



Why Speed-to-Power Is now the #1  
Constraint for AI & Industrial Growth

## POWER DELIVERED - WHEN THE GRID CAN'T

Across the U.S., AI data centers and large industrial projects are discovering a new reality: **The grid is no longer the gating factor. The timeline is.**

Hyperscalers are reporting that new transmission and interconnection can take many years in some regions. At the same time, utilities and regulators are under pressure to ensure that large new loads pay their full share of infrastructure costs.



### The Magnolia Power Solution: Power Without Waiting for the Grid

Magnolia Power develops “Energy Centers” — purpose-built, high-capacity power campuses designed to deliver:

- Firm, reliable power at scale
- Faster COD timelines than utility interconnection paths
- Predictable long-term energy pricing
- A clear path to decarbonization, if required

**Instead of waiting years for transmission and substation upgrades, your project gets power where and when you need it.**

### The New Power Reality

What’s happening in the market:

- Interconnection queues are measured in years, not months
- Transmission buildouts are slow, expensive and politically complex
- Large loads are increasingly being required to fund grid upgrades directly
- Power availability and schedule certainty now matter more than marginal \$/MWh

Even the largest technology companies are now:

- Paying higher rates to secure capacity
- Exploring ability to co-locate next to generation
- Signing long-term PPAs that can’t deliver power until 2028+

### Magnolia Power's Value Proposition is Ideal for:

- AI data centers & high-performance capacity campuses
- Direct lithium extraction & advanced materials processing
- Large industrial loads
- Compute, manufacturing, or infrastructure projects with tight schedules and high reliability needs

## Why Leading Customers Are Choosing This Model

Because they are optimizing for:

- Time to power
- Certainty of delivery
- Control of outcomes

In today's market, those attributes are often more valuable than the projected grid savings.



## The Bottom Line

- If your project schedule depends on the grid, your project schedule is at risk.
- Magnolia Power offers a faster, more certain path to large-scale power.

Let's Talk

If you need 10 MW, 50 MW, or more — and you need it on a defined timeline

Let's discuss how a Magnolia Energy Center can support your project

Contact

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## Commercial Structure

Magnolia can typically offer:

- Long-term Energy-as-a-Service / PPA-style agreements (10+ years)
- Transparent pricing:
  - Fuel component passed through
  - Fixed component indexed to inflation
- High availability, firm capacity
- Optional integration of other distributed energy resources, such as battery storage

## Two Paths...

### Two Very Different Outcomes

#### Path 1: Traditional Grid Supply

- Multi-year interconnection risk
- Uncertain upgrade costs and cost-allocation rules
- Political and regulatory exposure
- Schedule risk impacts your core business plan

#### Path 2: Magnolia Energy Center

- Dedicated, on-site / near-site generation
- Contracted capacity with schedule certainty
- Clear commercial terms
- Independent of transmission bottlenecks
- Expandable as your load grows

## Partners & Service Providers



Morgan Stanley  
Energy Partners

