TELBORG

Data Center Briefing

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Global

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.

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).

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.

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.

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.