DCByte

Helsinki

CITY FOCUS ON HELSINKI
REPORT PREPARED IN PARTNERSHIP WITH

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DC Byte is a data centre research and analytics platform. We map data centres around the world and track the developments of new supply, sold power, available capacity, supplier details and market acquisitions. The in depth granularity of our data help businesses to stay up to date with the latest data centre developments and the risks or benefits that entail entering a specific market.

https://dcbyte.com/

DATACENTER FORUM

Founded in 2014, Datacenter Forum is home to the biggest community of data centre professionals in the Nordics. It hosts events throughout the region that bring together vendors, operators, and other stakeholders across the data centre industry and wider information technology & digital infrastructure sector. As of 2022, Datacenter Forum hosts events in Norway, Finland, Denmark, Iceland, and Sweden.
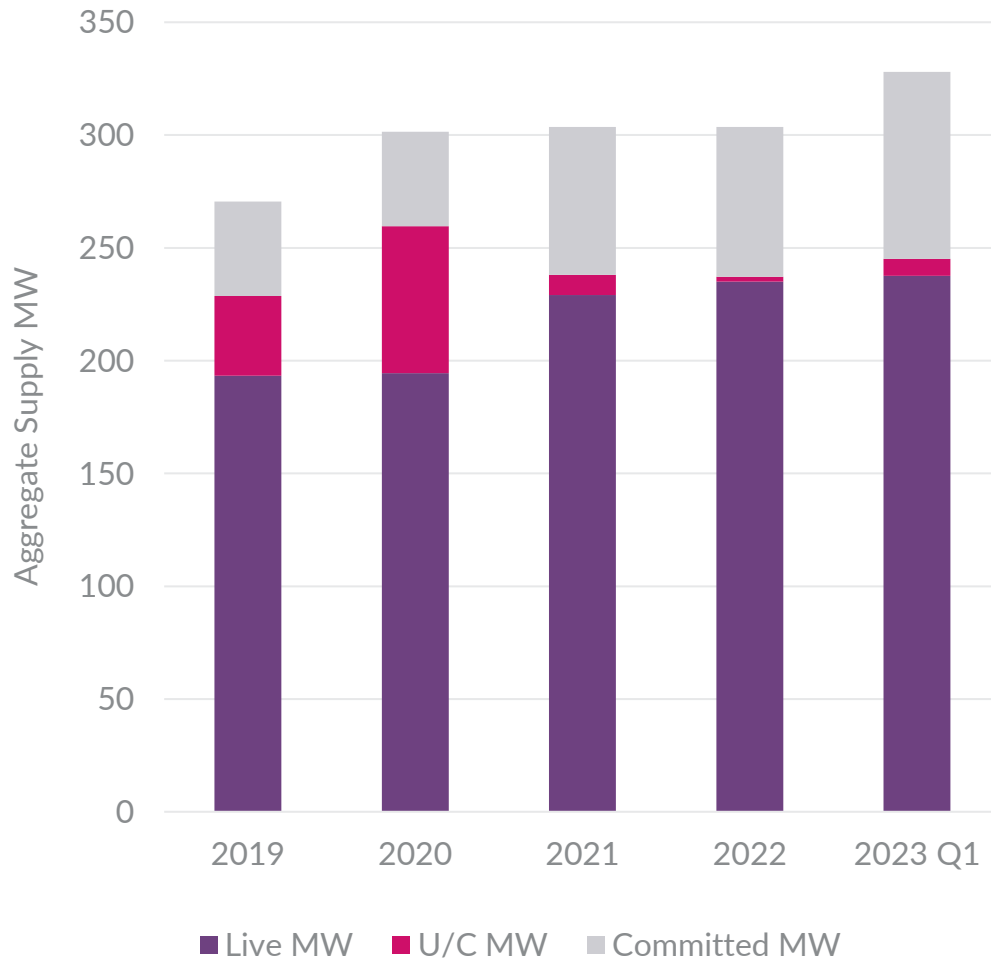
https://datacenter-forum.com

The increase in demand outside of the FLAP-D markets continued in 2022. Helsinki was one of the markets that attracted a number of large, long-term investments.

• Microsoft announced 3 data centre campuses to be built in Finland.

• Digital 9 Infrastructure acquired Ficolo for €135 million. Rebranded as Verne Global Finland.

• Hyperco acquired a data centre from TS-Yhtymä for €35 million. Announced two new, 50MW data centre projects.

• atNorth invested into Finland – acquired 2 Advania data centres with intentions to build a third one.

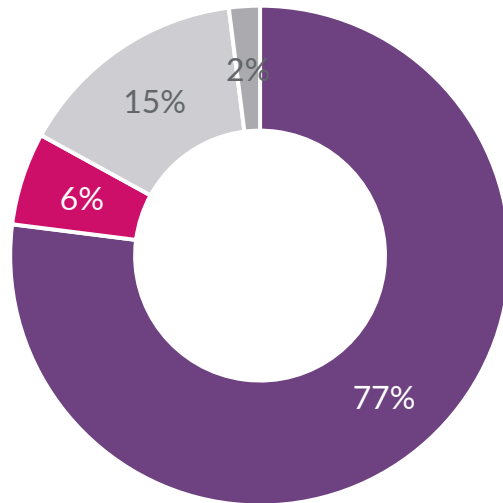• Digita opened a new data centre in Helsinki.

But for some, 2022 came with its own challenges, namely Yandex data centres, which was forced to rethink its operations strategy in the country after geopolitical tensions and supply chain disruptions.

Market Supply
Helsinki

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Aggregate Supply MW

■ Live MW ■ U/C MW ■ Committed MW

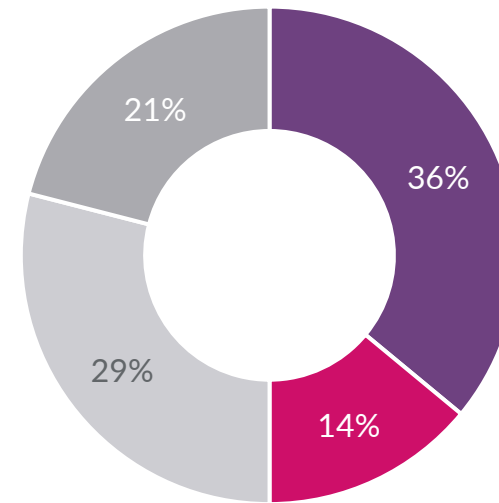The graph illustrates the size of the Helsinki market on a yearly basis since 2019.

Helsinki is the second-largest metro market in the Nordics. Most of its capacity is attributed to a single hyperscale development outside of the capital city. Helsinki is also one of the largest markets in Europe, between Milan and Berlin in size.

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Market Composition and Operator Type
Helsinki
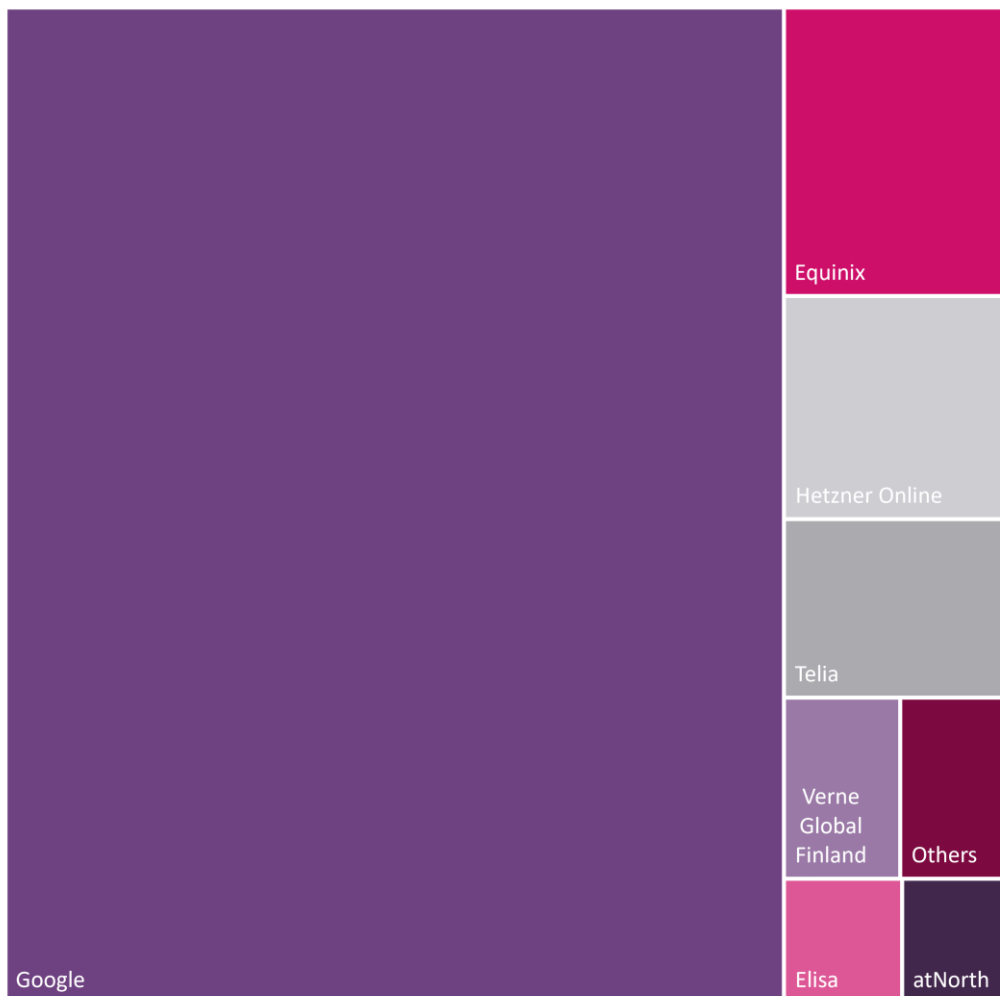
2023 Q1 – Live Power

- Self-build Public Cloud
- Self-build Systems Integrator/Managed Service Providers
- Colo - Retail
- Colo - Wholesale

2023 Q1 – Under Construction and Committed Power

- Self-build Public Cloud
- Self-build Systems Integrator/Managed Service Providers
- Colo - Retail
- Colo - Wholesale

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The table represents the companies that have the largest market share by fitted out and operational capacity in Helsinki in Q1 2023. The chart illustrates the live market share each company has in the market.

Position	Company Name
1	Google
2	Equinix
3	Hetzner Online
4	Telia
5	Verne Global Finland
6	Elisa
7	atNorth

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- Given the power constraints in the FLAP-D's, it is expected that the demand will continue to grow outside of these markets.

- In Finland, it is probable that there won't be many new, large data centre announcements in the short-term as the previously announced capacity is yet to be fitted out. It is expected that most of the new supply will be coming from the players that are already present in the market.

- It is likely that the industry will continue to face public pushback over hyperscale data centre developments which would result into extended timelines.

- A recast of the European Commission's proposed EU Energy Efficiency Directive is expected to strengthen the focus on sustainability, with mandatory requirements to report IT operations data.

- The introduction of reduced electricity tax to qualifying data centres in Finland after Norway and Sweden returned to the original electricity taxation policies could give the country a competitive advantage over neighbouring Nordic countries.

- Finland joining NATO could increase foreign interest into the Finnish and Baltic data centre industries.

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Thank you

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