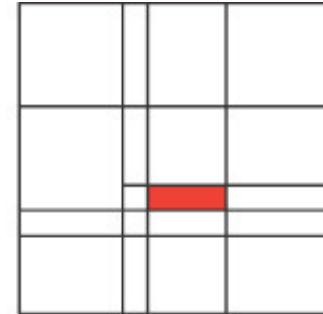

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Data Centre Business Models: Colo-X Perspectives

May 2011

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Starting Point - Market Structure



- **Real Estate/Wholesale Providers – sell leases**

- Digital Realty, Sentrum, Infinity, Global Switch, e-shelter, NGD

- **Colocation Providers – service contracts**

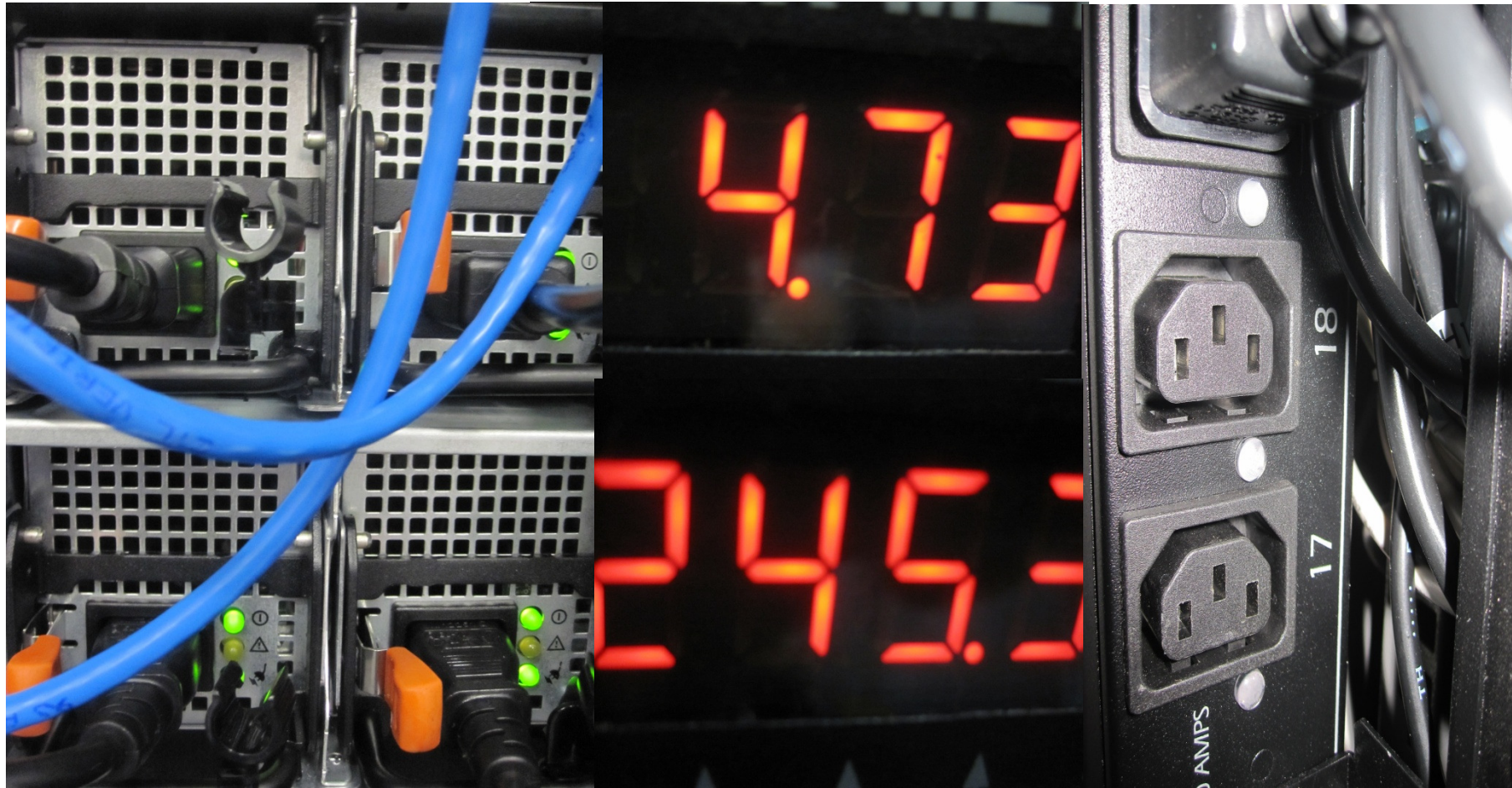
- Telehouse, Telecity, Interxion, Equinix, Blue Square/Lumison

- **New Entrants/MSPs – service contracts**

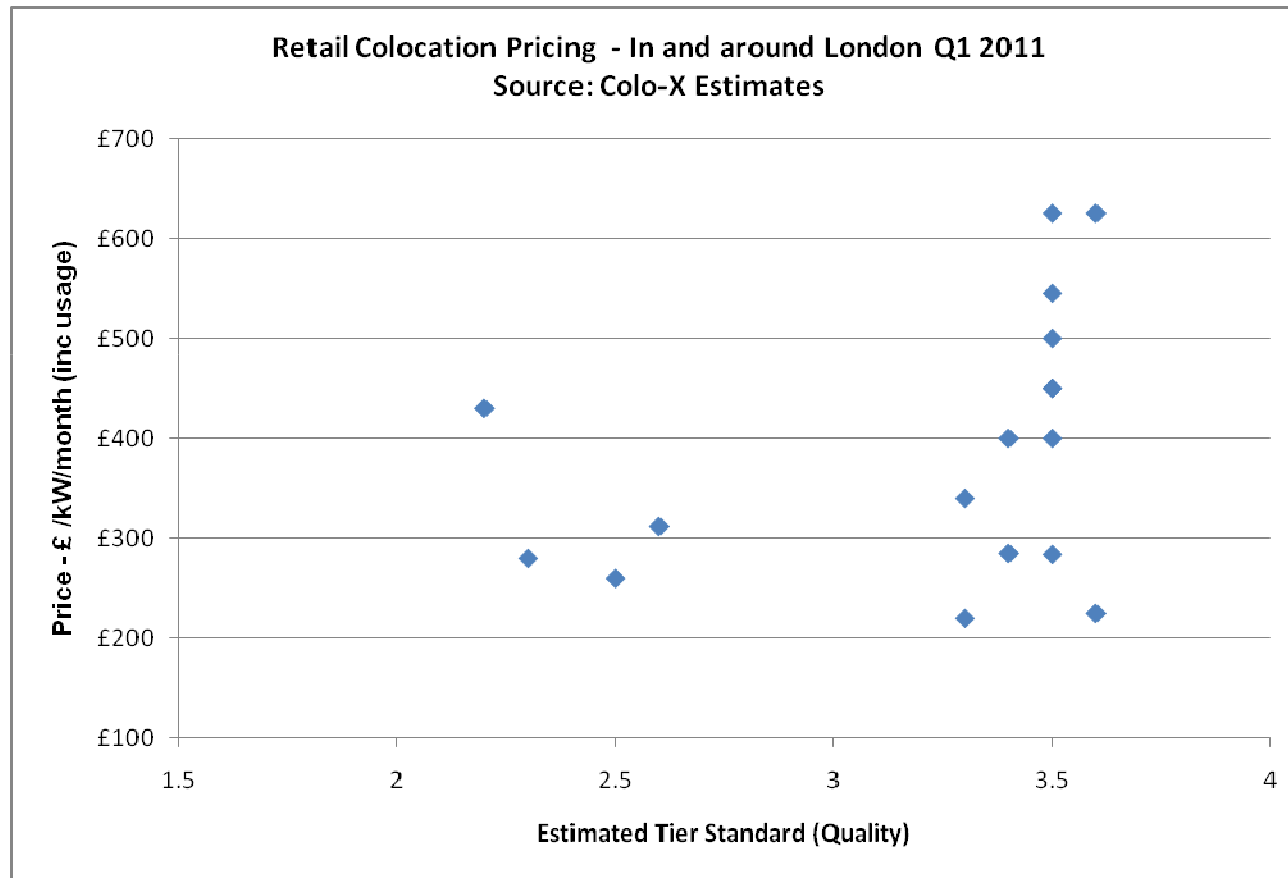
- Gyron, Dedipower, UK Solutions, Iomart, Node4, Network-i

Boundaries between categories are very grey!

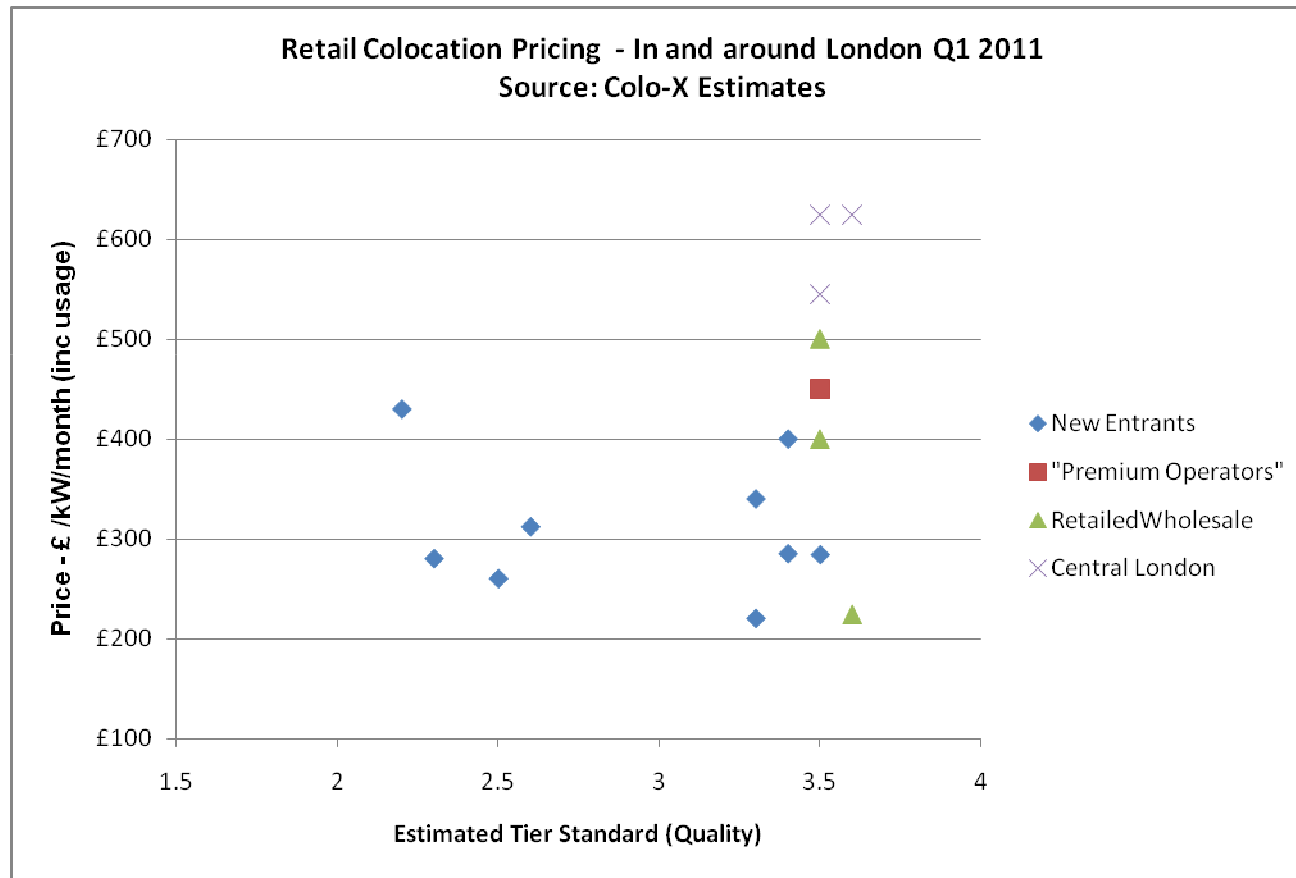
Business Models and Pricing



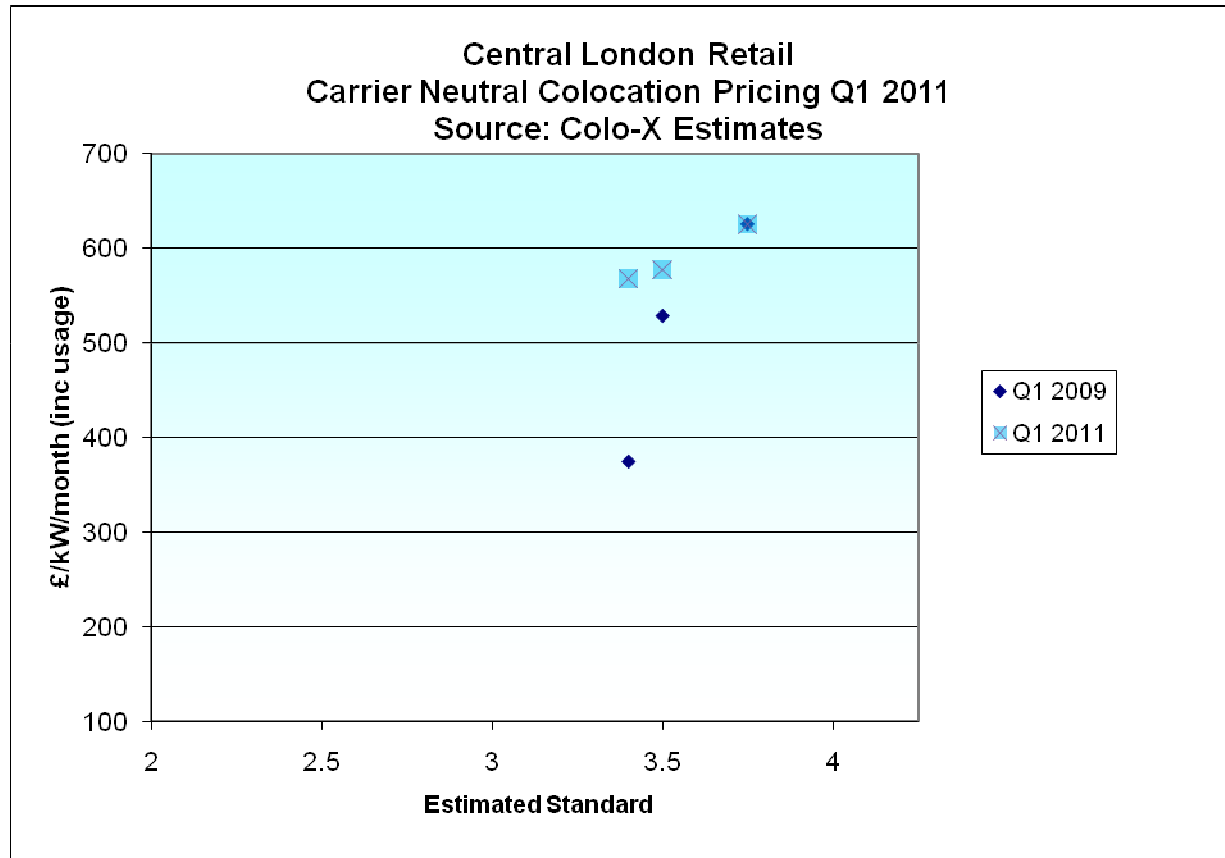
Business Models and Pricing



Business Models and Pricing



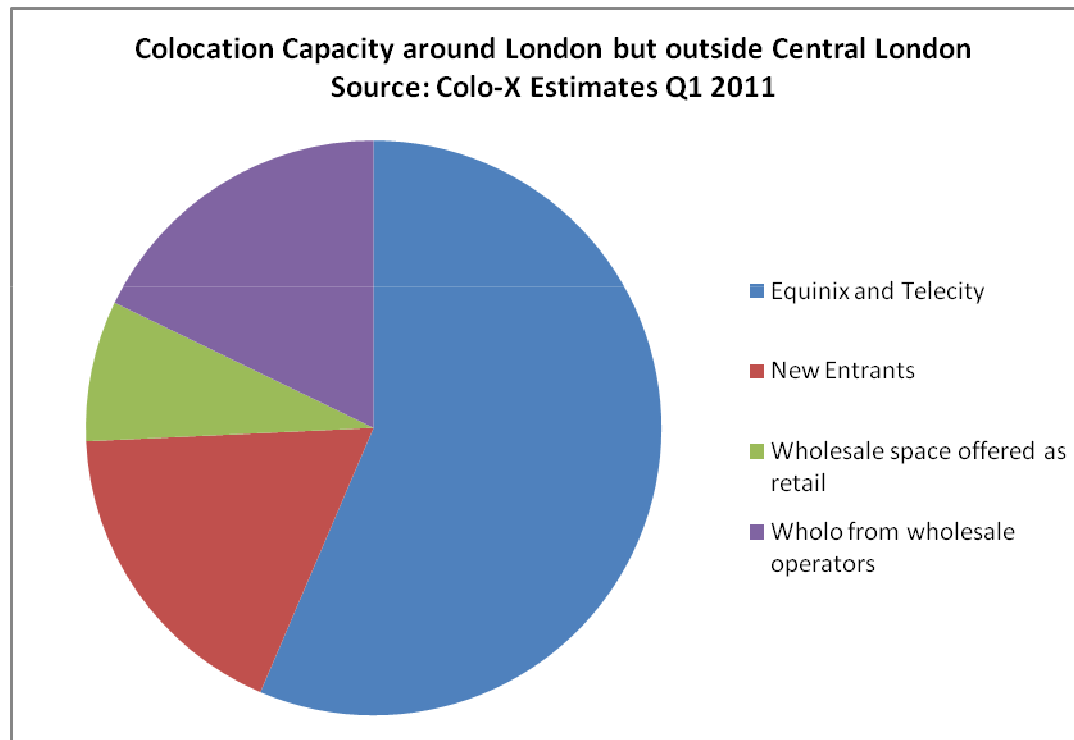
Business Models and Pricing



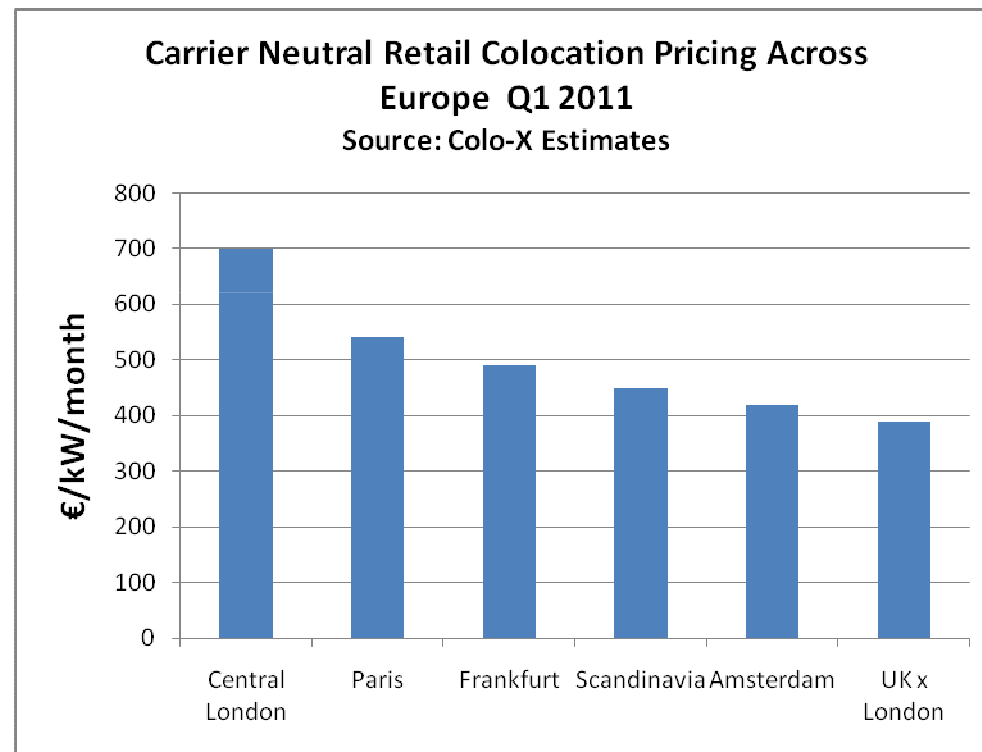
Business Models and Pricing



Business Models and Pricing



Business Models and Pricing

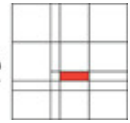


New Entrants



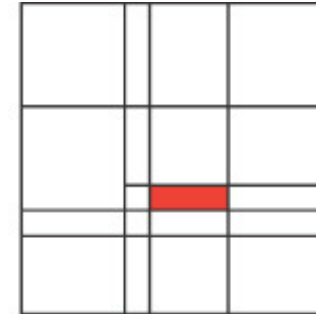
Colo-X Perspectives Summary

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- **Increasing choice, changing dynamics in the market**
 - **Don't buy into the headlines about capacity**
 - Established operators better stock management
 - New entrants
 - Wholesale as retail in various forms
 - **Does enterprise/cloud need premium colo?**
 - **BUT:**
 - Colo-X Buyers Guide – price 5th element in a discussion
 - **“Best model” is the one that meets our next deal!**
-

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