



# Data Center Operating and Investment Perspectives

Moderated by Tony Rossabi, CEO of Recovery Point Systems

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# Data Center Players: Market Landscape

Wholesale

Enterprise

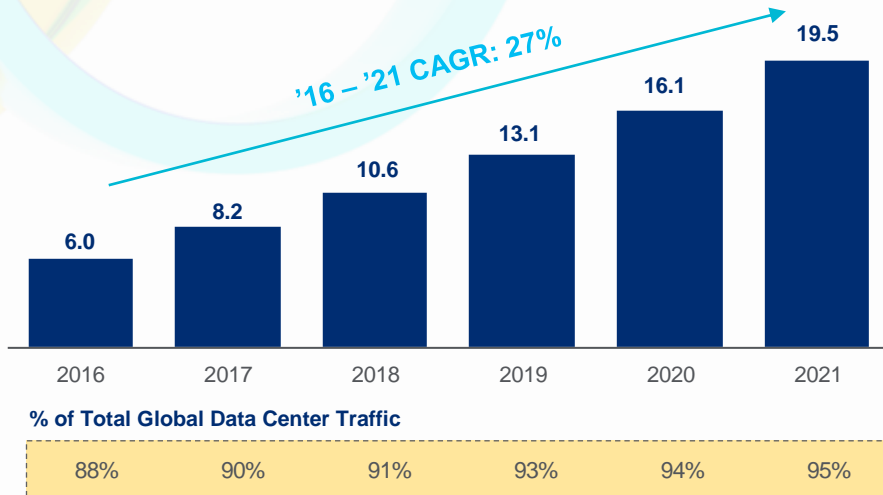


Edge



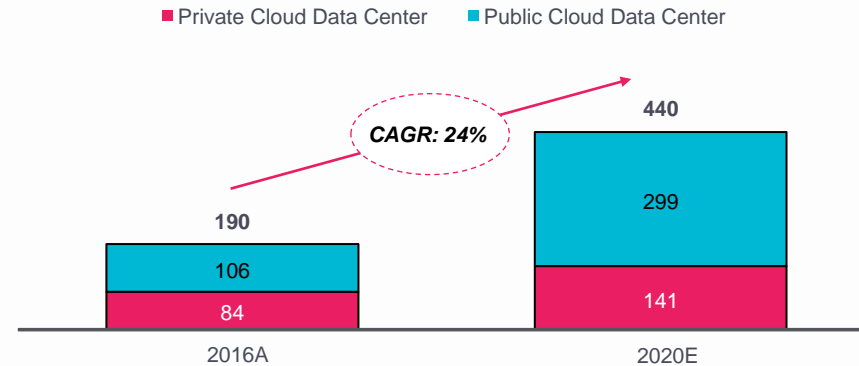
# Data Center Trends: Cloud Growth

Cloud Data Center Traffic<sup>(1)</sup> Explodes...  
(IP Traffic, ZB / Year)



...As Workloads Rapidly Grow Across Cloud Platforms  
(Global Installed Workloads, in millions)

- Rapid workload **growth across public and private cloud** environments
- **Increasing scope and scale** of **diverse** cloud-based offerings
- End users **seek a custom solution** to fit their **individual needs**



Source: Intel, Voice of the Enterprise, Gartner, Private Cloud from IDC, Cisco Global Cloud Index and Bond Capital Internet Trends

Global Internet Data Centers Market to Reach \$143.4 Billion by 2027

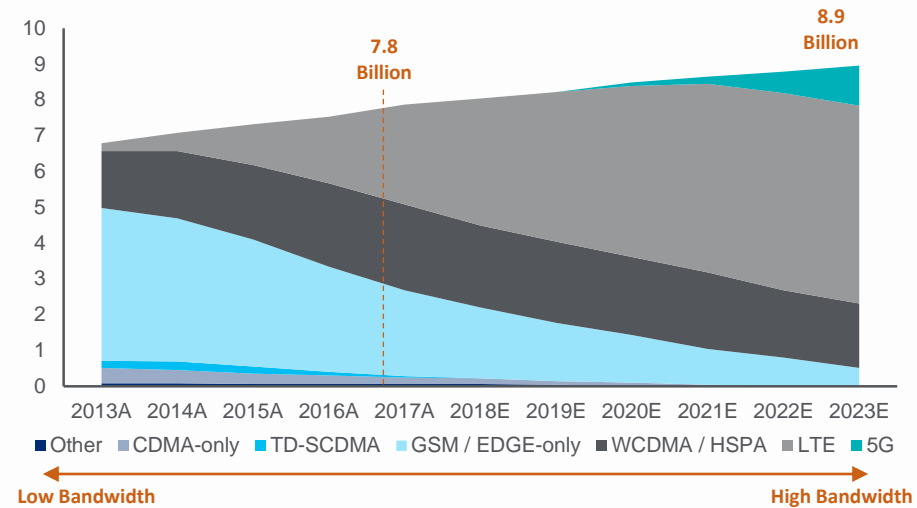
# Data Center Trends: Growth of 5G

## Key Drivers

- Mobile Traffic is Rapidly Growing and Densifying
- Automation & IoT Drives Need for Bandwidth & Latency
- 5G Capturing Increasing Share of Growth
- Massive Investment to Support & Build-Out 5G

## 5G Capturing Increasing Share of Growth

*(Mobile Subscriptions by Technology, in Billions)*





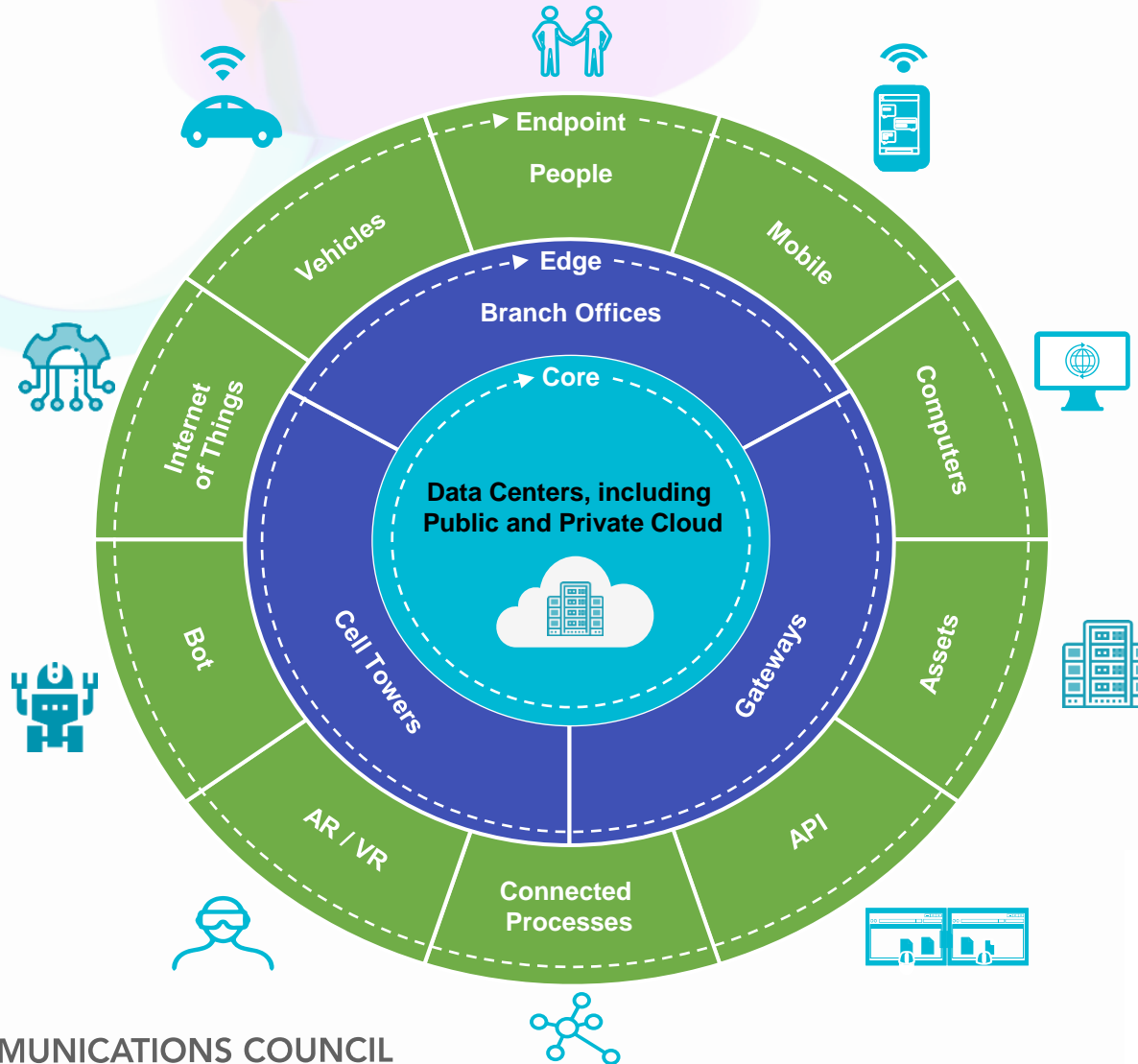
# Data Center Investments

- The traditional investment model is changing
- Greenfield expansions into new markets (EMEA, APAC)
- Creative financing (securitizations, capital recycling / “YieldCos”, etc.
- Significant new capital looking to enter the digital infrastructure space highlighted by premium valuations and formations of new dedicated funds Joint ventures becoming more prevalent
- Increased M&A Activity: ex. Consolidation in Europe (Digiplex and Green Mountain)

Source: Citi Banking Data Center Review



# Data Centers at the Core of a Tectonic Shift



*“Data is now fundamental to how people work, and the most successful companies have intelligently integrated it into everyone’s daily workflow...”*

***Data is the new application”***

*– Frank Bien, CEO & President, Looker*

# Thank you!

