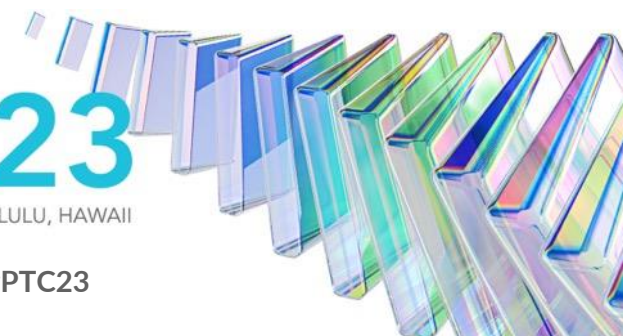




# PROCURING CAPACITY FOR LONG-TERM GROWTH

ERIC JACOBS, CHIEF REVENUE OFFICER  
ALIGNED DATA CENTERS

12:15-12:27

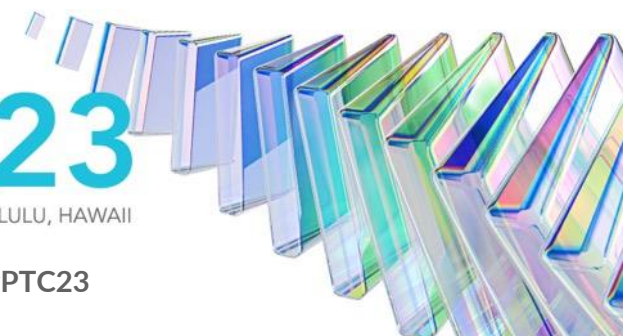


# Challenges for Long-term Customer Scale

- Land scarcity
- Power supply shortages
- Power transmission challenges
- Supply chain deficiencies
- Global permitting issues
- Rising density & demand
- Pandemic ripple effects
- M&A & consolidation
- Drying capital inflows, rising costs of debt

## Customer Overview:

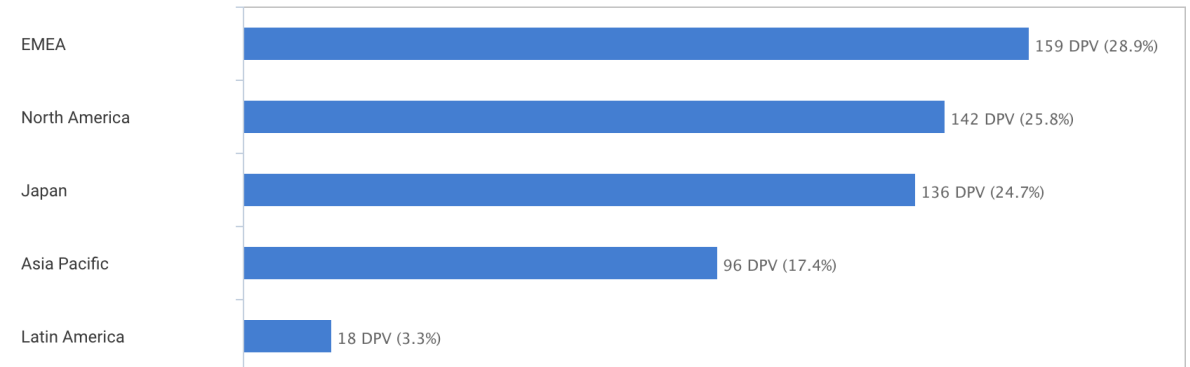
- Hyperscale
- Large enterprise



# Data Center Market Overview

- Hyperscale / CSPs continue to drive sector growth, with more than 22% of total market value CAGR predicted for '20-'25 (RBC Capital)
- Cloud availability regions continue to expand and spur datacenter growth, led by MSFT
- Enterprise and hyperscale buying strategies are changing (primarily driven by scarcities across land, power and available capacity)
- Strong pre-leasing %
- Influx of build-to-suit projects vs hyperscale self-builds
- Rampant M&A & consolidation
- Drying capital inflows, rising costs of debt limiting legacy data center scale
- Rising densities requiring better w/sq. ft. in the data hall, and larger density yields across the build site
- Lack of talent to operate facilities

## Enterprise Region



*Gartner Forecast: Data Centers, Worldwide, 2018-2025*

# STRATEGIES FOR EFFECTIVE SCALE

- Invest in (the right) people & partners
- Design for scale
- Power & connectivity-first land acquisition strategy
- Solving for scale & future growth; 3-5 year plan vs 1-2
- Trusted partnerships & problem-solving w/customers vs transactions

