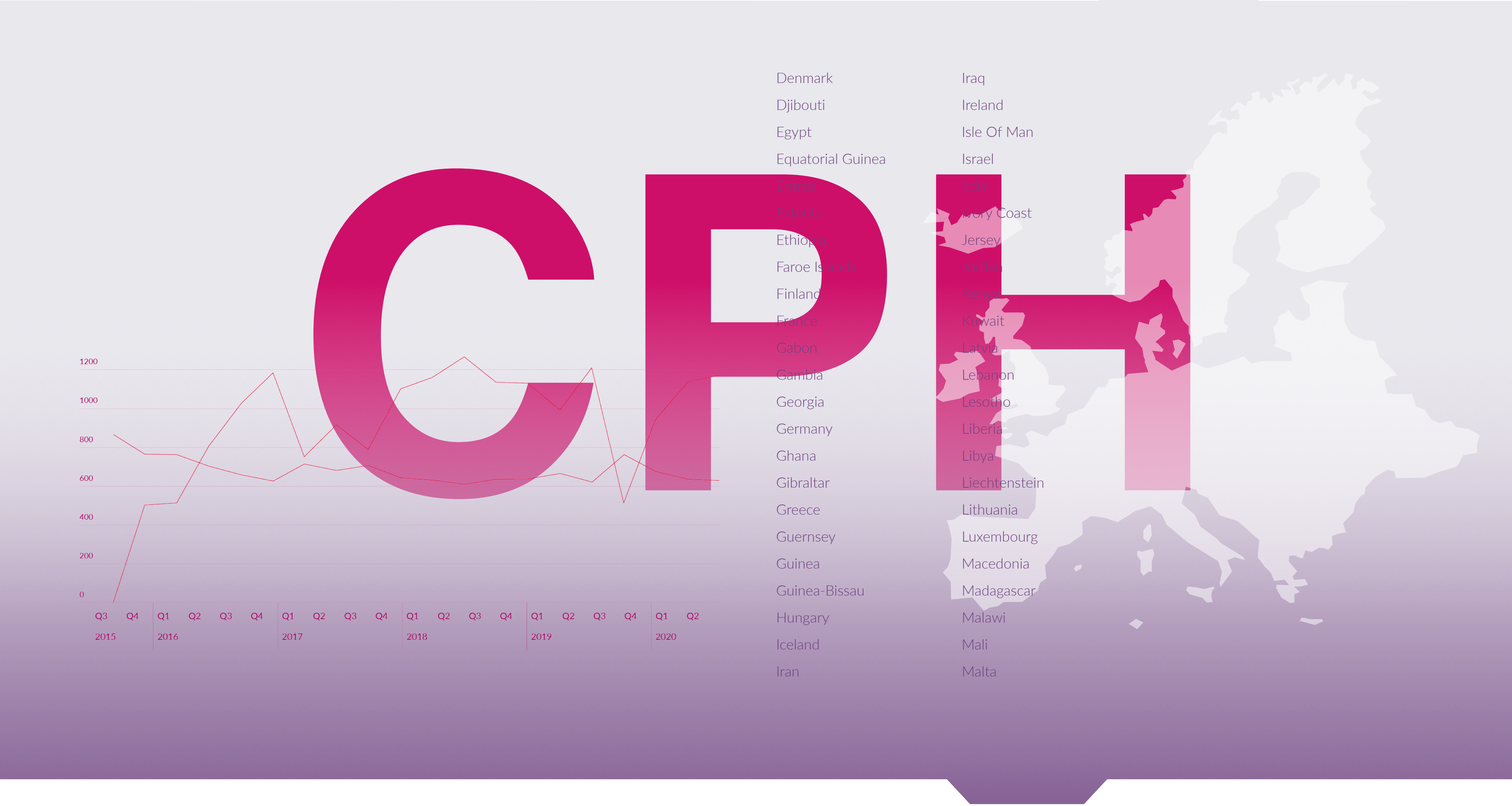
Danish Data Centre Market Overview

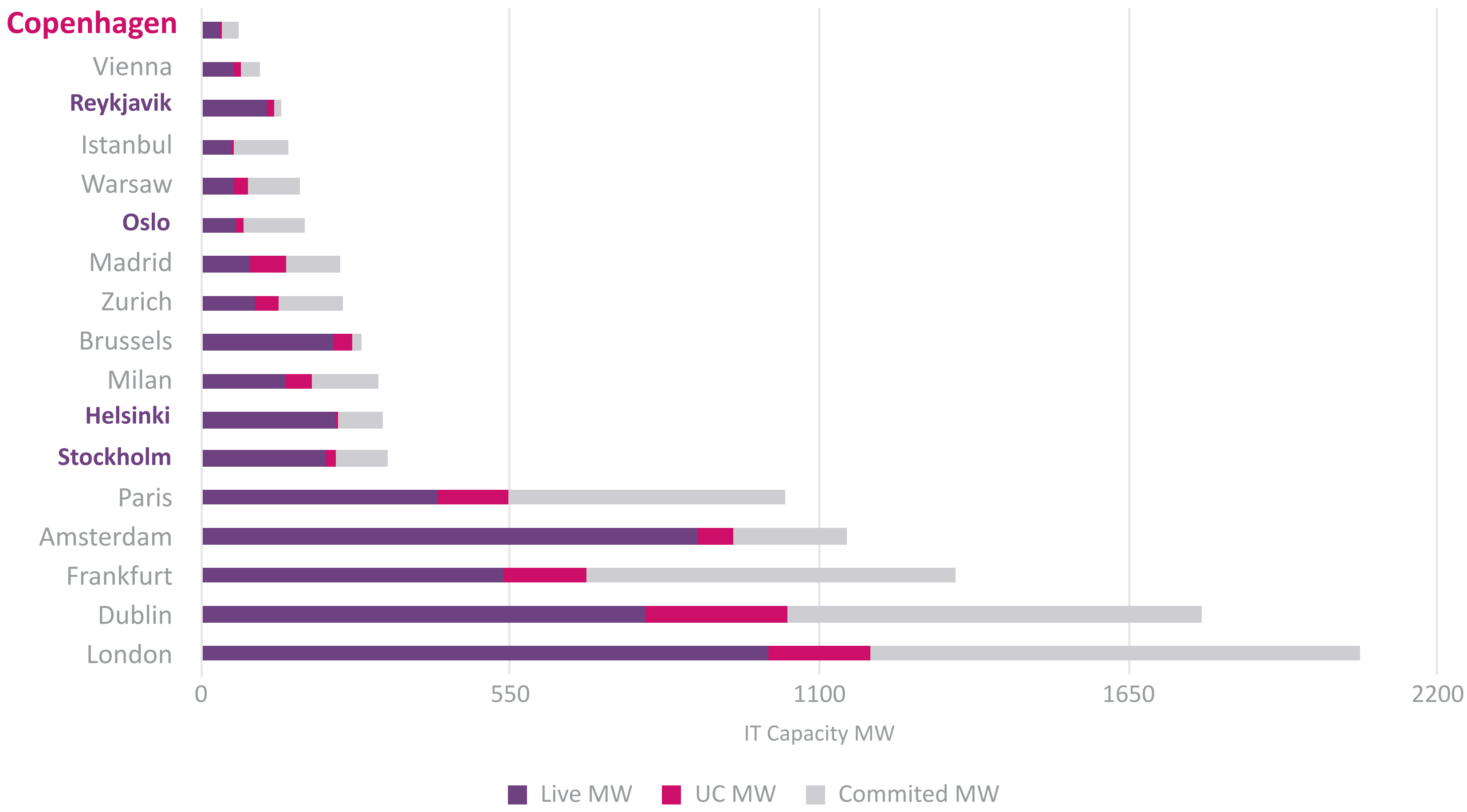
Datacenter Forum

29/09/2022

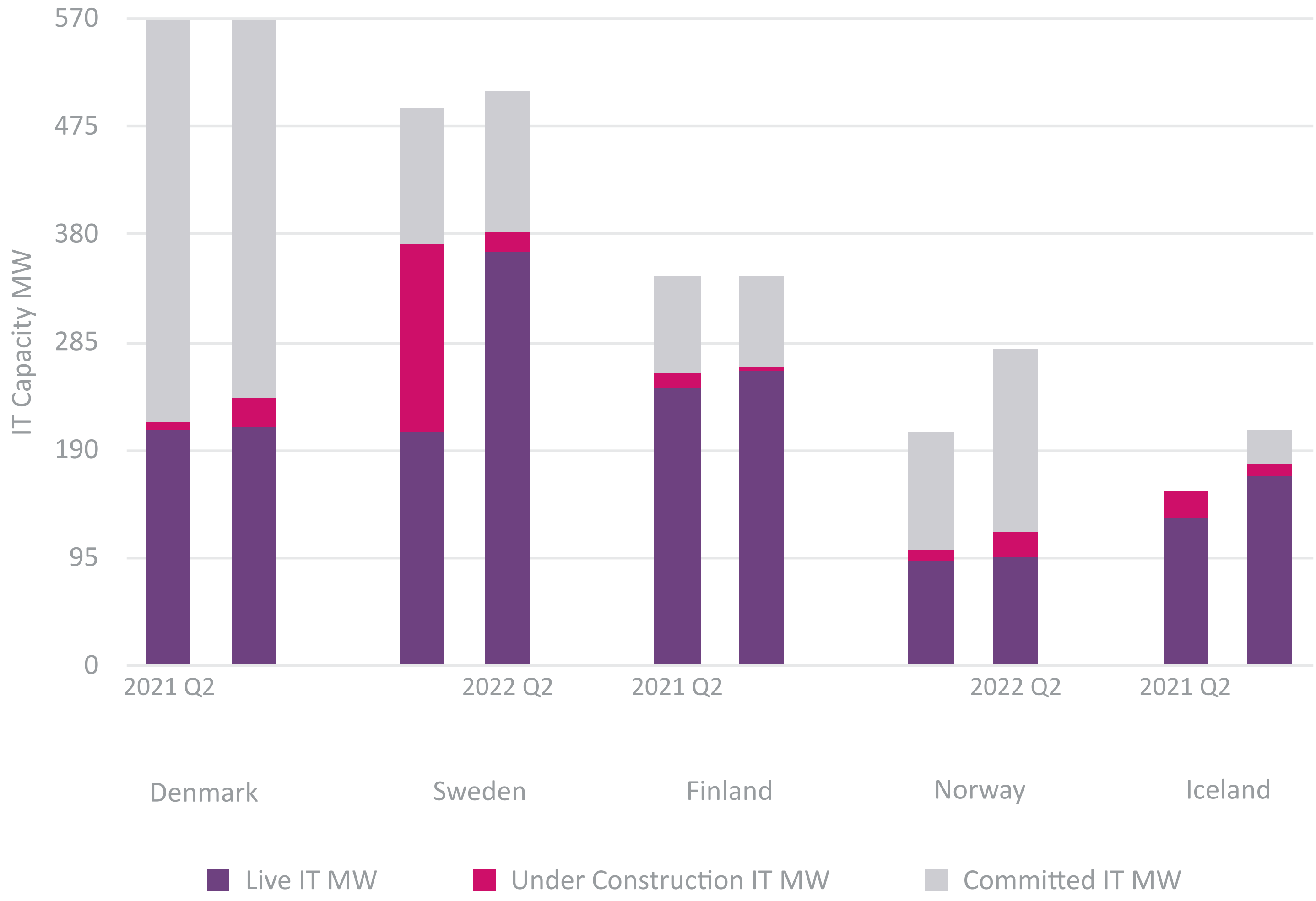


Presentation by Jovita Januskeviciute, Senior Analyst for Nordics

DCByte


Copenhagen
Vienna
Reykjavik
Istanbul
Warsaw
Oslo
Madrid
Zurich
Brussels
Milan
Helsinki
Stockholm
Paris
Amsterdam
Frankfurt
Dublin
London
0
550
1100
1650
2200
IT Capacity MW
Live MW
UC MW
Commited MW

Nordics: National Markets Overview
2021 Q2 / 2022 Q2



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Metropolitan Markets Vs Remaining National Market
Market Composition by Operator Type – Live 2022 Q2

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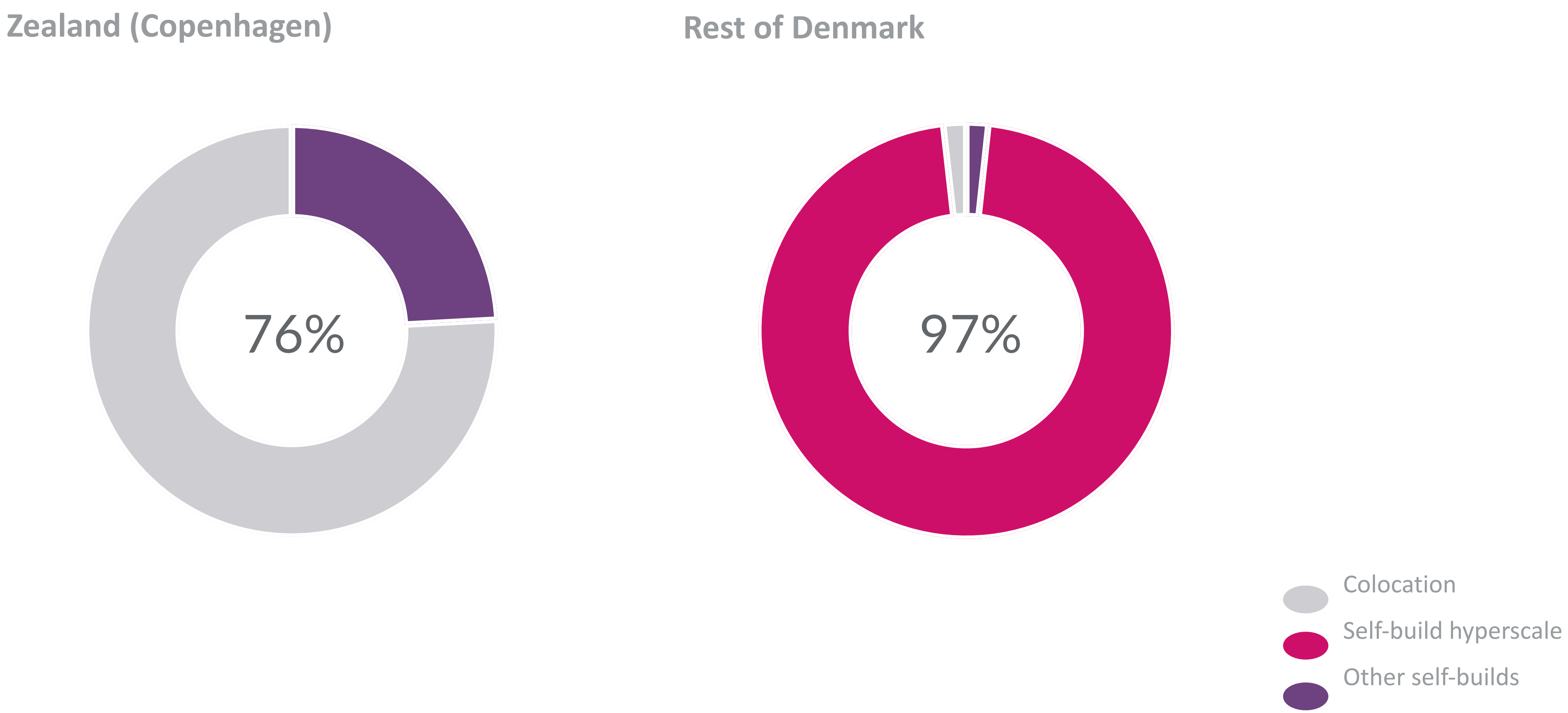
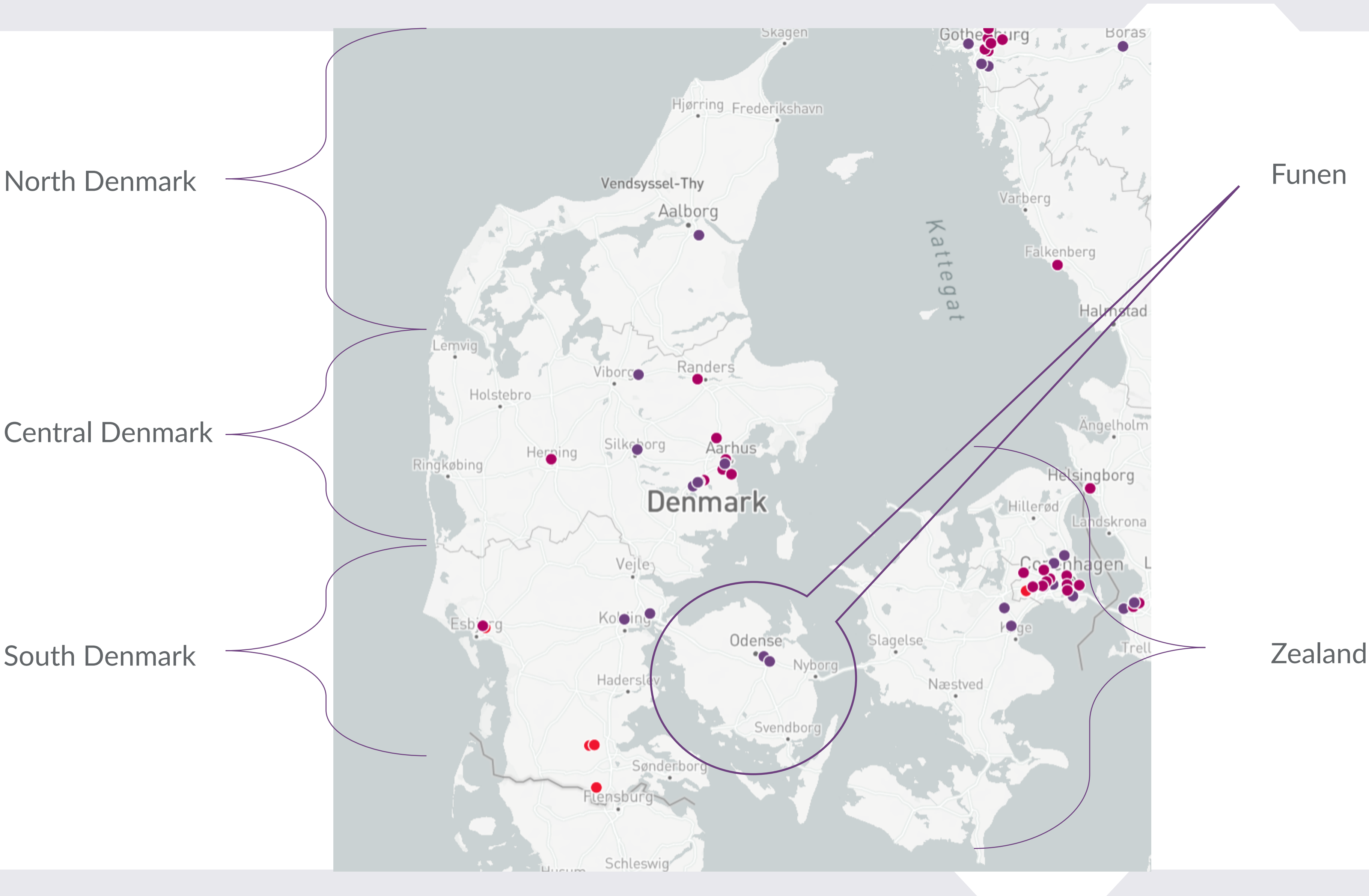
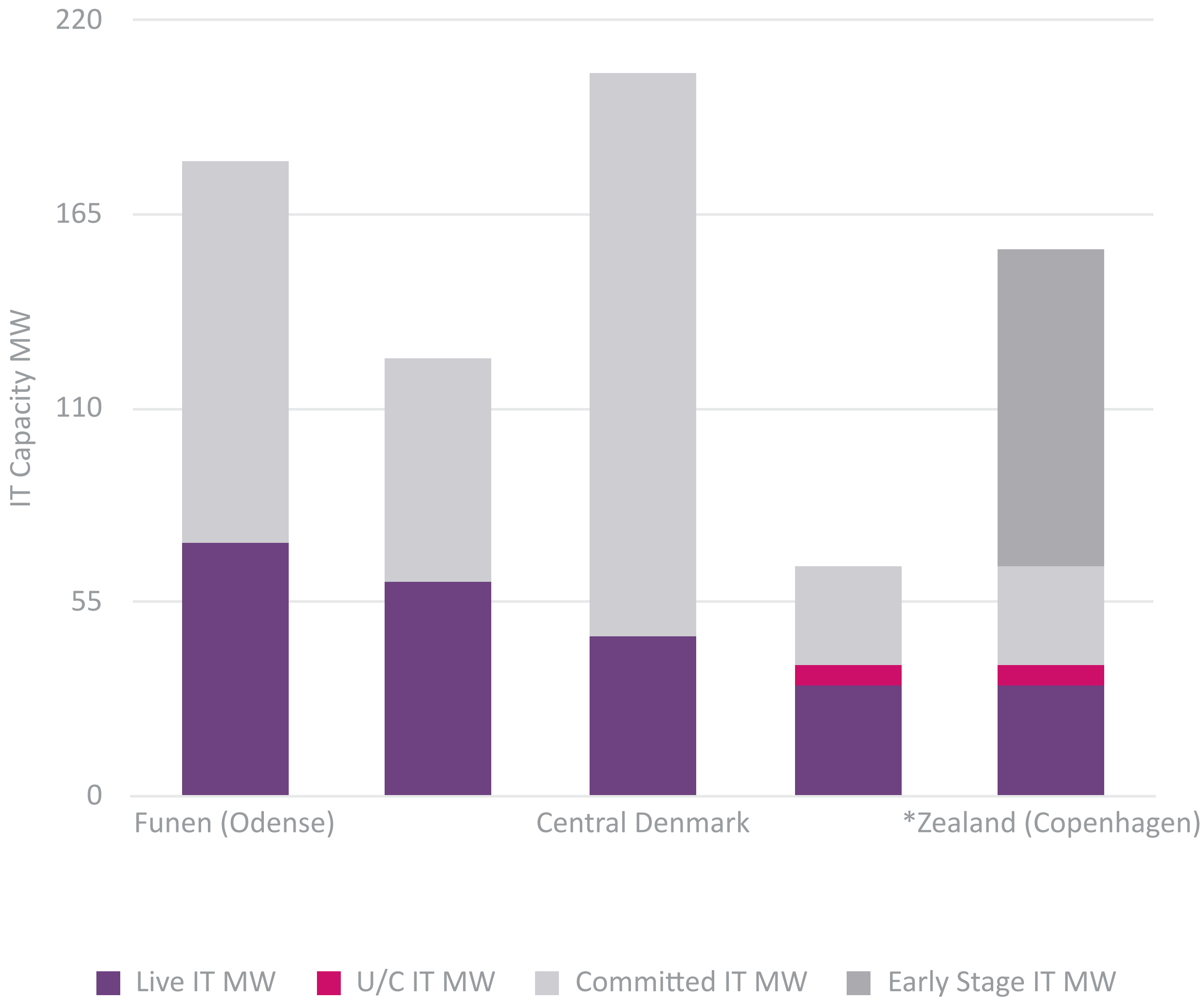
Copenhagen Vs Rest of Denmark
Market Composition by Operator Type – Live 2022 Q2



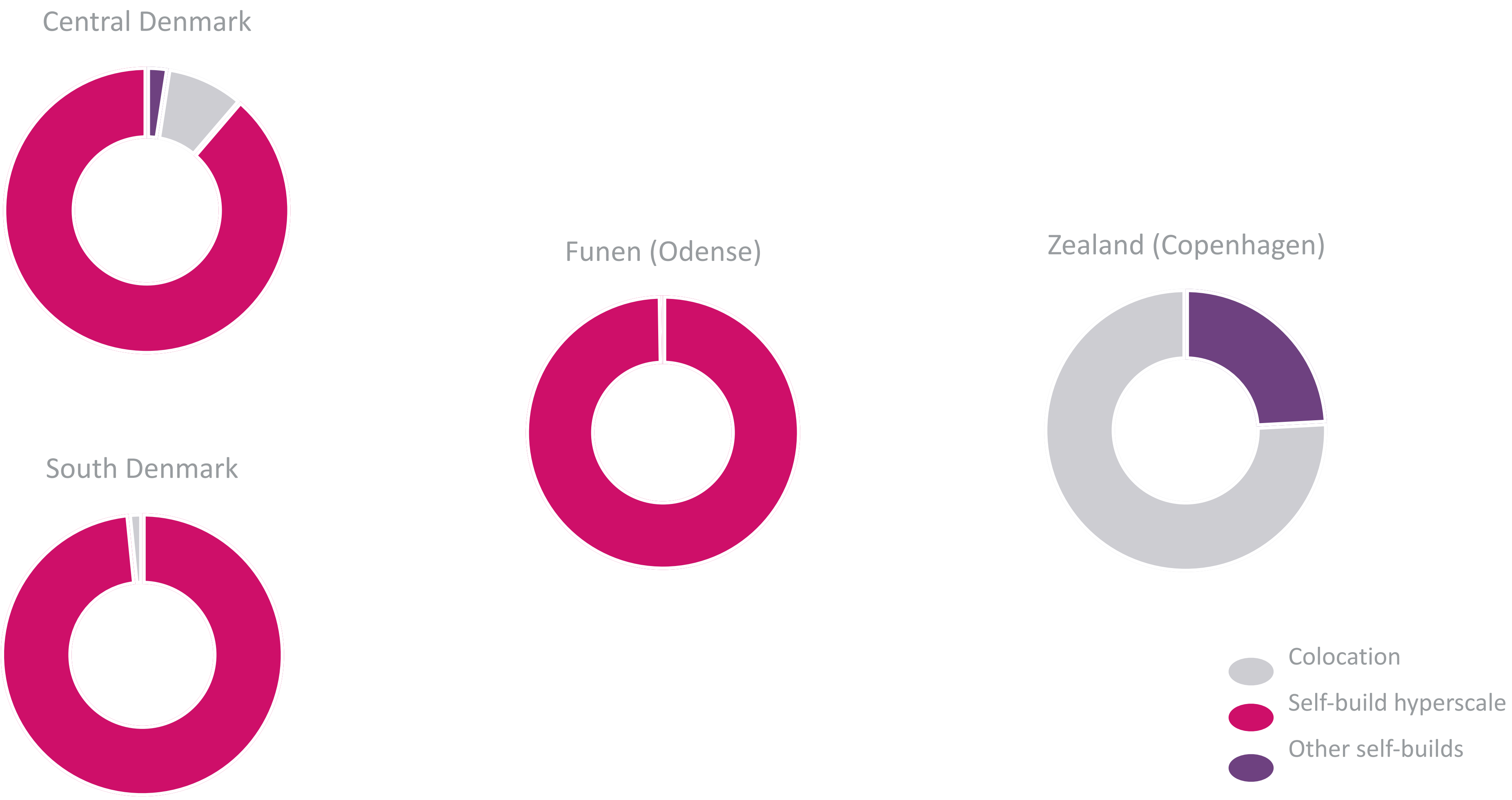

North Denmark
Central Denmark
South Denmark
Funen
Zealand
Skagen
Gothenburg
Boras
Hjørring
Frederikshavn
Vendsyssel-Thy
Aalborg
Kattegat
Varberg
Falkenberg
Halmstad
Lemvig
Viborg
Randers
Holstebro
Ängelholm
Herning
Silkeborg
Aarhus
Ringkøbing
Helsingborg
Denmark
Hillerød
Landskrona
Vejle
Copenhagen
Esbjerg
Kolding
Odense
Slagelse
Nyborg
Haderslev
Næstved
Svendborg
Sønderborg
Flensburg
Schleswig

National Regions Comparison 2022 Q2

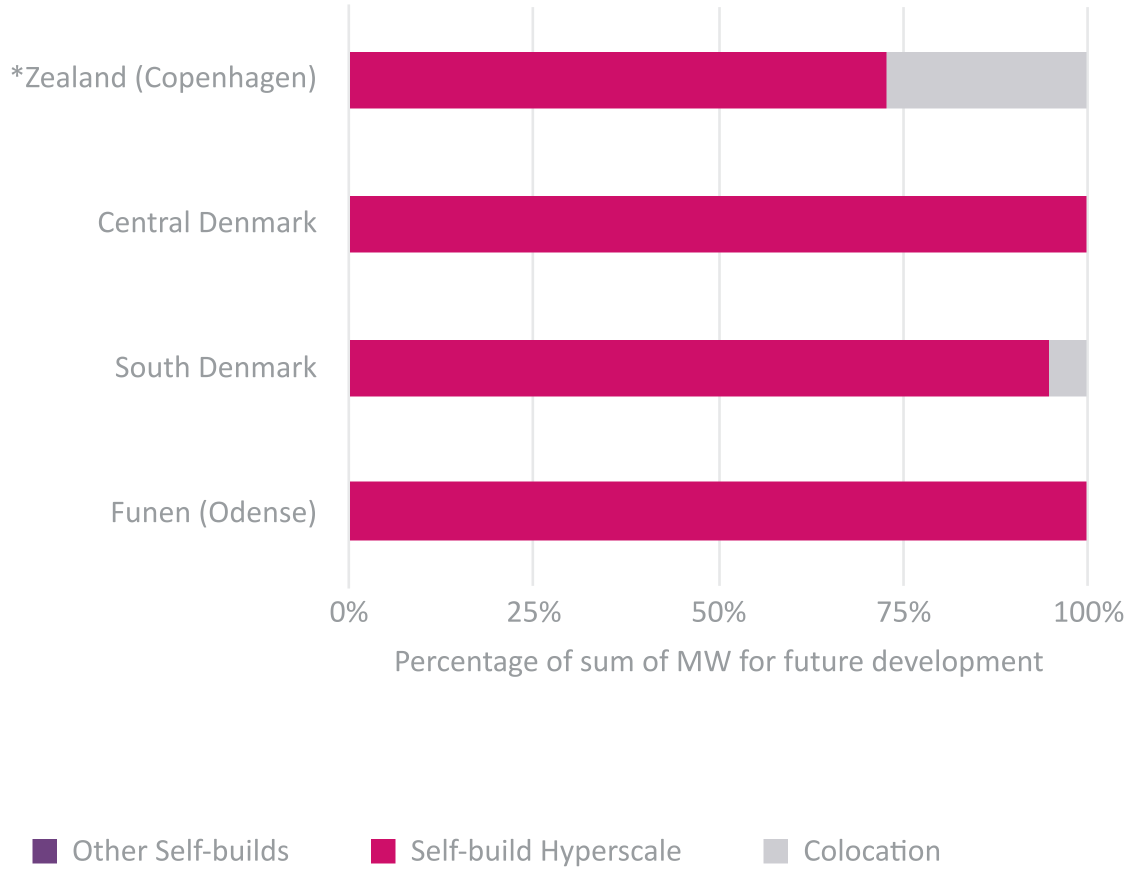


Denmark

Regional Market Share by Live IT Capacity. 2022 Q2

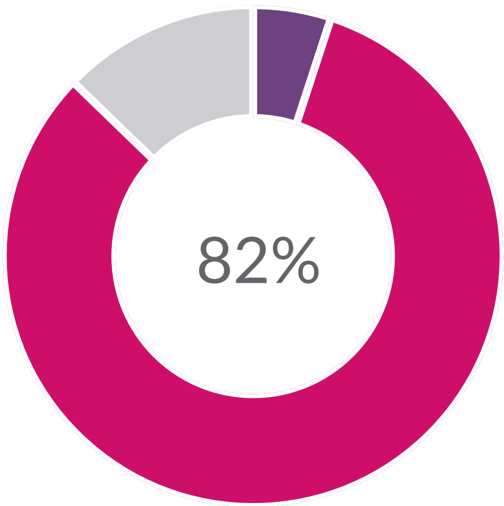


Regional Market Share By Committed And Capacity In Construction – 2022 Q2

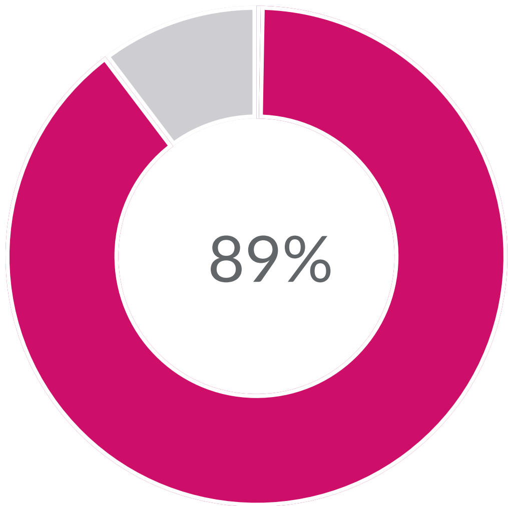


Denmark
Market Composition by Operator Type

Live MW Q2 2022



MW U/C & Committed



Colocation
Self-build hyperscale
Other self-builds

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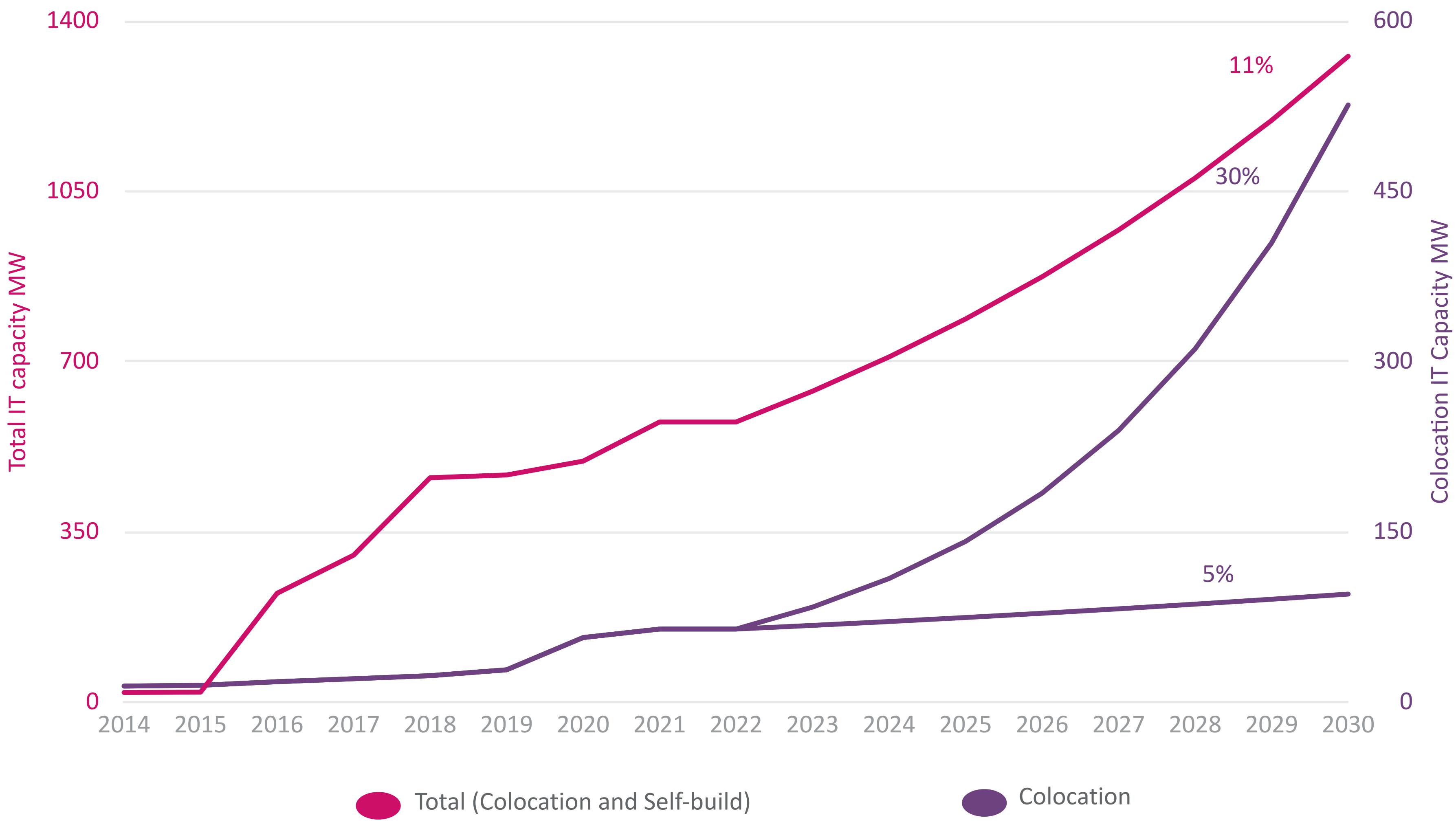
1400
1050
700
350
0
Total IT capacity MW
600
450
300
150
0
Colocation IT Capacity MW
11%
30%
5%
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
2026
2027
2028
2029
2030
Total (Colocation and Self-build)
Colocation

Danish data centre market is expected to double its currently live IT capacity in the future. Most of the growth if anticipated to come from self-built hyperscale deployments.

Major driver behind this growth is sustainability measures and future projects such as the energy islands.

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.

Thank you