

AI Power & Site Readiness

Company: Amazon (ADS / AWS)

Site / campus: PECO TSA / Falls Township, PA

Phase: Phase 1

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Evidence

Verdict

This site looks strong on power deliverability and reliability proxies, but weak on schedule risk. The final score is a weighted blend of schedule, deliverability, cost, carbon, and reliability views.

Site Readiness Index

62% index

Proxy

Confidence 66%

Better than median

Benchmark

Median: 45% · Top quartile: 54%

Top drivers (why)

1

Schedule risk (slippage)

Commercial operation date hit probability is low and expected schedule slippage is large relative to the pinned cohort.

2

Power deliverability strength

Deliverable capacity by target is materially above the pinned cohort median and top quartile.

3

Low reliability risk + strong renewables

Reliability risk index is favorable, and contracted renewables coverage is high.

KPI snapshot (median / top quartile benchmarks)

KPI	Current	Benchmark (Median / Top quartile)	Confidence
Site Readiness Index Current	62% index Proxy Better than median	45% / 54% median / top quartile	66% proxy-heavy
Probability of Hitting In-Service Date Current	14% Estimated Worse than median	30% / 46% median / top quartile	69%
Schedule Slippage (Days) Current	502 days Estimated Worse than median	341 / 456 median / top quartile	69%
Deliverable Capacity by Target (MW) Current	106.243 MW Computed Better than median	44.73 / 68.89 median / top quartile	56%
Blended Effective Power Rate (\$/MWh) Current	\$145 USD/MWh Computed	— / — median / top quartile	81%
Expected Emissions Intensity (kgCO₂e/MWh) Current	271.8 kgCO ₂ e/MWh Proxy Better than median	348.95 / 458.42 median / top quartile	75% proxy-heavy
Reliability Risk Index Current	0% index Computed Better than median	44% / 64% median / top quartile	66%
Total Delay Cost Exposure (\$) Current	\$282.7M Proxy	— / — median / top quartile	75% proxy-heavy
Renewable Content (%) Current	100% Proxy	11% / 23% median / top quartile	70% proxy-heavy

Confidence & gaps

- Power purchase agreement price is a placeholder derived from the blended power-rate estimate; replace with market quote data when available.
- On-site solar commitment, transformer expedite option, and expedite procurement budget are not publicly disclosed for this site/phase and are shown as Not available (we do not assume 0).
- Battery storage commitment is not yet available for this subject; power purchase agreement availability uses a PJM portfolio proxy (851 MW from two disclosed projects) and is not dedicated to Falls Township Phase 1.

As-of: 2026-02-13 · Benchmark cohort: AI Supply Chain | US | 2025 Q3

Outside-in, non-binding. Subject to validation.

subject_key: amazon-peco-tsa-phase-1 · contract_version: 1.0.0

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