DATA CENTER COALITION

Data Centers:

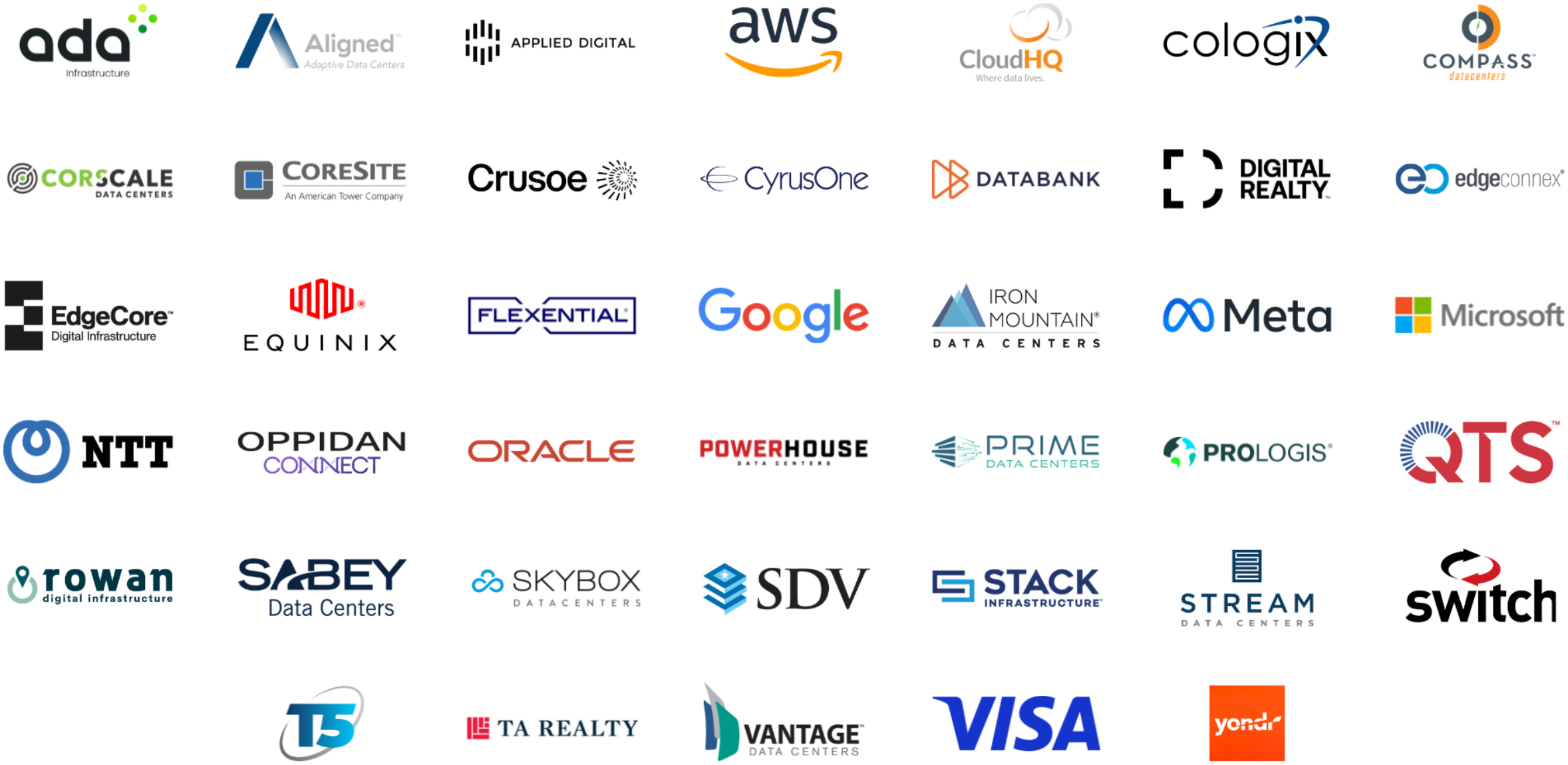
Powering the Internet & our Modern Economy

April 17, 2026

Data Center Coalition:

- **The Voice** of the data center sector
- **Advocates** for a business climate, policies, and investments that support the growth and competitiveness of the industry
- **Information Resource** for elected officials, candidates, community leaders, and other stakeholders

Data Center Owners/Operator Members



Large End User Members

ANTHROPIC

CoreWeave

OpenAI

Associate Members

(Pre-Operational)

Beale Infrastructure

CleanArc DATA CENTERS

FLEET DATA CENTERS

MONTERA INFRASTRUCTURE

Industry Advisory Council

ALL4

CATERPILLAR®

CLAYCO THE ART & SCIENCE OF BUILDING

CLUNE CONSTRUCTION

EATON Powering Business Worldwide

HOLDER

Johnson Controls

McCARTHY

RYAN

Life Is On Schneider Electric

VERTIV.

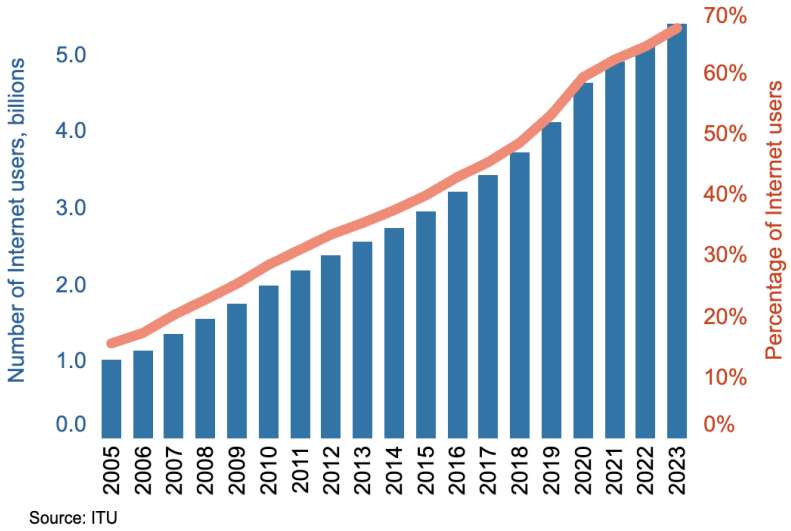
Number of People/Devices Drives Data Center Demand

"The data center industry has experienced explosive growth over the past decade, driven by ever-increasing demand for cloud services and the expanding use of web-enabled devices globally. […] **In the next five years, consumers and businesses will generate twice as much data as all the data created over the past 10 years**."

- JLL, *Data Centers 2024 Global Outlook*

More People Are Getting Online

- Approximately 5.4 billion people - or 67% of the global population - are online today. This represents an **increase of 45% since 2018**. 2.6 billion people are not yet connected to the internet.
- On average, U.S. households have a total of **21 connected devices**.



Source: ITU

Sources: JLL, Data Centers 2024 Global Outlook, https://www.us.jll.com/content/dam/jll-com/documents/pdf/research/global/jll-data-center-outlook-global-2024.pdf
International Telecommunication Union, https://www.itu.int/en/ITU-D/Statistics/Pages/stat/default.aspx
Deloitte "Shiny new devices may be bringing joy, but who's protecting consumer data?", January 23, 2023 https://www2.deloitte.com/us/en/insights/industry/technology/consumer-data-privacy.html

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New Products/Experiences/Applications Drive Demand

- Cloud Services
- Generative AI
- Business Apps
- Healthcare
- Internet of Things/Connected Devices
- Streaming Video
- Virtual/Augmented Reality
- eCommerce
- Machine Learning
- Payment Processing
- Online Learning
- Autonomous Vehicles
- Innovation!

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Data Center Models

2 Main Types of Data Centers

Self-Perform/Enterprise

Business owns/controls servers and peripherals, may own facility

Multitenant and Build to Suit

Facility owner leases to one or more tenants

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Key Siting Considerations Include

- Time to Market
- Access to Fiber/Connectivity
- Access to Water for Industrial Purposes
- Access to Clean, Reliable, Affordable Energy
- Climate and Risk of Natural Disaster
- Land Availability and Cost
- Tax and Regulatory Climate
- Ownership/Occupancy Costs
- Access to Skilled Construction and Technology Workforce

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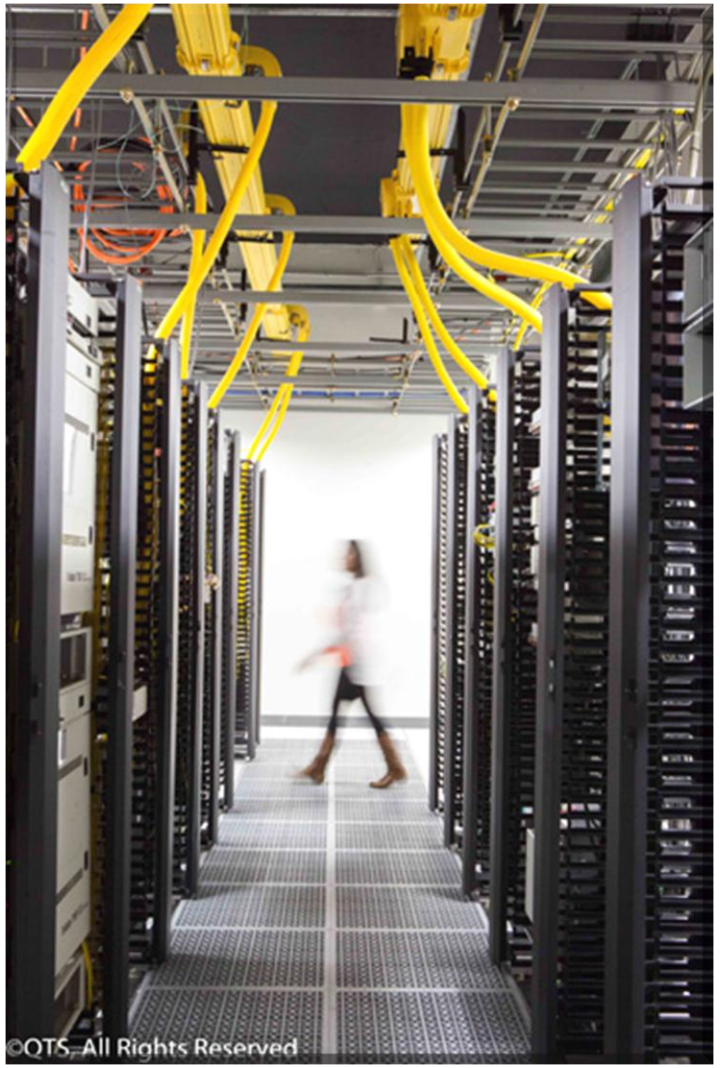
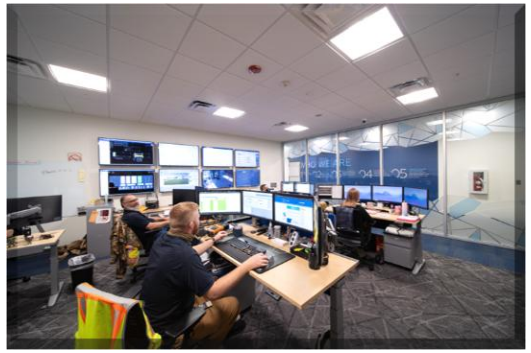
Inside a Data Center

- Building Shell
- Interior Space
- Security
  - Exterior
  - Interior
  - Cyber
- Servers
- Fiber/Networking Connectivity
- Reliable Power 24/7
  - Grid & Backup Generation
- HVAC/Cooling





U.S. Data Center Industry

Jobs

- **603,900 direct jobs** in 2023—51% increase from 2017
- **4.7 million in total employment** in 2023—60% increase from 2017
- **$404 billion in total labor income** in 2023—93% increase from 2017

GDP

- **$3.5 trillion in GDP impact** between 2017-2023

Taxes – Federal, State, and Local

- **$162.7 billion in total impact** in 2023 - 146% increase from 2017

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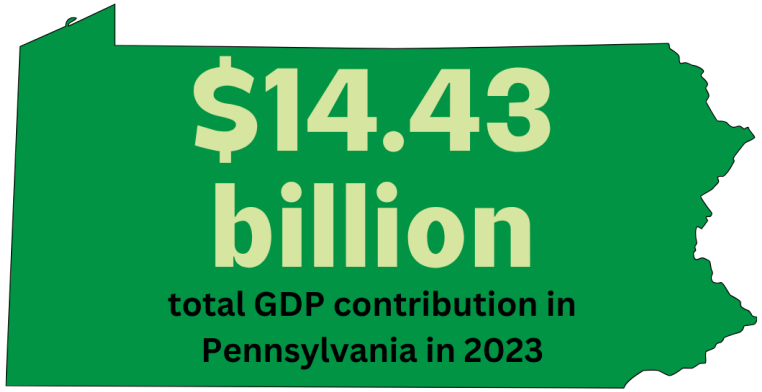
Source: PwC, "Economic Contributions of Data Centers in the United States, 2017-2023," February 2025

Pennsylvania Data Center Industry

Jobs

- 2023 **direct** employment: **18,270**
- 2023 **total** (direct, indirect, and induced) employment: **99,150**



Labor Income

- 2023 **total** (direct, indirect, and induced) labor income: **$8.35 billion**

GDP and Taxes Impact

- **$14.43 billion** (direct, indirect, and induced) to Pennsylvania GDP in 2023
  - **9% increase** since 2022
- **$1.36 billion** (direct and indirect) in state and local tax revenues in 2023

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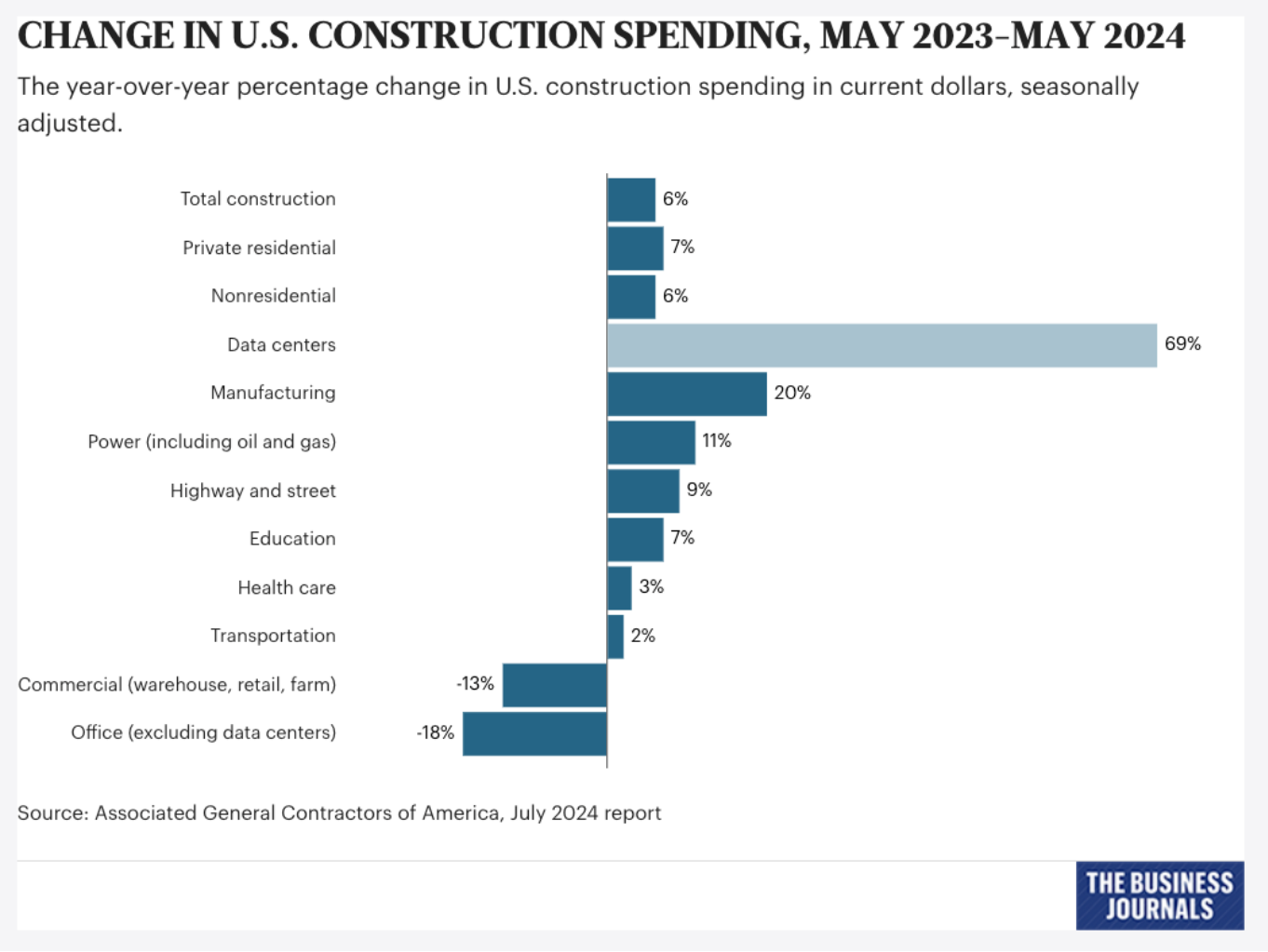
Source: PwC, "Economic Contributions of Data Centers in the United States, 2017-2023," February 2025

Data Center Trends



Source: Atlanta Business Chronicle, $1B data centers adds to growing list of massive projects; offsets construction slowdown, Oct. 4, 2024, https://www.bizjournals.com/atlanta/news/2024/10/04/1b-data-center-pitched-for-coweta-county.html

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Data Center Industry Drives Job Creation & Workforce Development

Deborah Martinez Castellanos checks out the rooftop chillers at the data center where she works to ensure they are functioning properly.

By Te-Ping Chen Follow | Photographs by Maansi Srivastava for WSJ
Aug. 14, 2024 5:30 am ET

THE WALL STREET JOURNAL.

BUSINESS

Data Centers Are a 'Gold Rush' for Construction Workers

Surging demand means six-figure pay and more perks

By Te-Ping Chen Follow
Nov. 29, 2025 8:00 pm ET

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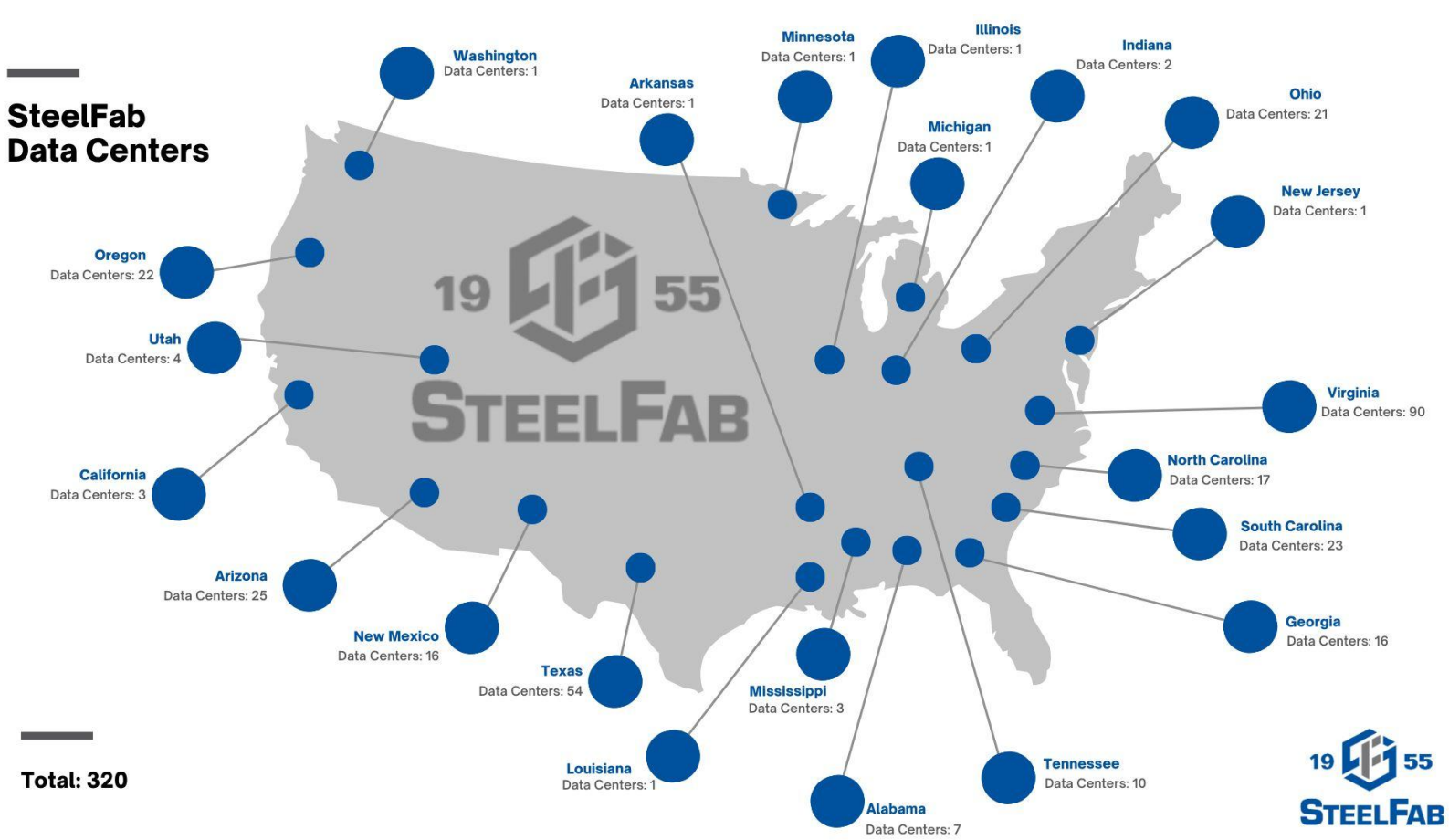
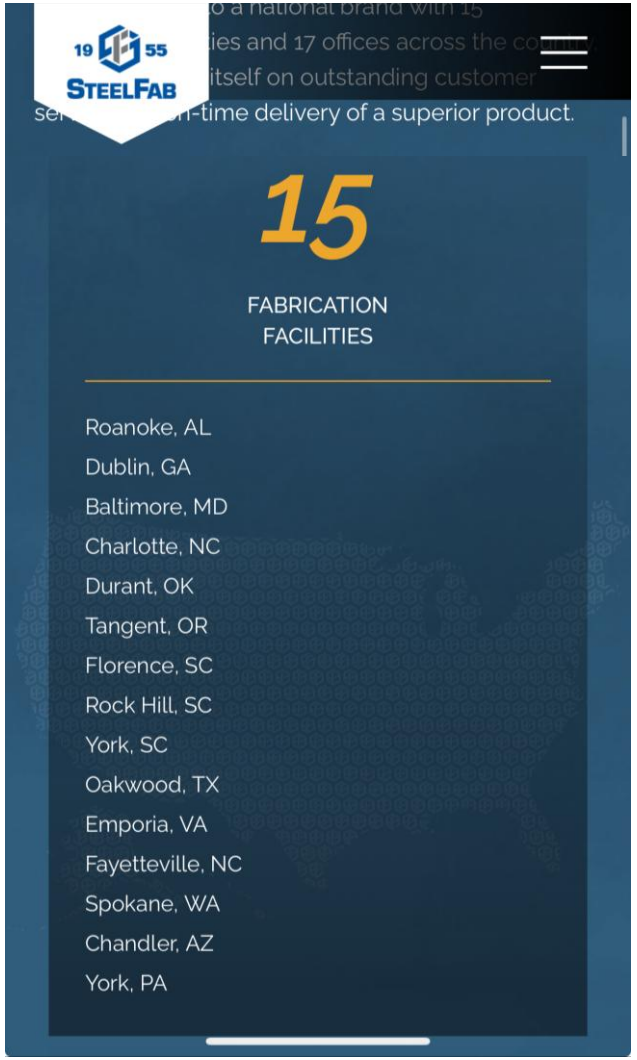
Sources: The Wall Street Journal, "The Tech Job Paying Six Figures, No College Degree Required", Aug. 14, 2024 & The Wall Street Journal, "Data centers Are a 'Gold Rush' for Construction Workers", Nov. 29, 2025

Data Center Ecosystems

Data centers establish and grow business ecosystems in every market where they operate.





Source: SteelFab, https://www.steelfab-inc.com/project/data-centers/

Data Center Tax Revenues Support Affordability

"Thus, under this Budget, the average taxpaying household in the "county" part of Mecklenburg County will be asked to contribute almost $100 less than last year! **That is the 'Data Center Dividend**.'"

MECKLENBURG COUNTY Virginia

Source: https://www.mecklenburgva.com/DocumentCenter/View/946/THE-FINAL-DOC-FY-26

Data Center Tax Revenues Help Address Local Priorities

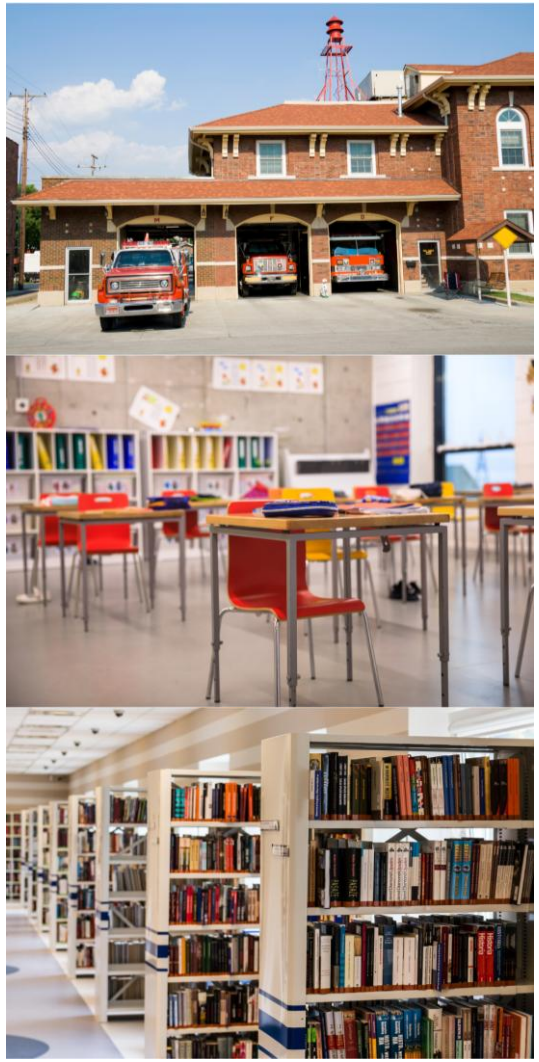
2022 Local Tax Benefit For Every
$1 Spent on Local Services

Loudoun County

$1.00 → $26.00

Prince William County

$1.00 → $13

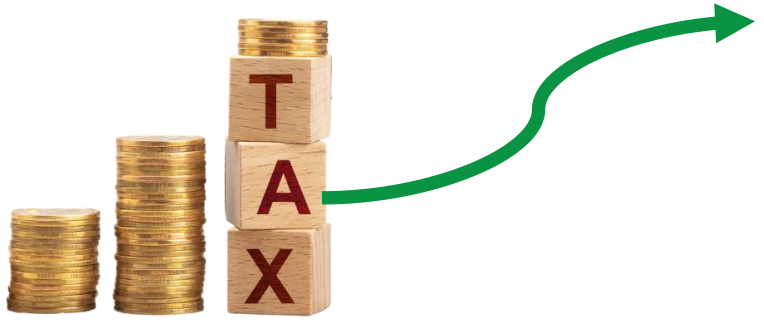


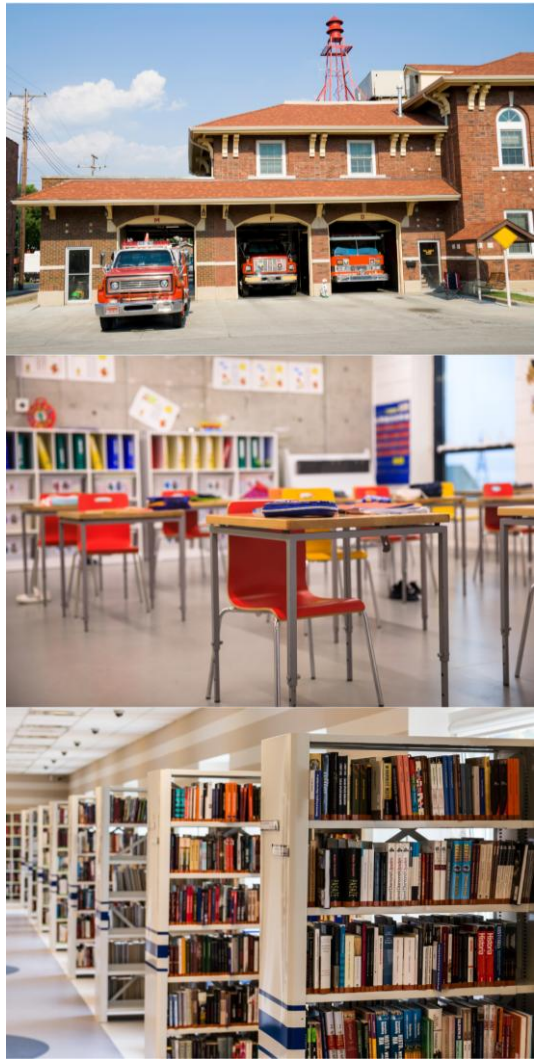
Source: NVTC Report: The Economic and Fiscal Contribution that Data Centers Make to Virginia, January 2022 (Mangum Economics)

Data Center Tax Revenues Help Address Local Priorities

Red Oak, Texas:

- To put it in perspective, with $13 billion in data center investments already underway, and more in our development pipeline, **these facilities are set to quadruple our city's total taxable land value.**
- **Moreover, since most of the land on which these data centers are being built was previously tax-exempt, these investments have brought and continue to bring an increase to our city revenue**.
- **These new funds allow us to make meaningful investments**, supporting education, strengthening public safety, expanding infrastructure and creating spaces for recreation and connection, all to enhance the quality of life for our residents.





Source: https://www.dallasnews.com/opinion/commentary/2025/02/05/red-oak-mayor-data-centers-are-critical-for-texas-communities/

Data Centers and Water Use

Data centers are estimated to use approximately 39 billion gallons per year (BGY) of water in 2025.

That is compared to:

- **Utility water leakage: 2,500 BGY**
  - 18% of municipal treated water is lost to leakage
- **Food and beverage industry: 533 BGY**
- **Semiconductor industry: 59 BGY**

According to the Joint Legislative Audit and Review Commission in Virginia, the world's largest data center market, **83% of data centers use as much, if not less, water than a large commercial office building**. The report also found data center water use in the state is sustainable.

Source: Bluefield Research, U.S. Water for Data Centers: Market Trends, Opportunities, and Forecasts, 2025–2030, May 29, 2025, https://www.bluefieldresearch.com/research/u-s-water-for-data-centers-market-trends-opportunities-and-forecasts-2025-2030/?utm_content=349981779&utm_medium=social&utm_source=linkedin&hss_channel=lcp-3082084

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Data Centers and Water Use

Cooling Types:

- Air cooling
- Liquid cooling
- Immersion cooling
- Evaporative cooling
- Hybrid cooling strategy

Local factors that may affect the type of cooling used:

- Humidity
- Climate/temperature
- Availability of water
  - Recycled
  - Non-potable
  - Harvested rainwater sources

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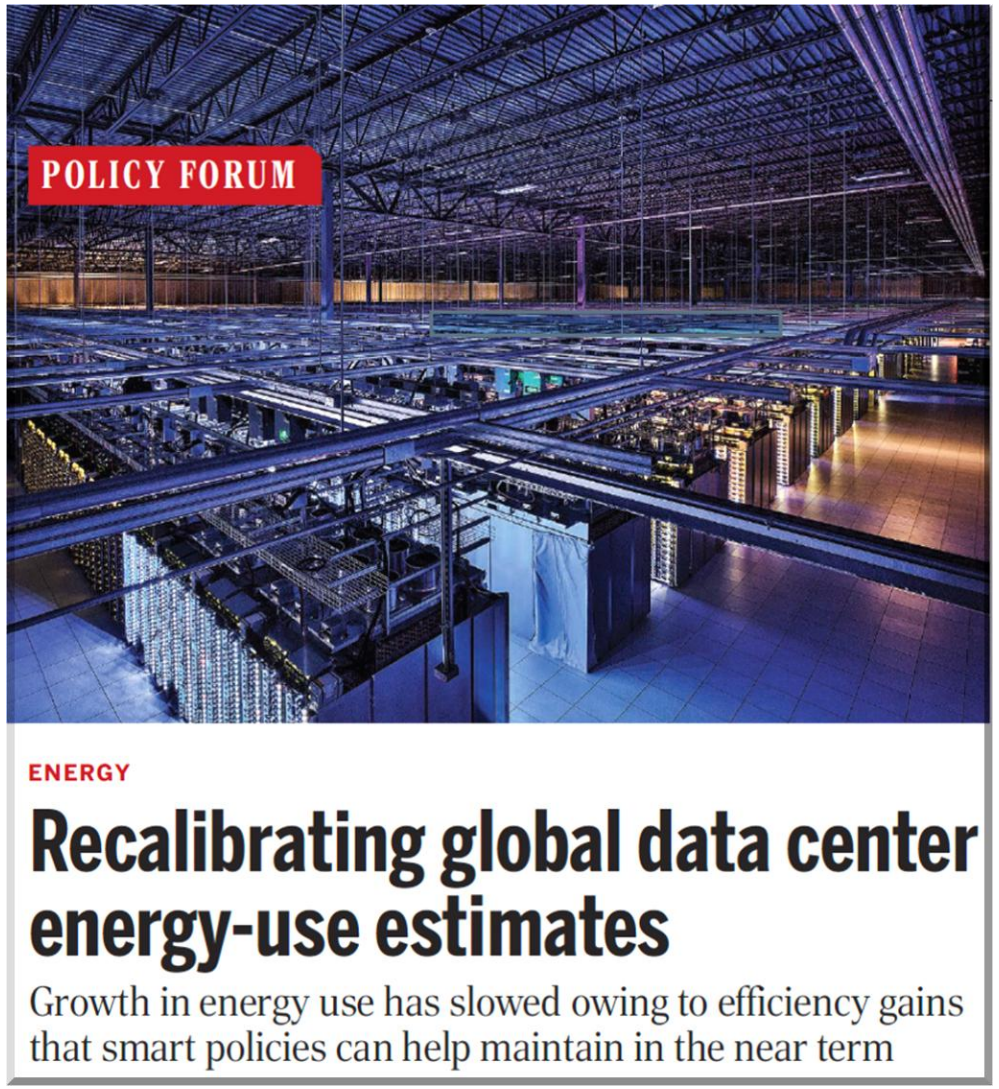
Data Centers Are Highly Efficient Consumers of Energy



- "In 2010, the researchers estimated that **79 percent of data center computing was done in smaller traditional computer centers**, largely owned and run by non-tech companies."
- "By 2018, **89 percent of data center computing took place in larger, utility-style cloud data centers**."
- A 2020 study of data centers globally found that while their **computing output jumped 550% from 2010 to 2018**, their **energy consumption rose only 6%**.

Source: Science, Recalibrating global data center energy-use estimates, Feb 28, 2020. https://www.science.org/doi/10.1126/science.aba3758 and https://datacenters.lbl.gov/sites/default/files/Masanet_et_al_Science_2020.full_.pdf

Data Centers and Energy

CRAIN'S CHICAGO BUSINESS

Opinion: Data center growth fuels clean power and job creation. too

Clarion Ledger

Mississippi's proving data centers don't always mean higher power bills

The Washington Post

There's a reason electricity prices have been rising. And it's not data centers.

The Economist

Americans' electricity bills are up. Don't blame AI

Were it not for data centres, prices might be even higher

PBS NEWS HOUR

How data center power demand could help lower electricity prices

The Atlanta Journal-Constitution

BUSINESS

Georgia Power CEO teases plans to lower rates, touts data center expansion

21 ALIVE

I&M to lower electric rates, citing revenue from data centers

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Why Data Centers?

- Tremendous Capital Investment
- Big Driver of Tax Revenue
- High Wage Jobs, Low Demand on Services
- Substantial Construction Jobs and Activity
- Building and Strengthening Tech Ecosystem
- Catalyst for Clean Energy Development

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Questions?