



Unlocking Success in Middle East Digital Infrastructure: Insights from a Regional Expert

11Stream - the Leading Regional Boutique Consulting
Specialized with Digital Infrastructure

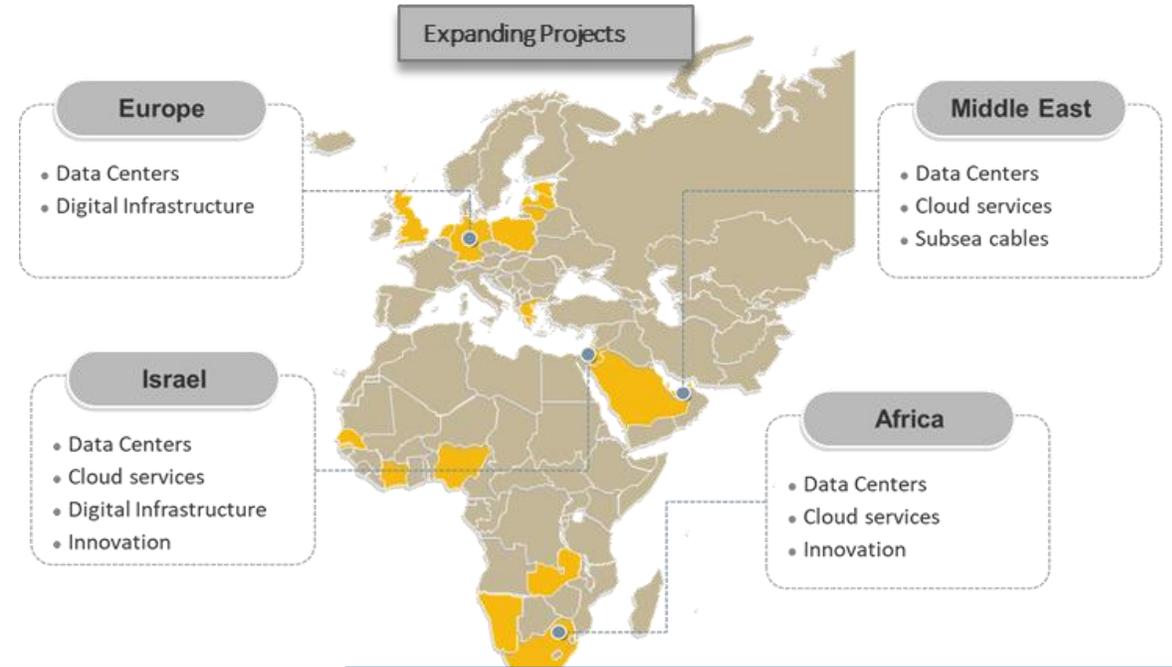
January 2025

11Stream - Background About Us



Founded in 2015 by Yonit Goldberg and Oren Nauman, over 50 years of combined experience in the fields of digital infrastructure, telecommunications, cloud, data centers, submarine cables and cyber security

Business development, market analysis, market entry, site selection, due diligence and strategic partnerships



Research & Media Credentials

“The Lady Who Signed Huge Deals in the Field of Network Infrastructure”

Globes Top 50 Most Influential Women 2022 and 2023

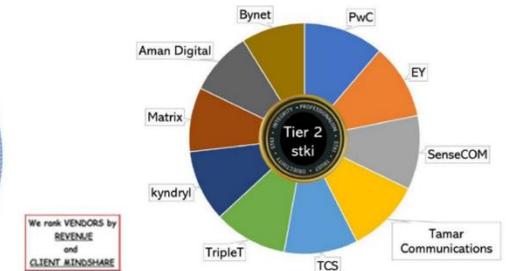
“Tier 1 IT Infrastructure & Cloud Program Management & Consulting Firm”

STKI/Gartner 2022 and 2023

“Telecon infrastructure Most Influencing Firm in the Middle East”

TheMarker financial Magazine

IT Infrastructure & Cloud Consulting

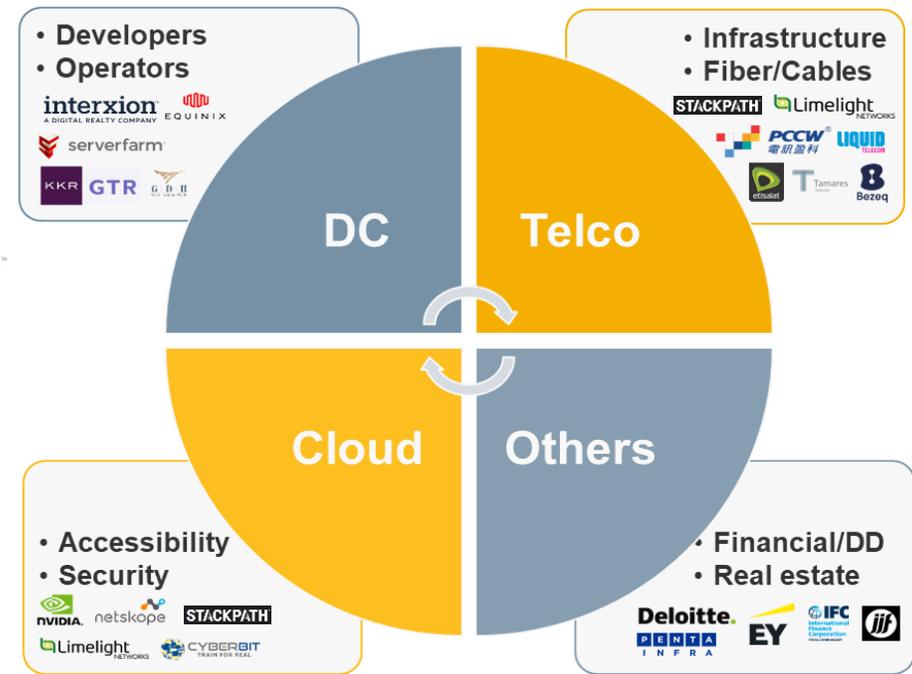


We rank VENDORS by REVENUE and CLIENT SHARE

11Stream - Europe, Middle East & Africa Domain Experts



Recognized as the most influential firm in the region - Dozen of active clients, wide range of public and private companies including investment funds, financial institutes and PEs from the US, Europe and the ME



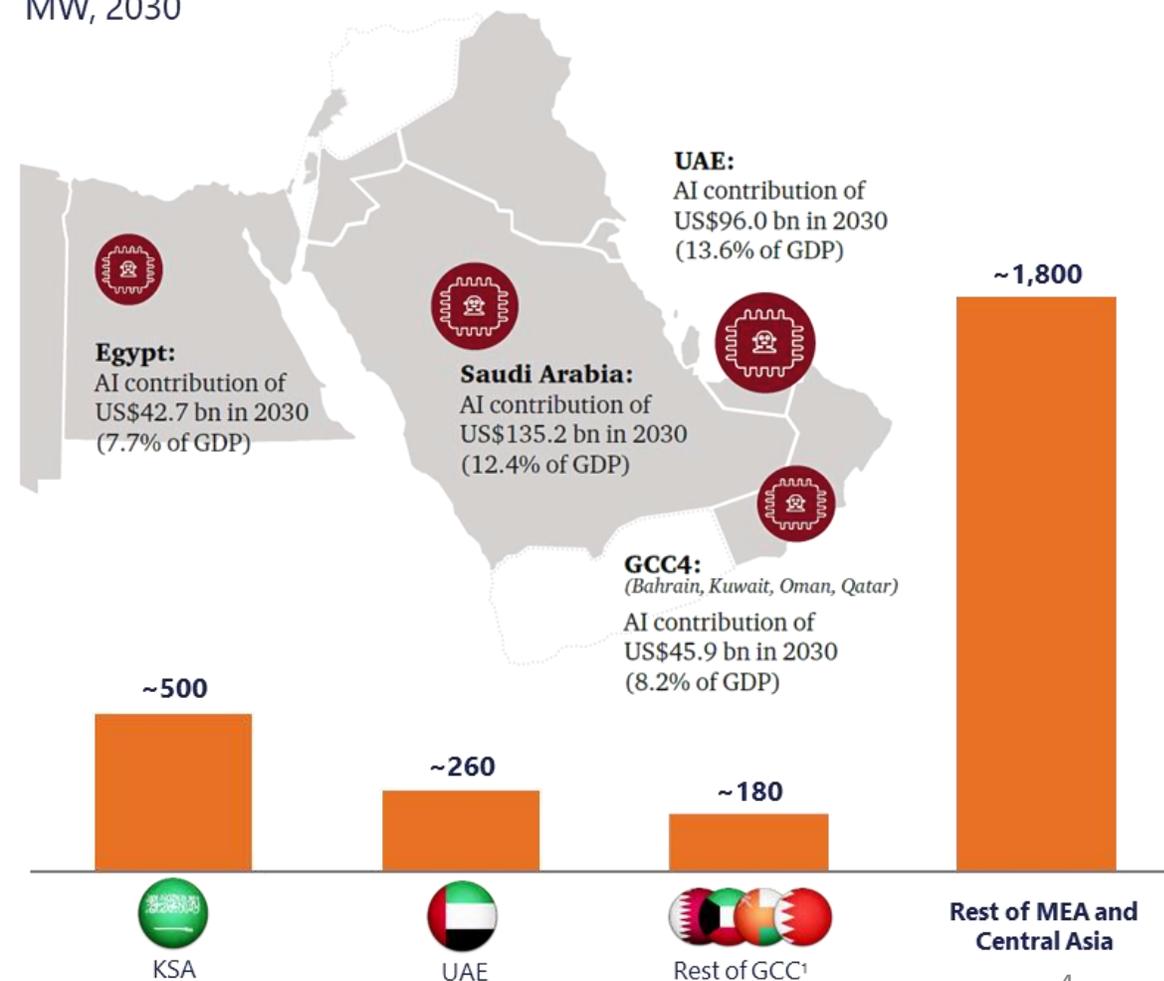
Program management, Strategy, Business Development, Expansion, Go to Market, Site Selection, Financing DD, Partnerships and M&As, totaling over 15 Billion USD

Wave of Supercomputing & AI Changing the World and It Is Reaching Fast The ME

- 🌊 Middle East's significant AI economic contribution
- 🌊 Supercomputing demand uplift in Middle East
- 🌊 AI economic impact highlighted regionally
- 🌊 Key contributions from GCC countries
- 🌊 Focus on **UAE**, **Saudi Arabia** & Egypt
- 🌊 **Israel**: Established powerhouse in AI - Surpassing total GCC demand combined. Driven by robust tech ecosystem

Middle East and Central Asia GenAI demand uplift

MW, 2030



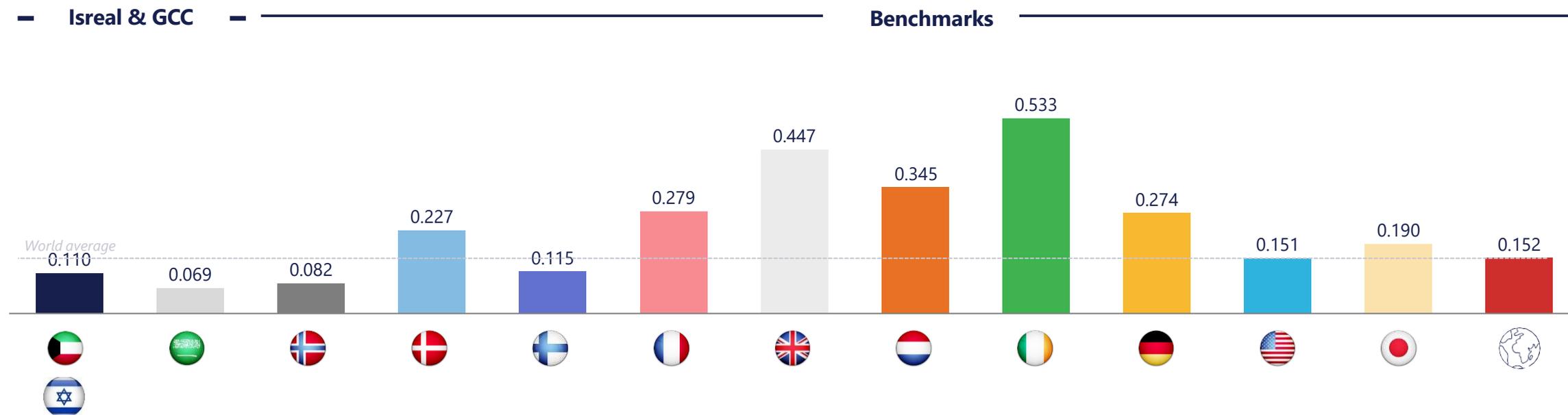
Source: PWC "Impact of AI in the Middle East", Omdia, NVIDIA, broker reports, 11Stream market participant interviews, Altman Solon

Power pricing in UAE & Israel is comparatively lower than world average, but higher than Saudi Arabian



Average electricity rates for businesses

\$ / kWh, latest data available – September 2023



- Average electricity prices for businesses in the Israel, UAE and Saudi Arabia **are lower compared to the benchmarks from more developed, FLAP-D countries** and the World average, mainly due to large natural resources in those countries which allow for keeping energy prices low
- **Lower energy costs** and **special benefits** regarding tax and business operations facilitations attract Hyperscalers and other players to enter and develop Data Centres in key target markets. **PUE should be factored in as GCC PUE in the range of 1.5-1.8 is higher than Nordic peers**

Source: Company information, GlobalPetrolPrices, Altman Solon

Do's and Don'ts in the Middle East

Do's

- ✔ Focus on collaboration: Partner with stakeholders effectively.
- ✔ Understand local needs: Align with regional priorities.
- ✔ Leverage expertise: Use insights from local experts.
- ✔ Adapt culturally: Respect local customs and practices.
- ✔ Stay compliant: Follow all regulations and laws.
- ✔ Foster transparency: Build ethical government relations.

Don'ts

- ✘ Ignore nuances: Avoid overlooking cultural differences.
- ✘ Break regulations: Don't neglect legal requirements.
- ✘ Simplify challenges: Address regional complexities fully.
- ✘ Apply one-size-fits-all: Tailor solutions to each region.
- ✘ Engage in bribery: Avoid all unethical practices.
- ✘ Rely on informal ties: Build documented relationships.

11Stream – Contact Details and Disclaimer



Disclaimer: The information in this Presentation reflects prevailing conditions and our views as of this date, which are accordingly subject to change. In preparing this Presentation, we have relied upon and assumed, without independent verification, the accuracy and completeness of all information known to us, available from public sources or otherwise reviewed by us

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