

# 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).
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## 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.
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## 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.
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## 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<sub>2</sub>, 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.

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## 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.

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