

Data Center Briefing

January 25, 2026

Global

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 **CO₂, 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.