

your energy voice

BEHIND-THE-METER GENERATION AND THE GRID

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a new power reality

**Demand growth is back
—at scale.**

>5%

annual load growth

Data centers, AI, manufacturing and electrification are driving a new urgency around speed-to-power and infrastructure expansion.

Speed matters

Customers increasingly need power before major grid upgrades can be completed.

BTM can bridge the gap

On-site generation can support phased development, resilience and near-term capacity.

The end state still matters

Concentric finds durable outcomes come from grid-connected solutions, clear cost responsibility and coordinated planning.



the grid is the reliability platform

Behind-the-meter resources add value—but the shared grid provides capabilities individual systems cannot replicate.

99.95%

AVERAGE RELIABILITY

The grid remains exceptionally reliable across the country.

~80%

OUTAGES FROM WEATHER

Most major outages are driven by severe weather, not structural asset condition.

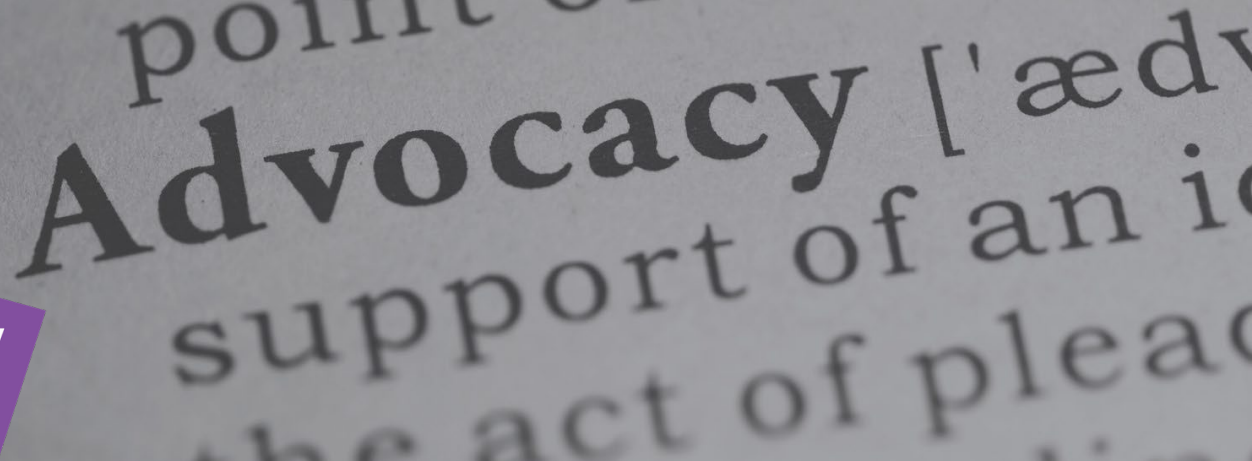
\$1.60–\$1.80

SYSTEM SAVINGS

Estimated savings returned for every \$1 invested in transmission.

THE SHARED GRID DELIVERS:

Redundancy • resource diversity • regional balancing • mutual assistance • faster restoration



behind -the -meter: complement, not substitute

GRID-CONNECTED BTM

- Supports speed-to-power and phased development
- Can improve site resilience and provide dispatchable capacity
- Retains access to regional support, diversity and backup
- Keeps large customers participating in shared grid costs



ISOLATED / OFFGRID

- Requires ~70%+ overbuild to maintain comparable reliability
- Lacks regional balancing and emergency support
- Duplicates scarce equipment, labor and capital
- Could shift \$120B-\$169B in transmission costs over 30 years



policy takeaway: integrate growth, don't fragment it

While BTM generation has benefits, it is critically important policies recognize the value of the grid and does not shift costs between classes of customers.

1 PHASE DEVELOPMENT

Use BTM generation to bridge near-term capacity needs while grid infrastructure is built.

2 ASSIGN COSTS CLEARLY

Protect existing customers with transparent interconnection and cost-responsibility rules (e.g. net energy metering).

3 PRESERVE GRID VALUE

Maintain connection and contribution to the shared system where it provides reliability and economic value.

4 PLAN FOR RESILIENCE

Coordinate large-load growth, generation, transmission and distribution as one system.

The grid is what makes that growth scalable, resilient , and affordable.



Thank you!

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