AI Power & Site Readiness

Company: Applied Digital

Site / campus: Ellendale, ND (CoreWeave tenant)

Phase: Phase 1 (50 MW)

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Verdict

Phase 1 appears already in service (realized milestone), but deliverable capacity is below the peer cohort median under the curtailment-risk proxy. Carbon intensity remains worse than the pinned peer cohort. Renewable content is shown as a state grid-mix proxy. The final score is a weighted blend of schedule, deliverability, cost, carbon, and reliability views.

Site Readiness Index

86% index

Proxy   Confidence 71%   Better than median

Benchmark
Median: 45% · Top quartile: 54%

Top drivers (why)

1

Schedule outlook (time-to-power)

In-service hit probability is 1.0 and expected slippage is 0 days (realized Phase 1 milestone), but schedule-chain inputs are proxy-heavy and marked stale; validate current execution details before external distribution.

2

Power deliverability strength

Deliverable capacity by target is below the peer cohort median under the curtailment-risk proxy; validate node-level deliverability and curtailment exposure for the 50 MW tranche.

3

Carbon intensity headwind

Expected emissions intensity is worse than the peer cohort median, while renewable content (grid-mix proxy) is above the top quartile; validate contracted renewables posture before external distribution.

KPI snapshot (median / top quartile benchmarks)

KPI	Current	Benchmark (Median / Top quartile)	Confidence
Site Readiness Index Stale	**86%** index Proxy Better than median	45% / 54% median / top quartile	**71%** proxy-heavy
Probability of Hitting In-Service Date Stale	**100%** Inferred Better than median	30% / 46% median / top quartile	**70%**
Schedule Slippage (Days) Stale	**0** days Inferred Better than median	341 / 456 median / top quartile	**70%**
Deliverable Capacity by Target (MW) Stale	**37.137** MW Computed Worse than median	44.73 / 68.89 median / top quartile	**79%**
Blended Effective Power Rate ($/MWh) Current	**$85** USD/MWh Computed	— / — median / top quartile	**81%**
Expected Emissions Intensity (kgCO$_2$e/MWh) Current	**420.299** kgCO2e/MWh Proxy Worse than median	348.95 / 458.42 median / top quartile	**58%** proxy-heavy
Reliability Risk Index Stale	**13%** index Computed Better than median	44% / 64% median / top quartile	**55%**

Total Delay Cost Exposure ($) Stale	**$0** Proxy	— / — median / top quartile	**79%** proxy-heavy
Renewable Content (%) Current	**26%** Computed `Better than median`	11% / 23% median / top quartile	**95%**

Next step

Validate the grid deliverability/curtailment posture for the 50 MW tranche and confirm any contracted renewables posture, then refresh this snapshot.

Confidence & gaps

- Renewable content is a proxy based on state grid renewable generation share; it is not a measure of contracted renewable coverage for this subject.

- Schedule slippage and total delay cost exposure are marked stale in v0 fixtures; validate underlying schedule-chain inputs before external distribution.

- Carbon intensity is worse than the peer cohort median; consider whether contracted renewables or on-site resources change the carbon posture.

As-of: 2026-02-15 · **Benchmark cohort:** AI Supply Chain | US | 2025 Q3
Outside-in, non-binding. Subject to validation.
subject_key: applied-digital-ellendale-nd-phase-1 · contract_version: 1.0.0

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