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OMA Says 'Enough' on Data Center Forecasts Nobody Can Prove

Koomey challenges projections at Ohio Manufacturers' Energy Conference as regulators face scrutiny over who pays when forecasts miss

COLUMBUS, Ohio — Ohio is being told to prepare for an unprecedented surge in electricity demand from data centers and artificial intelligence.

But the forecasts driving that rush are far less certain than regulators and grid operators are treating them.

Speaking today at the Ohio Manufacturers' Energy Conference, Renowned researcher Dr. Jonathan Koomey challenged assumptions behind projections of explosive data-center electricity demand and warned against building long-term energy policy around short-term trends.

Koomey said data-center electricity use is growing, but future AI-related demand remains deeply uncertain. His presentation showed that forecasts can rely on assumptions that are difficult to verify, raising questions about whether regulators are scrutinizing those projections closely enough before they drive major investment decisions.

“When you see a forecast, you think, well, that’s going to happen. But it turns out forecasts are not reality," Koomey said. "Any business person worth their salt knows that for sure.”

Koomey also offered a warning from history. Technology-driven electricity forecasts have been wrong before, sometimes spectacularly so. PCs were once projected to consume as much as half of U.S. electricity. The internet was blamed for the California power crisis. One analysis claimed a wireless PalmPilot used as much electricity as a refrigerator, an estimate Koomey said was off by roughly 2,000 times.

The lesson is not that data-center demand is imaginary. It is that technological change, efficiency gains and uncertain adoption can make straight-line projections dangerously unreliable. Koomey said forecasts of massive growth do not necessarily reflect what ultimately will occur.

The real danger comes when uncertain projections start driving real costs for existing customers.

“Enough. Utilities keep putting enormous forecasts on the table, regulators keep treating them like facts and customers keep getting stuck with the risk,” said Ryan Augsburger, president of the Ohio Manufacturers’ Association (OMA). “If utilities and grid operators want to spend billions chasing projected demand, then prove the demand first. Regulators should be protecting customers, not rubber-stamping speculative spending and leaving customers holding the bag when the forecasts fall apart."

Koomey said developers may approach multiple utilities while considering potential sites, creating the possibility that the same prospective load is counted more than once. He also cited Vistra Energy CEO James Burke, who has said interconnection queues may be overstated by three to five times compared with the load that ultimately materializes.

"This is exactly why customers are furious," Augsburger said. "Regulators are supposed to be the check on this process. Instead, too often they are accepting enormous projections and approving enormous costs while customers carry all the downside. That has to stop. If regulators are going to approve billions in spending, they damn well better know the demand is real."

Koomey warned that naive extrapolation of short-term trends is "a recipe for disaster" and called for utilities and regulators to consider a wider range of possible demand scenarios.

The Ohio Manufacturers' Energy Conference brings together manufacturers, policymakers, energy experts, consumer advocates and companies making major investments in Ohio's energy future.

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