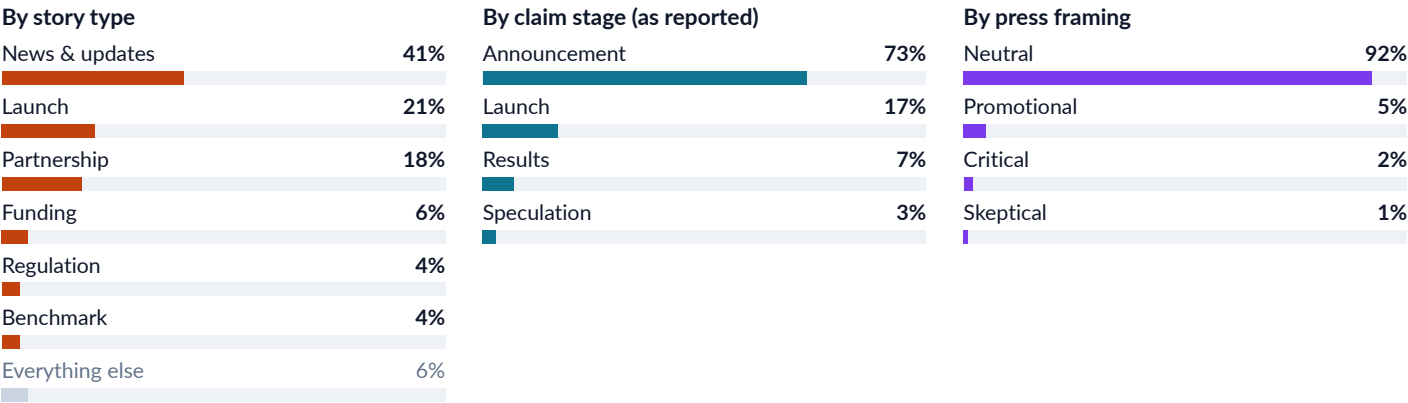
ByteDance +6.3 pp 11%



Δ = each topic's share shift, as defined under Momentum shifts. The month-by-month share chart is on the interactive report this file was exported from.

What the coverage is made of

Pooled across the whole lens — the kinds of stories the press runs, how far the reported work has progressed (as the press claims), and the framing.



Covered together

Across the full record, the most strongly connected pairing is Core Scientific and CoreWeave, covered together in 32 articles across acquisition, benchmark and partnership reporting, which helps explain why actor coverage groups around CoreWeave. In that same span, Ollama and vLLM share 28 articles, creating a separate coverage strand from the CoreWeave-centered cluster. Data centers and PJM share eight articles and sit in a cluster with ERCOT, so capacity coverage extends into regulation-focused reporting.

Pairings are ranked by connection strength: distinctiveness weighted by how many confirmed events link the pair and how far apart the two topics sit in the field, with a company's own product-family pairs set aside. So a pair can rank above another that shows a higher raw distinctiveness score or more shared articles — each card carries both numbers. Distinctiveness is normalized co-occurrence (NPML, -1 to 1): how much more often the pair shares stories than the two topics' separate coverage volumes alone would predict. Big topics co-occur often by volume alone; a high score means the pairing itself is the pattern. Each pairing also shows how many outlets its cited stories span: a pairing cited almost entirely by one specialist outlet is that outlet's editorial pattern, not necessarily a field-wide one. A measurement of shared coverage across Compass's full measured record, not only this report's window, and not a partnership or endorsement.

Core Scientific + CoreWeave actor-actor · acquisition, benchmark, other, partnership

32 shared · 0.66

Cited stories span 4 outlets.

- CoreWeave plans \$2B note offering to scale AI business while managing dilution Cointelegraph.com · 8 Dec 2025
- CoreWeave closed down 16% after CEO Mike Intrator admitted delays at a data center developer that Jim Cramer implied may be Core Scientific; CORZ fell 10%+ (Ashley Capoot/CNBC) Techmeme · 11 Nov 2025
- CoreWeave Shares Drop 9% on Weak Outlook and Data Center Delays, Core Scientific Fallout CoinDesk · 11 Nov 2025
- AI mania tanks CoreWeave's Core Scientific acquisition — it buys Python notebook Marimo TechCrunch · 31 Oct 2025

Crusoe + Starcloud actor-actor · launch, partnership

7 shared · 0.53

Cited stories span 4 outlets.

- Starcloud's path to 88,000 computing satellites SpaceNews · 27 May 2026
- Starcloud orders Starlink lasers for orbital data center network SpaceNews · 26 May 2026
- Space data center startup Starcloud raises \$170M at \$1.1B valuation SiliconANGLE · 31 Mar 2026
- Starcloud achieves unicorn status with \$170 million raise for orbital data centers SpaceNews · 30 Mar 2026

SB Energy + Stargate actor-actor · other, partnership

11 shared · 0.60

Cited stories span 4 outlets.

- OpenAI, SoftBank Invest \$1 Billion in Stargate Partner SB Energy Data Center Knowledge · 9 Jan 2026
- OpenAI, Oracle and Softbank announce five more Stargate Centers The Decoder · 25 Sep 2025
- OpenAI to build five more Stargate data centers in the US with Oracle and SoftBank SiliconANGLE · 23 Sep 2025
- OpenAI pushes ahead with Stargate as SoftBank remains absent from data center development The Decoder · 22 Jul 2025

Ollama + vLLM topic-actor · launch, other, partnership, release

28 shared · 0.52

Cited stories span 7 outlets.

- Ollama is still the easiest way to start local LLMs, but it's the worst way to keep running them XDA · 8 Apr 2026
- Securing the AI supply chain on GKE: Introducing k8s-aibom for automated AI BOMs Cloud Blog · 13 Jul 2026
- Palantir and Nvidia want to change who owns government AI The New Stack · 29 Jun 2026
- I replaced GitHub Copilot with a self-hosted AI and I won't go back XDA · 20 May 2026

data centers + PJM topic-actor · other, regulation

8 shared · 0.36

Cited stories span 7 outlets.

- PJM considering changes to interconnection reliability requirements for data centers following mass outage Data Center Dynamics · 13 Aug 2026
- 3.8 GW Load Drop Prompts Potential PJM Rules Data Center Knowledge · 12 Aug 2026
- US Energy Dept tells data centers to use backup generators during heatwave TechRadar · 3 Jul 2026
- Maryland citizens slapped with \$2 billion power grid upgrade bill for out-of-state AI data centers — state complains to federal energy regulators, says additional cost breaks 'ratepayer protection pledge' promises Tom's Hardware · 9 May 2026

CoreWeave + IREN actor-actor · partnership

14 shared · 0.50

Cited stories span 3 outlets.

- Bernstein Says IREN Pivot to AI Cloud Could Drive \$3.7B Revenue Cointelegraph.com · 18 Jun 2026
- CoreWeave Announces \$6B Deal With Trading Firm Jane Street Cointelegraph.com · 20 May 2026
- CoreWeave's \$8.5B Deal Signals Shift From Crypto Mining to AI Finance Cointelegraph.com · 9 Apr 2026
- Bitcoin Miner Bitdeer Liquidates Entire BTC Treasury, Holdings Fall to Zero Cointelegraph.com · 9 May 2026

CoreWeave + GB300 NVL72 actor-actor · launch, partnership, release

7 shared · 0.48

Cited stories span 4 outlets.

- CoreWeave's LOTA tech moves object data at high speed Blocks & Files · 16 Oct 2025
- CoreWeave to acquire data center builder Core Scientific for \$9B in stock SiliconANGLE · 7 Jul 2025
- Nvidia's newest top-tier AI supercomputers deployed for the first time — Grace Blackwell Ultra Superchip systems deployed at CoreWeave Tom's Hardware · 3 Jul 2025
- NVIDIA Vera Rubin NVL72 Delivers Leading Performance in MLPerf Inference v6.1 Debut NVIDIA Blog · 16 Sep 2026

IREN + Nebius actor-actor · partnership

5 shared · 0.43

Cited stories span 4 outlets.

- Nebius-Microsoft \$17.4B Deal Lifts AI Mining Stocks in Pre-Market Trading CoinDesk · 9 Sep 2025
- CoreWeave Announces \$6B Deal With Trading Firm Jane Street Cointelegraph.com · 20 May 2026
- Nvidia pumps over 40 billion dollars into AI partners so far in 2026 The Decoder · 11 May 2026
- CoreWeave's \$8.5B Deal Signals Shift From Crypto Mining to AI Finance Cointelegraph.com · 9 Apr 2026

data centers + ERCOT topic-actor · other, regulation

6 shared · 0.34

Cited stories span 6 outlets.

- 🔍 [Texas says data centers must pass an audit before connecting to the grid](#) The Verge · 4 Aug 2026
- 🔍 [Texas Halts Data Center Connections To Power Grid Amid Overwhelming Demand](#) Slashdot · 5 Aug 2026
- 🔍 [Texas electric grid moratorium won't have big impact on BTC miners: Bernstein](#) Cointelegraph.com · 4 Aug 2026
- 🔍 [AI's Volatile Power Use Quietly Tests Grid Limits](#) IEEE Spectrum · 3 Jul 2026

CoreWeave + TeraWulf actor-actor · other

7 shared · 0.42

Cited stories span 2 outlets.

- 🔍 ['Subprime data center crisis' could threaten the global economy in a way similar to the 2008 subprime mortgage debacle](#) TechRadar · 23 Jul 2026
- 🔍 [Bernstein Says IREN Pivot to AI Cloud Could Drive \\$3.7B Revenue](#) Cointelegraph.com · 18 Jun 2026
- 🔍 [AI, Bitcoin Mining Firms Tap High-Yield Bonds for Data Centers](#) Cointelegraph.com · 19 May 2026
- 🔍 [Bitcoin Miner Bitdeer Liquidates Entire BTC Treasury, Holdings Fall to Zero](#) Cointelegraph.com · 9 May 2026

Crusoe + Stargate actor-actor · launch

11 shared · 0.51

Cited stories span 4 outlets.

- 🔍 [Crusoe, Microsoft Expand Abilene AI Campus, Add 900 MW](#) Data Center Knowledge · 27 Mar 2026
- 🔍 [Oracle and OpenAI drop plans for mega Stargate AI US data center](#) TechRadar · 9 Mar 2026
- 🔍 [OpenAI's massive Stargate data center canceled as firm can't reach terms with Oracle, operator struggles with reliability issues — Meta said to be interested in snatching excess capacity](#) Tom's Hardware · 8 Mar 2026
- 🔍 [OpenAI follows Elon Musk's lead — gas turbines to be deployed at its first Stargate site for additional power](#) Tom's Hardware · 25 Jul 2025

DDN + WEKA actor-actor · benchmark, other, partnership

47 shared · 0.83

Cited stories span 2 outlets.

- 🔍 [VDURA takes aim at VAST, WEKA, DDN with AI-HPC storage reboot](#) Blocks & Files · 28 Jun 2025
- 🔍 [MinIO adds petabyte-scale MemKV cache for Nvidia GPU inference](#) Blocks & Files · 12 May 2026
- 🔍 [Graid sees cash potential in KV caching](#) Blocks & Files · 23 Apr 2026
- 🔍 [Dell turns up PowerMax dial to 11](#) Blocks & Files · 22 Apr 2026

Core Scientific + Crusoe actor-actor

3 shared · 0.42

Cited stories span 3 outlets.

- 🔍 [Core Scientific accelerates crypto-to-AI pivot](#) The Register · 27 Apr 2026
- 🔍 [The complicated AI infrastructure market](#) InfoWorld · 15 Sep 2026
- 🔍 [Neocloud Storm Gathers as Data Center Deals Stall](#) Data Center Knowledge · 6 Apr 2026

Chevron + data centers topic-actor · other

4 shared · 0.35

Cited stories span 3 outlets.

- 🔍 [Two Fossil Fuel Companies Are Betting Big on Data Centers](#) WIRED · 6 Aug 2026
- 🔍 [A Chevron Texas Power Plant Seeks School District Tax Break](#) WIRED · 11 May 2026
- 🔍 [Chevron selects West Texas for first natural gas plant to power data centers - report](#) Data Center Dynamics · 14 Nov 2025
- 🔍 [Natron's Failure May Not Spell Doom for Sodium-Ion Batteries](#) IEEE Spectrum · 6 Oct 2025

CoreWeave + Fluidstack actor-actor

4 shared · 0.40

Cited stories span 4 outlets.

- 🔍 [The complicated AI infrastructure market](#) InfoWorld · 15 Sep 2026
- 🔍 ['Subprime data center crisis' could threaten the global economy in a way similar to the 2008 subprime mortgage debacle](#) TechRadar · 23 Jul 2026
- 🔍 [Core Scientific Lands \\$500M Morgan Stanley Credit Line, Expandable to \\$1B](#) Cointelegraph.com · 5 Mar 2026
- 🔍 [VAST Data goes to Voltage Park](#) Blocks & Files · 17 Jun 2025

Fluidstack + TeraWulf actor-actor · funding, launch, other, partnership

18 shared · 0.76

Cited stories span 6 outlets.

- 🔍 [Anthropic signs \\$19bn, 20-year lease for Kentucky data center with TeraWulf](#) Data Center Dynamics · 6 Jul 2026
- 🔍 [TeraWulf's AI Revenue Surges 117% but Posts \\$427M Loss](#) Cointelegraph.com · 12 May 2026
- 🔍 [TeraWulf Dips 5% on \\$500M Capital Raise to Fund AI Data Center Expansion](#) CoinDesk · 29 Oct 2025
- 🔍 [Bitcoin Miner TeraWulf \(WULF\) Stock Jumps 25% on Positive AI News](#) Bitcoin Magazine · 28 Oct 2025

IREN + TeraWulf actor-actor · other, partnership, price_change

22 shared · 0.72

Cited stories span 3 outlets.

- 🔍 [TeraWulf Buys entucky Site for 1 GW AI Data Center Expansion](#) Cointelegraph.com · 28 May 2026

- 🔗 [Cipher Mining \(CIFR\) and TeraWulf \(WULF\) Get Morgan Stanley Nod; Marathon \(MARA\) Rated Underweight](#) Bitcoin Magazine · 9 Feb 2026
- 🔗 [Bitcoin Miner Hut 8 Shares Jump on \\$9.8 Billion AI Data Center Deal](#) Bitcoin Magazine · 20 Jul 2026
- 🔗 [VanEck: Bitcoin Miners Face \\$50B Funding Gap as AI Pivot Separates Winners From Losers](#) Bitcoin Magazine · 16 Jun 2026

data centers + FERC topic-actor 3 shared · 0.36
Cited stories span 3 outlets.

- 🔗 [FERC Targets Grid Rules for Data Centers, Large Loads](#) Data Center Knowledge · 18 Jun 2026
- 🔗 [70% of Americans oppose data centers near their homes, now less popular than nuclear power plants — opposition towards nearby AI infrastructure heating up as tech companies ramp up projects to acquire more compute](#) Tom's Hardware · 14 May 2026
- 🔗 [Why solar EPCs became construction's unlikely industrial AI pioneers](#) Solar Power World · 3 Jun 2026

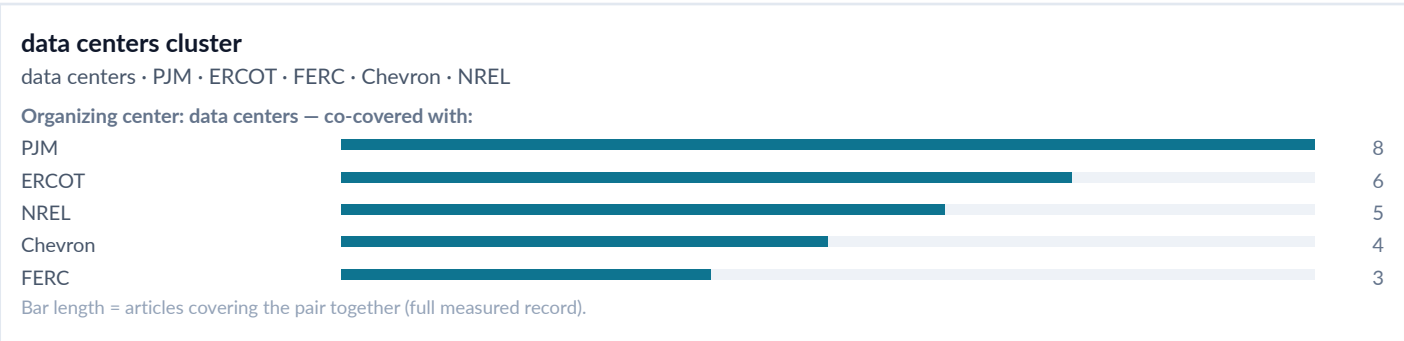
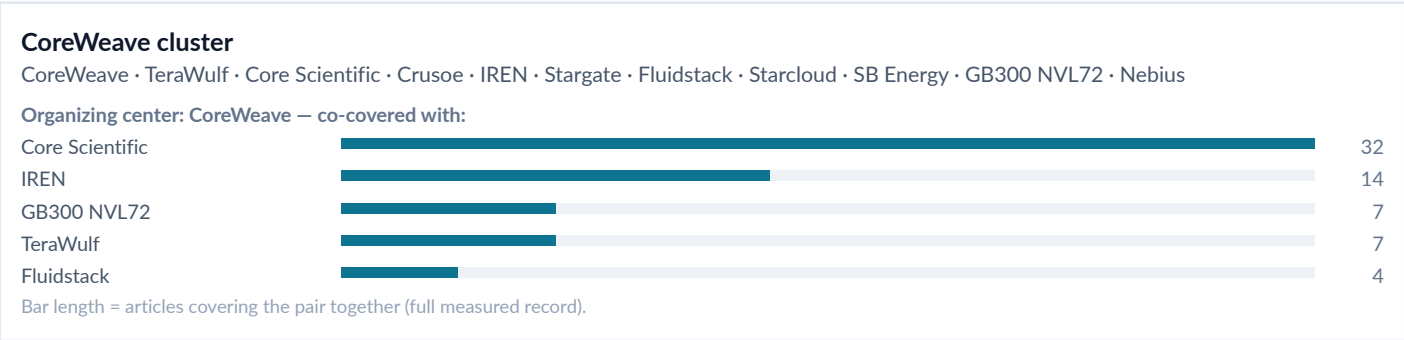
Core Scientific + TeraWulf actor-actor · other, partnership, price_change 14 shared · 0.67
Cited stories span 2 outlets.

- 🔗 [VanEck: Bitcoin Miners Face \\$50B Funding Gap as AI Pivot Separates Winners From Losers](#) Bitcoin Magazine · 16 Jun 2026
- 🔗 [Mining Stocks Outperform Bitcoin in 2026 Amid AI Pivot](#) Cointelegraph.com · 11 Jun 2026
- 🔗 [Canaan Posts \\$88.7M Net Loss in Q1 2026 as Bitcoin Prices Weigh on Mining Revenue](#) Cointelegraph.com · 20 May 2026
- 🔗 [BitGo Posts \\$3.8B Revenue, \\$60.7M Loss amid Bitcoin Decline and IPO Costs in Q1](#) Cointelegraph.com · 19 May 2026

data centers + NREL topic-actor 5 shared · 0.34
Cited stories span 3 outlets.

- 🔗 [AI's Volatile Power Use Quietly Tests Grid Limits](#) IEEE Spectrum · 3 Jul 2026
- 🔗 [How Clean-Energy Firms Adapt Messaging in the Trump Era](#) IEEE Spectrum · 28 Jan 2026
- 🔗 [3 Startups Join New IN2 Cohort Advancing Reliability in Built Environment](#) CleanTechnica · 26 Nov 2025
- 🔗 [Geothermal Energy Survives Trump's Tax Law](#) IEEE Spectrum · 22 Jul 2025

Coverage clusters



What to watch

At the gaining edge, Nscale, Nebius and Crusoe added 2.5 percentage points, 1.9 points and 1.2 points, so rising attention is broadening beyond the established leaders. Vera Rubin NVL72 added 1.1 points, while Crusoe and Starcloud share a seven-article launch-and-partnership thread, so peripheral attention is forming around both a named topic and lower-volume actor ties.

Representative cited sources (32)

The dated stories behind the read — each leading topic contributes its top stories, each linked.

Sources: a group of 10 banks is providing a \$22B loan to Blackstone and Alphabet's venture Crux AI, which provides compute for AI labs, to fund TPU purchases (Bloomberg) · Techmeme · 16 Sep 2026 · Alphabet

Waymo Plans to Offer Paid Robotaxi Rides in Singapore in 2028 · Bloomberg Technology · 18 Sep 2026 · Alphabet

ByteDance founder Zhang Yiming overtakes India's Gautam Adani to become Asia's richest person for the first time, passing \$105B, up 8x from \$13B in March 2019 (Bloomberg) · Techmeme · 16 Sep 2026 · ByteDance

TikTok's settlement priced release from a 2019 privacy order at \$100m. A judge has tentatively said the order stays. · The Next Web · 19 Sep 2026 · ByteDance

Enabling the next generation of AI data centers · Data Center Dynamics · 18 Sep 2026 · data centers

Huawei's OceanStor KV cache storage for hyper-scale AI data centers · Blocks & Files · 18 Sep 2026 · data centers

AWS bets that AI agents need an inbox, not another chat window · InfoWorld · 16 Sep 2026 · Ollama

Your AI agents' reports and questions have a new inbox, courtesy of AWS · The Register · 15 Sep 2026 · Ollama

CoreWeave: Physical AI Will Help Us Travel Safely, Not Kill Us All · Forbes - Innovation · 19 Sep 2026 · CoreWeave

What to expect during CoreWeave's 'Fully Connected' event: Join theCUBE Sept. 30-Oct. 1 · SiliconANGLE · 18 Sep 2026 · CoreWeave

Cerebras Co-Founder And Others Talk About AI Hardware · Forbes - Innovation · 18 Sep 2026 · Cerebras

A Hard Year For Software IPOs · Crunchbase News · 16 Sep 2026 · Cerebras

Axelera AI launches Europa chip, makes hardware available in Dell and Supermicro servers · Data Center Dynamics · 16 Sep 2026 · Supermicro

NVIDIA Vera Rubin NVL72 Delivers Leading Performance in MLPerf Inference v6.1 Debut · NVIDIA Blog · 16 Sep 2026 · Supermicro

Introducing Amazon SageMaker HyperPod Inference Gateway · AWS Machine Learning Blog · 18 Sep 2026 · vLLM

Reduce LLM latency with prefix-aware routing on Amazon SageMaker Inference · AWS Machine Learning Blog · 10 Sep 2026 · vLLM

Oracle tries to appease Stargate data center opponents with renewables push · Ars Technica · 11 Sep 2026 · Stargate

OpenAI targets Argentina's freezing Patagonia for \$25 billion 500MW Stargate AI data center — Green Capital and FlexDomes prep 120 to 3,000MW wind-powered server farms to skirt US backlash · TechRadar · 9 Sep 2026 · Stargate

Palantir selects Nebius as sovereign AI infrastructure provider · Data Center Dynamics · 8 Sep 2026 · Nebius

Palantir Taps Nebius for Sovereign AI Infrastructure Inside Its Perimeter · Unite.AI · 8 Sep 2026 · Nebius

Nvidia's Groq acquire is on the DOJ's radar, but it's already too late · The Register · 12 Sep 2026 · Groq

Piecemakers bets edge AI devices will diverge from reliance on HBM — custom-designed memory fuses DRAM stack directly to the processor using hybrid bonding · Tom's Hardware · 16 Sep 2026 · Groq

[Data center builder Nscale files for IPO after multibillion-dollar Anthropic deal](#) · SiliconANGLE · 19 Sep 2026 · Nscale

[AI cloud provider Nscale files to go public](#) · CNBC Technology · 18 Sep 2026 · Nscale

[Verizon powers American AI with billions-strong Corning fiber deal](#) · Data Center Dynamics · 9 Sep 2026 · Corning

[Verizon, Corning partner on 80+ million miles of high-density fibre](#) · ComputerWeekly.com · 9 Sep 2026 · Corning

[Alibaba Cloud, Cambricon Join PyTorch Foundation, Ant Group Takes Gold Seat](#) · Unite.AI · 8 Sep 2026 · Alibaba Cloud

[Alibaba sends AI 'digital employees' to work in rival apps from ByteDance, Tencent](#) · South China Morning Post Technology · 9 Sep 2026 · Alibaba Cloud

[PJM targets data centre demand with 6GW backstop auction; BESS expected to have competitive edge](#) · Energy-Storage.News · 8 Sep 2026 · PJM

[West Virginia solar project to pair lithium BESS with zinc long-duration energy storage](#) · Solar Power World · 8 Sep 2026 · PJM

[Crusoe CEO: Data Center Industry Has a 'Marketing Issue'](#) · Bloomberg Technology · 18 Sep 2026 · Crusoe

[Crusoe raises \\$3.9bn for AI data center build-out](#) · Data Center Dynamics · 18 Sep 2026 · Crusoe

Methodology

Every figure is drawn from the Enginerds corpus — a curated panel of technology outlets, each read at the same steady pace over time — and is a measurement of coverage WITHIN this lens: article counts, each topic's share of the set's coverage over time, the direction of that coverage, and which topics are covered together. Titles are shown as published; inclusion is not endorsement.

Topic share = that topic's measured articles divided by the sum of every lens topic's measured articles. An article covering several lens topics counts once for each of them, so shares measure attention to topics — not exclusive slices of unique articles. Lens entries are coverage topics, not mutually exclusive market participants — a company, its products and its models can each be topics, and their coverage overlaps.

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What this report does not claim. Compass measures coverage patterns in the technology press. It does not predict outcomes, rank technologies by merit or importance, or recommend what to buy, build, or invest in. Coverage is not the same as real-world significance.

Source: Enginerds Compass — measurements over a longitudinal technology corpus. Correlational & coverage-limited; not investment advice. © Enginerds.