



Update on UK Data Centre Market
LINX119 May 2023



Tim Anker
Founder & Director Colo-X



20 Years of London Colocation
LINX105 May 2019

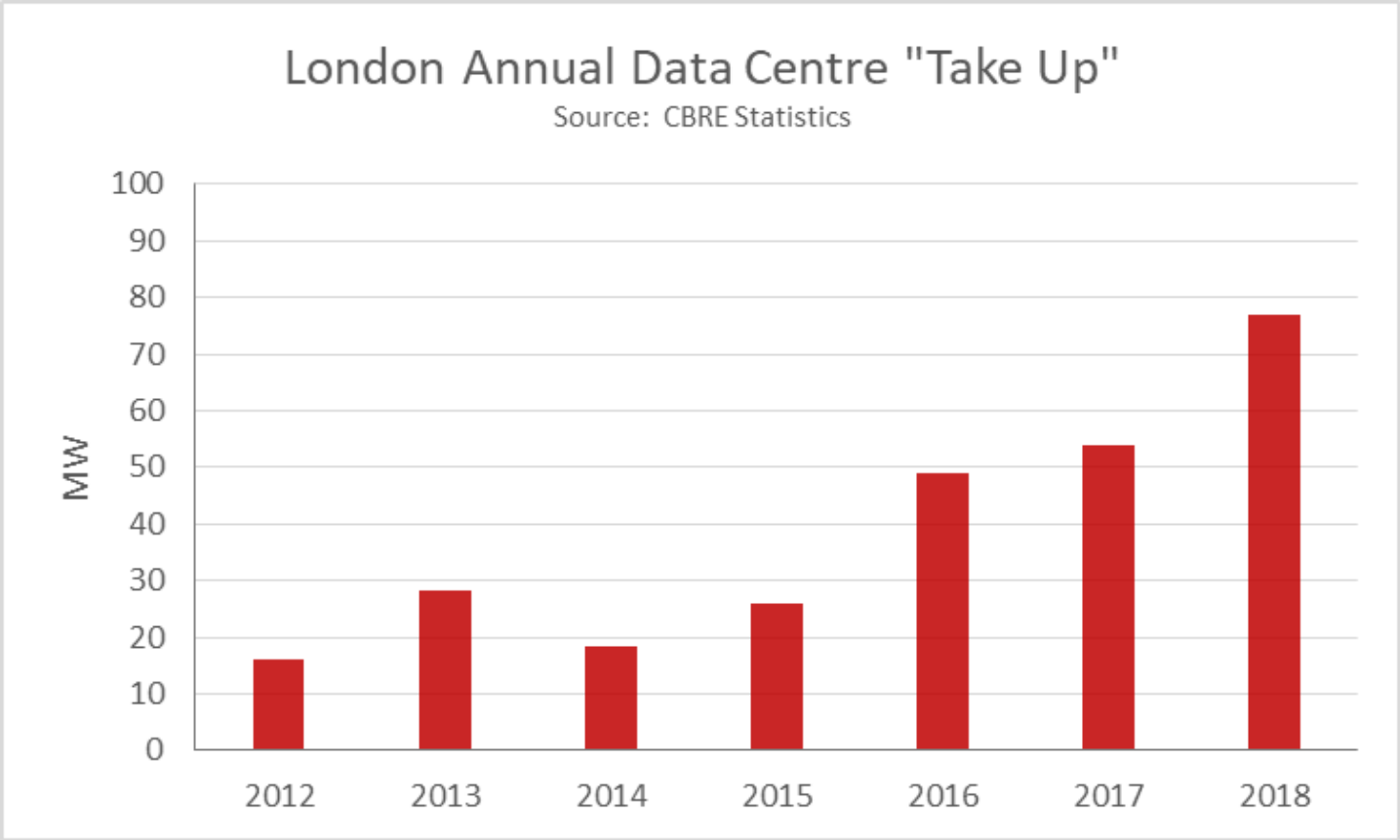


Tim Anker
Founder & Director Colo-X
Director Amito

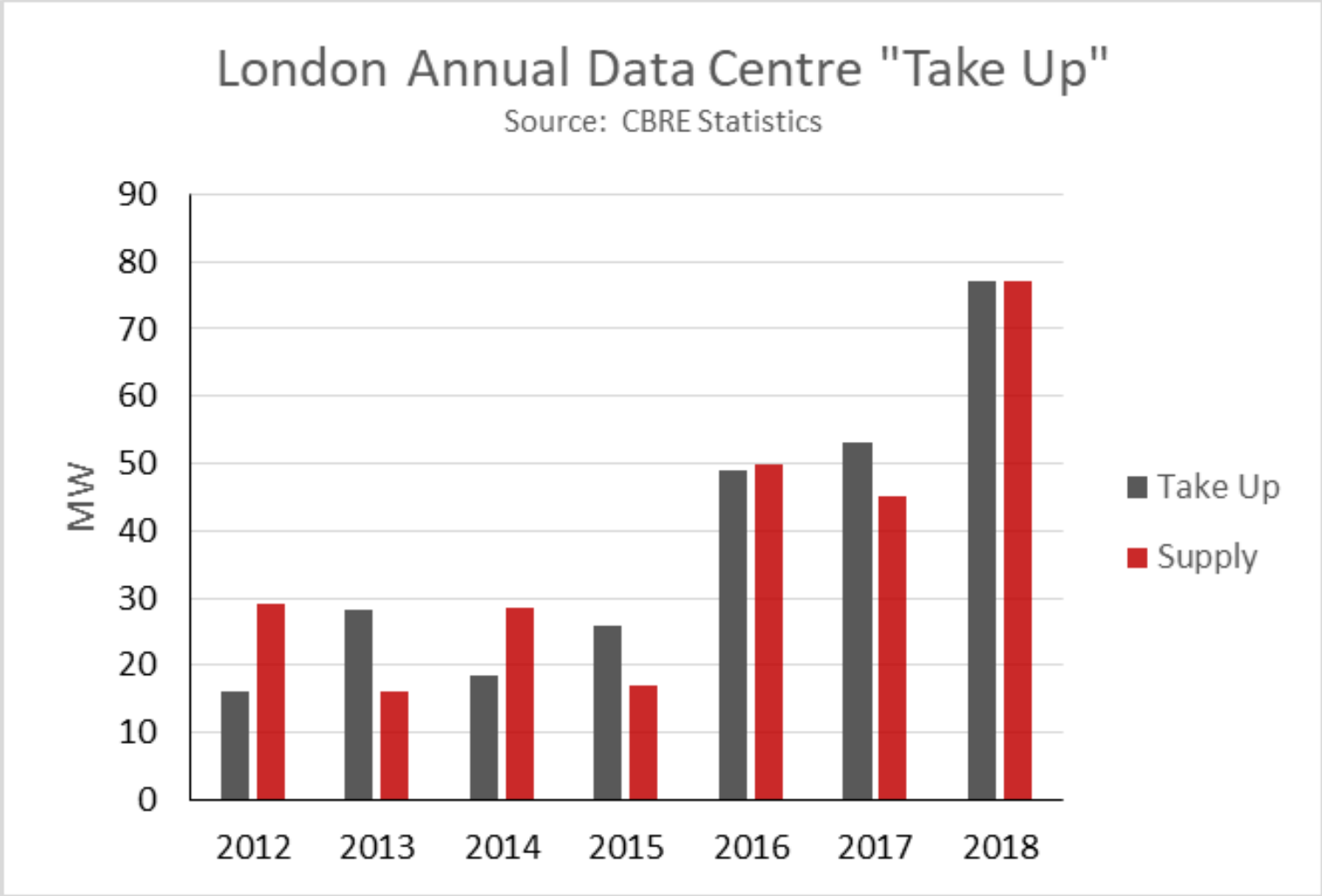
Docklands 20 years ago

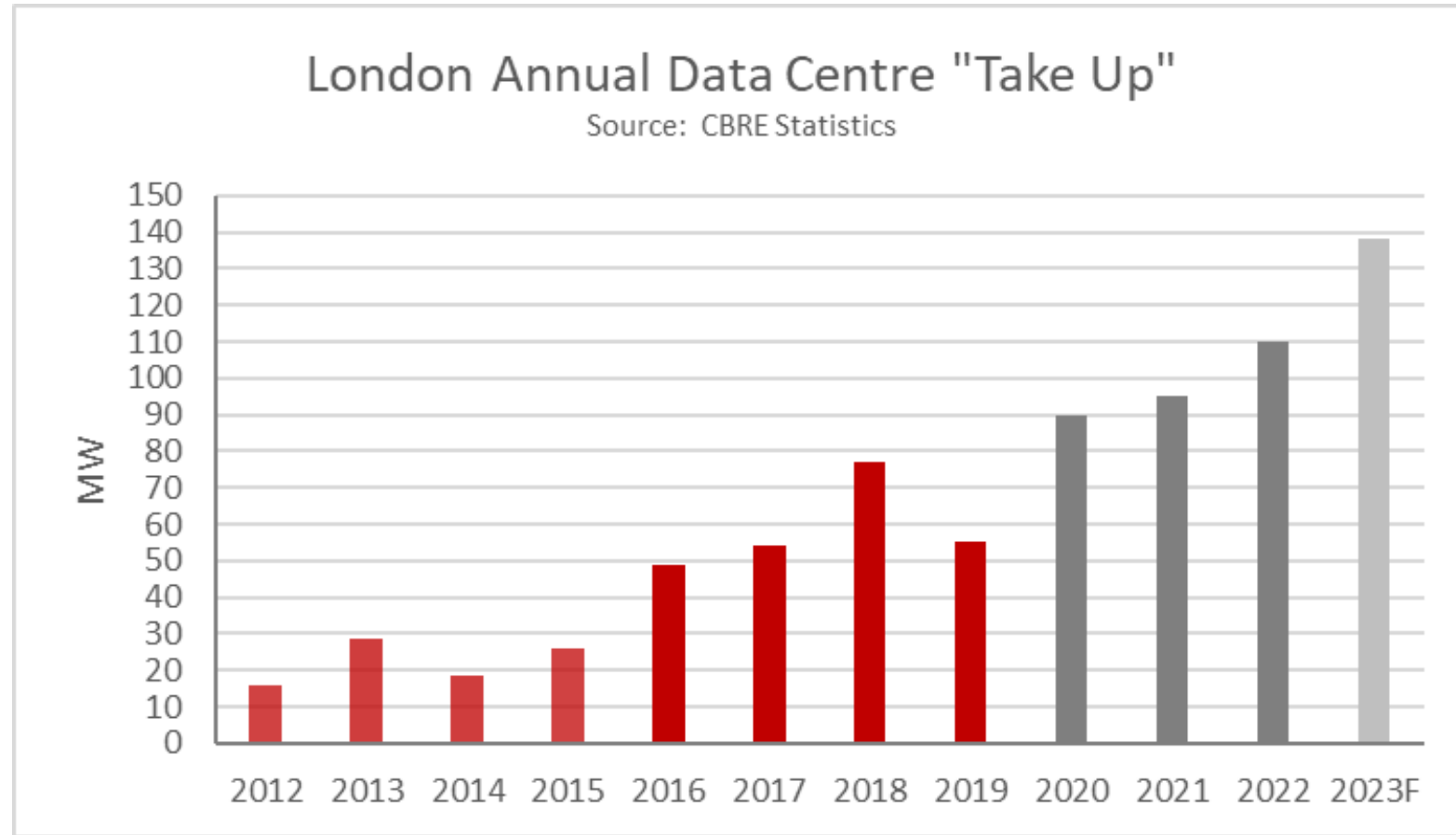


View in 2019: Recent changes – since 2015

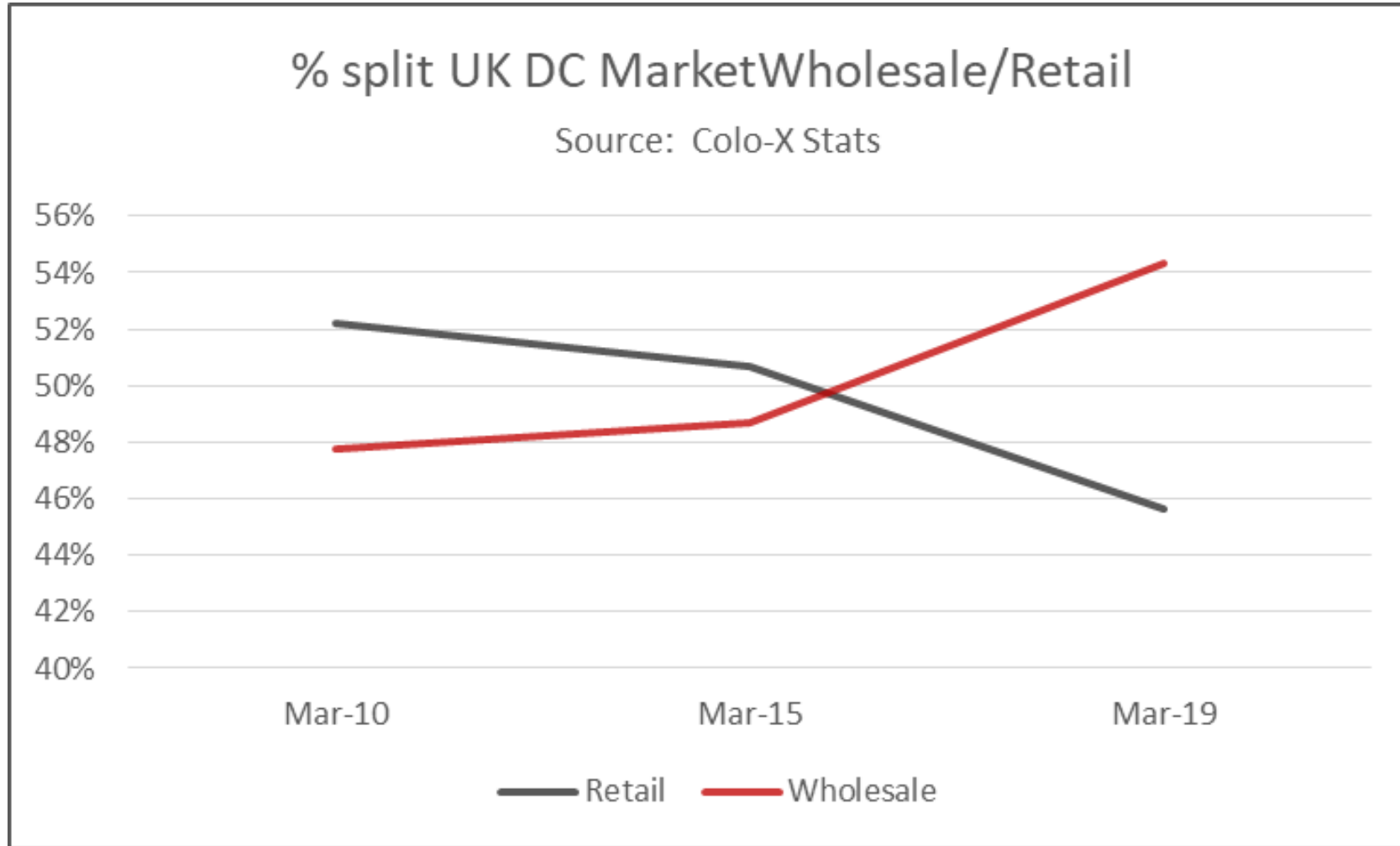


View in 2019: Recent changes – since 2015

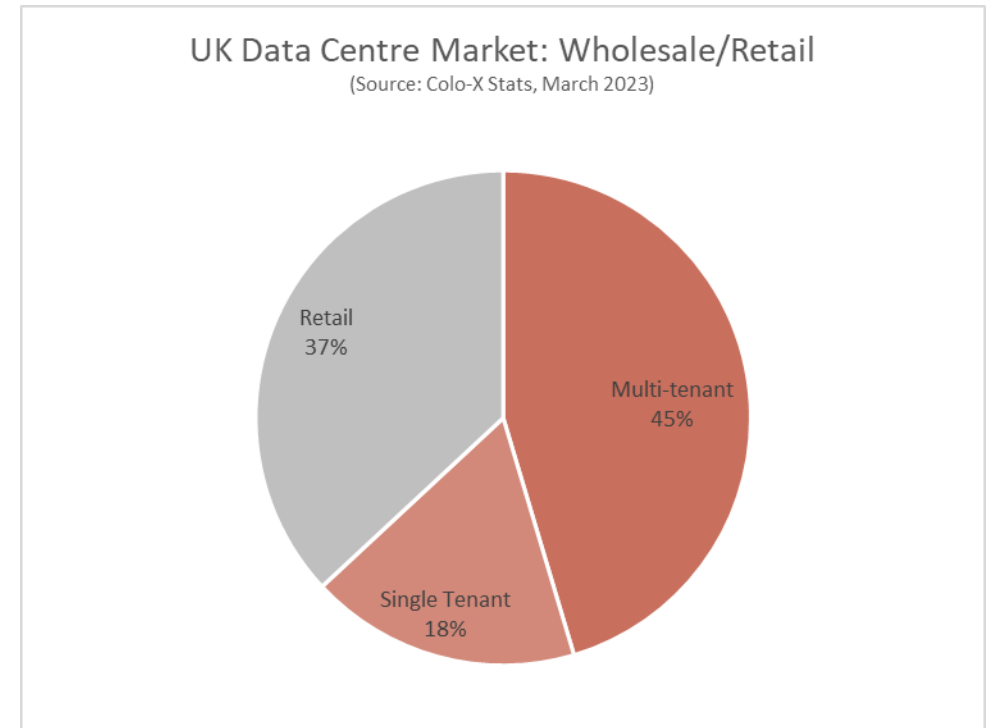
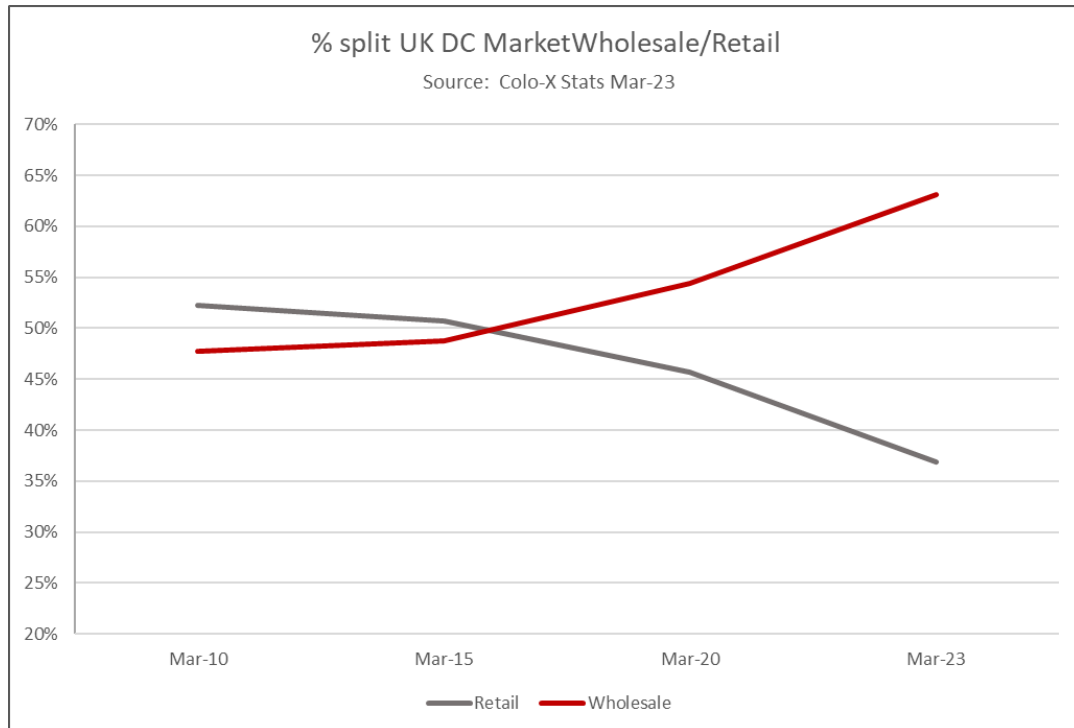




2019 - Evolution of UK's Data Centre Market



Update in 2023 – Wholesale Dominates



■ Concerns:

- Cloud continues to grow, but at a slower rate
- Capex rates post pandemic also slowing
- Previous wholesale slowdowns have impacted retail colo market

■ Bull Case:

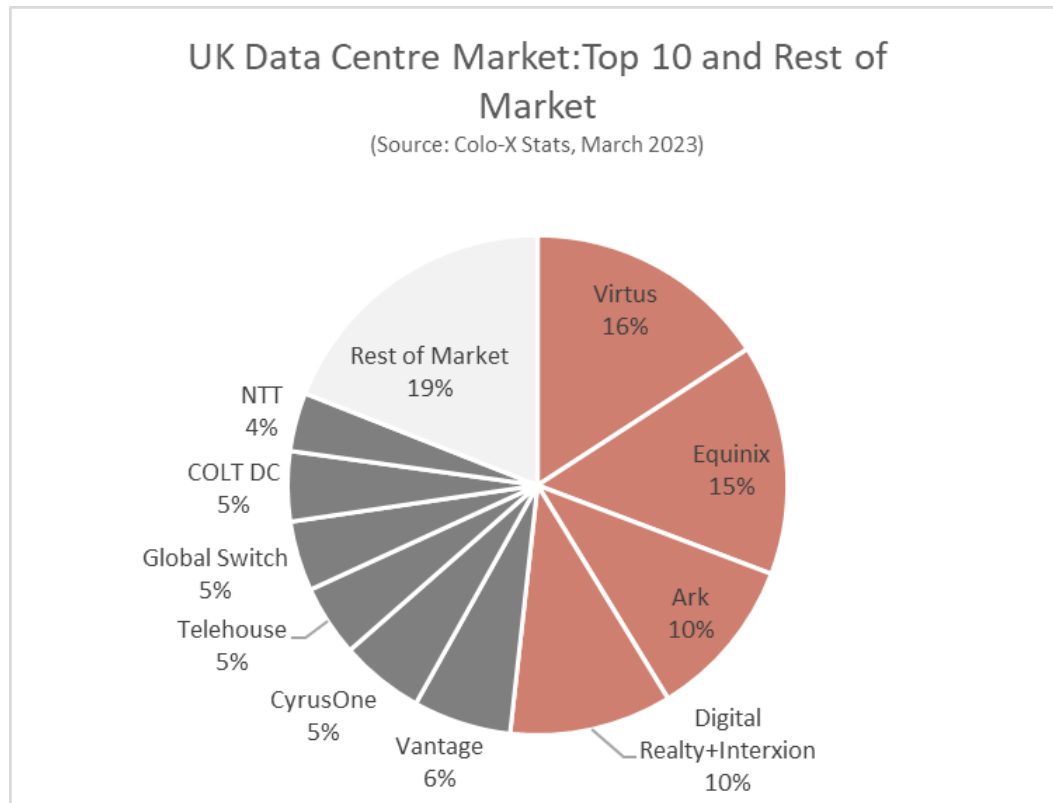
■ Market constraints:

- Sites with power and planning
- Personnel
- Higher Interest rates = less supply, higher pricing?
- Low vacancy rates

■ AI

- More GPU = more power = more heat

State of the UK Data Centre Market in 2023



- Colo-X DB = 140 sites, 1000MW, 50 operators
- Retail is expanding also! Almost exclusively in the REGIONAL market

State of the UK Data Centre Market in 2023 – RETAIL SECTOR

Colo-X RETAIL Operator Classification	Main Names	Sites/MW Each
<u>Premium Operators</u> 28 sites/215MW	Telehouse Equinix DRT/Interxion	5/50 14/135 9/30 28/215MW
<u>Managed Service Providers</u> 35 sites/73MW	Pulsant Iomart Redcentric Node4	12/26 6/12 6/12 3/10 27/50MW
<u>Colocation</u> 31 sites/62MW	Proximity Volta Datavita Datum	10/20 1/6 1/4 2/5 14/35MW
94 sites/350MW		

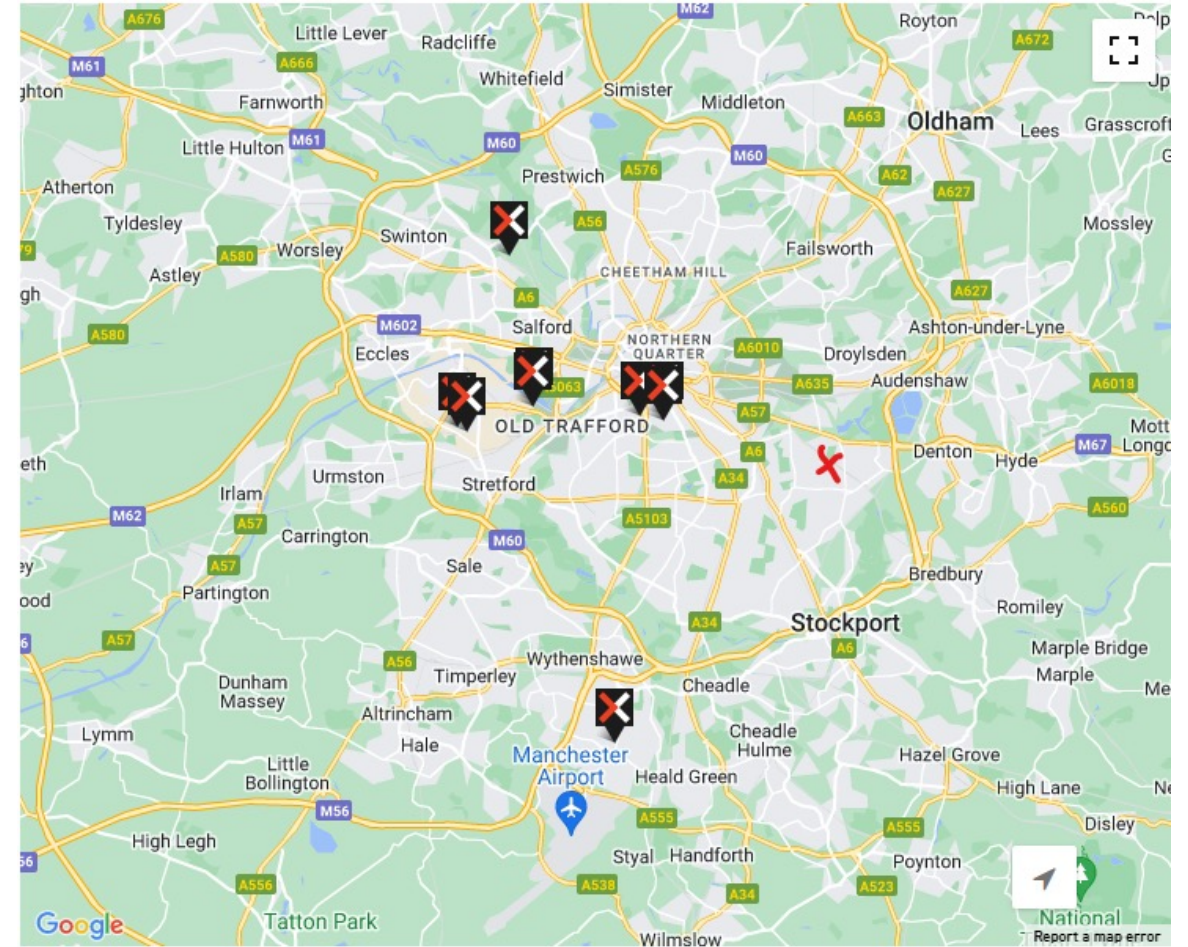
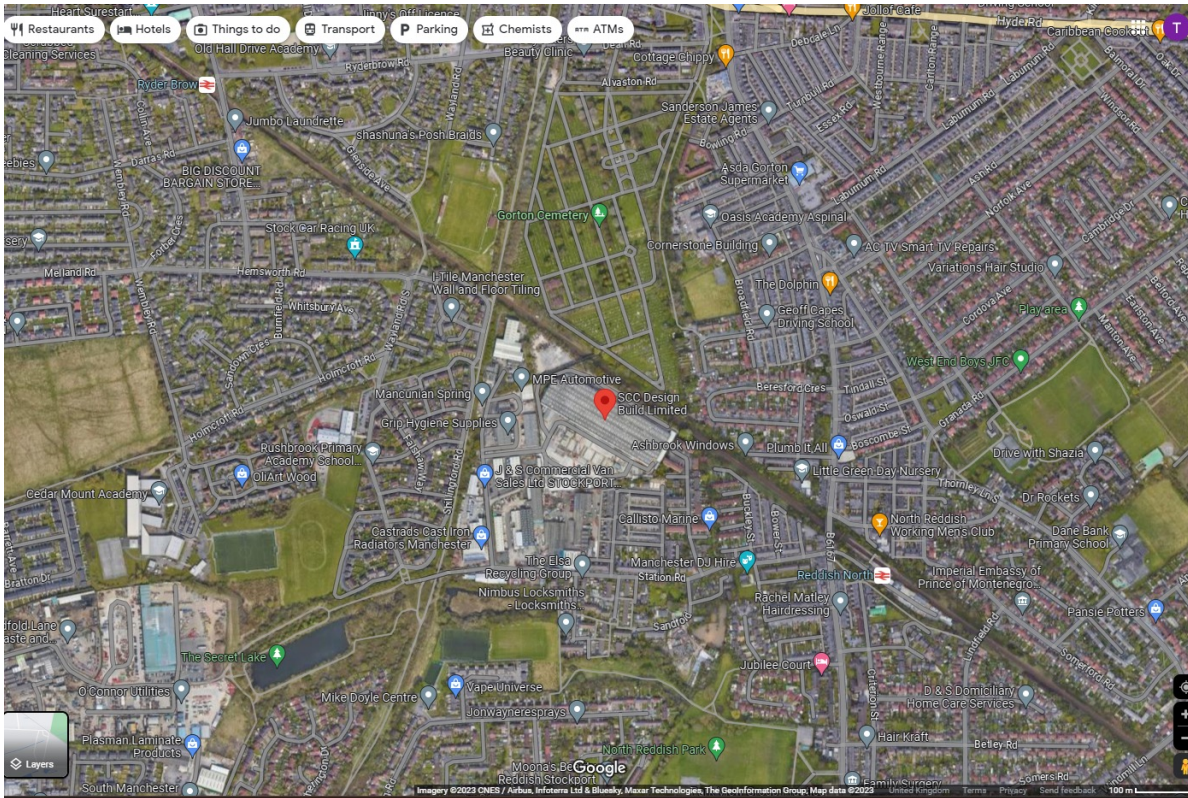
UK Data Centre Market 2023 – RETAIL COLO GROWTH

Operator	Sites/Capacity	Comment
Proximity Data Centres	10 facilities, 21MW	8 facilities are new to the UK colo market, two are acquisitions of existing sites
Telehouse South	5MW now, 15MW possible	Former Reuters data centre -re-opened in March 2022
Equinix MA5	First phase 6MW opened Q4 2022	MA6 next door to come, significant new capacity for UK Regional Market
AltasEdge (a new name, if not a new site)	Leeds/4MW	Acquired former Hardy Fisher site, expanding site to 4MW from 2

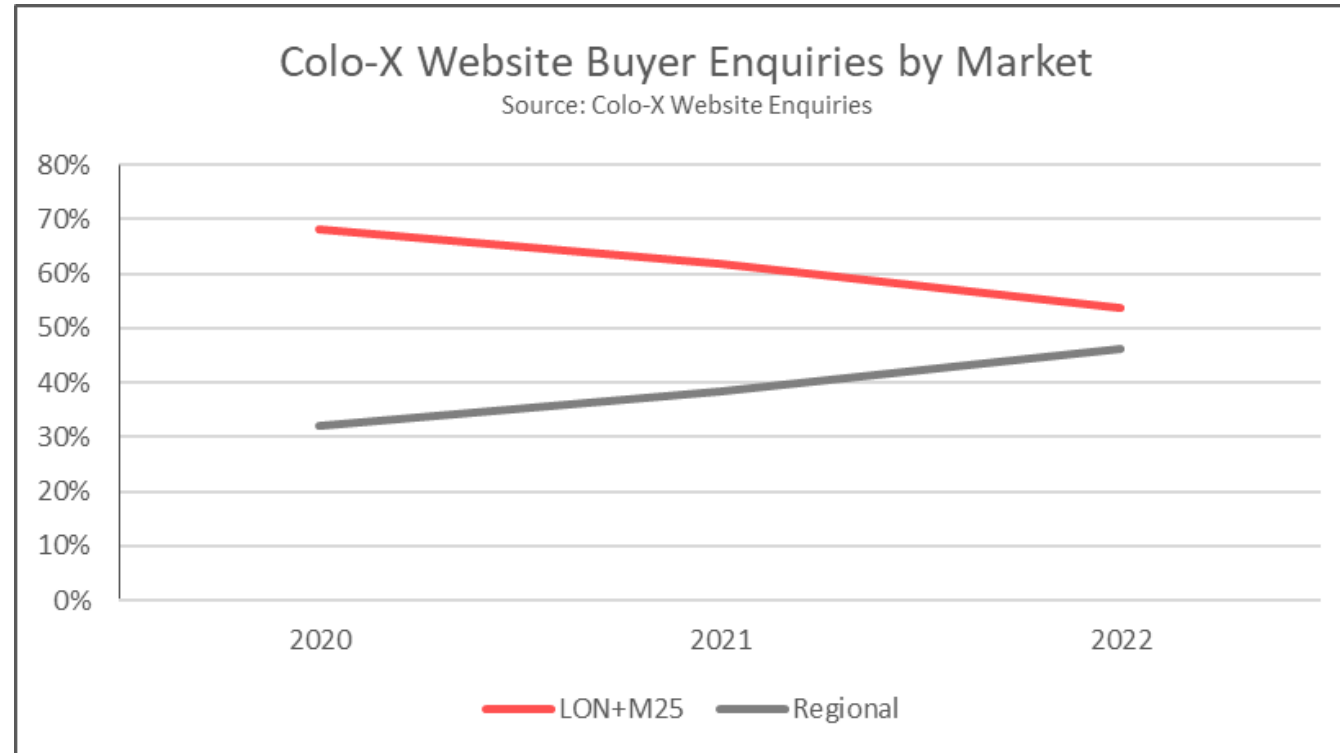
- 21 new facilities to Colo-X DC DB since March 2020
 - 9 wholesale/8 single tenant/91MW
 - 12 RETAIL, 32MW (currently)
 - Only Telehouse South in London
 - Rest REGIONAL

- STOP PRESS!
 - Kao Data 40MW Manchester facility

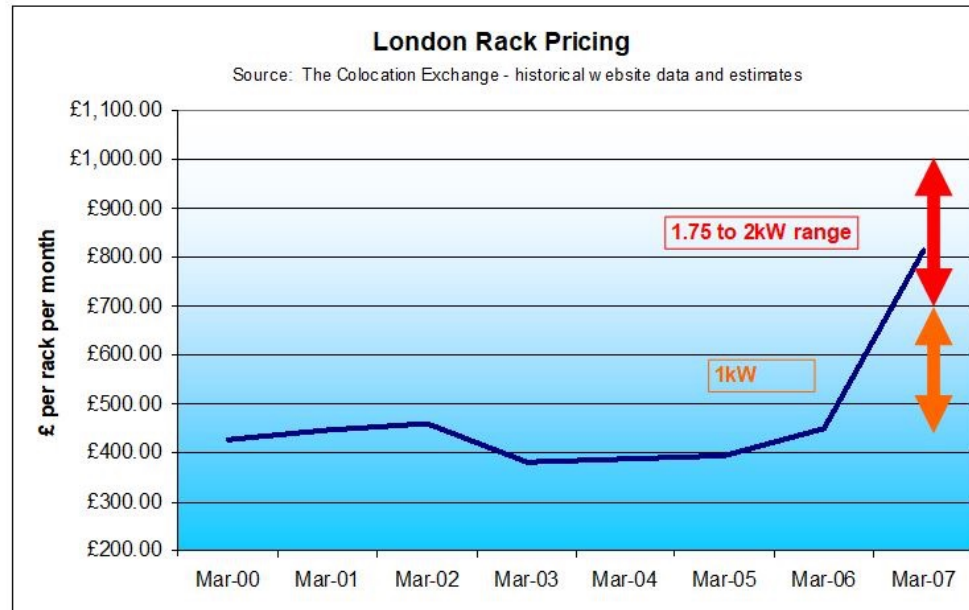
Kao Data Manchester – 40MW wholesale/market of 24MW



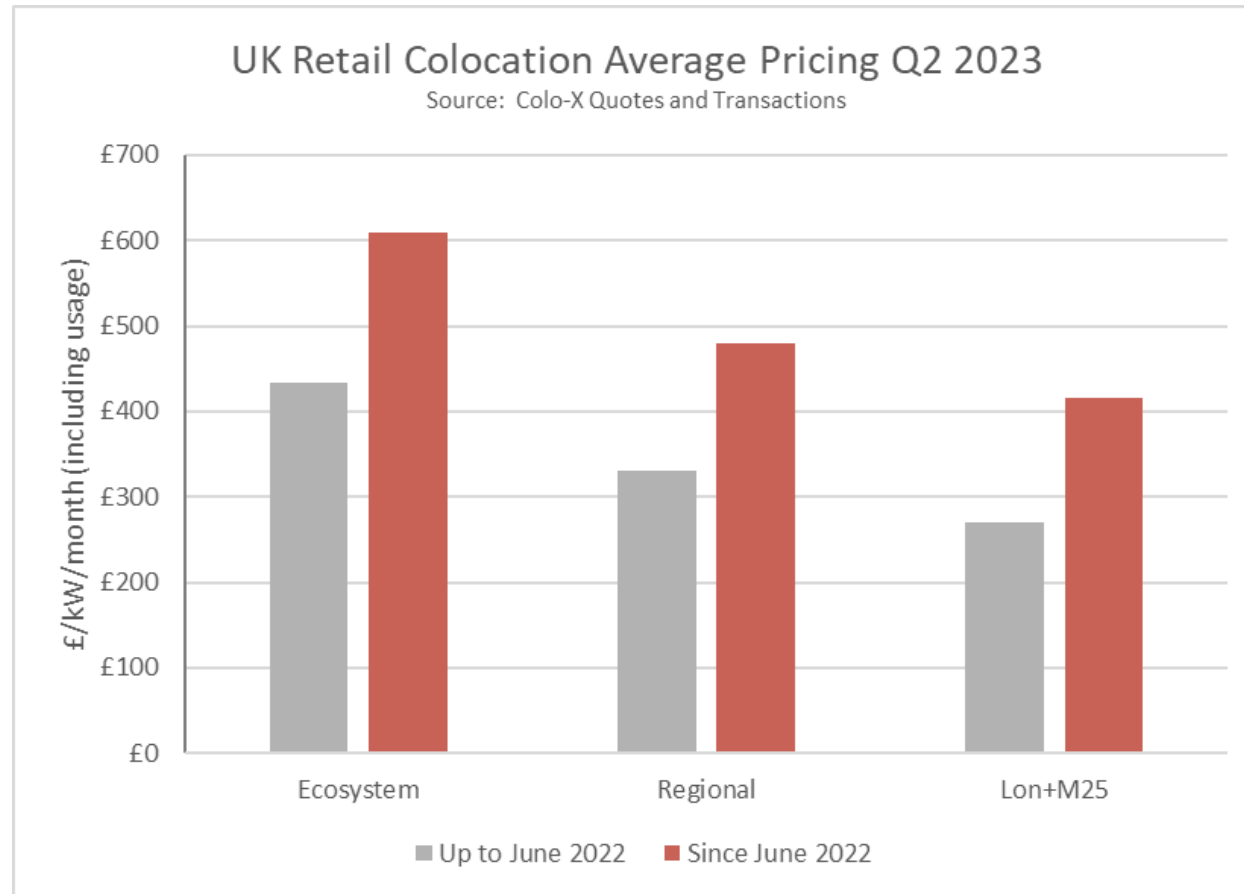
Growing Interest in Regional Colocation



Pricing Issues



Retail Colocation Price Changes Q2 2023



Today's UK Data Centre Market – New Names - 2019



Today's UK Data Centre Market – New Names in 2023



GTR



VERNE GLOBAL



yondr



- Verne – merged with Volta, Digital9 Infrastructure plc
- Green Mountain former Infinity Romford, East London, 40MW poss
- GTR/Yondr are large-scale hyperscale focus, Slough/West London, 40 and 100MW schemes
- Vantage – NGD in 2020 (LINX), 2 new London dc's 48+20MW



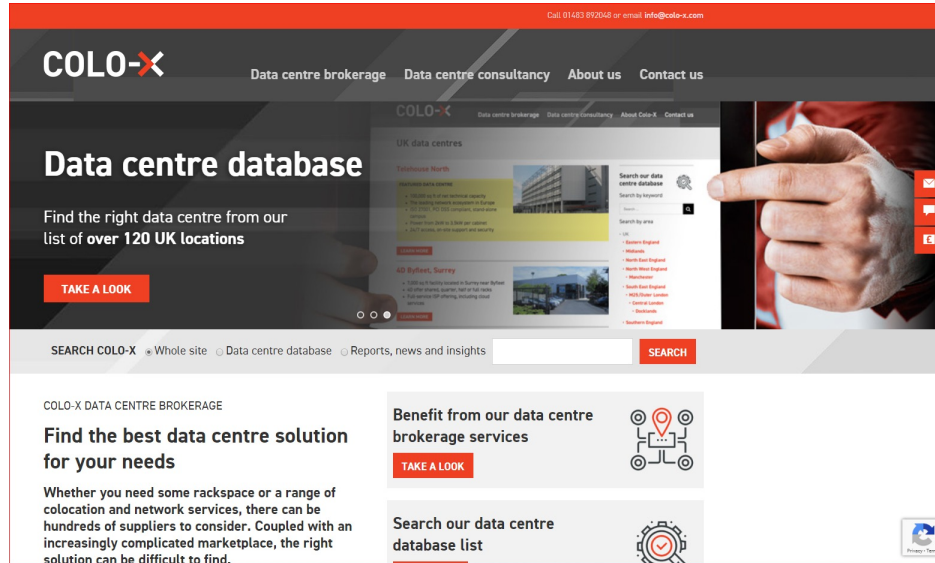
- New “edge” focussed operators
- Proximity – 10 sites, 25MW, big for regional market
- Atlas Edge – UK and Europe
- Asanti – 5 sites from Daisy
- Still early days for edge?

- Hyperscale dominates headlines
 - Single user sites
 - Virtual “private market”
 - Some questions over growth rates
 - Offset by site/power scarcity, rising capital bar
 - And AI.....
- Most in M25, but two regional wholesale sites
- Retail Colo also growing
 - Most growth in the regional market “edge”, not London
 - 3 new edge focussed operators in UK
 - Rising user interest but few “edge” cases yet
 - Some London growth: Telehouse South, Equinix LD8 + LD7, DRT Cloud House
 - Retail enquiries still strong, Colo-X website +20% ytd

2019 - ~~Crosspoint now Amito~~ - left in 2020, now Pulsant



Brokerage



- Focus on RETAIL Colocation
- 1/4, 1/2 and full racks
- Work with large global operators, independents, resellers, MSP's wide range of options
- Buyers from wholesale telecoms, eg network operators, enterprise, software, security, media, + AI...
- Gap in the market from new entrants needing managed service providers



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