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Powering the AI and digital surge: How can data centres within Australia navigate energy system capacity and other constraints?

Data Centre energy transition and transformation

The better the question.
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The better the world works.

Powering the AI and digital surge: How can Data Centres within Australia, navigate energy system capacity and other constraints?

Data Centres (DCs) are continuing to shift rapidly from being traditional IT facilities to becoming foundational economic infrastructure that underpins Australia's digital and AI enabled economy. The increased demand for DCs, driven by rapid adoption of AI globally, is also impacting Australia. Australia's National AI Plan, published in December 2025, highlights building smart DC infrastructure as a key action to deliver AI capability. Investment spending in 2024 exceeded $10 billion with projected investment spending to scale up to over $100 billion.

Australia is well positioned to enable hyperscale cloud expansion and growing data sovereignty requirements, but only if energy, planning, grid infrastructure and regulatory frameworks are modernised to support gigawatt scale, always on hyperscale loads and DC's native energy systems. This increased demand is also reshaping energy consumption patterns and putting pressure on our already stressed energy systems that were not designed for decentralised, continuous large scale industrial loads. The DC demand for energy in our region is projected to surge from 4 TWh in 2025 to 21.4 TWh in 2035. The planners, regulators, network operators and investors face interconnected challenges that will determine whether this expansion supports or undermines net zero transition objectives, grid reliability and affordable energy access for all consumers.

The digital landscape is undergoing a radical transformation within the energy ecosystem impacting all participants as they navigate challenges to success fully establish and operate DCs. Through a sequence of deep dives into the industry's most pressing issues, energy and technology professionals at EY Australia are publishing a series of articles that begins by addressing the fundamental hurdle of energy demand and supply, followed by an analysis of optimising technology and hardware for maximum efficiency. Subsequent articles explore the path towards aligning infrastructure with sustainability goals and maintaining pricing stability amidst energy market volatility. Further exploration will include AI driven growth in the near term and provide a strategic forecast of the future market to inform long term planning. This article is part 1 of the series; it explores four critical factors shaping data centre driven energy demand.

By examining the current landscape, the discussion addresses how the energy ecosystem must plan for both short term requirements and long term goals, balancing the spike in demand with the broader energy transition. The analysis focuses on the fundamental constraints impacting the market, specifically: locational dependence of energy access, equity in local energy allocation, grid infrastructure limitations as binding constraints and the challenges of limited system flexibility without sufficient storage. These four critical factors offer a strategic lens for navigating supply security and infrastructure planning in an increasingly complex environment. EY Australia clients are increasingly focused on the relationship between DC and AI growth and the energy transition, questioning whether this expansion will support or hinder the deployment of renewable energy as the grid decarbonises. Additionally, concerns about water and resource constraints, along with the implications of environmental development approvals, are paramount as organisations strive for sustainable growth. Further exploration of these issues and others will be featured in articles from our series.

This article is shaped by energy market modelling professionals and technology professionals at EY Australia including insights from key stakeholders across the DC value chain such as system planners, energy market regulators, DC operators and consumers/users, network providers and government policy makers amongst others.

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1. Understanding the situation

Post COVID-19, economic recovery and increased usage of digital services reignited demand for electricity to pre pandemic levels to support consumer, commercial and industrial loads.

The rapid rise in AI energy demand is being driven primarily by the training and large-scale inference of large language models (LLMs) that underpin generative AI from organisations such as OpenAI, Google, Microsoft amongst others.

The Australian Energy Market Operator (AEMO) forecasts that under the accelerated transition, energy consumption from DCs is projected to be around 13 TWh by 2029-30, 9% greater than the Step Change case. Under slower growth, the forecast by 2029-30 is projected to be around 8 TWh, 30% smaller than Step Change.

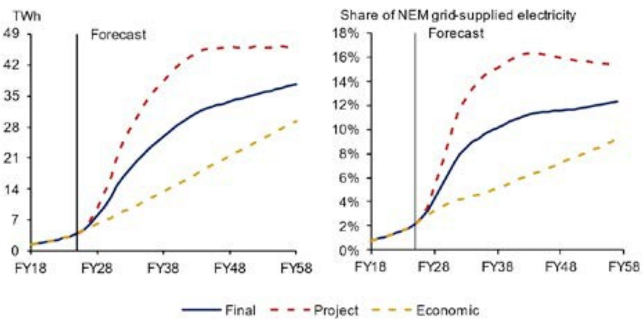


Figure 1 Australian Data Centre Consumption

Note: Final, Project and Economic refer to AEMO demand outlook scenarios defined in the 2025 IASR, reflecting differing assumptions on economic growth, technology uptake and electrification pathways.
Source: AEMO, 2025

Figure 1 highlights the projected data centre energy consumption across Australia's east coast under alternative AEMO demand scenarios.

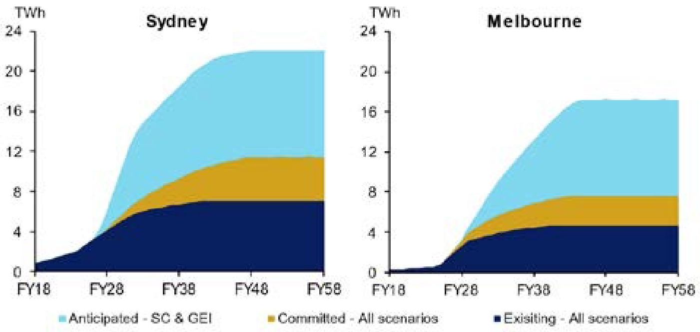


Figure 2: Projected DC Energy Demand Profiles - Near and Long Term

Note: SC refers to step change, while GEI represents grid-enabled infrastructure. 'Existing' reflects currently operational facilities, while 'Committed' includes projects with financial close or advanced planning approval.
Source: AEMO, 2025

DC energy demand profiles across both the near and long term, extending to 2058. The future includes details such as energy demands in AI, increased transition to support hyperscalers, near real time data analysis, visualisations and live streaming, amongst other always on technology.

To quantify the scale of this emerging demand, the 2025 AEMO Inputs, Assumptions and Scenarios Report (IASR) includes explicit electricity consumption forecasts for DCs under the Step Change scenario. Aggregated across all NEM regions, as summarised in Table 1, data centre consumption rises from approximately 4.7 TWh in 2025-26 to 11.8 TWh by 2029-30 and 33.8 TWh by 2049-50. Using the standard conversion of 1 TWh ≈ 114 MW of continuous load, this equates to an average electrical demand of roughly 0.5 GW (2025-26), 1.35 GW (2030) and 3.9 GW (2050). Assuming a typical power usage effectiveness (PUE) of 1.3 and an average utilisation (load factor) of 70 percent, these values correspond to installed IT capacities of approximately 0.55 GW (2025-26), 1.48 GW (2030) and 4.29 GW (2050) (for indicative translation of electricity demand into physical data centre); however electricity load remains the binding constraint for energy system planning.

Table 1 data centre electricity demand and implied capacity
Source: AEMO 2025

Year (FY)	Interpretation	Data-Centre demand (TWh/yr)	Implied average electrical load (GW)	Implied Installed IT capacity (GW)*
2025 -26	Current forecast year	4.70	0.54	0.59
2029 -30	2030 proxy	11.79	1.35	1.48
2049 -50	2050 proxy	33.84	3.86	4.25

*Author's calculations from AEMO Step Change dataset (1TWh~ 114 MW average load; PUE=1.3; load factor =70%).

Complementary evidence from Oxford Economics, commissioned by AEMO to inform the IASR, reinforces both the magnitude and the composition of this growth. The study estimates that existing operational facilities consumed 3.9 TWh in FY25—around 2 percent of total NEM electricity demand—and are expected to reach 8.5 TWh by FY30, achieving mature load around FY41[2]. While these forecasts differ in magnitude from the AEMO Step Change estimates shown in Table 1, both sources indicate a material acceleration in data-centre-driven electricity demand.

The Oxford Economics study cites 8 GW of prospective IT capacity, which translates into electricity consumption of approximately 8.1 TWh by FY30 depending on utilisation and power-usage effectiveness. These figures imply that roughly half of national data centre energy use in 2030 and nearly all incremental growth through 2050 derive from new projects still in the development pipeline rather than from today's operational fleet (Oxford Economics for AEMO 2025)[3].

Independent market assessments provide further insight into the scale of the development pipeline; however, reported figures vary depending on whether they refer to installed IT capacity or implied electricity load. To avoid confusion, this article focuses primarily on electricity demand (TWh and MW), which represents power capacity as the binding constraint for energy-system planning. The Arizton (2025) Australia Data Centre Market Report identifies 145 existing facilities providing 1,663 MW of IT load and 43 upcoming centres expected to add over 5,455 MW by 2028—almost a three-fold increase in national IT capacity[5]. As of 2025, the industry directory DataCenterMap.com lists 275 data centre sites

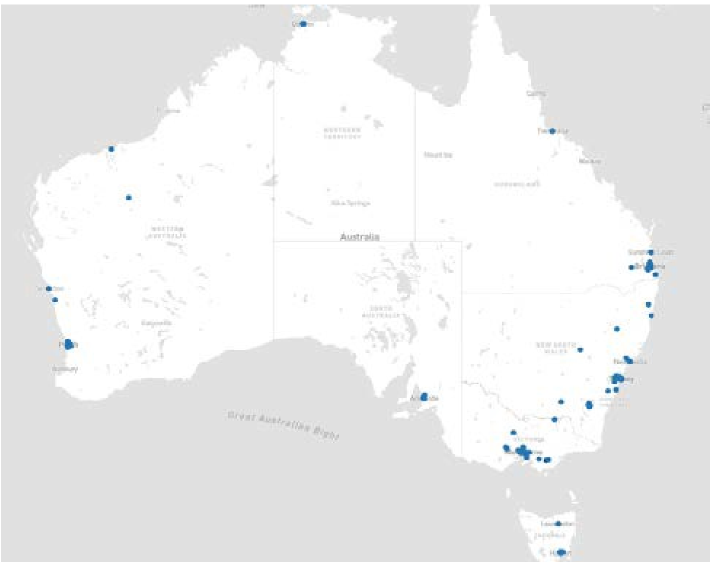


Figure 3 Geographic distribution of operational data centres in Australia (2025)[6]
Source: DataCentreMap, 2025

across Australia, encompassing hyperscale, enterprise and co-location facilities, confirming that development activity extends well beyond the metropolitan clusters captured in commercial real-estate datasets[4]. The spatial distribution of these facilities is illustrated in Figure 3, which shows dense clusters around Sydney, Melbourne, Perth and Brisbane and smaller nodes in regional centres.

Taken together, these sources paint a consistent picture of a rapidly industrialising digital infrastructure sector. The operational fleet—roughly 1.7 GW of IT capacity spread across approximately 275 sites—already constitutes a significant continuous load on Australia's electricity grids, while the committed and proposed pipeline adds several gigawatts of additional capacity over the next decade, subject to development sequencing and grid-connection outcomes. Under AEMO's Step Change trajectory, this expansion will lift national data centre electricity demand from less than 5 TWh today to more than 30 TWh by mid century.

EY Australia professionals acknowledge that there will be implications for planners and policymakers in meeting Australia's decarbonisation ambitions. At the same time, reliability and equity objectives will require proactive integration of datacentre developments into generation, transmission, water-resource and land-use planning frameworks, ensuring that the digital-economy growth does not inadvertently displace affordable, reliable supply for existing consumers.

2. Core challenges in projected expansion

Our analysis of emerging DC energy demand is built on four core assumptions that reflect the operational realities of the national energy market (NEM) and the characteristics of continuous, high-density digital loads:

2.1 Locational dependence of energy access

Connection feasibility for new DCs depends heavily on location—particularly proximity to high-capacity transmission nodes, renewable energy zones and major generation hubs. Site choice affects marginal loss factors (MLFs), network augmentation needs and long-term supply costs.

The location of DCs, in close proximity to sustainable and non-sustainable energy generation providers is a major factor in accessible energy. DCs require significant power, with some Australian projects in planning stages proposing gigawatt scale capacities[7]. According to Secure I.T. Environments Ltd, power related events, including both grid supply interruptions and on-site power system failures, are responsible for 22% of data centre downtime, which can lead to data loss, data corruption, productivity loss and lost revenue. Thus, DCs are incentivised to locate near strong network infrastructure to ensure reliable supply and placement near high-capacity transmission nodes and generation hubs can reduce strain on the grid and support cost efficiency.

Beyond reliability, DCs are catalysts for renewable investment and grid modernisation. DC operators increasingly leverage bespoke energy options, including onsite generation through solar panels, onsite batteries, or partnerships with energy providers. DC operators may also co-locate with generation sources or adopt tolling agreements with power infrastructure owners to enhance their access to energy of all kinds.

Sydney is currently Australia's largest DC hub; however, Oxford Economics[12] forecasts that Melbourne will absorb a significant proportion of future growth, increasing from its current 20% share to 41% by FY40. CBRE Research[13] argues grid connection delays are a factor in why DC operators are exploring Melbourne and other Australian cities as alternative location to the Sydney metro area.

This underscores how site selection directly impacts connection feasibility - proximity to high-capacity transmission nodes, renewable energy zones and major generation hubs determines access to sufficient power, as well as marginal loss factors, network augmentation requirements and long-term supply costs.

As demand from DCs continues to rise rapidly and sustainability targets tighten, the impact of their site choices shapes energy accessibility for the entire region. These DC location decisions can drive investment in new transmission infrastructure and renewable projects, with the potential for positive spillover benefits for communities—supporting new transmission investment, improving utilisation of renewable generation and lowering long term network costs for existing consumers through shared infrastructure. However, if poorly coordinated, these developments can increase local grid congestion and shift costs onto households and small businesses. This is precisely where EY Australia provides value: helping data centre operators, network businesses and policymakers structure commercially viable, equitable and grid positive options through strategy consulting, energy market modelling and infrastructure advisory. Products and Services relating to market dynamics, buying preferences and transformation outcomes are provided by EY Australia.

2.2 Equity in local energy allocation

Large, always-on data centre loads can materially shift local consumption patterns. We assume that planning frameworks must preserve fair access to affordable, reliable electricity for households and small businesses, especially in areas with binding network constraints. These planning frameworks must remain a priority as AI DCs rapidly expand. Key challenges faced by energy market operators, network planners and distributors include demand predictability and the strength of commercial commitments from data-centre operators. Long lead times for network and generation investment require a high degree of certainty that forecast demand will materialise.

3. Key challenges for energy capacity planning

Energy capacity planners and distributors encounter several core challenges when supporting projected DC expansion. A primary concern is the need for predictable demand and clear commitment from DC operators and their customers. Without reliable forecasts, it becomes difficult to plan for the substantial and continuous power requirements associated with new facilities. Furthermore, the process of provisioning and expanding grid capacity involves significant lead times. Infrastructure upgrades and augmentations require careful scheduling and substantial investment, often spanning multiple years.

For energy providers, these long-term commitments must be commercially viable, meaning there needs to be assurance that the costs associated with expanding capacity will be offset by ongoing demand from DC clients.

In summary, the key challenges for energy capacity planners and distributors include securing demand certainty from DC operators and ensuring that the extended timelines and capital investments required for grid expansion are justified by sustainable, long term commercial arrangements.

In global markets, where DCs cluster together, neighbouring communities have experienced increased electricity costs.

A Bloomberg analysis of international markets with concentrated DCs found that wholesale electricity prices have risen as much as 267%, highlighting how concentrated digital infrastructure without robust capacity planning can significantly increase the energy costs[14].

In Australia, network charges already account for 39% of household electricity bills in the NEM[15]. While data-centre growth is likely to increase total net-work investment requirements, the impact on unit network charges depends on cost-allocation frame-works. Where incremental network costs are appropriately borne by large, high-load users, additional demand can help spread existing fixed costs across a larger consumption base, mitigating upward pressure on household tariffs. This underscores the importance of carefully designing cost-allocation frameworks to help fair and equitable treatment for both existing energy consumers and a new class of high energy DC-type consumers.

The potential for a significant quantity of homo-geneous DC facility load will create new demand for which the grid was never designed to manage. For example, in 2024, an emergency measure narrowly prevented a system-wide collapse in Virginia after 60 DCs disconnected simultaneously, releasing a surge of excess energy[16]. Such events raise the issue of whether prioritisation frameworks will favour communities or DCs during supply constraints or grid security events. Resource competition extends beyond electricity. Sydney Water projections indicate that by 2035 DCs could consume up to 25% of Sydney's potable water[17] raising questions of equitable allocation in a city that has already experienced difficulties in meeting demand. In 2019, 5.3 million residences in Sydney were banned from watering gardens or washing cars as drought and bushfires erupted throughout the country[18].

Proposed projects can intersect with environmentally and culturally sensitive areas, making community engagement critical. Securing a social license depends on early consultation and transparent benefit-sharing with diverse stakeholders to avoid land-use conflicts[19]. Alongside these social considerations, regulatory measures such as the newly imposed mandatory five- star NABERS ratings embed sustainability standards, emissions thresholds and energy reporting into site planning[20]. Together, these social and environmental requirements highlight that responsible expansion must balance cultural respect with rigorous sustainability standards.

Equity in local energy allocation is an urgent concern as Australia moves towards large-scale AI DC development. Rising network costs, suboptimal energy allocation and resource competition underscore the need for robust planning frameworks that prioritise community access to affordable and reliable energy. Balancing these demands whilst upholding cultural and environmental considerations requires clear strategies to strengthen social license and maintain community trust.

3.1 Grid-infrastructure limitations as binding constraints

Ageing, congested, or capacity-limited transmission and distribution assets can restrict the ability to supply new high-density loads. These constraints influence connection delays, reliability outcomes and augmentation requirements, both in the near term and long term.

3.2 Current Constraints

The distribution network, specifically the lower-voltage distribution substations, is currently constrained due to reaching thermal capacity (AEMO, 2025). In contrast the high voltage transmission network faces a different issue, despite planned increases in renewable energy production and new sites, transmission lines are causing significant curtailment because they cannot accommodate additional capacity without exceeding safe operating limits. This issue is further exacerbated during the day when rooftop solar output is the highest; however, this coincides with lower demand periods when many Australians are at work, resulting in energy being generated but not consumed.

If this oversupply is significant, this energy can flow into the transmission network; however, if the network is already at capacity, this leads to critical energy loss (AER, 2025). Therefore, billions of dollars in funding are needed to upgrade ageing infrastructure, capacity- limited transmission network and roll out of BESS to capture the excess generation. All of these limitations are currently hindering the Australian electricity grid's ability to meet the growing energy demand (AEMO, 2025).

Long term demands According to AEMO, energy demand is expected to nearly double by 2050, rising from approximately 205 TWh in 2025 to 389 TWh (AEMO, 2025). This is a further increase of 76 TWh to the earlier forecasted 313 TWh published in the 2024 Integrated System Plan (AEMO, 2024). To meet these expectations and address ageing grid infrastructure, AEMO's Optimal Development Plan (ODP) estimates that an additional 6,000km of transmission lines will need to be built, at an estimated cost of AUD 128 billion (AEMO, 2025). The ageing and capacity-limited grid infrastructure is not only a current constraint but will become even more critical as grid demand is expected to double in the coming decades. Therefore, despite the significant cost, investing into Australia's grid infrastructure is essential.

3.3 Limited system flexibility without sufficient storage

Insufficient storage (battery, pumped hydro) reduces the ability to absorb surplus renewable generation and support the continuous load profile of DCs. This constrains both near term and long-term scalability.

These assumptions shape the modelling approach described in the next section and underpin our interpretation of the system impacts explored throughout the article.

The collection of these challenges creates opportunities to modernise the generation and storage ecosystem to meet excess load created by the growth of DCs and origination of firmed PPA contracts.

4. Solving the problem

To navigate the complexities of the DC energy nexus, EY-Parthenon in collaboration with Consulting offer a suite of integrated services and digital products designed to transform capacity barriers into scalable growth.

Energy and technology professionals at EY Australia have conducted DC engagements in multiple markets within Australia and across the globe giving us detailed knowledge of recent market dynamics, buying preferences and transformation outcomes. By leveraging our deep experience across the energy ecosystem, sophisticated energy market modelling, DC commercial and site viability assessments, AI growth forecasting model, grid infrastructure advisory and technology advisory is performed by EY Australia professionals. These are a subset of services and they are improved by proprietary tools and digital platforms that enable near real-time tracking of renewable energy, management of complex power purchase agreements (PPAs) and simulation of grid assumptions and constraints. From helping ensure equity in local energy allocation to implementing advanced storage options, innovation professionals at EY Australia are available to support market transformation for industry participants. A sample of our product offerings in the market include the Energy market model (EMM) and Corporate Power Purchasing Agreement (CPPA) platforms.

4.1 Energy Market Modelling (EY ROAM)

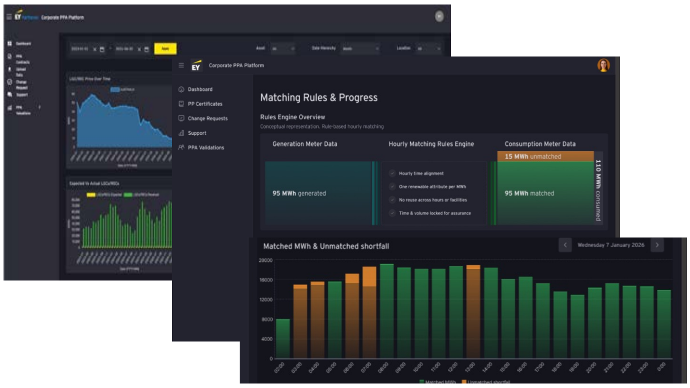
A product and energy consulting for all energy market-related scenarios, supporting the planning of asset performance, visualisation of network congestion points and assessment of risk to marginal loss factors well into the future, to help assess suitable locations and the energy mix for DC lifecycle management.

Source: EY, 2026

4.2 Offtake Advisory and Corporate PPA Product

A product for end-to-end Power Purchasing Agreement (PPA) lifecycle management from evaluation to ongoing performance management of the renewable energy sourcing contract to size appropriate DC load. Hourly matching of energy generation & energy consumption for carbon offsetting schemes.

Furthermore, the origination and selection of new Data Centre Power Purchase Agreements (PPAs) are also available from Australia, providing Commercial advisory services, market analysis and regulatory compliance Assistance.



5: EY's CPAA Product
Source: EY, 2026

Additionally, they offer transaction support and sustainability consulting to help organisations align their energy procurement strategies with.

4.3 Commercial Advisory

On renewable sourcing, infrastructure investment and stakeholder alignment.

4.4 Regulatory Advisory

On policy frameworks and planning integration.

4.5 Land Viability and Valuations

That integrates grid capacity, renewable access, cost allocation, valuations.

Within the data centre sector, holistic improvements can be created that include capabilities in digital infrastructure, real estate, tax and other areas to optimise operational efficiency and accelerate expansion within the Australia market.

Key takeaways

Surge in data centre demand:
Driven by AI adoption, cloud expansion and data sovereignty, energy demand is projected to rise from 04 TWh in 2025 to 21; 04 TWh by 2035.

Energy system strain:
Increased demand reshapes consumption patterns, stressing existing energy systems.

Energy participant challenges:
Planners and regulators face interconnected issues related to net-zero objectives, grid reliability and affordable energy access.

Navigating data centre challenges:
A series of articles aims to guide the energy ecosystem through pressing issues like energy supply, technology optimisation and sustainability alignment.

Critical factors:
Key considerations include locational energy access, equity in energy allocation, grid infrastructure limitations and system flexibility challenges.

Strategic planning:
Focus on balancing immediate energy demands with long term sustainability goals and infrastructure planning in a complex environment

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