

Data Centres - UK - May 2017

Report Price: £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



“As was widely expected, the UK data centre sector is evolving. It remains highly fragmented, but there are signs of increasing concentration. The sector’s very strong growth prospects all point to significant further M&A activity, with the sector proving attractive to venture capitalists.”

– Terry Leggett Senior B2B Analyst

This report looks at the following areas:

- What are the driving forces for data centre development?
- Will out-of-town developments challenge the early dominance 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?

A data centre (sometimes spelled datacentre) is a centralised repository, either physical or virtual, for the storage, management, and dissemination of data and information organised around a particular body of knowledge or pertaining to a particular business. A data centre is a dedicated space where companies can keep and operate most of the ICT infrastructure that supports their business, including the servers and storage equipment that run application software, and process and store data and content. For some companies, this might be a simple cage or rack of equipment, for others it could be a room housing a few or many cabinets, depending on the scale of their operation.

**BUY THIS
REPORT NOW**

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

Data Centres - UK - May 2017

Report Price: £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Executive Summary

The market

- Figure 1: UK market for colocation data centres, 2015-21
- Figure 2: UK analysis of data centres, by type, 2016
- Figure 3: UK analysis of data centres, by raised floor space, 2016
- Figure 4: UK analysis of data centres, by revenue function, 2016
- Figure 5: Segmentation of the UK market for IT services by industry, 2016
- Figure 6: UK data centre usage, by industry, 2016

Size of end user

- Figure 7: UK data centre usage, by size of company, 2016
- Figure 8: UK analysis of colocation data centre locations, by, country, 2017

Market factors

- Figure 9: Proportion of businesses with Internet access, by size of company, 2015
- Figure 10: UK cloud computing market, 2012-16

Companies

What we think

Key Insights

- Why is the sector attracting M&A activity?
- What is the customer base?
- Is the UK advanced in the global market?

Introduction

Definitions

Methodology

Abbreviations

Market positioning

- Figure 11: World analysis of colocation data centre locations, 2017
- Figure 12: UK role in the Western European market for colocation data centres, 2017

UK Economy

Overview

- Figure 13: Forecast GDP development 2017-21
- Figure 14: UK GDP quarterly development, 2004-17
- Figure 15: UK GDP in economic downturns and recoveries since 1979

Inflation

Interest rates

House prices

- Figure 16: UK house price changes, 2006-17

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Data Centres - UK - May 2017

Report Price: £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Consumer spending

Manufacturing

Figure 17: UK manufacturing, 2014-17

Business investment

Figure 18: UK GFCF 2003-16

Imports

Exports

Market Factors

Key points

Market factors

Internet access and usage

Figure 19: Worldwide Internet usage, by region, 2010-16

Figure 20: Proportion of businesses with Internet access, by size of company, 2011-15

Figure 21: Proportion of businesses with broadband, by size of company, 2011-15

Figure 22: Proportion of businesses by maximum contracted internet connection speed, by size of company, 2011-15

Cloud computing

Figure 23: UK cloud computing market, 2012-16

Market Size and Forecast

Key points

Market size and forecast

The context

The UK market

Figure 24: UK market for colocation data centres, 2015-21

Market Segmentation

Key points

Market segmentation

Types of data centres

Figure 25: UK analysis of data centres, by type, 2016

Figure 26: UK analysis of data centres, by raised floor space, 2016

Data centre functions

Figure 27: UK analysis of data centres, by revenue function, 2016

Type of end user

Figure 28: Segmentation of the UK market for IT services by industry, 2016

Figure 29: UK data centre usage, by industry, 2016

Size of end user

Figure 30: UK leading web hosting operators, 2017

Figure 31: UK data centre usage, by size of company, 2016

Geographic breakdown

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Data Centres - UK - May 2017

Report Price: £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 32: UK analysis of colocation data centre locations, by, country, 2017

England

Figure 33: Major data centre locations in England, 2017

Scotland

Figure 34: Major data centre locations in Scotland, 2017

Wales

Figure 35: Major data centre locations in Wales, 2017

Northern Ireland

Market Trends

Key points

Market trends

Capacity

Energy usage

Security

Flexibility

Data Center Infrastructure Management (DCIM) Systems

Standardisation

Connectivity

Regional development

Industry Structure

Key points

Industry development

Company profiles

Colt Technology Services

Figure 36: Financial analysis of Colt Technology Services, 2011-15

Company strategy

Equinix

Figure 37: Financial analysis of Equinix (UK), 2011-15

Company strategy

Global Switch

Figure 38: Financial analysis of Global Switch, 2012-16

Company strategy

Interxion

Figure 39: Financial analysis of Interxion Europe, 2011-15

Company strategy

Iomart Group

Figure 40: Financial analysis of Iomart Group, 2012-16

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Data Centres - UK - May 2017

Report Price: £995.00 | \$1288.43 | €1182.46

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Company strategy

Level 3 Communications

Figure 41: Turnover development of Level 3 Communications, 2012-16

Company strategy

Next Generation Data

Figure 42: Financial analysis of Next Generation Data, 2013-15

Company strategy

Pulsant/Onyx Group

Figure 43: Financial analysis of Onyx Information Technology Holdings, 2011-15

Figure 44: Financial analysis of Pulsant, 2011-15

Company strategy

Telehouse International Corporation of Europe

Figure 45: Financial analysis of Telehouse International Corporation of Europe, 2011-16

Company strategy

**BUY THIS
REPORT NOW**

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com