

EQT Introduces AI Infrastructure Strategy to Help Build the Foundation of the AI Economy

- Strategy targets generational infrastructure investment needs, driven by AI and requiring trillions in global investment
- Fully seeded by EdgeConneX and supported by EQT's global infrastructure platform with more than \$100 billion in digital and energy assets

EQT's AI Infrastructure strategy will focus on building the physical infrastructure underpinning artificial intelligence. The strategy will leverage EQT Infrastructure's deep experience and leadership in digital and energy infrastructure and be seeded by global data center developer and operator EdgeConneX. EQT Infrastructure portfolio companies will continue to work with all major hyperscalers, chip designers, AI native companies and neoclouds to drive investment into this crucial part of the next generation of AI.

AI is driving a new industrial era. Global demand for data centers is accelerating, with AI expected to significantly increase compute needs and power consumption. Industry estimates suggest that around \$4 trillion will be invested in data centers and energy infrastructure over the next five years to meet this demand.¹ At the same time, supply constraints—particularly around access to power—are emerging as a key bottleneck, reinforcing the need for coordinated investment across digital and energy infrastructure.

EQT's AI Infrastructure strategy is designed to address this significant demand by leveraging its deep expertise across the entire spectrum of infrastructure and enhancing collaboration across its infrastructure portfolio. The strategy is fully seeded by EQT Infrastructure portfolio company EdgeConneX, enabling EQT to continue supporting its tremendous growth trajectory, and it will build on EQT's broader platform, which includes more than \$100 billion in digital and energy infrastructure assets globally. With an energy pipeline of over 100 gigawatts, more than 90 data centers, and 29 million miles of fiber network deployed globally, EQT's portfolio can provide integrated, end-to-end solutions to support customers as they scale AI workloads. EQT AI Infrastructure is led globally by Jan Vesely and Christoph Balzer.

Jan Vesely, Partner at EQT, said: "Infrastructure is now the defining factor for AI's continued expansion. Integrated solutions are needed across chips, data centers, energy and connectivity. EQT's Infrastructure funds own the critical infrastructure needed for the accelerated deployment of AI, so we are able to roll out new AI factories and data centers rapidly and efficiently while delivering additional energy to serve these AI needs. We look forward to collaborating across our portfolio to support the development of this critical infrastructure and help lay the foundation on which the AI economy is being built."

EdgeConneX seeds the EQT AI Infrastructure Strategy

EdgeConneX provides the strategy with an immediate, large-scale platform from which to execute on the AI infrastructure opportunity. EQT AI Infrastructure will leverage EdgeConneX's presence across all major data center markets in North America, Europe, Asia Pacific and Latin America to roll out additional infrastructure worldwide. Since EQT's acquisition in 2020, EdgeConneX has scaled its

¹*Utilities Must Reinvent Themselves to Harness the AI-Driven Data Center Boom*, Bain & Company, October 2024



capacity by nearly 20X and plans to develop more than 10 gigawatts of additional data centers over the coming years.

Randy Brouckman, EdgeConneX CEO, said: “EdgeConneX has always focused on our customers and their global needs. From hyperlocal to hyperscale, we have always delivered a solution predicated on giving the customer what they want, where they want and when they want it. Leveraging EQT’s capital and portfolio of energy and network infrastructure means that we can deliver a true end-to-end gigascale solution that enables our customer’s AI requirements globally.”

Contact

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About EQT

EQT is a purpose-driven global investment organization with EUR 270 billion in total assets under management (EUR 141 billion in fee-generating assets under management) as of 31 December 2025, within two business segments – Private Capital and Real Assets. EQT owns portfolio companies and assets in Europe, Asia Pacific and the Americas and supports them in achieving sustainable growth, operational excellence and market leadership.

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