Land at Manor Farm, Poyle

Proof of Evidence: Data Centre Needs Assessment - Appendices

Prepared for Manor Farm Propco Limited to accompany a planning appeal
Planning Appeal Ref No: APP/J0350/W/25/3366043

September 2025

savills

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1 Appendix A SIC Codes of Digital Economy Sectors

SIC Description	SIC Code
Manufacture of electronic components	26.11
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Wholesale of computers, computer peripheral equipment and software	46.51
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Radio broadcasting	60.1
Television programming and broadcasting activities	60.2
Wired telecommunications activities	61.1
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Satellite telecommunications activities	61.3
Other telecommunications activities	61.9
Computer programming activities	62.01
Computer consultancy activities	62.02
Computer facilities management activities	62.03
Other information technology and computer service activities	62.09
Data processing, hosting and related activities	63.11
Web portals	63.12
News agency activities	63.91
Other information service activities not elsewhere classified	63.99
Repair of computers and peripheral equipment	95.11
Repair of communication equipment	95.12

2 Appendix B Data Centre Case Studies

Name	Planning Reference	Floor Area (sqm)	MW	MW/sqm
CyrusOne LON2 West Drayton	Hillingdon: 37977/APP/2017/3046	7,484	13.92	0.0019
ARK Union Park Hayes	Hillingdon: 75111/APP/2020/1955	56,000	99	0.0018
Court Lane Industrial Estate, Iver, Buckinghamshire	Buckinghamshire: PL/22/4145/OA	65,000	100	0.0015
Iver Heath Data Park	Buckinghamshire: PL/24/2130/FA	69,110	90	0.0013
200 Bath Road	Slough: P/20367/001	30,130	40	0.0013
210 Bath Road	Slough: P/20367/001	49,700	50	0.0010
Bay 9-13 Banbury Avenue	Slough: P/20054/001	15,089	19.2	0.0013
Woodlands Park, Iver	Buckinghamshire: PL/24/0754/OA	72,000	90	0.0013
Average				**0.0014**

3 Appendix C Sensitivity Testing

3.1 IDC Data Creation Trend

3.1.1 Within the 'IDC Data Creation Trend' I have applied the annual growth rate in **Table C.1** below to the data centre inventory within the Study Area from 2024. The IDC are not a real estate focussed, or a town planning company, so accordingly they do not provide a demand forecast for data centre capacity within the Study Area. Throughout this Proof of Evidence I have demonstrated the link between data created, stored and processed and data centre requirements. As such, it is valid to assume that the growth in the global datasphere is comparable to the demand for data centres. As such, in this sensitivity test I apply the growth rate of data to the Study Area's inventory to estimate annual future demand. The results of this are also shown in **Table C.1**.

Table C.1 IDC Global Datasphere Annual Growth Projections

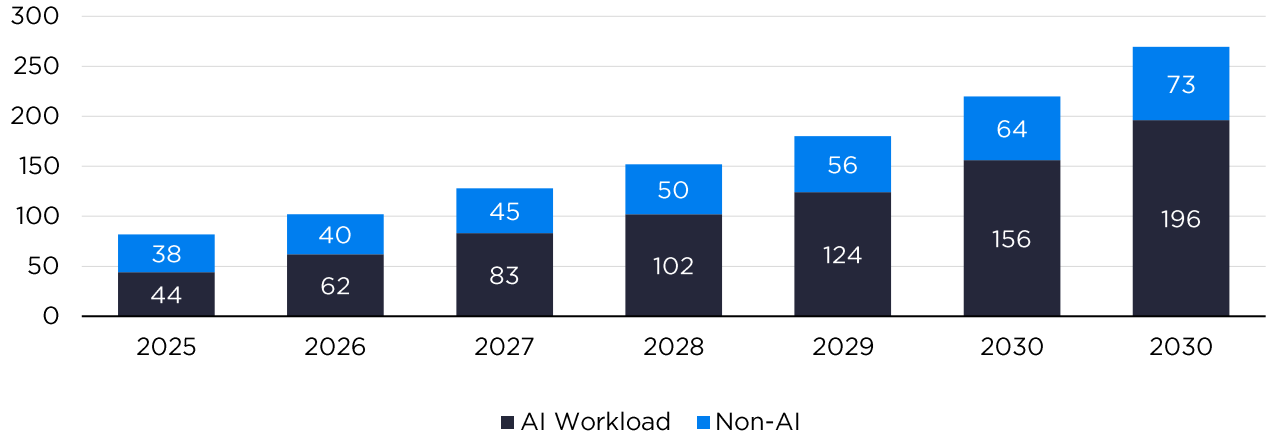
	2025	2026	2027	2028	2029	2030	Total (2025-2030)
Annual Growth Rate	24.4%	24.4%	24.4%	24.4%	18.5%	13.5%	-
Annual Demand (MW)	378	470	585	728	687	594	3,443

Source: International Data Corporation Global DataSphere Forecast

3.2 McKinsey Demand Scenarios

3.2.1 The global consulting firm McKinsey have created a 'McKinsey Data Centre Demand Model'[1] in order to forecast future global demand for data centres. Within their modelling, they use Gartner and IDC reports and data. As McKinsey's demand estimates are global, I have used their assumptions and modelling and have applied them to the Study Area in order to estimate future demand.

Figure C.1 McKinsey Estimated Global Data Centre Capacity Demand (GW)



Source: McKinsey Data Centre Demand Model

[1] Available at: https://www.mckinsey.com/industries/technology-media-and-telecommunications/our-insights/the-cost-of-compute-a-7-trillion-dollar-race-to-scale-data-centers

Continued Demand Scenario

3.2.2 I have applied McKinsey's assumption that in 2025 54% of data centre inventory is for AI related demand. When I apply this to the Study Area's existing data centre capacity (1,550 MW) it results in 832 MW being 'AI-related' and 718 MW Being 'Non-AI related'. If I then apply their growth rates to these specific categories I get the results as shown in **Table C.2**.

Table C.2 Study Area estimations of per annum demand using McKinsey's Continued Demand Scenario

Year	Non-AI (MW)	AI Workload (MW)	Total Data Centre Demand (MW)
2025	38	340	378
2026	95	397	491
2027	95	359	454
2028	113	416	529
2029	151	605	756
2030	173	761	934
Total			3,542

Source: Savills analysis of DCByte data and McKinsey modelling

Accelerated Demand Scenario

3.2.3 This scenario uses the same assumptions regarding the split between AI and Non-AI related demand from the 'Continued Demand' Scenario. The difference in this scenario is that the 'AI-Workload' experiences a higher growth rate, 39.9% CAGR compared to 28.3% in the 'Continued Demand Scenario'. Using this growth rate results in the figures in Table C.3.

Table C.3 Study Area estimations of per annum demand using McKinsey's Accelerated Demand Scenario

Year	Non-AI (MW)	AI Workload (MW)	Total Data Centre Demand (MW)
2025	38	332	370
2026	95	476	571
2027	95	555	650
2028	113	503	616
2029	151	582	733
2030	173	846	1,019
Total			3,959

Source: Savills analysis of DCByte data and McKinsey modelling