

EZASSI SIGNALS

Your market, watched.

Name the competitor, technology or regulation that could change your plans. Ezassi Signals tells you what's shifting, how sure we are, and what to do about it — written up and ready to act on, not another feed to read.

2+

independent events behind every signal. One headline is a report, not a signal.

3

confidence bands — with the missing evidence named when a call sits below High.

6

signals from a single cycle on the data center power path. One is on the next page.

WHAT EVERY SIGNAL GIVES YOU

What we saw

The pattern, built from dated events you can check — not a single press release.

Why it matters

What it means for your products, customers and markets, written against your scope.

How sure we are

High, Medium or Low. And Inconclusive when the evidence doesn't support a call yet.

What to do

A recommended action, so the signal ends in a decision rather than a reading list.

POINT IT AT ANYTHING

Competitor

Where a rival is moving next

Startup

When a new entrant becomes real

Commercial

Whether a technology is taking hold

Research

Whether the science is advancing

Regulatory

What's changing, and when it bites

Not a tool you have to run. The work, done.

Patterns found, weighed and written up against your business — and re-tested every cycle, so a call that stops holding gets re-scored instead of quietly dropped.

The racks are moving to 800 VDC. The safety standard for it doesn't exist yet.

HIGH CONFIDENCE

Short-term (3–12 months)

Regulatory & Policy

Status: Review

WHERE THE PUBLISHED STANDARDS STOP, AND WHERE THE RACKS RUN

where the new racks run →

UL/IEC 62368-1 and UL 1801 cover to 600 V

NO PUBLISHED METHOD

600 V

800 V

NFPA 70E & IEEE 1584

written for AC; they don't capture converter-limited 800 VDC fault behaviour

NFPA research project

still developing a preliminary DC arc-flash framework as of February 2026

First enforceable method

whoever publishes it — NFPA, UL or IEC — decides which protection devices can be installed

How sure: High, unusually. The gap is positively documented by four independent sources rather than inferred from silence. Status Review because the rulemaking is in research and could move quickly.

WHAT WE SAW

Schneider's August 2026 post and a separate safety brief both state that no industry-wide standard covers work on converter-fed 800 VDC. NFPA's own project page confirms its DC arc-flash model is still preliminary.

WHY IT MATTERS

Certified installation of solid-state breakers and native DC protection is an open question until someone closes the gap. Whoever publishes the first enforceable method sets which devices are installable — and which suppliers hold the socket.

WHAT TO DO

Track the NFPA research project and the UL and IEC work directly, and watch for the first listed 800 VDC protection device. That listing, not a press release, is when the socket closes.

Sources: [Schneider Electric — arc-flash testing and 800 VDC](#) · [Schneider Electric — 800 VDC safety](#) · [NFPA Fire Protection Research Foundation](#) · [SAVRN — 800 VDC power guide](#)

This is 1 of 6 signals from one cycle.

The other five cover the OCP specification milestones with no supplier qualification behind them, NVIDIA's first production 800 VDC rack keeping the AC facility intact, multi-year transformer and switchgear lead times, the interconnection queue decisions, and the reference designs proliferating across vendors.

[See all 6 signals →](#)

Put a watch on your question.

See all nine samples and tell us your question: ezassi.com/ezassi-signals-sample-library

info@ezassi.com · ezassi.com