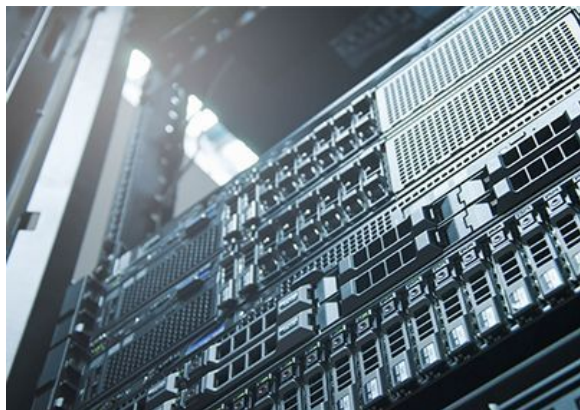


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“The data centre sector remains highly fragmented in the UK as it is worldwide. Growth in the number of data centres is slowing, but demand for services continues to grow. This is encouraging widespread modernisation of the legacy infrastructure to increase capacity and gain greater cost efficiency.”

– Terry Leggett Senior B2B Analyst

This report looks at the following areas:

- Is the modernisation of existing data centres offsetting demand for new centres?
- Will out-of-town developments challenge the early domination of city centre models?
- Will the sector continue to attract private equity funding?
- Will the fragmented sector increase in concentration?
- How are company strategies changing to accommodate market developments?

Colocation data centre revenues are set for continued growth, with the sector highly attractive to investors. Technological developments focussing on improved efficiency are encouraging continued modernisation of facilities, which is starting to contribute to something of a barrier to market entry. M&A activity is emerging but the sector remains highly fragmented.

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