US Data Center Daily Briefing

January 25, 2026

KEY THEMES

- Wisconsin pushback on data centre build-out
- European financial-sector resilience and new data centre plans
- Long-duration storage positioned for data-centre loads
- Server CPU capacity shifting toward AI/data centres
- Rising component price pressure (memory/NAND)
- Growing focus on cyber risk in core network virtualization (OVS)
- Environmental impact measurement tools for digital services

Top news (global)

- **Policy pushback in the US**: Environmental Coalition Calls For Pause In Data Center Development — a Wisconsin coalition is asking for a statewide pause on data centre development until a "10-point framework" is adopted (clean energy, ratepayer protection, environmental reporting).
- **Financial-sector resilience + new capacity plans in Europe**: Bundesbank President warns of 5,000 cyberattacks per minute — Deutsche Bundesbank says it repels **5,000+ cyberattacks per minute** and confirms plans for **three major data centres** in **France, Italy and Germany**.
- **Server supply chain tightening**: Intel pivots to Xeon for AI, impacting low-end PCs — Intel is shifting manufacturing capacity from client CPUs to **Xeon** to meet AI/data-centre demand; the article flags knock-on impacts including **~15–20%** consumer PC price rises in 2026 and projections for **memory prices >65% YoY** and **NAND up to 25%** in 2026.

Key deals & projects

Europe (France/Italy/Germany)

- Bundesbank President warns of 5,000 cyberattacks per minute
  - Confirms plans for **three major data centres** located in **France, Italy and Germany** (no MW/capex/timelines disclosed).
  - Context: the bank frames this within operational resilience (cyber + crisis readiness) and support for a **digital euro** described as a "digital twin".

North America (US)

- Eos launches Indensity BESS to boost grid and data centers
  - Eos Energy Enterprises launched **“Indensity”**, a **zinc-based** battery energy storage system architecture paired with **AI-enabled “DawnOS”**.
  - Positioned for **grid reliability** and **high-demand loads such as data centres**, highlighting **4–16+ hour** long-duration capability and “expanding U.S. manufacturing capability” (no project pipeline or pricing disclosed).

Power, grid & interconnection highlights

- **Long-duration storage as a data-centre adjacency theme**: Eos launches Indensity BESS to boost grid and data centers
  - The announcement emphasizes **multi-hour (4–16+ hour)** duration—relevant to grid-constrained markets where firming/peak shaving and resilience are central questions for new large-load interconnections.

Policy & regulation

United States (Wisconsin)

- Environmental Coalition Calls For Pause In Data Center Development
  - The **Clean Economy Coalition of Wisconsin** calls for a **statewide pause** on data centre development until a “comprehensive, 10-point framework” is in place.
  - The coalition contrasts its proposal with a **recently passed Republican-backed Assembly bill** that would:
    - require **on-site renewables**, and
    - direct the **Public Service Commission** to **limit ratepayer exposure** to data-centre infrastructure costs.

Technology, cybersecurity & operations (implications for data-centre investors)

Cyber/operational resilience

- Bundesbank President warns of 5,000 cyberattacks per minute
  - The bank reports defending against **5,000+ cyberattacks per minute**, underscoring the increasing operational-security bar for critical workloads.

- Side-channel attacks exploiting Open vSwitch cache hierarchy remotely
  - An arXiv paper (submitted **22 Jan 2026**) describes **three remote side-channel attacks** against **Open vSwitch (OVS)** cache hierarchy: **remote covert channels**, **header recovery**, and **packet rate monitoring**; includes evaluation of mitigation solutions.

Compute supply/demand and pricing signals

- Intel pivots to Xeon for AI, impacting low-end PCs
  - Intel is reallocating manufacturing capacity toward **server CPUs (Xeon)** to meet AI/data-centre demand; the piece expects constrained low-end PC supply in 2026 and flags broader component price pressure (notably memory).

Environmental measurement and reporting signals

- Calculator measures environmental cost of each internet search
  - University of Exeter and Madeby.studio released **"Digital Impact for Species"**, a tool grading websites **A+ to F** using **CO_2, energy, water use and biodiversity effects**, based on **Google PageSpeed Insights** (page weight + hosting energy sources).
  - Notes the internet is estimated at **3.7% of global emissions** (as stated in the story), adding momentum to measurement-led scrutiny across digital infrastructure.

2-line close

Regulatory scrutiny and stakeholder expectations around large-load growth are broadening, alongside rising focus on operational resilience. Technology and power solutions are converging around higher-density demand and more measurable environmental outcomes.

Track any ISO, state, county, or company in the US data center build-out — Telborg tracks power, permitting, new projects and legislation exclusively from trusted sources

Telborg Pro · $189/mo →

or book a 20-min call →