

# ИИ: главная интрига 2025 г.

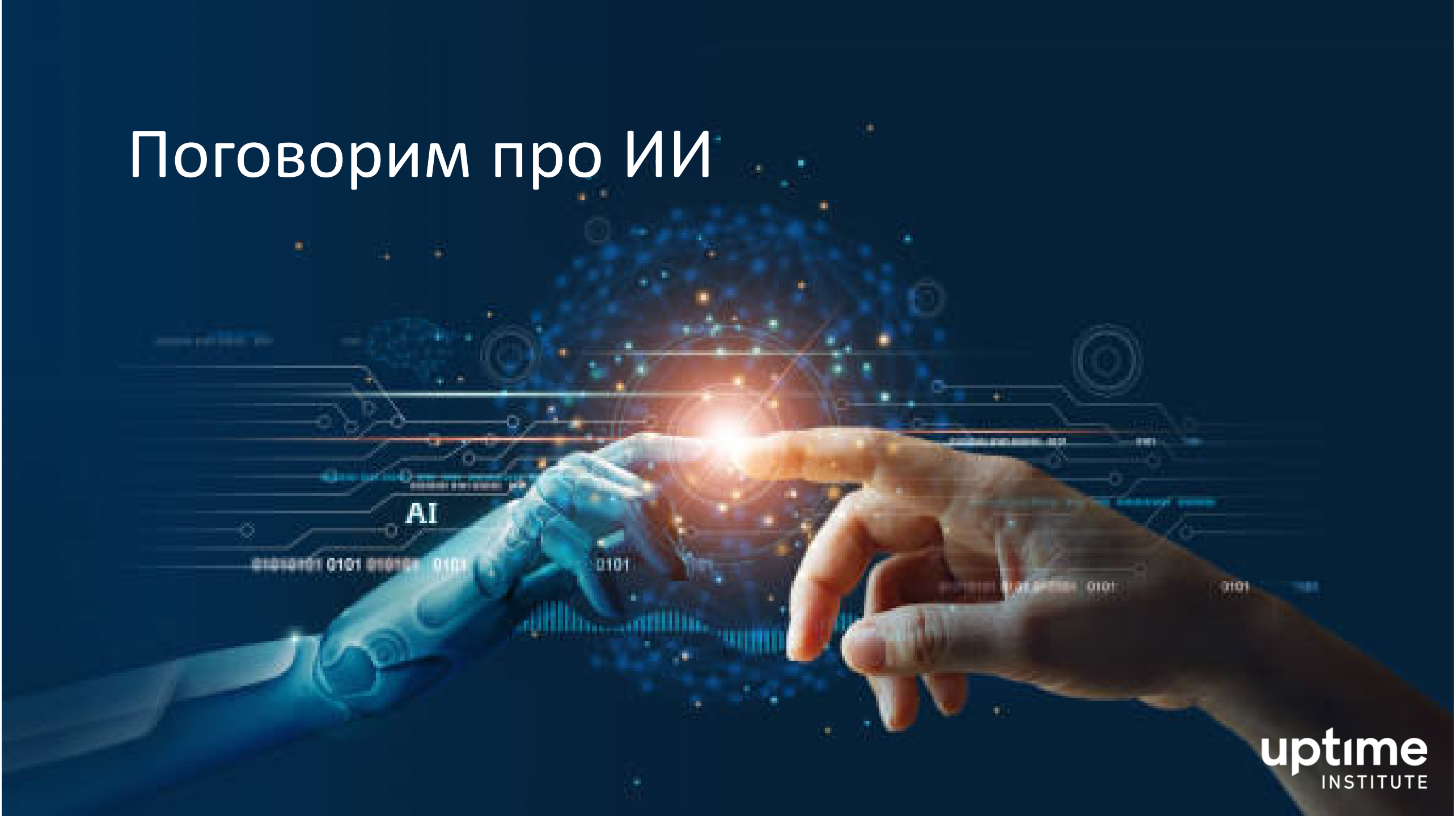
Алматы, 18 февраля 2025

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Алексей Солодовников  
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Uptime Institute

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INTELLIGENCE

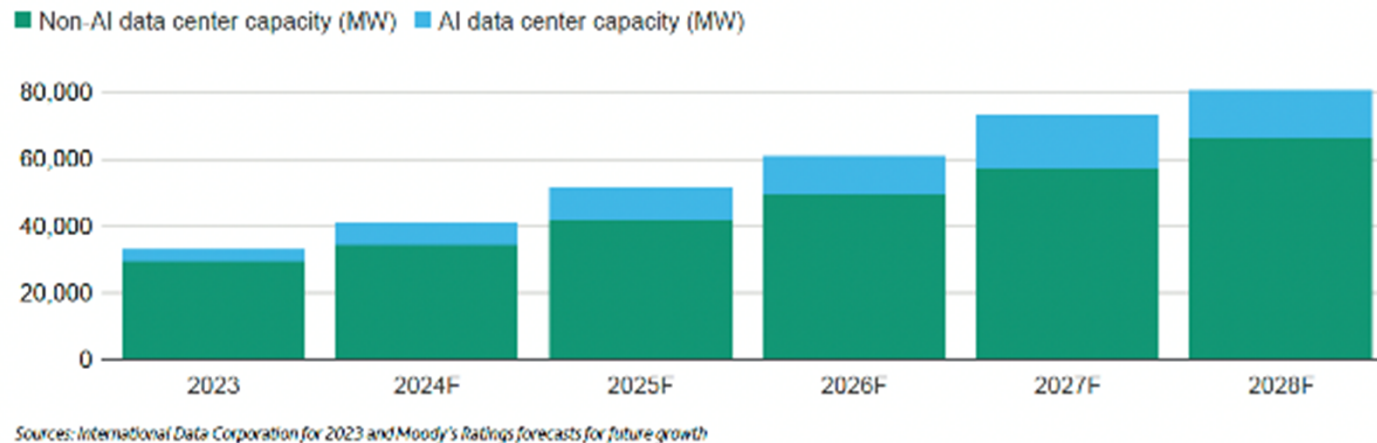
# Поговорим про ИИ



## ИИ: главная интрига 2025 г.

Нужны ли десятки миллиардов долларов, десятки ГВт электроэнергии, стойки по 150+ кВт и жидкостное охлаждение, или можно без всего этого обойтись?...”

## Глобальный ВЗРЫВ в строительстве ЦОДов (опять)



- Объявлены более 180 (!) ЦОДов мощностью свыше 100 МВт
- DC power demand to rise to 800-1000 TWh by 2027 (?)
- Гиперскейлеры тратят свыше \$50 Млрд в квартал на инфраструктуру
- Очень высокий спрос на электроэнергию, землю, кадры, сети передачи данных, M&E и IT (GPU)

# 2024: >100MW Datacenter campuses

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- **62,891 МВт** добавочного энергопотребления
    - = **275 ТВт-ч** при 50% загрузке
    - = **+2%** от текущего общемирового потребления
  - **\$450 млрд** оценочная стоимость
- 



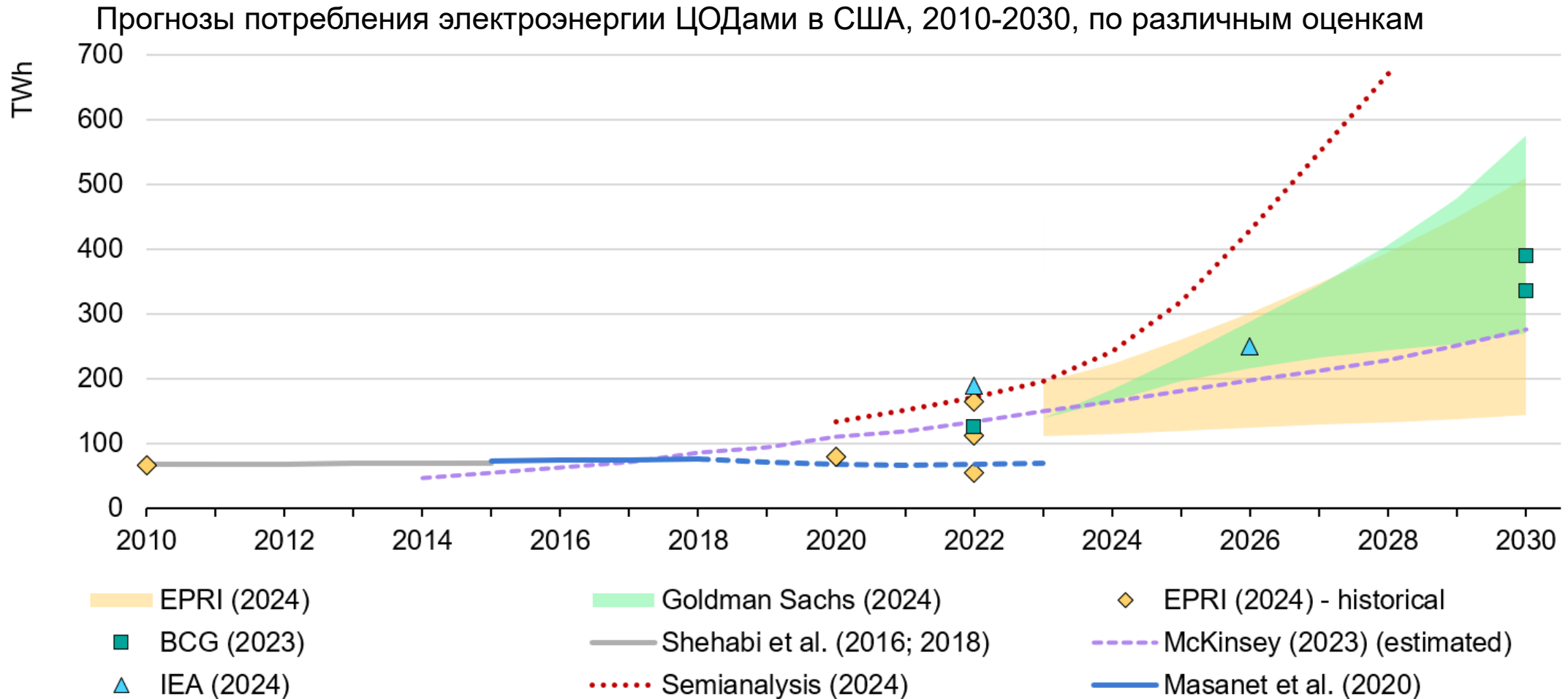
# Планы по регионам (2024)

Регион	Мощность МВт	Проектов	Траты (в миллионах \$)	Среднее МВт
EMEA	11,923	26	93,685	459
APAC	10,112	21	50,500	636
LATAM	5,350	4	50,500	1,338
North America	35,506	68	260,010	522
<b>Всего 2024</b>	<b>62,891</b>	<b>119</b>	<b>454,695</b>	<b>528</b>
2021-23	355%	259%	625%	115%
2021-23 data	17,691	46	72,718	461

Uptime estimates



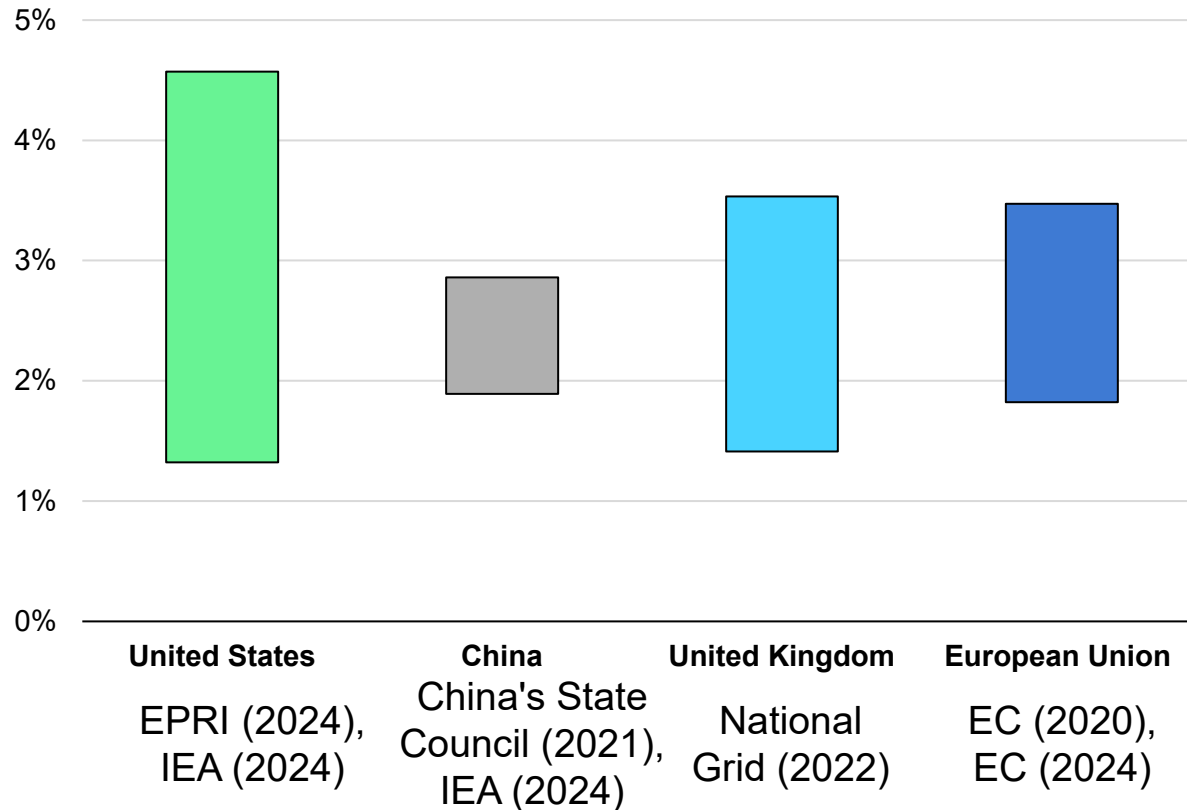
# Прогнозы энергопотребления ЦОДов разнятся кратно



Неопределённости в части спроса, технологического прогресса, роста эффективности, вкупе с разворачиванием площадок под ИИ делают любые прогнозы неточными >

# По мере нарастания дефицита, необходим точный учёт

Доля энергопотребления ЦОДов в различных регионах, по разным оценкам





# История «пузырей»



**Table 1.** Historical episodes identified as bubbles

Bubble	Location	Years	Asset	Post-bubble financial crisis
Tulipmania	Netherlands	1636-37	Tulip bulbs and tulip bulb contracts	No
Mississippi Bubble	France	1719-20	Mississippi Company stocks	Yes
South Sea Bubble	UK	1719-20	Company stocks (including stocks of the South Sea Company)	No
Canal Mania	UK	1793	Canal stocks	No
First emerging market bubble	UK	1824-26	Company and mining stocks	Yes
Railway Mania	UK	1844-46	Railway stocks	No
Australian Land Boom	Australia	1886-93	Company stocks and real estate	Yes
Bicycle & Beer Mania	UK	1895-98	Stocks of bicycle and brewing companies	No
Roaring Twenties	USA	1920-31	Stocks of new technology companies	Yes
Scandinavian Housing Bubble	Sweden, Norway, and Finland	1982-92	Real estate	Yes
The Taiwan Bubble	Taiwan	1982-92	Company stocks	No
Japanese Bubble	Japan	1985-92	Company stocks and real estate	Yes
Dotcom Bubble	USA	1995-2001	New technology stocks	No
Global Housing Bubble	USA, UK, Ireland, Spain	2001-2008	Real estate	Yes
The Chinese Bubbles	China	2007, 2015	Company stocks	No

# История «пузырей»

## The "Dot-Com" Bubble



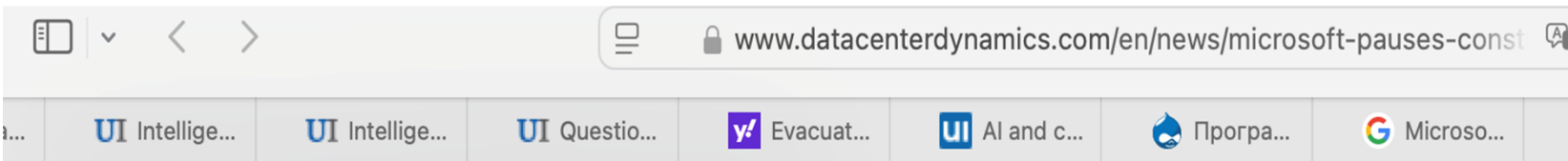
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**Привет, я DeerSeek.**

Чем могу помочь вам сегодня?



# Microsoft 'pauses construction' on part of data center site in Mount Pleasant, Wisconsin

Company evaluating "changes in technology"

January 03, 2025 By: Matthew Gooding 1 Comment



Microsoft has paused construction on parts of its \$3.3 billion data center campus in Mount Pleasant, Wisconsin.

The company has permission to develop up to 1,000 acres of land in the village, but said that while it is pressing ahead with the first phase of the plan, it is reviewing the rest of its build-out.

**Microsoft explains Wisconsin construction pause**

Microsoft said: "We have paused early construction work for this second phase while we evaluate scope and recent changes in technology and consider how this might impact the design of our facilities."



# Выводы и предсказания

2025: год великого перелома

ChatGPT vs. DeepSeek

12...15...25 или 120...200...500+ кВт/стойку?

каков будет возврат инвестиций?..

и вклад в реальную экономику?..

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Спасибо за внимание  
Вопросы?

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