

Macro Roundup Article

Headline: [Microsoft Infrastructure - AI & CPU Custom Silicon Maia 100, Athena, Cobalt 100](#)

Article Link: <https://www.semianalysis.com/p/microsoft-infrastructure-ai-and-cpu>

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Tweet: Microsoft is spending at least \$50bn annually on data centers going forward to power its AI push. @dylan522p notes this is “the largest infrastructure buildout that humanity has ever seen.”

Summary: Microsoft is currently conducting the largest infrastructure buildout that humanity has ever seen. While that may seem like hyperbole, look at the annual spend of mega projects such as nationwide rail networks, dams, or even space programs such as the Apollo moon landings, and they all pale in comparison to the >\$50 billion annual spend on datacenters Microsoft has penned in for 2024 and beyond. This infrastructure buildout is aimed squarely at accelerating the path to AGI and bringing the intelligence of generative AI to every facet of life from productivity applications to leisure. Related: The Growing Energy Footprint of Artificial Intelligence and The Race of the AI Labs Heats Up and Will A.I. Transform the Economy, and if So, How?

Primary Topic: Innovation/Research

Topics: Database, Innovation/Research, Investment, Op-Ed/Blog Post, Productivity, Weekly

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