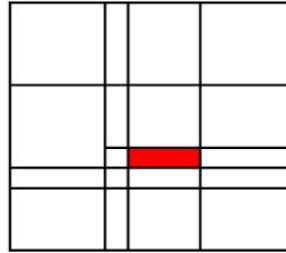


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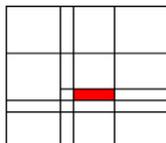


**The Central London and M25
Retail Colocation Market
Structural Changes and Trends
2015
Report Summary**

Tim Anker

The Colocation Exchange Ltd

the**colocation**exchange



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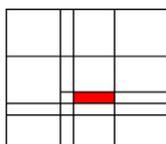
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Report Outline

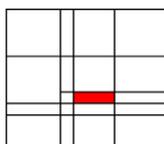
The aim of the 2015 edition of the Colo-X report is to update the reader on the significant changes that have taken place in the London and M25 retail colocation market over the last two years. To do this the report is broken into three key sections:

1. Overview of the UK Colocation Industry

- Highlights the key markets in the UK being Central London, M25 and the regional colocation market
- Review of the significant changes in the supply mix across the entire UK retail colocation market from 2005 to 2015 and shift in market shares
- Discussion as to how the structure of the UK retail colocation marketplace is changing, evolving from a geographic focus to the massive growth in “undifferentiated capacity” and the value becoming apparent in key colocation ecosystems
- What has happened to retail colocation pricing over the past two years?

2. The Central London Retail Colocation Market

- The Market Overview section provides a detailed update on the state of the central London market covering key developments from all operators, including new entrants and the smaller central London operators
- An analysis of the situation with the Central London wholesale operators is provided
- Analysis of the announced future capacity additions to the market, from whom and when, what the total amount of potential supply equates to
- The report then looks at an estimate of what demand is in this market and puts the supply estimate into context, as well as providing further analysis of the threat posed by capacity around the M25.
- Our review of LINX port distribution continues to emphasize the strength of key Central London colocation network ecosystem and our “league table” highlights our opinions on the strength of specific facilities.
- The review of colocation pricing in Central London shows how the picture has changed over the past few years
- Finally we also look at some longer term themes including product definitions and the outlook for pricing



3. The M25 Retail Colocation Market

- The report provides a review of source of retail colocation supply and summarises current capacity and pricing
- A detailed overview is given highlighting specific areas of growth around the M25 and activities by the key operators
- A contrast is provided comparing the market in the M25 with the Central London market, looking at market shares and network choice
- Retail colocation pricing in the M25 is examined including an analysis of recent Colo-X price points and comparison of the convergence between retail and wholesale pricing
- We examine how operators are looking at service and focus to differentiate themselves in the market

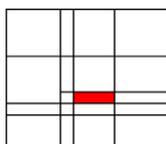
4. Report Summary

Fees

For pricing details please contact Colo-X (info@colo-x.com)

The Colo-X Report Package includes:

- Delivery via soft copy as .pdf format
- Up to five copies, printed and bound also available optionally upon request
- A meeting in Central London of up to 1.5 hours with Tim Anker to discuss the report further and deal with any follow up questions. Meeting at alternative locations by arrangement only.



Methodology

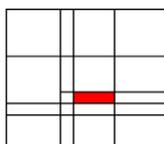
The independent position of Colo-X in the UK colocation industry and the fact that we work with all types of providers gives us a unique ability to assess the retail colocation market as whole. On pricing our findings are based upon information we believe to be reasonably available in the market or which could be fairly easily discovered by an external consultant. Where pricing is used it should be considered “our opinion” on pricing rather than specific price quotes.

Colo-X has been involved in the industry since 1999 so we have a wealth of historic data from both actual transactions and quotations that we are able to utilise as well as our overall experience, market intelligence and impressions gathered through numerous meetings, conversations and transactions.

The author also owns and operates Crosspoint Colocation, a 45 rack colocation business in London Telehouse, Teletcity Harbour Exchange, Volta, DRT Woking and Everest Reading. Crosspoint spends over £0.6m per year on colocation services again emphasising the unique and fact based nature of the perspectives available in this report.

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The report is 60 pages and over 15,000 words.

