Digital Infra Leaders Summit

EUROPE 2025 EXECUTIVE SUMMARY

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Exclusive invitation-only executive-level workshops held alongside major events, the Digital Infra Leaders Summits have become a highlight on the calendar of digital infra CEOs and industry VIPs.

Held in Cannes in June, alongside Datacloud Global Congress, the 2025 European Digital Infra Leaders Summit brought together 50 of the most influential stakeholders in the region's data centre industry to tackle the main challenges the sector faces.

Having each completed a short, anonymised survey ahead of the workshops, analysis of the results was used to help structure and stimulate debate and discussion during the session.

In this Executive Summary, we share with you the main take homes from the session as well as the outcomes of the trend sentiment analysis

Key discussion areas included:

- Evolving investor sentiment in digital infrastructure asset classes
- Key industry growth drivers and headwinds
- Strategic priorities for the upcoming year
- Priorities for capex allocation
- Business model evolution
- M&A expectations and drivers
- Collaborative activities that should be considered
- Digital infrastructure for AI
- Ensuring access to affordable, sustainable power

Interested in participating in future workshops?

Contact Digital Infra Leaders' Summit Director, Laura Graves to enquire about eligibility and availability.

E: lgraves@techoraco.com

Who participated?

Digital Infra Leaders Summit

- **Petter Tommeraas**, Managing Director Data Center Services, Aker Horizons
- **Nicolas Ott**, Senior Operating Partner, Ardian
- **Rohini Pahwa**, Partner, Arjun Digital Infrastructure
- **Tesh Durvasula**, CEO, AtlasEdge
- **Josiah Sullivan**, Global Leader, Strategic Customer Engagements, AWS
- **Matteo Bruno**, Principal, Energy Strategy, AWS
- **Robert Hartog**, Managing Partner, Blue Owl
- **Eric Schwartz**, CEO, CyrusOne
- **Olivier Micheli**, CEO, Data4
- **Colin McLean**, CRO, Digital Realty
- **Randy Brouckman**, CEO, EdgeConneX
- **Alessandro Lombardini**, CEO, Elea
- **Justin Dustzadeh**, CTO, Equinix
- **Leanne Starace**, SVP, Equinix
- **Diarmid Massey**, CEO, Data Centre, ESR
- **Michael Winterson**, Secretary General, EUDCA
- **Jim Fagan**, CEO, Exa Infrastructure
- **Anthea Lea**, CEO, Frasers Logistics & Commercial Trust
- **Audi Pous**, Senior Managing Director, FTI Delta
- **Matt Barker**, MD & Head of Data Infrastructure, GI Partners
- **Louis Charlton**, CEO, Global Commissioning
- **Joe Kava**, VP Data Centres, Google
- **Chris Stephens**, Field CTO, Groq
- **Carl Roberts**, Partner, Hadaara Consulting
- **Michael Pothitos**, Principal, HIG Capital Digital Infrastructure

- **Andrew Crouch**, Managing Director, I Squared
- **Gary Aitkenhead**, EVP & GM, Iron Mountain
- **Doug Loewe,** CEO, Kao Data
- **Waldemar Szlezak**, Partner & Global Head of Infrastructure, KKR
- **Amar Khan**, Head of Network Site Investments, Meta
- **Will Smales**, Partner and Chief Investment Officer, Morrison
- **Amber Caramella**, CRO, Netrality
- **Doug Adams**, CEO & President, NTT Global Data Centers
- **Dan Madrigal**, VP, Oracle Cloud AI Sourcing
- **Chris Gandolfo**, EVP & General Manager, Oracle
- **Maxime Anne-Archard**, VP Digital Infrastructure Development, Orange
- **Nicholas Laag**, CEO, Prime Data Centers
- **Dame Dawn Childs**, CEO, Pure Data Centers
- **Marc Garner**, Global Segment President, Cloud & Services Providers, Schneider Electric
- **Susanna Kass**, Energy Fellow, Stanford University & Senior Advisor, Sidewalk Infrastructure Partners
- **Todd Zabelle**, CEO, SPS
- **Richard Bienfait**, CFO, STACK EMEA
- **Eduardo Sodero**, CEO, Takoda Data Centers
- **Dominic Ward**, CEO, Verne Global
- **Neil Cresswell**, CEO, Virtus Data Centres
- **David Mitchell**, CEO, XYZ Reality
- **Colman Deegan**, CEO, Zayo Europe
- **Frédéric Schepens**, NED

The summit was attended by 50 CXO and leaders from across the industry

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About the sponsors

Digital Infra Leaders Summit

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Global Commissioning is a specialised consultancy delivering world-class Commissioning Agent, Management, MEP Validation, and Specialist Electrical Services to the global data centre industry. We are experts in commissioning and optimising Hyperscale and COLO/IBX data centres, with extensive experience in process facilities, HV commissioning, and mission-critical infrastructure. Website - https://www.global-cxm.com/

GreenScale is a sustainable data centre platform supporting the advanced digital infrastructure of hyperscale, AI and cloud customers. GreenScale is committed to providing a scalable and sustainable data centre platform that will not only serve advanced digital infrastructure clients but also positively contribute to the energy infrastructure and local communities in which it operates. Website - https://greenscaledc.com/

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Digital Infra Leaders meetings are held in accordance with anti-trust law and participants are asked to comply with the relevant antitrust guidelines

Antitrust prohibits :

(i) Agreements, be they written or implicit, between competitors which may negatively impact customers or competitors

(ii) Sharing of confidential information

Digital Infra Leaders meetings participants must abide by the following

Do clearly identify the positive purpose of each discussion or proposed activity

Do consult with a legal professional in any area where you are unsure

Do not enter into agreements that may restrict other parties' actions or create barriers to market entry

Do not share information on pricing, business plans, or any other confidential or proprietary matters

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Five things we learned

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1. **Investment is shifting toward inference-driven AI infrastructure**, with 90% of AI investment expected to focus on inference within 3-5 years, requiring 3-10GW of power for every 1GW of training and driving demand for distributed edge nodes, particularly in Europe where training has lagged.

2. **Power availability is a critical bottleneck for AI data centers**, with affordable power scarce, nuclear efficiency low at 35%, and speculative DC projects inflating grid demands, necessitating collaboration with grids and innovative solutions like off-grid models and AI-driven grid virtualization.

3. **AI network topology is decentralizing**, evolving like the internet with inference nodes needed in 75 European cities to meet 12ms latency requirements, alongside growing edge DC sizes (from 2MW to 4MW) and rising fibre connectivity concerns.

4. **Regional dynamics shape AI DC deployment**, with the US leading in optimism and execution, Asia driven by population and latency needs, and Europe focusing on edge and enterprise opportunities despite losing ground in large-scale training.

5. **Speculative builds and rapid construction are transforming DC investment**, as seen in India’s 12-month DC build times and oil/gas companies buying pipeline-adjacent land, though debates persist on building ahead of demand versus securing anchor tenants first.

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Agenda

Digital Infra Leaders Summit

01

Scene Setting: Industry Economics and Key Trends

02

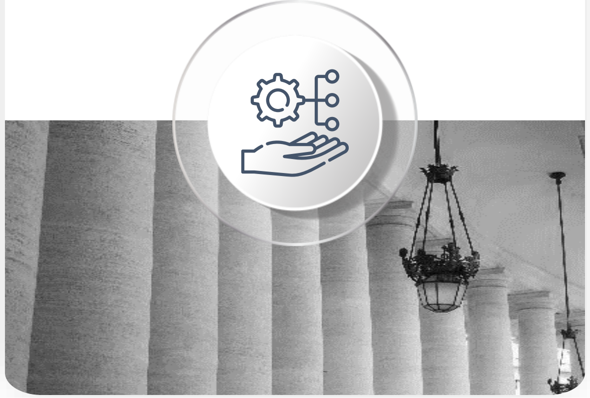
Deep Dive 1: Digital Infra for AI

03

Deep Dive 2: Power

04

Wrap-Up and Actions




Our agenda today
Digital Infra Leaders Summit
01
Scene Setting: Industry Economics and Key Trends
02
Deep Dive 1: Digital Infra for AI
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Wrap-Up and Actions

Questions to stimulate discussion

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01 What key trends are you following to shape the future of your business?

02 What is the greatest risk to digital infrastructure development?

03 What actions can be taken to mitigate this risk?

Source: FTI Delta analysis

A quick recap of what we spoke about in 2024

NON-EXHAUSTIVE

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TOP 10 TAKEAWAYS FROM 2024

01 Slight decline in EU digital infrastructure optimism

02 Data centres remain the most attractive asset class

03 AI and cloud are key growth drivers

04 DC WS[1] colocation and land deals attract most capital

05 Telcos prioritise ops[2] and CX[3] as key enablers of AI

06 Strong investor confidence in EU digital infrastructure

07 Deal activity led by fibre and DC transactions

08 M&A driven by consolidation and financial restructuring

09 Subsea fibre investment rising; EU outlook cautious

10 Energy access and green transition are top priorities

Notes: (1) Wholesale, (2) Operations, (3) Customer experience; Sources: DIL Europe 2024, FTI Delta analysis

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Optimism, whilst still high, has slightly decreased since last year

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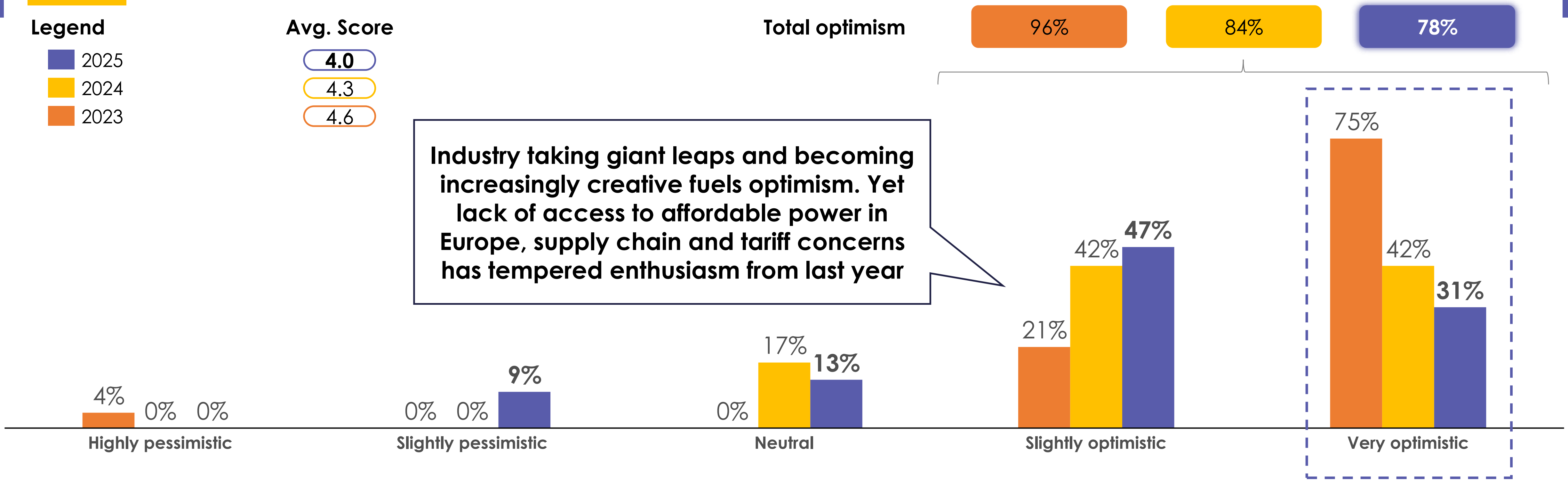
How optimistic are you on the outlook for the digital infrastructure sector in Europe?



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Optimism ranks among the lowest across regions

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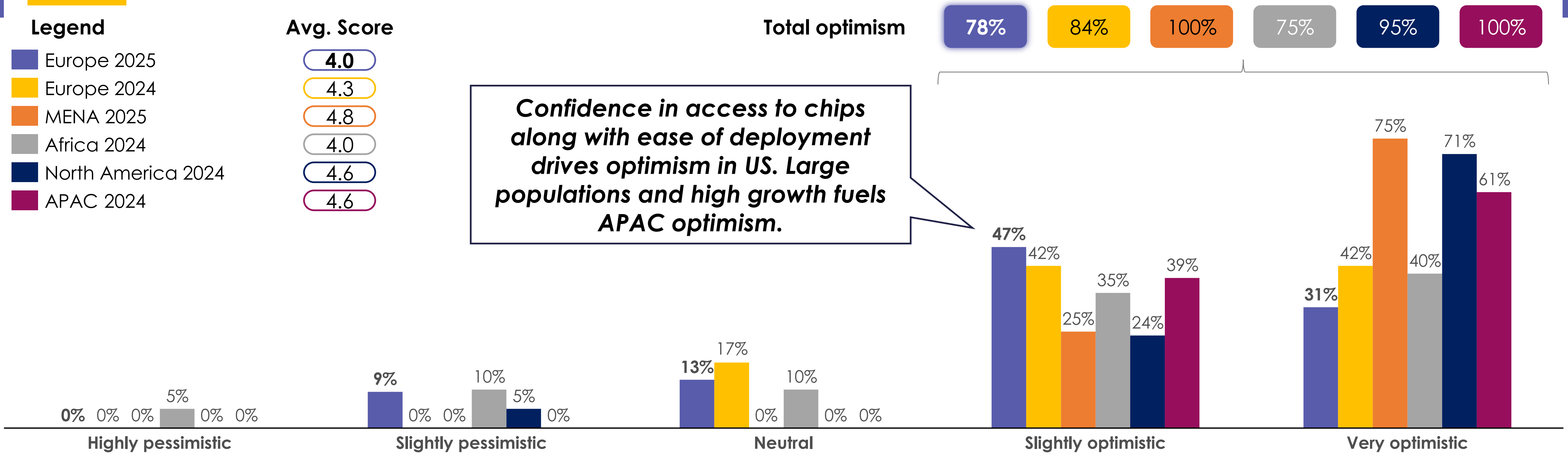
How optimistic are you on the outlook for the digital infrastructure sector?



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AI/ML and cloud services are seen as future growth drivers globally

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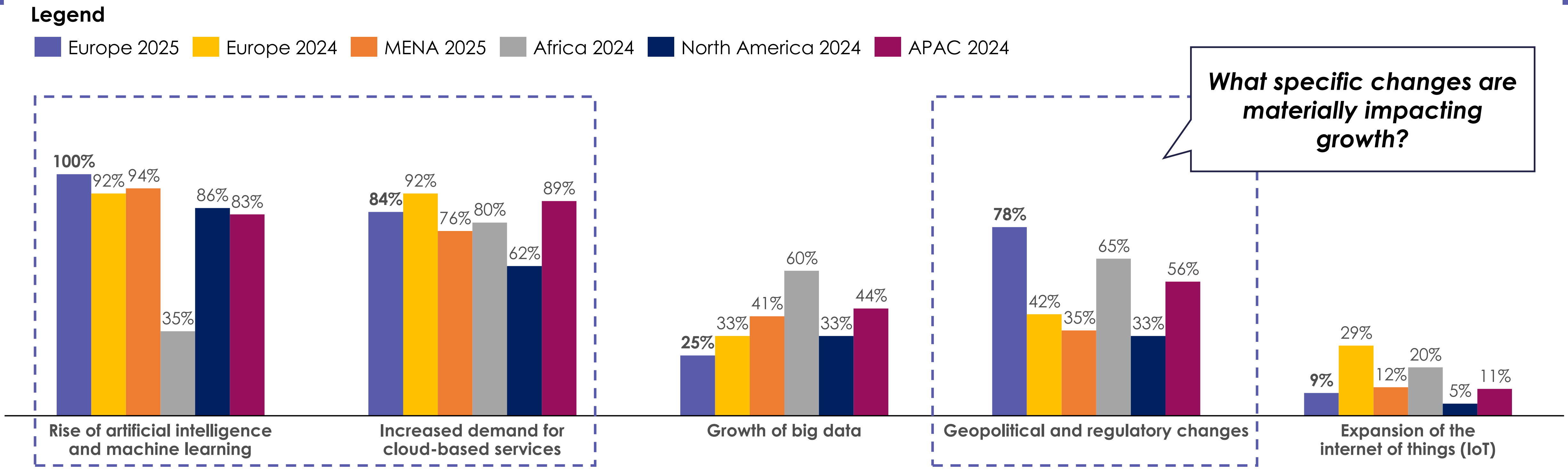
In your opinion, what are the key drivers for the growth of the digital infrastructure market?

(% of respondents that agree the area is a key growth driver)



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These deployments, driven by hyperscaler needs and data sovereignty, fuel DC demand

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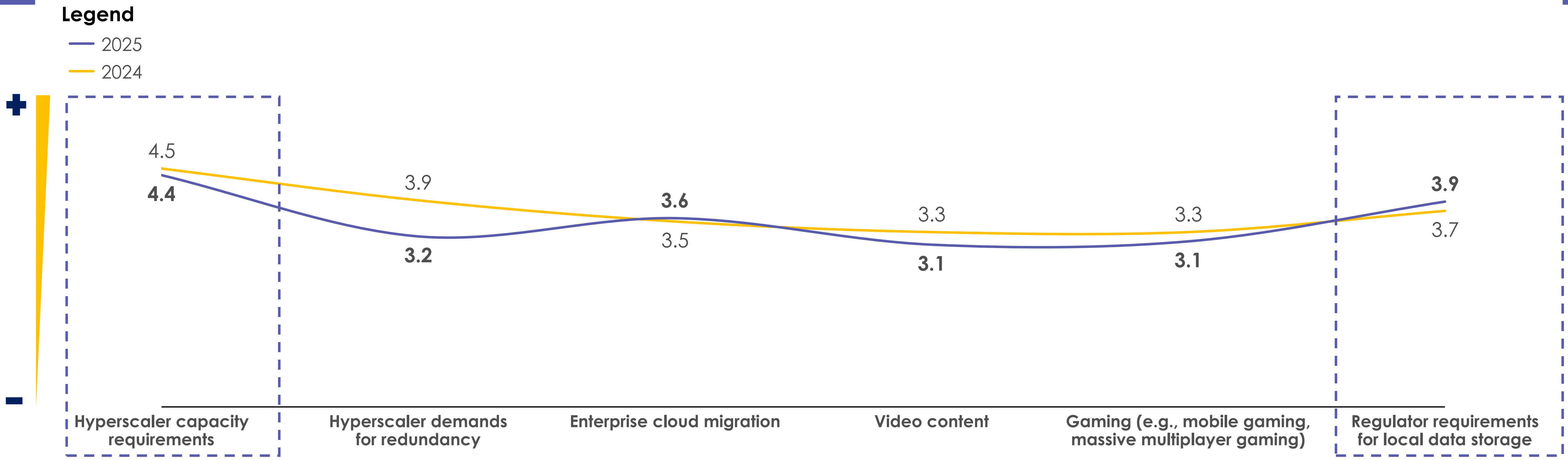
How will the relevance of the following data centre demand capacity factors change over the next 24-months? *(1 – not relevant, 5 – very relevant)*



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Optimism around DCs has shown little change over the past two years

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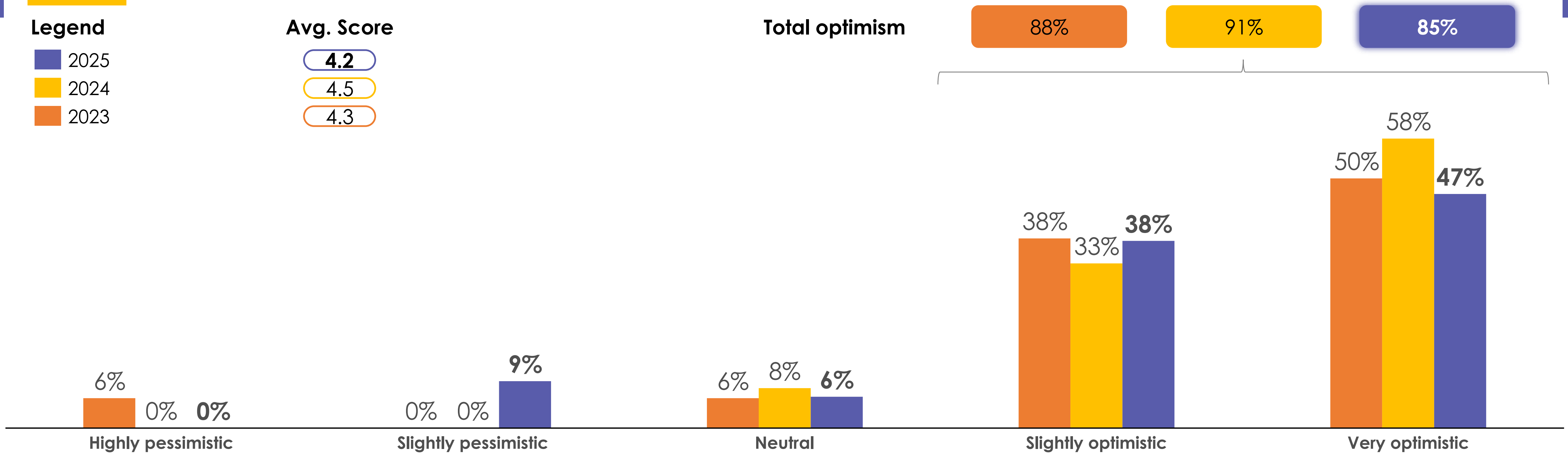
How optimistic are you on the outlook for the data centre sector in Europe?



Notes: n (2025) = 32, n (2024) = 24, n (2023) = 24, May not add up to null responses provided; Sources: Previous DIL, FTI Delta analysis

However, MENA and APAC regions are reporting greater optimism

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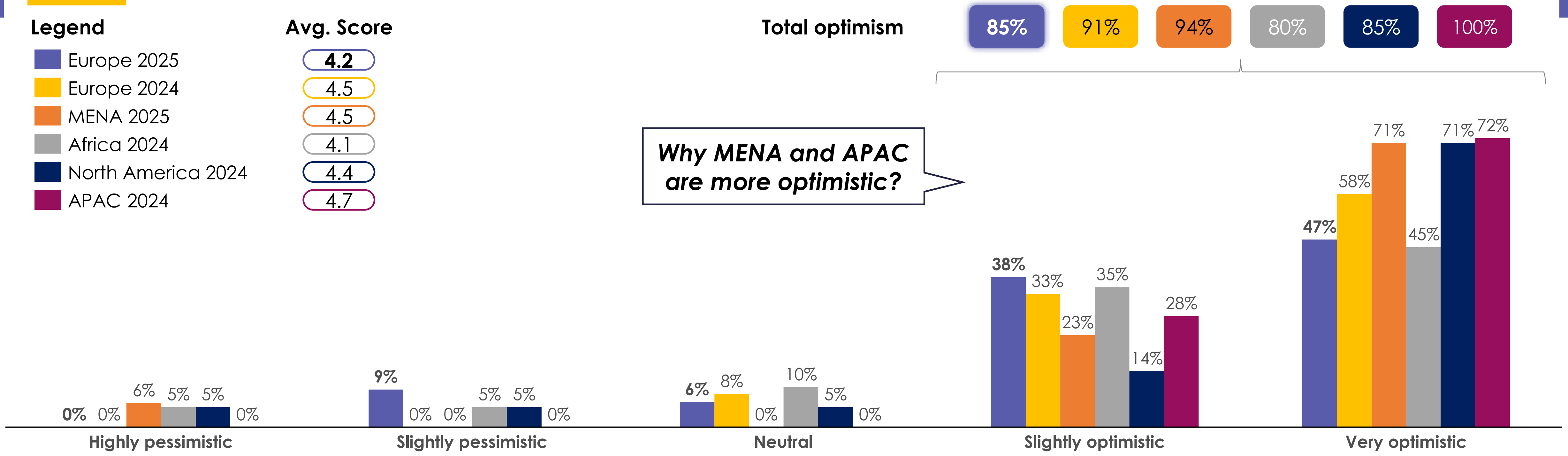
How optimistic are you on the outlook for the data centre sector?



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Tech, footprint expansion, and power supply are set to shift most in the DC business model

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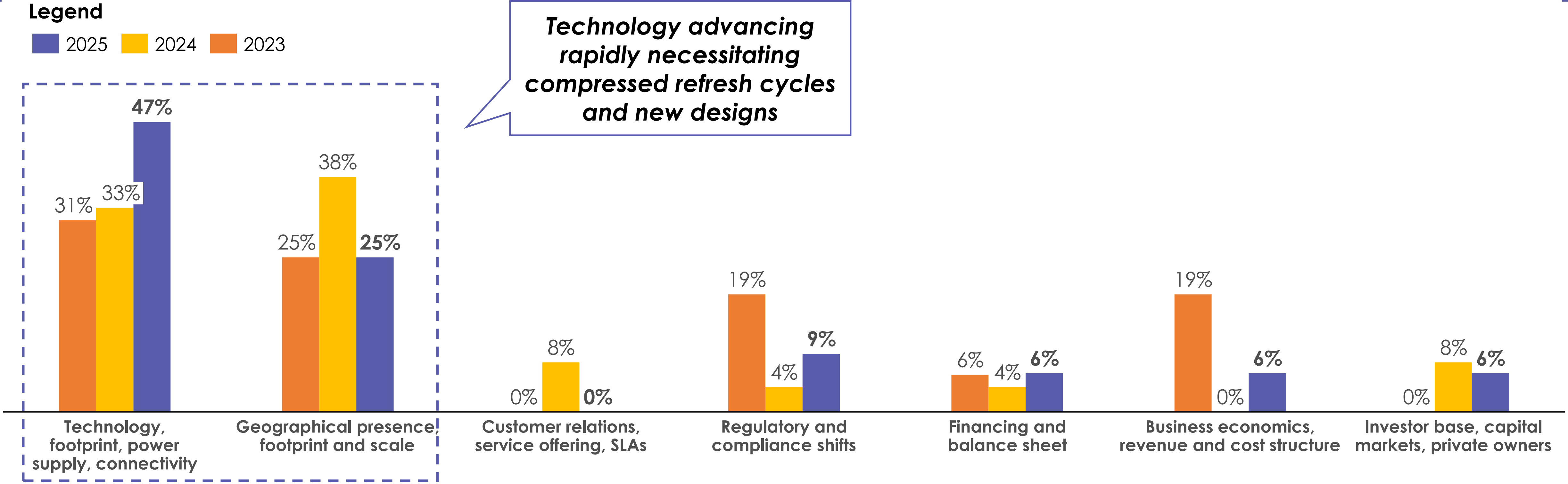
In your opinion, which parts of the DC business model will change the most in the next 24 months?

Technology advancing rapidly necessitating compressed refresh cycles and new designs



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There is a slight decrease in terrestrial fibre optimism in Europe

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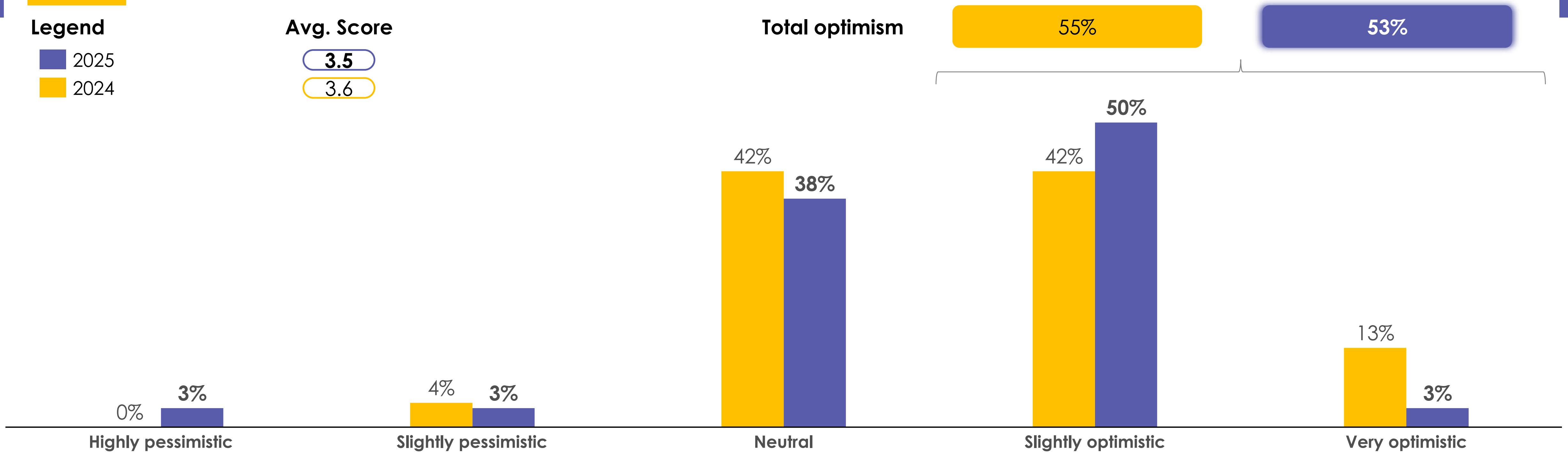
How optimistic are you on the outlook for the terrestrial fibre sector in Europe?



Notes: n (2025) = 31, n (2024) = 24, May not add up to null responses provided; Sources: Previous DIL, FTI Delta analysis

Optimism in terrestrial fibre is now among the lowest between regions

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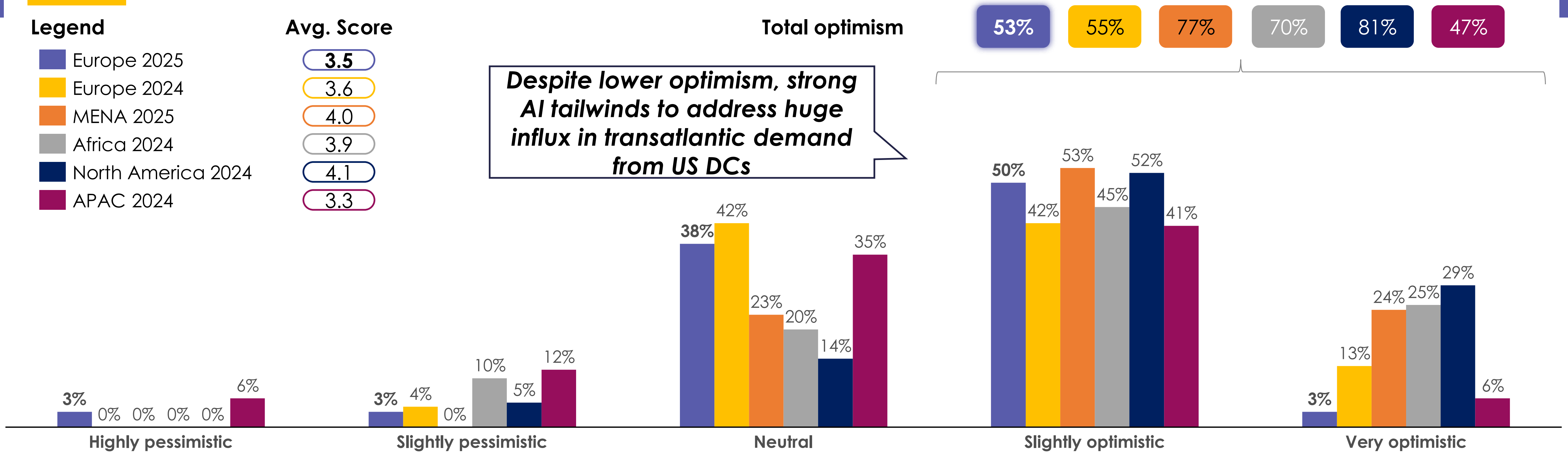
How optimistic are you on the outlook for the terrestrial fibre sector?



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And subsea? 60% of all respondents are slightly or very optimistic…

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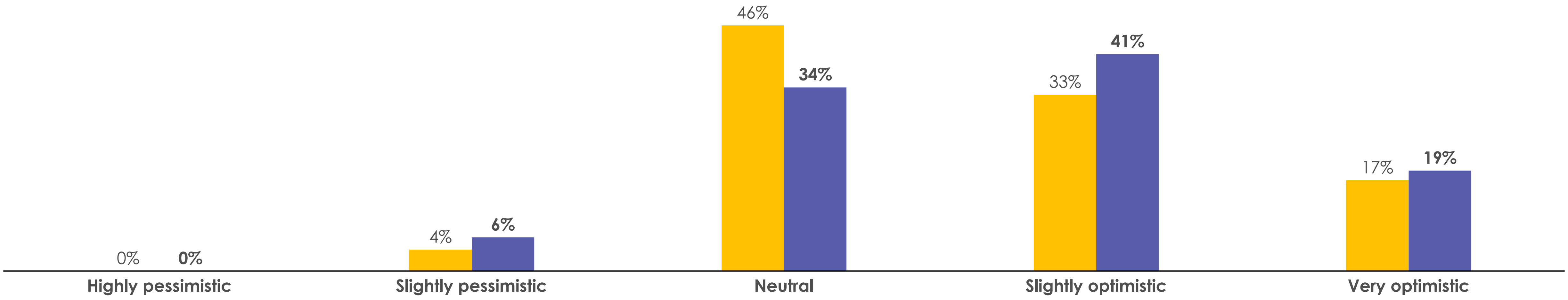
How optimistic are you on the outlook for the subsea cable sector in Europe?

Legend	Avg. Score
2025	**3.7**
2024	3.6

Total optimism: 50% (2024), **60%** (2025)



Notes: n (2025) = 32, n (2024) = 24, May not add up to null responses provided; Sources: Previous DIL, FTI Delta analysis

Optimism around subsea cables in Europe exceeds that in North America and APAC

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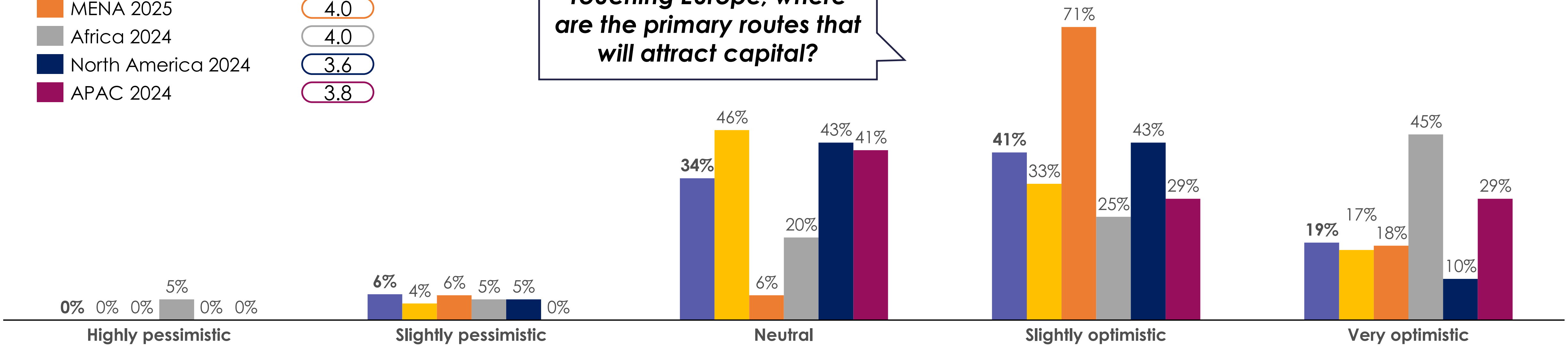
How optimistic are you on the outlook for the subsea cable sector?

Legend	Avg. Score
Europe 2025	**3.7**
Europe 2024	3.6
MENA 2025	4.0
Africa 2024	4.0
North America 2024	3.6
APAC 2024	3.8

Total optimism	Europe 2025	Europe 2024	MENA 2025	Africa 2024	North America 2024	APAC 2024
	60%	50%	89%	70%	53%	58%

Touching Europe, where are the primary routes that will attract capital?



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Summary of discussion

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01 | **Changing profile of funding sources**

- Significant public sector investment, e.g., France's €100bn commitment + Middle East gov-led partnerships
- Hyperscalers are shifting to shorter investment horizons, typically 2 years instead of 4-5 years
- Investors prioritize data centers (DCs) over renewables due to higher returns, influencing capital allocation

02 | **Anticipated need to shift to inference investment**

- Anticipated flip in 3-5 years, with 90% of AI investment focusing on inference and 10% on training
- Inference requires 3-10GW for every 1GW of training, driving investment in distributed infrastructure
- Europe has lost ground in training but sees a strong future in inference due to proximity to users

03 | **Build and they will come? Or once they have confirmed they will come?**

- Debate on speculative DC builds: some advocate building ahead of demand, while others caution against it
- India demonstrates rapid DC construction, completing projects in 12 months, reducing lead times
- Oil and gas companies are buying land near pipelines for DC development, signalling cross-industry investment

Deep Dive 1: Digital Infra for AI

Digital Infra Leaders Summit

01

Scene Setting: Industry Economics and Key Trends

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Deep Dive 1: Digital Infra for AI

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Deep Dive 2: Power

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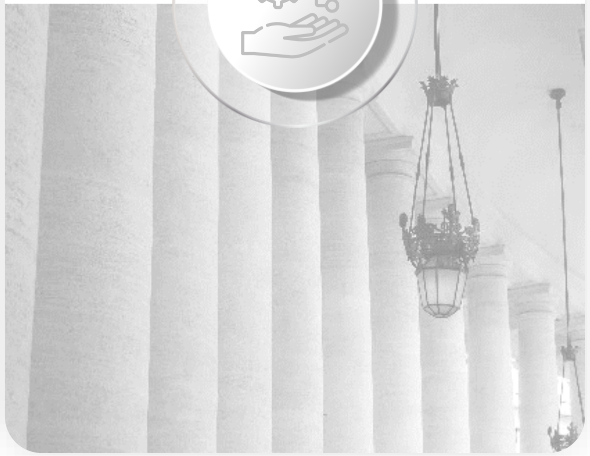
Wrap-Up and Actions



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2025
June 2025, Cannes


2025
June 2025, Cannes

Questions to stimulate discussion

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01 How will AI reshape demand for digital infrastructure in Europe?

02 How prepared is the region's digital infrastructure to meet AI demand?

03 What are the key areas of collaboration required between digital infrastructure providers to ensure the region can be AI-ready?

Source: FTI Delta analysis

Respondents think AI will have the greatest impact on DC demand vs. other digital infra

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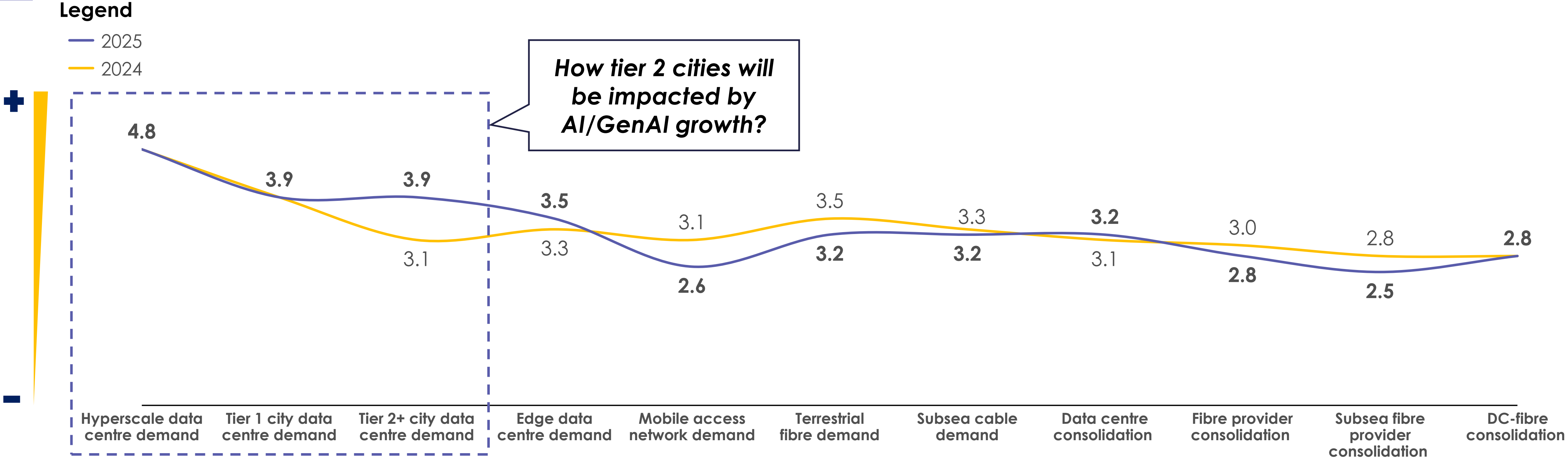
To what extent do you believe the growth in AI/GenAI will impact the following?

(1 – no impact, 5 – high impact)



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How to realise the AI opportunity? CAPEX and partnerships are the initial key priorities

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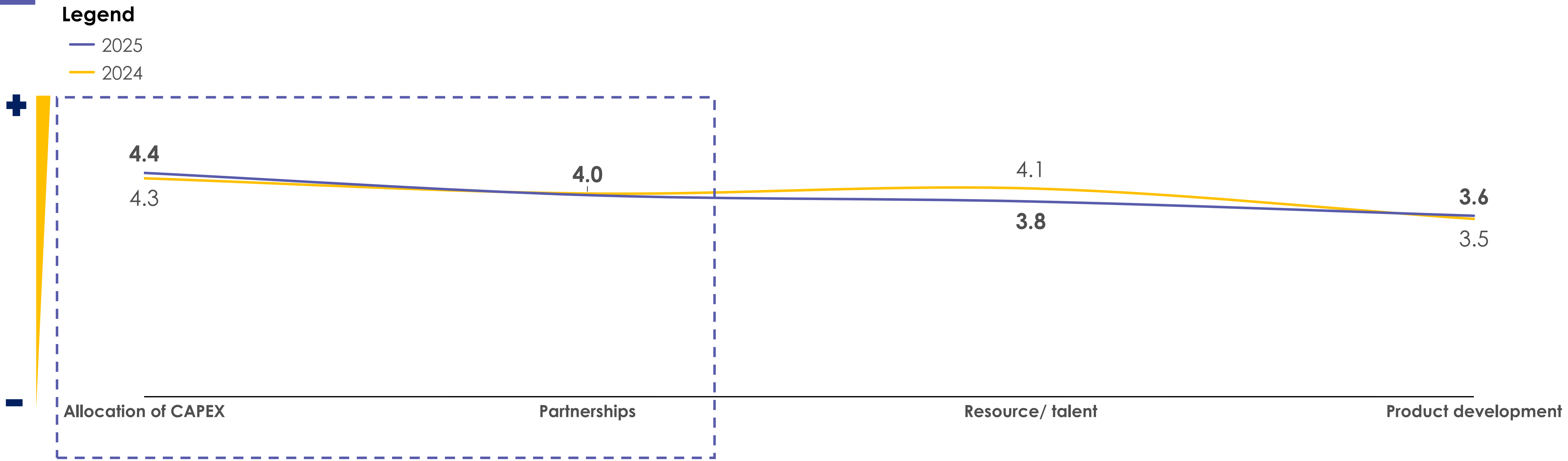
How relevant are the following in your leadership focus today with regards to AI?

(score 1-5 with 1 being lowest and five being highest focus)



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Summary of discussion

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01 An evolving network topology

- AI networks are evolving as the internet, with multiple cloud zones / edge locations vs. centralized training zones
- Latency requirements (e.g., 12ms) necessitate inference nodes in 75 European cities, driving distributed infra
- Edge DCs are growing, from 2MW to 4MW, reflecting increased demand for localized processing

02 It's not just about DCs, fiber matters

- Rising concerns about fibre availability to support growing DC demands, particularly transatlantic routes
- Fibercos are assessing DC landscape trends, such as single vs. multi-tenant DCs and inference opportunities
- Need for new fibre routes and resiliency to manage the influx of demand from US DCs

03 Varying regional dynamics… and opportunities

- **US** shows high optimism for DC deployment due to ease of execution and chip delivery confidence
- **Asia** benefits from large populations and latency-driven DC needs
- **Europe** lags in large-scale AI DCs but has opportunities in edge nodes, CDN nodes, and enterprise DCs
- Centralization is more economical, but hyperscalers' placement decisions will shape internet decentralization

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Deep Dive 2: Power

Digital Infra Leaders Summit

01

Scene Setting: Industry Economics and Key Trends

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Deep Dive 1: Digital Infra for AI

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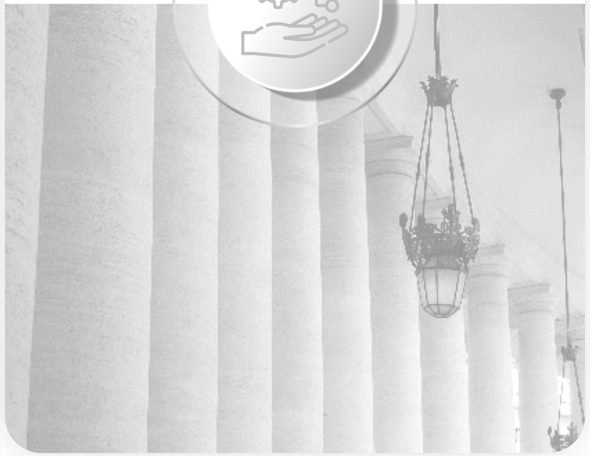
Wrap-Up and Actions



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Questions to stimulate discussion

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01 How can we secure scalable, low-carbon power access especially in power-constrained regions?

02 How can we overcome grid challenges?

03 Which emerging markets offer the best long-term alignment between power availability, sustainability goals, and infrastructure readiness?

Source: FTI Delta analysis

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A Nearly 90% expect an increase in power supply to support digital infrastructure

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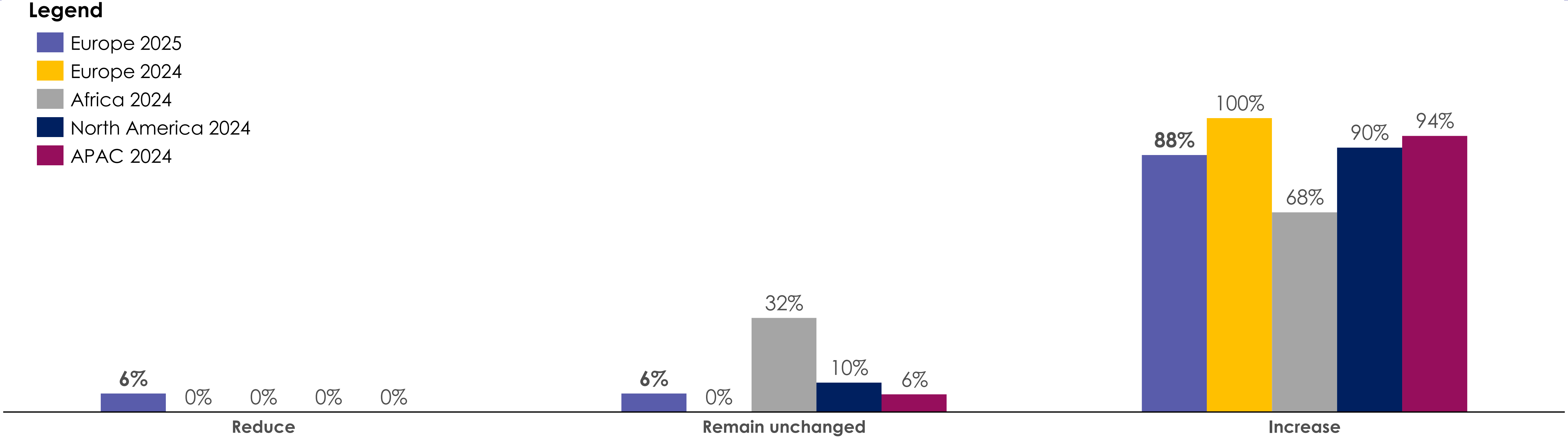
How will the relevance of power supply for digital infrastructure change over the next 24 months?



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Sources: Previous DIL, FTI Delta analysis

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A

Onsite renewables and batteries fill the short-term gap; nuclear and fuel cells to take over in 5+ years

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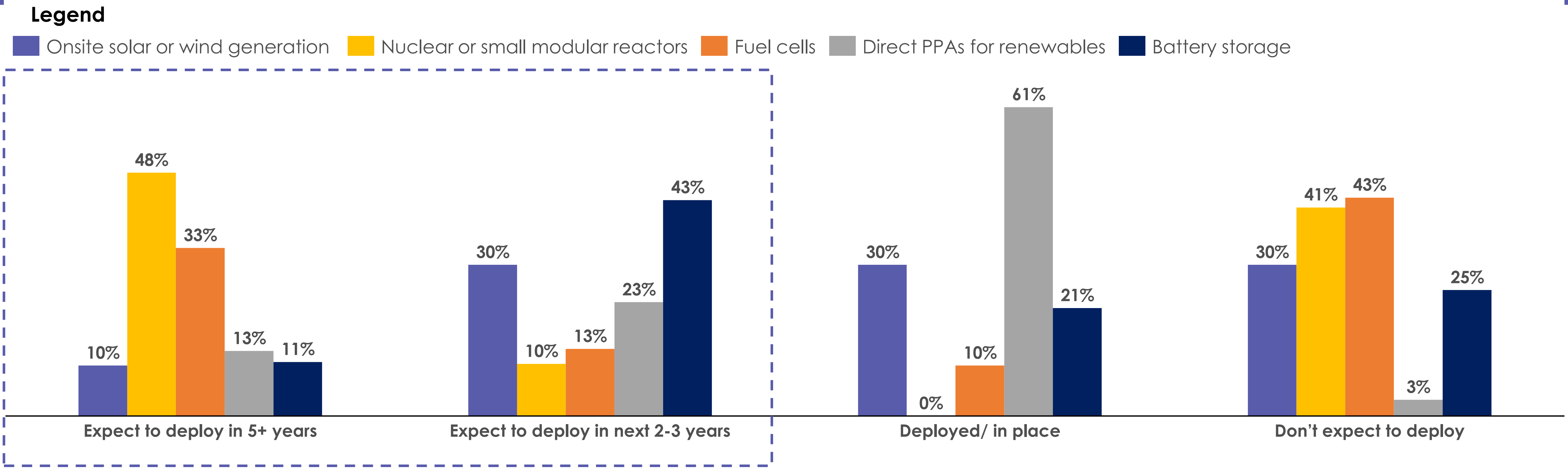
Which alternative energy solutions do you currently use/ plan to use to meet power demand?



Note: n (2025) = 28-31; May not add up due to null responses provided; Source: FTI Delta analysis

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B

Closer utility collaborations and shifting to non-traditional locations are key to avoiding power bottlenecks

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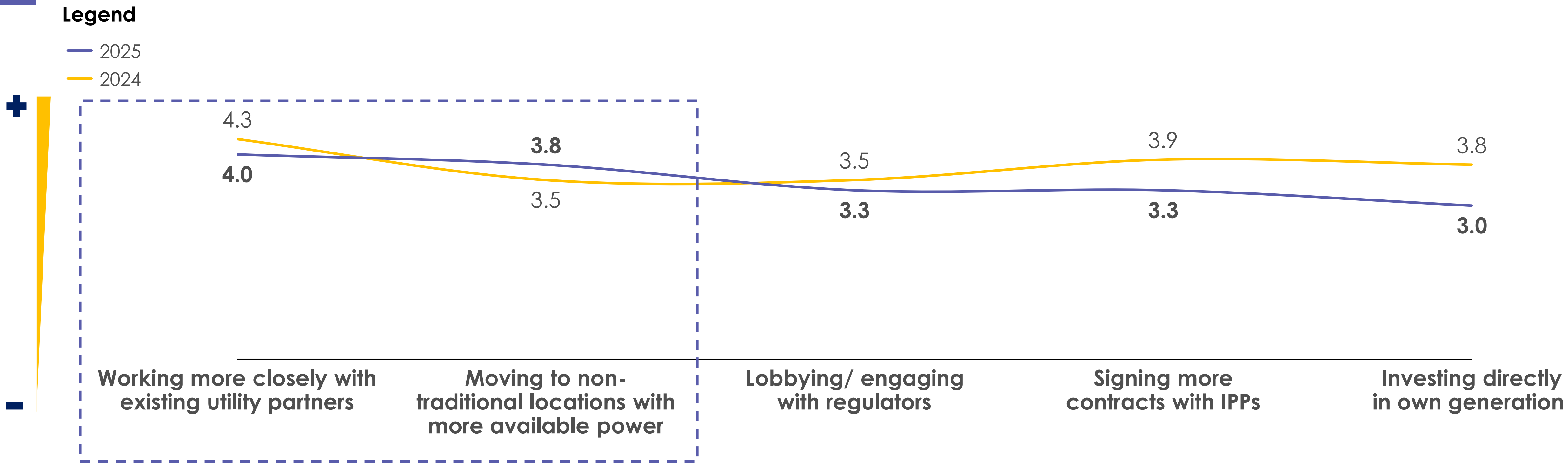
To avoid power becoming a limiting factor in your growth, what will be the most important strategies? *(1 – low, 5 – high)*



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Sources: Previous DIL, FTI Delta analysis

C Most markets show low to medium confidence in affordable green energy access

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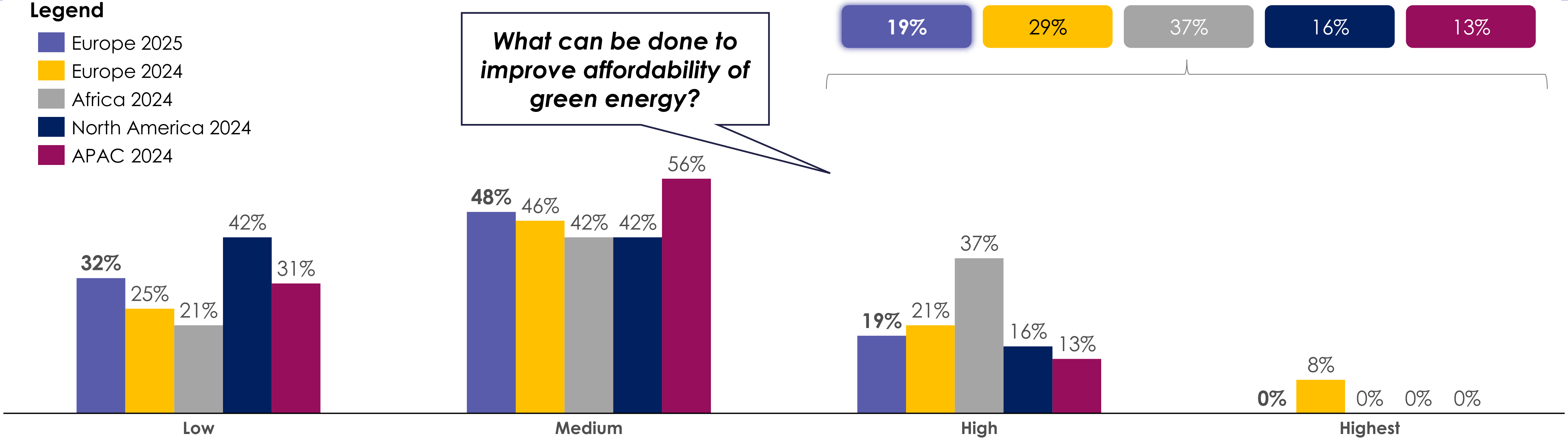
What level of confidence do you have today that you will be able to access sufficient green energy at affordable prices for your current business model?



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Sources: Previous DIL, FTI Delta analysis

C

Despite rising costs, Europe has the joint lowest focus on energy efficiency across regions

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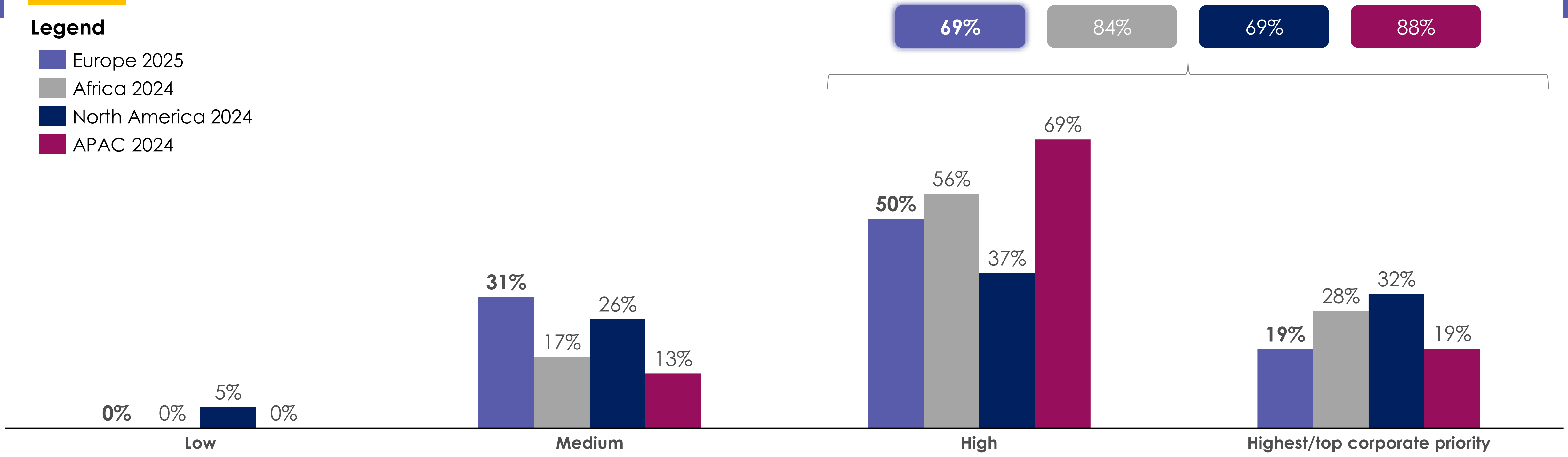
How much emphasis does the company place on improving energy efficiency?



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A

Despite this, green energy adoption priority in the EU dropped to 47%, lowest among regions

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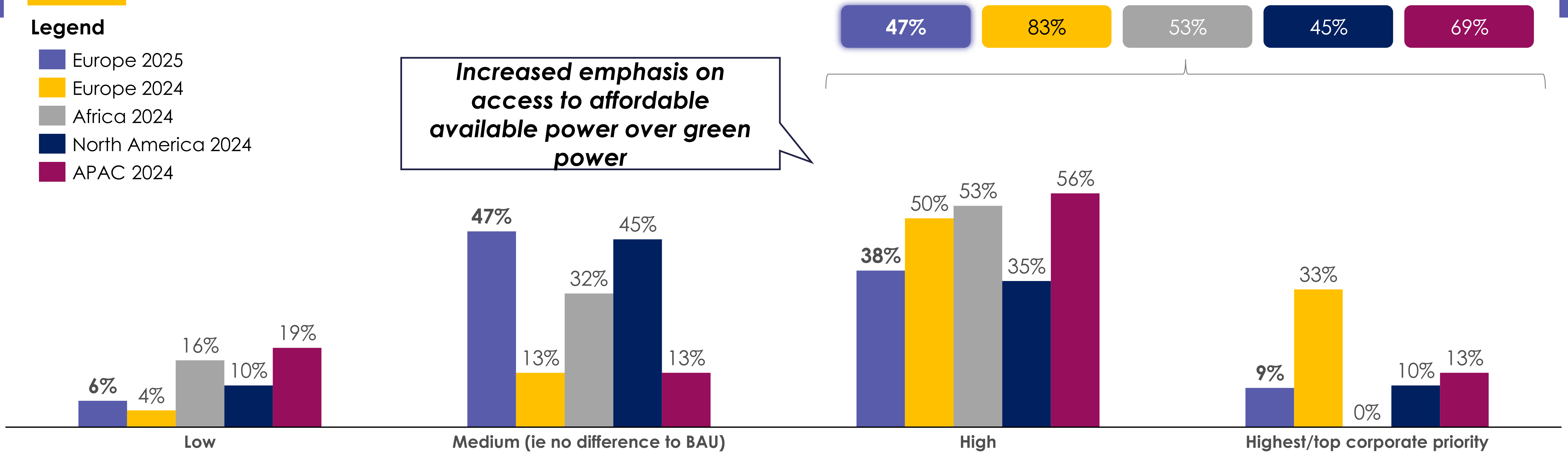
What is the current level of priority for adapting to a green energy supply?



Notes: n (Europe, 2025) = 32, n (Europe, 2024) = 24, n (Africa, 2024) = 20, n (NA, 2024) = 21, n (APAC, 2024) = 18; May not add up due to null responses provided;
Sources: Previous DIL, FTI Delta analysis

Summary of discussion

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01 Power Availability and efficiency challenges

- Lack of affordable power limits large AI workloads; Nordics offer low-cost power but lack connectivity
- Higher power chips are increasing data center PUE, with improvements expected after a transitional phase
- Nuclear power is only 35% efficient currently, needing to reach 75% to meet DC demands effectively

02 Grid interaction and innovation

- DCs are encouraged to support grids by freeing up capacity and addressing transmission losses
- AI-driven grid virtualization can optimize power management, replacing manual methods with software solutions
- DC CEOs report frequent discussions with grids, and view current interconnection lead times as a risk

03 Regulatory requirements and off-grid solutions

- Better regulation and finely tuned DC power management solutions are critical to addressing power constraints
- Off-grid solutions and grid balancing face challenges due to grids prioritizing primacy over power allocation
- Speculative DC projects inflate power requirement estimates, requiring collaboration with grids

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Wrap Up and Actions

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01

Scene Setting: Industry Economics and Key Trends

02

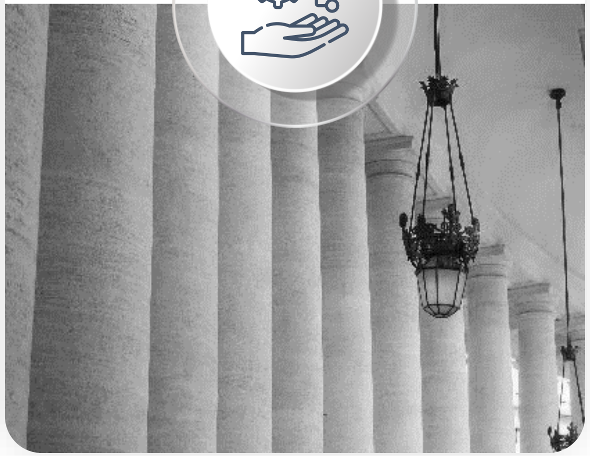
Deep Dive 1: Digital Infra for AI

03

Deep Dive 2: Power

04

Wrap-Up and Actions



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Talent shortage, tariffs, power constraints, and poor planning are among your top concerns

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Talent Shortage

Critical skill shortages in engineering and infrastructure are slowing growth and innovation

Power Constraints

Grid limitations are capping expansion and delaying AI infrastructure rollout

Tariffs and Supply Chain Risk

Trump trade policies threaten cost stability, hardware availability, and investment sustainability

Poor Infrastructure Planning

Rapid deployments lack power, redundancy, and integration planning - amplifying execution risk

Source: FTI Delta analysis

Themes around connectivity, power security and capital allocation are consistent between 2024-25

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Within the digital infrastructure sector, what is the top priority for the next 12 months to ensure continued growth?

KEY THEMES	Last year	This year
Connectivity infra expansion	■ Expand 5G network	■ Build new fibre routes ■ Densify existing network paths
Efficiency & optimisation	■ Attract the right talent into the industry ■ Deploy AI-enabled technologies	
Land & power security	■ Partner with utility companies	■ Access to powered land ■ Ensure affordable, sustainable energy ■ Form power generation partnerships
Capital allocation	■ Access to cost-effective financing	■ Align stakeholders on appetite to invest capital at risk ■ Deploy capital quickly to keep-up with demand
Innovation	■ Invest in new technologies (AI, hydrogen, cooling…) and innovation to drive efficient, sustainable solutions	

Sources: Previous DIL, FTI Delta analysis

Energy strategy and access to low carbon power are seen as the greatest potential

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High frequency of mentions

As an investor / operator in the digital infrastructure industry, where do you see the greatest potential for future value creation and how are you addressing these opportunities?

KEY THEMES	2024	2025
	Energy strategy & resilience (access to low carbon power)	Energy strategy & resilience (access to low carbon power)
	AI infrastructure deployment	AI infrastructure deployment
	Strategic partnerships (incl. Power regulators and providers)	Strategic partnerships (incl. Power regulators and providers)
	Geographic expansion & edge market penetration	Geographic expansion & edge market penetration
	Connectivity investments	Connectivity investments
	GTM through asset differentiation	GTM through asset differentiation
		Adaptive delivery & modular design (liquid/air cooled)
		Operational efficiency through digitisation

Sources: Previous DIL, FTI Delta analysis

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Wrap-up

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1. What is your key takeaway from today?
2. Where do digital infra providers need to work together?
3. What specific collaborative activities could be considered?

Source: FTI Delta analysis

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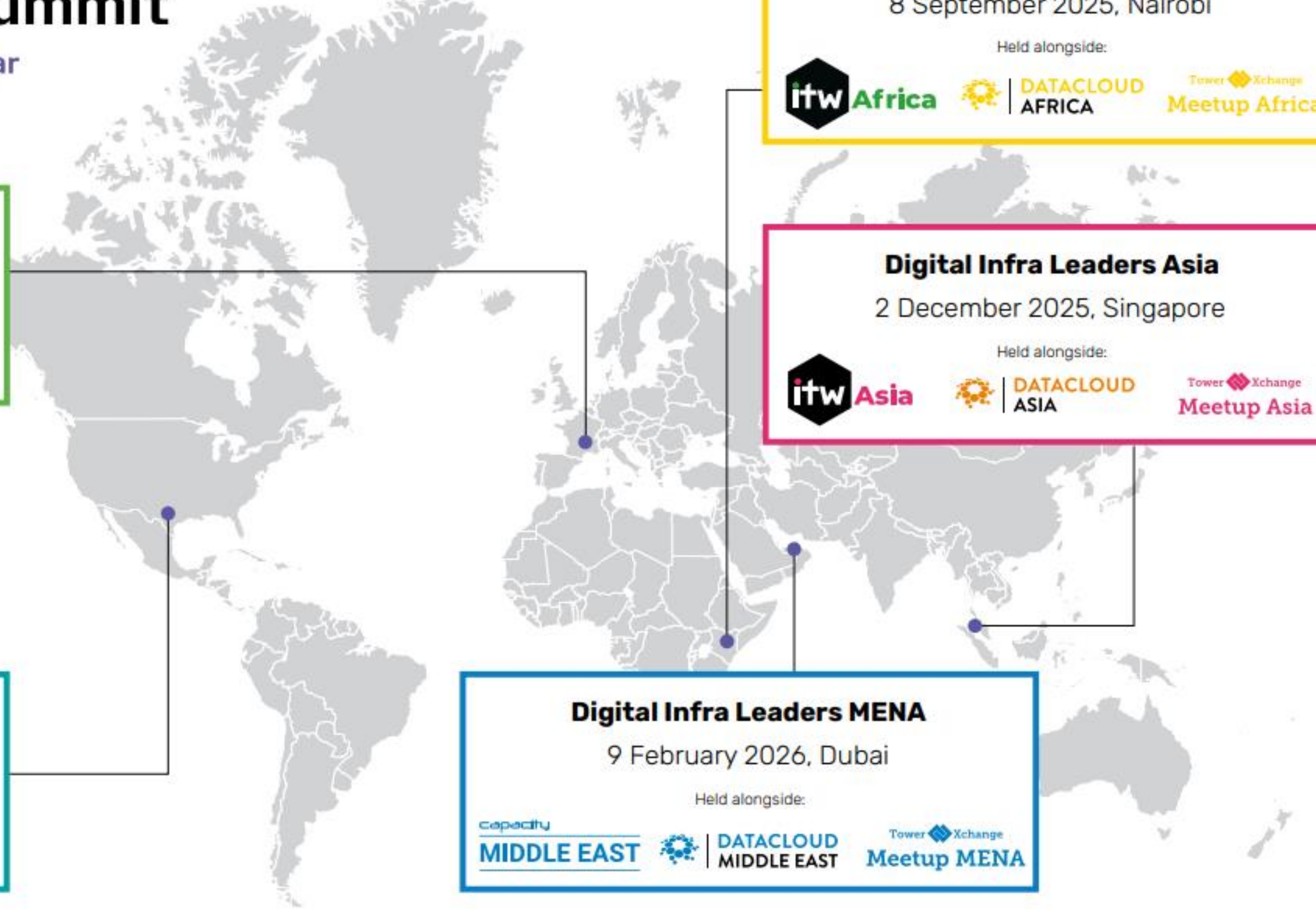
2025/2026 Calendar



Digital Infra Leaders Africa

8 September 2025, Nairobi

Held alongside:

itw Africa | DATACLOUD AFRICA | TowerXchange Meetup Africa

Digital Infra Leaders Europe

1 June 2026, Cannes

Held alongside:

DATACLOUD GLOBAL CONGRESS

Digital Infra Leaders Asia

2 December 2025, Singapore

Held alongside:

itw Asia | DATACLOUD ASIA | TowerXchange Meetup Asia

Digital Infra Leaders USA

15 September 2025, Austin

Held alongside:

DATACLOUD USA | METRO CONNECT FALL

Digital Infra Leaders MENA

9 February 2026, Dubai

Held alongside:

capacity MIDDLE EAST | DATACLOUD MIDDLE EAST | TowerXchange Meetup MENA

About the organisers

With deep and long-standing networks spanning the entire digital infrastructure community, the Digital Infra Leaders Summits are a collective effort of techoraco's Capacity Media, Datacloud, the GLF, ITW and TowerXchange

capacity
a techoraco brand

Capacity Media is the premier and most trusted source of information and networking for those #KeepingTheWorldConnected, made up of the global connectivity and digital infrastructure communities.

Through our world-renowned series of large scale and regional events, awards, our print products such as Capacity Magazine, our daily digital news coverage, Capacity TV channel, and executive podcasts; Capacity Media is your authority on the latest developments shaping the industry of tomorrow.

Our eminent events portfolio includes International Telecoms Week (ITW), the Capacity series, Metro Connect and the Global Carrier Awards. Join us in our mission to connect people and communities across the global digital infrastructure industry.

https://www.capacitymedia.com/

DATACLOUD
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Datacloud exists to facilitate the growth of the global IT infrastructure ecosystem. From investment, to design, through to operation, our network reaches the full life cycle of the data centre, cloud, edge, finance, and big tech industries.

Through our slate of global events we provide thought-leadership directly from the most senior leaders in our space, and unique networking opportunities around the world.

We understand the importance of data infrastructure in modern society, and we believe in the power of connections

https://datacloudseries.com/

GLF community

The GLF is a membership organisation that provides a single voice to the broader digital ecosystem, ensuring alignment amongst international connectivity leaders for industry transformation. Our mission is to provide leadership to the industry that is #KeepingTheWorldConnected based on the principles of interoperability, connectivity, and value creation.

www.itwglf.com

itw
a techoraco brand

International Telecoms Week (ITW) is the world's largest annual meeting for the global connectivity community to meet, learn and conduct business. Uniting decision makers from across the telecoms and ICT Infrastructure ecosystem, this is a must-attend event for anyone who is enabling and pioneering the future of communication.
In 2023, we expanded our horizons and bringing you ITW Africa! The only event in Africa where you can meet the entire infrastructure value chain, including cloud, finance, satellite, and carrier providers.

www.internationalteleomsweek.com

TowerXchange
a techoraco brand

TowerXchange is the market leader in telecom tower industry market intelligence. Our premium data sets and industry reports are trusted by towercos, MNOs, investors, equipment vendors and solution providers.

Our annual series of Meetups represent the most important date on the calendar for tower industry professionals and have been assembling CXOs and the who's who in digital infrastructure for over a decade

www.towerxchange.com