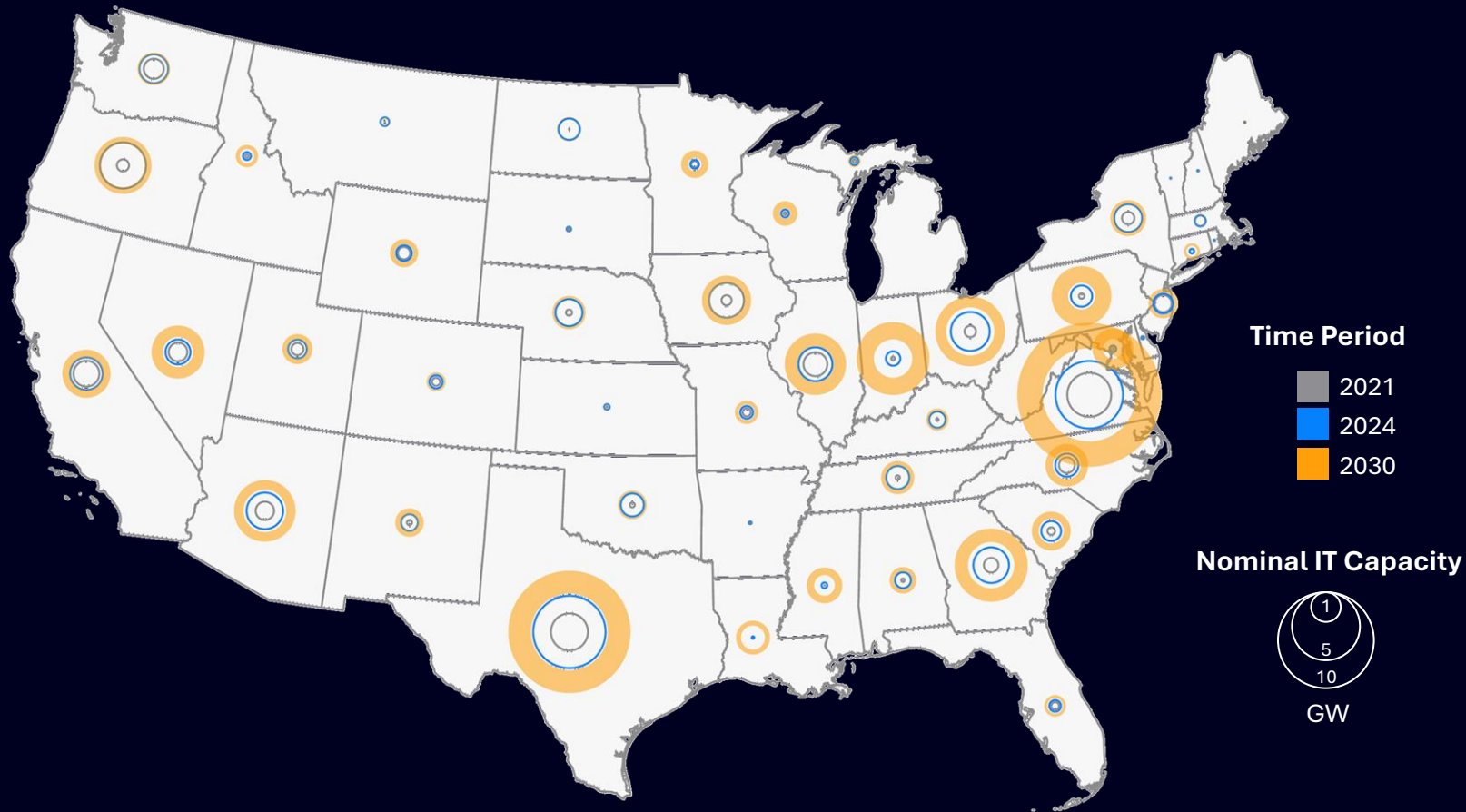


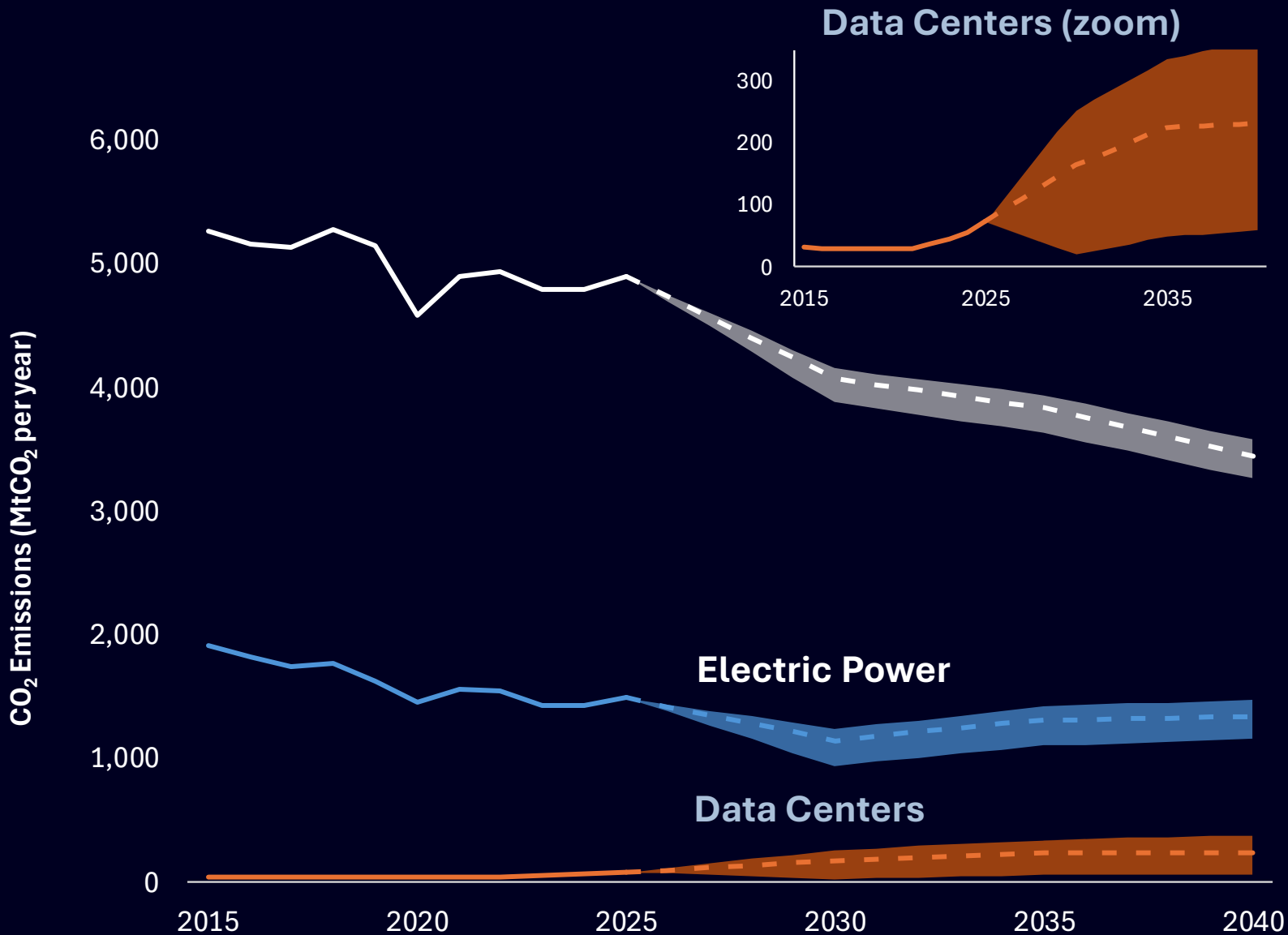
U.S. Data Center Capacity by State



- Large markets continue to grow while new markets emerge.
- 2030 projections much lower than power requests
- In 2030, 8 states with more than 20% of electricity going to data centers
- Single facilities > 1GW. Plans for up to 17GW.
- Grid operational issues are an immediate focus:
 - Ride-through – On July 22, 3.8GW DC load dropped in seconds in Virginia
 - Rapid load changes - 40-50% up and down
 - Oscillations – potentially damaging electric equipment

Source: EPRI Powering Intelligence 2026

Data Center Growth Impact on Total U.S. CO₂



Data center CO₂ emissions uncertain

Range reflects variation in data center demand growth plus carbon-free energy (CFE) procurement

Economy-wide emissions could continue to decline with efficiency and electrification

Electricity emissions could increase

Assumes current federal and state policies. Based upon modeling from powering-intelligence.epri.com

Cohort 1

ARIZONA, U.S.

Compute Flexibility
Artificial Intelligence



NORTH CAROLINA, U.S.

Compute Flexibility
Hyperscaler



PARIS, FRANCE

Grid Services
Co-Located



Initial Demo Sites:



DCFlex
demonstrations



Cohort 2

ILLINOIS, U.S.

Compute Flexibility
Artificial Intelligence



TEXAS, U.S.

HVO Backup Solution



VA -- IL, U.S.

Compute Flexibility
AI & Geospatial Load Shifting



VIRGINIA, U.S.

Large Scale Compute
Flexibility



LONDON, UK

Compute Flexibility



TEXAS, U.S.

Compute and HVAC Load
Flex – Paired with BESS



ORACLE

