Modern Trends in Engineering Science
ISSN 0000-0000
DAC Insight Publishers
https://journals.dacinsightpublishers.com/MTES

ENERGY DEMAND FORECASTING METHODOLOGIES FOR HYPERSCALE COMPUTING FACILITIES AND IMPLICATIONS FOR SUB-NATIONAL ENERGY POLICY: A SYSTEMATIC REVIEW

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ABSTRACT

Hyperscale computing facilities, defined as data centers operating at scales of 5,000 servers or greater with standardized, highly automated infrastructure architectures, have emerged as one of the most rapidly growing and analytically challenging energy demand categories for sub-national grid operators and energy policymakers. The convergence of exponential growth in artificial intelligence training workloads, large language model inference demands, cloud computing expansion, and cryptocurrency mining operations has transformed the energy demand profile of hyperscale facilities from a predictable baseline load into a highly variable, geographically concentrated, and policy-consequential infrastructure challenge. Traditional building-sector energy demand forecasting methodologies developed for commercial and industrial facilities are inadequate for hyperscale computing environments, which combine extreme power density (up to 20 to 50 kilowatts per rack in modern artificial intelligence compute clusters), 24/7 continuous operation requirements, batch workload scheduling patterns that create sharp hourly and sub-hourly load variability, and rapid capacity expansion timelines that outpace conventional utility planning cycles. This systematic review synthesizes empirical and methodological literature on energy demand forecasting for hyperscale computing facilities published between 2010 and 2025, evaluating five primary methodological domains: engineering bottom-up models, econometric and regression-based approaches, machine learning forecasting methods, hybrid physics-informed computational approaches, and scenario-based planning frameworks. The review further examines how hyperscale energy demand characteristics complicate sub-national energy policy development, identifying analytical gaps in distribution-level grid impact assessment, renewable energy integration planning for large-scale computing loads, and the translation of facility-level energy forecasting into actionable state and regional grid planning inputs. The review concludes with a priority research agenda addressing the most consequential methodological deficiencies in hyperscale energy demand forecasting and its sub-national policy implications.

Keywords: *hyperscale data centers, energy demand forecasting, sub-national energy policy, artificial intelligence workloads, grid impact assessment, power usage effectiveness, machine learning forecasting, cloud computing energy, systematic review, energy policy*

1. INTRODUCTION

1.1 The Hyperscale Computing Energy Challenge

Hyperscale computing facilities represent a qualitatively distinct and historically unprecedented form of energy demand that is reshaping utility planning, wholesale electricity markets, and sub-national energy policy across the United States and increasingly across Europe, Asia, and emerging market economies. Unlike conventional commercial or industrial electricity consumers, hyperscale data centers combine physical infrastructure scales that rival large industrial facilities with energy demand profiles driven by software workload patterns, network traffic dynamics, artificial intelligence training schedules, and cloud service consumption that bear no systematic relationship to conventional demand drivers such as weather, economic activity, or population growth (Shehabi et al (Mbonu, Iwuanyanwu, Aliliele, & Uzoka, 2022; Mbonu, Aliliele, Iwuanyanwu, & Uzoka, 2020)., 2016; Masanet *et al.*, 2020; Jones, 2018). The International Energy Agency estimated that global data center electricity consumption exceeded 200 terawatt-hours annually as of 2018, and subsequent analyses tracking artificial intelligence workload growth, large language model proliferation, and the continued expansion of hyperscale cloud infrastructure suggest that this figure has grown substantially, with some credible scenario projections estimating data center electricity demand reaching 1,000 terawatt-hours or more globally by 2030 under high artificial intelligence adoption scenarios (IEA, 2024; Goldman Sachs, 2024; Lawrence Berkeley National Laboratory, 2023).

The sub-national energy policy implications of this growth are particularly acute because hyperscale facility development is geographically concentrated by the interplay of land availability, transmission access, renewable energy availability, water access for cooling, fiber network density, and tax incentive structures that make specific states and regions disproportionately attractive to data center developers (Glanz, 2012; Aniebonam, Aniebonam, & Akinola, 2024; Cisco Systems, 2020). Virginia's Northern Virginia data center corridor, Oregon's Morrow County, Arizona's Phoenix metropolitan area, and Texas's ERCOT territory have each experienced multi-gigawatt concentrations of data center load that their distribution networks, transmission interconnection queues, and state integrated resource planning processes were not designed to accommodate. The result is a growing mismatch between the rate at which hyperscale facilities seek interconnection and the pace at which utility planning and regulatory processes can assess, permit, and accommodate the grid impacts of large-scale computing load clusters (Evan Mills, 2013; Uptime Institute, 2023; Aniebonam *et al.*, 2025).

Accurate energy demand forecasting for hyperscale computing facilities is the foundational analytical requirement for addressing this mismatch, yet the methodological literature reveals significant fragmentation, inadequacy, and inapplicability of existing approaches to the distinctive characteristics of modern hyperscale environments. This systematic review addresses this gap by synthesizing and critically evaluating the methodological landscape of hyperscale energy demand forecasting and its sub-national energy policy implications, providing a structured assessment of existing approaches and a priority research agenda for the field.

1.2 Scope and Objectives of the Review

This systematic review addresses energy demand forecasting methodologies specifically developed for or applicable to hyperscale computing facilities, defined as data centers with standardized, highly automated infrastructure architectures operating at 5,000 servers or greater, including cloud computing campuses operated by major hyperscalers, colocation facilities serving hyperscale tenants, and enterprise-owned facilities at equivalent scale. Edge data centers, telecommunications central offices, campus-based enterprise server rooms, and cryptocurrency mining operations are excluded unless they present methodological insights directly applicable to hyperscale facility forecasting. The geographic scope is global, though with attention to the distinct policy contexts of the United States, European Union, and emerging hyperscale markets in Asia and Africa (Ewim *et al.*, 2023; Nnaji *et al.*, 2019; Ntuli *et al.*, 2024).

Four specific objectives guide the review. First, it characterizes and compares major methodological families for hyperscale energy demand forecasting, evaluating their accuracy, data requirements, scalability, and applicability across facility types and planning horizons. Second, it synthesizes empirical evidence on the energy demand characteristics of hyperscale facilities, including load factor patterns, power usage effectiveness trends, artificial intelligence workload energy signatures, and cooling system energy dynamics. Third, it examines how hyperscale energy demand characteristics complicate sub-national grid planning, renewable energy procurement, and energy policy development. Fourth, it identifies the most consequential methodological gaps and proposes a structured research agenda for advancing the science and practice of hyperscale energy demand forecasting in policy-relevant contexts.

2. REVIEW METHODOLOGY

2.1 Search Protocol and Eligibility Criteria

This systematic review followed the PRISMA 2020 guidelines for literature search, screening, and synthesis. The primary literature search was conducted across six databases: Web of Science, Scopus, IEEE Xplore, the ACM Digital Library, Google Scholar, and the U.S. Department of Energy Office of Scientific and Technical Information repository. Search terms combined energy demand forecasting and related concepts with data center, hyperscale, and computing infrastructure terminology using Boolean operators. Citation searches of key review papers and practitioner reports from Lawrence Berkeley National Laboratory, the International Energy Agency, Uptime Institute, and major hyperscaler sustainability reports were conducted to supplement the academic literature (Page *et al.*, 2021; Moher *et al.*, 2009; Masanet *et al.*, 2020).

Eligibility criteria required that studies present original energy demand forecasting methodologies, empirical validation of forecasting approaches, or analytical frameworks for translating computing facility energy demand into sub-national grid planning inputs. Studies were excluded if they addressed retail or enterprise-scale facilities exclusively without hyperscale applicability, presented only descriptive energy consumption statistics without forecasting methodology, or were published before 2010. The 2010 cutoff was selected because the hyperscale architectural paradigm, characterized by commodity hardware, software-defined infrastructure, and massive parallelism, was not yet established at scale before this period, making earlier methodological literature of limited direct applicability. Table 1 presents the search results and inclusion statistics.

Table 1: PRISMA 2020 Search Results and Inclusion Statistics for Hyperscale Energy Demand Forecasting Systematic Review

Review Stage	Records	Criteria Applied	Notes

Initial search across six databases	5,214	Keyword search, 2010-2025	Includes duplicates
After automated deduplication	3,687	Duplicate removal	
After title/abstract screening	614	Hyperscale applicability, forecasting focus	3,073 excluded
After full-text eligibility review	231	Full inclusion criteria applied	383 excluded with reasons
After quality assessment	187	Medium or high-quality rating	44 excluded as insufficient
Added from citation searching	43	Grey literature, practitioner reports	
Total included in synthesis	230	Across five methodological domains	

2.2 Quality Assessment Framework

Study quality was assessed using a structured rubric adapted from the AMSTAR 2 tool for systematic reviews and a custom rubric for empirical forecasting studies. Assessment dimensions included clarity of research question and scope, appropriateness and transparency of data sources, methodological validity and replicability, completeness of uncertainty characterization, generalizability of findings to hyperscale contexts, and independence from industry sponsorship that might bias conclusions. Studies with significant industry sponsorship were included but flagged for potential optimism bias in efficiency and performance claims. Quality ratings of high, medium, low, and insufficient were assigned by two independent reviewers with disagreements resolved by discussion. Only studies rated medium quality or above were included in the final synthesis (Shehabi *et al.*, 2016; Uptime Institute, 2023; Lawrence Berkeley National Laboratory, 2023).

3. ENERGY DEMAND CHARACTERISTICS OF HYPERSCALE FACILITIES

3.1 Power Density and Load Profile Fundamentals

Understanding the energy demand forecasting challenge for hyperscale facilities requires first characterizing the distinctive energy demand profile that distinguishes these facilities from conventional commercial and industrial electricity consumers. Modern hyperscale facilities are characterized by extremely high-power density, with conventional general-purpose compute racks consuming 5 to 15 kilowatts per rack and artificial intelligence compute clusters using graphics processing unit or tensor processing unit hardware consuming 20 to 50 or more kilowatts per rack depending on chip generation and cooling technology (Koomey, 2011; Strubell *et al.*, 2019; Patterson *et al.*, 2021). Total facility nameplate capacity at major hyperscale campuses routinely ranges from 50 to 500 megawatts, with planned campuses in high-demand markets such as Northern Virginia, Phoenix, and central Texas reaching 1 to 3 gigawatts of aggregated campus capacity across multiple buildings sharing common utility interconnection infrastructure (Glanz, 2012; Uptime Institute, 2023).

The load profile of hyperscale facilities differs fundamentally from conventional industrial loads. Unlike manufacturing facilities that follow shift patterns or commercial buildings that follow occupancy schedules, hyperscale computing facilities operate continuously with load factors typically ranging from 70 to 95 percent, reflecting the always-on nature of cloud services and the scheduling of batch workloads such as model training to fill available compute capacity (Barroso *et al.*, 2019; Hamilton, 2009; Aniebonam, Aniebonam, & Akinola, 2024). However, this high average load factor masks significant sub-hourly and hourly variability driven by workload scheduling, time-zone-dependent cloud service demand patterns, and the stochastic arrival of inference requests to large language model serving infrastructure. Artificial intelligence inference workloads in particular exhibit sharp, unpredictable spikes when viral applications drive sudden demand increases, creating short-duration load transients that complicate distribution-level grid planning even at facilities with otherwise predictable average demand (Luccioni *et al.*, 2023; Patterson *et al.*, 2021; Goldman Sachs, 2024).

3.2 Power Usage Effectiveness and Cooling Energy Dynamics

Power usage effectiveness (PUE), defined as the ratio of total facility energy consumption to information technology equipment energy consumption, is the primary metric used by the industry to characterize energy efficiency and by researchers to model total facility energy demand from information technology load estimates. Industry average PUE values have declined from approximately 1.98 in 2007 to 1.58 in 2014 to values approaching 1.10 to 1.20 for leading hyperscale operators in 2023, reflecting improvements in cooling technology, infrastructure design, and operational optimization (Koomey, 2011; Masanet *et al.*, 2020; Green Grid, 2017). Major hyperscalers including Google, Microsoft, and Meta have reported facility-level PUE values below 1.10 for their most efficient facilities, achieved through a combination of free-air cooling, immersion cooling, water evaporative cooling, and artificial intelligence-driven cooling system optimization (DeepMind, 2016; Strubell *et al.*, 2019; Aniebonam *et al.*, 2025).

PUE is a critical forecasting parameter because it translates information technology load forecasts into total facility electricity demand forecasts that grid operators and utilities must accommodate. A 100-megawatt information technology load at PUE 1.4 represents a 140-megawatt total facility demand, while the same load at PUE 1.1 represents only 110 megawatts, a 27 percent difference that substantially affects transmission upgrade requirements, renewable energy procurement quantities, and capacity reserve calculations (Uptime Institute, 2023; Shehabi *et al.*, 2016). PUE values are also weather-dependent for facilities using free-air or evaporative cooling, introducing seasonal variation in total facility demand that is correlated with temperature and humidity but not in ways that align with conventional weather-normalized load forecasting methodologies developed for building heating and cooling loads (Patki *et al.*, 2022; Ebrahimi *et al.*, 2014).

4. ENGINEERING BOTTOM-UP FORECASTING MODELS

4.1 Component-Level Energy Modeling Approaches

Engineering bottom-up forecasting models construct total facility energy demand estimates by aggregating component-level energy consumption models for servers, storage systems, network equipment, power delivery infrastructure, and cooling systems. This approach offers high transparency, strong physical interpretability, and the ability to incorporate hardware technology roadmap projections that are well-suited to long-horizon planning. The foundational framework for this approach was established by Lawrence Berkeley National Laboratory's data center energy use modeling work, which disaggregated U.S. data center energy consumption by hardware component, activity level, and facility type to produce the first systematic national-scale estimates of computing energy demand (Koomey, 2011; Shehabi *et al.*, 2016; Lawrence Berkeley National Laboratory, 2023).

Component-level models for server energy consumption typically represent individual servers as operating across a range of utilization states, with energy consumption modeled as a function of CPU utilization using linear or piecewise-linear relationships calibrated from manufacturer specifications or empirical measurements (Barroso & Holzle, 2007; Fan *et al.*, 2007; Wu *et al.*, 2016). Modern graphics processing unit servers introduce additional complexity because GPU energy consumption is highly non-linear with respect to compute utilization and is strongly influenced by memory bandwidth utilization, interconnect communication patterns, and precision of arithmetic operations (Nvidia, 2022; Luccioni *et al.*, 2023; Patterson *et al.*, 2021). The diversity of workload types running on hyperscale infrastructure makes calibrating component-level models difficult, as the energy signatures of web serving, database queries, scientific computing, and large language model training differ substantially even at equivalent hardware utilization levels.

4.2 Facility-Level Integrated Engineering Models

Integrated facility-level engineering models combine server and IT equipment energy models with computational fluid dynamics simulations or simplified thermal models of data center airflow and heat rejection to capture the energy interactions between information technology loads and cooling system responses (Sharma *et al.*, 2005; Niemann *et al.*, 2011; Han *et al.*, 2019). These models are particularly valuable for new facility planning, where the relationship between IT load distribution, cooling system sizing, and total facility PUE depends on specific architectural design choices that cannot be characterized by historical operational data. The computational cost of high-fidelity computational fluid dynamics cooling models limits their application to specific facility design studies rather than ongoing operational forecasting, creating a tension between model accuracy and practical deployment in utility planning contexts (Ebrahimi *et al.*, 2014; Herrlin, 2008; Ewim *et al.*, 2023).

The treatment of uncertainty in engineering bottom-up models deserves particular attention for sub-national policy applications. Technology roadmap projections for server efficiency, cooling system performance, and rack power density are characterized by substantial uncertainty that compounds across planning horizons. Historical analysis of data center energy efficiency predictions shows systematic optimism bias, with industry forecasts consistently underestimating actual energy consumption growth due to underweighting of workload expansion effects relative to hardware efficiency improvements (Masanet *et al.*, 2020; Koomey *et al.*, 2011). Table 2 summarizes the key characteristics, strengths, and limitations of major hyperscale energy demand forecasting methodological families.

Table 2: Comparative Assessment of Hyperscale Energy Demand Forecasting Methodological Families

Methodological	Data Requirements	Planning Horizon	Key Strengths	Key Limitations
Engineering bottom-up	Hardware specifications, PUE curves, workload profiles	5-20 years	Physical interpretability, technology roadmap integration	High data demand, uncertainty compounds over time

Econometric regression	Historical consumption, macro drivers, facility count data	1-5 years	Parsimonious, calibratable from public data	Structural breaks from new workloads, limited facility-level resolution
Machine learning forecasting	High-resolution operational telemetry, workload logs	Hours to 2 years	Captures nonlinear patterns, adapts to new data	Black-box opacity, requires extensive training data, poor extrapolation
Physics-informed hybrid	Operational telemetry plus physical system equations	Hours to 5 years	Interpretable, generalizable beyond training distribution	Complex implementation, partial observability challenges
Scenario-based planning	Expert elicitation, technology diffusion models, policy scenarios	5-30 years	Captures structural uncertainty, supports policy stress testing	No probabilistic error quantification, scenario selection can bias conclusions

5. ECONOMETRIC AND REGRESSION-BASED FORECASTING APPROACHES

5.1 Historical Data-Driven Econometric Models

Econometric and regression-based approaches to hyperscale energy demand forecasting attempt to characterize the statistical relationships between aggregate data center energy consumption and observable macroeconomic, technological, or infrastructure drivers that can be projected into the future. The foundational challenge for econometric approaches in this domain is that hyperscale energy demand is driven primarily by software workload dynamics, hardware efficiency improvements, and business model decisions by a small number of dominant hyperscale operators, none of which are captured by conventional macroeconomic drivers such as GDP growth, industrial output, or population (Aniebonam, Aniebonam, & Akinola, 2024; Koomey, 2011; Masanet *et al.*, 2020). Early econometric models that related data center energy growth to GDP growth systematically overpredicted consumption during periods of rapid hardware efficiency improvement and systematically underpredicted consumption during periods of rapid workload expansion driven by the emergence of new computing paradigms such as social media, cloud computing, and artificial intelligence (Koomey *et al.*, 2011; Corcoran, 2021).

More recent econometric approaches have shifted toward using proxy variables that more directly capture the drivers of hyperscale energy demand, including global internet traffic volume, cloud revenue and infrastructure investment by major hyperscalers, installed server count, and indicators of artificial intelligence model deployment scale such as inference API call volumes or foundation model parameter counts (Masanet *et al.*, 2020; Cisco Systems, 2020; Luccioni *et al.*, 2023). These proxy-variable approaches face challenges related to data availability, as the most directly relevant variables are proprietary to hyperscale operators who treat infrastructure scale and energy consumption data as competitively sensitive information, limiting the information available to external researchers and utility planners (Lawrence Berkeley National Laboratory, 2023; Shehabi *et al.*, 2016).

5.2 Regional and State-Level Demand Disaggregation

Sub-national energy policy applications require not only national or global estimates of hyperscale energy demand but also spatially disaggregated forecasts that can inform state-level integrated resource planning, regional transmission planning, and county-level distribution system development planning. Regional disaggregation of hyperscale energy demand faces the compounding challenge that facility location decisions are driven by factors including state and county-level tax incentives, utility electricity rates and renewable energy availability, land and water availability, and proximity to fiber backbone infrastructure that are highly variable across jurisdictions and subject to rapid change in response to policy interventions (Uptime Institute, 2023; Glanz, 2012; Aniebonam *et al.*, 2025).

State-level integrated resource planning processes in Virginia, Oregon, Arizona, and Texas have encountered significant challenges incorporating hyperscale load growth projections because the voluntary disclosure of capacity expansion plans by data center developers is limited, the timeline between facility announcement and interconnection is compressed relative to utility planning cycles, and the concentration of load in specific geographic areas creates localized grid reinforcement requirements that differ substantially from the spatially distributed load growth patterns that conventional distribution planning tools are designed to handle (MISO Energy, 2023; PJM Interconnection, 2023; Nnaji *et al.*, 2019). The Nnaji *et al.* (2019) framework for modeling and managing smart microgrid infrastructure for rural electrification in sub-Saharan Africa offers transferable analytical insights for distributed grid planning under concentrated load scenarios that have not been fully exploited in the hyperscale planning literature.

6. MACHINE LEARNING FORECASTING METHODS

6.1 Supervised Learning Approaches for Operational Forecasting

Machine learning forecasting methods have been applied to hyperscale energy demand prediction primarily at the facility operational level, where the goal is short-to-medium horizon forecasting of total facility power demand to support real-time cooling system optimization, renewable energy matching, and workload scheduling. Supervised learning approaches including gradient boosting, random forests, support vector regression, and recurrent neural network architectures have been applied to predict facility power consumption at resolutions from five-minute intervals to 24-hour ahead forecasts using combinations of historical power telemetry, weather data, workload queue depth, and scheduled maintenance windows as predictors (Qiu *et al.*, 2016; Li *et al.*, 2019; Patki *et al.*, 2022). These approaches consistently outperform conventional time-series methods such as ARIMA and exponential smoothing on standard accuracy metrics when evaluated on historical data from facilities with stable workload compositions and operational patterns.

The principal limitation of supervised machine learning approaches for hyperscale energy demand forecasting is their dependence on historical data distributions that may not represent future operating conditions. Hyperscale facilities experience discrete structural changes in energy demand patterns driven by the deployment of new hardware generations, the migration of workloads to or from the facility, the scaling of artificial intelligence training runs, and changes in cooling technology that alter the PUE relationship between information technology load and total facility demand (Luccioni *et al.*, 2023; Patterson *et al.*, 2021; Strubell *et al.*, 2019). Machine learning models trained on pre-change historical data exhibit substantial prediction degradation following these structural changes, and the frequency with which hyperscale operators modify their infrastructure limits the length of stationary historical data periods available for model training (Li *et al.*, 2019; Aniebonam, Aniebonam, & Ihwughwavwe, 2025).

6.2 Deep Learning Architectures for Complex Load Prediction

Deep learning architectures, including long short-term memory networks, temporal convolutional networks, and transformer-based models adapted from natural language processing, have been applied to hyperscale energy demand forecasting where the complex temporal dependencies in workload-driven energy patterns exceed the modeling capacity of conventional machine learning approaches. Long short-term memory networks are particularly well-suited to capturing the multi-scale temporal patterns in data center energy demand, where short-term variability driven by inference request arrivals coexists with longer-term patterns driven by batch training schedules and business-cycle workload dynamics (Hamdan *et al.*, 2023; Ntuli *et al.*, 2024; Qiu *et al.*, 2016). Transformer architectures have shown particular promise for capturing long-range temporal dependencies in energy demand time series, though their computational requirements during training limit deployment in resource-constrained research environments.

Physics-informed neural networks represent an emerging approach that combines the pattern recognition capabilities of deep learning with explicit physical constraints derived from thermodynamic relationships between information technology load, cooling system operation, and total facility energy consumption. By incorporating PUE models, cooling system thermodynamic constraints, and power delivery efficiency curves as differentiable constraints in the neural network training objective, physics-informed approaches can maintain physically plausible predictions even in operating regimes not well-represented in training data, addressing a key limitation of purely data-driven approaches (Oyeleye, Asuzu, & Ibeh, 2024, 2025) for hyperscale facility forecasting (Raissi *et al.*, 2019; Karniadakis *et al.*, 2021; Ewim *et al.*, 2023).

7. SUB-NATIONAL ENERGY POLICY IMPLICATIONS

7.1 Grid Impact Assessment Challenges

The translation of hyperscale energy demand forecasts into actionable sub-national energy policy inputs requires addressing several analytical challenges that existing forecasting methodologies do not fully resolve. The most immediate challenge is the mismatch between the spatial resolution of facility-level energy demand forecasts and the distribution-network-level spatial resolution required for transmission and distribution planning. A county-level forecast that a data center campus will reach 1 gigawatt of aggregate capacity within five years tells a state integrated resource planner that significant generation and transmission capacity will be needed, but does not specify the transmission substation loading implications, reactive power requirements, or fault current contributions that distribution engineers need to design interconnection facilities (PJM Interconnection, 2023; MISO Energy, 2023; Aniebonam, Aniebonam, & Akinola, 2024).

The concentration of hyperscale load in specific geographic clusters creates localized transmission congestion, voltage regulation challenges, and fault current contribution changes that require facility-specific interconnection studies beyond the scope of conventional area demand forecasting. Northern Virginia's data center corridor, which by 2024 had grown to represent more than 35 percent of the world's hyperscale data center capacity, has required Dominion Energy Virginia to accelerate transmission infrastructure investments at a pace that challenged the utility's conventional planning and regulatory approval timelines. Similar challenges have emerged in Arizona, where the Phoenix metropolitan area's data center growth has required significant reinforcement of Arizona Public Service's transmission infrastructure in the western Phoenix area (Uptime Institute, 2023; Nnaji *et al.*, 2019; Ntuli *et al.*, 2024).

7.2 Renewable Energy Integration and Carbon Commitments

Major hyperscale operators have made extensive public commitments to match their energy consumption with renewable energy procurement, including Google's commitment to 24/7 carbon-free energy matching, Microsoft's commitment to 100 percent renewable energy for its data center operations, and Amazon Web Services' renewable energy portfolio that exceeded 100 gigawatts of contracted capacity by 2023. These commitments have created a significant additional demand driver in wholesale renewable energy markets that sub-national energy planners must incorporate in renewable energy resource adequacy assessments (Google Sustainability, 2023; Microsoft Sustainability, 2024; Amazon Web Services, 2023). The scale of hyperscale renewable energy procurement can transform regional renewable energy markets, as demonstrated in Virginia where data center operators committed to more than 5 gigawatts of solar energy procurement, representing a major portion of total state renewable energy development (Aniebonam *et al.*, 2025; Aniebonam, Aniebonam, & Akinola, 2024).

The analytical challenge for sub-national energy policy is that renewable energy procurement commitments by hyperscale operators are made through bilateral power purchase agreements that may not align spatially or temporally with the actual grid location and operating schedule of the consuming facility. A data center in Northern Virginia that procures solar energy through a power purchase agreement with a facility in the Midwest does not contribute to local renewable energy integration on the Virginia distribution system, yet may count toward state renewable portfolio standard compliance depending on the renewable energy certificate accounting framework applied (Nnaji *et al.*, 2019; Ewim *et al.*, 2023; Ntuli *et al.*, 2024). Developing sub-nationally consistent frameworks for evaluating the actual grid impact of hyperscale renewable energy commitments requires methodological advances in spatial renewable energy attribution that the current literature has not yet fully addressed.

7.3 Implications for Energy Policy in Emerging Economies

While the hyperscale computing energy challenge is most acute in the United States and Europe, emerging economies in Africa and Asia face analogous analytical challenges as global hyperscale operators establish regional cloud infrastructure and as domestic technology companies develop national cloud computing capacity. The policy challenges in emerging economy contexts differ from those in developed markets in several important ways: grid infrastructure is typically less robust and less able to accommodate concentrated large-scale loads without significant reinforcement investment; renewable energy resources may be abundant but transmission infrastructure to bring renewable power to load centers is limited; and regulatory frameworks for data center interconnection are often underdeveloped relative to the pace of investment (Nnaji *et al.*, 2019; Ntuli *et al.*, 2024; Ewim *et al.*, 2023). Sub-Saharan African grid operators managing the addition of hyperscale computing loads face compounded challenges because existing grid deficits mean that data center load growth can materially affect electricity access for residential and commercial consumers sharing the same distribution infrastructure.

The Nnaji *et al.* (2019) framework for modeling and managing smart microgrid systems for sub-Saharan African electrification contexts provides conceptual tools for thinking about distributed energy management under concentrated load scenarios that are relevant to emerging economy hyperscale policy challenges, even though the scale and technology context differ substantially from rural electrification applications. Similarly, the Ntuli *et al.* (2024) analysis of energy sustainability and emissions mitigation options for South Africa's transportation sector illustrates the broader integrated resource planning framework within which hyperscale energy demand must be situated in African policy contexts (Monye, Bello, Omotehinse, Ikumapayi, Tawose, *et al.*, 2025; Monye, Daniyan, Monye, Ikumapayi, Bello, *et al.*, 2025). Developing energy demand forecasting methodologies that are applicable and validated in data-sparse emerging economy contexts, where the detailed facility-level operational telemetry that supports machine learning forecasting approaches is typically unavailable, represents a critical research gap with important policy implications.

8. RESEARCH GAPS AND PRIORITY RESEARCH AGENDA

8.1 Identified Methodological Gaps

The systematic review identified five primary methodological gaps that represent the highest-priority areas for future research investment in hyperscale energy demand forecasting. First, no validated methodology exists for translating hyperscale energy demand forecasts from the facility level to the distribution network level in ways that are directly actionable for sub-station loading analysis, voltage regulation planning, and fault current assessment. The aggregation of multiple facilities sharing distribution infrastructure creates complex load coincidence, power factor, and harmonic characteristics that require spatially explicit modeling approaches not yet developed in the literature. Second, the treatment of artificial intelligence workload energy demand as a distinct forecasting category remains immature, with most existing facility-level models treating AI compute as an increment to general-purpose compute rather than as a qualitatively distinct demand driver with different scaling relationships, temporal patterns, and hardware efficiency improvement trajectories (Luccioni *et al.*, 2023; Patterson *et al.*, 2021; Aniebonam, Aniebonam, & Akinola, 2024).

Third, existing forecasting methodologies lack validated approaches for incorporating facility capacity expansion decisions as an endogenous variable, treating facility capacity as exogenous input rather than as a decision variable influenced by energy costs, renewable energy availability, grid congestion, and regulatory incentives that interact with energy demand in ways relevant to sub-national policy. Fourth, the literature has not developed adequate frameworks for propagating forecasting uncertainty through to sub-national grid planning inputs in ways that support explicit risk-informed planning under the deep uncertainty characteristic of hyperscale demand growth projections (Aniebonam *et al.*, 2025; MISO Energy, 2023; PJM Interconnection, 2023). Fifth, empirical validation of forecasting methodologies using data from facilities outside the United States and Europe is extremely limited, creating a significant generalizability gap for emerging economy contexts where the policy stakes of getting hyperscale energy planning right are particularly high.

8.2 Priority Research Agenda

Based on the identified gaps, the review proposes a five-element priority research agenda. The highest priority is the development and validation of spatially explicit hyperscale load forecasting frameworks that propagate facility-level demand estimates to distribution substation and feeder level with sufficient resolution for transmission and distribution interconnection planning. This requires methodological advances in load coincidence modeling for co-located facilities, spatial allocation of facility demand across distribution network nodes, and uncertainty quantification frameworks that are actionable for grid planners operating under regulatory planning standards. Second priority is the development of artificial intelligence workload energy forecasting approaches that treat AI compute demand as a distinct forecasting domain with its own driver variables, technology learning curves, and uncertainty characterization approaches, drawing on the growing literature on the energy characteristics of foundation model training and inference workloads (Patterson *et al.*, 2021; Luccioni *et al.*, 2023).

Third priority is developing methodologies for emerging economy contexts that can operate with limited facility-level operational telemetry, combining engineering bottom-up models with publicly available proxy data to produce policy-relevant forecasts in data-sparse environments. The sub-Saharan African context, where the Nnaji *et al.* (2019) and Ntuli *et al.* (2024) frameworks offer a starting point for distributed grid planning under concentrated load scenarios, is a particularly important regional focus given the combination of rapid hyperscale investment interest and significant pre-existing grid deficits. Fourth priority is the development of integrated frameworks for evaluating the combined grid impact of hyperscale energy demand and hyperscale renewable energy procurement, enabling sub-national energy planners to assess whether voluntary renewable energy commitments translate into actual local grid decarbonization benefits (Ewim *et al.*, 2023; Aniebonam *et al.*, 2025). Fifth priority is the development of standardized data reporting protocols for hyperscale operators that would enable external researchers and utility planners to develop and validate energy demand forecasting models without relying exclusively on voluntary and selectively disclosed operator data.

8.3 Physics-Informed Neural Networks for Hyperscale Load Forecasting

Physics-informed neural networks represent an emerging methodological frontier that combines the pattern recognition capabilities of deep learning with explicit physical constraints derived from thermodynamic relationships between information technology load, cooling system operation, and total facility energy consumption (Raissi, Perdikaris, & Karniadakis, 2019; Karniadakis *et al.*, 2021). By incorporating PUE models, cooling system thermodynamic constraints, and power delivery efficiency curves as differentiable constraints in the neural network training objective, physics-informed approaches can maintain physically plausible predictions even in operating regimes not well-represented in training data, addressing a key limitation of purely data-driven approaches for hyperscale facility forecasting. Several recent implementations have demonstrated that physics-informed constraints reduce prediction error on out-of-distribution test scenarios by 15 to 40 percent relative to unconstrained deep learning baselines while achieving comparable accuracy on in-distribution scenarios, a performance profile particularly valuable for hyperscale facilities undergoing hardware generation transitions or workload composition changes that shift the operating regime relative to the historical training data distribution.

The principal implementation challenge for physics-informed neural network approaches in hyperscale facility contexts is the partial observability of the physical system that generates the training data. Thermodynamic models of cooling system operation require accurate measurements of supply and return air temperatures, airflow rates, cooling tower performance parameters, and chiller coefficient of performance values that are not routinely logged at the temporal resolution required for machine learning model training in many operational hyperscale facilities (Patki, Bautista Gomez, & Bhatt, 2022). Cooling system instrumentation retrofits to generate sufficient training data for physics-informed model development represent a significant capital investment that must be justified relative to the forecasting accuracy improvements achievable. For new facility construction, incorporating comprehensive cooling system instrumentation from the outset at a cost fraction of total facility capital is a straightforward recommendation, but retrofitting existing facilities with thousands of servers and complex multi-zone cooling infrastructure is substantially more challenging.

8.4 International Policy Frameworks and Emerging Regulatory Dimensions

The sub-national energy policy implications of hyperscale energy demand growth are increasingly attracting attention from national and international regulatory bodies whose frameworks will shape the environment within which utility planners and state regulators must operate. The European Union's Ecodesign for Sustainable Products Regulation establishes mandatory energy efficiency requirements for data center operators with facilities above specified capacity thresholds, requiring reporting of PUE, water usage effectiveness, and renewable energy fraction metrics that provide a foundation for regulatory oversight of hyperscale energy consumption at the national and sub-national level. In the United States, the absence of comparable federal data center energy disclosure requirements creates a significant information asymmetry between hyperscale operators and the utility planners and state regulators responsible for ensuring grid adequacy, though several state legislatures including Virginia and Oregon have introduced or enacted disclosure requirements in response to the disproportionate concentration of hyperscale load in their service territories (Nnaji, Adgidzi, Dioha, Ewim, & Huan, 2019; Ntuli, Eloka-Eboka, Mwangi, Ewim, & Dioha, 2024).

8.5 Study Limitations

This systematic review was limited to literature published in academic journals, technical reports from major research organizations, and publicly available documentation from hyperscale operators, excluding proprietary internal analyses and confidential utility planning documents that likely contain the most operationally specific and validated forecasting methodologies. The review may be subject to publication bias in that facilities achieving unusually strong forecasting accuracy improvements are more likely to be written up and published than baseline or negative results. The synthesis of methodological families is necessarily simplified relative to the diversity of actual implementations: real-world forecasting systems often combine elements from multiple methodological families in proprietary hybrid architectures whose specific designs are not publicly disclosed. Rapidly evolving artificial intelligence workload patterns, including the emergence of generative AI inference as a dominant new load category after the review cutoff period, may have created methodological developments not captured in the review corpus. Future systematic reviews should incorporate structured outreach to utility planners and hyperscale operators to gather methodological insights from non-published practitioner experience.

9. CONCLUSION

This systematic review has synthesized the methodological literature on energy demand forecasting for hyperscale computing facilities and its sub-national energy policy implications, identifying significant fragmentation across five primary methodological families and a substantial gap between the analytical sophistication of individual forecasting approaches and the integrated, spatially explicit, uncertainty-quantified forecasting frameworks that sub-national energy policy requires. The review found that engineering bottom-up models offer the strongest physical interpretability and longest planning horizons but require data that are often unavailable to external researchers and utility planners. Econometric approaches are relatively accessible but structurally limited by the absence of adequate proxy variables for the software and business-model drivers of hyperscale demand growth. Machine learning approaches offer strong operational forecasting accuracy but limited generalizability across structural changes in facility operations and technology. Physics-informed hybrid approaches represent the most promising methodological frontier but require continued development and validation. Scenario-based planning frameworks complement quantitative forecasting methods by capturing structural uncertainty but do not provide the probabilistic error characterization that risk-informed planning requires.

The sub-national energy policy implications of hyperscale energy demand growth are severe and immediate in high-concentration markets such as Virginia, Oregon, Arizona, and Texas, and are emerging rapidly in global markets including Singapore, Ireland, the Netherlands, and emerging hyperscale destinations in Africa and Asia. The mismatch between the rate of hyperscale capacity expansion and the pace of utility planning and regulatory processes is a systemic challenge that better energy demand forecasting alone cannot resolve, but that better forecasting can substantially mitigate by giving utilities, grid operators, and regulators earlier and more credible signals of the grid reinforcement, generation capacity, and renewable energy integration that hyperscale demand growth requires. Advancing the methodological frontier identified in this review's priority research agenda is therefore an urgent practical necessity for energy systems that are increasingly shaped by the digital infrastructure underlying the modern economy.

Future research should focus on developing validated spatially explicit forecasting frameworks, advancing artificial intelligence workload energy modeling as a distinct domain, building capacity for data-sparse emerging economy contexts, and establishing standardized data disclosure practices that would enable the external validation of forecasting methodologies across the full range of hyperscale facility types, operating environments, and policy contexts that characterize this rapidly evolving infrastructure category.

Highlights

• The systematic review synthesizes methodological evidence on energy demand forecasting for hyperscale computing facilities and its sub-national energy policy implications across five forecasting methodological families

• Engineering bottom-up models offer the strongest physical interpretability and longest planning horizons but require data typically available only to facility operators, limiting external application by utility planners

• Physics-informed neural networks are identified as the most promising emerging methodological frontier for hyperscale load forecasting, combining deep learning accuracy with physical plausibility guarantees

• The translation of facility-level energy demand forecasts to distribution network level remains the most critical unresolved gap between forecasting methodology and sub-national planning practice

• Artificial intelligence workload energy demand is identified as a distinct forecasting domain requiring dedicated methodology development separate from general-purpose hyperscale compute forecasting

DECLARATIONS

Author Contributions

Conceptualization: S.O.A. and P.C.A.; Methodology: S.O.A.; Search and Screening: P.C.A. and S.I.I.; Data Extraction: P.C.A. and K.O.A.; Formal Analysis: S.O.A. and P.C.A.; Writing — Original Draft: S.O.A.; Writing — Review and Editing: P.C.A., S.I.I., and K.O.A.; Supervision: S.O.A.

FUNDING

The authors received no specific funding for this work. The research was conducted independently without financial support from any external funding body.

CONFLICTS OF INTEREST

The authors declare no conflicts of interest relevant to this research.

DATA AVAILABILITY STATEMENT

No primary datasets were generated or analyzed during the current study. All referenced sources are identified within the manuscript and are available from the respective publishers upon reasonable request.

ETHICAL APPROVAL

This systematic review followed established guidelines for evidence synthesis and did not involve collection of primary data from human or animal subjects. No institutional ethical review was required for secondary analysis of published literature.

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