Data Center Trends
Global and UK

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The Brief

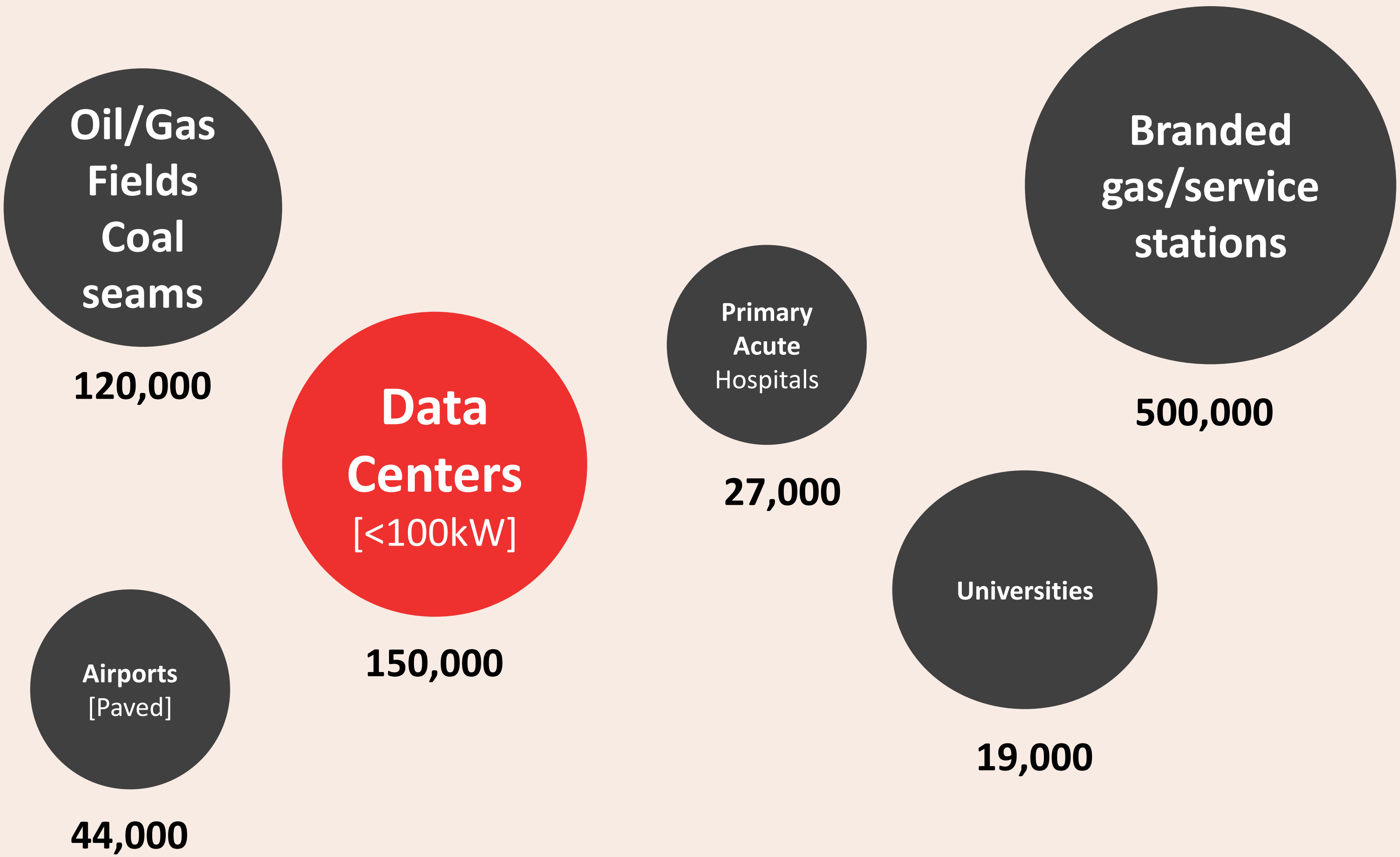
- Has the market for Data Centers in the UK changed during a period of economic uncertainty
- What has driven these changes
- What facts should M & E contractors take into consideration

What We'll Be Discussing

- Global Data Center Market Trends
- UK Market Trends
- Key Industry Changes
- The Impact of Changes on Data Center M & E Contractors

Global Data Center Trends

The Global Data Center Market 2012



The Data Center Industry as a ‘Country’

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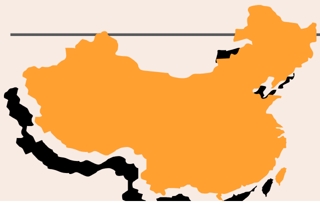
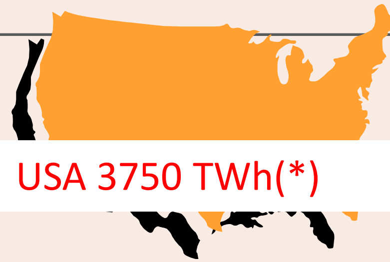
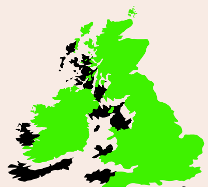


China 4700 TWh(*)



USA 3750 TWh(*)

Japan 860 TWh(*)



UK 340 TWh(*)

Italy 310 TWh(*)

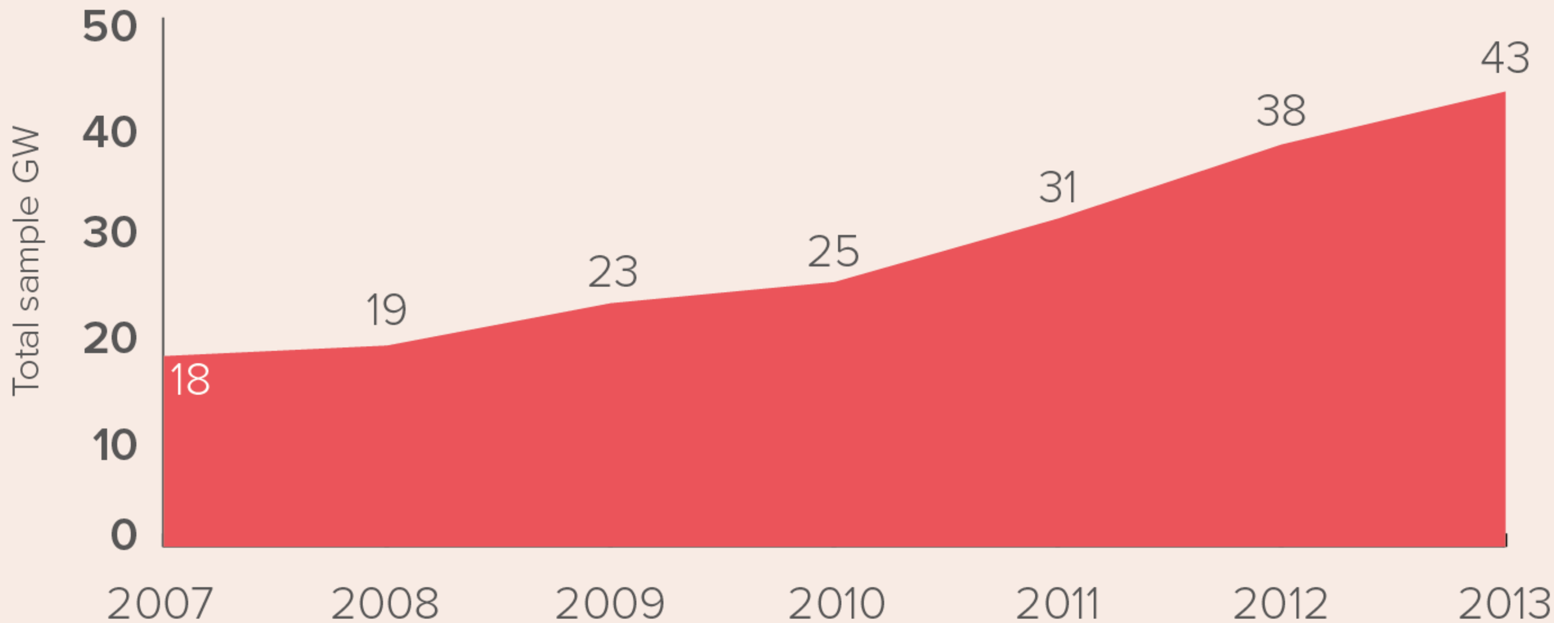
Spain 260 TWh(*)

Datacenters 332.9 TWh**

(*) National Statistics for Electricity Usage ONLY 2010 I& 2011 The World Factbook & IAE data

(**) Based on Census 2012 population projections of maximum stated capacity including end user reporting of outsourced footprint

Global Power Growth

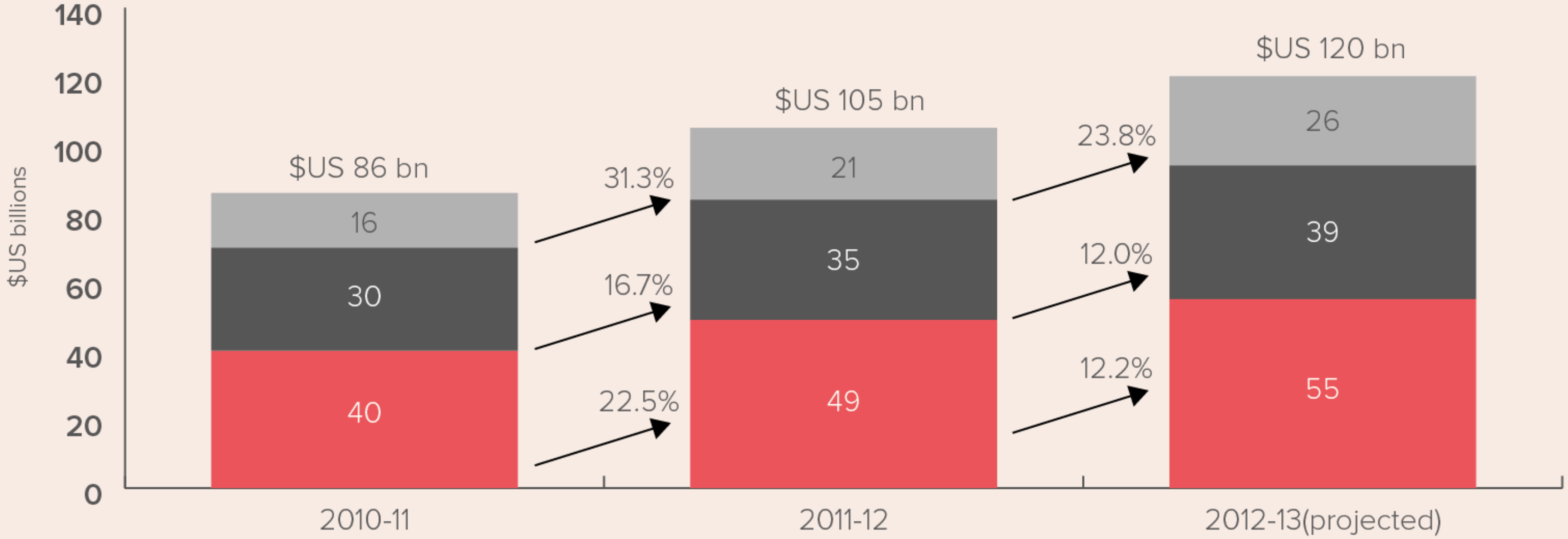


Source: DCD Intelligence 2012

Key

●	Total GW (population)

Data Center Investment

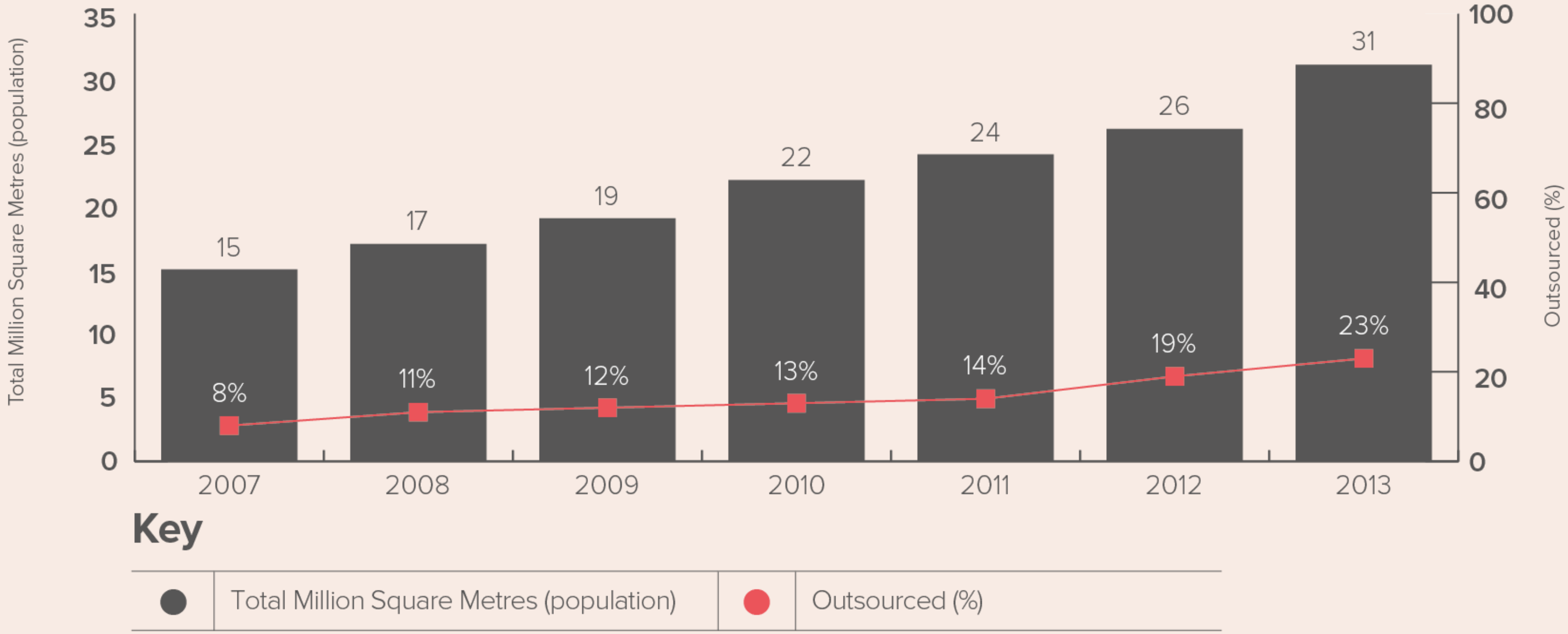


Key

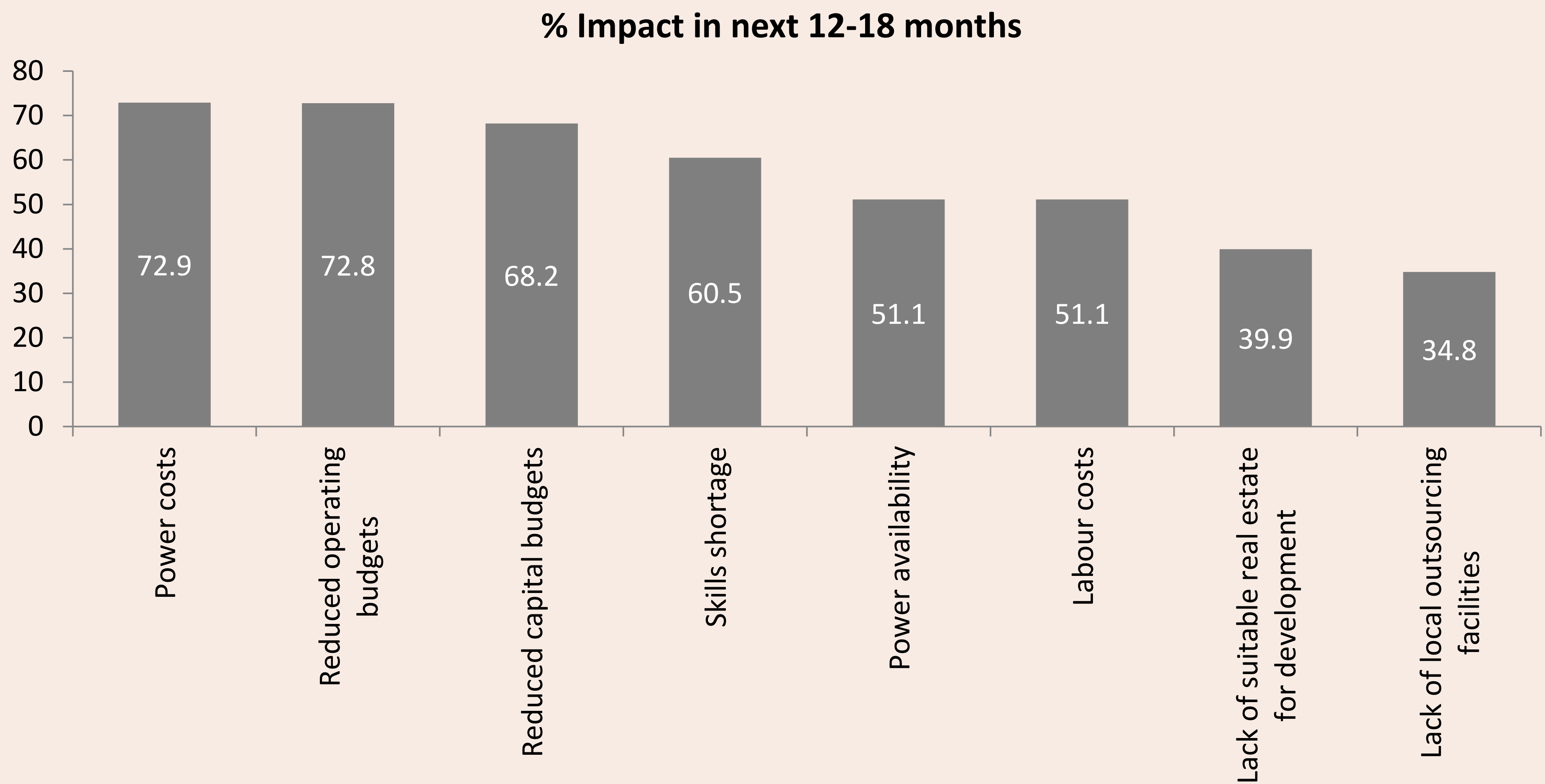
●	Facility (in US$ bn)	●	IT (in US$ bn)
●	Outsourcing (in US$ bn)	●	Growth Rate

Source: DCD Intelligence 2012

Growth in Space / Outsourced Footprint

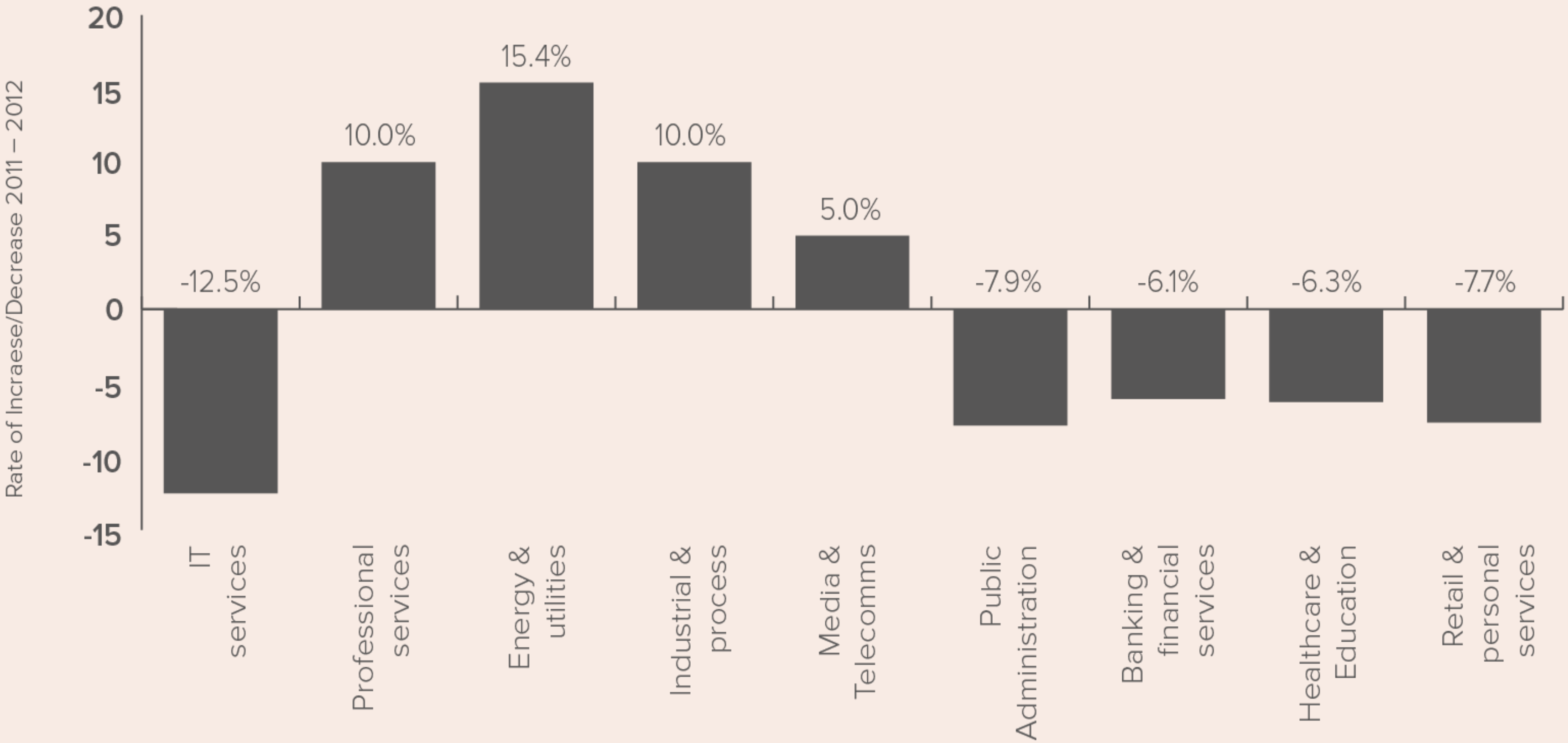


Global Trends: Key Challenges



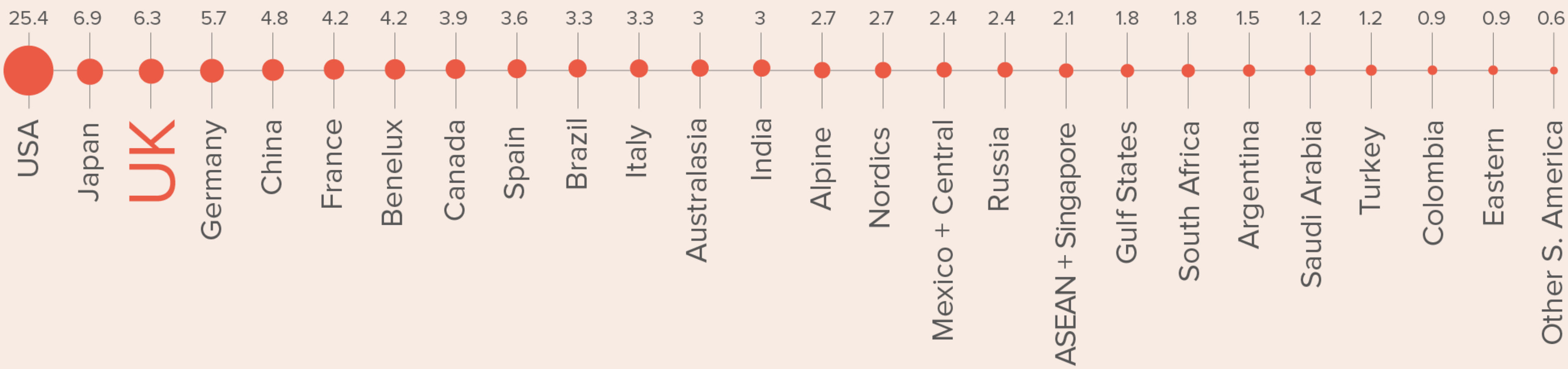
UK Data Center Trends

White Space per Industry Vertical 2011-2012

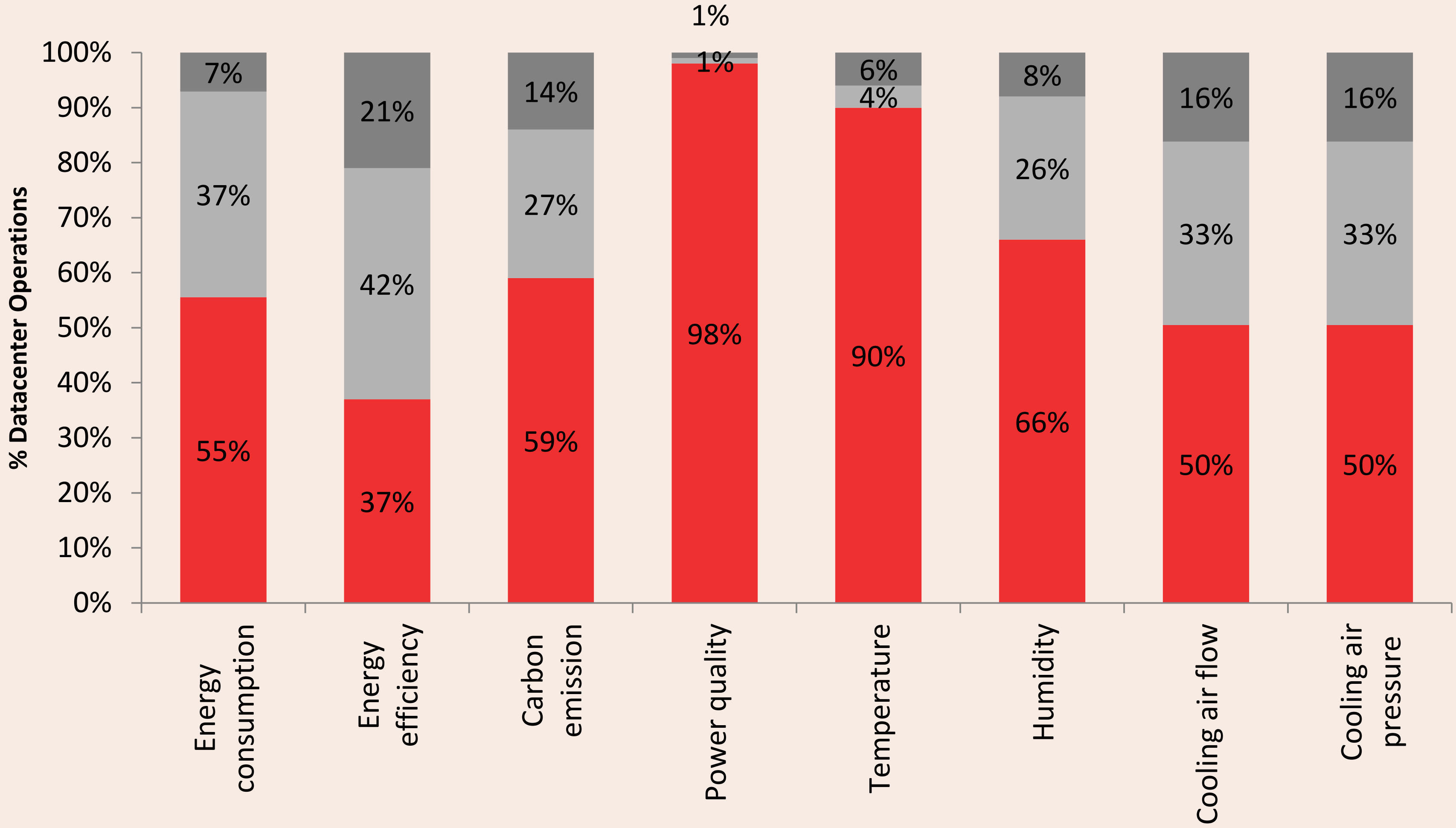


Source: DCD Intelligence 2012

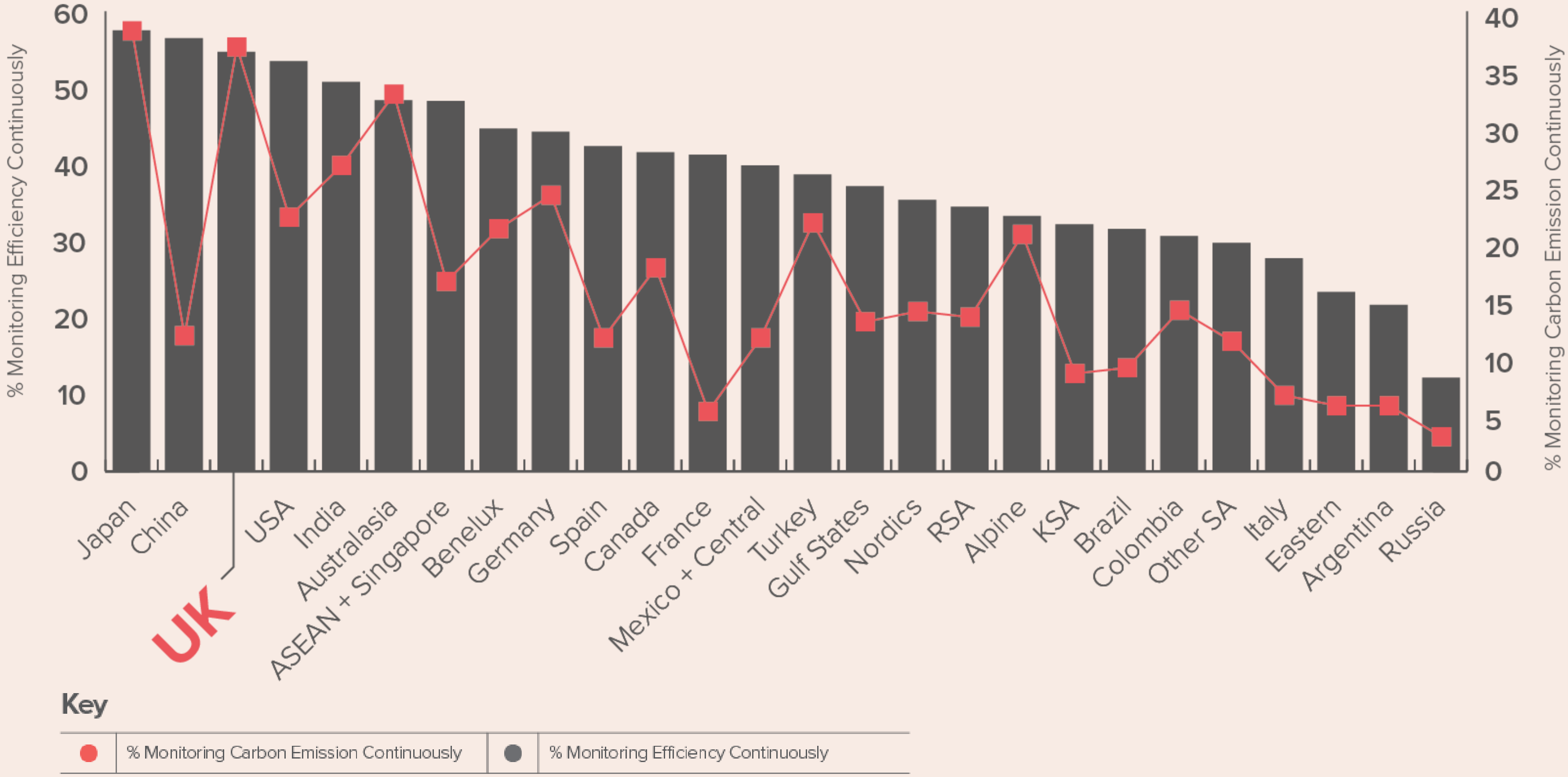
TWh Requirements 2012: UK share of the Global figures (%)



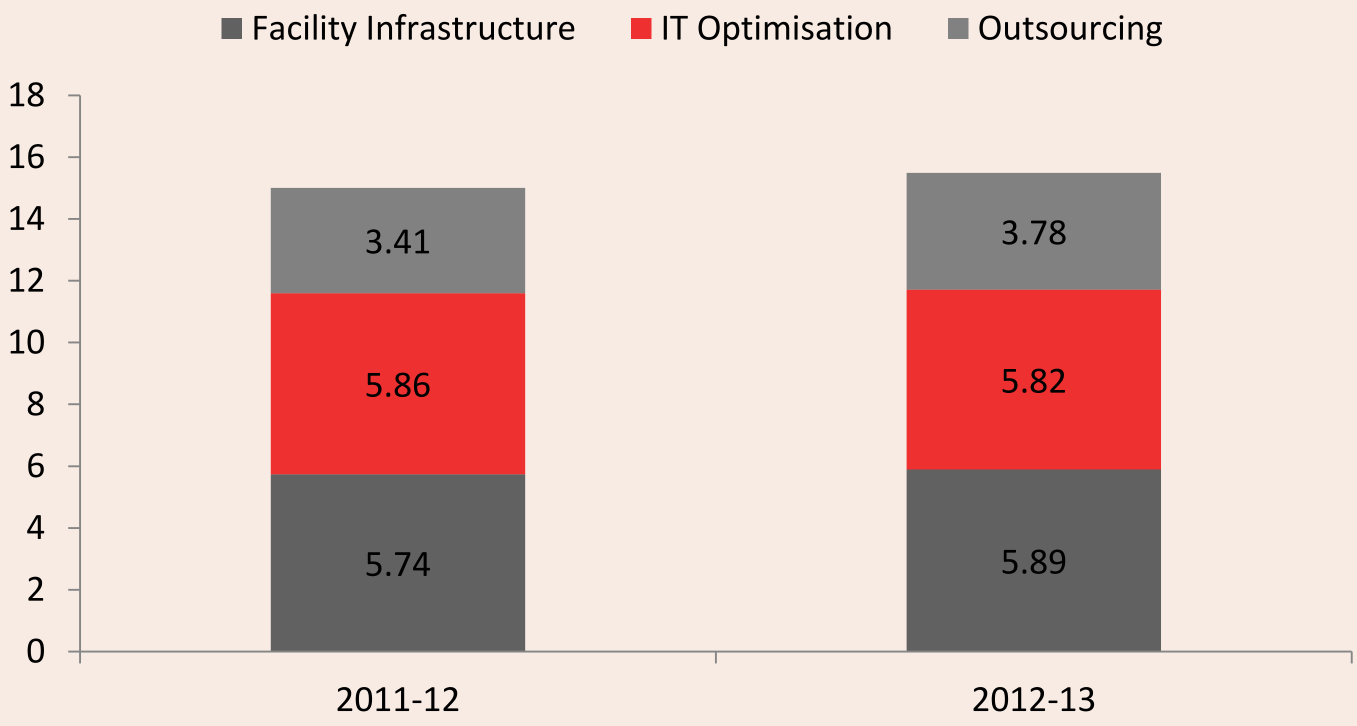
Monitoring Key Parameters: UK 2012



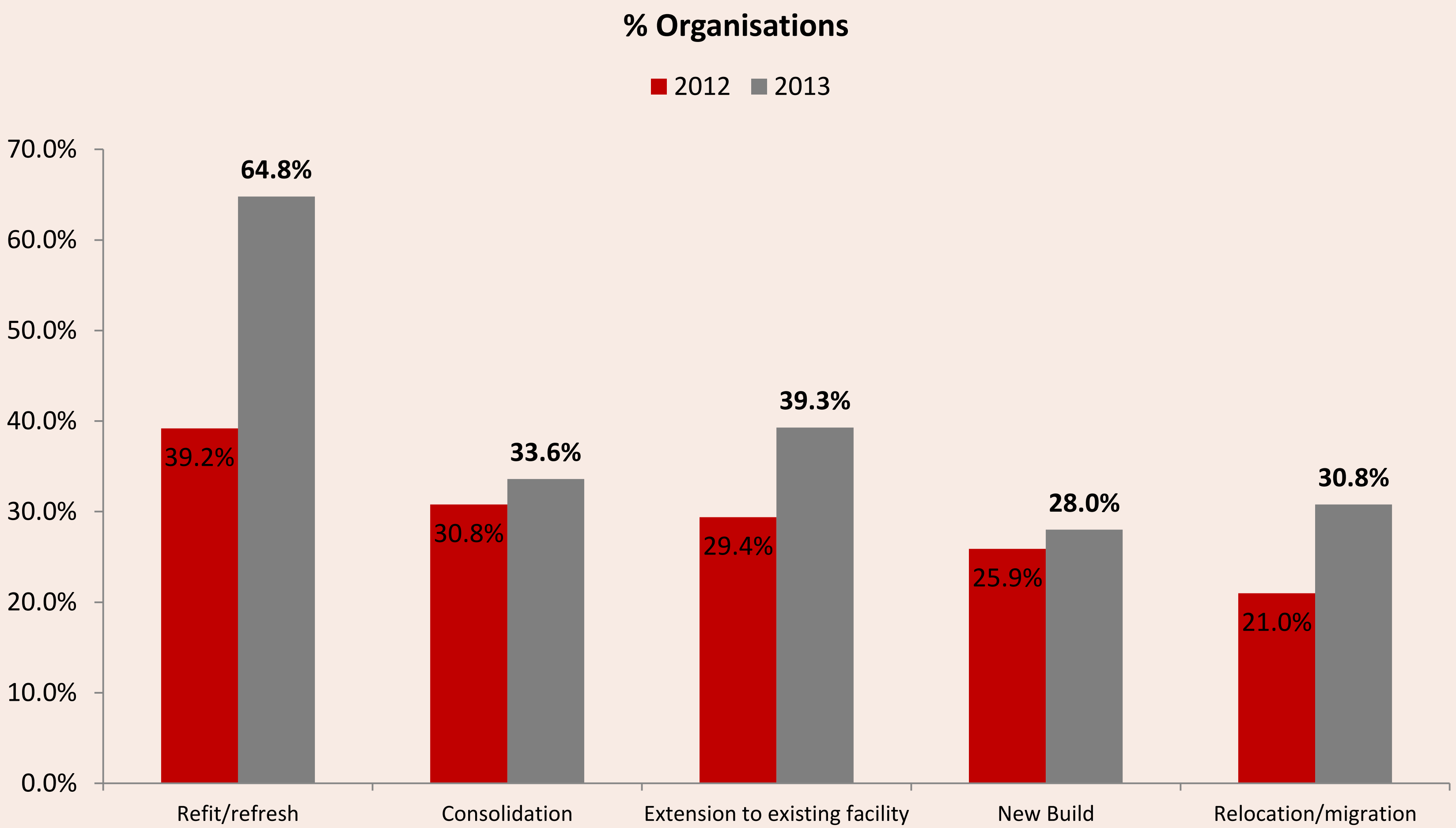
Global Energy Monitoring: UK focus



DC Investment Amounts by Avenue UK 2011-13 (US$ bn)



Investment Avenues: Major increase in refit/ refresh



Industry Changes

What has changed over the Past 5 years in terms of the facility?

EVERYTHING!

- Reduced Budgets
- Technological change acceleration
- Increased use of outsourcing
- Consolidation Projects
- Efficiency

Increased Focus on Efficiency

- Driven By

- Technological Change
- Space Constraints
- Consolidation
- Reduced Opex budgets
- Increasing cost of Power

Change in Facility Design

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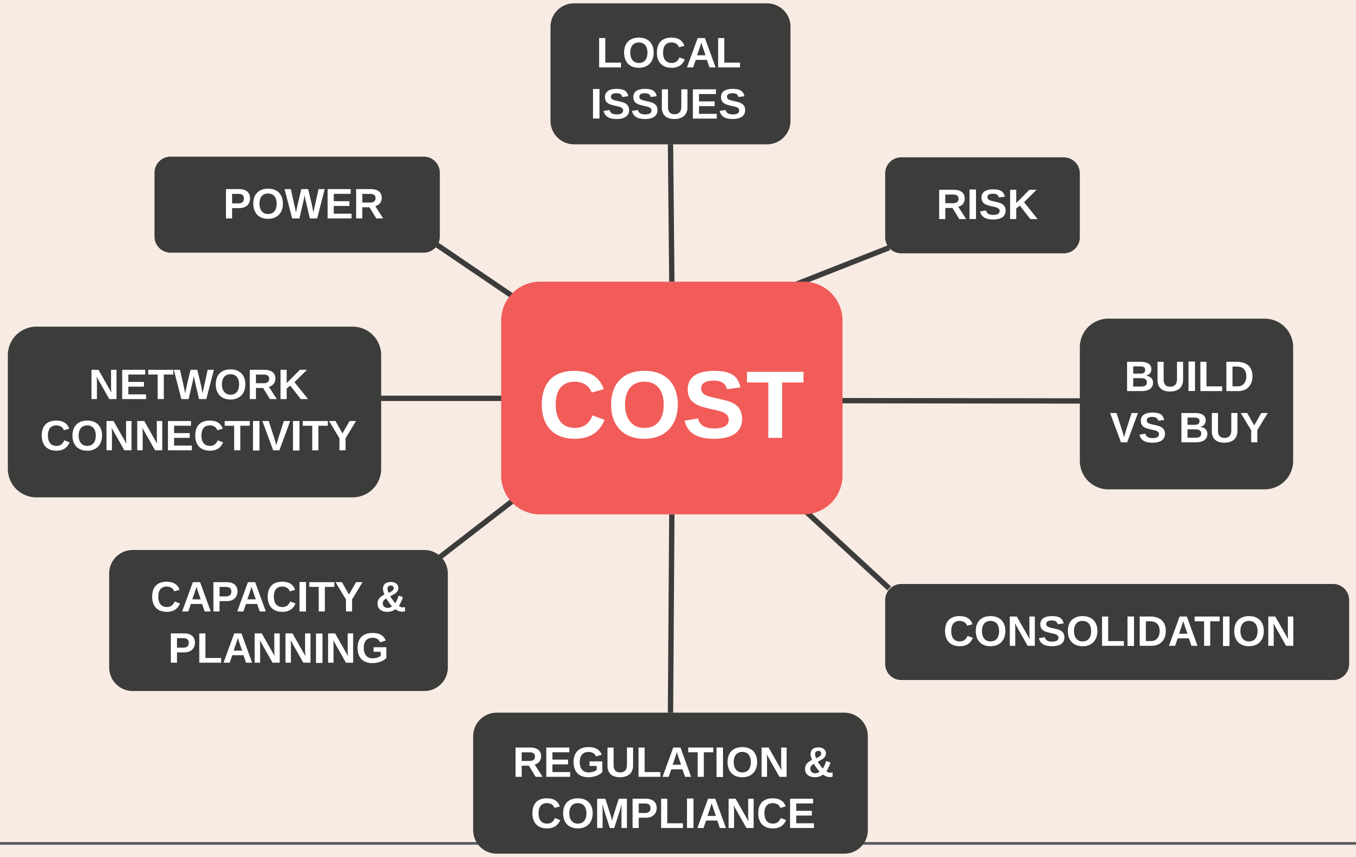
- Energy Efficiency
- Reluctance to be ‘tied in’ to one vendor
- Increased refit / refurb cycles
- Efficiency Measures determined from the outset
- Difficulties in capacity planning
- Increase in popularity of modular data center design


LOCAL ISSUES
POWER
RISK
NETWORK CONNECTIVITY
COST
BUILD VS BUY
CAPACITY & PLANNING
CONSOLIDATION
REGULATION & COMPLIANCE

Inside the market

INTERNATIONAL DATA CENTER STRATEGY

Risk Assessment Touches All Points

What Does this mean for the Future (and for M & E Contractors)

- Less Data Centers Being Built?

 - Fall in White space 2011 – 2012

Forecast to grow from 2.95msqft in 2012 – 3.13msqft in 2016

- But – Refit / Refresh cycles accelerated
- DC operators want to be vendor neutral in order to allow for new technologies

- Cost vs Risk paramount