

# Packet CEO Lunch Takeaways

By NSR Team | October 4, 2019

We hosted a lunch with Zac Smith, CEO of Packet, yesterday. Packet is a micro edge data center company that provides bare-metal servers for enterprise customers. The rise of micro edge data centers has important implications for towers, data centers, and carriers. For the towers, we came away thinking that micro edge data centers could drive upside, though the size of the opportunity remains opaque and likely immaterial to financials over the next several years. For data centers, Packet's views reinforce our preference for Equinix over the wholesale players. For carriers, Packet's deployments with Sprint, along with the proposal they submitted for Dish's network build, suggests there is upside for carriers to deploy services for enterprises at micro edge locations.

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