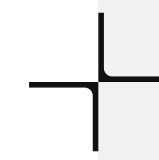




London Data Freeport 'Britain's Digital Future'





LONDON DATA FREEPORT VISION

- Deliver a world class data centre campus that supports the government's digital strategy and ensures the UK remains a leader in the international digital economy and increases London's data centre capacity by 50%, ensuring the UK businesses have access to appropriate digital infrastructure to grow.
- Contribute to the economy and post Covid recovery by investing £12 billion, creating 1300 job years of employment during and post construction equalling £816 million direct GVA contribution to UK GDP during the 5 year Construction phase.
- Deliver an exemplar green infrastructure project that aligns with the government's Clean Growth Strategy and policy ambitions for a carbon neutral future.
- Integrate onsite renewables and invest in an extensive R&D programme to deliver on site renewable power sources that will ultimately contribute to the grid.
- Promote innovation in agriculture, meeting the Committee on Climate Change's Net Zero UK land use policies including tree planting, the introduction of Agro-forestry and restoration of wetlands.
- Use waste heat from the data centre to grow produce that requires humid growing conditions, dramatically reducing the carbon footprint generated by these products creating a sustainable reduced carbon mile food supply for London.
- Deliver a biodiverse landscape with a discovery and learning centre providing an amenity that increases wellbeing and the health of the community.
- Ensure the design is shaped to integrate the buildings into the surrounding landscape using a strategy of wooded bunding and ditches that in turn increases biodiversity on the site.



THE POSITIVE IMPACT

DATA FREEPORT

INVESTMENT, JOBS & SKILLS FOR HAVERING

£2.34bn total cumulative contribution to UKs GDP during construction supporting

40,000 job years of employment locally during construction

£695m total cumulative contribution to Havering's GVA during construction supporting

10,630 job years of employment locally during construction

£738m total GVA contribution to the UK GDP during the first year of operation supporting over

6,100 jobs locally

£42.796m pa of business rates invested into Havering's post Covid recovery



THE GLOBAL OPPORTUNITY

- The world and our population are at a time of unprecedented change. Emerging technologies of the fourth industrial revolution are creating new opportunities. Advances in data proliferation, connectivity, automation and sustainability technology are disrupting existing markets and creating new ones in many infrastructure sub-sectors.
- Between 2010 and 2018, global data storage capacity has increased 25-fold, network traffic has increased 10-fold and computing volumes have increased by 550%.
- Data and digital connectivity will power the economies of our future but require investment in infrastructure (Data Centres) and new governance frameworks (National Data Strategy) to ensure scientific and technological innovation thrive.
- Without significant investment, demand will outstrip supply and global payloads will relocate to other nations and economic growth and positive outcomes for society will not be realised, impacting living standards across the UK.
- We believe it is vital new digital infrastructure is sustainable and future proofed to not only advance the digital economy but also protect the planet.
- Investing in the infrastructure of the data centre at Havering we believe a greener model for data storage that operates on a Carbon Neutral basis with future proofed Carbon Negative infrastructure designed and installed into the grid will be an exemplar for the future of data centre design and operation of global significance to the future of the planet and showcasing the United Kingdom as a world leader in reducing carbon emissions.

INDUSTRIAL REVOLUTION 4.0



MORE CONNECTED DEVICES
=
MORE DATA



MORE DATA
=
MORE ANALYSIS



MORE ANALYSIS
=
MORE COMPUTING POWER



MORE COMPUTING POWER
=
MORE DATA CENTRE DEMAND



MORE DATA CENTRE DEMAND
=
REQUIREMENT FOR MORE DATA INFRASTRUCTURE

THE NATIONAL OPPORTUNITY

Abstract from the UK National Data Strategy (2020)

'Background to the opportunity and data

The UK is already a leading digital nation and our data market is the largest in Europe. Globally, the UK now sits behind only the US and China in terms of venture capital investment.

The UK response to the global coronavirus pandemic has powerfully illustrated the potential benefits of data. Our understanding of this disease, our ability to support people and our cooperation across borders have all relied on the responsible and effective use and sharing of data.

We will ensure that data can be leveraged to deliver new and innovative services, promote stronger competition, and better prices and choice for consumers and small businesses. We will drive an approach to data that holds that all can benefit when data is used responsibly.'

National Data Strategy Policy Paper - 9th December 2020 - DCMS

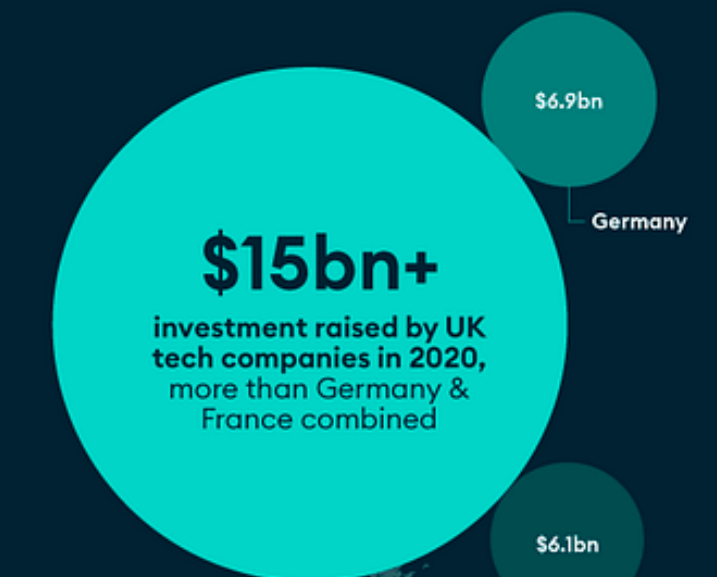
Key outcomes from the UK National Digital Strategy (2017)

1. Building world-class digital infrastructure for the UK
2. Provide the population with access to the digital skills they require
3. Make the UK the best place to start and grow a digital business
4. Support every British business to become a digital business
5. Making the UK the safest place in the world to live and work online
6. Maintain the UK government' position as a world leader in serving its citizens online
7. Unlocking the power of data in the UK economy and improving public confidence in its use



Tech jobs recovery gathers pace as 1 in 10 advertised roles is now in booming digital tech sector

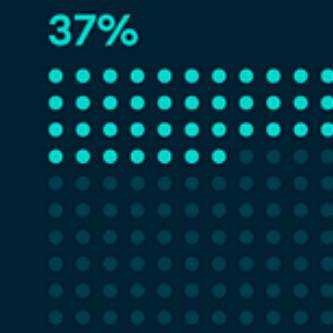
- > 10% of all UK job vacancies are now tech jobs, demonstrating the strength and resilience of the digital economy
- > The digital tech economy employs 2.98m people (an increase of 11% in 2 years)
- > The average tech salary today is £53,518 (compared to UK average salary of £36,903)
- > If growth continues at this rate, the sector would have 100,000 job openings a month before the end of the second quarter of 2021



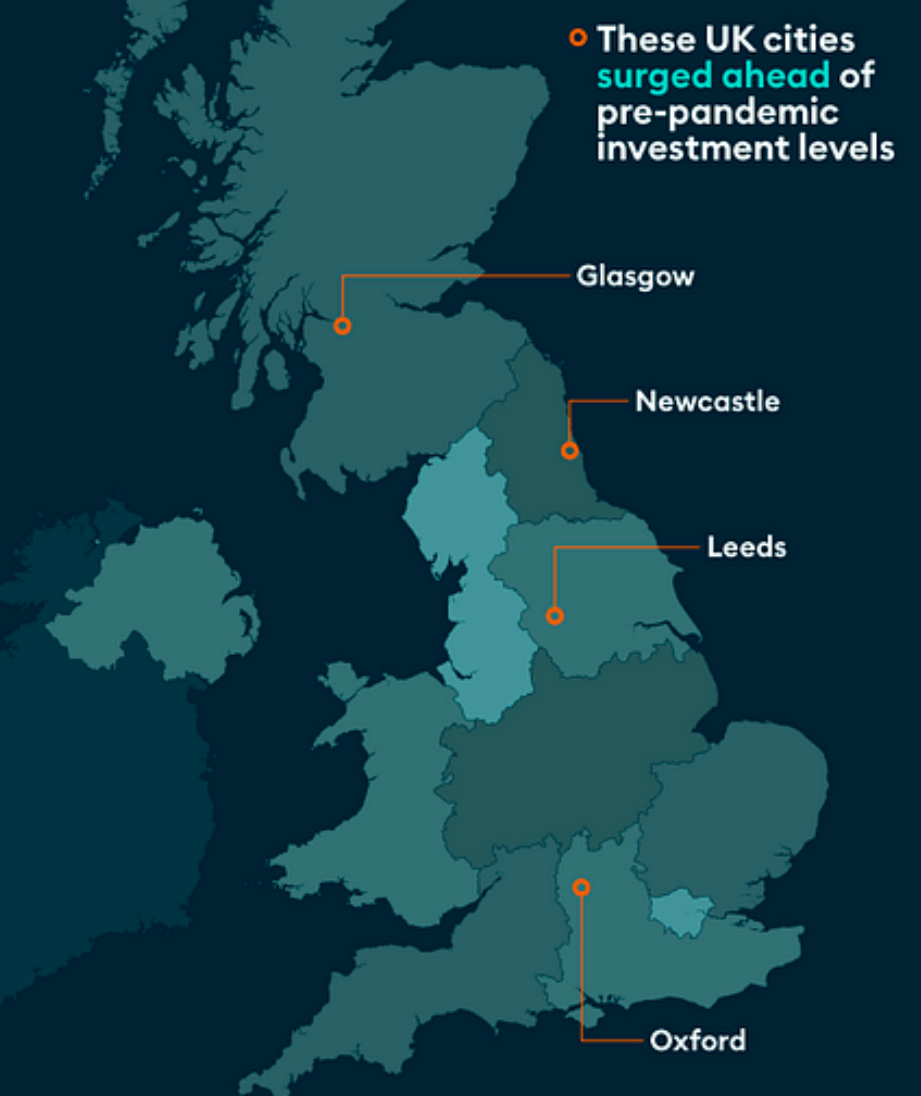
2020 Investment levels in UK tech exceeded record levels achieved in 2019



- 80 unicorns
- > UK tech unicorns now total 80 companies, more than any other country in Europe



- > More than a third of those employed in the digital tech sector are in non-tech roles including legal, marketing, HR and administration



In partnership with:



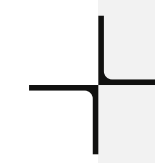
Source - Adzuna, Dealroom ONS, Tech Nation 2020

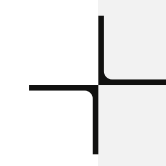
#WeAreTechNation
technation.io

THE UNIQUE OPPORTUNITY

The proposed site benefits from a power resource, via the Warley substation, which has capacity to power the proposed scale of data centre development, and has the ability to expand the power provision to the site. The site is close to a super fast broadband connectivity point and is within close proximity to Canary Wharf, the City and London so benefits from excellent connectivity to the result of the country, and the world. This level of existing digital connectivity is unique. The GLA Smart London Plan has highlighted that London has been the most attractive location for technology companies to make their base, thus the opportunity for Havering and the wider region to capture this economic opportunity is clear, and meeting the unmet need for new data centre development needs to reflect the geographical focus of this need to London and the south east of England.

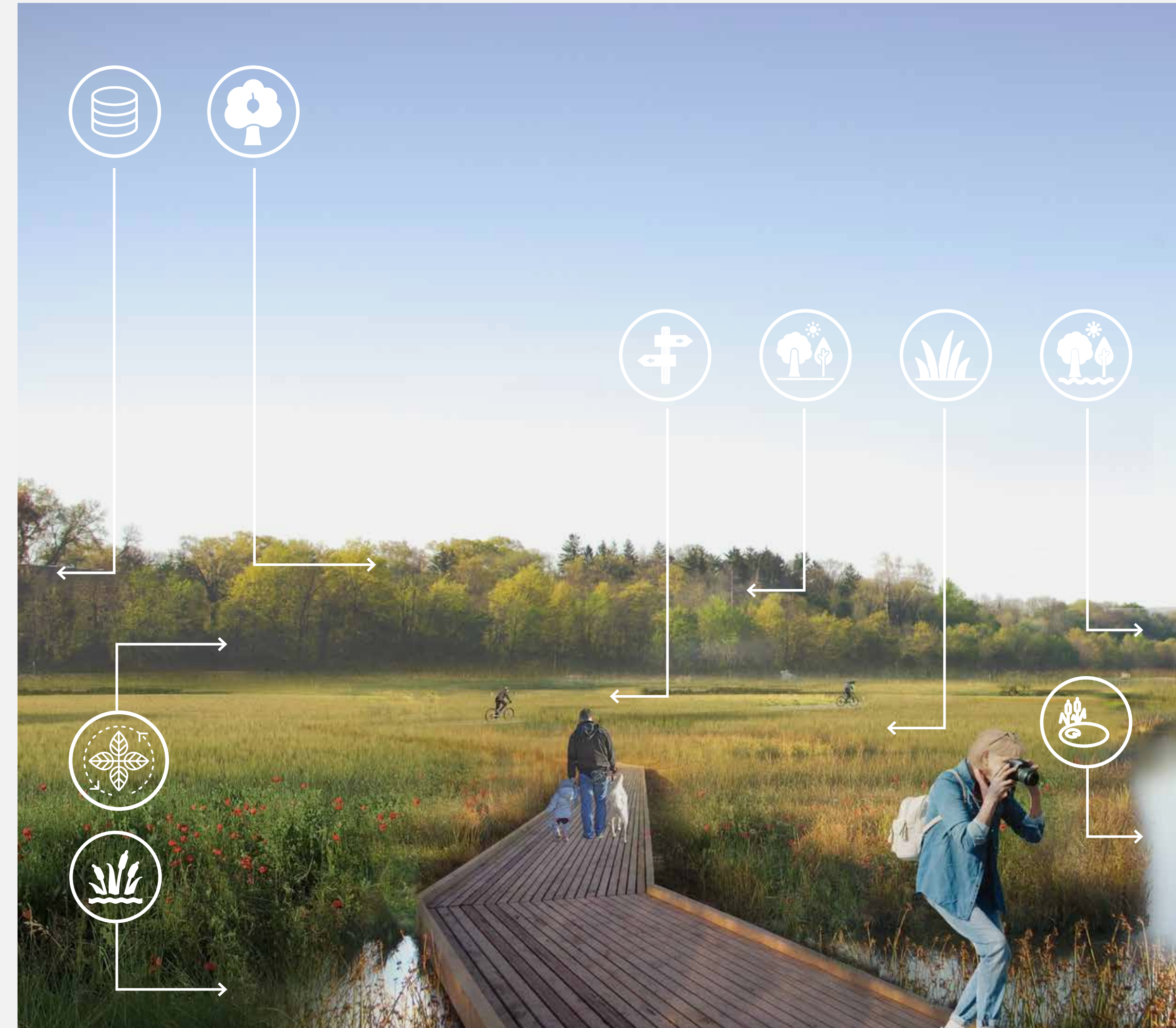
- 650 MW power supply from the Warley Substation.
- Proximity to London and the South East and within the Thames Freeport.
- Scale of the site and the ability to create positive economic, environmental and social impact due to this.





LONDON DATA FREEPORT MASTERPLAN

- 330,000sqm of new data centre floorspace creating the data centre campus.
- 3.2ha (8 acres) of tech led R&D Agricultural facilities exploring the future of agriculture, utilising the waste heat from the data centre campus to create a zero aviation mile supply of food for London.
- Up to 120ha (300 acres) of new green bio diverse nature reserve accessible to the public via pedestrian board walks and cycle routes that provide an incredible amenity promoting physical exercise and wellbeing within the community.
- Discovery & learning centre promoting learning around ecology, bio diversity and sustainable energy in children and the wider community.



THE SITE

DATA FREEPORT

-  Warley Substation
-  Data Centre
-  The Farm & Battery Storage
-  Biodiverse Woodland
-  Biodiverse Wetland
-  Biodiverse Grassland
-  Wet Woodland
-  Wet Grassland
-  Biodiverse Pond
-  Biodiversity Corridor
-  Eco Horticulture & Battery Storage
-  Enhanced biodiverse ditches
-  Cycle & Pedestrian Ecology trails & routes
-  Ecology Discovery & Learning Centre

