

SOCIOGENCIA BRIEFS · EDITION 02 · PEOPLE AND MACHINES

People and machines

Four cases about what the build actually runs on. Where enterprise compute settled once the dust cleared. The bill the server hall sends to your laptop. The workforce that decides whether the power is ever switched on. And a rendered 2036 in which six machines work a shift.

04 · THE CONTINUUM

5 tiers

And the money moved to the seams

05 · THE MEMORY SUPERCYCLE

~70 %

Of world memory output, to AI

06 · THE TALENT CRUNCH

2.3 m roles

Workforce ranks second, and is not measured

07 · THE BODY ELECTRIC

2036

Six machines, three computers each

THE FULL REPORT IS OPEN AT [ENTELEGENCIA.REPORT](https://entelligencia.report)

Four cases · thirteen pages · Sociogencia Edition 01 covers cases 01 to 03

Scan for the live report,
every instrument and
every source



Four cases, thirteen pages.

Edition 01 took the argument about the build. These four take the build itself: where the compute settled, what it costs everyone else, who has to run it, and what it looks like a decade out.

CASE 04



The Continuum

The stack

Not consolidating into the cloud, not collapsing onto the desk. Stratifying.

Market	\$337bn to \$1.2tn
Centre of gravity	Inference, ~85%
The quiet winner	Colocation

CASE 05



The Memory Supercycle

The bill

How the data centre's hunger for memory reprices every device you own.

AI share of output	~70%
Micron gross margin	84.9%
Where it ends	A checkout

CASE 06



The Talent Crunch

The people

The constraint that quietly decides whether the power is ever switched on.

Workforce	2.3m roles
Heaviest need	APAC, 140k
Ranks	Second of five

CASE 07



The Body Electric

The machines

Six machines work a shift. Each one is three computers.

Set in	2036
Format	Article and game
The record	Verified

HOW EVERY FIGURE IS GRADED

VERIFIED	On the record, confirmed by the primary party.
ANNOUNCED	A commitment, not delivered capacity.
CONTESTED	Publicly disputed, or sources disagree.
ESTIMATED	A desk figure, modelled and framed as such.

Case 07 is set in 2036. The record underneath it is verified; only the year has not arrived yet, and the case says so on its first screen.

HOW TO READ IT

Anything set in **gold** is a link. Case titles, tiers and every open prompt route to the live case.

The five-tier stack, the cascade trace, the delivery-risk weighting and the rendered 2036 are interactive and cannot be printed. They are summarised and linked in full.

THE SEVEN CASES

01 The Infrastructure Prime Minister	Politics
02 Hosting the Backlash	Perception
03 The Wrong Numbers	The arithmetic
04 to 07 People and machines	This document

Together the seven pressure-test the thesis the ten market chapters build.

[SEE THE DIRECTORY](#)

The Continuum

A box on a desk, a rack on a hyperscale floor, and the long line between them.

Enterprise AI compute is not consolidating into the cloud or collapsing onto the desk. It is stratifying into five tiers, and the money, along with the fight, has moved to the seams between them: the routing layer, the colocation floor, the residency rule, the network port.

MARKET • 2025 TO 2030

337bn to 1.2tn
In US dollars

CENTRE OF GRAVITY

~85 %
Of enterprise AI is inference

THE QUIET WINNER

Colo
The hinge tier

SOURCING

Public graded
451, Gartner, Bain

READ THE FULL CASE

Five tiers, and the money moved to the seams.

The desk is not a war. AI PCs are the shipment majority now, but they compete only at the shallow end. Routing is the whole game: winners send each workload to the tier its economics demand.

Hyperscale the summit Frontier training, multi-tenant inference, the global APIs TIER 05	Sovereign and regional the flag Jurisdiction-bound workloads, national platforms, residency TIER 04	Colocation the hinge High-density clusters, multi-cloud interconnect, compliance TIER 03	On-prem server the firewall Departmental clusters, regulated workloads inside the firewall TIER 02	AI PC the desk The desk-side node: RAG, code assistants, sensitive work TIER 01
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The whole argument, in six lines

SIX MOVEMENTS, ON THE LIVE CASE

01 The desk is not a war Shallow end only	02 Routing is the whole game Economics, not habit	03 The quiet winner Colocation
04 Regulation is the engine Residency drives tier 04	05 The summit becomes a utility Hyperscale commoditises	06 The boundaries are the business The seams, not the tiers

THE FINDING

Colocation is the quiet winner.

It is the hinge tier: high enough density for the clusters, neutral enough for multi-cloud interconnect, and compliant enough for the workloads that cannot sit in a public region. Regulation is the engine, the summit becomes a utility, and the boundaries between the tiers are where the business now is.

~85%
Of enterprise AI is inference not training

Sourcing: 451 Research, Gartner and Bain, graded.

The Memory Supercycle

The supply story is land, power and capex. This is the bill.

AI data centres now consume roughly 70 per cent of the world's memory output, and the three firms that make it have swung the bulk of production to the high-bandwidth memory that wraps an AI chip. The conventional memory left for your laptop, phone and console is scarcer and far dearer.

AI SHARE OF OUTPUT

~70 %

Up from about 25 per cent

MICRON GROSS MARGIN

84.9 %

Guiding to about 86

WHERE IT STARTS

A server hall

And where it ends is a checkout

SOURCING

Public graded

TrendForce, Morgan Stanley, IR filings

READ THE FULL CASE

The server hall starves the laptop.

The cascade that begins in a server hall ends at a checkout. Five links, traced end to end, and one income statement that tells the whole story.

The source

LINK 01

the pull

AI's memory appetite. Every accelerator is wrapped in premium memory.

The swing

LINK 02

the choice

Makers pivot to high-bandwidth memory, and making it crowds out the cheap kind.

The squeeze

LINK 03

the shortage

Consumer memory dries up, at a pace the industry has not seen before.

The pass-through

LINK 04

the BoM

Devices cost more to build, and memory is too large a share to absorb.

The bill

LINK 05

the checkout

The price you pay. On 25 June 2026 Apple, Microsoft and others moved at once.

84.9

 per cent

Micron gross margin, and guiding to about 86

One income statement tells it. With supply re-pointed to high-bandwidth memory, conventional memory prices have jumped at a pace the industry has not seen, and the margin a memory maker can now print is the clearest single measure of how far the swing has gone. Memory is now too large a share of a device's build cost for a manufacturer to absorb.

WHO DRIVES IT

Three firms

The makers who swung the bulk of production to high-bandwidth memory. The decision was rational and it was taken in months.

WHO IS EXPOSED

Every device maker

Laptops, phones and consoles. Memory is now too large a share of a build cost to absorb, so it reaches the shelf.

WHEN IT MOVED

25 June 2026

The day this analysis was filed, Apple, Microsoft and others moved at once. The live case shows what each move did to a shelf price.

TRACE THE CASCADE

Graded Estimated where the pass-through is modelled rather than disclosed. Sourcing: TrendForce, Morgan Stanley and investor-relations filings. The live case traces each link with its own evidence and shows what each 25 June move did to a shelf price.

The Talent Crunch

Power is the constraint everyone names. People decide whether it is ever switched on.

The workforce to build and run the AI estate has to grow faster than the market can make it, and it is the same scarce, slow-to-train people that every region is bidding for. This is the lens that runs under all ten markets in the report.

WORKFORCE

2.3m roles

By 2025

HEAVIEST NEED

140k

Asia-Pacific

HARDEST GAPS

Ops_{electrical}

The roles nobody can hire quickly

CONTRIBUTED

Kirsty Barnes

Simmons & Simmons

READ THE FULL CASE

Workforce ranks second. Almost nobody measures it.

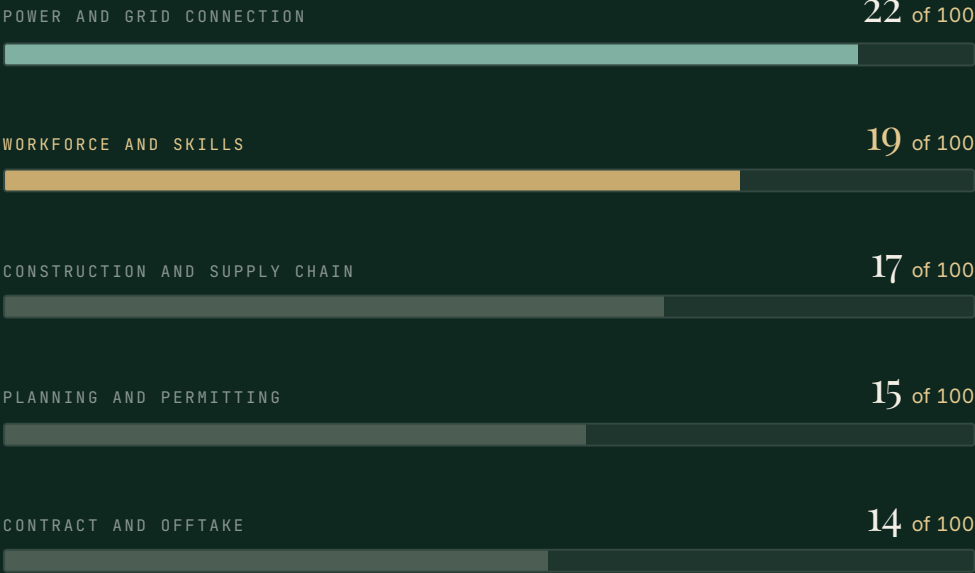
CONTRIBUTED • THE DELIVERY-RISK WEIGHTING

Kirsty Barnes

Global Co-head, Data Centres and Digital Infrastructure
Simmons & Simmons

Asked how a board should weight the delivery-risk stack when it prices a deal, Barnes gives numbers. The order is the finding, and it is not the order the industry works in.

THE DELIVERY-RISK STACK, WEIGHTED OUT OF 100



THE GAP THIS CASE IS ABOUT

Workforce sits above construction, planning, contract and offtake, and behind only power itself. Documents flag talent at the risk level. They rarely make workforce capacity a measurable project input the way they do for power, grid access or water.

That is the gap. Everything that follows in the case is the evidence for it: where the roles are, which ones cannot be trained quickly, and which regions are bidding for the same people.

Roles needed by 2025	2.3 million
Heaviest need region	Asia-Pacific, 140k
Hardest gaps discipline	Operations, electrical

READING THE BARS

Power leads, as it does everywhere in this report. The finding is the one beneath it: workforce outranks construction, planning and contract, and it is the only item in the five that most deal documents do not turn into a number.

OPEN THE CASE

Weighting contributed by Kirsty Barnes, Simmons & Simmons, July 2026, and graded Contributed. The delivery-risk lens is hers; the data and the recommendations are the Entelligencia desk's, graded and sourced like the rest of the report. This layer reads under all ten market chapters, and the African picture appears in Edition 02 of the chapter briefs.

The Body Electric

2036. Six machines work a shift. Each one is three computers.

The body it carries, the edge site it reaches in milliseconds, and the campus that rebuilds it overnight. None of this is science fiction: the record underneath is verified, and only the year has not arrived yet. The question was never whether the machines could work. It is whether the ground beneath them can carry the load.

SET IN

2036

A decade out from the record

THE CAST

Six machines

Rendered in the hologram lab

FORMAT

Article and game

Read it, or play it

THE RECORD

Verified

Only the year has not arrived

READ THE FULL CASE

Each machine is **three computers.**

This is why a robotics case sits inside an infrastructure report. A machine on a factory floor is not one device. It is a demand signal on three different tiers at once, and every one of them has to be built.

COMPUTER 01

The body it carries

Onboard compute, running the reflexes that cannot wait for a network round trip. Constrained by power, weight and heat in a way no data hall is.

COMPUTER 02

The edge site it reaches

Milliseconds away, and the reason latency is a physical constraint rather than a preference. A fleet needs this tier within a fixed radius, which decides where it can operate at all.

COMPUTER 03

The campus that rebuilds it

Overnight retraining on the hyperscale tier. This is the load that shows up in the megawatt figures the rest of the report tracks, and it arrives as a fleet scales rather than as a single deployment.

The tier the report calls the desk

Why 230 ms is a limit, not a target

Where the gigawatts actually land

THE SCENE

Six machines work a shift.

A quadruped on an inspection round. An autonomous mobile robot moving stock. A humanoid on a line. A robotaxi between depots. An articulated arm. A domestic unit at the end of the day. Six named machines, each rendered in the hologram lab, and each one drawing on all three tiers at once.

18

Computers in one shift
Six machines, three each

THE QUESTION

Never whether they could work.

It is whether the ground beneath them can carry the load. Six machines working a shift is a modest scene. Multiply it by a fleet and it becomes a demand curve that lands on exactly the three tiers this report spends ten chapters counting. That is the argument the case exists to make, and it is why it closes the series.

PLAY OR READ THE CASE

Four cases, one supply chain.

Read together these four run the length of the thing. Where the compute settles, what the silicon costs everyone else, who has to run it, and what the load looks like when the machines arrive.

Case	WHAT IT FOLLOWS	WHAT IT FINDS
04 Continuum	Where enterprise compute actually sits	Five tiers, and the money moved to the seams between them
05 Memory	What the build costs everyone else	Roughly 70 per cent of world memory output, and a bill that ends at a checkout
06 Talent	Who has to build and run it	Workforce ranks second of five, and almost nobody measures it
07 Body Electric	What arrives next, and on which tier	Each machine is three computers, and all three have to be built

The thread

Every one of these is a second-order consequence of the build the market chapters count. The megawatt figures are the first-order story. What they cost, who runs them and where the workloads settle is the rest of it, and it is where the commercial argument actually sits.

Why they are cases, not chapters

None of them is about a place. A market chapter has to be even-handed because someone is deciding whether to invest there. These follow one argument to its end and name what they find, which is a different job and needs a different form.

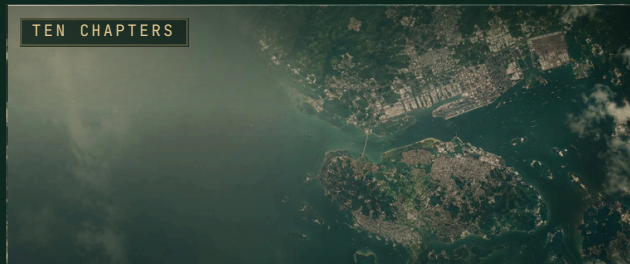
Where they feed back

The workforce lens runs under all ten markets, and appears in the African chapter briefs as the dividend. The latency floor in case 07 is the same figure Equilibrium publishes. The cases are load-bearing, not an appendix.

Case 07 is set in 2036. The record underneath it is verified and graded; only the year has not arrived yet.

That completes the seven cases.

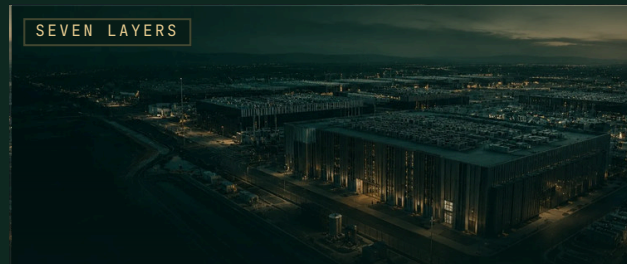
Ten market chapters, seven Strata layers and seven Sociotecnica cases. All of it maintained, all of it graded, all of it published in the open.



The markets

Every market chapter, each with its own instruments, ledger and named contributors.

Gulf	Malaysia
USA	Chile
Europe	Brazil
India	South Africa
Indonesia	Kenya, Morocco, Nigeria



Strata

The cross-cutting readings that turn ten chapters into one argument.

- 01 Conditions
- 02 Comparison
- 03 Survey
- 04 Equilibrium
- 05 Landfall
- 06 Capital
- 07 Conclusion



Sociotecnica, Edition 01

Politics and perception: who governs the build, who is winning the story, and whether the numbers hold.

- 01 The Infrastructure Prime Minister
- 02 Hosting the Backlash
- 03 The Wrong Numbers

ABOUT ENTELLIGENCIA

Open-source intelligence for the capital and infrastructure of growth. Nothing publishes until it is traceable to a primary source, every figure carries its grade, and announced is never presented as delivered.

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