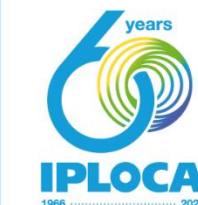




IPLOCA 58th Annual Convention 2026

Athens

28 September-2 October



Solutions with Integrity

Abhay Chand

CEO

Petro IT

AI Data Centres

The Emerging Anchor Customers
Reshaping Natural Gas & Hydrogen
Pipeline Infrastructure

*Where the data-centre power crunch is turning into
pipeline that gets built — and bid.*

Abhay Chand · Chief Executive Officer, Petro IT

IPLOCA 58th Annual Convention · Athens · 28 Sep – 2 Oct 2026



Single-year AI spend has roughly tripled since April 2024



Big-5 hyperscaler capital expenditure (Amazon, Alphabet, Meta, Microsoft, Oracle), full year

The forecast moved too: McKinsey's build-out estimate went from “more than \$1 trillion” (Oct 2024) to \$6.7 trillion by 2030.

April 2024's “bold” forecast has already been overtaken

APRIL 2024 · THE BOLD CALL

+160%

Goldman's forecast for data-centre power growth by 2030 — considered aggressive at the time.

1–2% → 3–4% of global electricity

TODAY · ONE GRID TELLS THE STORY

≈ 4×

ERCOT all-time peak demand — everything Texas has ever delivered

~86 GW

ERCOT data-centre connection requests queued (2026)

~356 GW

One grid's data-centre requests now exceed everything the Texas grid has ever delivered.

And the forecasts keep rising: Goldman now sees +170% by 2030 off a higher 2025 base — the equivalent of adding another Japan to world power — and McKinsey models 156 GW of AI data-centre capacity by 2030.

That capital is chasing power the grid can't deliver

41 → 66 GW

US data-centre power demand, 2026 → 2027

> 50 GW

By 2028, about half of ALL US power-demand growth

44 → 156 GW

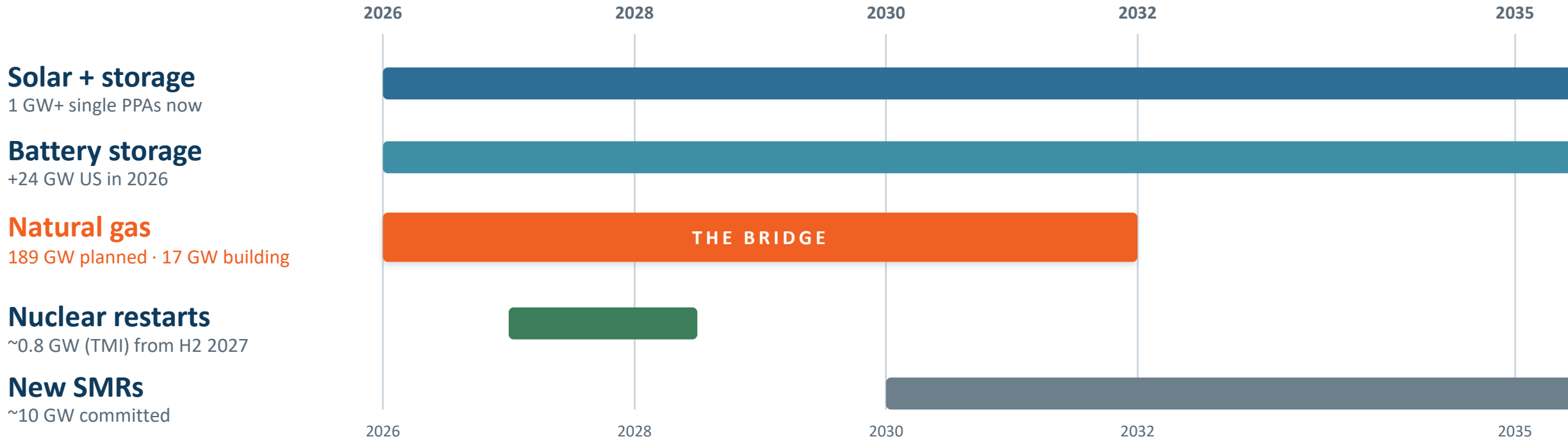
AI compute power demand, 2025 → 2030

Why they're not waiting for the grid

- **Grid interconnection now takes 4–7 years** — median near five, slower than building the campus itself. ERCOT alone holds ~356 GW of requests.
- **The answer is behind-the-meter gas** — the only firm, dispatchable power deliverable in 2–4 years at 100+ MW scale.
- **Policy is reinforcing it** — Pennsylvania now tells data-centre developers to generate their own power or pay the full grid cost.

All-of-the-above — but only gas bridges 2026–2032

How hyperscalers are actually sourcing power — by role and by timeline.



Solar leads on cost. Nuclear owns the 2030s. Batteries firm it. **Only gas is firm, dispatchable, and buildable at 100+ MW on the AI timeline — so gas, and its pipe, bridges the gap.**

From data-centre dollars to pipeline dollars

Each dollar of data-centre capex pulls energy spend, then gas, then pipe.

1

Data-centre capex

\$2.9T

global, 2025–2028

2

Power & electrical

~\$1.3T

of the \$6.7T build to 2030 —
McKinsey's "energizers" (25% of the
total)

3

Gas takes the firm load

\$330B

US gas investment 2026 (decade high).
189 GW of gas plants planned for US
data centres; ~17 GW already building

4

Pipeline & midstream

44.9 Bcf/d

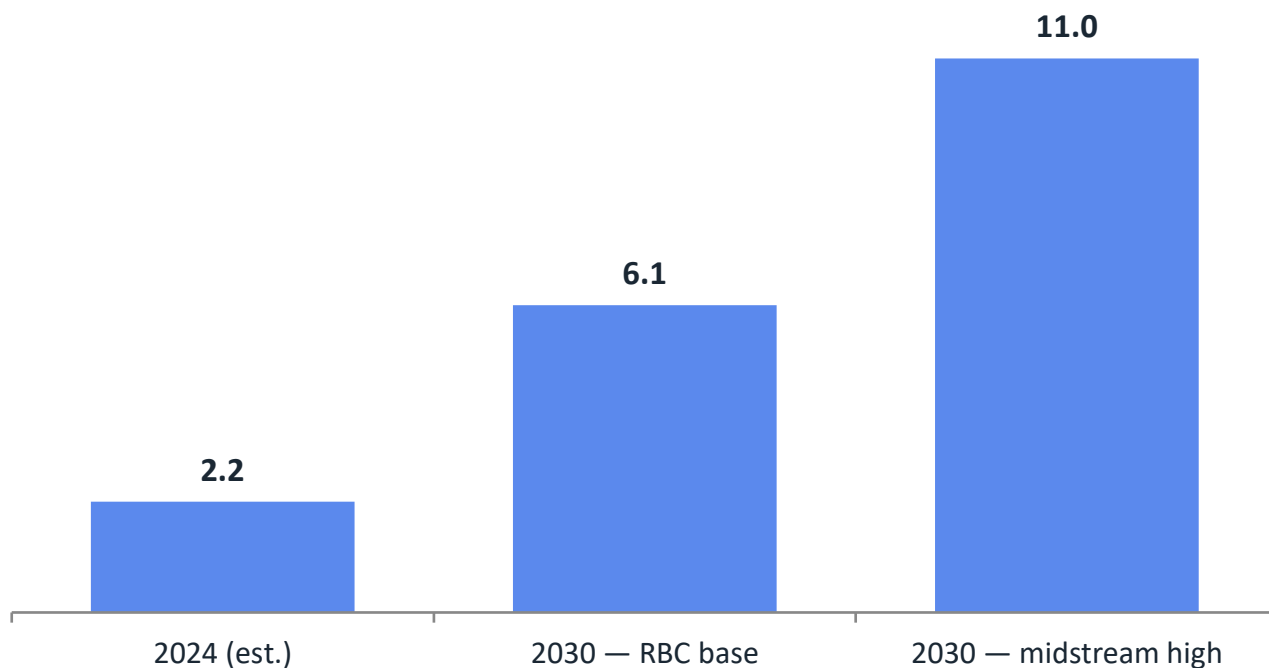
new US capacity 2026–27; ~6.1 Bcf/d
of demand is data-centre-driven

Petro IT estimate — the construction-addressable slice

On a realistic build-out — **~30% of the 189 GW announced actually gets built** — that is roughly **\$75–120B of gas-plant construction** plus **\$20–40B of directly-attributable pipeline, laterals and interconnects** through 2030. *(189 GW announced · ~17 GW already building · ~\$1,000–2,000/kW; excludes broader midstream.)*

Data centres are a structural new gas load

US data-centre natural-gas demand — path to 2030 (Bcf/d)



~44.9 Bcf/d

new US pipeline capacity planned for 2026–2027 —
~70% already under construction

66%+

of that new capacity originates in Texas

~64 GW

of gas generation now queued to come online by 2030

You've read the energy story...

Here's the part that lands in your order book.

1

Laterals off the mainline

Midstream operators are actively siting lateral projects to serve behind-the-meter campuses directly.

2

Mainline expansions & new-build

Open seasons and FIDs for 0.4–2.5 Bcf/d systems explicitly tied to data-centre and power load.

3

Interconnects & metering

High-pressure connections and dedicated metering, built to critical-infrastructure reliability.

An energy story for developers — a construction pipeline for you.

Named projects under construction — North America

Project	Pipeline dimension	Players	Status · src
Homer City PA	~4.4–4.5 GW plant; ~665,000 MMBtu/day via multiple pipelines from 2027; fed off Texas Eastern	Kiewit (EPC); GE Vernova	Under construction — largest US gas plant [4,11,17]
“Socrates” Ohio	Two gas plants + a ~20-mile dedicated pipeline to a Meta campus	Williams	Pipeline online late 2026 [10]
CloudBurst Texas	Laterals sited off the mainline to a 1.2 GW behind-the-meter campus	Energy Transfer	Contracted; laterals in build [9]
Fort Cherry PA	Modular 25 MW gas “power blocks,” scalable to ~1 GW+; Marcellus gas	Liberty Energy; Range Res.	Announced; phased [11]
Permian takeaway	Blackcomb 2.5 Bcf/d; Hugh Brinson 2.2 Bcf/d; Port Arthur LA 2.0 Bcf/d	Various midstream	In service 2026–27 [1]

Homer City: a coal site **reborn** as gas-for-AI

~4.4–4.5 GW

gas-fired capacity — would be the largest in the US

665,000

MMBtu/day, delivered via multiple pipeline systems from 2027

7

hydrogen-ready GE Vernova turbines

Why it matters to this room:

Kiewit is the constructor — The scope isn't just a power plant: it's high-pressure pipeline, an interconnect (state-grant-supported), and dedicated metering, all on a compressed, reliability-graded schedule. This is the template for the class of work in the next two slides.

Coming or biddable now — the forward pipeline

“Open season” and “under review” = scope you can position against before EPC award.

Project	Scope / capacity	Players	Timing signal · src
Pembina “Greenlight”	932 MW, ~150 MMcf/d; fed by proposed Alliance Heartland Expansion pipeline; option to 1,864 MW	Pembina; MSIP; Kinetikor	FID reached; pipeline filing ~Aug 2026 [6]
TC Energy – Crossroads	~1.5 Bcf/d new-build for Midwest data-centre & power demand	TC Energy	Open season live — biddable [14]
Tallgrass Permian→REX	New long-haul reaching data-centre hubs	Tallgrass	Open season underway [8]
TC Energy – C. Virginia & Clark	+0.4 & +0.3 Bcf/d (~\$300M / ~\$100M) tied to gas-fired power	TC Energy	Sanctioned; ISD 2028–30 [7]
Energy Transfer – NM	17.7-mile lateral to a data-centre microgrid	Energy Transfer	Under federal review [12]
SB Energy / AEP – Ohio	≥9.2 GW gas of a 10 GW plan; + ~\$4.2B new transmission	SoftBank; AEP (DOE)	Announced Mar 2026 [5]

Grid-lock forces on-site gas — hydrogen-ready by rule

Frankfurt, Germany



Europe's largest hub hitting a hard power wall; grid lead times measured in years.

Emblematic case: a 61 MW on-site gas plant, switchable to up to 25% hydrogen, at a Frankfurt campus — hydrogen-ready by the EnEfG regime, not by choice.

NTT's 480 MW Nierstein project is breaking ground nearby.

Ireland (Dublin)



~€5.8B of fully-permitted data centres can't operate — no grid connection available.

The CRU framework makes on-site generation the only viable path. Operators (Echelon, EdgeConneX) are each deploying 100–120 MW of gas, fuelled by Gas Networks Ireland's “Gas to Grange.”

If Germany's and France's pipelines are fully built, data centres reach ~5–10% of today's peak electricity demand.

A structurally new class of project

Shorter, higher value

Compact connections and laterals, not 1,000-km corridors — but premium, time-critical scope.

Compressed schedules

Time-to-power is the whole point; the programme is measured against the campus, not the pipeline.

Reliability-graded

Built to critical-infrastructure standards — the campus can't lose power.

Complex permitting

Behind-the-meter siting, federal review, interconnect and metering dependencies stacked together.

Hydrogen-spec

Increasingly hydrogen-ready by regulation and offtake — material and design implications from day one.

Digitally demanding

Real-time visibility of resources, schedule, logistics and asset data across a fast, high-stakes build.

The AI data-centre build-out is a pipeline build-out

How \$2.9 trillion of AI infrastructure cascades into contractor scope — and where the work already is.

FROM AI CAPITAL → CONSTRUCTION SCOPE

\$2.9T Data-centre capex, 2025–28

~\$1.3T Power & electrical spend

189 GW Gas plants planned, US data centres

44.9 Bcf/d New US pipeline capacity, 2026–27

\$75–120B Gas-plant construction (est.)

Of 189 GW announced, ~17 GW already under construction — and historically ~30% of proposals get built.

WHY IT'S HAPPENING:

- **Grid interconnection** now takes 4–7 years; slower than the campus itself.
- **Behind-the-meter gas** is the only firm power in time.
- **US data-centre power** 41→66 GW; >50 GW by 2028 ≈ half of all US demand growth.

BEING BUILT & BIDDABLE ACROSS NA + EUROPE

- | | |
|--|--------------------|
| ● Homer City, PA — 4.4 GW, multi-pipeline (Kiewit) | BUILDING |
| ● GW Ranch, TX — up to 7.7 GW — largest US gas project | PERMITTED |
| ● Pembina Greenlight, AB — 932 MW + Alliance pipeline | FID |
| ● TC Energy · Tallgrass — Midwest new-build / Permian long-haul | OPEN SEASON |
| ● Frankfurt · Dublin — On-site gas, hydrogen-ready by rule | EUROPE |

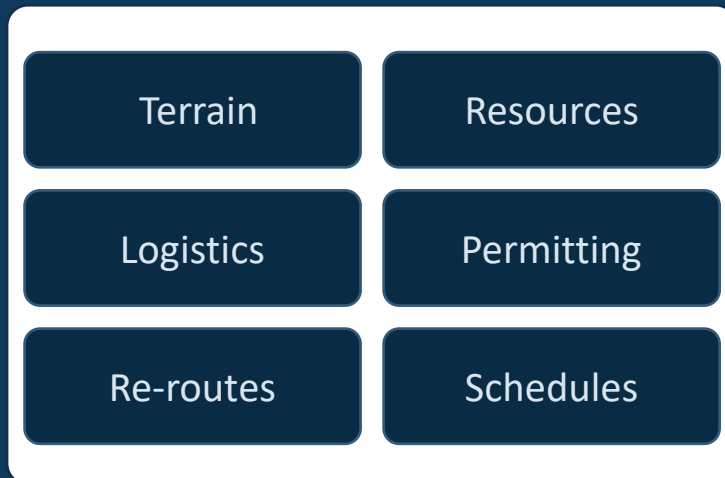
The payoff for contractors: short, fast, reliability-graded, hydrogen-spec work — won and delivered on **digital execution**.

Petro IT

Make it repeatable — as the variables keep moving

Execute a project efficiently and profitably, and you want that to become repeatable, scalable and reliable. But the variables change constantly — so how do you get there?

THE VARIABLES NEVER STOP MOVING



AI-enabled digital execution

Turns your live execution data into the next decision — automatically, as conditions change.

CONSISTENT DIGITAL & DATA DELIVERY

● **REPEATABLE** *the same playbook, every project*

● **SCALABLE** *10 projects run like 1*

● **RELIABLE** *the outcome holds as inputs move*

Run it well once — Mozaic makes it **repeatable, scalable and reliable**, project after project, through data based predictions and decisions, however the variables move.

Petro IT



A platform designed to guide you through every stage
of the infrastructure lifecycle



Stack 61

Supply Chain
& Inventory
Management



Glide

Plant & Facilities
Construction
Management



Pipetrak

Pipeline &
Linear Asset
Construction
Management



Streamline

Commissioning
Completions
& Workflows



Verifyd

Regulatory
Compliance
Management



With
Studio

An **AI-powered** application builder to adapt our existing solutions or craft
new ones tailored to your infrastructure needs.



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