Delivering Data Centre Infrastructure at Scale: *Emerging Technologies and Business Models*

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NOVEMBER 10, 2026



Brattle

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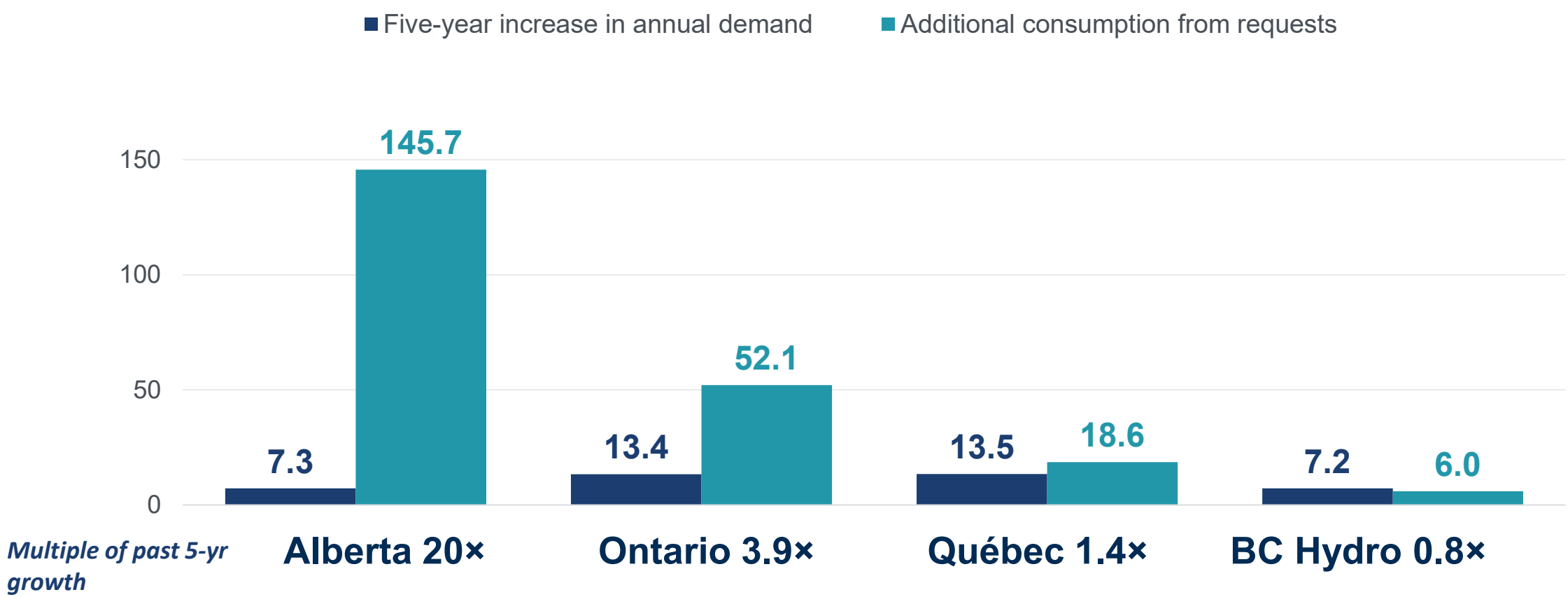
LOCATIONS

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Gross requests vastly exceed last five-year demand increase

Potential data centre consumption compared with the five-year increase in annual demand | TWh per year



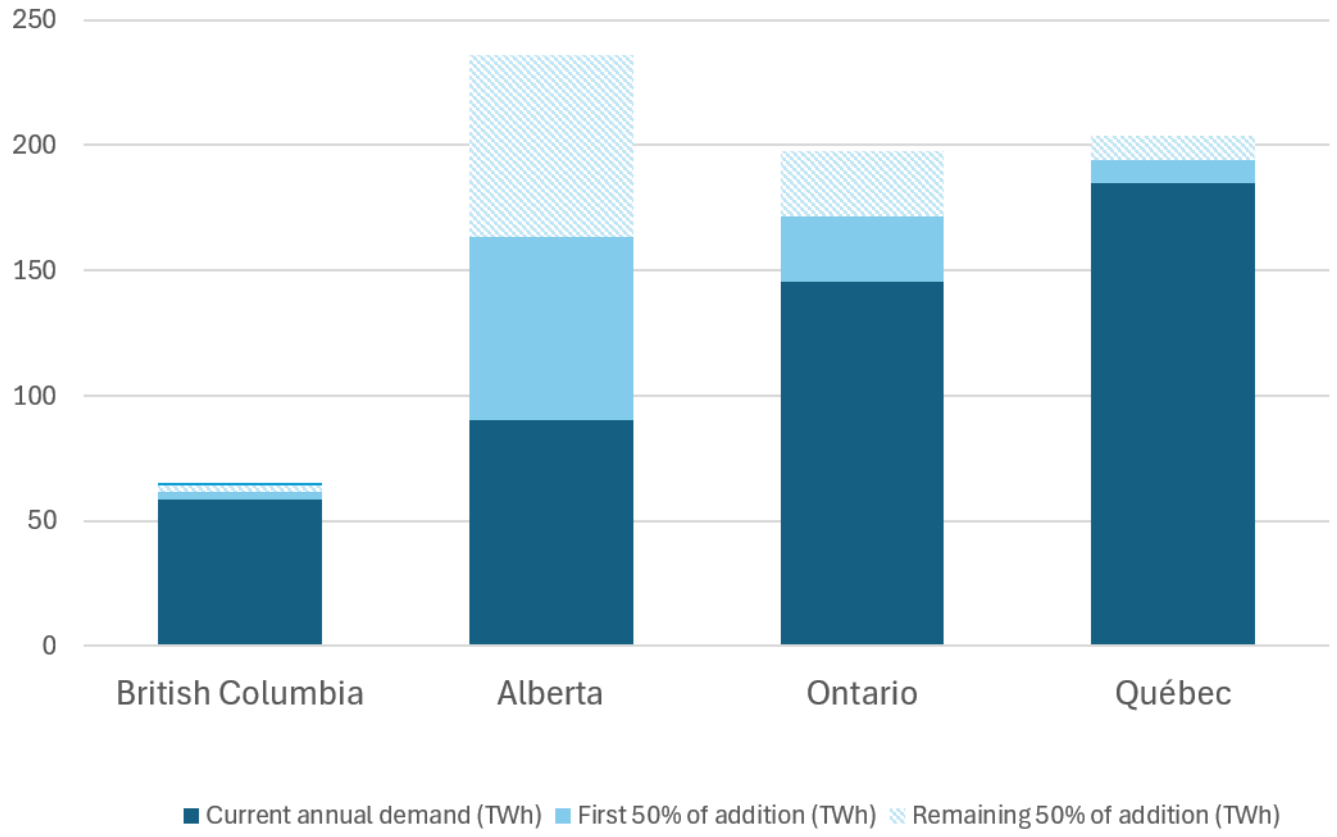
Base case: all requests connect and reach requested peak MW, with an 85% operating load factor.

Historical change: 2020 to 2025, except BC Hydro FY2020/21 to FY2025/26.

Sources: IESO, GoA/AESO, Hydro-Québec, BC Hydro. Requests: AB Jul 2026; ON summer 2026; QC Oct 2026; BC 2026 intake.

Impact of Data Centres on Large Province Load

Current annual electricity demand and potential additional data centre consumption | TWh per year



Demand basis: 2025, except BC Hydro FY2025/26. Alberta includes self-supply; Québec and BC Hydro use domestic utility sales.

Sources: IESO, GoA/AESO, Hydro-Québec, BC Hydro. Requests: AB Jul 2026; ON summer 2026; QC Oct 2026; BC 2026 intake.

Big Questions – Big Opportunity or Big Headache!

Where will the supply come from to meet demand?

How will they connect without adversely impacting the grid?

How can the outsized risks to existing consumers be managed?