

# US Data Center Daily Briefing

February 12, 2026

## KEY THEMES

- Behind-the-meter gas generation scaling for AI/HPC loads
- Virginia data center reform bills in motion; several defeated
- Onsite gas plant proposals driven by delayed utility interconnection timelines
- EU CSA2 could restrict high-risk ICT suppliers and impose turnover-based penalties
- Federal cloud modernization demand signal via FedRAMP High migrations
- Post-quantum cryptography programs extending into cloud and e-government through 2028
- Operational tech focus: GPU telemetry, secure disaggregated storage, and multi-tenant LLM protections

## Top news (3)

1. Behind-the-meter gas generation is scaling quickly for US AI/HPC loads: [INNIO to supply 1.5 GW behind-the-meter power to VoltaGrid](#) via 300 Jenbacher gas engines (25MW blocks) delivered by 2028.
2. Virginia's data center policy debate is intensifying: a statewide coalition is pushing "comprehensive reform," while multiple bills have already failed committee and others remain live: [Virginia coalition urges statewide data center reform in Richmond](#).
3. The EU is moving toward stronger ICT supply-chain controls that could affect data center operators and critical digital infrastructure procurement: [EU proposes ICT supply chain security framework under CSA2](#), including high-risk supplier designations and potential penalties tied to global turnover.

## Key deals & projects

### United States

- **Behind-the-meter generation platform build-out**
  - [INNIO to supply 1.5 GW behind-the-meter power to VoltaGrid](#):
    - Volume/timeline: **1.5GW** to be delivered by **2028**.
    - Configuration: **300** Jenbacher gas engines (**Type J624 and J620**) packaged into **25MW** units.
    - Productization: integrated into VoltaGrid's **QPac™** platform.

- Use case: targets **AI and high-performance computing data centers** across the US.
- Operating modes: **prime, backup, and peaking power**; explicitly positioned as “without batteries.”
- **Crypto-to-data center development pivot (governance signal)**
  - [Cipher Appoints Thomas Duda to Board of Directors for Expansion](#): Cipher Mining appoints Thomas Duda (VP Real Estate, Henry Crown and Company) to support its pivot to **industrial-scale data center development and operations**.
- **Federal cloud modernization demand signal**
  - [Oracle Cloud Infrastructure to modernize CMS mission-critical systems](#): CMS selects **Oracle Cloud Infrastructure** to consolidate/migrate select on-prem workloads using **FedRAMP High-authorized** infrastructure, with integrated analytics and AI capabilities.

## Europe

- **On-prem / hybrid positioning for regulated workloads**
    - [OVHcloud promotes On-Prem Cloud Platform for strategic autonomy](#): OVHcloud outlines an on-site cloud platform aimed at **regulated sectors** (industry, healthcare, public sector), including support for **AI services, edge**, and **air-gapped** deployments, and positioning around **open standards** to minimize lock-in.
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## Power, grid & interconnection highlights

### United States (Virginia)

- **Onsite gas plant proposed due to grid delivery timing**
  - [Remington data center seeks onsite 13-turbine gas power plant](#):
    - Scope: onsite **primary gas-fired** plant with **13 turbines**, plus a **natural gas gate station** and an **electrical substation**.
    - Rationale cited: applicant says **Dominion cannot supply grid power until 2030 earliest**.
    - Permitting: applied for an **Article 6 Minor NSR air permit**.
    - Next step: comments urged ahead of the **Fauquier County Planning Commission** work session **Feb. 19**.
- **System-level takeaway for investors**: the combination of long utility timelines and local opposition/permitting complexity is reinforcing a shift toward **behind-the-meter** solutions

(as also reflected in the VoltaGrid/INNIO order).

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## Policy & regulation

### United States (Virginia)

- **State legislative activity on data centers**
  - [Virginia coalition urges statewide data center reform in Richmond:](#)
    - The Virginia Data Center Reform Coalition conducted a Richmond “lobby day,” meeting **80+ legislative offices**.
    - Bills defeated in House Finance Committee: **HB658, HB589, HB155**.
    - Bills still under consideration (including amended items): **SB253 (amended), SB619, SB553, SB339, HB897**.

### European Union

- **Proposed supply-chain security framework (CSA2) with enforcement hooks**
  - [EU proposes ICT supply chain security framework under CSA2:](#)
    - Mechanism: a **five-step** ICT supply chain security process enabling the EU to designate “**countries of concern**” and list **high-risk suppliers**.
    - Impacted entities: measures can apply to **NIS2 entities** (including prohibitions and mitigations).
    - Timelines: security assessments within **6 months**; exemption decisions within **9 months**; example transition timeline noted as **36 months for mobile networks**.
    - Penalties: up to **1% / 2% / 7%** of worldwide turnover (enforced by Member States’ **NIS2 competent authorities**).

### Europe (Ukraine / Horizon Europe)

- **Post-quantum cryptography program expansion**
    - [Ukraine joins European post-quantum cryptography project QARC consortium:](#) Ukraine joins the Horizon Europe **QARC** project (11 European countries), with work through **2028** covering post-quantum protocols (Kerberos, PKI, TLS) and quantum-resistant cloud storage/e-Government/e-Voting solutions.
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## Tech & operations watchlist (selected research)

- **GPU telemetry for AI governance:** [Timing and Memory Telemetry on GPUs for AI Governance](#) proposes primitives to detect compute utilization without trusted firmware or vendor counters.
  - **Storage security with minimal overhead:** [Hazel: Secure and Efficient Disaggregated Storage for Data Centres](#) extends NVMe-oF under a confidential computing model; prototype reports ~1-2% performance degradation on tested workloads.
  - **Multi-tenant inference side-channel mitigation:** [Selective KV-Cache Sharing Mitigates Timing Side-Channels in LLMs](#) describes selective KV-cache sharing to prevent API-visible timing side-channels while improving performance vs full isolation.
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## 2-line summary

Behind-the-meter generation and onsite gas proposals are increasingly being positioned as practical answers to long grid timelines for AI/HPC growth. EU supply-chain security and active US state-level policy debates are adding another layer of execution and compliance risk to platform expansion.

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