



UK Regional Data Centre Market 2020-21

Poised for growth

Report summary

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Methodology

Colo-X's independent position in the UK colocation industry, and our interaction with providers of all shapes and sizes, gives us a unique ability to assess the retail colocation market. Our price 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 company specific price quotes. Unless specifically mentioned, pricing information in the report is always quoted on a power-included basis.

Colo-X has been involved in the UK colocation industry since 1999, meaning we have access to a wealth of in-house historic data from both transactions and quotations. We are able to utilise this information together with our overall experience, market intelligence and impressions gathered through numerous meetings, conversations and dealings. The author of this report also founded and operates Crosspoint Colocation Ltd (now part of Amito Ltd) a 100-rack colocation business that uses capacity in London Telehouse, Equinix LD5 and LD8, Global Switch, Everest Data Centres, and Volta. Amito spends over £1.5m per year on London colocation services and operates its own 1,000 rack data centre in Reading.

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Introduction

With all the attention focussed on the huge growth we're seeing in the London and M25 data centre market, mostly driven by the insatiable demand for wholesale based hyperscale requirements, I have long felt the UK regional market (i.e. that part of the market away from the M25) needed a thorough overview, which I am pleased to present in this report.

The Colo-X database covers 49 facilities in this part of the UK market, of which four are wholesale focussed. Just like the market in London, these four data centres are having a big influence on overall capacity, especially from the two operators who have the most traction so far. However, in researching this report I have definitely felt a sense that things are now changing, even in the retail-focussed part of the regional market.

Obviously, we are now seeing the impact on enterprise of Covid-19, and the shake up in how businesses operate is now driving small-scale data centre requirements. For several years there has also been much talk (hype?) about 'edge' in the industry, but our top-down review of edge demand suggests the timing is still too early. That said, we've recently uncovered two specific examples of UK edge deployments – and the longer-term drivers are definitely there, as our review highlights.

With Equinix now planning what we estimate will be 30MW of new Manchester capacity (for MA5 and MA6); a revitalised 32MW potential being brought to market by Stellium in Newcastle; and the really impressive new offering from DataVita in Glasgow (one of the few UK facilities to have both Tier 3 Uptime Design **and** Construction certifications), it does indeed look like things are beginning to get going again in the UK regional data centre market.

I hope you enjoy our report, and I look forward to your feedback and discussing it further.

Tim Anker

Director, The Colocation Exchange Limited
December 2020

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5Nines	EdgePresence	Peer1
Aegis	EE	Proximity Data Centres
Aimes	Equinix	Pulsant
Amazon Web Services	Etix Everywhere	PureDC
American Tower	Exponential-e	Redcentric
Amito	Global Switch	Redwire
Apple	GTP3	Santander
aql	Hardy Fisher	SBA Communications
Ark Data Centres	Host-IT	SCC
Ask4	Indectron	Scolocate
Blue Chip	Infinity	Serverchoice
Blue Square Data	Interxion	Serverhouse
BT Global Services	IO Data Centers	Six Degrees
CeretusIT	Iomart	Stellium
CityFibre	IXEurope	Telecity
Colo Atl	L51 Developments Ltd	Teledata
CogecoPeer1	LDeX	Telehouse
Crown Castle	Level3/CenturyLink	The Bunker
DartPoint	M247	UKFast
Datavita	Memset	UKGrid
Data Centre Intelligence Ltd	Migsolv	Vantage Data Centres
Datum	New Continuum Data Centres	Virtus
Dedipower	Next Generataion Data	Volta
Digital Realty Trust	Node4	Zenium
EdgeConneX	NTT	



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