Tapping into the AI-fueled surge in data center capacity demand

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22nd August 2025

NOKIA

Me at the zoo

First video on

YouTube

2005

April 23

Me at the zoo

First video on YouTube

2005
April 23

NETFLIX

2007

Video era

Me at the zoo

First video on YouTube

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NETFLIX

2007

Video era

2022
November

ChatGPT

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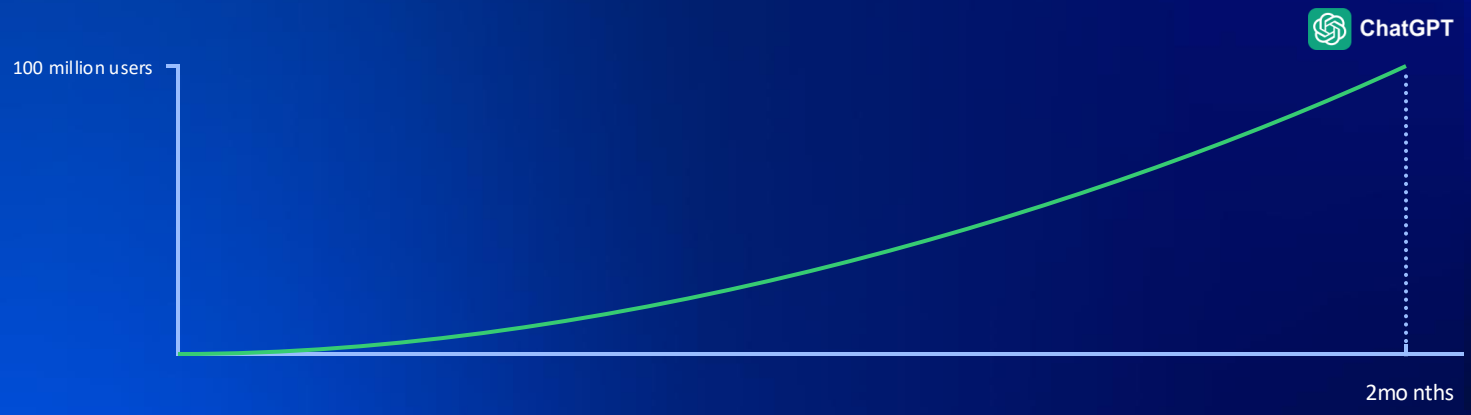
prime video

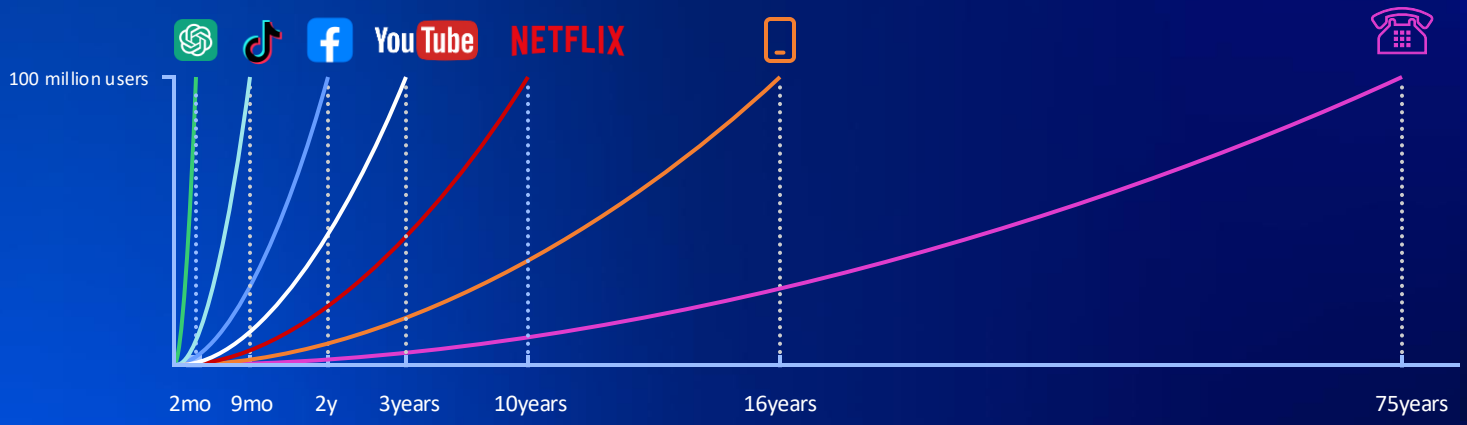
ChatGPT

2022
November

AI era

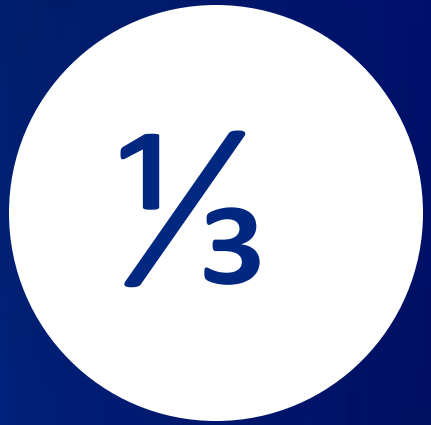


Time to 100 million users



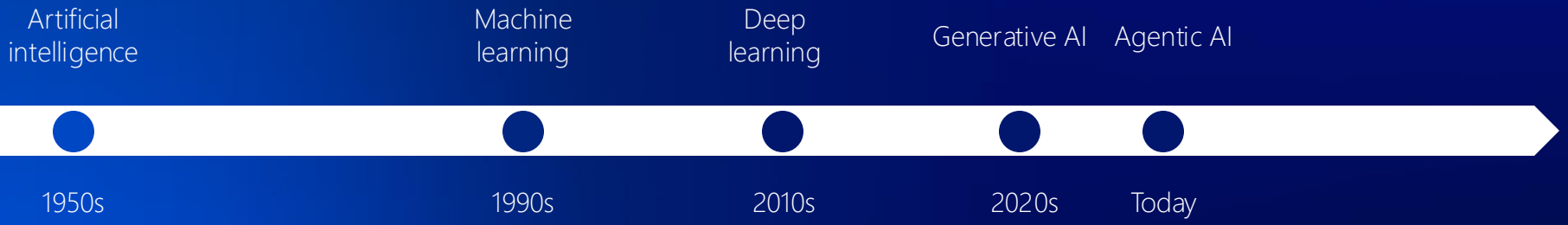
Time to 100 million users

of organizations are already implementing Gen AI

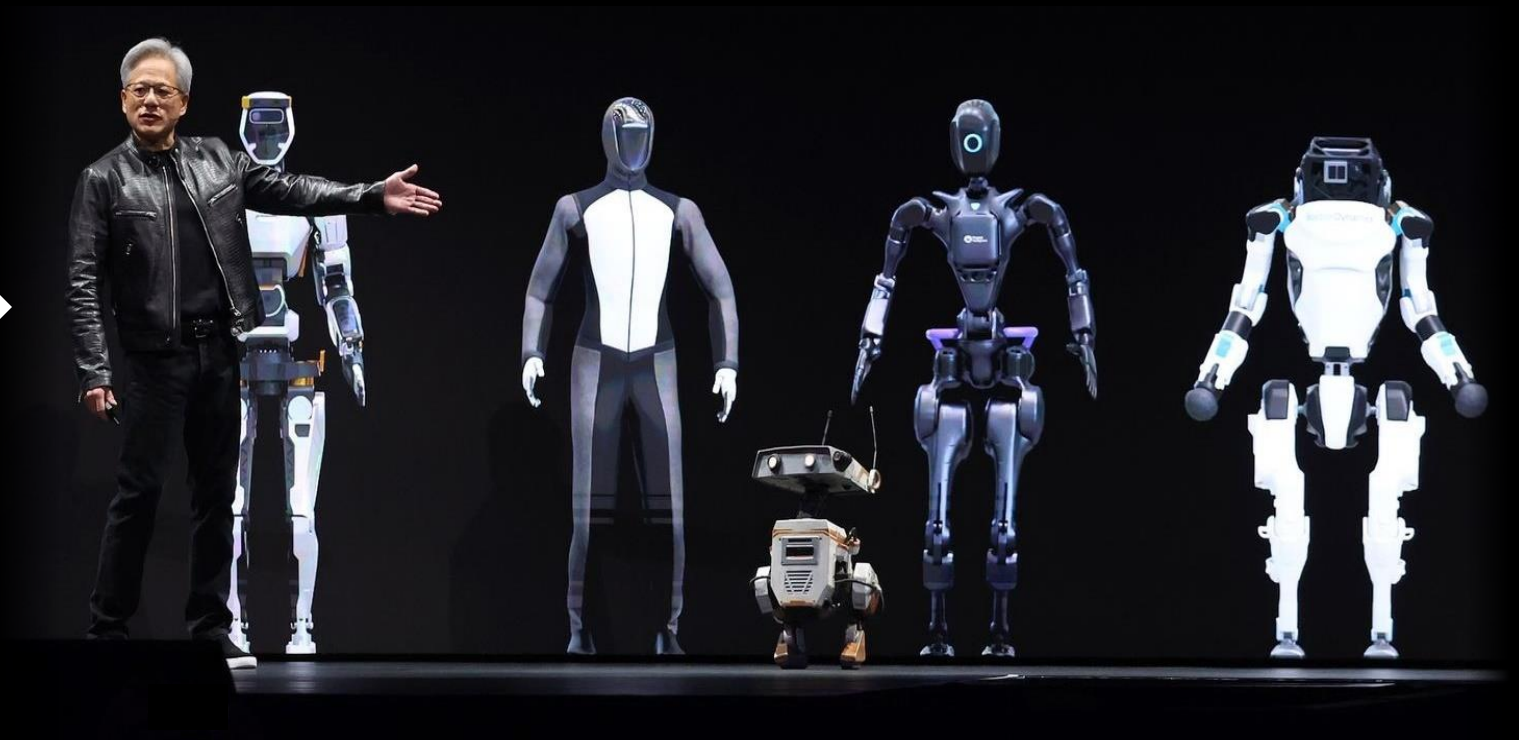


of all global venture funding is going to companies in AI-related fields

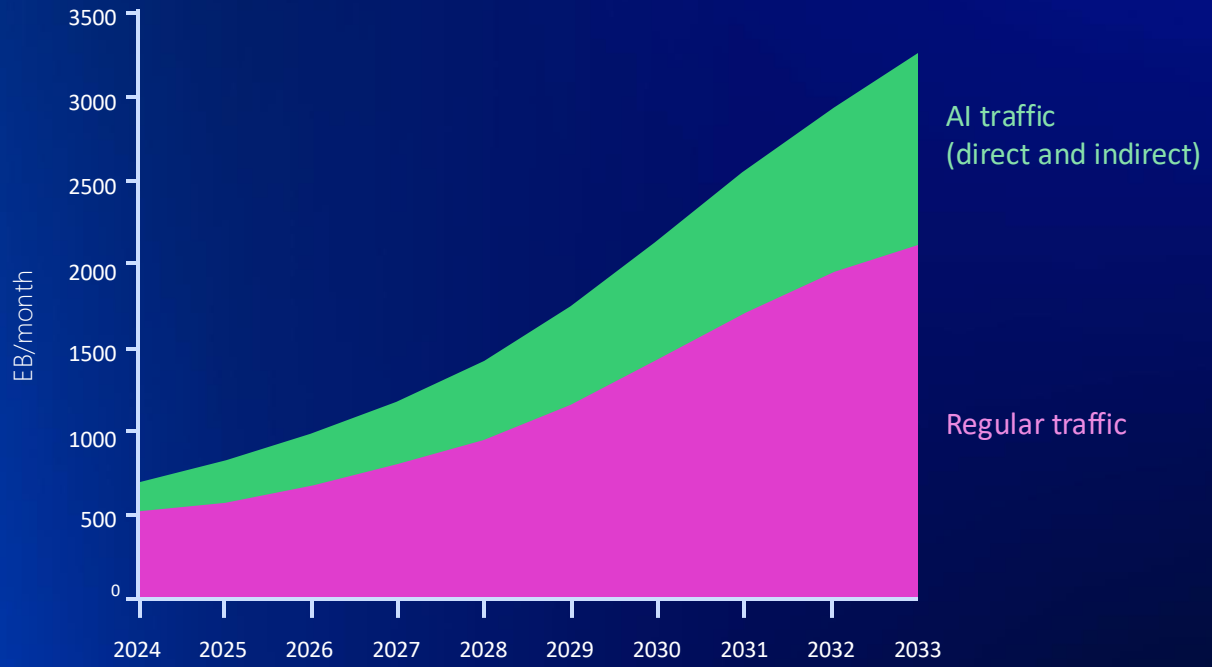
investment planned by cloud hyperscalers in data center in 2025



Physical AI



Global WAN AI traffic projections



The network-cloud continuum

AI factory

AI training

The network-cloud continuum

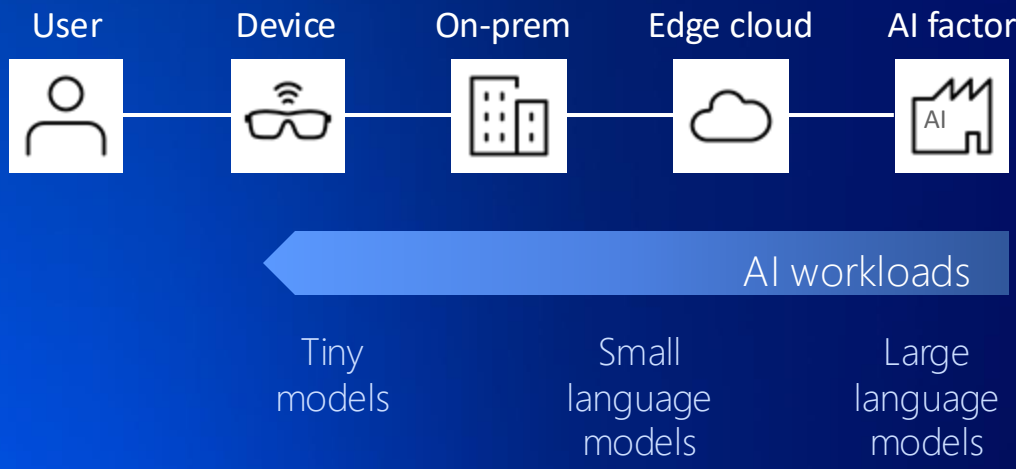
AI inferencing

Consumption of AI content

60-70%

of AI workloads will shift to real-time inference by 2030

The network-cloud continuum

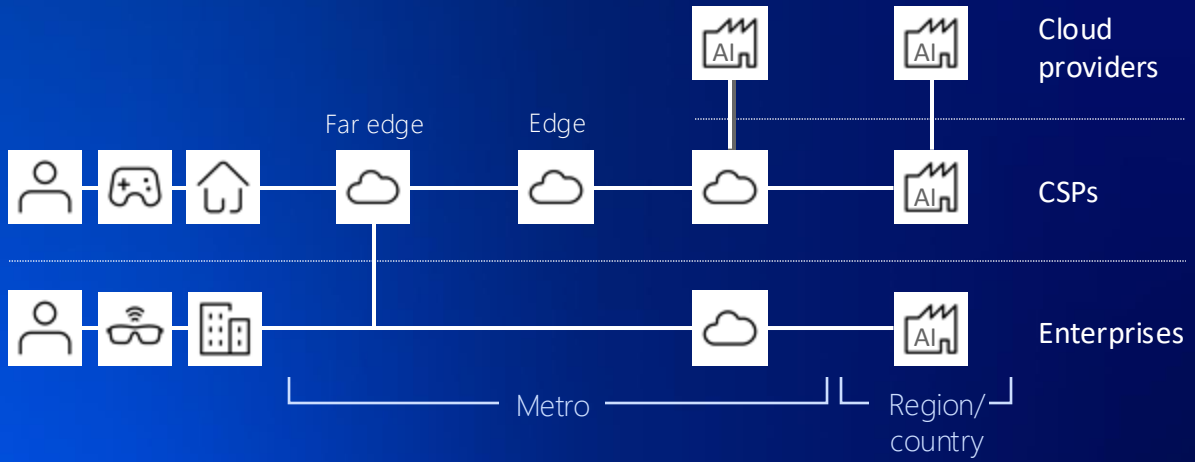


AI inferencing

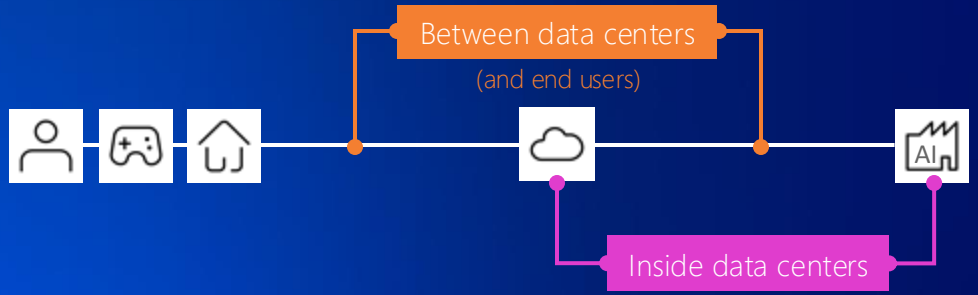
Constraints

- Latency
- Data sovereignty
- Security/Privacy
- Bandwidth efficiency
- Cost of extracting data
- Power availability
- …

The network-cloud continuum



The network-cloud continuum



The critical role of the network

- ✓Speed and latency
- ✓Capacity and scalability
- ✓Resiliency and reliability
- ✓Security and privacy
- ✓Responsiveness to changes
- ✓Cost-efficiency

The network is critical but the opportunity does not stop there…

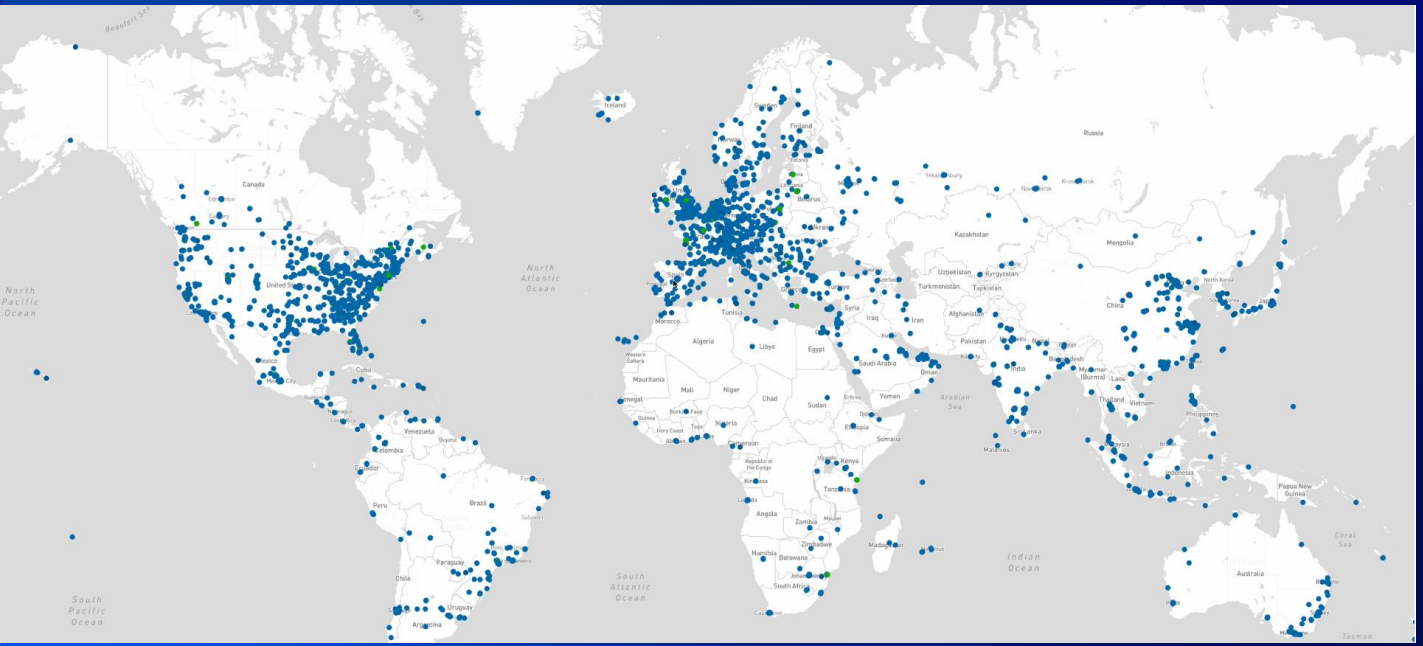
…there is more

What about these data centers?

$2T Cloud revenues by 2030

22 % CAGR

Source: Goldman Sachs Research



9800 data centers

500 new projects

Key drivers of the cloud evolution

Factories

Hyperscalers

$315B

in 2025

Sovereignty

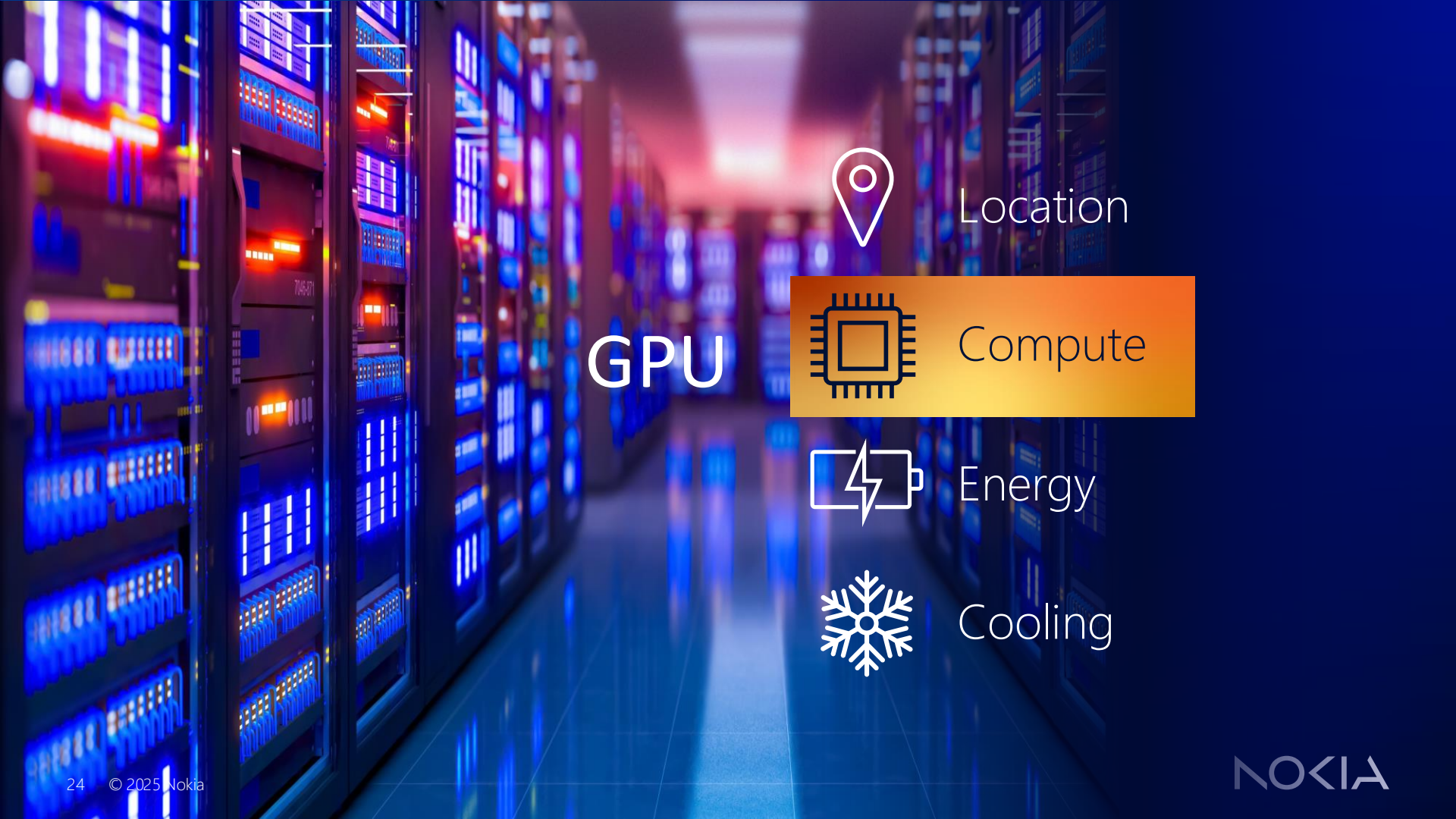
Regulation

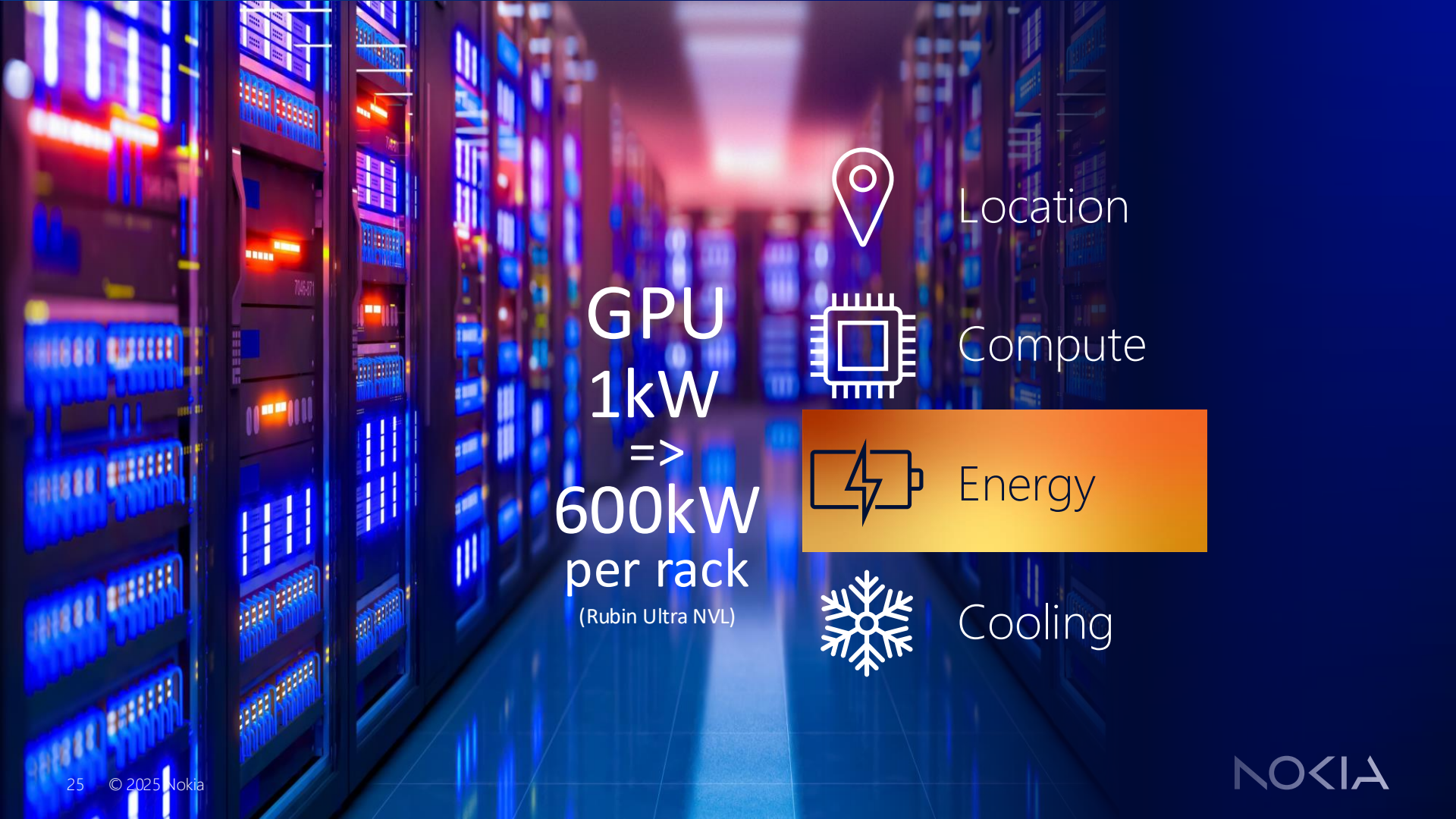
Geopolitics

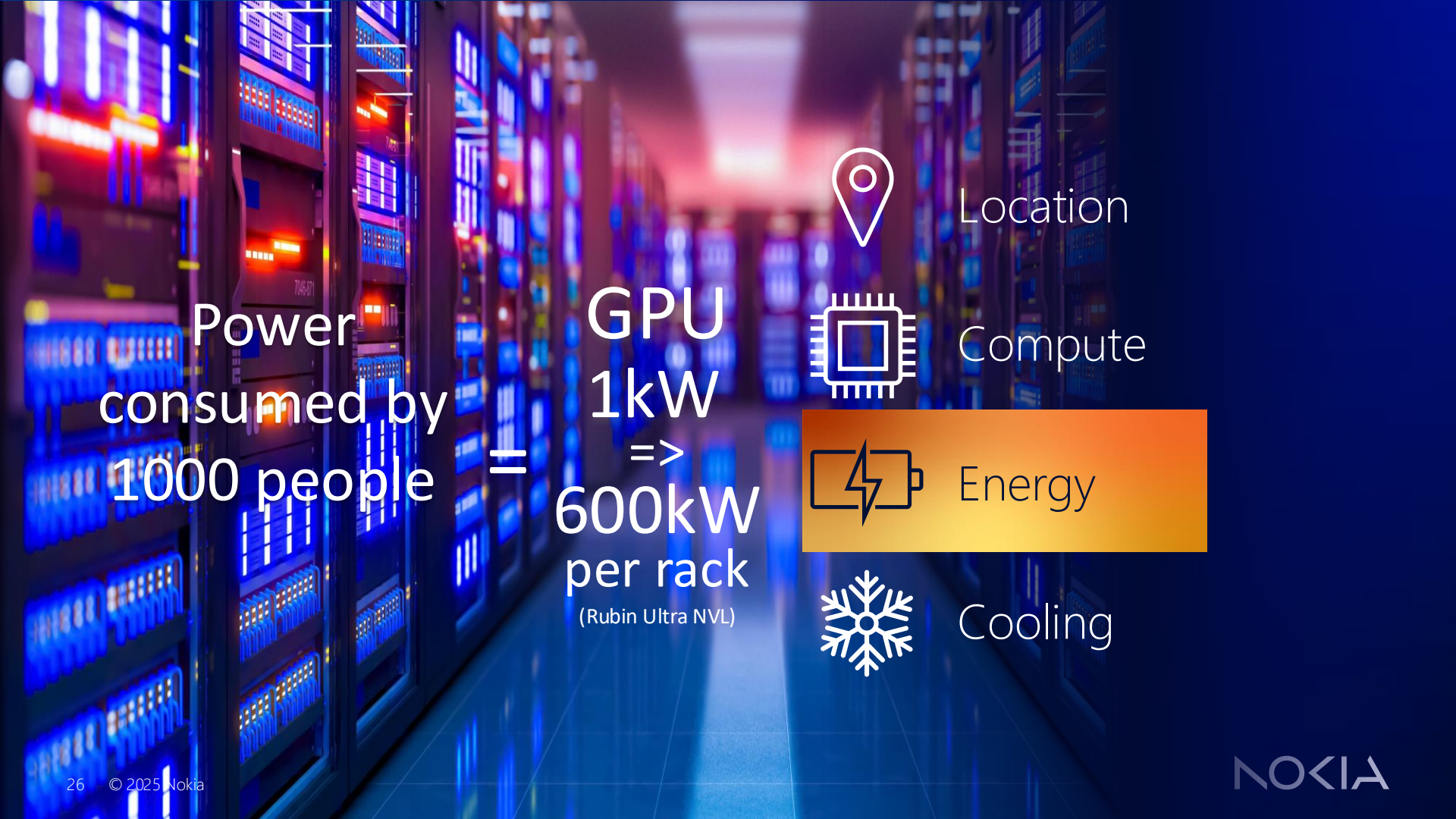
Cyber threats

Data center hot topics

- Location
- Compute
- Energy
- Cooling




GPU
1kW
=>
600kW
per rack
(Rubin Ultra NVL)
Location
Compute
Energy
Cooling


Power consumed by 1000 people
=
GPU 1kW
=>
600kW
per rack
(Rubin Ultra NVL)
Location
Compute
Energy
Cooling

The AI super-cycle …. opportunities abound for communications providers, infrastructure providers, utility providers, facility providers and governments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