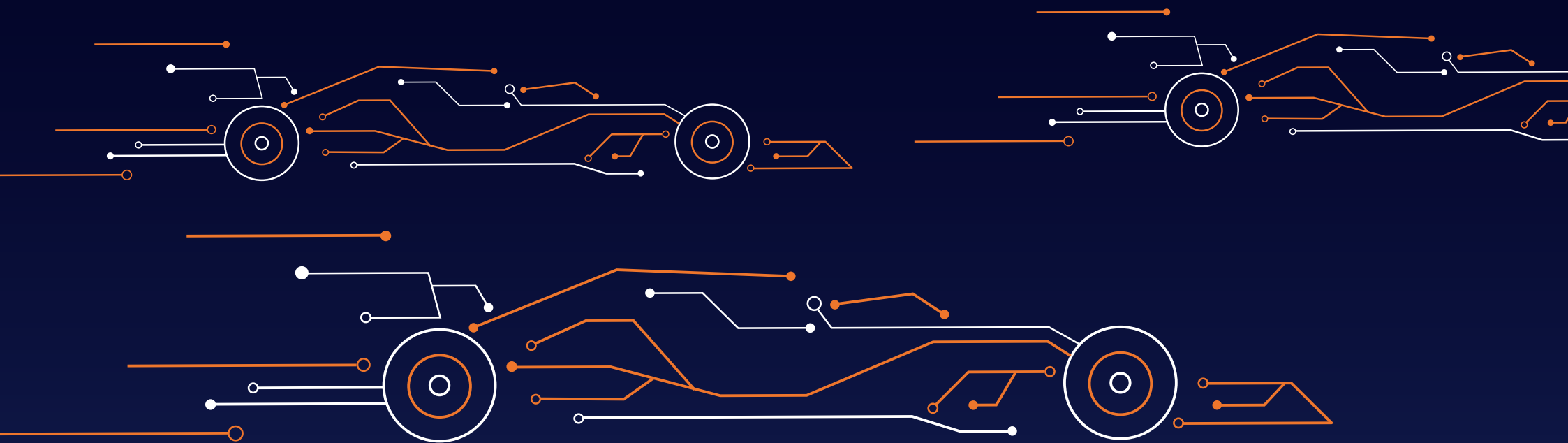


The race to the connected future

November 2021





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Introduction

With established organisations increasingly challenged by more nimble and agile, technology-enabled new entrants to the market, enterprises can no longer afford to lag behind.

They need to transform to meet increasing performance demands of their end users, and do so quickly, or risk losing market share.

As a result, many enterprises are putting their IT infrastructure environments under the microscope as they look to adapt operations to enable future growth. At the same time, new and evolving challenges including security, compliance and sustainability, are driving a major rethink of IT strategies across the board, with different industries demonstrating different levels of IT maturity.

Success in this new environment is dependent on having the right connections; connections to improve the efficiency of service delivery and connections to accelerate speed to market. More and more enterprises are looking to distributed IT infrastructure as the answer and are looking to develop high-speed, low-latent interconnections between cloud, colocation and edge computing.

However, while much has been written about the challenges facing IT teams and current trends


around the three technologies, there is little tangible data to show exactly how each sector is faring in adoption and how their plans compare.

This research looks to set that right, providing a clear barometer for five vertical sectors - financial services, retail, logistics, manufacturing and private healthcare - and benchmarking how evolved the IT infrastructure is within each sector. In short, which sectors are winning or losing in the race to the connected future?

That's a critical question, of course, because for every enterprise, having the right IT infrastructure is key to business continuity, agility and competitiveness. And as enterprises shift from just 'keeping the lights on' during the pandemic to broader long-term transformation, for many it is the data centre that will provide the foundation and connections upon which the business depends.

Ahead of the launch of [Telehouse South](#) - the latest addition to Europe's most connected data centre campus - we commissioned independent research company, Censuswide, to conduct research

among 250 UK IT decision-makers from enterprise organisations (250+ employees) in the finance, retail, logistics, manufacturing and private healthcare sectors.



As enterprises shift from just 'keeping the lights on' during the pandemic to broader long-term transformation, for many it is the data centre that will provide the foundation and connections upon which the business depends

The results identify exactly where each sector is on their IT transformation journey and explore adoption rates of infrastructure strategies and the most popular use cases and drivers for each sector.

This is what we found...

Key findings

Nearly all organisations feel advanced in their IT maturity

- 96% say they are either somewhat or very mature
- Manufacturing has the strongest conviction with 58% saying they are 'very advanced'
- Finance is the laggard with just a third (30%) claiming to be 'very advanced'



Manufacturing has the strongest conviction with 58% saying they are 'very advanced'

Pressure to mature further is being driven by requirements to:

- Increase cyber security (48%)
- Meet customer demand for more connected and personalised experiences (43%)
- Simplify business and operating models to increase efficiency (43%)



43% need to simplify business and operating models to increase efficiency

Enterprises are not confident in their competitiveness

- Just 15% say they are 'ahead of competitors and well-advanced'
- A third (34%) say they need to transform their IT infrastructure or risk becoming less competitive



A third (34%) say they need to transform their IT infrastructure or risk becoming less competitive

Edge computing is now the preferred strategy

- 68% of enterprises have implemented a strategy for edge
- Finance and healthcare lead the way with nearly three-quarters (72%) in each sector having implemented an edge strategy
- But organisations are facing challenges with cost, edge connectivity, locations and security



68% of enterprises have implemented a strategy for edge

Hybrid cloud and private cloud remain dominant cloud approaches

- On average, 43% of enterprise IT infrastructure is in the cloud, rising to 50% in five years' time
- Private cloud is the dominant approach for finance and logistics, while other sectors favour hybrid cloud
- Retail is the only sector to prefer public cloud to private cloud



Private cloud is the dominant approach for finance and logistics

Colocation remains pivotal to success

- 99% of enterprises are using colocation
- On average, two-fifths of enterprise IT infrastructure is outsourced in colocation, rising to 46% in five years' time
- Increased demand will be driven by needs for flexibility (38%), sustainability (36%) and onsite support (36%)



two-fifths of enterprise IT infrastructure is outsourced in colocation

Data growth is causing headaches

- A third (33%) say growing data volumes has become a serious problem
- 45% struggle to handle and integrate disparate data types and sources
- 36% have challenges with siloed, proprietary approaches to data



45% struggle to handle and integrate disparate data types and sources

Sustainability is now a key factor within IT

- The majority (93%) see sustainability as important to their organisation's IT maturity aims
- Manufacturing and retail place the highest importance on sustainability, while finance and logistics feel the least advanced
- Edge computing (46%) and colocation (32%) are considered to be the most sustainable infrastructure models



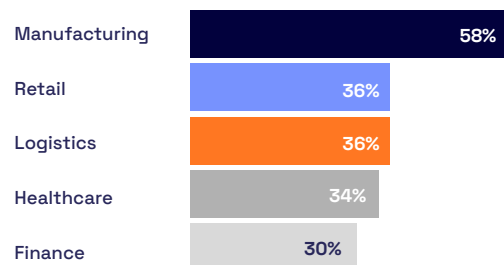
93% see sustainability as important to their organisation's IT maturity aims

Benchmarking IT maturity

Despite common perceptions that established enterprises are slower to progress with digital transformation, almost all enterprises (96%) feel they are advanced or somewhat advanced in their IT maturity.

Manufacturing has the strongest conviction in its maturity, with a higher proportion of decision-makers (58%) saying they are “very advanced” compared to other sectors, likely driven by the push to Industry 4.0 model techniques and ways of working.

Organisations that consider their IT maturity very advanced



Despite high confidence in IT maturity, only 15% say they are ahead of competitors

However, perception of IT maturity could indicate a level of misplaced confidence. Technical services organisation, **HDI** says “IT maturity comprises a set of capabilities — the IT organisation’s ability to deliver outcomes.” By this definition, the fact that a significant proportion of organisations have not yet implemented a strategy for cloud or edge computing for example, casts doubt on their level of maturity.

Furthermore, despite high confidence in IT maturity, only 15% say they are ahead of competitors and well-advanced while a third (34%) recognise they need to transform IT infrastructures or risk becoming less competitive, suggesting improvements still need to be made.






Healthcare has the greatest confidence in its competitiveness, with a quarter (24%) of the sample believing they are ahead of competitors and well advanced, while finance is under the greatest pressure to transform IT to stay competitive, acknowledged by two-fifths (42%) of respondents.



Feeling the pressure

All sectors are feeling the pressure to deliver a more mature IT infrastructure with cyber security (48%), customer experience demands (43%), and increasing efficiency (43%) the top drivers. However, priorities vary per sector. Cyber security is the top pressure for retail, developing new applications and services for manufacturing, while healthcare, logistics and finance are under more pressure to increase efficiency.



Where do the pressures to deliver a more mature IT infrastructure originate from?				
 FINANCE	 HEALTHCARE	 LOGISTICS	 MANUFACTURING	 RETAIL
46% Drive to increase efficiency	50% Drive to increase efficiency	46% Drive to increase efficiency	48% New applications & services to attract new customers	62% Need for increased cyber security
46% Demand for connected & personalised experiences	48% Need for increased cyber security	44% Need for increased cyber security	44% Demand for connected & personalised experiences	44% Demand for connected & personalised experiences
44% Need for increased cyber security	48% Demand for connected & personalised experiences	40% Demand for connected & personalised experiences	42% Need for increased cyber security	40% Budget pressures

Understanding infrastructure strategy

Having a robust IT infrastructure strategy is critical in helping companies improve efficiency, productivity and maintain competitive advantage and this has only been reinforced by the Covid-19 pandemic.

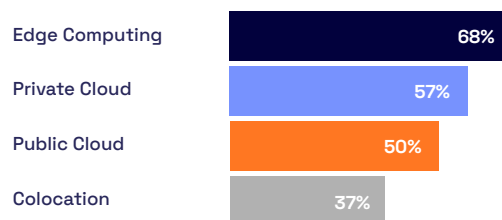
Research conducted by Telehouse in 2020 - Vision 2030: challenges, opportunities and trends – found 91% were planning to make changes to their IT infrastructure following the pandemic, including increasing bandwidth/connectivity options, shifting more workloads to the cloud, increasing capacity in the data centre and transitioning from on-premise to colocation.

Looking at the results of this research, many enterprises appear to have adopted a hybrid IT strategy, consisting of a mix of cloud, edge computing and colocation. The latter of which is often a key enabler, offering autonomy, high levels of security and 24x7 support, together with the flexibility to scale capability easily.

Typically, established enterprises are more likely to rely on on-premise infrastructure rather than cloud, with hybrid deployments common, so it's encouraging to see such high adoption of different technology.

Edge computing has the highest levels of strategy implementation, likely driven by the pandemic

Which of the following, if any, has your organisation implemented a strategy for?



which acted as a catalyst for many to speed up digital transformation and distribution of IT infrastructure. Finance and healthcare are leading the charge, with nearly three-quarters (72%) in these sectors having deployed an edge computing strategy. Manufacturing is the laggard, with only 58% of respondents implementing an edge strategy, however, the fact that this is still over half of respondents is encouraging.

Cloud and colocation have lower reported levels of strategy implementation. However, this could be due

to the fact that both have been around longer than edge and enterprises do not have, or feel they need, strategies underpinning their usage. For example, while only 37% claim to have implemented a strategy for colocation, 99% are outsourcing at least some of their IT infrastructure in colocation ([see page 11](#)).

Though many enterprises are often attracted to the functional benefits and physical reach of data centres, their main benefit is the on-demand access to network, cloud/SaaS and edge services ecosystems that they provide.

It's also important to note that often edge strategies are underpinned by colocation and cloud services, both of which are key building blocks. This might further help to explain the reasons why respondents sometimes fail to recognise colocation as a strategy in its own right.

This interconnection between different technologies in the data centre is growing in importance too.

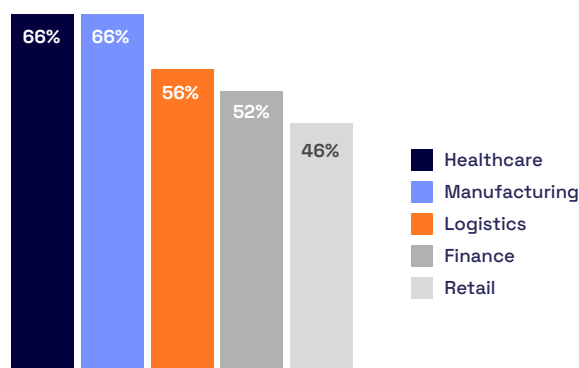
Gartner predicts that by 2025, 85% of infrastructure strategies will integrate on-premises, colocation, cloud and edge delivery options, compared with a fifth in 2020. Ultimately, the key to success for organisations is building the right infrastructure foundations and connections to enable the edge and cloud, and the right data centre partner is critical in achieving this.

More enterprises had implemented a strategy for private cloud than public cloud in all sectors bar retail, which favours public cloud. This could be due to the fact the sector has a high volume of consumer-facing technologies and services which may benefit from connection between public cloud systems. Another potential driver is scalability.

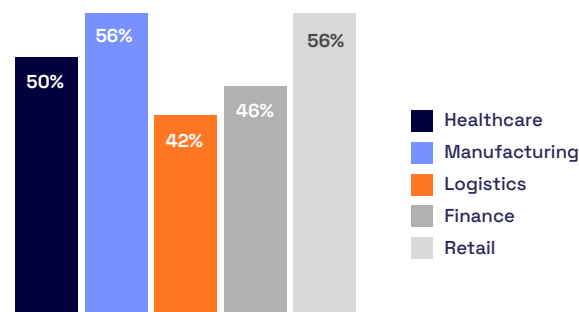
The use of the public cloud can enable retailers to quickly and easily ramp up capability during busy shopping seasons or when there are major promotions. Again, healthcare is leading in private cloud, alongside manufacturing, while logistics is the laggard in terms of public cloud, with only two-fifths implementing a strategy.

In terms of colocation, strategy implementation rates are similar across sectors, apart from manufacturing which is leading the way with 46% of organisations having already adopted a strategy.

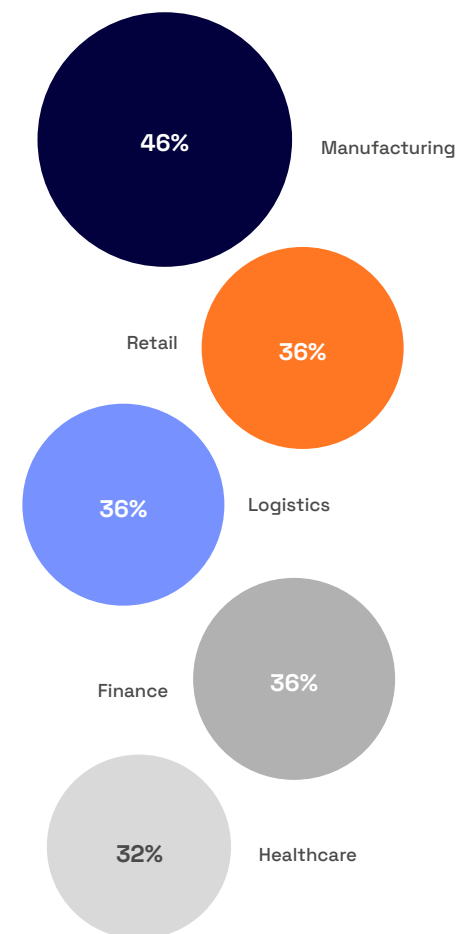
Implementation of private cloud strategy per sector



Implementation of public cloud strategy per sector



Implementation of colocation strategy per sector



Colocation demand and usage

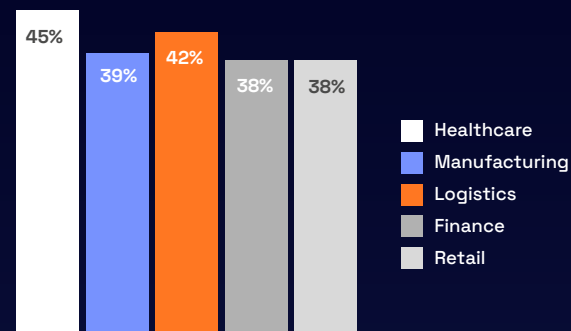
The majority of enterprises (99%) are using colocation to outsource some of their infrastructure. On average, two-fifths of enterprise IT infrastructure is outsourced in colocation.

Healthcare is currently outsourcing the most (45%) despite being the laggard in terms of strategy implementation, again reinforcing the fact that perhaps many mistakenly do not view colocation as strategic.

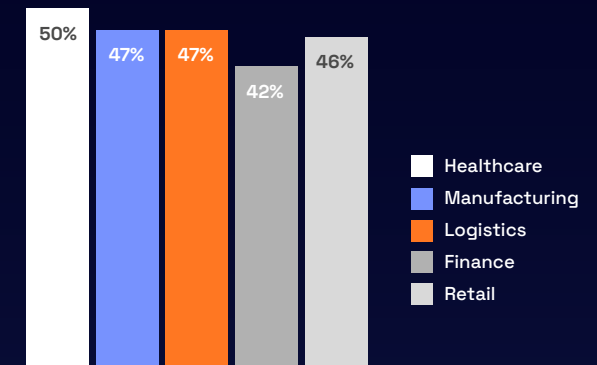
Demand for colocation looks set to rise at similar levels across all sectors. In five years' time, the mean average percentage of IT infrastructure outsourced in colocation is anticipated to increase to 46%, with healthcare still leading the way (50%) and finance trailing on 42%.

This represents a positive increase, which is being driven in part by rising data volumes and the impact of the pandemic on IT infrastructure. There are also encouraging signs that the pace of adoption appears to be picking up.

Current percentage of IT infrastructure outsourced in colocation today (2021)



Percentage of IT infrastructure outsourced in colocation in 5 years' time (2026)



Research commissioned by Telehouse in 2020 for its [“A Vision for IT Infrastructure in 2030” report](#), albeit with a different survey sample, indicated a projected rise in usage of just 2% for colocation between 2020 and 2030. However, the current research suggests a 6% increase on average in half the timeframe (five years) suggesting a growing need for colocation. This could have been spurred on by the pandemic as organisations increasingly realise the access, security and resilience benefits of not hosting infrastructure on-premise.

Over the longer term, we anticipate that adoption of colocation will increase further as the potential for applications around big data; 5G-fuelled networks and IoT rises.



Key drivers

Currently the leading driver of investment in colocation is flexibility (38%) with enterprises requiring the ability to scale services to support hybrid IT environment as required. As data volumes grow, enterprises increasingly want to expand and grow within existing sites, as evidenced with the imminent launch of Telehouse South in early 2022, driven by customer demand to expand within the existing Docklands campus.

Sustainability is the next biggest driver (36%) due to increasing pressure to reduce carbon footprint, followed by the availability of on-site technical support (36%). The results of previous Telehouse research indicated that sustainability was not a top factor when choosing a data centre supplier, however, this suggests that organisations are increasingly

recognising the positive steps taken by the data centre industry to become carbon neutral and improve sustainability and are leaning on outsourcing more to improve their own credentials.

Looking specifically at different drivers per sector, flexibility is a top driver in all sectors apart from finance, which is less likely to buy incrementally as they grow due to security requirements.

Top drivers for the finance sector are sustainability, faster data access and improved connectivity, likely driven by the need to improve customer experience on technology such as apps and websites, as well as connect disparate hybrid IT structures. Choosing a provider with low latency, high bandwidth and seamless access to an ecosystem of connectivity partners and cloud providers will be critical for these organisations.

Colocation use cases

Across all sectors, the two biggest use cases for colocation are the adoption of new back-office business applications (38%) and 5G networks/connected technologies (36%). Other strong use cases highlighted by survey respondents include to access analytics/business intelligence (32%); implementation of AI/machine learning (31%) and security technology (also 31%).

Conversely, the two biggest reasons organisations across all sectors are not outsourcing more or any of their IT infrastructure to a colocation provider are data integrity (39%) and concerns around security and compliance (38%). As customers increasingly move their services online, data is exposed to more risks and enterprises will need a colocation provider that can offer the highest levels of on-site security.

Top drivers of investment in colocation per industry

 FINANCE	 HEALTHCARE	 LOGISTICS	 MANUFACTURING	 RETAIL
50% Sustainability	42% Flexibility	40% Flexibility	48% On-site support	42% Flexibility
42% Faster access to data and services	42% Faster access to data and services	38% Security	36% Flexibility	42% Sustainability
38% Improved connectivity	40% Regulatory compliance	34% Regulatory compliance	32% Regulatory compliance	36% On-site support

Cloud demand and usage

Demand for cloud remains consistent across all sectors.

On average, enterprises have put less than half (43%) of their IT infrastructure in the cloud, with healthcare leading the way (45%) and finance the laggard (39%).

Hybrid and private cloud deployments are most dominant, followed by multi-cloud and finally public cloud.

Low adoption of public cloud is indicative of ongoing concerns around security and data sovereignty

Finance and logistics favour private cloud, while healthcare, manufacturing and retail prefer hybrid cloud. Low adoption of public cloud is indicative of ongoing concerns around security and data sovereignty, particularly prominent in heavily regulated financial sectors such as financial services.

In fact, over half (54%) say security constrains their use of cloud – and its customer data they are most

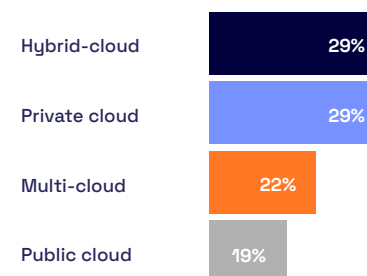
concerned about, with 41% saying they keep this out of the cloud.

Healthcare keeps significantly more customer data out of the cloud while logistics is least likely to exclude it. The inability to monitor data in motion between, to and from cloud applications constrains decisions more in finance and healthcare compared to other sectors.

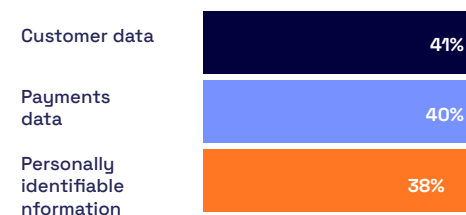
Cloud adoption is projected to increase over the next five years, with respondents saying that a half of their IT infrastructure needs to be in the cloud by 2026 on average.

Retail has the biggest desire to increase cloud adoption, followed closely by logistics and healthcare, which are likely to be motivated by a desire to improve customer experience. Finance lags behind significantly in cloud adoption, suggesting the sector still has more work to do to catch up with other industries.

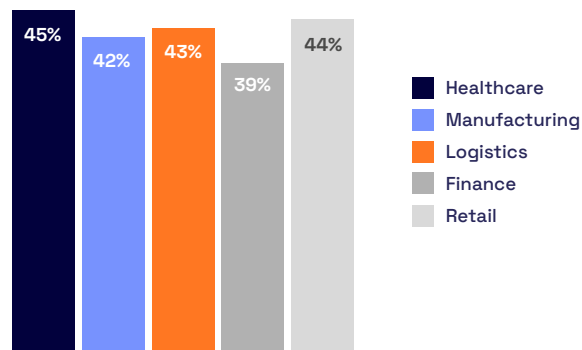
Dominant cloud approach across enterprises



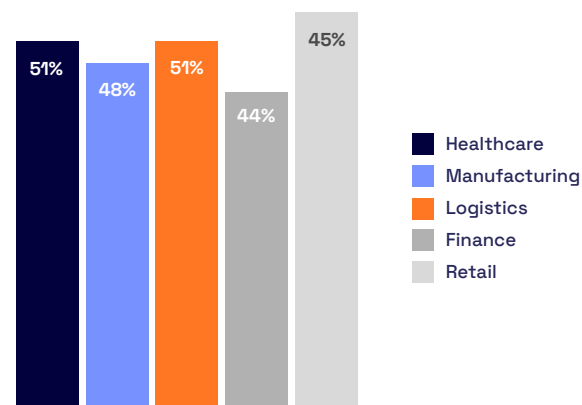
Data kept out of the cloud



Current percentage of IT infrastructure in the cloud today



Percentage of IT infrastructure in the cloud there needs to be in 5 years' time?



Key drivers






Perhaps surprisingly, the leading driver of investment in the cloud is security (34%), followed by the increase in e-commerce (32%) and need to keep up with competitors (31%).

Drivers differ slightly per sector, with security being a top driver in all sectors apart from retail who are more driven by the need for increased agility and to deliver a better experience in response to the move to online accelerated by the pandemic. Increased data volumes and cost reduction are also key drivers for healthcare, manufacturing and finance.

○ Increased data volumes and cost reduction are also key drivers for healthcare, manufacturing and finance



Top drivers per industry

 FINANCE	 HEALTHCARE	 LOGISTICS	 MANUFACTURING	 RETAIL
34% Competitive advantage	42% Competitive advantage	42% Security	38% Security	34% Increase in e-commerce
34% Increased data volumes	38% Reducing costs	36% Increase in e-commerce	34% Reducing costs	34% Greater agility
32% Customer experience & security	38% Security	36% Greater agility	30% Increased data volumes	30% Customer experience

Cloud use cases

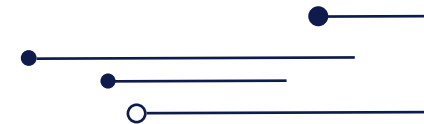
On average, the two biggest use cases cloud is enabling are analytics and business intelligence (36%) and 5G networks/connected technologies (35%), the latter of which is also a top use case for colocation, again supporting the demand for hybrid cloud and edge.

Top challenges around advancing towards IT maturity in the cloud include ensuring resilience (45%), upgrading legacy IT (44%) and security and compliance (43%), all challenges that could be overcome with the support of the right Infrastructure partner.

However, while resilience and security will remain top challenges in five years' time, enterprises expect managing connectivity to become the biggest challenge, suggesting an increasing desire for multi-cloud strategies and connections to multiple cloud and service providers.



Enterprises expect managing connectivity to become the biggest challenge



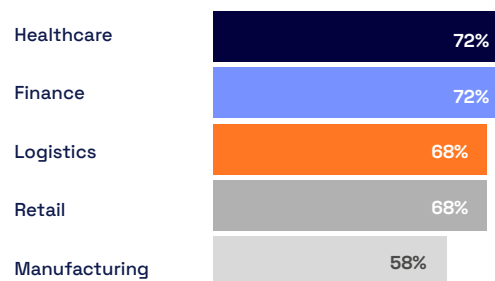
Edge computing demand and usage

Edge strategies are already being deployed by the majority of enterprises (68%) with just over a quarter saying it will be very important to their organisation with the next 5 years.

This is no surprise given the rise of 5G, AI and IoT which have made it more important than ever for businesses to store, access and analyse exponential levels of data at record speeds.

Currently, the biggest adopters are healthcare where applications like telehealth have taken off in recent years, followed by finance and logistics.

Deployment of edge computing strategy per sector



Key drivers and use cases

The top drivers of investment in edge computing for enterprises are adoption of new technologies/devices (34%), competitor capability (30%) and digital transformation (30%).





However, drivers differ slightly per sector, with finance and retail driven more by a need to optimise data volumes, whereas healthcare is more focused on competitive advantage, manufacturing and logistics on adoption of new technology/devices

The top use cases differ per sector, however, 5G networks/connected technologies, remote working and security are common.

Despite high adoption rates of edge computing, enterprises are still facing challenges when using edge to advance IT maturity, including the cost of investment in edge connectivity (30%), uncertainty over locations to collect data (28%) and a lack of understanding of edge networks (27%).



Top use cases per industry

 FINANCE	 HEALTHCARE	 LOGISTICS	 MANUFACTURING	 RETAIL
28% New back-office applications	30% Remote working	30% Real-time analytics/ intelligence	26% Real-time analytics/ intelligence	28% Remote working
28% Security technology	30% Security technology	26% 5G networks/ connected technologies	20% Security technology	28% IoT
26% 5G networks/ connected technologies	26% 5G networks/ connected technologies	22% New back-office applications	20% 5G networks/ connected technologies	22% New back-office applications



Security & data

IT security remains one of the biggest challenges facing organisations today with almost all enterprises saying their IT decisions are constrained by security concerns.

Use of edge computing is constrained the most (61%), despite high levels of implementation, followed by cloud (53%) and colocation (52%).

Increases in data volumes over the last 12 months have posed difficulties for enterprises across all sectors

Interestingly, despite being the biggest adopter, healthcare sees security as a bigger constraint on edge computing, with three-quarters citing it.

The security issues that most constrain decisions around IT infrastructure are the inability to monitor data in motion between, to and from cloud applications (55%), lack of consistent controls over multi-cloud and on-premises infrastructure (43%), and supply chain partner vulnerabilities (39%).

However, challenges differ by sector, with retail

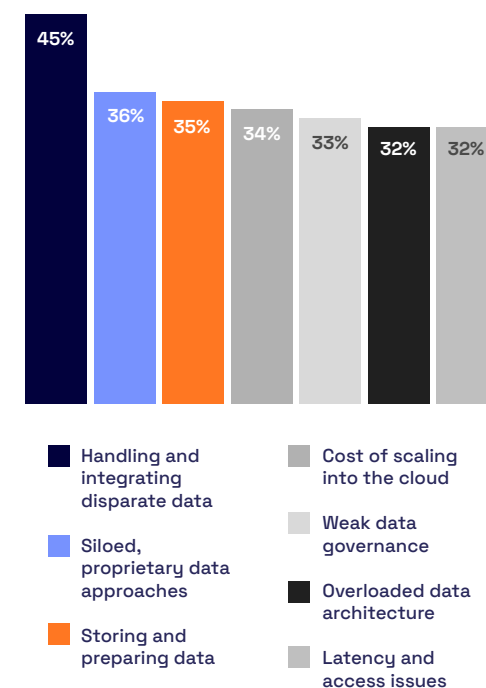
manufacturing and logistics more challenged by a lack of in-house cyber skills.

Big data also presents both challenges and opportunities for enterprises. Businesses are looking to unlock and analyse data to increase agility, inform strategy, launch new services quickly and inform decision making for digital transformation, but data proliferation is causing headaches.

Increases in data volumes over the last 12 months have posed difficulties for enterprises across all sectors, with a third saying it is a serious problem. This is particularly prominent for healthcare, with 46% saying it is a serious challenge.

Challenges with data volumes are widespread but the biggest are handling and integrating disparate data types from different sources; siloed, proprietary approaches to data and storing and preparing data for analytics, artificial intelligence and machine learning.

Biggest challenges with data volumes



Handling and integrating disparate data types from different sources is more of a challenge for healthcare (54%) and manufacturing (52%), while siloed, proprietary approaches to data are more of a challenge in logistics (42%) and finance (40%).

Challenges could be exacerbated if enterprises are continuing to host their infrastructure on-premise, and for many it simply will not be practical to store data completely in house for much longer. As data demands increase further, enterprises need to consider colocation services.

Challenges could be exacerbated if enterprises are continuing to host their infrastructure on-premise

Having a data centre that is secure, power dense and highly connected will become increasingly pivotal to enable enterprises to quickly ingest and process data and gain an edge over the competition.

The ongoing growth of data volumes is likely to be key also in driving the adoption of edge, which is widely seen as an efficient way of moving and processing large volumes of data in real time. The rapid rise of edge, increasingly a disruptor to the 'status quo', is likely to be a key factor behind the high proportion of survey respondents stating they have adopted a strategy.



Having a data centre that is secure, power dense and highly connected will become increasingly pivotal to enable enterprises to quickly ingest and process data and gain an edge over the competition



Sustainability

Sustainability remains a critical factor in enterprise IT maturity with 93% saying it is important or very important.

Sustainability is seen as most important in manufacturing (38% see it as 'very important') and retail (36%) compared to other sectors.

Pressure to increase IT sustainability is being driven by customers and partners (57%), followed by boards of directors (47%) and regulation (44%).

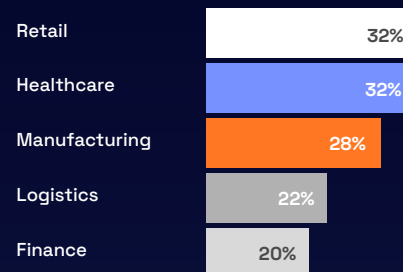
Encouragingly, most organisations (65%) think they are 'somewhat advanced' in adopting sustainable IT operations, suggesting progress has been made but there is room for improvement. Just over a quarter (27%) regard themselves as 'very advanced.'

Progress in sustainability differs by sector, with manufacturing and retail placing the highest importance on sustainability, while finance and logistics feel the least advanced.

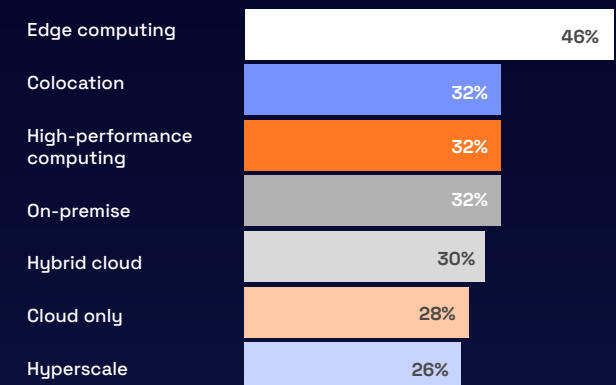
Enterprises believe edge computing is the most sustainable infrastructure model, followed by colocation and high-performance computing.

Cloud only and hyperscale models were seen as the least sustainable. This is not surprising given that centralised infrastructure models can consume a lot of energy and produce a lot of carbon emissions with high volume of data traversing networks.

Enterprises who are 'very advanced' in sustainable IT operations



Most sustainable infrastructure model






Stepping into the connected future

While the race to the connected future is well underway, there is still some distance left to run.

Although the vast majority of organisations see themselves as advanced in IT maturity, the data shows that more work still needs to be done to translate this perception into genuine competitiveness.

There is no one clear sector in the race to the connected future, with different sectors succeeding in some areas over others. However, healthcare repeatedly rises to the fore throughout while finance, a sector plagued with high regulation and compliance requirements appears to be slower to innovate.



Despite being around for many years, edge computing has only recently garnered interest from enterprises

The only exception is in edge computing, with finance leading the edge computing charge, alongside healthcare. Despite being around for many years, edge computing has only recently garnered interest from enterprises; the majority of which are

taking the opportunity seriously by implementing a strategy.


Demand for edge is also likely to be driven by its convergence with other technologies such as cloud and colocation and is evidenced by the fact that most enterprises opt for a mix of technologies. At the same time, data volumes are increasing and becoming a serious problem for enterprises which will only accelerate the drive towards decentralised strategies like edge computing. Sustainability could also be a key factor with most enterprises seeing it as the most sustainable infrastructure model.

Yet, even as the 5G edge demand is distributed around the country, this will still weigh heavily on the base infrastructure. Backbone fibre networks, carrier centric data centres and international transatlantic routes will need to keep pace with the rate of change.

Despite indications that many organisations do not have a colocation strategy in place, the ability to access connected ecosystems will be critical in helping organisations to extend network reach, reduce latency and costs and improve performance

as user and infrastructure demands continue to grow.

Nearly all organisations are outsourcing some infrastructure in colocation already and this will only grow as more organisations look to leverage the benefits of edge and hybrid cloud, as well as newer technology such as AI, machine learning and data analytics. The link between colocation and sustainability is also important, with many seeing sustainability as a key driver for colocation, perhaps viewing it as the answer to meet growing pressure to improve their carbon footprint.



The ability to access connected ecosystems will be critical in helping organisations to extend network reach, reduce latency and costs and improve performance as user and infrastructure demands continue to grow

Certainly, the broader market indicators are good, with industry research indicating strong growth.

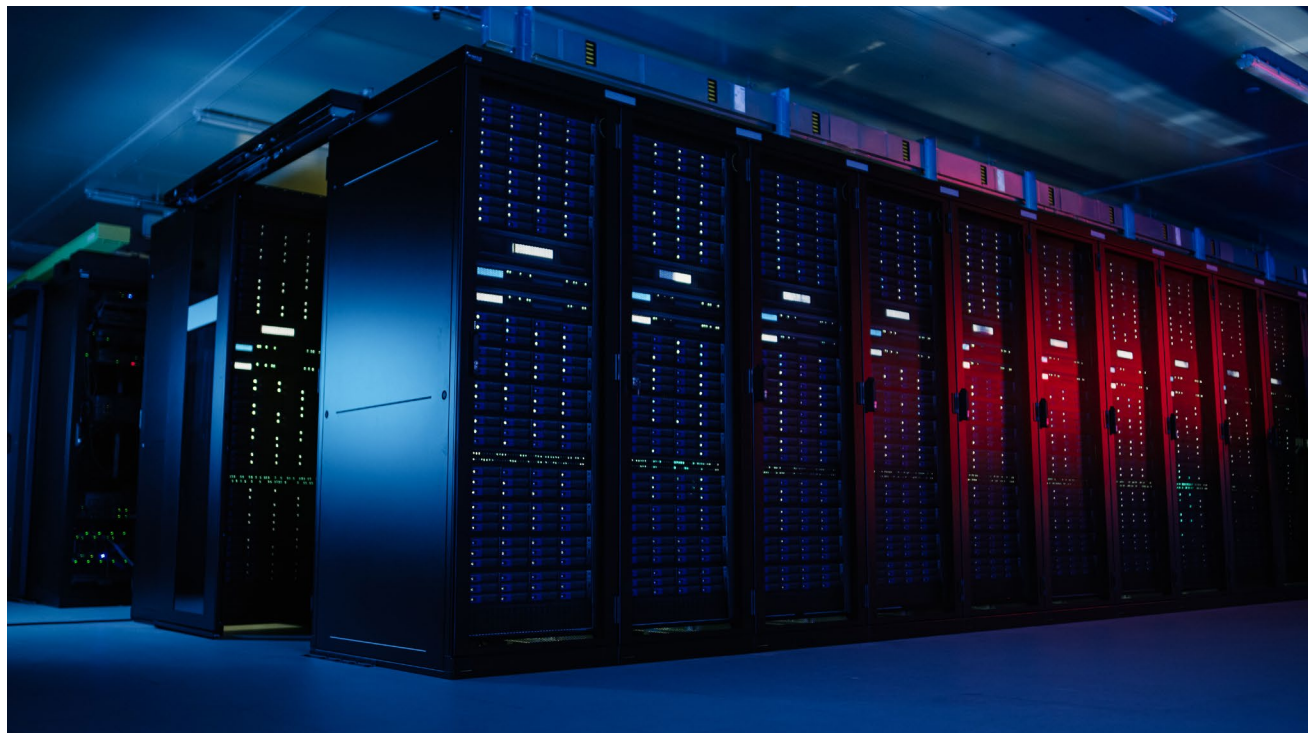
The link between colocation and sustainability is also important, with many seeing sustainability as a key driver for colocation

According to a recent report published by Allied Market Research, the global data centre colocation market generated \$46.08 billion in 2020, and is expected to garner \$202.71 billion by 2030, witnessing a CAGR of 15.7% from 2021 to 2030.

More generally, as customer demand and internet consumption grows, the race to the connected future is only going to accelerate.

Providing connected and reliable experiences, unlocking and analysing data to inform decision-making and leveraging new technology such as artificial intelligence and machine learning to drive innovation will be increasingly important.

And for enterprises, having the right infrastructure partner, one that can provide the security, resilience, and low-latency connectivity required to drive IT maturity forward will be critical to success.



As customer demand and internet consumption grows, the race to the connected future is only going to accelerate



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