

ECOSYSTEM REPORT 2023

Digital Infrastructure: An Irish Export Success





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CHAPTER

Ireland's Thriving Digital Infrastructure Ecosystem



Garry Connolly Founder Host In Ireland

" Decarbonisation and digitalisation are inextricably linked in order to achieve a sustainable future. "



This year marks the 50th anniversary of Ireland becoming a full member of the European Economic Community, the precursor to today's European Union. In that time, we have seen Ireland develop from an agricultural-based economy with high unemployment and high emigration to a tech-led economy with low unemployment and a net importer of people. This is not by accident. The transformative effect ICT and data-led industries, along with pharmaceuticals, finance and life sciences, has had on the country these past five decades has rightly earned Ireland a prominent role on the world stage and equipped the digital infrastructure industry to be more strongly positioned than ever before.

Decarbonisation and digitalisation are inextricably linked in order to achieve a sustainable future. Smart transport, smart buildings, smart agriculture, smart grids and more are all working together to optimise energy usage and facilitate the transition to a sustainable society. So much so that, according to a <u>report</u> from the European Commission, Directorate-General for Communication Networks, Content and Technology, smart ICT solutions can save up to ten times more greenhouse gases than caused by the entire ICT chain itself. These devices do not do this alone. As I've said before, anything with "smart" in this context in front of it, there is a data centre behind it.

In Ireland and around the world, the next pillar in this transition will be moving from consumer actions like households with solar panels to industries, like digital infrastructure, becoming prosumers of electricity. The prosumer era means there is both





Garry Connolly Founder Host In Ireland

" The demand for talent and digital infrastructure expertise has never been greater nor in such short supply.

a give and take as companies, like data centres, interact with the grid. This is a role that will become more significant as power grids smarten and evolve. For example, lithium-ion battery banks at one of <u>Microsoft's</u> data centre facilities in Dublin are helping stabilise the grid during times of high demand for renewable energy sources, while also serving as backup power for the data centre. As councils and municipalities start to develop district heating systems, the waste heat from data centres, such as <u>Amazon</u>, will actively contribute to the grid. Looking into the medium term, the emergence of <u>energy parks</u> complete with colocated wind, solar, green hydrogen, battery and data centres is very encouraging as it assists in taking pressure off the national grid whilst sustaining the economic benefits of data to the Irish economy.

As we step into the post-Covid era, the digital behaviours formed and expectations created are going to have a lasting impact. The work from home culture is not going away anytime soon and will require more digital infrastructure support as the tools evolve and grow to meet this demand. With these societal drivers firmly in place the demand for talent and digital infrastructure expertise has never been greater nor in such short supply.

The 2022 Host in Ireland Ecosystem report introduced the concept of what the **IRISH** digital infrastructure ecosystem is. In it, we explained who the companies were and defined cohorts of how they operate within the system. We also shared why companies doing business in and from Ireland have been able to influence the global data centre market.

This year we are looking at the ecosystem in action. Why the Irish ecosystem is in such demand on global projects and what are the characteristics of it that make it so transportable. We are also trying to understand why the talent that comes through or from Ireland is so highly sought after and why that makes it one of the most exportable – and successful – elements of the industry.

As with everything else we do at Host in Ireland, we look to do the right thing for the right reasons and now is the right time to tell the story of what makes the Irish digital infrastructure ecosystem so unique. At a time when apprenticeships are opening up and young students are expressing an interest in the industry, the timing could not be better. Showing the opportunity in hand and why the Irish ecosystem is so exportable and successful, not only gives a glimpse into a future career, but also reminds us of all of the exciting opportunities we have as an industry ahead of us.

Garry Connolly

Founder



In a 2022 mid-year survey among our partner companies we found out that:





Garry Connolly Founder Host In Ireland

" Showing the opportunity in hand and why the Irish ecosystem is so exportable and successful, reminds us of all of the exciting opportunities we have as an industry ahead of us. "

CHAPTER

Exporting Irish Talent



In the 2022 Host in Ireland Ecosystem report, we explored what made Ireland an intrinsic home to digital infrastructure and Irish companies so successful. The common thread that runs throughout companies who work from and within Ireland no matter how big or small they are was simple: Ingenuity, Relentlessness, Integrity, Strength and History. In other words, IRISH The IRISH digital infrastructure ecosystem has become a key influencer in the global market, but why? What is it that makes us unique?

Today we are looking at the people behind the industry and exploring why talent developed in Ireland is coveted around the world. Where decisions were once made out solely of US headquarters, we now see key heads of influence sit in or come through Ireland more than ever before. What role has the Irish diaspora played in making this happen? Ingenuity
Relentlessness
Integrity
Strength
History

To help us better understand this phenomenon, we sat down with Tom Gorman, Director of Operations at Digital Realty; Ailish McDonnell, Senior Development Manager at Yondr; and Ciarán Forde, Business Segment Manager for Data Center and ICT at Eaton for their thoughts on why the Irish are in such demand.

Q: Why does the data centre industry look to Ireland for skills and services for their global projects? What is it about Irish talent that is so attractive?

<u>Tom Gorman</u>: I think one of our biggest selling points is that as a nation and as a culture we're comfortable operating in global environments. Very early, for historical reasons, the Irish people embraced globalisation. We have a long history of emigration. We've exported a lot of talent and have gotten that talent back with different experiences of operating in globalised markets and global economies.

If you look at the talent in the data centre industry in Ireland at the moment, all of the top executives have worked abroad. We've all worked for global multinational companies and brought that experience back into Ireland. I think that's a really valuable commodity for us as a nation.

While it may have started as a necessity, what we see today is the impact of that by building globalised businesses here in Ireland with talent that can work anywhere.

Q: Ailish, at Yondr you are a great example of the influence of the Irish in that, while you don't have a data centre campus in Ireland, you've got a substantial group of people who are making decisions that are influencing your global data centre strategy.

<u>Ailish McDonnell</u>: Yes, absolutely. The team we've built in Dublin is mainly around development - site selection, site searches, etc. They are the bread and butter of our organisation and it's not a coincidence. The nature of the Irish people is to go out and build relationships and we see that reflected in this team. They go into new regions and try to break down barriers and have discussions to open up new markets.

Tom Gorman: I think that is true for the industry as a whole as well. When you look at the multinationals - the Amazons, Googles, Microsofts, Metas- it's no coincidence that their European headquarters are all based in Dublin. That decision making capability is in Dublin and it's driving global expansion, not just expansion into EMEA.



Tom Gorman Director of Operations Digital Realty

"We've exported a lot of talent and have gotten that talent back with different experiences of operating in globalised markets and global economies."



Ailish McDonnell Senior Development Manager ⁄ondr

" The nature of the Irish people is to go out and build relationships and we see that reflected in (our) team. "





Ciarán Forde Business Segment Manager for Data Center and ICT Eaton

" The ecosystem really comes alive in that each of us feels personally compelled to see someone else do okay and our fellow compatriots succeed. "

Q: Ciarán, are there any other factors that you see contributing to why the Irish are successful in the global data centre industry?

<u>Ciarán Forde</u>: I think the point about the ability of Irish people to travel is a foundational one, but it doesn't account for the success. I think there are three key things that contribute to our success.

One, the decision to headquarter these companies in Dublin brought that business to Ireland. You don't see that in other industries because they are not headquartered here.

Two, the ability to be effective in the construction and contracting business is very tuned into the Irish pragmatic way of problem solving.

Three, the ecosystem really comes alive in that each of us feels personally compelled to see someone else do okay and our fellow compatriots succeed. The ability to connect and reach out and be willing to be generous with your time is actually what creates the ecosystem. It's the glue that holds it together.

Q: Can you tell us a bit more about the pragmatic approach to problem solving?

Tom Gorman: I think it goes one step further than just being pragmatic. We cut through the nonsense and just get on with it. With our contractors we have a hands-on approach with a direct line of communication. We make sure we are identifying risks upfront and fixing them before they become a problem.

<u>Ciarán Forde</u>: The sense of the collective I mentioned earlier is also a sense of achievement and I think that is fundamental to who we are. I've worked in countries where people are more than happy if an issue comes up to bring things to a halt on site. You just don't see that with the Irish teams no matter what project they are on or where in the world they are. We're not fazed by complexity or ambiguity. The rules may be different, but the Irish understand that not everything is linear. We'll look for what's wrong and safeguard projects along the way.

Q: How future proof is the ecosystem? What will enable it to build upon what's already been created?

Tom Gorman: I think the one thing that we can future proof – and export – is developing the culture of how we work and how we operate. While many of us were globally educated in a work environment, we brought it home, made it work better and put an Irish culture stamp on it. It's become the culture of how we do business, not just in Ireland but everywhere. We're raising generations into that culture as a way of working

<u>Ailish McDonnell</u>: We're involved end-to-end of the business from looking at sites to conceptual design to construction. We see this playing out at every stage of the development of the data centre and in every business that touches the industry, particularly when it comes to Irish pupils. It's become ingrained in the Irish business culture and this is naturally what they are learning. The potential opportunities around that are wide open.



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CHAPTER

Exporting the IRISH Ecosystem: Focus on Denmark The qualities and characteristics of what it means to be **IRISH** showcases how the digital infrastructure ecosystem from Ireland does business both at home and abroad. It's why the ecosystem has been so successful in Ireland and why demand is high for it in the global marketplace. The ecosystem exports talent and services across Europe and into the Middle East, Africa, Asia and the Americas.

Across Europe, the growth of the digital economy and the increasing demand for cloud computing services have been major drivers for the growth of Tier 2 data centre markets in Europe. The transportability of the Irish digital infrastructure ecosystem is well in play as Host in Ireland partners have many projects in these locations, including the Nordics, Eastern Europe, Spain and more.





THE IRISH

Successful execution of projects with key accounts in Ireland, and trusted relationships built through those experiences, have opened the door to this expansion. According to *David Phelan*, Business Development Director at Suir Engineering, "We're strategically looking at where our customers are going and building on the good work we've done for them in Ireland previously. We then develop that relationship by exporting our quality of work and design technology – that ethos carries over to projects internationally."

OFFICE LOCATIONS OF 2023 HOST IN IRELAND PARTNER COMPANIES





David Phelan Business Developmen Director Suir Engineering

"We're strategically looking at where our customers are going and building on the good work we've done for them in Ireland previously."



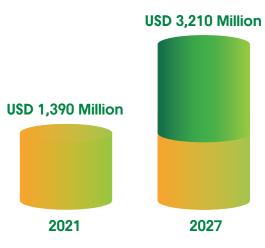
FOCUS ON DENMARK

Denmark is just one example of the Irish digital infrastructure ecosystem in action internationally. The market has been growing rapidly in recent years and is <u>expected</u> to reach an estimated total of +400MW of data centre capacity by the end of 2025. With the country's high level of support for public spending on infrastructure it supports a busy construction economy. The digital infrastructure expertise from the Irish ecosystem nicely compliments the local projects.

This benefits data centre projects as the learning curve on working together has already been established so the project can run more efficiently. It also opens the door to creating a more lasting legacy within a geography as the business expands. "In some regards, it's an easy option from a procurement perspective to bring in a trusted supply chain to work on a project," said Cormac McKenna, Regional Director Europe at Flynn. "We certainly don't take that for granted, but there is great payback in building the local connections."

Danish Data Centre Market

Market forecast to grow at a CAGR of 15.0%





Cormac McKenna Regional Director Europe Flynn

" ...there is great payback in building the local connections. "

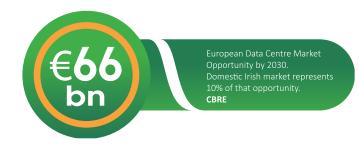


Roy Millar Managing Direct Ardmac

" Denmark is a location our staff like to work in. They start to set up lives in the country and want to stay. That motivates us to expand the business in that location. " Working and living in a multicultural environment enables employees to gain skills and confidence that help them develop personally and professionally. "Denmark is a location our staff like to work in. People are friendly and you are made to feel very welcome. Because of that our teams enjoy being there and start to set up lives in the country and want to stay," said <u>Roy Millar</u>, Managing Director at Ardmac. "That then motivates us to continue to build the pipeline and expand the business in that location."

Building that pipeline is not only good for Host in Ireland partners, but also the local communities. When 1200 people come onto a project, they are supporting local businesses and schools and driving revenue into the local economies. As projects evolve, opportunities are also created for establishing a longer term local supply chain. Successful projects in Denmark can also open up other opportunities in the rest of the Nordic market.

The expertise and experience with large scale data centre projects is a valuable asset for the Irish digital infrastructure ecosystem. These services are location agnostic and a big part of the reason why digital infrastructure coming from Ireland – with global and Irish companies – plays a unique role around the world. It is the foundation of the long-term service exports opportunity for the digital infrastructure industry.



CHAPTER

Host in Ireland Digital Infrastructure Ecosystem

A rich and diverse set of companies is reflected in the breadth and depth of Host in Ireland's partners. Our partners are responsible for selecting, planning and design during the pre-construction phase of a data centre build. They are also phase of construction of the base building and commissioning of a data centre. The largest cohort of Host in Ireland partners equip data centres with the IT equipment, infrastructure, HVAC and other operational systems as they move from the construction to the operational phase of the data centre. Finally, our partners own and operate data centres and are responsible for the daily functioning of services to and for a data centre, as well as the raising of the capital to refresh older centres and the building out of new ones.

PLAN & DESIGN

Brokerage & Development

- Legal Services
- Design & Engineering
- Architecture
- Project Management & Consultancy
- Roofing, Earthing & Lightning Solutions
- Data Centres Owner & Operator

Host In Ireland

OWN & OPERATE

- Facility Services
- Utilities
- Roofing, Earthing & Lightning Solutions
- Asset Management,
 Security Monitoring & Fire
- Protection
- Network Connectivity
 Project Management &
- Consultancy Recycling & Desmantling Data Centres Owner & Operator
- Legal Services

DIGITAL

ECOSYSTEM

BUILD

- Construction
 Project Management &
- Project Management a Consultancy
- Electrical & Mechanical Installation
- Roofing, Earthing &
- Lightning Solutions
- Commissioning
- Data Centres Owner &
- Operator

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EQUIP

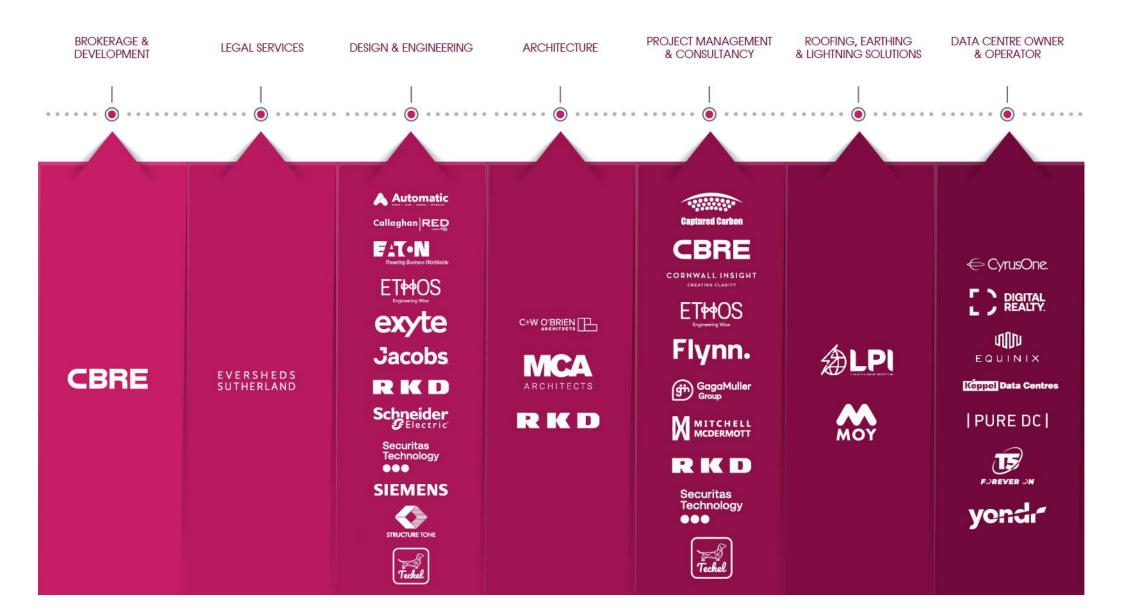
- Power Systems, Power Distribution,
- Management, Metering & Monitoring
- Security & Fire Protection Systems
 Roofing, Earthing & Lightning Solutions
- Project Management & Consultancy
- HVAC
- Rack Systems
- UPS Systems & Batteries
- Airflow Desing & Solutions
- Fibre & Network Connectivity
- Cabling & Network Products

ITSYS IN IRELANI



PLAN AND DESIGN

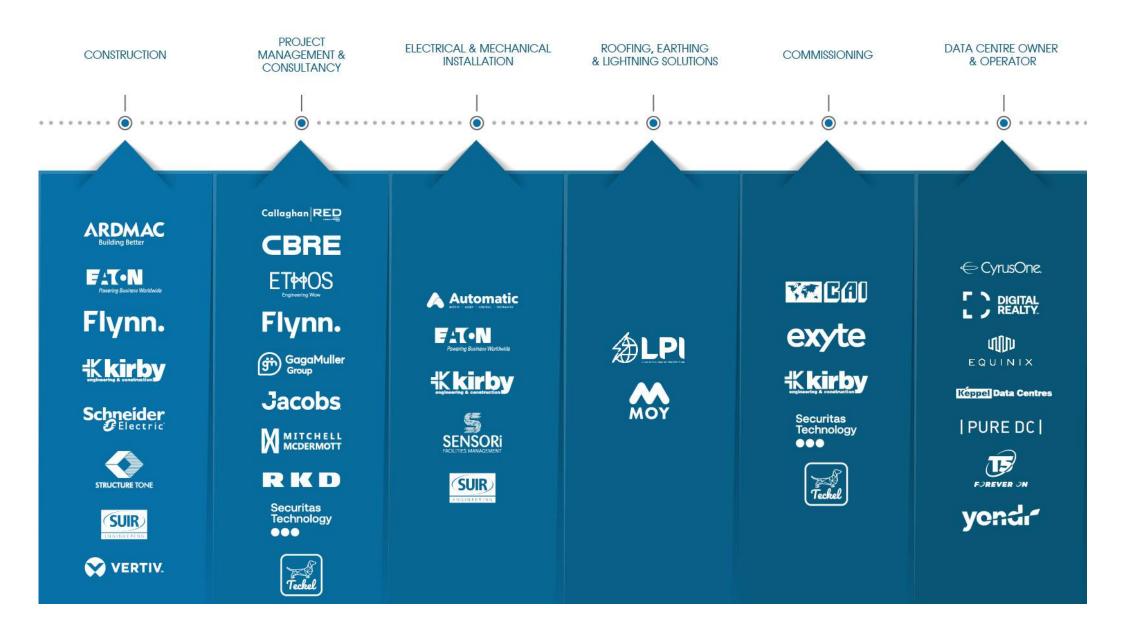
Companies in this cohort are responsible for the processes taking place before construction of the physical data centre building begins. These functions include site selection, legal and financial support, workforce support, facility planning, data centre design and engineering, plus various consulting and professional services.





BUILD

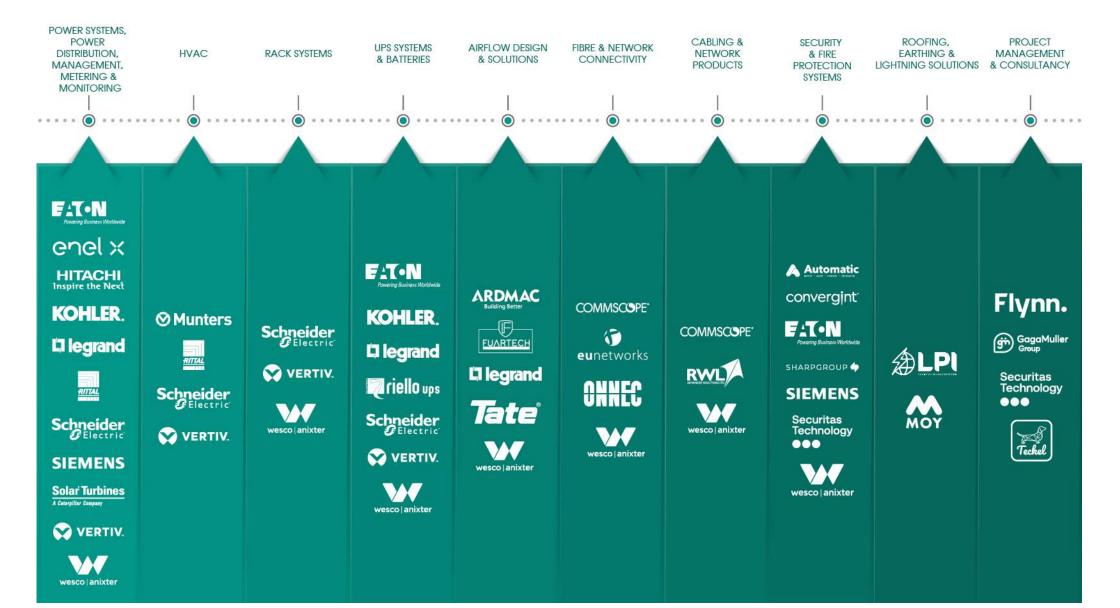
This cohort involves the actual construction of the base building and the commissioning phase of the data centre. This includes construction, roofing, lighting, power, etc.





EQUIP

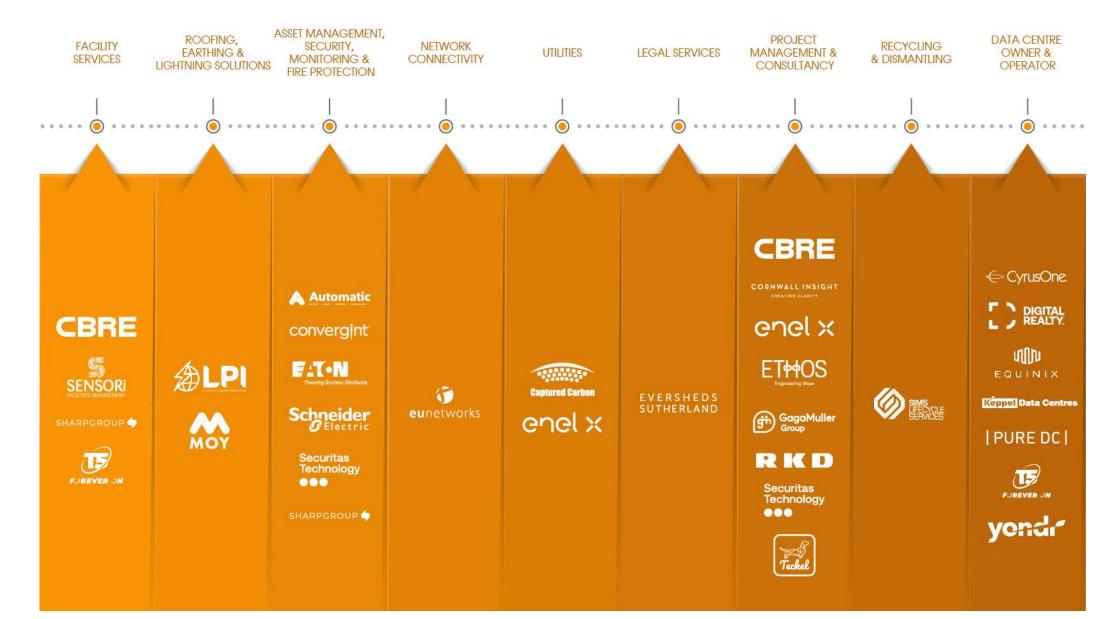
The largest of the four cohorts, companies involved here have the widest responsibility as the data centre moves from being under construction to operational. This includes core components of standard IT equipment and software (e.g. servers, networking devices), infrastructure such as racks, HVAC and electrical systems, and other computing infrastructure resources. Support infrastructure systems are also included and represent the physical security of the space, HVAC cooling, Uninterruptible Power Sources (UPS), as well as utility services infrastructure.





OWN AND OPERATE

These organisations are responsible for the daily running of the data centre. These are services such as utilities, security, facility services, cleaning, consultancy, legal, marketing, HR, and recycling & dismantling.



CHAPTER

Host in Ireland Partner Company Profiles



In this chapter you will get to know our **54 partner companies** who are the key data centre related service and technology providers within Ireland. Some of our partners are multinationals with operations in the Irish market. Some of them have chosen Ireland as their European base. And as you have seen in previous chapters, a number of our native Irish partners are now successfully running digital infrastructure around the world.

Regardless of their origin or size, all of our partners form an important part of the Host In Ireland Data Centre Ecosystem and the wider digital infrastructure landscape. Individually, within their fields of expertise, and together- in the spirit of "co-opetition"- they innovate the ways our digital infrastructure is being designed, built and operated.



PARTNER **IRE**

"We pride ourselves in providing our clients proven technical solutions with cost and programme certainty, greatly assisted by engaging as early as possible with all those impacting the construction process."



Roy Millar

MD of Data Centres



www.ardmac.com



CONSTRUCTION AIRFLOW DESIGN & SOLUTIONS

Ardmac is an international construction company delivering complex high value workspaces and technical environments. We are a leading global provider of data centres and modular solutions and have been providing high quality spaces to fast moving and evolving markets for more than 45 years.

At Ardmac, our reputation is built on delivering results and exceeding client expectations. As a specialist contractor, we provide the architectural fit-out of Datacentres, offering a range of solutions, including Hot & Cold Aisle Containment (HAC's). We seek to drive efficiencies utilising lean principles, early contractor involvement, maximising BIM & 3D visualisation, smart digital processes and by taking a DFMA approach where possible.

- Architectural Fit-Out of Data Centres
- Hot & Cold Aisle Containment
- Modular Data Centres
- Seismic and Structural Ceilings
- Doors & Security Packages
- Fit-Out of Ancillary Areas
- BIM & 3D Visualisation
- DFMA

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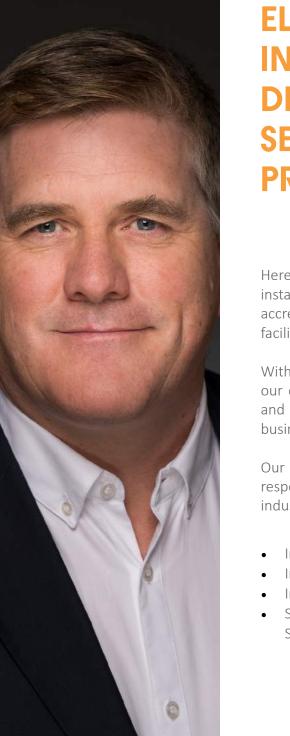
" Our multidisciplinary team ensure that from design to installation we provide a bespoke fire detection and water or gas suppression solution which brings our customers peace of mind."



John Nolan

Business Development Director

in <u>www.automaticfire.ie</u>



ELECTRICAL & MECHANICAL INSTALLATION DESIGN & ENGINEERING SECURITY & FIRE PROTECTION SYSTEMS

Here at Automatic, we are experts in the field of designing and installing sprinkler and gas suppression systems. Fully industry accredited and certified, we can deploy a new system for your facility or maintain your existing installation.

With our headquarters in Dublin, we have the ability to service our clients across Europe, Africa and further afield. Irish owned and managed, we are exclusively dedicated to the fire protection business.

Our engineers and designers are recognised as experienced and respected individuals among their peers within the construction industry.

- Installation of Sprinkler Systems
- Installation of Gas Suppression Systems
- Installation of Fire Alarm Systems
- Service & Maintenance of Automatic & Other Installed Sprinkler, Gas & Fire Alarm Systems

"We are delivering the next generation of data centres for our international clients locally."



Arthur O'Brien

Managing Director



www.cwoarchitects.ie



ARCHITECTURE

Our practice is built on delivering design-driven architectural solutions with a commercial edge that ensures we provide value by design. At C+W O'Brien Architects, we consider each project in a phased manner accounting for energy, security, and contextual environmental considerations. Our multidisciplinary team creates a positive working environment, allowing our clients to be co-designers enhancing project delivery. C+W O'Brien Architects have extensive experience in the design of complex data centres. We take into consideration a number of key factors and elements in our ata centre design, mission critical and industrial facilities.

- Architecture- Interior Design
- Site Appraisal & Masterplanning
- Conservation Assigned Certifier
- PSDP
- BIM & Digital Construction
- MMC & Sustainability

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" The ambition of CAI is to support and enable the data centre industry to achieve operational readiness and operational excellence."



Niall Killeen

Global Director



<u>www.dcxagents.com</u>



COMMISSIONING

Since CAI was founded in 1996, we have delivered nearly a billion dollars in services for hundreds of clients across thousands of projects globally. With offices in the US, Canada, Ireland, United Kingdom, Italy, Switzerland, Netherlands, India, China, South Korea, Singapore, Malaysia, and Australia, we have built an international team of over 800 professionals providing local support from a global company. We have delivered services in support of over 2000MW of IT load across multiple sites through EMEA, APAC and the Americas. Our engineering, technical, and consulting services are fashioned to deliver mission critical facilities with a high level of performance and reliability. When operational readiness and day-one performance are critical, CAI delivers to a higher standard.

- Construction & Commissioning Management
- QA/QC Services
- Mission Critical Facility Commissioning
- Existing & New Facility Commissioning
- Functional Performance & Integrated Systems Testing
- Commissioning Authority
- Energy Marshaling
- General Contractor Commissioning Support
- Low, Medium, And High Voltage Test Witnessing

" With ENGIE behind us, we're a truly global business. I'm excited about the investment and planned growth in our local teams."

Callaghan RED

Killian O'Neill

Director



<u>www.red-eng.com</u>



DESIGN & ENGINEERING PROJECT MANAGEMENT & CONSULTANCY

Callaghan | RED is recognised as the foremost data centre designer in EMEA. With dedicated MEP design engineers providing best-inclass services, we have delivered over 1000 data centre projects in over 70 countries.

With over 30 years of experience in Ireland alone; Callaghan | RED provides technical expertise to deliver multi-disciplinary lead consultancy and dedicated MEP design solutions. Our building physics, sustainability and R&D teams are industry leading.

As part of the ENGIE group, the mission is to help global clients accelerate their sustainable transformation toward a zero carbon future, making sustainability happen today.

We design the buildings that connect the world.

- MEP Services
- Lead Design Consultancy
- Building Physics
- CFD Analysis
- ICT Infrastructure Design
- Commissioning Management
- Sustainability Solutions

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" Captured Carbon assist Data Centres in the purchase of electricity as well as the trading of energy centres in the wholesale market. We implement sustainable renewable power procurement structures that align with their corporate values."



Niall Durham

Head of Origination, Business and Product Development

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POWER PURCHASE MANAGEMENT, DECARBONISATION UTILITIES

Captured Carbon (CCL) has been providing energy services on the Island of Ireland for over fifteen years, connecting renewable producers, suppliers & corporate off-takers in the wholesale energy markets. CCL focus has been on the decarbonisation of power and facilitation of renewables on the electricity grid. CCL was the first market participant in Ireland to trade in Guarantees of Origin from outside of Ireland and as a result has strong trading relationships with renewable generators throughout Europe. This experience has allowed us to now focus and develop decarbonising power indigenously through providing route to market for renewables and by connecting corporate users with renewable generators in Ireland through a Corporate Power Purchase Agreement. CCL is to the fore in advising large corporate's in how to achieve zero carbon electricity consumption. CCL's commercial, regulatory, and wholesale market expertise enable our clients to maximise revenues and deliver their business models in an everchanging and evolving electricity marketplace.

- Energy Decarbonisation Roadmap
- Corporate Power Purchase Agreements
- Energy Centre Optimisation
- Market Entry Consultancy for Energy Assets
- Carbon Audits and Management
- Green Certificate Procurement
- Electricity Market Trading services for Renewable, Thermal (Gas Plants) and Battery Assets

" CBRE unlocks maximum value and performance for your data center portfolio, reducing risk through operational strategies powered by technology and talent."



Alana Wilksch

Global Strategic Development Manager

in <u>www.cbre.ie</u>



BROKERAGE & DEVELOPMENT FACILITY SERVICES, PROJECT MANAGEMENT & CONSULTANCY

CBRE is the is the leading provider of lifecycle data center services, managing mission critical space across 700+ sites globally and delivering integrated solutions for data center owners, occupiers, and investors. CBRE's in-house team of 5,000+ data center experts deploy strategies and processes to meet data center reliability needs today, while staying ahead of tomorrow.

- Consulting
- Advisory & Transaction
- Project Services
- Critical Facility Operations
- Technology Operations
- Supply Chain Management
- Energy Optimisation & Management

"We manufacture High-Quality Critical Infrastructure needed to enable digital acceleration, providing confidence and reassurance to our clients that their network performance is safe and secure."

COMMSCOPE°

Adrian Hayes

Sales Director, UK & Ireland

www.commscope.com



FIBRE & NETWORK CONNECTIVITY

At CommScope we push the boundaries of communications technology to create the world's most advanced networks. We design, manufacture, install and support the hardware infrastructure and software intelligence that enable our digital society to interact and thrive. With decades of connectivity experience and through our global manufacturing operations, including a Copper and Fibre Plant in Bray, Ireland, our solutions bring the innovation, quality and flexibility that advance broadband, enterprise and wireless networks to power progress and create lasting connectivity, solving today's challenges and driving the innovation that will meet the needs of what's next.

- Innovation Digital Engineering
- Research & Development
- Manufacturing Excellence
- In-Region Operations
- High Quality Solutions
- PartnerPRO Network
- System Warranty
- Confidence
- Agility
- Sustainability

" Convergint pride themselves on being their Customers Best Service Provider, by providing leading Security Technology solutions to our clients in all corners of the globe."

convergint

Adrian Hill

Managing Director



www.convergint.com



ELECTRONIC INTEGRATED SECURITY SOLUTIONS

Convergint is a global systems integrator focused on delivering results for our customers through unparalleled service excellence. At Convergint, our top priority is service in every way — service to customers, colleagues, and community. As an integrator, Convergint works alongside a global network of partners and manufacturers to design, install, and service security, fire alarm, life safety, audio-visual, and building automation solutions for enterprise customers. Our unique and empowered culture, guided by our values and beliefs, helps us stay accountable to our mission, and our number one objective: to be our customers' best service provider.

- Access Control
- Video Surveillance
- Perimeter Protection
- Identity and Asset Mangement
- Edge and Modular Solutions
- Environmental Monitoring

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" Our friendly team are market experts across the energy value chain and break down complex issues in an easy-tounderstand way."

CORNWALL INSIGHT

Ruth Young

Senior Consultant

in

<u>www.cornwall-insight.ie</u>



CONSULTANCY

Established in 2005, Cornwall Insight is one of the most respected voices in the energy industry. We provide research, analysis, consulting and training to businesses and stakeholders in the Great British, Irish and Australian energy markets. Our team has a distinct subject matter expertise across the Island of Ireland on both the current energy market and changes in the future, leveraging decades of consultancy experience and international perspective through our groupwide capabilities, making us the partners of choice in our customer's net zero transition across the energy value chain. We simplify complex markets and regulatory arrangements and provide an independent perspective on sector developments. Based in Dublin but covering the whole market, we partner and support companies across the entire spectrum, from start-ups to large utilities, and all different types of investors in the Irish energy sector.

- Consultancy: Bespoke project and advisory to companies across the energy industry.
- Examples of Support: Business case modelling, Due diligence, Market intelligence, Route to market support.
- Insight services: Market intelligence subscription services that analyse the latest industry developments.
- Learning and Development: Market leading learning on the energy markets and net zero transition.

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" With a track record of meeting and surpassing the aggressive speedto-market demands of hyperscale cloud providers, as well as the expanding IT infrastructure requirements of the enterprise, CyrusOne provides the flexibility, reliability, security, and connectivity that foster business growth."

CyrusOne.

Mark Moloney

Director Interconnection Solutions and Sustainability

www.cyrusone.com



DATA CENTRE OWNER & OPERATOR

CyrusOne is a leading global data center developer and operator specializing in delivering state-of-the-art digital infrastructure solutions across the globe. With more than 50 high-performance mission-critical facilities worldwide, the Company ensures the continued operation of digital infrastructure for nearly 1,000 customers, including approximately 200 Fortune 1000 companies. CyrusOne's leading global platform of hybrid-cloud and multi-cloud deployments offers customers colocation, hyperscale, and build-tosuit environments, which help enhance the strategic connections of their essential data infrastructures and support the achievement of sustainability goals.

- Cloud Solutions- Tailored, hybrid cloud solutions across a multi-data center platform, enabling workloads to move easily between data centers, public and private clouds.
- Connectivity Solutions- Robust connectivity and the flexibility to scale for future growth.
- Colocation- Highly reliable design architectures to support flexible power requirements (2N, N, or both) and rack power densities of 250 watts per square foot or up to 900 watts per square foot.
- Hyperscale Solutions Large facilities designed to efficiently house the scalable server architectures of a single customers hyperscale computing needs
- Build-to-suit- CyrusOne's design & construction team to build a custom data center to fit a single customers unique requirement.

" At Digital Realty, our purpose is to bring companies and data together, in bold new ways, to power the innovation determining our future."

Niamh Dundon

Marketing Manager



www.interxion.com



DATA CENTRE OWNER & OPERATOR

Digital Realty brings companies and data together by delivering the full spectrum of data centre, colocation and interconnection solutions. PlatformDIGITAL[®], the company's global data centre platform, provides customers with a secure data meeting place and a proven Pervasive Datacenter Architecture (PDx[™]) solution methodology for powering innovation and efficiently managing Data Gravity challenges. Digital Realty gives its customers access to the connected data communities that matter to them with a global data centre footprint of 300+ facilities in 50+ metros across 25+ countries on six continents.

- Colocation Services to support your hybrid IT Strategy
- The only colocation provider in Ireland with direct access to AWS Direct Connect and Azure ExpressRoute
- ServiceFabric seamlessly interconnecting workflow participants, applications, multiple clouds and ecosystems
- Cross Connects, a range of connectivity options to minimise networking costs, significantly reduce latency and improve application performance

" At Eaton, we pride ourselves on helping data centres realise real business benefits today while optimising their operations for the future."



Ciarán Forde

Data Centre Segment Leader – EMEA

www.eaton.com



DESIGN & ENGINEERING, POWER SYSTEMS, POWER DISTRIBUTION, MANAGEMENT, METERING & MONITORING, ELECTRICAL & MECHANICAL INSTALLATION

Every day, all around the world, people depend on technology, transportation, energy, and infrastructure to live and work. Eaton is an intelligent power management company that is dedicated to improving the quality of life and the environment with sustainable power management technologies that are more reliable, efficient, and safe.

With the rise of big data, edge computing and the cloud, data centres are under pressure to be more high-performing, sustainable and cost-effective than ever, without compromising resilience or security. At the same time, new opportunities and revenue streams require faster speed-to-market. With our digital intelligence, world-class cyber-secure products and services, reliable, compatible solutions and engineering expertise, we help data centres realise real business benefits today while optimising their operations for the future.

- IPower distribution From facility through to white space incl. Transformers, LV, MV Switchgear, PDUs
- Power conditioning, quality & backup incl. grid-interactive UPS
- Digital infrastructure management- Software
- Modular and prefabricated systems
- Onsite energy storage
- Electrical & mechanical subsystem components
- Safety & Emergency communications
- Racks & enclosures
- Electric vehicle charging stations
- Design, build, planning & support services

"Being at the forefront of the energy transition is a responsibility that unites everyone at Enel X. Together, we work to create a more sustainable future for us all."

enel ×

Lucy Plant

Manager Strategic Partnerships, Energy Solutions



www.corporate.enelx.com



POWER DISTRIBUTION, MANAGEMENT & METERING, UTILITIES, PROJECT MANAGEMENT & CONSULTANCY

Enel X Global Retail is the Enel Group's global business line that enables more independent and sustainable energy use. As a leader in the energy transition, we provide consumers, businesses, and cities with innovative, platform-based solutions that embrace electrification and digitalisation to create new value. We help our customers develop their own energy roadmaps that enhance energy performance and achieve net zero targets, from initial consultation to execution.

Enel X Global Retail currently manages 8.2 GW in total flexible demand response capacity and has installed 751 MW of battery energy storage capacity. (BTM, FTM, Enel Plants)

- Energy market access and optimisation
- Grid balancing and energy flexibility programmes
- Battery energy storage and solar PV systems
- Energy spend and emissions reporting
- Renewable energy procurement and Net Zero advisory

" Equinix empowers Ireland's enterprises and thriving digital economy to grow sustainably and realise their full potential through our unique global platform and digital services."

Peter Lantry

Managing Director, Equinix Ireland



<u>www.equinix.ie</u>



DATA CENTRE OWNER & OPERATOR

Equinix is the world's digital infrastructure company. We interconnect industry-leading organisations in finance, manufacturing, mobility, transportation, government, healthcare and education across a cloud-first world.

Globally, Platform Equinix is comprised of 240 data centers across 71 metros and 32 countries, providing data centre and interconnection services to 10,000+ companies including more than 50% of Fortune 500 companies. This unrivalled reach enables our customers to connect to all of the right partners in all the right places. Find out more about our business and our unique culture at <u>https://www.equinix.ie/about</u>

In addition to colocation services across the Dublin metro and Equinix's global footprint, Equinix's digital services enable customers to bring together physical and virtual technologies like compute, storage, network and applications to build a foundation for a company's digital operations.

- Equinix Fabric[®]: a software-defined interconnection platform, Equinix Fabric is the world's first real-time interconnection technology built especially for digital infrastructure.
- Equinix Metal[®]: automated bare metal servers and storage appliances enable customers to bring together and interconnect hybrid multicloud infrastructures at a global scale.
- Network Edge: virtual networking devices available on demand.

" With a global footprint of 45 data centres, Ethos are the experts when it comes to excellent data centre design."



Greg Hayden

CEO

n <u>www.ethoseng.ie</u>



DESIGN & ENGINEERING, CONSULTANCY & PROJECT MANAGEMENT

Established in 2005, Ethos is one of Europe's leading experts in Data Centre MEP Design, with data centres across 19 different countries totalling over 2790 MW.

Ethos employs over 160 staff across worksites throughout EMEA, expanding its presence on the global stage.

With a reputation for delivering industry-leading designs, Ethos is rewarded with repeat projects and has built rapport for opening new markets and developing local supply chains. Our membership in First Q, a network of 15 European MEP consultancies with 4,000 staff, is an invaluable advantage.

Ethos is consistently awarded for industry excellence, including First in the World WELL Performance Rating, Best Organisation to Work for 2019 and 2022, Consultancy of the Year 2015, 2016, 2017, 2021, Engineering Firm of 2018, 2019, and 2020, Fit Out Consultancy of 2018, 2019, 2020, and 2022, Engineering Practice 2019 and 2022, KPMG Workplace Innovation 2022 and Sustainability Team SME of 2022.

- Mechanical & Electrical Design Consultancy
- Design Team Management
- Building Physics & Green Ratings
- Smart Buildings

"We continue to focus on delivering the best possible bandwidth solutions for our customers and building networks that are critical to Europe's future bandwidth needs."



Hannah Britt

Chief Marketing Officer



NETWORK CONNECTIVITY



euNetworks is a critical bandwidth infrastructure company, owning and operating 17 fibre based metropolitan networks connected with a high capacity intercity backbone covering 53 cities in 17 countries across Europe.

The company leads the market in data centre connectivity, directly connecting over 500 today. euNetworks is also a leading cloud connectivity provider and offers a targeted portfolio of metropolitan and long haul services including Dark Fibre, Wavelengths, and Ethernet. Wholesale, finance, content, media, mobile, data centre and enterprise customers benefit from euNetworks' unique inventory of fibre and duct based assets that are tailored to fulfil their high bandwidth needs. For further information visit *eunetworks.com.*

- Dark Fibre
- Wavelengths
- Ethernet
- Internet
- Data Centre Connectivity
- Cloud Connectivity
- euTrade Ultra Low Latency services
- Private Connect
- OLS- Multi Service Ports
- Metro Connectivity
- Long Haul Connectivity

" Our multi-disciplinary team at Eversheds Sutherland are fully immersed in the data centre sector, not only understanding the legal issues but also having a deep understanding of the market across multijurisdictions."

EVERSHEDS SUTHERLAND

Marie McGinley

International Head of Technology & Head of Intellectual Property, Technology and Data Protection



www.eversheds-sutherland.com



LEGAL SERVICES

Eversheds Sutherland is a global top 10 law firm that provides multidisciplinary legal advice and solutions to a global client base. The firm has over 70 offices in over 30 jurisdictions worldwide. Its Irish offices (Dublin and Belfast) serve as an important European hub for the firm's international client base and employ over 300 talented professionals. The firm provides a full range of legal services, including corporate and M&A, dispute resolution and litigation, energy and infrastructure, data protection, insurance and financial service, employment and pensions, intellectual property, real estate and construction, and tax.

Eversheds Sutherland holds the internationally recognised ISO 27001 certification for its exemplary data protection and information security in the Republic of Ireland and Northern Ireland for its Dublin and Belfast offices. This ensures the firm follows best practices in protecting its data, improving its cybersecurity posture and business efficiency, while also ensuring that it meets legal and regulatory data protection obligations.

- Site acquisition and development
- Partnering arrangements
- Leasing agreements, co-location leases and third party agreements
- Construction and infrastructure
- Tax and structuring
- Employment law
- Outsourcing and data hosting
- Advising on energy; connection and supply arrangements,
- renewables, improving green connections and planning for growth
- Regulatory and compliance issues, in a volatile sector, subject to rapid political changes in direction and strategy
- System security and risk management strategy

exyte

Marc Leddy Commercial Director



<u>www.exyte.net</u>



DESIGN & ENGINEERING COMISSIONING

Exyte is a global leader in design, engineering and delivery of facilities for high-tech industries. Exyte has operated in Ireland and Northern Ireland since 2000, applying global expertise, technology and engineering excellence to deliver some of the area's most advanced semiconductor, life sciences and data centre projects.

Exyte's Data Centres business segment focuses on building energy-efficient computing centres for cloud, high-performance computing, and co-location service providers. Key clients are large technology organizations that invest extensively in high-capacity cloud data centres worldwide. The business unit is also active for co-location service providers that offer additional capacity for scaling for cloud service providers.

Design, Engineering & Delivery of Facilities

" At Flynn, we bring the most suitable people together, matching expertise and experience with project and client requirements. Everyone on our team has a role in the success of the company."

Flynn.

Cormac McKenna

Regional Director



www.flynnmc.com



CONSTRUCTION, PROJECT MANAGEMET

Flynn has been in business for 18 years and provides a comprehensive range of construction management, fit-out and main contracting services. We are a dynamic team of construction and fit-out professionals delivering high quality buildings and interiors that are made to last, and attracting ambitious and innovative projects all across Ireland, England and the Nordic region.

Flynn is an international construction business that executes projects across the island of Ireland, the UK and mainland Europe. The directors of Flynn have successfully diversified the business, both sectorally and geographically, over recent years. This has been achieved while maintaining its consistent project approach by forging strong relationships with people, partners, subcontractors and clients. This approach allows Flynn to provide a consistent bestin-class delivery for all clients regardless of sector or jurisdiction.

- Delivering Critical Environments
- Fit-out Specialist
- Project Management

" Our word is our bond, we are always accessible and very easy to deal with. Fuartech prides itself on service, we are go getters, who get the job done."



Gareth Higgins

Director



www.fuartech.com



AIRFLOW DESIGN & SOLUTIONS

From early design, again all the way through to installation, and project sign off, our turnkey solutions offers you the comfort factor dealing with the experts in design and the people in the know how. We have our own in house installation teams, and installation arms all throughout EMEA to deliver your project to the highest standards.

At our core, we want to be recognized as pioneers in the data center industry, known for our streamlined approach, ability to exceed client expectations, and our team of top-notch engineers. What sets us apart is our relentless pursuit of excellence, evident in our innovative products, exceptional customer service, and team of skilled engineers.

- Hot/Cold Aisle Containment Manufacturers
- Manufacturers of Security Caging
- On Time Installation
- Project Management
- Servicing EMEA
- Site Survey
- 2D/3D CAD Modelling
- Custom Fabrication
- 24 hour on Site Servicing for Mission Critical Services

" GagaMuller Group unlock the value in every dimension across your projects using deep insights & real time analytics mixed with global expertise, creating strategies that drive superior, more predictable outcomes for your business."



Paddy Ryan

CEO



www.gagamuller.com



PROJECT MANAGEMENT & CONSULTANCY

GagaMuller Group vision is to build an environment that shapes a better, more connected & sustainable future using autonomous & spatial data. Unrivalled in the field of technology and digital implementation, with GagaMuller Group your business will discover success through limitless insights and infinite inspiration by pioneering digital change across your portfolio. This is achieved by connecting decision makers to a dynamic network of information. Accurately delivering a fully transparent real time data driven project controls experience throughout your entire project lifecycle. Allowing our clients to Build better with Data.

- Quantity Surveying
- Project Management
- Project Monitoring & Risk Management
- Digital Solutions & Systems Integration
- Design & BIM Management
- DFMA & Pre-con Management
- Logistic & Asset Management
- Schedule & Construction Management
- Change & Dispute Management
- Employers Representative
- Custom Software Development

" At Hitachi Energy, we are championing the urgency of a clean energy transition, through innovation and collaboration."

HITACHI Inspire the Next

Greg Collison

EU Data Center Account Manager



www.hitachienergy.com



POWER SYSTEMS, POWER DISTRIBUTION & MANAGEMENT

Hitachi Energy serves customers in the utility, industry and infrastructure sectors with innovative solutions and services across the value chain. Together with customers and partners, we pioneer technologies and enable the digital transformation required to accelerate the energy transition towards a carbonneutral future. We are advancing the world's energy system to become more sustainable, flexible and secure whilst balancing social, environmental and economic value. Hitachi Energy has a proven track record and unparalleled installed base in more than 140 countries. Headquartered in Switzerland, we employ around 40,000 people in 90 countries and generate business volumes of approximately \$10 billion USD.

- Transformers
- Substations & Electrification
- Data Center Substation Electrifications
- Modular and Prefabricated Substations
- HV Switchgear
- AIS, GIS, Hybrid
- Grid Integration Services
- Consulting
- Substation Automations, Protection, Control

" Jacobs is pushing the industry boundaries as a solution provider as well as an employer – focused on sustainability, innovation, and diversity across all areas of our business."



Eduard Pacuku

DC Market Leader, EMEA



www.jacobs.com



DESIGN & ENGINEERING, CONSULTANCY & PROJECT MANAGEMENT

At Jacobs, we're challenging today to reinvent tomorrow by solving the world's most critical problems for thriving cities, resilient environments, mission-critical outcomes, operational advancement, scientific discovery and cutting-edge manufacturing, turning abstract ideas into realities that transform the world for good. With \$14 billion in revenue and a talent force of more than 60,000, Jacobs provides a full spectrum of professional services including consulting, technical, scientific and project delivery for the government and private sector.

End-to-End Services including:

- Site Analysis and Due Diligence
- Master Planning
- Architecture
- Structural and Civil Engineering
- MEP/Fire/Life Safety Engineering
- Telecommunications and Security Design
- Water and Environmental Engineering
- Sustainability and Renewable Energy Services
- Project and Construction Management
- Commissioning

" At Keppel we pride ourselves on being a trusted global company building a sustainable future."

Keppel Data Centres

Gary Watson

Country Manager

www.keppeldatacentres.com



CONSTRUCTION ELECTRICAL & MECHANICAL INSTALLATION

Keppel DC (Keppel Data Centres) is the manager and operator of premier wholesale and colocation data centres across Asia-Pacific and Europe. We offer a comprehensive range of colocation services to leading blue-chip brands, financial institutions and government agencies which demand high availability and minimal downtime to their infrastructure and connectivity.

- Colocation Services
- Build to Suit
- Connectivity Services including Cloud Connect
- Asset Management
- Renewable Energy
- ICT Managed Services
- Sub Sea Cable

"Kirby is a values driven business. Our five core values; people, safety, quality, delivery and value, are at the centre of everything that we do and form the basis of our culture."



Aidan Kerins

Group Business Development Director



www.kirbygroup.com



CONSTRUCTION, ELECTRICAL & MECHANICAL INSTALLATION

Founded in 1964, Kirby is a leading mechanical and electrical engineering contractor with operations in Ireland, the UK and Mainland Europe.

Kirby provides full mechanical and electrical engineering contracting services as well as specialist high voltage (HV) and medium voltage (MV) design and construction services to clients across a number of different sectors including Data Centres, Life Sciences, Energy and Industrial Manufacturing.

- Electrical and Instrumentation
- Mechanical, Pipework and HVAC
- HV/ MV Services
- Commissioning
- Off-Site Manufacturing

" With Kohler's many strands of Emergency Power Backup Systems e.g. generators, UPSs, power conditioning & monitoring equipment, gas and bio-fuel engines, Low Voltage switchgear solutions – remember: 'With the Beige and Black, we've got your back'."



Pat Cregan

Director



www.kohlerpower.com



EMERGENCY POWER MANAGEMENT, UPS SYSTEMS & BATTERIES

Kohler Power is a global force in power solutions since 1920. Kohler is committed to reliable, intelligent products, advanced engineering, and responsive after-sale support. As the largest privately-owned manufacturer in the world, we have 100 years of experience in industrial power and benefit from global R&D, manufacturing, sales, and distribution integration. Inspired by our clients, we develop dedicated solutions for data centers worldwide.

From planning the design and choice of equipment to final testing and commissioning, Kohler offers reliable power systems, precisely designed to customer specifications, great flexibility in manufacturing, extreme rigor during testing, and meticulous precautions during commissioning.

 Power systems, from planning the design and choice of equipment to final testing and commissioning

" Legrand provides reliable, sustainable and scalable data center solutions."



Darren Territt

Regional Sales Director





POWER DISTRIBUTION UPS SYSTEMS IT INFRASTRUCTURE

Legrand Data Center Solutions provides flexible, proven, and scalable data center solutions.

With award-winning solutions from strong data center players like Borri, Minkels, Modulan Power Control Services, Raritan, Server Technology, Starline, Usystems and Zucchini you benefit from optimal uptime of mission-critical operations. Our team of local specialists design and build innovative solutions including enclosures, cooling, power, structured cabling and access management to meet your exact requirements. Over 30 years, thousands of organisations have relied on our expertise, knowing that Legrand Data Center Solutions is a global partner to count on.

- Cast Resin Transformers
- UPS & STS Solutions
- High Power Busbar Distribution Equipment
- Low Voltage Switchgear
- Continuous Access Busway
- Overhead Cable Management
- Aisle Containment
- Inrow and Rear Door Cooling Units
- Server & Network Cabinets
- Intelligent PDUs & Sensors
- KVM & Serial Console



" LPI Group is renowned for providing ultra-highperformance lightning protection, earthing, and surge protection systems in a customer-centric, innovative, and strategic manner."



Alan Doyle

Business Development Manager

m www.lpigroup.com



EARTHING & LIGHTNING PROTECTION SOLUTIONS DESIGN & ENGINEERING CONSTRUCTION PROJECT MANAGEMENT ELECTRICAL & MECHANICAL INSTALLATION

In today's connected world, it's important now more than ever to protect critical information and data. When it comes to lightning protection for data centres, we ensure that key exposure areas to lightning strikes within these facilities, including power supply lines, the core data centre building and data processing and storage units, are protected against the detrimental damages of lightning strikes.

Established in 2011, LPI is one of Europe's leading professional contracting firms specialising in high-performance lightning protection systems, earthing systems and surge protection devices. Our team of experts deliver industry-leading services to data centres across Europe, including the consultancy, design, supply, installation, commissioning and maintenance of our systems.

- Design and Consultancy
- Construction Installation
- Off Site Construction
- Digital Construction/ BIM
- Asset Management
- Maintenance
- Critical Electrical Appliances

" Flexible and Scalable Data Centre Design that optimises your blueprint and mitigates challenges."



Graham Ovenden

BA (Hons) Dip Arch Associate Architect





ARCHITECTURE

Ireland has become a centre of excellence in data centre hosting and MCA is a solutions-driven architectural practice that has thrived in parallel. With a scope of services ranging from due diligence to master planning, from project management to interior design, we have fostered long term partnerships with Ireland's global pioneers of cloud computing and developed a unique MCA approach. The MCA specialist data centre team operates in a design ecosystem that fosters creative problem solving in a culture that champions energy & carbon savings, and real estate optimisation.

- Due diligence and Site analysis
- Master planning
- Interior Design
- BIM
- PSDP
- Project Management
- Shell and Core Design
- Expertise in Local Authority Requirements
- Workplace Strategy
- Onsite Quality Control and Monitoring

"We leverage historical data and invest in industry-leading technology to help our clients build better, faster and smarter."



Anthony Mc Dermott

Director



www.mitchellmcdermott.com



PROJECT MANAGEMENT & COST CONSULTANCY

Mitchell McDermott is an independent, full-service and data-led construction consultancy that empowers ambitious companies to build better. With a relentless focus on quality, efficiency and new ideas, we offer hands-on Quantity Surveying, Project Management, Funder Advisory and Specialist Services to help clients deliver ever more exciting, practical and sustainable spaces - efficiently and on deadline. Founded in 2015 by Paul Mitchell and Anthony McDermott, MMCD has since grown to 60 team members, We recently won the 2021 and 2022 Project Management Firm of the Year award, as well as ranking 1st in Irelands Best Workplaces 2022 (Small firms).

- Quantity Surveying
- Project Management
- Project Monitoring
- Funder Advisory Services
- Technical Due Diligence
- Employers Representative
- Market Intelligence

" Moy provide an energised and enthusiastic service to deliver a bespoke critical roof system uniquely tailored to your project requirements."



www.moymaterials.com



ROOFING, EARTHING & LIGHTNING SOLUTIONS

MOY is a privately owned Irish International business that encompasses five decades of experience delivering flat roof waterproofing systems. Offering FM Approved, IBA and BBA certified flat roof waterproofing systems throughout the EMEA region to the Mission Critical sector, MOY provide specifications tailored to each project design using innovative, long-lasting waterproofing solutions, and pride themselves on delivering excellence throughout the project's delivery, completion, and beyond.

The services offered include specialist technical consultation, CPD presentations, roof surveys, condition reporting, and on-site support throughout the lifecycle of the project. With one eye on the future and a focus on the ever-changing demand of Mission Critical construction projects, MOY continues to innovate and invest in expanding product developments which are focused on sustainability and adding value.

- Tailored Waterproofing Specifications
- Technical Expertise
- Asset Management
- Waterproofing Technical Services
- Roof Systems Design
- Green Roofing
- Lost Habitat Replacement Through Living & Blue Roofs
- Drainage Analysis
- Intelligent Roofing Smart Monitoring Solutions

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"We are proud to be trendsetters in data centre cooling energy efficiency and bringing flexibility to meet our customers varied requirements."

⊘ Munters

David Bourke

Commercial Director



Host In Irel



HVAC



Munters is a global leader in energy-efficient and sustainable air treatment solutions. Using innovative technologies, Munters has been defining the future of air treatment since 1955. Munters currently cools over 1.8GW of rejected heat from data centres around the globe with a portfolio mix of both direct and indirect energy-efficient cooling solutions. Munters' advanced cooling systems provide data centres the desired cooling results using significantly less energy than standard air conditioning.

- Low Energy Sustainable Cooling Systems
- Indirect And Direct Evaporative Cooling Units
- Precision Cooling Units
- Waterless Cooling Units
- Split System For Space Restricted Sites
- Make-Up Air And Humidity Control Systems
- Customised Solutions
- Full-Service Plans
- Turnkey Solutions

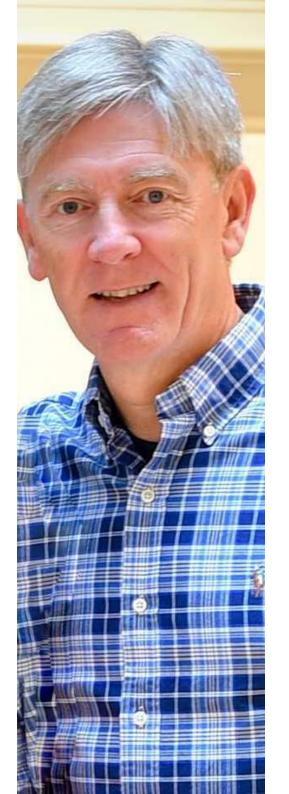
" In a world where connectivity is the difference between success and failure, we won't rest until you have the infrastructure you can completely rely on."



Matt Porter

Managing Director

www.onnecgroup.com



NETWORK CONNECTIVITY



Onnec Ireland Limited, previously known as Kedington, is part of the Onnec Group of Companies, providing cabling, networking and connectivity services for the public and private sector across the globe. With a loyal customer base of multinationals, with relationships spanning 30+ years, our customers benefit from decades of experience and industry-leading standards, deployed at a local level. We are a leading Network Connectivity and Solutions company, with highly experienced designers, project managers and installers, all supported by world-class strategic vendor relationships. We have successfully deployed state-of-theart fibre solutions in some of the world's largest Data Centres. For others, we are the Master Systems Integrator/ specialist contractor for all the intelligent systems within their connected spaces, to deliver enhanced user experiences, build resilience and drive cost efficiencies.

Onnec's end-to-end services give you the cabling and networking infrastructure you can completely rely on and delivers certainty in your connected space.

The connection is everything.

- ICT Network Cabling Infrastructure Systems
- LAN, WAN, Wireless & Network Security Solutions
- Smart Building Systems Integration (MSI)
- Integrated Network Component Supplies

DATA CENTRE OWNER & OPERATOR

Pure specialises in designing, building and operating hyperscale data centres, anywhere in the world, to the highest industry standards. Our goal is to be an adjunct to our customer's internal teams, working with them to seamlessly integrate with their internal operations. In achieving our objectives we are driven by our core values of availability, service and integrity. Pure is backed by world-class financial institutions and managed by leaders each with decades of specialist industry experience, focussed on delivering 100% availability, wherever we operate, every day, throughout the life of your contract.

• Design, Build, Operation of Hyperscale DCs

PURE DC

Howard Pheby

Business Development Director





" Our products provide data centre operators with smart, scalable, and sustainable critical power protection that reduces their risk of damaging downtime."



Leo Craig Managing Director



UPS SYSTEMS & BATTERIES



Riello UPS Ireland Ltd is a leader in the manufacture of uninterruptible power supplies (UPS) and standby power systems from 400VA to 6.4MVA. We enable reliable power for a sustainable world by offering products that combine engineering excellence and quality performance with exceptional efficiency.

Our award-winning range incorporates 23 solutions powering the smallest desktop PCs through to the latest data centre supercomputers. Riello UPS Ireland Ltd also provides comprehensive installation, servicing, and maintenance support, unrivalled sales and technical advice, and a 5 year warranty as standard on all UPS up to and including 3kVA.

Riello UPS Ireland Ltd is part of the Riello Elettronica group, which has subsidiaries in 85 countries and is the second-largest UPS manufacturer in Europe.

- Uninterruptible Power Supplies (UPS)
- UPS Sales: Cuper-fast dispatch to data centres across Ireland
- UPS Service & Maintenance: Complete end-to-end service of technical support
- UPS Monitoring
- Energy Storage Systems

" Rittal prides itself on being the best provider of industrial enclosure systems including power distribution, climate control, IT infrastructure and software for the Data Centre market."



Wayne Moody

Sales Director





POWER DISTRIBUTION IT INFRASTRUCTURE CLIMATE CONTROL

Rittal. Power and Vision!

Since its foundation in 1961, Rittal has continuously evolved into the world's leading systems provider for enclosures, power distribution, climate control, IT infrastructure and software & services.

Today, "Rittal – The System." offers you a perfectly coordinated system platform. It unites innovative productions, pioneering engineering solutions and global service to accommodate the most diverse requirements.

All from a single source, all in top quality.

- Enclosures
- Power Distribution
- Climate
- IT Infrastructure and Software & Services

"Working together with our trusted AE partner network across the EMEA Region, we provide comprehensive fullservice dta centre design solutions for ambitious clients driving cuttingedge innovation in digital backbone connectivity."



Ronan Smith

Executive Director





ARCHITECTURE HIGH TECH DESIGN CONSULTANCY

RKD is an international design consultant for high-tech projects. Our award-winning team comprises architectural and engineering professionals with offices in Ireland, Belgium, Italy, Poland and Spain.

We have a staff resource of 220+ people and the proven ability to deliver large value projects. Leveraging expert multidisciplinary experience we provide end-to-end project solutions for high tech, mission critical, pharma / life sciences,, and Food & Beverage clients across the EMEA region.

- Mission Critical Design
- Integrated Architectural and Engineering (A/E) Design
- Integrated Design Management
- Brief Development
- Site Selection & Due Diligence
- Masterplanning
- Permitting and Regulatory Compliance
- Sustainability Accreditation
- Certified BIM Leadership
- Design Localisation
- On-Site Construction Support

" RWL are delighted to be part of the Host in Ireland community in 2022. We recognise the value of partnership with collaboration and HII provides the perfect platform to utilise this as we continue to evolve with the DC industry."



Robert Walsh

Managing Director



www.rwlas.com



CABLING & NETWORK PRODUCTS

RWL Advanced Solutions is Europe's leading independent distributor for Data Cabling and Network products. With locations in Dublin, London, and Amsterdam, we have a comprehensive reach across Europe and beyond. We are strategically partnered with leading Global brands as we distribute Turnkey solutions to installers across many different theatres.

Our mission is to be your digital partner for Sustainability and Efficiency. We drive digital transformation by integrating world-leading process and energy technologies to realise the full efficiency and sustainability opportunities for your business.

In 2023 we endeavour to continue to grow our footprint, partnerships, and customer base around Europe.

- Structured Cabling
- Cable Containment
- Testing & Certification
- Training
- Copper & Fibre Data Centre Solutions

" As an impact company, our mission is to decarbonise the digital infrastructure sector, and build sustainable data centres of the future."

Schneider Gelectric

Chris Collins

Country President Ireland / Major Pursuits Leader UK&I Zone



DESIGN & ENGINEERING HVAC, RACK SYSTEMS UPS SYSTEMS & BATTERIES POWER DISTRIBUTION, MANAGEMENT & METERING ASSET MANAGEMENT & MONITORING

Schneider's purpose is to empower all to make the most of our energy and resources, bridging progress and sustainability for all. We call this Life Is On. Our mission is to be your digital partner for Sustainability and Efficiency. We drive digital transformation by integrating world-leading process and energy technologies, end-point to cloud connecting products, controls, software and services, across the entire lifecycle, enabling integrated company management, for homes, buildings, data centres, infrastructure and industries.

We are the most local of global companies. We are advocates of open standards and partnership ecosystems passionate about our shared Meaningful Purpose, Inclusive and Empowered values.

- Plan & Design, Build: Modular Data Centres
- Equip: Micro Data Centres, Row Data Centres, Modular Data centres, Pod Data centres, UPS, Racks and Accessories, Power Distribution – Rack Power Distribution and Row 3 Phase Power Distribution, Data Centre Management Software and services, Security and Environmental Monitoring, Cooling solutions, MV, LV
- Operate: Managing and Monitoring the customer's colocation, data centre, and Distributed IT sites in the cloud or on-premises through our software and services

" A World Leader in Security Technology, Services & Expertise."

Securitas Technology

Shane Clarke

Director Of Design Engineering



www.securitastechnology.com



SECURITY AND FIRE PROTECTION SYSTEMS

Securitas Technology, part of Securitas, is a world-leading provider of integrated security solutions that protect, connect and optimize organizations of all types and sizes. Our 13,000+ colleagues in 40 countries are focused daily on our purpose to help make your world a safer place and our commitment to deliver an unparalleled client experience.

Our Global Clients Program helps organizations integrate and maintain a consistent security experience across their entire enterprise. With coverage across six continents, we can support you all over the globe.

Expertise in data center space for design and delivery of complex integration projects. Knowledgeable in utilizing the most advanced security technology including cloud, artificial intelligence, analytics, biometrics, wireless/Bluetooth.

Global product evaluation committee, continually accessing solutions across all spectrums to cover specific client needs. Powered by a trusted and certified field network team, together with the latest intelligent security technology, we keep clients ahead of risks so they can focus on what really matters

- Security Design & Risk
- Life Safety and Fire Detection System Design
- Supply, Installation & Commissioning of the below
- Access Control
- CCTV Video Surveillance
- Intruder Alarm Systems
- Fire Detection
- Life Safety Systems
- Time & Attendance
- Monitored Security

" Our operational experts know the ins and outs of the data centre and will work with you on any issue, day or night."



Mark Cullen

Managing Director



www.sensorifm.com



FACILITY MANAGEMENT ELECTRICAL & MECHANICAL INSTALLATION

100% Irish-owned and part of the Sisk Group, our critical facilities management team assist businesses managing their data centre facility, assuring ongoing uptime and infrastructure dependability.

We work in live environments supporting the design, construction, operation, and maintenance of new and retrofitted data centres throughout Europe. Working closely with our clients, develop the most effective practices for running your data centre, resulting in substantial savings over the short and long term. Our ability to maximise the use of existing infrastructure space results in increased energy efficiency and sustained power output.

Our people go beyond the fundamentals to maximise the efficiency and performance of your data centre. We adhere to international standards, including ISO 9001, ISO 14001, ISO 45001, ISO 50001, and Grade A Safe-T Cert.

- Integrated Facilities Management
- Planned Preventative Maintenance
- Reactive Maintenance and Emergency Call Outs
- Security Systems and Technology
- Building Fabric Maintenance
- Intelligent Building Solutions
- Mechanical and Electrical Works
- Renewable Energy Works
- Construction Project Turnkey Delivery

"We are the only wholly Irish owned independent fire and security business working in the data centre sector and the first to be certified to ISO27001."



Ivan Nolan

Managing Director

www.sharpgroup.ie



SECURITY AND FIRE PROTECTION SYSTEMS CONSULTANCY FACILITY SERVICES

Founded in 1999, Sharp Group Fire & Security Services is the leading supplier and installer of electronic security and fire systems in Ireland. Since the company's inception it has carried out major projects for many leading organisations across corporate, commercial and public sectors, and blue-chip companies.

Sharp Group is independently audited to the highest international standards and is the first Irish-owned fire and security company to obtain ISO27001 and ISO37001 certification. Sharp Group have become synonymous with high-end managed services from concept design, installation and commissioning, through to maintenance, manned staff, mobile guarding and proactive monitoring.

- Fire Prevention and Protection Services
- Security Products and Services
- Concept Design
- Installation and Commissioning
- Manned Security Services
- Mobile Guarding
- Proactive Monitoring
- Maintenance and Service



"We bring together the digital and physical worlds to benefit customers and society. We are proud that our technology supports delivering resilient, efficient and sustainable datacentres."

SIEMENS

Derek Kelly

Regional Account Manager



<u>www.siemens.com</u>



POWER MANAGEMENT POWER DISTRIBUTION & SECURITY SYSTEMS

Since 1925, Siemens has empowered customers in Ireland to transform their businesses, so that they can impact the world. As a focused technology company, we create products and the open digital business platform, Xcelerator, that empowers our customers to positively transform the data centre industry that forms the backbone of our economy. From more resilient power systems, smarter buildings and grids to combining the real and the digital worlds, Siemens delivers technology with purpose, adding real value for datacentre customers and transforming the everyday for billions of people.

Siemens employs more than 700 people in Ireland and has facilities in Dublin, Shannon, and Letterkenny.

- Time-saving E HOUSE Kiosks & Skid design, build, install
- Sustainable Clean Air Power Distribution solutions (LV, MV, busbar, PDU)
- Low Voltage products: ACB/MCCB/MCB
- Power Quality products and solutions
- Digital Twin Protection, Control and Communication design
- Intelligent building technology (Enlighted, Brightly, Comfy)
- Building CCTV, Fire Alarm and Access Control products
- Commissioning and Service Support

" At SLS we are proud to deliver data services sustainably, in alignment with our purpose: create a world without waste to preserve our planet."



Jelle Slenters EMEA Head of Sales

www.simslifecycle.com



RECYCLING & DESMANTLING

Sims Lifecycle Services (SLS) provides solutions to extend the life of data centre and IT equipment, realizing the value in end-of-life data centre assets, components and materials. SLS works with enterprises and major cloud providers to deliver decommissioning of corporate IT assets and data center equipment. IT asset disposition (ITAD) and electronics recycling services offered at SLS support the evolution of the cloud and electronics industry towards circularity.

SLS clients benefit from data security, maximum IT value recovery, global compliance and sustainable IT use. As a responsible corporate citizen, and in alignment with the United Nations Sustainable Development Goals, we continuously seek new ways to contribute to the circular economy.

- Decommissioning
- Data destruction
- Resale
- Redeployment
- e-waste Recycling
- On-site technical services

"Solar Turbines primary power generation solutions will support data centres growth wherever primary power is needed."

Solar Turbines

A Caterpillar Company

Toby Boys

Sales Manager Powergeneration



www.solarturbines.com



POWER SYSTEM & POWER DISTRIBUTION

Solar Turbines started as an aircraft company in 1927. The company grew through several wars and the Great Depression. Solar's growth led the company to develop a wide range of innovative products. Today Solar is a key player in the 1 to 39 megawatt (MW) segment of the global gas turbine market, making it a world-class energy solutions provider. Building on the accomplishments below, Solar Turbines continues to power the future.

- Gas Turbine Driven Engineering Solutions for Industries
- Gas Turbine Generator Sets
- Modular Power Generation Units
- Mobile Generator Sets

" At STO Mission Critical we deliver on our customers' requirements, through partnership, engagement, trust and ability. As our customers require redundancy and reliance 24/7 in their business we operate in a similar mindset to ensure a best in class service is delivered and executed."



Dermot Brady

Project Director Mission Critical



www.structuretone.com



CONSTRUCTION DESIGN & ENGINEERING

STO Mission Critical is a global team of experts who bring together the resources of the STO Building Group family of companies, providing clients with the benefit of our collective experience, people, relationships, and expertise. STO Mission Critical experts have the advantage of being able to bring clients the support of a global network while maintaining the familiarity of their local general contractor or construction management provider. Through this platform, we create the consistent experience in approach, delivery, and service needed to design, build, and commission critical facilities in any location across the globe.

- Integrated Turn-Key Project Delivery
- D&B, CM & MC Project Delivery from Inception to Completion
- Strategic Development Planning and Integration
- New Build Green & Brown Field Data Centres and Substations
- Critical Upgrades and Technical Fit-outs
- Dedicated Commissioning Staff
- Construction and Engineering Services provided by Direct Staff
- IST Management and Delivery
- Managed Design and Delivery Services Inc BIM
- Project Master Planning

"We must all work together, so that we challenge ourselves and our Clients to deliver the most sustainable systems and buildings. We have a huge influence on shaping the future and a collective responsibility to become carbon neutral."



David Phelan

Business Development Director





ELECTRICAL & MECHANICAL INSTALLATION SERVICES CONSTRUCTION

Suir Engineering has nearly 40 years of mechanical, electrical and instrumentation (M,E&I) expertise, with offices in Waterford, Dublin, Sweden, Denmark and Germany and a direct workforce of more than 1,300 people. The business carries out over €300m in project work annually.

Suir Engineering is a market leader in the provision of electrical & mechanical contracting services to the Data Centre sector across Europe. Suir Engineering's experienced and internationally mobile 450 strong Data Centre team have been responsible for the construction of both hyperscale and colocation data centres throughout the continent over the past 20 years. Suir Engineering offer Traditional M&E contracting, Design & Build and Turnkey, EPC contract solutions to its Data Centre clients – continuous services and upgrade works are also part of the scope offering.

- Design, build & Commissioning LV, MV & HV Data Centre Mission Critical M&E Plant & Equipment
- Replacement of legacy and inefficient M&E systems
- Contract Solutions: Traditional M&E Contracting, Design & Build, EPC and Operate
- Project Management
- Pre-Commission and Commissioning



" With our focus on assets and services such as facility management and critical construction, T5 is a full lifecycle partner for the most discerning data center occupier. We help keep our customers 'Forever On!'."



Dave Ryan

Business Capture Leader Europe





DATA CENTRE OWNER & OPERATOR, FACILITY SERVICES

T5 Data Centers (T5) is a leading data center owner and operator, committed to delivering scalable mission-critical facilities, facility management and construction services that provide a "Forever On" environment. T5 Data Centers provides life-cycle data centre services and purpose-built data center facilities to organisations across North America and Europe featuring robust design, redundant and reliable power and telecommunications, and 24-hour staff to support mission-critical computing applications. Visit t5datacenters.com or call (888) 239-7133 or +353 87-2155913 to learn more.

- Leasing and Development: Ready-Now Turnkey, Purpose-Built Powered Shells, Custom Build-to-Suit
- Facility Management: Turnkey Facility Management & Operations, Award-Winning Enterprise and Hyperscale FM&O Services, Complete Remote Hands & Data Hall Support, Staff Augmentation, Training, and Procedures
- Construction Services: Sustainable Design & Construction Practices, Mission Critical Facility Upgrades & Expansions, Turnkey Design, Commission & Construction, Equipment & Asset Procurement, Renewable Energy & Solar Array Installations

"We are dedicated to manufacturing innovative floor-to-ceiling data centre solutions and delivering engineering led services that aim to improve the overall energy efficiency and performance operations of data centres."



Shane McMahon

General Manager Tate Europe





AIRFLOW DESIGN & SOLUTIONS

For over 55 years, Tate has been an industry leading global manufacturer of data centre solutions. We work collaboratively with our data centre clients to provide structural ceilings, containment systems, airflow grills and security cages that are reliable, innovative, and high performing. Our team of professional and highly qualified technical engineers are on hand to support to our clients with their specific data centre project requirements.

We have a long-term commitment to delivering a sustainable agenda as part of Kingspan Group's 10-year Planet Passionate programme, that addresses climate change, circularity and protection of our natural world. We believe these can only be met through true collaboration and partnership and are delighted that together our initiatives have been recognised by global environmental impact non-profit CDP since 2016, for driving climate change. As a member of RE100, together with Kingspan Group, we are actively committed to 100% renewable electricity and have joined as a key global partner with the World's GBC's.

- Manufacturers of innovative and flexible structural ceilings, containment, airflow grills and security caging
- Engineering & BIM design experts
- Agile project execution for smooth and on time project delivery
- Intuitive floor-to-ceiling products for speedy installation
- Advancing net zero project through our 10-year Planet Passionate programm



"We at Teckel-Group are dedicated to offering the highest standard of services to achieve amazing results and client satisfaction."



Joe Corey

Hyper Scale Data Center Commissioning Manager / Electrical Commissioning Lead Engineer



www.teckel-group.com



PROJECT DELIVERY COMMISSIONING MANAGEMENT

Formed in December 2021 by Brendan O'Mahoney, Darren O'Mahoney and Joseph Corey, Teckel-Group is an Irish based company working with numerous high scale Data Centers across Europe.

The core idea behind forming Teckel Group is to bring together like-minded ambitious individuals and create teams who can deliver specialist projects.

Teckel-Group are a process driven company and believe that improvement can always be achieved by facilitating and consulting for our clients.

Focused on Data Centre Project Delivery:

- QA/QC Management
- Commissioning Management
- Project Management

" As the trend continues for data centres to use renewable power, we are here as a trusted partner advising customers on grid support and energy efficiency strategies. We work very closely with our clients throughout their lifecycles and geographies. "



Alex Brew

Regional Director, Northern Europe



CONSTRUCTION LIGHTNING SOLUTIONS POWER SYSTEMS, DISTRIBUTION, MANAGEMENT & METERING HVAC, RACKS SYSTEMS UPS SYSTEMS & BATTERIES

As Architects of Continuity, we collaborate with our global customers to envision and build future-ready infrastructures. With decades of history operating in Ireland as a long-standing, valued partner to the major technology giants based there, we bring together a broad offering of power, cooling, IT and edge infrastructure and service solutions. Locally, we have over 400 MW of UPS and over 50 MW of cooling installed, and more than 50 engineers ready to support customers. Now strengthened with an enhanced power portfolio integrating E+I Engineering, a leading provider of electrical switchgear, modular power solutions and power distribution systems.

- Electrical Switchgear
- DC Power Systems
- Power Distribution Systems
- Prefabricated Modular Data Centres
- Racks and Integrated Solutions
- Commissioning, Service, Maintenance and Remote Monitoring
- Thermal Management / Critical Cooling

"Whatever your specific data centre environment, Wesco Anixter offers solutions to reduce labour costs, lower injury risks and speed up every phase of construction and operations."



Marc Fitzachary

Country Manager Ireland

www.wesco.com/uk

in



POWER DISTRIBUTION, RACKS, CABLING & SECURITY SYSTEMS

Wesco Anixter represents the international go-to-market brand of Wesco <u>www.wesco.com</u> and brings to life the company's mission to build, connect, power and protect the world to its customers and supplier partners in the regions of CALA, EMEA and APAC. Headquartered in Pittsburgh, Pennsylvania, USA, WESCO International, Inc. is a FORTUNE 500[®] company with more than \$21 billion in annual sales and a leading provider of B2B distribution, logistics services and supply chain solutions, as well as a best-inclass product and services portfolio of Electrical and Electronic Solutions, Communications and Security Solutions, and Utility and Broadband Solutions.

Wesco Anixter provides innovative solutions to meet customer needs across commercial and industrial businesses, contractors, government agencies, institutions, telecommunications providers, and utilities in more than 50 countries around the world.

- Copper and Fibre
- Data Cabling
- Infrastructure
- Cabinets, Racks, Enclosures and Containment
- Power Distribution
- Video Surveillance
- Access Control
- Electrical Infrastructure
- Audio Visual
- Wireless Lighting
- EV Charging
- Solar
- Safety and Janitorial

" Deploying capital on a global stage, we have multiple developments under full control, offering clients maximum portfolio optionality and speed to market."

yendr

Pete Jones Chief Development Officer



DATA CENTRE OWNER & OPERATOR

Yondr is a global developer, owner, operator and service provider of data centers. We deliver complex data center capacity needs for the world's largest tech companies. A supply-led business, we deploy capital on a global stage to provide clients maximum portfolio optionality. We de-risk and enable clients access to thousands of high quality megawatts, with scalable supply in multiple markets, simultaneously.

- Regional Strategy
- Land Acquisition
- Secure Power, Planning and Permitting
- Sustainability Planning and Solutions
- Design
- Construction
- Operations
- GIS



ABOUT HOST IN IRELAND

Host in Ireland is a community of global and Irish companies with a collective interest in raising awareness of the unique role Ireland plays in digital infrastructure around the world. With more than 50 partners across the digital infrastructure ecosystem, Host in Ireland operates under a spirit of success through collaboration. Market competitors come together with an action-oriented mentality to promote Ireland as a trusted centre of data excellence.

For more information about Host in Ireland, visit <u>www.hostinireland.com</u>.

- in www.linkedin.com/company/hostinireland
- y www.twitter.com/hostinireland
- <u>www.facebook.com/HostInIreland/</u>

