

STRATA BRIEFS • EDITION 01 • LAYERS 01 TO 04

Strata

The layer above the markets. Ten chapters, read as one argument.

Before you compare the markets, change the question. Strata runs seven cross-cutting readings that turn the chapters into a thesis. This edition carries the first four: the lens that decides what a site is for, the league table across all ten, the room's own answer, and the evidence base beneath both.

01 • CONDITIONS

4 archetypes

One site is never right for all of them

02 • COMPARISON

10 × 6

Markets against dimensions

03 • SURVEY

90 leaders

Polled, and still fielding

04 • EQUILIBRIUM

7 instruments

Built from public data

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

Four layers • thirteen pages • Strata Edition 02 covers layers 05 to 07

Scan for the live report,
every instrument and
every source



Four layers, thirteen pages.

Strata sits above the ten market chapters. Where a chapter answers what is happening in one place, a layer answers what is true across all of them.

LAYER 01



Conditions

The lens

A site that scores perfectly for training can be categorically wrong for inference.

Archetypes	Four
Sites plotted	12
Framework	Contributed

LAYER 02



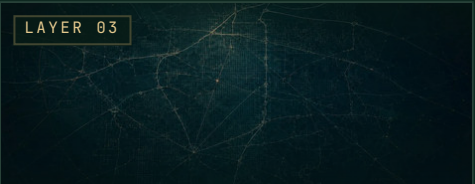
Comparison

The league table

One booming industry, ten very different places to build it.

Markets	Ten
Dimensions	Six
Lenses	Five

LAYER 03



Survey

The room, polled

Put to the people deciding the answer, and still fielding.

Leaders polled	90
Parts of the chain	Six
Status	Live to Dec 2026

LAYER 04



Equilibrium

The evidence base

Where demand, power and reality are weighed against one another.

Instruments	Seven
Sourcing	Public, graded
Funding	Independent

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.

Strata leans harder on **Contributed** than the market chapters do, because its frameworks are built with named practitioners.

HOW TO READ IT

Anything set in **gold** is a link. Layer titles, instrument names and every open prompt route to the live layer.

The archetype instrument, the positioning map, the survey and the seven Equilibrium readings are all interactive and cannot be printed. They are summarised and linked in full.

THE SEVEN LAYERS

- 01 to 04
- Conditions to Equilibrium
- This document
- 05
- Landfall
- The silicon
- 06
- Capital
- The money
- 07
- Conclusion
- The thesis

Strata Edition 02 carries the final three, then Sociogencia follows: people, politics and perception.

OPEN STRATA

Conditions

Before you compare the markets, change the question.

A site that scores perfectly for an AI training campus can be categorically wrong for an edge inference node, and the reverse. AI demand has fractured the market into four infrastructure archetypes, each with its own non-negotiable conditions. This is the lens to read every market in this report through.

ARCHETYPES

4

Each with its own disqualifiers

SITES PLOTTED

12

Where each archetype actually wins

THE DIVERGENCE

100 kW

The rack density that broke the checklist

THE FRAMEWORK

Contributed

Developed with the advisory board

READ THE FULL LAYER

Workload first, site second.

The same six dimensions decide every site, but their weight is set by the workload. Move into training and the power bar grows. Move into inference and edge, and connectivity does.

ARCHETYPE 01

Training campus

Power dominates

Wants firm power at scale, land to expand into and tolerance for distance from the user. Latency barely matters. The gate that kills it is grid connection.

Weighted toward power and land

ARCHETYPE 02

Inference hub

Connectivity dominates

Lives near the users and the data it serves. Wants interconnection density and metro proximity. The gate that kills it is latency to the customer base.

Weighted toward connectivity

ARCHETYPE 03

Edge node

Proximity dominates

Small, distributed and close to demand. Power is a constraint but not the binding one. The gate that kills it is the absence of a user base to sit beside.

Weighted toward proximity

ARCHETYPE 04

Sovereign platform

Jurisdiction dominates

Where the data has to sit is decided before anything else. Institutions and legal certainty outrank price. The gate that kills it is a regime nobody can underwrite.

Weighted toward institutions

One number broke the old checklist

RACK DENSITY AND THE COOLING CLIFF

100 kW per rack

Thirteen times a traditional enterprise rack

Cheap land, available fibre and a tax break used to qualify a site. Then rack power density climbed, and the cooling regime, the power distribution and the building itself all changed with it. The same rack footprint now spans a fifteen-fold range, and the two cooling thresholds are where the four archetypes split apart.



OPEN THE DIVERGENCE

Cheap land, available fibre and a tax break used to qualify a site. Then rack power density climbed, and the cooling regime, the power distribution and the building itself all changed with it. The same rack footprint now spans a fifteen-fold range, and the two cooling thresholds are where the four archetypes split apart. Indicative editorial weightings, applied consistently across all ten markets.

Stop building it like it is special.

CONTRIBUTED · THE DELIVERY SEAT

Global Infrastructure Partners, a BlackRock company
Formerly Microsoft and Meta

Nine files on how it actually gets built, and the reasoning under the workload-first framework. Thirty years of delivery, and two hyperscalers.

It is a shed with servers in it

01

His starting position, and it is deliberately deflating.

The competitor was cheaper, so he copied them

02

The most useful thing he says about method, because it is an admission.

Simplify, standardise, modularise

03

The three moves, in that order. He is clear the saving came from the building rather than from procurement.

You cannot outsource the vision

04

A caution aimed squarely at owners who believe that transferring delivery to a contractor transfers the risk with it.

A third of the gear, up front

05

The mechanic behind the schedule that nobody puts in the announcement.

The cost curve went the wrong way

06

Two numbers that frame the last decade of construction economics.

Sustainability has gone asymptotic

07

His answer on efficiency, and it is bleaker than the industry's.

What crypto knows that we do not

08

The place he thinks the industry should be looking, and is not.

The two-times cost spread

09

The number the whole framework exists to close: the same building, done two ways.

LIFT THE LID

The framework itself runs in full on the live layer. This is contributed analysis: it is graded and sourced like the rest of the report, and where a claim rests on his own experience rather than the public record it is graded Contributed and stays there. He is the author of the workload-first framework the whole layer is built on, which is worth knowing while reading it.

Comparison

All ten markets, side by side.

One booming industry, ten very different places to build it. Every market in the series, scored on the six things that decide where the AI build actually lands. Filter, re-weight and compare: the league table changes with the question you ask.

MARKETS	DIMENSIONS	LENSES	TIERS
10	6	5	3
Every chapter in the series	Scored 0 to 10, consistently	Re-weight and the ranking moves	Overlaid on the index

READ THE FULL LAYER

So which is the next hotspot? It depends what you need first.

A ranked list hides the trade-offs. The layer plots the ten on any two dimensions at once, so you can see the clusters, and who wins for opposite reasons.

INSTRUMENT 01

The readiness index

Ten markets, six dimensions, one shape each. Pick a market to read its shape against the field, switch the dimension to re-rank the bars, or filter by tier.

What it answers	Who leads, on what
What it hides	The trade-offs

INSTRUMENT 02

The positioning map

Where each market sits on any two forces. Dashed lines mark the field average, so a market's quadrant is legible at a glance.

What it answers	Who wins, and why
The finding	Opposite reasons, same tier

INSTRUMENT 03

The shapes, side by side

Every market as its own signature: skyline, grid and flag, with the readiness profile drawn over the top. The bright shape is the market, the faint one the field.

What it answers	The character of a market
Read it as	A signature, not a score

The six dimensions, applied to all ten

INDICATIVE EDITORIAL SCORING, 0 TO 10

Capital committed	Can it be financed
-------------------	--------------------

Clean power	Can it be energised
-------------	---------------------

Connectivity	Can it be reached
--------------	-------------------

Demand floor	Will it be filled
--------------	-------------------

Permission	Will it be allowed
------------	--------------------

Delivered vs announced	Does it actually get built
------------------------	----------------------------

Every score is drawn from the per-chapter readiness read, so the league table and the chapters cannot drift apart. The last dimension is the one that separates the field: several markets score highly on the first five and then fall on delivery.

OPEN THE MAP

Indicative editorial scoring, drawn from the per-chapter readiness reads and published so the weighting can be argued with.

The Survey

Where does the next hotspot land? Ask the room.

A live artefact, not a finished poll. Put to the people deciding the answer, the ninety leaders across ten markets who power, fund, permit and build it, and fielded continuously, with new names and confirmed responses added as they land.

LEADERS POLLED	PARTS OF THE CHAIN	MARKETS	STATUS
90	6	10	Live
Across ten markets	Power, capital, permitting, build	Every chapter in the series	Fielding June to December 2026

READ THE FULL LAYER

Equilibrium

Where demand, power and reality are weighed
against one another.

An independent read of the global build-out, assembled from public data into live instruments and updated as it moves.
Every reading is taken first in the United States, the sharpest case, then extended to every major market.

INSTRUMENTS

7

Each built from public data

SOURCING

Public

Graded, and updated as it moves

FUNDING

Independent

No sponsor sits behind a reading

METHOD

Data journalism

Read first in the US, then extended

READ THE FULL LAYER

Strata layer 04 of 07.
Seven live readings, each with its own sourcing, open at entelligencia.report

Seven readings of the build-out.

\$9.3bn passed to customers in

one year

Who pays for the build

The ratepayer pass-through in the largest US grid, quantified honestly.

~0.4% of US water withdrawals

Small in water, loud in power

Data-centre water and energy set against every other sector that uses them.

2.3% of the queue is real

The gigawatts that will never connect

Announced against energised, read straight from the interconnection queue.

6 yrs average queue to power

How long until it draws power

Months from securing a site to drawing power, by market and by route.

230 ms New York to

Singapore

The latency no one can beat

The geographic floor that decides which workloads a site can serve.

8 TWh wasted in Texas in

2024

Where the next campus should go

Stranded power mapped against build readiness, to find the frontier first.

6 audiences, evidence-linked

The moves, by who you are

Six audiences, every recommendation linked back to the evidence above.

Each built from public data and updated as it moves. Six are data journalism. The seventh turns the evidence into recommendations, and links every one of them back to the reading it came from.

OPEN THE READINGS

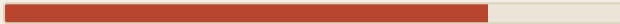
The three that most often surprise a reader: only 2.3 per cent of the interconnection queue is real, data centres are small in water and loud in power rather than the reverse, and the latency floor between New York and Singapore is a fact of geography that no amount of capital moves.

Who pays for the build.

The legitimacy ledger. Across this report the political constraint keeps resolving to one question, and it is not environmental. It is who carries the cost.

PASSED TO CUSTOMERS

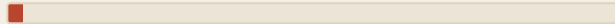
9.3 USD bn in one year



In the largest US grid. This is the number that turns a local planning fight into a national political one.

QUEUE THAT IS REAL

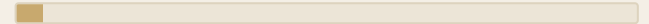
2.3 per cent



Announced against energised, read straight from the interconnection queue. Almost everything in it will never connect.

US WATER WITHDRAWALS

0.4 per cent



Small in water, loud in power. The public argument and the physical footprint are not pointing at the same thing.

The four remaining readings

EACH READ FIRST IN THE US, THEN EXTENDED

6 yrs

How long until it draws power

Months from securing a site to drawing power, by market and by route.

230 ms

The latency no one can beat

New York to Singapore. The geographic floor that decides which workloads a site can serve.

8 TWh

Where the next campus should go

Wasted in Texas in 2024. Stranded power mapped against build readiness, to find the frontier first.

6 audiences

The moves, by who you are

Every recommendation linked back to the evidence it came from.

Why this layer is the evidence base

Every market chapter in this report ends up arguing about power, permission or cost. Equilibrium is where those arguments are settled against public data rather than against each other, and it is why the chapters can be short: the working is here.

Independent by construction. No sponsor sits behind a reading, and each one is assembled from public data with its sourcing attached. Where a figure is modelled, the layer says so and shows the method.

OPEN THE LEDGER

Data journalism • assembled from public grid, utility and regulator data, and updated as it moves.

Four layers, one discipline.

Read in sequence, these four do something the chapters cannot. They set the question, rank the field against it, ask the room, and then check both against the record.

Layer	WHAT IT ASKS	WHAT IT CHANGES
01 Conditions	What is this site actually for?	Stops a market being scored against the wrong workload
02 Comparison	Who leads, and on what?	Shows who wins for opposite reasons in the same tier
03 Survey	What does the room think?	Sets the desk's read against ninety practitioners
04 Equilibrium	What does the public record say?	Settles the arguments against data rather than opinion

The sequence matters

Conditions comes first for a reason. Rank ten markets before deciding what a site is for, and the ranking is meaningless: the Nordics win for training and lose for inference, and a single league table cannot hold both.

Two of the four are contributed

The Conditions framework was built with Doug Mouton, and the Survey is the room's own answer rather than the desk's. Strata leans harder on named practitioners than the market chapters do, and it says so on every page.

What comes next

Strata Edition 02 carries Landfall on the silicon, Capital on the money, and Conclusion, which is where the report finally answers its own title question.

THE REASON STRATA EXISTS

Ten answers are not an answer.

A market report that stops at ten chapters leaves the reader to do the synthesis. Strata does it in the open, with the weighting published so it can be argued with, and with the practitioners who built the frameworks named on the page. The chapters describe ten places. The layers say what is true across all of them.

07

Layers in total
Four in this edition

Indicative editorial scoring throughout, applied consistently across all ten markets and published so the weighting can be argued with.

Strata sits above ten chapters.

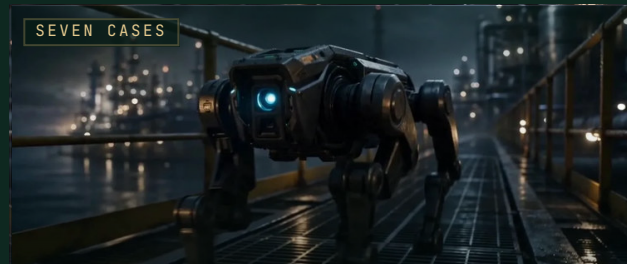
The layers are only useful because the market chapters underneath them are. All of it open, all of it maintained, none of it gated.



The markets

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

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



Sociogencia

Original analysis. Longer reads that pressure-test the thesis, from robotics fleets to the politics of consent.

- 1 The Infrastructure Prime Minister
- 2 Losing the Room
- 3 The Wrong Numbers
- 4 The Continuum
- 5 The Memory Supercycle
- 6 The Body Electric
- 7 The Talent Crunch



Strata, Edition 02

The final three layers, and the point at which the report answers its own title question.

05 Landfall	The silicon
06 Capital	The money
07 Conclusion	The thesis

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.

ADD TO THE ARTEFACT

The Survey is live and fielding to December 2026. If you build, fund, permit or power this, add your read. Nothing publishes until you have seen it.

ADD YOUR READ



FREE TO SHARE

Pass it on whole and with attribution. The full report stays open to anyone at entelligencia.report.

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