US Data Center Daily Briefing

February 10, 2026

KEY THEMES

- EU Taxonomy-aligned data centres (Berlin)
- Routing/security research support via hyperscale-like infrastructure
- Public market catalyst: Cipher Mining results timing
- Cloud platform feature expansion (Mumbai, Roubaix)
- AI/LLM inference efficiency research (near-storage processing)

Top news (3)

- maincubes confirms EU Taxonomy alignment for BER01 (Berlin), following its earlier FRA02 alignment (2024). This is a notable signal for EU-focused capital seeking taxonomy-aligned digital infrastructure exposure.
- OVHcloud backs University of Strasbourg's bgproutes.io BGP research, providing compute, hosting, Bare Metal and network-engineering support for large-scale route collection, real-time visualisation and anomaly detection.
- Cipher Mining sets date for Q4 and full-year 2025 results (release before market open on 24 Feb 2026; call/webcast at 8:00 a.m. ET). For investors, this is a near-term catalyst for disclosure on bitcoin-mining data centre and HPC hosting operations.

Key deals & projects

Europe

- **Network research / internet routing observability (France)**
  - OVHcloud supports University of Strasbourg's bgproutes.io: OVHcloud will provide **compute, hosting, Bare Metal infrastructure, and network-engineering expertise**.
  - Project scope includes **large-scale BGP route collection**, **real-time visualisation**, **anomaly detection**, and integration of analytical tooling including **machine learning capabilities**.

United States

- **Public markets / earnings catalyst (US-listed)**

- Cipher Mining schedules Q4 and Full Year 2025 results call: results due **24 Feb 2026 (pre-market)** with a **conference call and webcast at 8:00 a.m. ET**.
- Company context provided: Cipher operates **industrial-scale data centers for bitcoin mining and HPC hosting**.

Power & grid / interconnection highlights

- No power procurement, grid interconnection, transmission, or utility-counterparty developments were included in today's story set.

Policy, regulation & sustainability disclosures

Europe (EU)

- **EU Taxonomy verification (Germany)**
  - maincubes' BER01 data center in Berlin verified as EU Taxonomy-aligned (announced 9 Feb 2026).
  - maincubes notes BER01 is its **second** EU Taxonomy-aligned data centre after **FRA02 (2024)**; operating footprint includes **Frankfurt, Berlin, and Amsterdam**.

Technology and operating model updates (relevant to capacity efficiency)

Cloud services (OVHcloud)

- Tranches de Tech podcast: AI and Cloud service updates: OVHcloud highlighted multiple Public Cloud product updates, including:
  - **Managed Private Registry** now available in **Mumbai (APAC)**.
  - **MKS** available in **Mumbai** and **Roubaix**.
  - **File Storage RWX** in **public beta**.
  - **Floating IPs for MKS**.

Compute architecture / energy efficiency research

- Near-Storage Processing Boosts Offline Inference for Long-Context LLMs: authors introduce **HILOS**, a near-storage processing framework that offloads attention operations to near-storage accelerators.
  - Reported results (on a system with **16 SmartSSDs**): up to **7.86x throughput** and up to **85% reduction in energy consumption** (offline inference, long-context LLMs).

2-line close

Today's set was dominated by Europe-facing sustainability verification and network-resilience research support, with limited new information on grid access or power contracting. Near-term investor attention may skew to scheduled earnings disclosures and cloud platform capability rollouts.

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