SERCXI DISPLACEMENT INDEX

Nine out of Nine

Data centre leadership across APAC, EMEA and the GCC. The first quarter in the Index’s history to register maximum displacement intensity in all three corridors at once.

9 / 9	ALL CORRIDORS
$20B+	2026 PIPELINE
Aug 2026	EU AI ACT BINDING
AED 2.4M	GCC CISO PACKAGE

Q3 2026 · CROSS-CORRIDOR BRIEFING · PREPARED BY SERCXI

Q3 2026 · DATA CENTRE SECTOR

The first simultaneous displacement

All three corridors now read 9/9 — Displaced. Each arrived there by a different route. The outcome is identical: capacity is being commissioned faster than leadership can be recruited, onboarded and made effective.

9 / 9 ALL CORRIDORS	6 to 9 TWO QUARTERS
~21 GW EMEA CAPACITY	17% EU POWER CAGR TO 2031
€310k+ EMEA VP ENG. BASE	174+ GCC PROJECTS

EXECUTIVE SUMMARY

- APAC: power allocation, not capital, now sets the order of capacity additions. Oracle abandoned a 150 MW Singapore project after two years of failed grid negotiation.
- EMEA: EU AI Act high-risk obligations became legally binding on 2 August 2026; UK CNI designation moves resilience to board level.
- GCC: state-directed demand. $5–7bn of AI-specific data centre investment lands inside a single year, led by Stargate UAE and HUMAIN.
- Universal scarcity: Head of Energy & Sustainability, Head of Country / GM, and CISO — in all three corridors simultaneously.

CORRIDOR 01 · APAC

Power-constrained reordering

Index reading 9/9 — Displaced. Trajectory 6/9 to 9/9 in two quarters.

MARKET DATA

- Record $11.6bn APAC data centre investment in 2025 (CBRE).
- ~2 GW added annually, doubling regional capacity within five years (Bank of America).
- Power demand 320 TWh (2024) to 780 TWh (2030), a 165% increase (Turner & Townsend).
- Construction cost spread $7.9M/MW (Taiwan) to $19.2M/MW (Japan) — 2.4x variance (Cushman & Wakefield 2026).
- Johor: 53% YoY live capacity growth, the largest in APAC (CBRE).
- Thailand: $880m green loan, the largest data centre financing in Thai history.
- Indonesia: Microsoft is building its own power plants rather than waiting for the grid.

STRUCTURAL VECTORS

- **Power model transition.** Hydrogen pilots scaling 3 MW toward 100 MW, SMR discussions, purpose-built storage manufacturing. PPA structuring and grid negotiation expertise is now mission-critical.
- **AI-ready infrastructure gap.** Pre-AI facilities face obsolescence. VP and Director talent with liquid cooling and high-density rack experience is acutely scarce.
- **Geographic dispersal.** Capacity moving from Singapore and Japan toward Malaysia, Thailand, India and Indonesia — markets with no local leadership bench.

Compensation drift. Escalating for Country Head and Head of Engineering roles in Malaysia, Thailand and Indonesia, where incumbent pools are shallow and cross-border relocation is required.

CORRIDOR 02 · EMEA

Regulation as the trigger

Index reading 9/9 — Displaced. Trajectory 6/9 to 9/9 in two quarters.

MARKET DATA

— Operational capacity ~21 GW at end-2024, +9% YoY; pipeline growth +16% (Cushman & Wakefield).

— FLAP-D markets account for ~785 MW operational — 8.3% of the EMEA total.

— European IT power demand forecast at 17% CAGR through 2031 (EUDCA 2026).

— Colocation and hyperscale now provide more than two-thirds of Europe's IT power.

— European investment expected to exceed €100bn by 2030 (CSG Talent).

REGULATORY TRIGGERS

— **EU AI Act.** High-risk obligations binding from 2 August 2026. The AI Office and national authorities hold enforcement powers: documentation requests, on-site inspections, fines.

— **UK CNI designation.** Data centres designated Critical National Infrastructure in September 2024; the Cyber Security and Resilience (NIS) Bill classifies them as essential services under Ofcom regulation.

— **UK NSIP regime.** Planning streamlined, environmental and community engagement parameters imposed.

GEOGRAPHIC DYNAMICS

— **London.** Leading EMEA market (DC Byte 2026). CNI status brings political backing and compliance overhead in equal measure.

— **Frankfurt.** Power constraints push new builds to the urban periphery; the core-city grid cannot support new hyperscale demand.

— **Amsterdam.** Strong connectivity and power mix, but expansion must be matched with renewable sourcing.

— **Dublin.** Growth model under pressure; constraints likely to echo Singapore.

— **Nordics.** Helsinki and peers gaining attention as power-secure alternatives.

STRUCTURAL VECTORS

— **Compliance leadership.** The intersection of data centre operations and AI regulation barely existed as a role definition twelve months ago.

— **Power and sustainability.** Cooling innovation and renewable contracting are now strategic decisions, not operational ones.

— **Security and resilience.** CISO and Head of Security roles now carry national infrastructure accountability.

€310k+	Aug 2026
VP ENG. BASE	ENFORCEMENT LIVE

CORRIDOR 03 · GCC

State-directed displacement

Index reading 9/9 — Displaced. Trajectory 6/9 to 9/9 in two quarters.

MARKET DATA

- GCC market $3.48bn (2024) to $9.49bn (2030), CAGR ~18.2% (Arizton).
- UAE alone $2.38bn (2025) to $6.70bn (2031), CAGR 18.8% (Arizton).
- AI-focused investment of $5–7bn expected in 2026 (Analysys Mason).
- Saudi Arabia projected at 41.4% of GCC power capacity share by 2031.
- Saudi Arabia and the UAE together hold over 75% of GCC rack capacity.
- ~$15.7bn in construction contracts awarded across 2017–2025.

FLAGSHIP PROJECTS

- **Stargate UAE.** G42, OpenAI, Oracle, NVIDIA, Cisco and SoftBank.
- **Microsoft UAE.** $7.9bn across 2026–2029 via Khazna Data Centers.
- **HUMAIN with AirTrunk.** $3bn to build AI data centres in Saudi Arabia.
- **center3.** Multi-billion capacity expansion through 2030.
- **Microsoft, ADNOC and Masdar.** Renewable supply for UAE facilities.

STRUCTURAL VECTORS

- **Sovereign AI strategy.** Where APAC and EMEA displacement is market-driven, GCC displacement is state-directed — Vision 2030 and national AI strategies create top-down demand.
- **Energy advantage as talent magnet.** Abundant power and capital attract operators, but the pool with Middle East operating experience remains thin.
- **Security criticality.** Cyber expertise, clearance potential and data centre operational knowledge form the scarcest intersection in the global market.

AED 2.4M
GCC CISO PACKAGE

174+
PROJECTS TRACKED

Compensation drift. AED 2.4M median total package for GCC CISO mandates with critical-national-infrastructure exposure — the premium for security-cleared, regionally fluent leadership.

SYNTHESIS

Three roles, three corridors

The triggers differ — regulatory in EMEA, power-driven reordering in APAC, sovereign investment in the GCC — but the outcome converges. Operators cannot commission capacity without the leadership to govern it, and the talent pool is not expanding at the rate of the infrastructure.

ROLE	APAC	EMEA	GCC
Head of Energy & Sustainability	PPA structuring, hydrogen pilots	EU mandates, renewable sourcing	Sovereign JVs (ADNOC, Masdar)
Head of Country / GM	Emerging markets (MY, TH, ID)	Peripheral expansion, Nordics	New entry (Riyadh, Doha)
CISO / Head of Security	Operational security at scale	UK CNI, EU AI Act	National clearance

RECOMMENDATIONS FOR OPERATORS

— **Begin search before construction commences.** The gap between commissioning and leadership onboarding is now the single greatest operational risk. A ninety-day delay can mean stranded capacity.

— **Prioritise compliance-fluent leadership in EMEA.** The AI Act has created a binary market. This is a hiring problem, not a training problem.

— **Treat the GCC as a distinct talent market.** Hyperscale experience, regional fluency and clearance potential together cannot be sourced from generic databases.

— **Plan for cross-corridor migration.** Operators who build credible cross-regional career propositions will win the scarce talent that exists.

SOURCES

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· EUDCA State of European Data Centres 2026
· DC Byte Global Index Report 2026
· Analysys Mason AI Investment Predictions 2026 (GCC)
· Arizton GCC & UAE Data Center Market Reports
· GlobalData GCC Data Centre Projects Market 2026
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· EUR-Lex Regulation (EU) 2024/1689 (AI Act)
· UK Government: Cyber Security and Resilience (NIS) Bill; CNI designation

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