

Nordic Data Centre Market Overview

Datacenter Forum

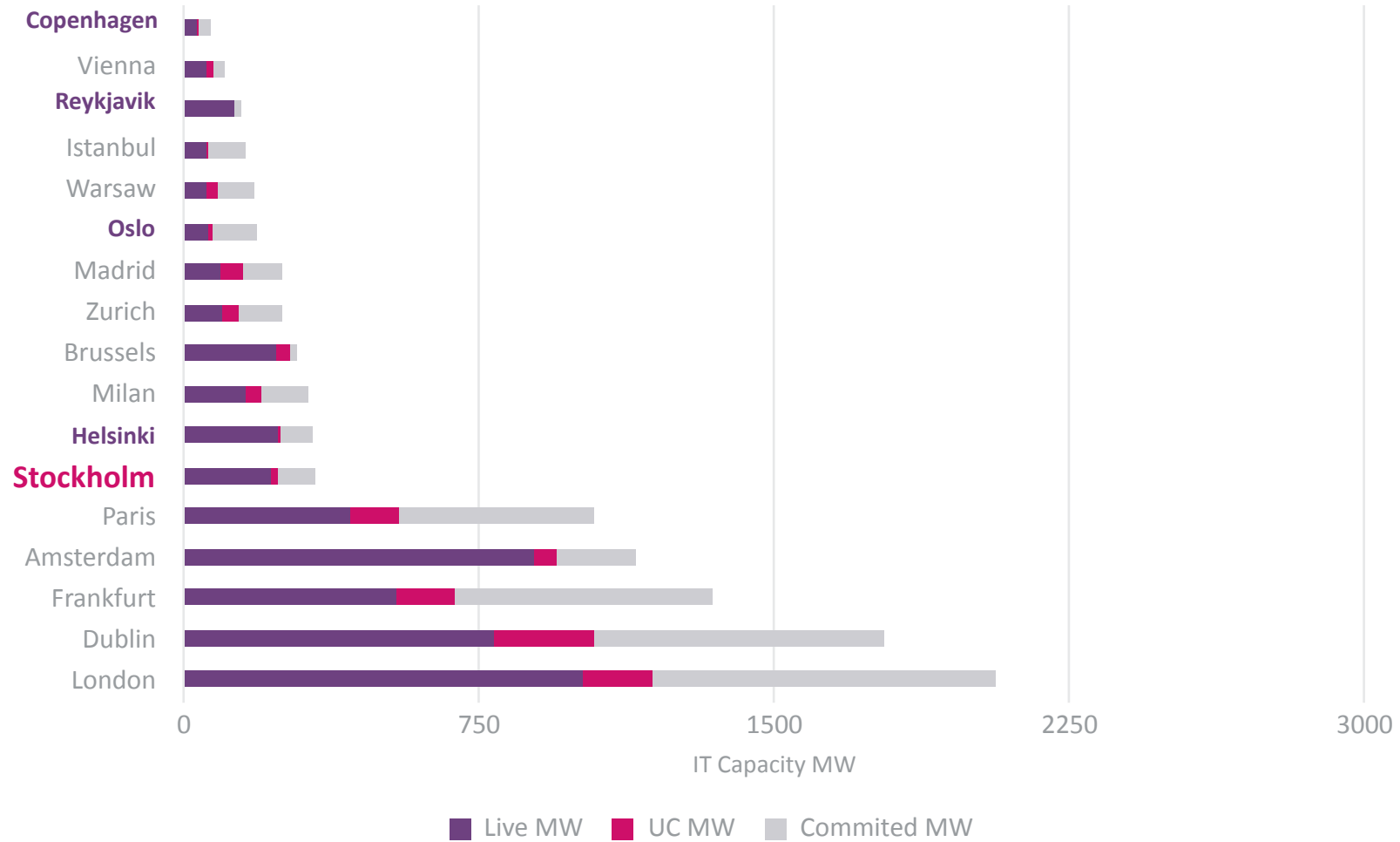
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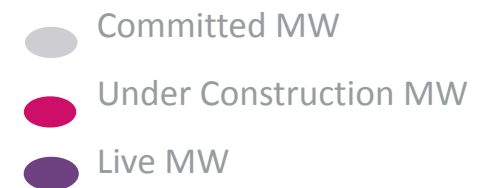
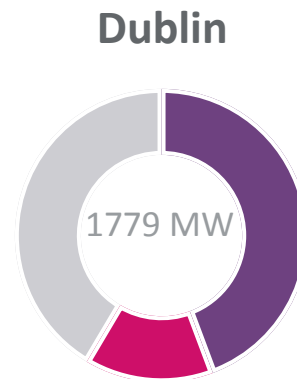
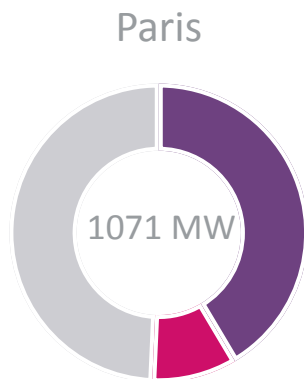
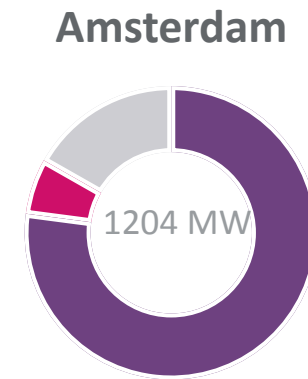
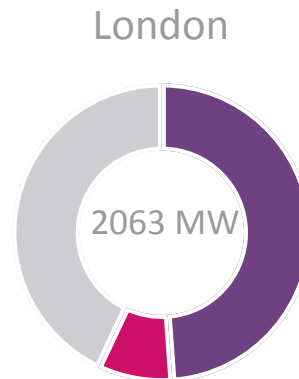
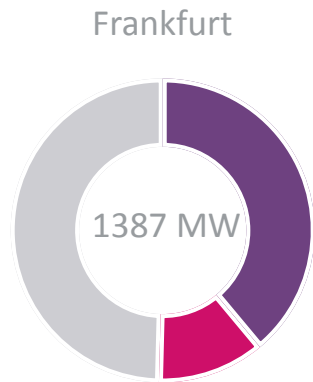


- Denmark
- Djibouti
- Egypt
- Equatorial Guinea
- Eritrea
- Estonia
- Lithuania
- Faroe Islands
- Finland
- France
- Gabon
- Gambia
- Georgia
- Germany
- Ghana
- Gibraltar
- Greece
- Guernsey
- Guinea
- Guinea-Bissau
- Hungary
- Iceland
- Iran
- Iraq
- Ireland
- Isle Of Man
- Israel
- Italy
- Ivory Coast
- Jersey
- Jordan
- Kenya
- Kuwait
- Latvia
- Lebanon
- Lesotho
- Liberia
- Libya
- Liechtenstein
- Lithuania
- Luxembourg
- Macedonia
- Madagascar
- Malawi
- Mali
- Malta

Europe – Metro Markets Comparison

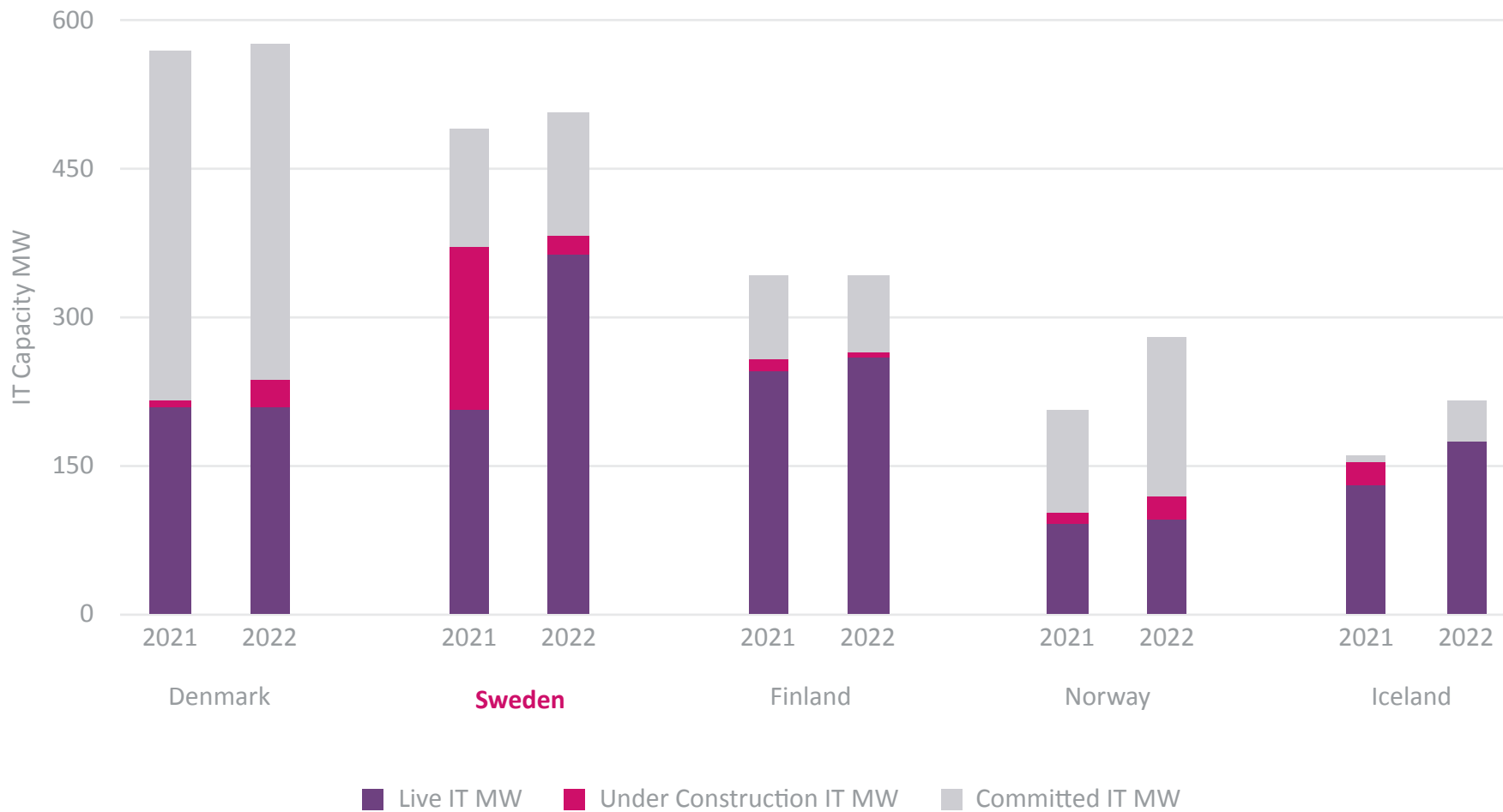
Supply Pipeline – Q2 2022





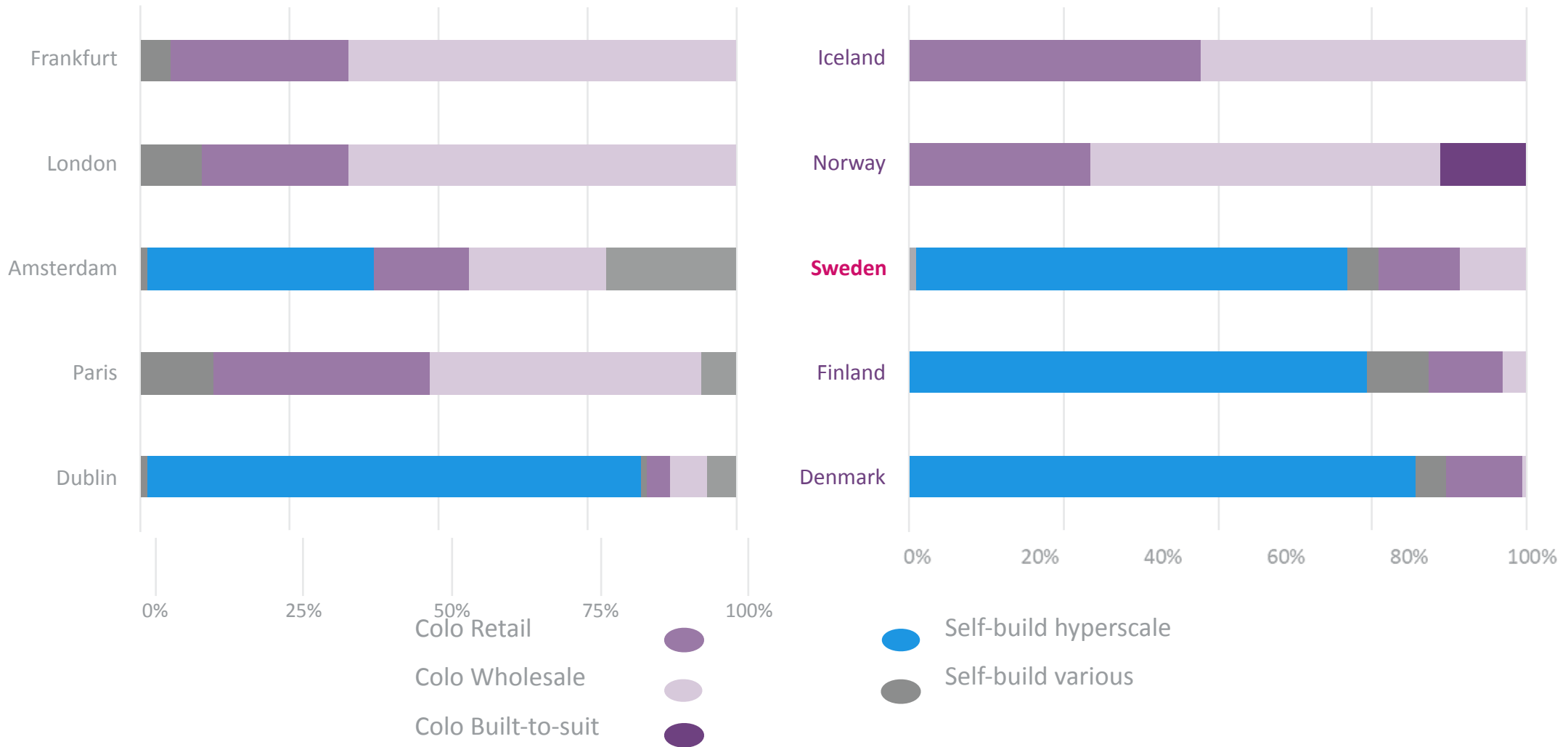
Nordics: National Markets Overview

2021 Q2 / 2022 Q2



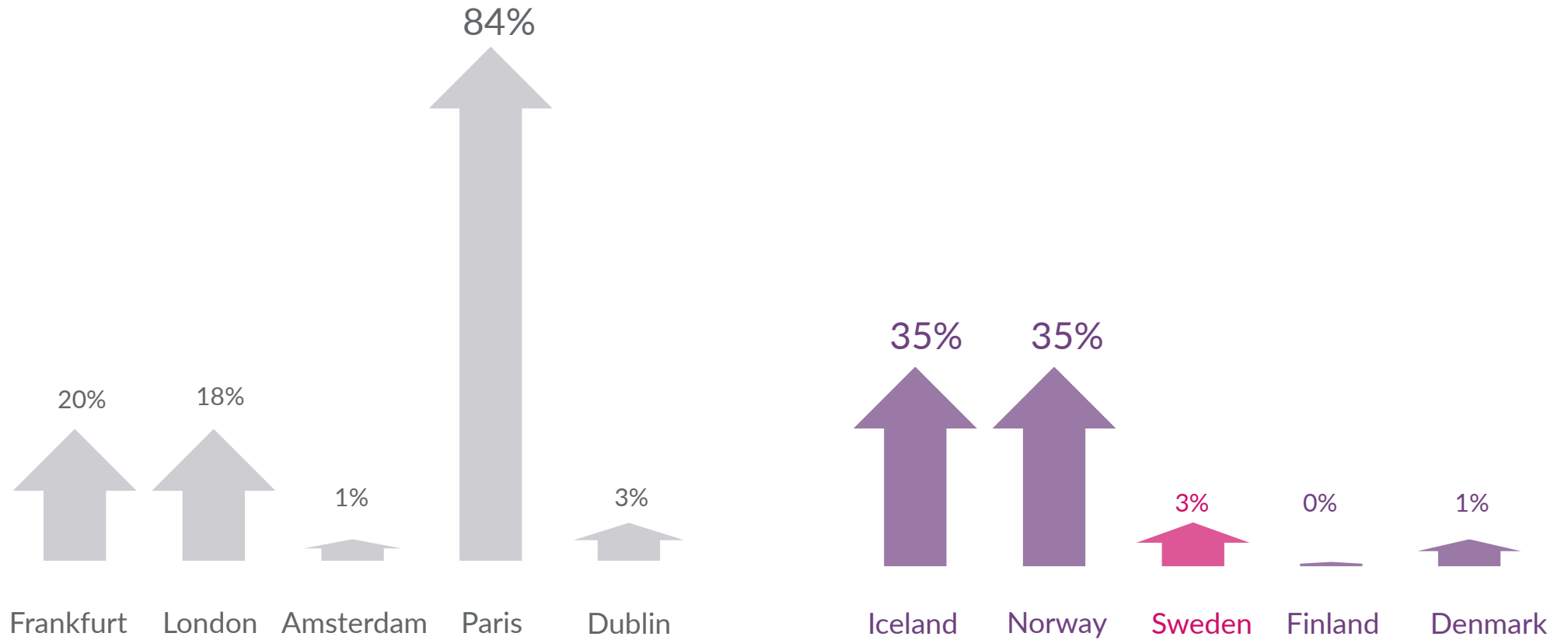
FLAP-D Vs Nordic National Markets

Market Composition by Operator Type - Live Q2 2022



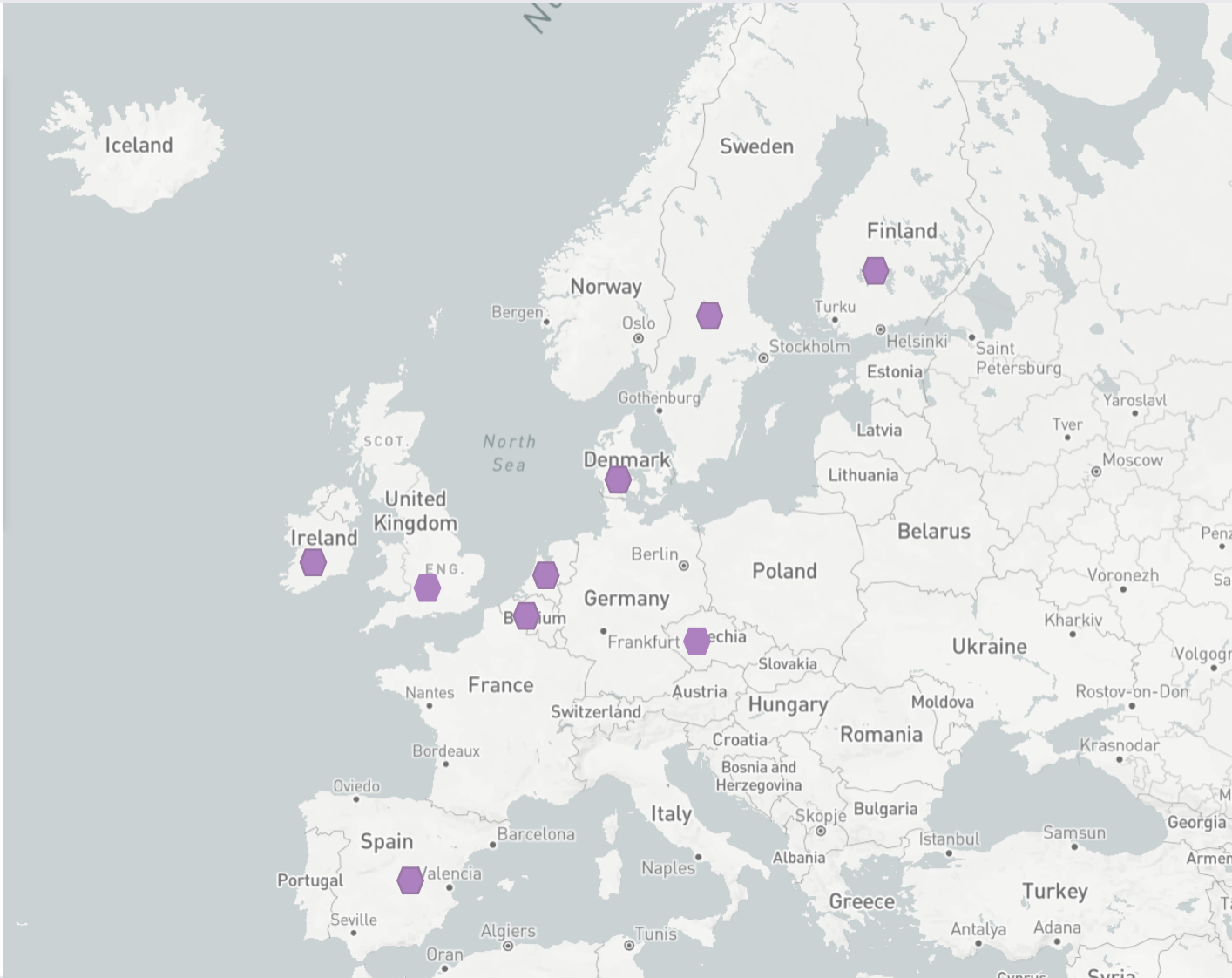
FLAP-D Vs Nordic National Markets

Increase in Total Supply Pipeline in 1 year - Q2 2021 - Q2 2022



Europe

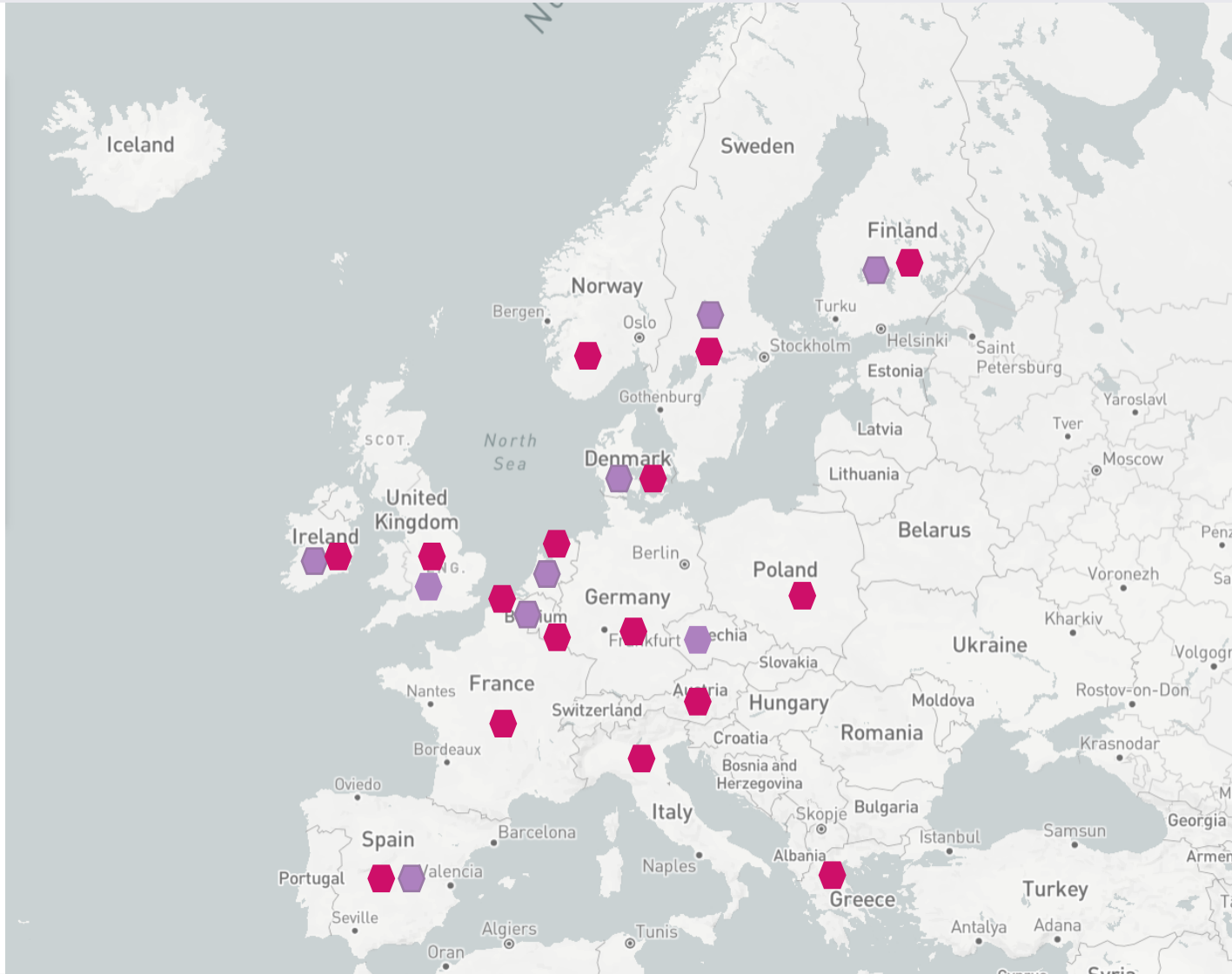
Self-build Hyperscale Activity before and in 2019





Hexagon symbol: Hyperscale presence in the country prior and in 2019.

Europe

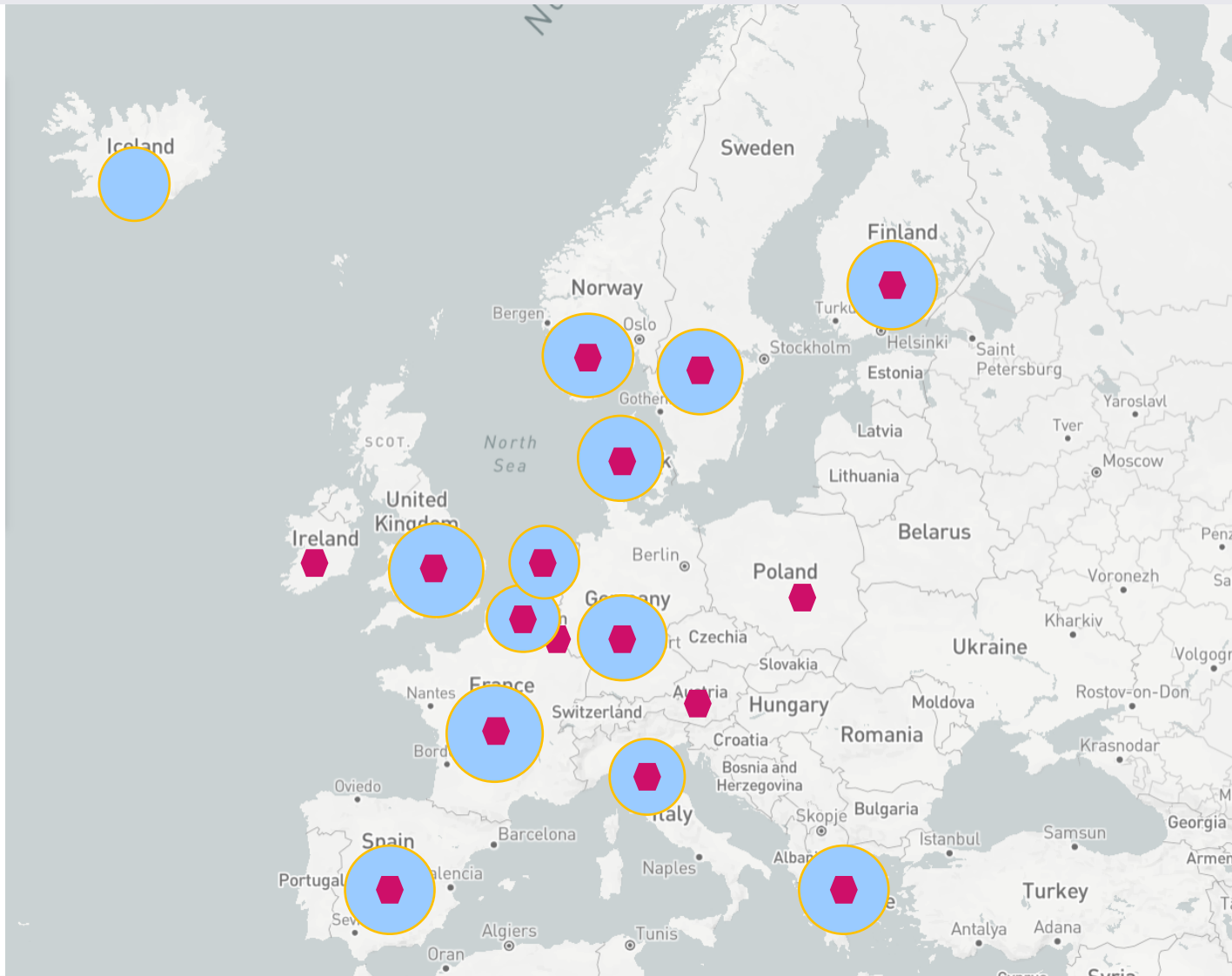
Self-build Hyperscale Activity 2020 onwards





-  Hyperscale presence in the country prior and in 2019.
-  Hyperscale presence in the country from 2020.

Europe

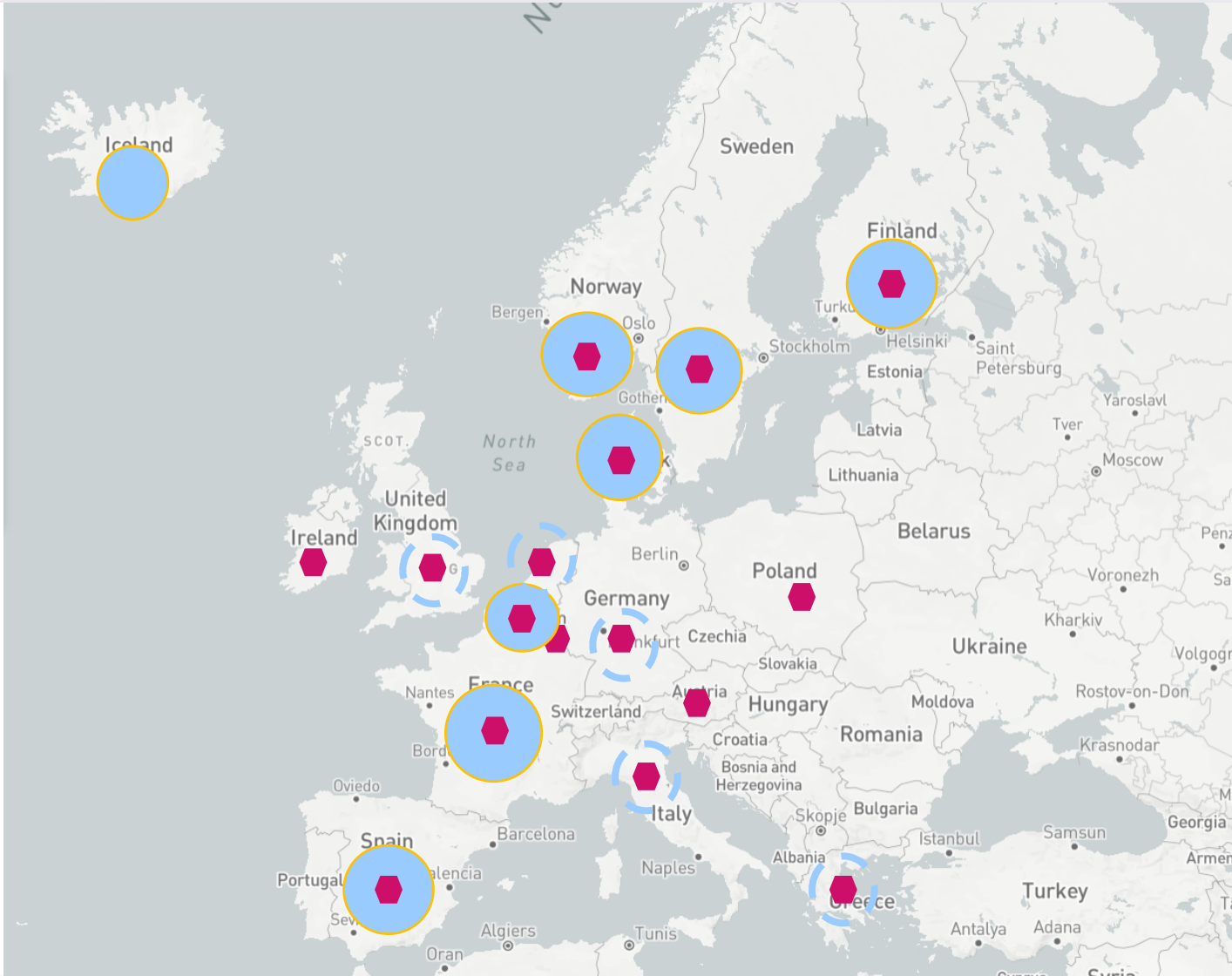
Self-build Hyperscale Activity Vs Low-Carbon Emissions Markets



-  Hyperscale investments in the countries since 2020.
-  At least 50% of electricity consumed by a country is low in carbon emissions.

Europe

Self-build Hyperscale Activity Vs Low-Carbon Emissions Markets



Hyperscale investments in the countries since 2020.



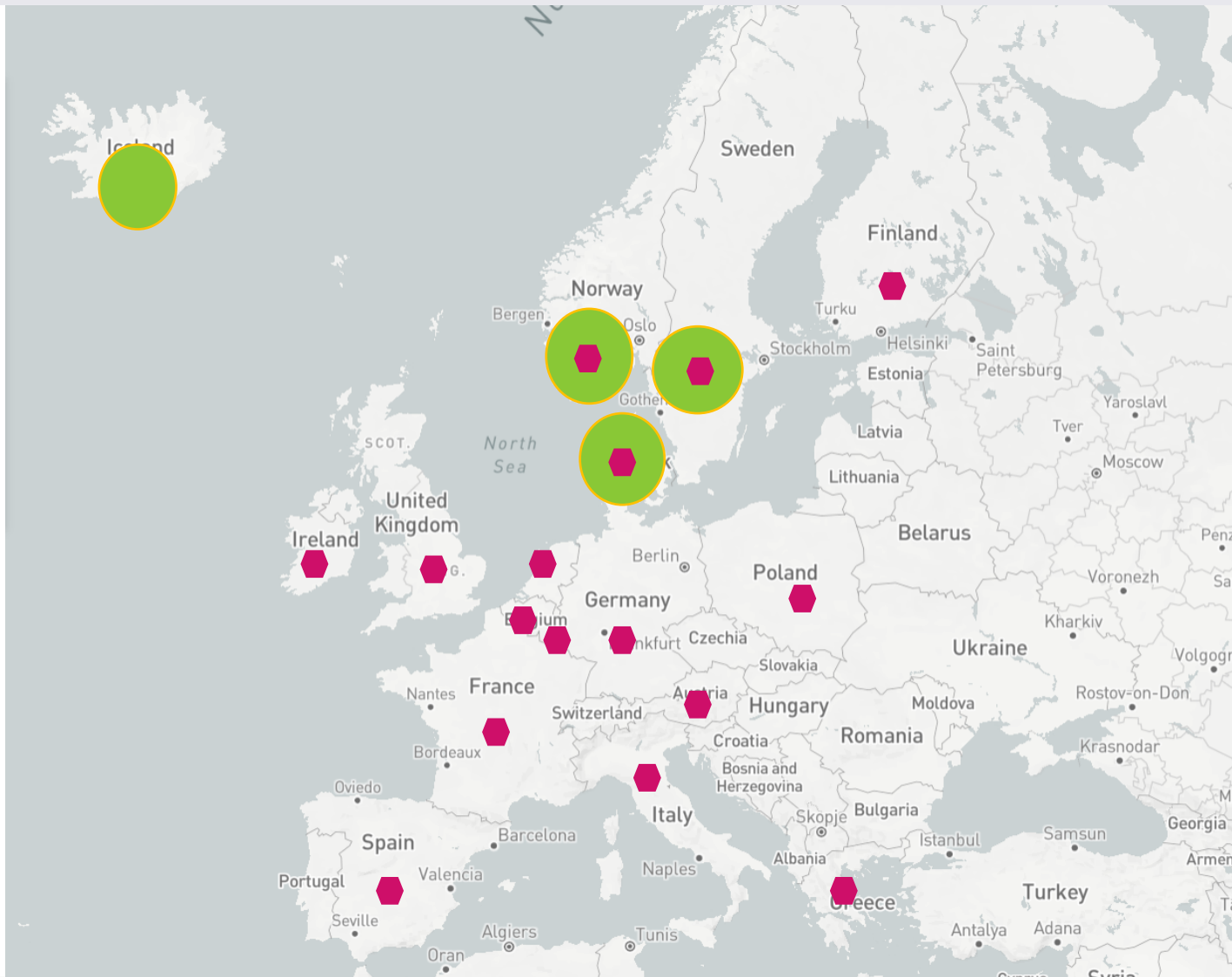
At least 70% of electricity consumed by a country is low in carbon emissions.





At least 50% of electricity consumed by a country is low in carbon emissions.

Europe

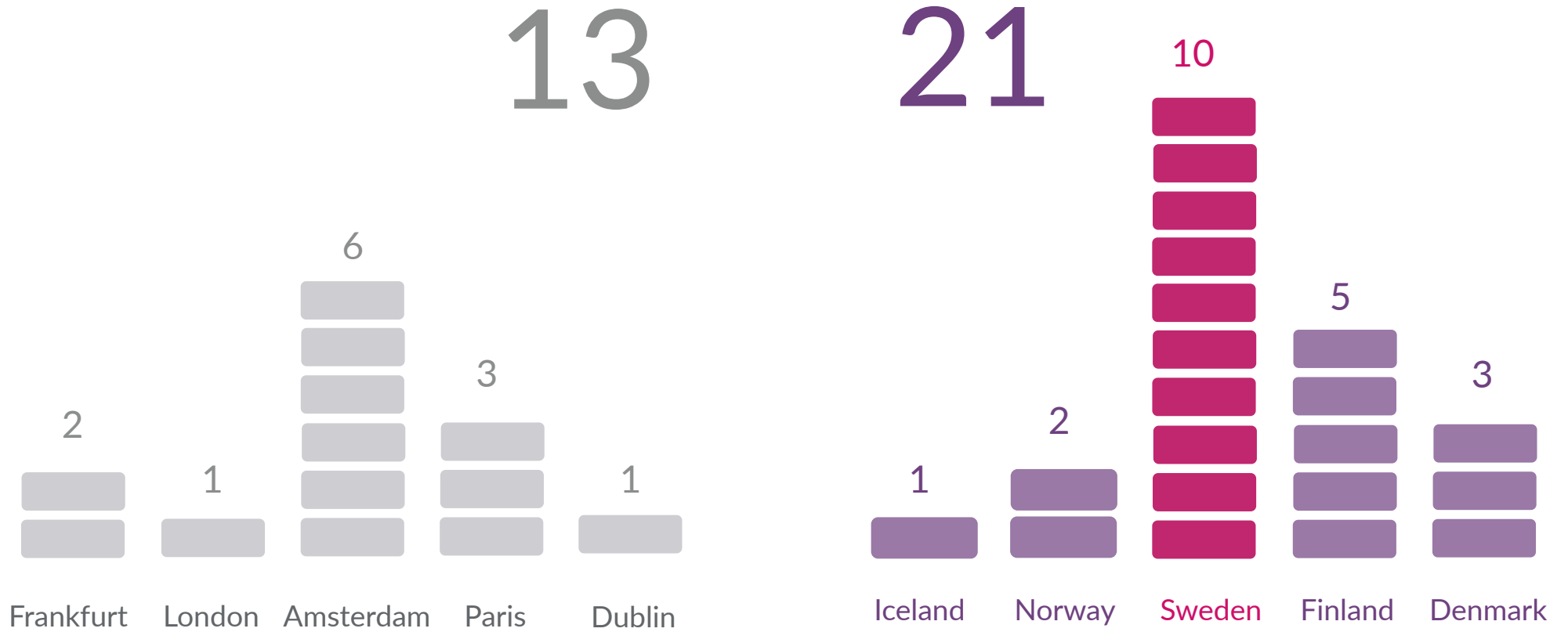
Self-build Hyperscale Activity Vs High in Renewables Consumption Markets



-  Hyperscale investments in the countries since 2020.
-  At least 50% of electricity consumed by a country is coming from renewable sources.

FLAP-Ds Vs Nordic National Markets

Data Centre Campuses Already Reusing Heat



Source: IMPELEON; DC Byte

The rising costs of land and power limitations in foreign grids are expected to shift demand from FLAP-D markets to other regions, including Nordics.

Sustainability measures are perceived to be a major driver towards new data centre developments.

Thank you