

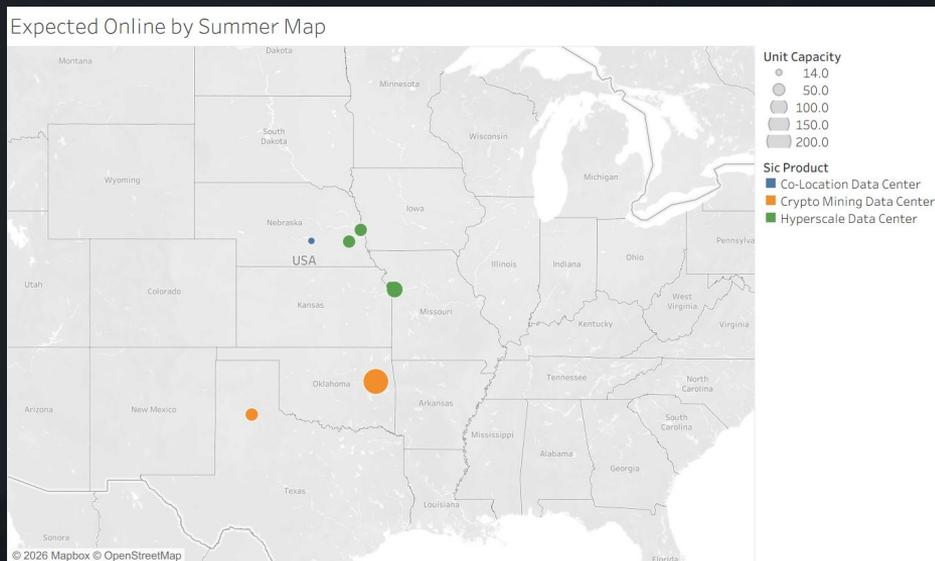


# SPP 2026 Vulcan Summer Analysis Using Vulcan Information

**Why guess when you can know?**



# Datacenter Expected Online By Summer



**516 MW of Data Center Related Demand expected to come online by August 2026.**

**Evenly split between Crypto and Hyperscaler.**





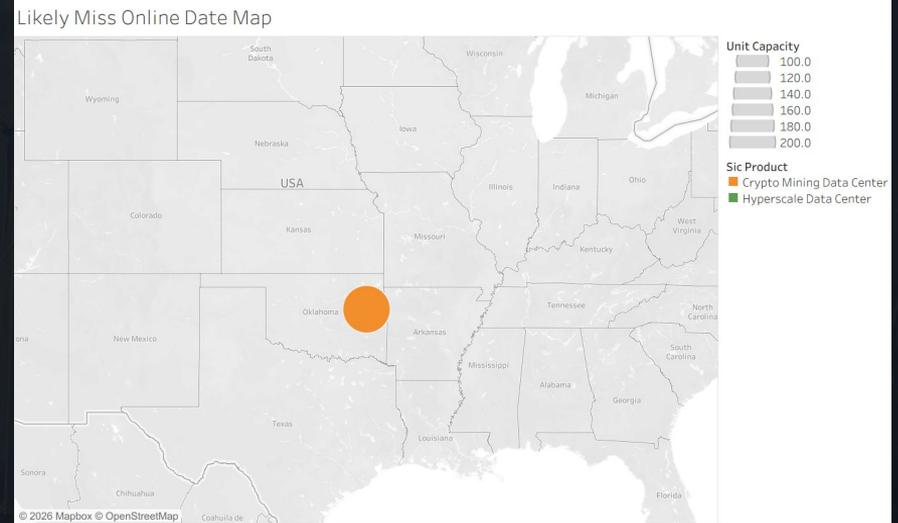
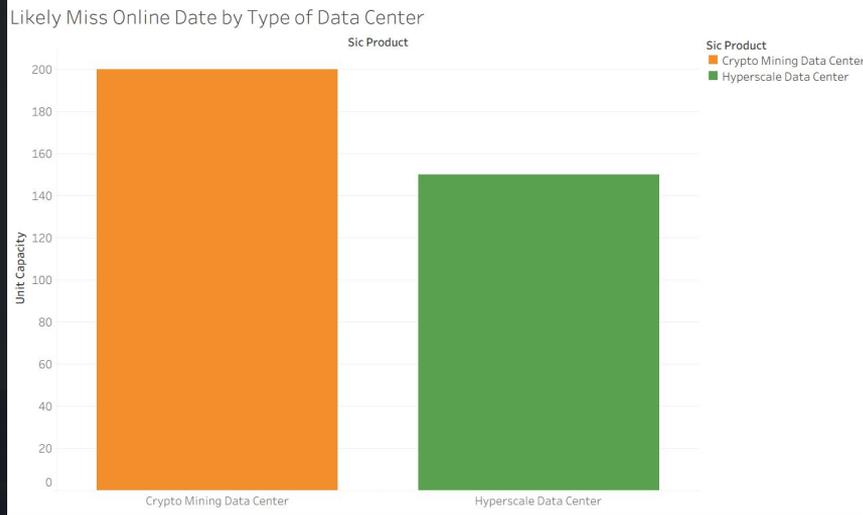
# Datacenter Missing Online Date

Plant Name	Unit Id	Unit State	Month of Startup Date	Month of Vulcan Median Online	
Muskogee Bitcoin Crypt..	2554511	Oklahoma	March 2026	January 2027	200.0
Muskogee Data Center (..	2651681	Oklahoma	May 2026	January 2027	100.0
Grand Total					300.0

**For this summer there is no highly likely not going to be online compared to their estimated online time period per lack of construction. 300 MW falls into the likely category.**



# Datacenter Missing Online Date



**Delays are split between type but all in Oklahoma.**

**Net 216 MW of Data Center related load can be anticipated by summer.**

# 3667683 Muskogee Data Center (MSK1 & MSK2)

3 Units (300 MW), DC01 Planned Operation: 5/31/2026,  
IIR Status: Under Construction, Vulcan Earliest Online: 4/22/2026  
Vulcan Median Online: 1/18/2027



Land Cleared: 4/7/2025



First Structures: 7/9/2025

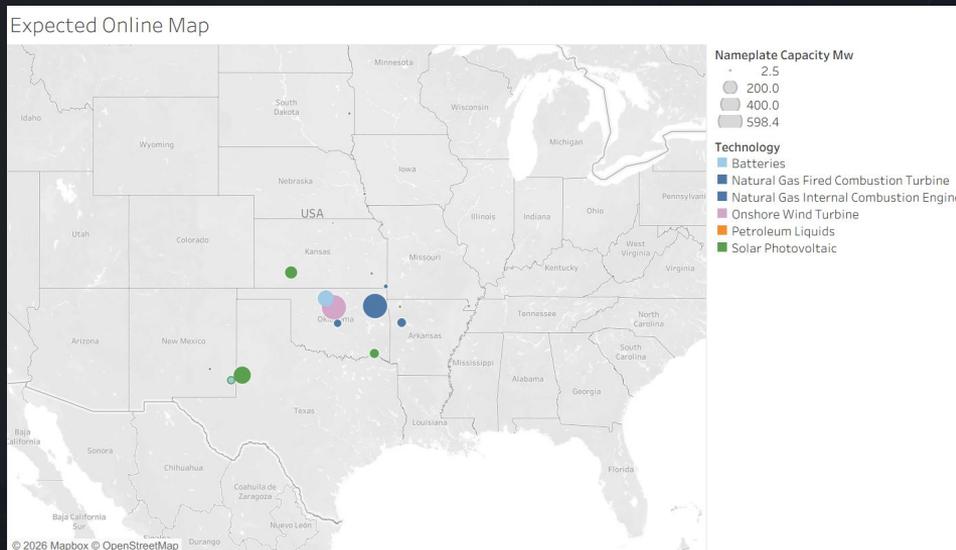


Latest: 1/2/2026

Building shell still incomplete. Unit is likely to miss planned operation.



# Generation Expected Online by Summer



**Over 3.2 GW of generation related resources (1.5 GW Solar & 1.5 GW Gas) expected to come online by August.**

**2.5 GW located in Oklahoma.**



# Generation Missing Online Date

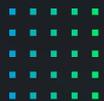
## Highly Likely Missing Online Date

Synmax Id	Plant N.	Eia Status	Plant S.	Vulcan Co.	Month of Vu.	Month of Eia ..	Month of Vu..	
62494-SCBAT	Skeleto..	(V) Under constr..	OK	none	August 2026	December 2025	August 2026	252
62494-SCSOL	Skeleto..	(V) Under constr..	OK	none	August 2026	December 2025	August 2026	250
63628-1	Tinker 1	(V) Under constr..	OK	Confirmed	April 2027	March 2026	April 2027	48
63628-2	Tinker 2	(V) Under constr..	OK	Confirmed	April 2027	March 2026	April 2027	48
68088-TS2	Twelve..	(U) Under constr..	OK	Confirmed	August 2026	March 2026	August 2026	52
68088-TS12	Twelve..	(V) Under constr..	OK	Identified	August 2026	March 2026	August 2026	152
Grand Total								802

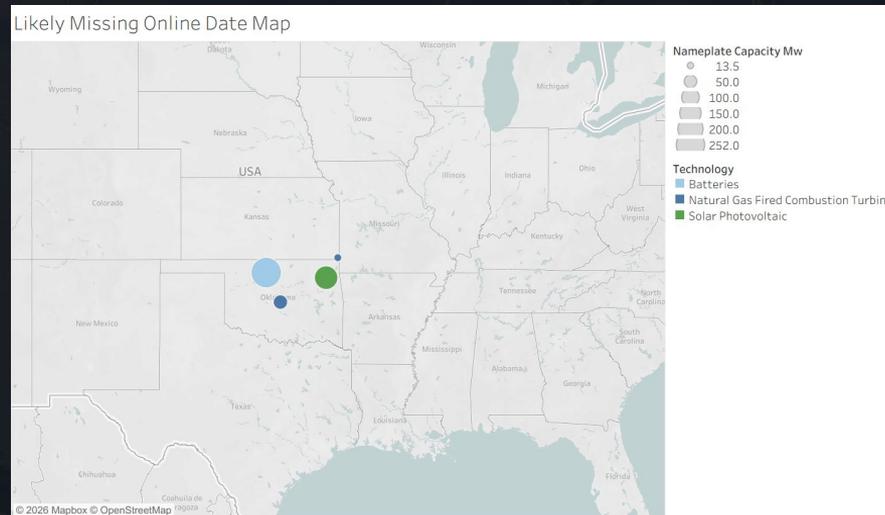
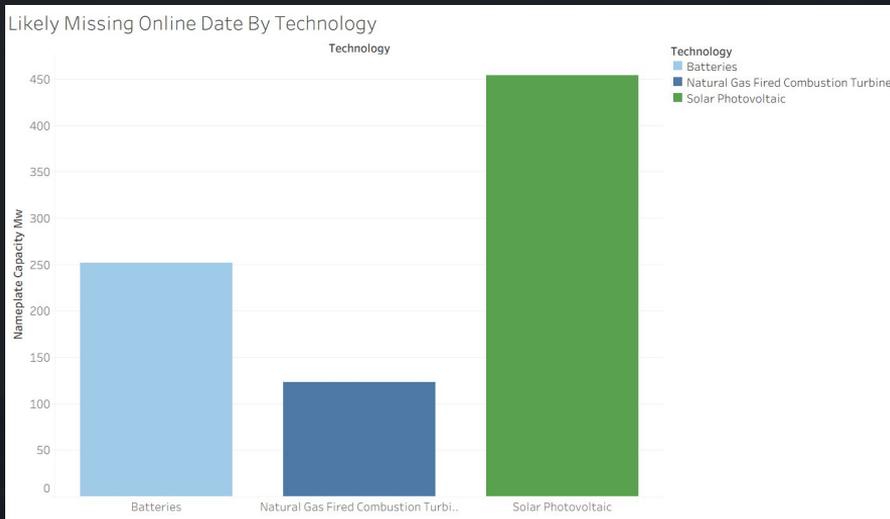
## Likely Missing Online Date

Synmax Id	Plant Name	Technology	Month of Plan..	Year of..	Vulcan Co..	Month of Vulc..	
1239-13	Riverton	Natural Gas Fire..	August 2026	Null	Null	October 2026	13.5
1239-14	Riverton	Natural Gas Fire..	August 2026	Null	Null	October 2026	13.5
62494-SCBAT	Skeleton Creek E..	Batteries	December 2025	2026	none	August 2026	252.0
62494-SCSOL	Skeleton Creek E..	Solar Photovolta..	December 2025	2026	none	August 2026	250.0
63628-1	Tinker	Natural Gas Fire..	March 2026	2027	Confirmed	April 2027	48.1
63628-2	Tinker	Natural Gas Fire..	March 2026	2027	Confirmed	April 2027	48.1
68088-TS2	Twelvemile Sola..	Solar Photovolta..	March 2026	2026	Confirmed	August 2026	52.2
68088-TS12	Twelvemile Sola..	Solar Photovolta..	March 2026	2026	Identified	August 2026	152.0
Grand Total							829.4

**For this summer there is 802 MW highly likely not going to be online compared to their estimated online time period per lack of construction. An incremental 27 MW falls into the likely category totaling 829 MW of generation not being online by summer compared to expectation.**



# Generation Missing Online Date



**Delays are majority Solar at two projects in OK - Skeleton Creek & Twelve Mile.**

**Net 2.4 GW of generation resources can be expected to come online by summer.**



## 68088 Twelvemile Solar 1 & 2

204 MW, Planned Operation: 3/2026, EIA Status: (V) Under Construction, more than 50 percent complete

Vulcan Earliest Online: 8/13/2026



No panels placed.  
Facility very likely  
to miss planned  
operation.

