

# Land at Manor Farm, Poyle

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## Summary Proof: Data Centre Needs Assessment

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

September 2025



### 1.1 Introduction

- 1.1.1 My name is Mark Powney; I am a Director in the Savills Economics team with over 25 years of experience across viability modelling and commercial market assessments.
- 1.1.2 This summary proof highlights the main points from my Proof of Evidence in relation to Manor Farm and land north of Wraysbury Reservoir (the "Appeal Site") to accompany a Planning Appeal Ref No: APP/J0350/W/25/3366043 (local planning ref. P/10076/013) (the "Appeal") for the redevelopment of the site for an employment scheme comprising a Data Centre (DC) and a Battery Energy Storage System (BESS) with associated works (the "Development").
- 1.1.3 This summary, consistent with my main Proof of Evidence, demonstrates that data centres are now recognised as Critical National Infrastructure and that there is an overwhelming and urgent requirement for additional capacity in the Slough Availability Zone (SAZ).

### 1.2 Data Centre Sector Overview

- 1.2.1 The data centre sector is undergoing rapid expansion, led by structural drivers such as artificial intelligence (AI), cloud computing, and the exponential rise in global data creation. Accordingly, there has been an increase in demand for hyperscale data centres, which are designed for robustness and scalability. For low latency operations such as cloud computing, data centres are required to be located within geographical areas called availability zones. These availability zones allow for load balancing and the reduction of disruptions.
- 1.2.2 The UK is strategically placed within this global data centre market. London is Europe's largest concentration of digital demand and forms part of the FLAP-D markets (Frankfurt, London, Amsterdam, Paris, Dublin). Slough has emerged as the pre-eminent availability zone serving London, benefiting from proximity to the capital, robust fibre networks, and access to high-voltage grid capacity.
- 1.2.3 Government policy is now explicitly supportive of data centre development. In September 2024 the Secretary of State designated data centres as Critical National Infrastructure, while the December 2024 update of the NPPF requires local plans to identify appropriate sites. In January 2025, the Government's AI Opportunities Action Plan referred to data centres as the "engines of the AI age" and set out proposals for AI Growth Zones with fast-tracked planning and grid access.

### 1.3 Data Centres and the Wider Economy

- 1.3.1 The UK has experienced a severe slowdown in economic growth since the 2008 financial crisis. As a result, productivity per worker has been broadly flat since 2008. This has prevented wage growth across the economy, and living standards have also failed to increase further. The UK has had the lowest level of investment in the G7 for 24 of the last 30 years. The economic benefits that can be realised through data centre infrastructure will be crucial to the future economic prosperity of the country.
- 1.3.2 Data centre jobs are high-value, with even entry-level roles paid substantially above the

national average. Every £100 of GVA generated directly by data centres is estimated to create an additional £17-£164 across the wider economy.

- 1.3.3 The economic importance of data centres extends far beyond the on-site jobs they generate, they are fundamental to the UK's wider economic competitiveness. Supporting the rapidly expanding and highly productive technologies such as data processing, cloud computing and AI will determine the future success of the economy. These technologies are also not hypothetical, we have seen evidence of them already. The quantity of data created, captured, and replicated has seen rapid growth and is increasingly being stored and processed within data centres, rather than individuals' devices. Cloud computing and AI have seen rapid adoption rates and have shown demonstrated productivity increases for adopters. Further, the eight key growth sectors within the Modern Industrial Strategy are reliant on data centre infrastructure – any limitation on data centre capacity will have negative effects on the growth rates of these sectors.

### 1.4 Data Centre Market Assessment

- 1.4.1 The UK has become one of the world's most competitive data centre markets. Within the London region, the Slough Availability Zone (SAZ) is the largest and most mature availability zone. It already accommodates global operators including AWS, Microsoft, Google, IBM and Oracle.
- 1.4.2 The scale of demand has been exceptional: between 2012 and 2024, data centre capacity in the SAZ increased by a factor of 10. This growth has outpaced global averages, underlining the zone's international importance.
- 1.4.3 Recent planning appeal decisions reinforce the strength of demand. Inspectors and the Secretary of State have consistently accepted that there is a very significant level of unmet need in the SAZ. For example, the Court Lane, Iver decision (2024) identified a 1,730 MW requirement by 2027, equivalent to 12-15 new hyperscale facilities. The Woodlands Park, Iver decision (2025) noted a mid-range need of 2,486 MW between 2024 to 2029.

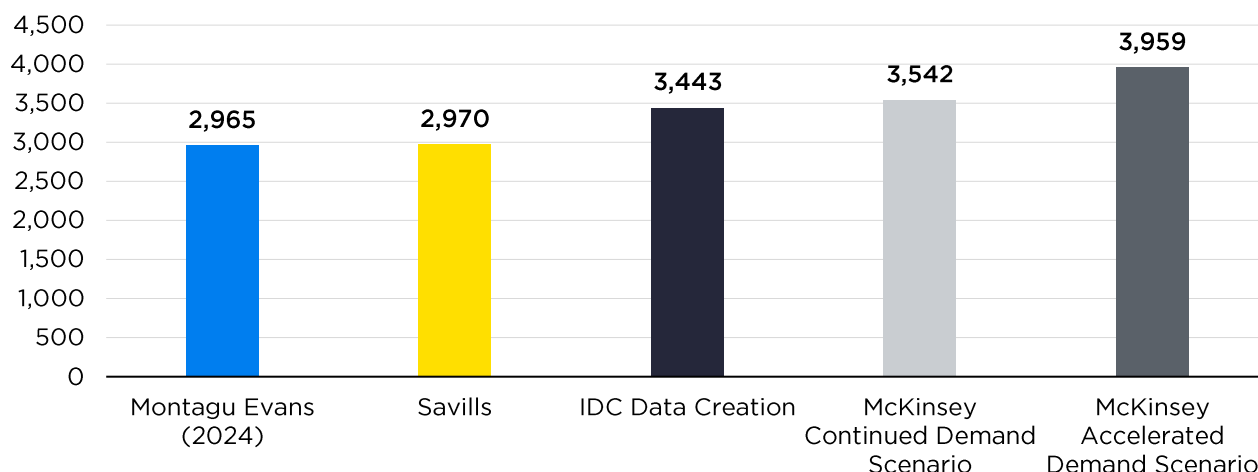
### 1.5 Future Data Centre Demand and Supply

- 1.5.1 My baseline modelling indicates demand of around 2,970 MW by 2030 within the Study Area<sup>1</sup>. My estimates are similar to those from Montagu Evans but lower than some of my various sensitivity tests as shown in **Figure 1.1** below.

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<sup>1</sup> as defined in the Alternative Sites Assessment produced by Alex Cole of Savills

**Figure 1.1 Future Data Centre Demand Estimation – Study Area/ SAZ (2025-2030)<sup>2</sup>**



*Source: Savills analysis using DCByte data, Data Centres Proof of Evidence – Ashley Collins – Woodlands Park Landfill Site, Land South of Slough Road, Iwer November 2024, IDC, McKinsey & Company*

- 1.5.2 By contrast, the identified pipeline of supply amounts to just 1,152 MW, with a further 559 MW possible at the Slough Trading Estate. There is also uncertainty as to when and if all of this capacity will be delivered given time and power constraints.
- 1.5.3 If all of this supply comes forward by 2030, which is highly unlikely, there is a need shortfall of approximately 1,259 MW against my baseline demand estimates. Even under my most pessimistic scenario, a deficit of around 386 MW remains. However, it is important to note, I do not consider my pessimistic scenario representative of future demand. It is also substantially out of kilter with my other sensitivity tests.

**Table 1.1 Need Shortfall to 2030 within the Study Area/ SAZ for the different demand scenarios<sup>3</sup>**

	A. Demand Estimate (MW)	B. Study Area Supply (MW)	C. Future Supply - Slough Trading Estate (MW)	D. Need Shortfall (MW) = A - (B+C)
Savills Baseline	2,970	1,152	559	1,259
Montagu Evans	2,965	1,152	559	1,254
IDC Data Creation Trend	3,443	1,152	559	1,731
McKinsey Continued Demand	3,542	1,152	559	1,831
McKinsey Accelerated Scenario	3,959	1,152	559	2,247
Pessimistic Scenario	2,097	1,152	559	386

- 1.5.4 The conclusion is clear: without new sites being brought forward, demand will significantly outstrip supply. This risks lost investment to competing global markets and undermines the UK's digital resilience.

<sup>2</sup> Replication of Figure 5.3 in the full Proof of Evidence

<sup>3</sup> Replication of Table 5.6 in the full Proof of Evidence

### 1.6 Conclusion

- 1.6.1 Data centres are now established as critical national infrastructure. Demand is being driven by AI, cloud computing, and the wider digital economy, all of which are growing at pace. Independent evidence from Savills, Montagu Evans, IDC and McKinsey confirms that by 2030 there will be a substantial need shortfall in capacity within the SAZ, amounting to around 1,820 MW based on my baseline estimates. This shortfall cannot be addressed by the circa 559 MW of data centre capacity that the Council states could be delivered within the Slough Trading Estate over the next 7 years (ie a 1,259 MW need shortfall remains).
- 1.6.2 The separate ASA demonstrates that the Appeal Site is the only site that can deliver the Appeal Development. Planning positively for its delivery is necessary to secure national resilience, safeguard the UK's competitive position, and ensure alignment with Government policy objectives for the digital economy.

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