EXECUTIVE OVERVIEW

451 Research

NORTH AMERICAN MULTI-TENANT DATACENTER SUPPLY

Top 10 Markets – 2013

DATACENTER

KEY FINDINGS

- Top markets continue to be competitive: The top five markets in North America continue to be the most competitive, with over 30 competitors in each market, on average. Commanding market shares of greater than 25% for the top provider in each market do not start appearing until the second five markets covered in this report.

- Some markets have an excess of supply: Silicon Valley and Atlanta are two areas with an excess supply of wholesale space and Silicon Valley also has excess retail colocation capacity. This has led to pricing pressure in these markets. Other areas experiencing pricing pressure include Dallas, Northern Virginia and New York/New Jersey, although we believe this is due more to competitors' trying to take market share than to sustained oversupply.

- M&A opportunities available: Given the number of smaller datacenter providers in each market (from a single facility to a handful of facilities), increasing utilization of built capacity, continued lack of access to capital for the smaller datacenter providers to expand and increasing demand for emerging major markets, several of the smaller companies in these markets make attractive acquisition targets for companies looking to expand into additional emerging major markets more quickly than by building.

REPORT SNAPSHOT

TITLE	North American Multi-Tenant Datacenter Supply: Top 10 Markets – 2013
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ABOUT THIS REPORT

The North American Multi-Tenant Datacenter Supply: Top Markets 2013 report gives readers an overview of the top 10 datacenter markets in North America, including metrics for geographies and specific providers. In this report, 'multi-tenant datacenters' are considered multi-customer colocation and wholesale facilities. Single-user enterprise datacenters and single-tenant wholesale datacenters are specifically excluded from this analysis.

The report provides current supply, demand and utilization metrics, as well as market-specific analysis similar to our previous supply report series. We size each market by existing supply levels, include maps of datacenter locations and identify all providers as well as identify the top three datacenter providers in each market.

COMPANIES INCLUDED IN THIS REPORT

1025Connect

2020 Live Oak MFC

360TCS

365 Main

AiNet

Alchemy Communications

Alpheus

AlteredScale

American Internet Services

Another 9

Aperisys

Arbinet

Ascent

AT&T

Atjeu Hosting

Atlantic Metro Communications

Bay Area Internet Solutions

Benaroya Company

Bothell Data Services

BroadRiver

ByteGrid

Capital Internet

Carpathia Hosting

Cervalis

China Telecom

China Unicom

ClearDATA

Clearview International

CME Colocation Services (CME Group)

CNS Colo

Cogent Communications

Colo Atl

ColocateUSA

ColocationDallas

ColoCenters

Cologix

ColoGuard

ColoGuys

ColoServe/GoGrid

ColoSpace

Continuum Data Centers

COPT

CoreSite

CoreSpace

CoreXchange

Corporate Colocation

Cousins Properties

Cyber Wurx

CyberTrails

Cyberverse

CyrusOne

Dallas Data Center/High Touch Technologies

DataBank

Datagram

DataGryd

Datapipe

DCI Technology Holdings / ASB Capital Management (INFOMART)

Digital Capital Partners

Digital Fortress

Digital Hub USA

Digital Realty Trust

DLS Internet Services

Downtown Colo

DuPont Fabros Technology

EarthLink

Enterhost

Equinix

EvoSwitch

Excalibur Technology

Expedient Communications

Experis Data Centers

Facebook

Facility Gateway Corpo-

COMPANIES INCLUDED IN THIS REPORT

ration

Fast Serv Networks

FDCServers

FiberCloud

FiberMedia Group

First Potomac Realty Trust

Fisher Plaza

FOGO Data Centers

Fortune Data Centers

Future Hosting

GigeNET

Global IP Networks

Global Net Access (GNAX)

Google

Gotham Bus

Granite Block Global Data Center

H5 Colo

Highwinds Network Group

HOSTING

Hostway Corporation

Hqhost.net

HugeServer

Hurricane Electric Internet Services

Integra Telecom

Internap Network Services

InterServer

IO

ISOMEDIA

ISWest/Key Information Systems

IX2 Networks

Lam Cloud

Latisys

Layer42 Networks

Level 3 Communications

Lightower Fiber Networks

Limestone Networks

Markley Group

MFXchange Holdings

mindSHIFT Technologies/ Best Buy

Multacom

Natcoweb

NationalNet

NaviSite/Time Warner Cable

Net Access Corporation

Net2EZ

NetRiver

NetSource Communications

NTT Communications

OneNeck/TDS

onShore Networks

Open Data Centers

Optic Fusion

OPUS-3

Peak 10

PEER 1 Hosting

Phoenix NAP

QTS Realty Trust

Quadrant Data Systems

RagingWire/NTT

Reliant Access

Sabey Data Centers

Saddleback Communications

Sago Networks

Savvis/CenturyLink

Secured Network Services

Sentinel Data Centers

Server Farm Realty

ServerCentral

ServerPhase

Sidera Networks

Silicon Valley Colocation

Silicon Valley Telecom &

COMPANIES INCLUDED IN THIS REPORT

Internet Exchange

SiteSouth

Skae Power Solutions

SMH Colocation

Solutrix

Sprocket Networks

Steadfast Networks

Stream Data Centers

SunGard Availability Services

Superb Internet/HopOne Internet

T5 Data Centers

Tata Communications

Telehouse America

TelePacific Communications

Telx

New York Internet

Thorn Communications

TierPoint

Tulip Systems

TULIX

tw telecom

U.S. Colocation Services

UnitedLayer

University of Phoenix

US Signal Company

Vantage Data Centers

Vastnet

VAZATA

Verizon Terremark

Vertex SSX

ViaWest

Virtustream

Waymark Communications

Webair

WebNX Internet Services

WebRunners

Westin Building Exchange

Windstream Hosted Solutions

Worknet Inc

Worldlink Internet Services

Xand

Xilogix

XNet Information Systems

XO Communications

YourNet Connection

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TABLE OF CONTENTS

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