Introduction

This report was prepared by Data Center Frontier, in conjunction with datacenterHawk.

About Data Center Frontier

http://datacenterfrontier.com

Data Center Frontier charts the future of data centers and cloud computing. We write about what’s next for the internet, and the innovations that will take us there. The data center is our prism. We tell the story of the digital economy through the facilities that power the cloud and the people who build them. In writing about data centers and thought leaders, we explain the importance of how and where these facilities are built, how they are powered, and their impact on the Internet and the communities around them. Data Center Frontier is edited by Rich Miller, the data center industry’s most experienced journalist. For more than 15 years, Rich has profiled the key role played by data centers in the Internet revolution.

About datacenterHawk

http://www.datacenterhawk.com

datacenterHawk is a convenient one-stop-shop for IT professionals, consultants, data center operators and investors to find data center and cloud solutions. Our subscription-based service makes the complex process of searching and analyzing colocation and cloud service providers simple and faster than ever. Our online tools help users compare potential data center solutions using real-time capacity information, financial data, and market research; then present the findings in a sharp, easy to understand report. For non-subscribers, datacenterHawk delivers hard to find information on the top Internet exchanges, cloud computing providers, carrier hotels, and colocation facilities in North America on a per-report basis. With a credit card number, IT professionals can use datacenterHawk to reduce the time it takes to find data center market information down from hours to seconds.
Northern Virginia (NoVa) is the epicenter of digital infrastructure in North America, and the favorite data center location for hyperscale operators seeking capacity to power cloud computing platforms and social networks.

The region is one of biggest success stories of the Internet economy, with the rapid growth of the data center industry transforming real estate markets and the local tax base.

The NoVa data center market is spread across a number of towns in Loudoun, Prince William and Fairfax counties, and shows signs of expanding into adjacent counties. At the heart of the region’s geography and success is Ashburn, which has become known as Data Center Alley for its concentration of mission-critical facilities.

Ashburn sits atop the world’s densest intersection of fiber networks, making it an ideal location to store and distribute data. It is unique in its connectivity, and its data centers are laying the physical foundation of the digital economy.

NoVa continues to be largest market for data center space in the U.S. and is home to 11.9 million square feet (ft²) of commissioned multi-tenant data center space, representing 1,920 megawatts (MW) of commissioned power, according to market research from datacenterHawk. Demand for space is very strong, as reflected in the vacancy rate of just 1.28 percent in the region.

NoVa has seen unprecedented levels of data center leasing, record valuations for land in Data Center Alley, and a surge in land banking as developers seek to lock down space for future expansion in this region, which has strategic importance for enterprise customers, as well as hyperscale players. NoVa continues to see demand for traditional colocation space for enterprises, content companies, IT integrators and government agencies.

The latest numbers on market growth are extraordinary even by historical standards. Here are some data points:

- According to datacenterHawk, 237MW of commissioned data center capacity was either absorbed or pre-leased in NoVa in the fourth quarter of 2021, easily exceeding the industry record of 115MW for an entire year—which was established in 2017 in NoVa.

- The volume of data center capacity in the planning phase in NoVa has reached 4,022MW—that’s over 4 gigawatts (GW). This is partially driven by new players entering the market, but also includes major expansions by experienced players.
The Expanding NoVA Market

NoVa is the world’s largest data center market. This extremely mature and well-connected area traces its roots to the U.S. Government’s experiments in wide area fiber optic networking in the late 1960s. The low-latency connections to the national fiber network backbone along with a relatively business-friendly environment make NoVa the top market for data centers serving the area’s biggest public and private enterprises.

Over 70 firms with annual revenue over $500 million are headquartered in Virginia with eight of the nineteen of the Fortune 500 companies in Virginia headquartered in the NoVa area.

NoVa is the home of the cloud for a number of following reasons:

1. Competitive Colocation/Cloud Environment - The NoVa market has the largest presence of colocation and cloud providers in the U.S., creating a very competitive environment
2. Strategic Location - The NoVa market provides a strategic, cost-effective market for companies needing their data center in the northeastern U.S.
3. Relatively Free of Natural Disasters - Other than occasional high winds and rain from hurricane remnants, the NoVa market is typically very safe
4. Reasonable Power Cost - NoVa’s power costs are competitive among major colocation markets and is reasonable considering the total cost of occupancy for long-term requirements
5. Business Climate - Despite some economic challenges in Virginia over the past few years, the area’s businesses continue to grow, creating data center requirements for the market

The Virginian economy is diverse, with both a strong manufacturing base (producing everything from wood flooring to rocket engines) and information services sector. Over 70 firms with annual revenue over $500 million are headquartered in Virginia with eight of the nineteen of the Fortune 500 companies in Virginia headquartered in the NoVa area. Since 2018, nearly $2 billion was spent on land purchases for data center development in NoVa.

While the downtown Washington, DC area has several smaller data centers, the bulk of data center investment occurs outside of the downtown area. Concentrations of colocation, cloud, and enterprise data centers are located in several cities to the northwest corner of the market, including Ashburn, Sterling, and Reston, VA.

The Ashburn area (a suburb north of Dulles Airport so dense it is commonly referred to as Data Center Alley) is dominated by a number of large data center providers. It is home to multiple large campuses owned and operated by Digital Realty, which is the largest provider in the market and positioned for long-term growth in the region. Digital Realty has developed two massive data center campuses, and in 2017 it acquired a third large campus with its acquisition of DuPont Fabros Technology.

Equinix is also a key player in the NoVa data center ecosystem, operating a key regional connectivity hub on its campus in Data Center Alley. Equinix operates 14 data centers in the area, and has secured land in the area to continue to expand.

Approximately one mile to the southeast is Sterling, an area with a growing number of data center providers. Digital Realty, CyrusOne, Cyxtera, and Stack Infrastructure are well positioned to be competitive in this area for the immediate future.

Reston continues to grow as well, with significant investments from CoreSite, Digital Realty, and Equinix.

The strong demand for data center space in NoVa, along with the dwindling supply of development parcels, has led to the emergence of several regional sub-markets beyond the core of Data Center Alley in Ashburn. These include:

- The Dulles Cloud Corridor - The area surrounding Dulles Airport is the new frontier for data center development, home to campuses for Amazon Web Services, Google, and Microsoft in Arcola. Digital Realty plans its largest campus here, and AWS has been aggressively acquiring sites around all sides of Dulles Airport.

- The Leesburg Cluster - A Google data center is the largest facility here, but it has company in a Compass Datacenters campus. Microsoft and TA Realty plan large projects in the area.
Prince William County - The Manassas area is becoming a focal point for developers seeking large properties for long-term growth. AWS operates multiple campuses in the region, and CloudHQ, Iron Mountain, QTS, STACK Infrastructure all have campuses. Corscale and Yondr Group are new entries with plans for large campuses near Manassas, while a group of homeowners have banded together to market the Prince William Digital Gateway, a controversial data center district that could support up to 21 million square feet of new data center development.

While government agency requirements have increased the data center demand in NoVa, the majority of the market is made up of other industries finding the market attractive. Aerospace, financial, managed hosting, technology, and telecommunications companies have all staked claims NoVa’s data centers. Colocation requirements in the NoVa market are typically larger than most markets. This is due to the nature of the requirements, as well as the availability and competitive pricing in the market.

Background and History

Why is Ashburn, which lies about 30 miles west of Washington in Loudoun County, such an important site? It was home to MAE-East, the Internet’s first major interconnection point. As a startup, Equinix built its first data center in Ashburn in 1998, providing a carrier-neutral facility where companies’ networks could tap into Internet backbones.

The Equinix campus quickly become the web’s busiest meeting place, creating a powerful network effect in which each new connection adds to the value of its digital ecosystem. As the primary Internet on-ramp, the Equinix campus in Ashburn has become the geographic focus of activity in NoVa, with new data center projects springing up on adjacent land.

Proximity to Equinix continues to shape the market for data center real estate in Loudoun County. In recent years, data center developers and service providers have bought up most of the parcels of open land near the main Equinix campus, providing runway for future capacity in this high-growth market.

Loudoun County has been recognized for its support of the data center industry, coordinating available land and working closely with applicants on zoning and streamlining approvals and fees. Prince William County has developed similar services for a 10,000-acre data center opportunity zone.

Data center projects have been welcomed in NoVa due to their positive impact on the economy, which was documented in a 2021 study from Mangum Economics.

Highlights of the research’s findings include:

- In 2021, the data center industry in Virginia provided approximately 5,550 operational jobs and almost 10,000 construction and manufacturing jobs.
- For every job inside a Virginia data center, an additional 4.1 additional jobs that are supported in the rest of the Virginia economy, with 45,460 supported jobs in 2021.
- Data centers generate significant tax revenue for local governments. Data centers were directly and indirectly responsible for generating $174 million in state revenue and $1 billion local tax revenue in Virginia.
- Without data centers and the way in which Virginia subsidizes local education budgets, the Commonwealth would have had to reallocate $90.5 million in state education funding away from other Virginia localities to provide $73 million in additional funding to Loudoun County, and $17.5 million to Prince William County.
- Virginia’s data center tax incentive programs continue to attract investors and demonstrate that its business climate is welcoming to the high-tech industry.

Data centers continue to be a major driver of investment in Virginia. According to the Virginia Economic Development Partnership (VEDP), in 2021, 62 percent ($6.8 billion) of all the new investment was generated from new and expanding data centers. In 2021, the data center industry supported over 45,000 jobs, producing $3.6 billion in labor income, and created $15.3 billion in total economic output across the Commonwealth.

NoVa has the largest data center market in the world with the region’s total data center capacity more than doubling from 2018 to 2021. As of last year, the data center inventory in NoVa exceeded that of the next five largest markets in total (Chicago, Dallas-Fort Worth, Silicon Valley, New York/Tri-State Area and Phoenix), with an annual compound rate of growth of 25 percent from 2014-2021.
Key NoVa Market Updates

Development in Loudoun County Expands to Razing Sites

The explosive demand witnessed in NoVa is shifting the market dynamic and requiring some developers to take a new approach to development. Between 2018-2020, most of the 20+ acre sites in Ashburn and Sterling were acquired by new market entrants and existing providers land banking to secure a location for future growth. However, data center demand specifically in Ashburn and Sterling remains constant and data center users continue to want to locate there. As a result, most site acquisitions toward the end of 2021 were for parcels less than 10 acres, providing room for only two facilities at the most. To account for this, data centers are designed to span multiple stories and offer higher power density.

Some land purchases included existing buildings on the property, which will be torn down to construct new data centers. While demolition to construct multi-story data centers on small parcels is a common strategy in Northern California, it’s quickly becoming a necessary approach for development in Loudoun County. Examples of this approach include projects by American Real Estate Partners, which will redevelop the former AOL headquarters as a data center campus, Cologix (which will knock down a former church site), and Digital Realty.

The Largest Concentration of Data Centers in the World

One advantage for NoVa’s technology sector when it comes to scalable, impactful work is the region’s proximity to Washington DC, the epicenter of public and private sector collaboration. Annually, more federal procurement awards go to companies in Fairfax County—NoVa’s largest county and the business heart of the national capital region—than any other county or city in the U.S.

As the world’s largest buyer of goods and services, the U.S. Federal Government and its various agencies provide a robust and steady demand for tech systems and products (which is also one of the reasons why NoVa’s economy remains exceptionally stable). NoVa’s position in the backyard of the nation’s capital is also what draws many international firms. Fairfax County alone is home to over 430 foreign companies representing 49 countries, and nearly one in three residents were born outside of the U.S.

Notable Developments in NoVa, 4Q 2021

- Digital Realty will begin developing its 447-acre site known as Digital Dulles in Sterling, VA
- STACK Infrastructure is planning a 216MW campus in Ashburn on Shellhorn site
- A CloudHQ affiliate gained approvals for a 4 million ft² data center campus off Shellhorn Drive
- Corscale is planning hyperscale campuses in Sterling and Manassas
- AREP and Harrison Street partnering to develop Broderick Drive data center campus on former AOL campus
- DataBank is under construction with its second Ashburn data center
- AREP and Harrison Street commence Beaumeade Circle shell development
- BlackChamber Group buys a site in Sterling for data center development
- Skybox is partnering with Prologis for 500k ft² Dulles data center

There are the giants of defense and aerospace headquartered in NoVa, like General Dynamics and Northrop Grumman, which recently won a $187 million NASA contract to design living quarters for Lunar Gateway space station, a crucial step in establishing sustainable human presence on the moon.

The NoVa startup community has a strong track record of making an impact too, with companies like Aireon, a tech startup providing the first global air traffic surveillance system to the aviation industry; and HawkEye 360, a radio frequency analytics firm looking to change the world with its satellites that deliver precise mapping of radio frequency emissions, a brand-new data layer never previously available commercially.
Northern Virginia Data Center Market

Trends in Demand

NoVa is the home of thehyperscalers, with the world’s largest concentration of cloud computing infrastructure. As the cloud computing arms race accelerates, the battle will be waged with data centers. The leading players are moving quickly to amass capacity for the clouds to come, resulting in huge deals for data center space under development.

The region has long been a strategic priority for Amazon Web Services, Facebook, and Microsoft, and is now becoming a focus of expansion for Google, Oracle, Salesforce, and Chinese cloud providers, as well as data-driven companies like Box, Dropbox, LinkedIn, and Uber.

This demand has redefined the scale of data center leasing. Prior to 2016, it was rare to see a wholesale data center lease exceeding 10MW of capacity. In 2016 a handful of tenants began seeking deals of 15 to 35MW.

Over the past several years, CloudHQ and Digital Realty have each built 96MW data centers in Data Center Alley, while Aligned’s newest data center tips the scales at 120MW.

As global players seek flexibility on timing of cloud availability zones across their footprint, some providers are offering the option of shifting leased capacity between markets.

Campuses are growing larger as well. Yondr Group intends to build 500MWs across two sites in Loudoun and Prince William Counties, while Digital Realty’s future Digital Dulles campus near the airport will support at least 7.4 million ft² of data centers.

Another facet of some recent deal structures is capacity portability for tenants whose relationship with a provider spans multiple geographic markets. As global players seek flexibility on timing of cloud availability zones across their footprint, some providers are offering the option of shifting leased capacity between markets. For some providers, capacity in the most strategic markets—especially Ashburn, Chicago and Santa Clara—can serve as incentives to craft larger deals and relationships.

Service providers say that with the rise of distributed computing, clients are increasingly willing to look beyond the traditional Uptime Institute tier-based model.

These trends in deal structure reflect the growing sophistication of data center users, as well as improved collaboration between tenants and landlords, who are working more closely together on matching space to needs.

Another area in which requirements have evolved is data center power design and the options for power delivery to the data hall. Service providers say that with the rise of distributed computing, clients are increasingly willing to look beyond the traditional Uptime Institute tier-based model. The traditional 2N power redundancy is yielding to N+1, or even N for some applications.

Here’s an overview of known significant transactions and demand trends in NoVa in 2020 and 2021:

▶ **American Real Estate Partners**
American Real Estate Partners acquired a parcel of land on Beaumeade Circle where they intend to construct a 265,000 ft² powered shell data center building. The parcel, acquired in 1Q 2021, was previously owned by Chirisa Capital, which intended to execute a similar project.

▶ **Aligned Data Centers**
In 1Q 2020, Aligned began construction on the second building at their Ashburn campus, with the first phase coming online in 2021. A portion of the data center’s total 60MW of power (expandable to 120MW) was pre-leased.

▶ **DataBank**
In 4Q 2021, DataBank has announced they have started construction on a 200,000 ft² data center which will be located adjacent to their current location in Ashburn. The initial build will produce 4MW of capacity when it comes online in Q1 2023, with the ability to scale up to 40MW of capacity fully built out.

▶ **EdgeCore**
In 4Q 2020, EdgeCore secured a pre-lease for their entire campus, prompting the company to seek out additional site acquisition opportunities.
Equinix
In 4Q 2020, Equinix opened their DC21 data center on land acquired in 1Q 2017 off Beaumeade Circle. DC21 will offer approximately 15MW across space for 3,200 cabinets. The first phase included 3MW of commissioned power.

Iron Mountain
In 2Q 2021, Iron Mountain purchased an 18-acre parcel adjacent to their current land, giving them room to expand the existing campus to over 100MW.

NTT
NTT operates a large campus at the Gigabit Plaza, which will feature seven data centers, each offering 16 to 32MW of commissioned power. The first data center, VA3 opened in 1Q 2018 and is fully leased. Their current data center, VA4, has 32MW of commissioned power and was fully leased in 3Q 2020. The company is currently developing and pursuing pre-leases for their VA5 data center.

QTS
In 2Q 2020, QTS began construction on another Ashburn site acquired in 3Q 2019. The site will hold two data centers and a total of 1.08 million ft². Construction on the first 42MW data center began in 2Q 2020, with 6MW of commissioned power in phase 1.

Stack Infrastructure
In 1Q 2020, Stack Infrastructure announced their plan to construct a 4 million ft² campus in Manassas as a partnership with Peterson Companies. The campus is designed to offer up to 250MW of commissioned power. Stack is actively developing a build-to-suit data center for a single user on land they acquired from Peterson. They also acquired another 18-acre portion of the campus in 2Q 2021, where they can develop two 36MW data centers.

Vantage Data Centers
In 2Q 2021, Vantage opened their VA12 facility with 24MW of commissioned power which has a significant portion pre-leased. The entire building will be 36MW when it is fully finished. Vantage is also actively pursuing additional sites for future development in NoVa.

Trends in Supply
The past year has been an extremely active period for data center construction, as well as real estate transactions to lock down development sites for future data center campuses. However, when comparing to the report from 2Q 2018, there are significant changes in the market.

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Driven by growth around data requirements, more cloud instances, and the need for critical infrastructure, there has been substantial measurable growth in the NoVA market. The commissioned powered metrics more than doubled, the commissioned space almost tripled, and the vacancy rate dropped to just over 1%.

Numerous data center providers have been building new facilities, acquiring more land, and mergers and acquisitions aim to further consolidate the data center and hyperscale market. Please see the Colocation Providers and Key Updates section for information on new builds, land acquisitions, and construction.
NoVA Business Environment

Power Overview
To meet the voracious demand for data centers, the entire NoVa area has experienced uncommonly rapid growth of new electricity providers. According to published reports, Virginia has the lowest commercial electricity rates in the mid-Atlantic region. Virginia does not provide a wholly-competitive electricity market, but local regulators enable co-ops such as the NoVa Electric Cooperative (NOVEC) to resell service from monopoly provider Dominion Energy—doing business as Virginia Electric and Power. Therefore, the Virginia Electric and Power Company and NOVEC do not compete on price but rather on customer service offerings.

Hazard Risk Overview
The NoVa market is at low overall risk for natural disasters. NoVa is far enough inland to avoid the full force of hurricanes but does feel the impact of these storms’ remnants. While not an annual occurrence, large storms (called nor’easters) can strike the region with enough rain, snow, and ice to cause power outages and impede traffic. Earthquakes are rare in Virginia, with almost no significant activity in the past 50 years.

Tax Incentives Overview
The data center industry brings $1.2 billion in tax revenue into the Virginia economy annually, including $1 billion to local municipalities and $174 million to the state, according to a 2022 study from the Northern Virginia Technology Council. The study quantifies how the growth of cloud computing has created direct economic benefits for Virginia.

Legislation making qualified data center facilities exempt from Virginia’s sales and use taxes went into effect in 2009. To qualify, data center providers must spend at least $150 million and create between 25-50 new jobs in the area.

Records show the Commonwealth of Virginia waived an estimated $65 million in state and local sales tax revenue for data centers in 2017 alone. These tax incentives, combined with Virginia’s business-friendly environment, attracts data center investment that would otherwise go to the District of Columbia and Maryland.

Connectivity Overview
The region’s proximity to every federal government agency’s headquarters obviously plays a role in that world-class network connectivity. As a result, the area’s robust technology and financial businesses grew up around that connectivity. Hundreds of thousands of fiber miles laid by dozens of providers enable robust carrier-neutral broadband connectivity to many of the region’s data centers.
Colocation Providers and Key Updates

Digital Realty

Digital Realty is the largest global provider of cloud- and carrier-neutral data center, colocation and interconnection solutions, and supports the world’s leading enterprises and service providers by delivering the full spectrum of data center, colocation, and interconnection solutions.

PlatformDIGITAL®, the company’s global data center platform, provides customers a trusted foundation and proven Pervasive Datacenter Architecture (PDx™) solution methodology for scaling digital business and efficiently managing Data Gravity challenges. Digital Realty’s global data center footprint gives customers access to the connected communities that matter to them over 285 facilities in 50 metros across 26 countries on six continents.

Digital Realty is the dominant provider in the NoVa market in terms of the number of locations and square feet it operates. DLR’s initial investment in the NoVa market was at Loudoun Exchange, a 98-acre campus located in the heart of the Ashburn market. Two power substations—Dominion Energy’s Greenway and substations—provide up to 230MW total for the robust data center development. Buildings A-F were acquired or built over a seven-year period and are fully leased. Buildings G, H, J, and K are two-story buildings providing approximately 1.1 million ft² of space capable of supporting 74.3MW of commissioned power. All four buildings are fully leased.

Digital Realty purchased DuPont Fabros in September 2017 for nearly $8 billion, adding 12 wholesale data centers to Digital Realty’s portfolio, including the Ashburn Corporate Center in Ashburn, which spans seven large data centers.

In 2017, Digital Realty built Building L, the first building on their second Ashburn campus, which spans 96MW and was almost all is pre-leased. Construction and leasing have continued with Buildings M and P, and Digital Realty is currently under construction on Building R and design is underway on Building S, which will reside next to Building R.

In 2019, Digital Realty purchased a 424-acre site near Dulles Airport where they plan to construct between 8 and 13 data centers with potential development of 7.5 million ft² of space.

Digital Realty’s global data center footprint gives customers access to the connected communities that matter to them over 285 facilities in 50 metros across 26 countries on six continents.

In 2Q 2019, Digital Realty purchased a 13-acre site on Filigree Court for $28 million where permitting is ongoing. The company recently began the two-year process of converting the site into a 40MW data center.

Beyond Ashburn, Digital Realty operates data centers across NoVa.

Digital Realty owns three carrier-neutral data center facilities in the Lafayette Business Park in Chantilly, VA. At 4030 Lafayette Center Drive, DLR built a 25,000 ft² data center with multiple data halls and dual-feed power from Virginia Electric and Power. Adjacent buildings at 4040 Lafayette and 4050 Lafayette leverage the office park’s fiber and power, offering the similar configurations in 17,000 and 30,000 ft² data center spaces.

American Real Estate Partners (AREP)

Launched in 2003, American Real Estate Partners (AREP) is a real estate investment company that focuses on the acquisition and development of office and mixed-use properties on the East Coast. The company has obtained an excess of 17 million ft² of real estate since its inception and is shifting to include data center investments in the long-term corporate strategy. AREP acquired the 1.8 million ft² Ashburn-area Quantum Park in recent years. In 2021 it partnered with Harrison Street to buy a parcel of land on Beaumade Circle where they intend to construct a 265,000 ft² powered shell data center building. The parcel was previously owned by Chirisa Capital, which intended to execute a similar project. In early 2022, AREP and Harrison Street acquired the former America Online campus in Sterling, with plans to convert it into a 300MW data center campus featuring four powered shells. AREP and Harrison Street have also acquired property in Arcola in the Dulles Cloud Corridor where it plans to build a two-building campus.
Aligned Data Centers

Aligned Energy is an infrastructure technology company that offers colocation and build-to-scale solutions to cloud, enterprise, and managed service providers. The company strives to utilize intelligent infrastructure to deliver data centers like a utility—accessible and consumable as needed. By reducing the energy, water and space needed to operate, Aligned’s data center solutions are supplemented by patented cooling technology to improve reliability and data security. The company currently operates data centers in five U.S. metro markets—Chicago, Dallas, NoVa, Phoenix, and Salt Lake City—with their Plano facility claiming the title of the first pay-per-use data center in the industry. Aligned Energy is headquartered in Plano, Texas.

In 3Q 2018, Aligned purchased a 26-acre parcel in Ashburn to construct its first NoVa campus. Aligned plans to deliver up to 180MW of commissioned power across 880,000 ft². The first phase of capacity came online in 3Q 2019, with 6MW of commissioned power.

In 1Q 2020, Aligned began construction on the second building at its Ashburn campus, with the first phase coming online in 2021. A portion of the data center’s total 60MW of power was pre-leased.

Aligned is actively pursuing the acquisition of additional land in NoVa for development.

CloudHQ

CloudHQ is a data center provider headquartered in Washington, DC. The company was founded in 2016 by Hossein Fateh, the former CEO of DuPont Fabros Technology. The team at CloudHQ is comprised of industry veterans and builds data centers exclusively for hyperscale users. The company’s portfolio is primarily rooted in NoVa.

CloudHQ has two primary campuses in NoVa. First is a five-building campus in Manassas, MCC1-MCC5, that can offer over 180MW of commissioned power once fully built. A portion of the campus is leased to a single tenant. CloudHQ’s next campus is in Ashburn, where the company has three buildings active or in development, LC1-LC3. The company also owns land south of the campus where they can develop over 4 million ft² of additional space, as well as land in Manassas for future development.

Cologix

Formed in 2010, Cologix is a colocation provider with a footprint in multiple U.S. and Canadian markets. The Denver, CO-based firm delivers highly scalable colocation, network, and interconnection services. Cologix’s growth strategy is based on acquiring data centers in strategic, densely connected markets. They currently operate 38 data centers in 11 markets.

In 3Q 2018, Cologix purchased a 23-acre site in Ashburn to construct up to 1 million ft² of data center space. The site is Cologix’s first in NoVa. The site currently holds the Christian Fellowship Church building, which Cologix will demolish. Development on the site began in 4Q 2020, after the church vacated the existing in 2Q 2020.

Compass Datacenters’ product can be built anywhere, delivered in six months, and is Tier III designed and certified by the Uptime Institute, ensuring customers that the data center purchased is the data center delivered.

Compass Datacenters

Compass Datacenters is headquartered in Dallas, TX and delivers data centers for customers throughout the United States. Their product, which is typically constructed as 10,000 ft² and 1200 kW, can be built anywhere, delivered in six months, and is Tier III designed and certified by the Uptime Institute, ensuring customers that the data center purchased is the data center delivered. In addition, the product is easily scalable in equal amounts over time.

In 1Q 2018, Compass received approval to rezone a 105-acre land site to develop a 750,000 ft² data center campus near Leesburg. The rezoning was initially denied in 4Q 2017, pending further investigation into the campuses environmental impact. With the approval, Compass began construction on the site in 2Q 2019, with the first 6MW phase coming online in 2Q 2020. The company has recently submitted plans to consolidate future phases into a single multi-story building.
Corescale

Corescale is a venture that formed between USAA Real Estate and Patrinely Group. The official launch of Corescale has not happened yet, but the company has been making land purchases and preparing for a significant presence in NoVa. The Corescale team is composed up of veteran data center personnel who have worked for Apple, Google, Microsoft, and Rackspace.

Corescale entered the market in 4Q 2021 with plans for a 130-acre 300MW campus in Manassas. The Gainesville Crossing Digital Campus will be one of the largest data center campuses in NoVa, with over a million ft² of data center space planned. Corescale also plans to develop a campus in Sterling.

CoreSite’s dense environment of network and cloud/IT service providers give customers interconnection and peering opportunities throughout their facilities.

CoreSite

CoreSite is a colocation provider and former REIT headquartered in Denver, CO. With a location in eight different markets, CoreSite provides colocation and connectivity throughout the 24 data centers in their portfolio. Their dense environment of network and cloud/IT service providers give customers interconnection and peering opportunities throughout their facilities. In 2021, CoreSite was purchased by American Tower for $10 billion.

CoreSite operates data centers in two areas of NoVa: two data centers in Washington DC (DC1 and DC2) and three in Reston (VA1, VA2, and VA3).

CoreSite’s DC1 is at 1275 K Street NW in the heart of Washington, DC and hosts one of the primary meet-me rooms in the market. DC2 is nearby and leverages the region’s dense fiber infrastructure to attract nearby government and financial companies. The buildings are tethered by dark fiber directly to the Reston data centers, providing scalability with low-latency access to multiple Internet exchanges for peering along with a direct connection to Amazon AWS cloud services.

The 201,000 ft² VA1 data center is a two-story building designed to LEED Platinum-specifications.

The building is fed by two separate substations from Dominion Virginia Power. VA1 achieves an estimated PUE of between 1.5 and 1.6 and is built with N+1 redundancies for power/cooling. The facility offers approximately 12MW of commissioned power and 60,000 ft² of commissioned data center space. VA2 is built to similar standards, with approximately 12MW and 110,000 ft² of commissioned capacity. The data center is also Energy Star certified.

CoreSite purchased a nearby 21-acre parcel in 3Q 2016 where they intend to construct two data centers, VA3 and VA4. VA3 is designed to offer up to 48MW and 275,000 ft² of commissioned power and space once fully built. The company delivered the first 3MW phase in 1Q 2018, with another 6MW coming online in 2Q 2019.

Corporate Office Properties Trust

Corporate Office Properties Trust (COPT) is a publicly traded REIT with deep experience in data center development. The company has completed multiple build to suit developments and is focused on delivering reliable, compliant and scalable solutions to the market. Most of their data center development activity has taken place in the NoVa market.

COPT operates two large NGIT-VITA data centers purpose built for Northrup Grumman Information Technology and the Virginia Information Technologies Agency (overseeing the Commonwealth’s government IT programs). The enterprise/government customers rent space in COPT’s two 100,000+ ft² secure facilities: one at 201 Technology Park Drive in Lebanon, VA and the other at 11751 Meadowville Lane in Chester, VA.

COPT is active on a Manassas property known as Innovation Park. The company delivered two data centers in 2019 and 2020 on the campus, offering 150,000 and 200,000 ft² respectively. These buildings are fully leased to a single tenant. COPT can deliver four additional buildings on the site.

COPT also has a strong relationship with Amazon and has constructed multiple data centers for the cloud provider.
CyrusOne

CyrusOne is a global colocation company headquartered in Dallas, TX. It has more than 50 data center facilities throughout the United States, South America, Europe, and Asia and are continually growing. In efforts to drive down operational costs for customers, CyrusOne delivers their Massively Modular data center concept, which brings power/space to the market quickly in large facilities.

NoVa’s network density enables CyrusOne Ridgetop to act as a key hub for their National Internet Exchange (IX)—an interconnected network that unites all of CyrusOne’s data centers to enable high-performance/low-cost data transfers for their enterprise clients.

CyrusOne went public in 1Q 2013, steadily growing through both construction of new data center facilities in top markets and strategic acquisitions of rivals, including Cervalis in 2015 and Zenium in 2017. CyrusOne was taken to private ownership when purchased by KKR and Global Infrastructure Partners for $15 billion in 4Q 2021.

CyrusOne operates a 420,000 ft² campus at 21111 Ridgetop Circle in Sterling, consisting of their Sterling I, Sterling II, and Sterling III data centers. The first facility, Sterling I came online in late 2014, with additional phases and Sterling II and III coming online between then and 2017. The campus can accommodate high-density deployments from 200 to 1000 W/ft². NoVa’s network density enables CyrusOne Ridgetop to act as a key hub for their National Internet Exchange (IX). The CyrusOne National IX is an interconnected network that unites all of CyrusOne’s data centers to enable high-performance/low-cost data transfers for their enterprise clients.

Further south is their Shaw data center, Sterling IV. Built to similar standards as the Ridgetop site, Sterling IV features 12.6MW of commissioned power and utilized water-free cooling.

The company also operates a campus on Pacific Drive, known as the Kincora campus, which includes Sterling V and VII. Sterling V is a single building, which offers 72MW and 480,000 ft² of commissioned power and space. The building first opened in 3Q 2017. In 2Q 2018, CyrusOne executed a 9MW lease with China telecom, leading CyrusOne to begin development of the second half of their Sterling V building. Sterling VII is an additional building to be constructed on the northern portion of the site, which will offer 18MW of commissioned power.

In 3Q 2018, CyrusOne purchased a 154,000 ft² powered shell close to their Ridgetop campus which they will build out to offer 21MW of commissioned power. The data center, Sterling VIII, features two data halls, and first opened in in early 2019.

In 4Q 2018, CyrusOne purchased a 40-acre parcel of land in Sterling from DBT Data where it will construct their Sterling IX and X data centers. Sterling IX will offer up to 72MW of commissioned power at full build, with another 18MW in Sterling X. The first hall at Sterling IX opened in 2Q 2020.

Cyxtera

When private equity firms BC Partners and Medina Capital acquired CenturyLink’s colocation portfolio in 2017, they combined the assets gained to create a brand-new company called Cyxtera Technologies. Cyxtera is a global colocation business with 61 data centers in more than 29 markets. The company offers highly secure solutions to meet strict requirements.

Cyxtera operates six carrier-neutral data centers northeast of Dulles Airport in Sterling, VA. Three of Cyxtera’s data centers are located between the suburban sprawl of Dulles Town Center Mall and hiking trails of Claude Moore Park. Cyxtera DC2 and DC3 data centers are housed in two separate but adjacent buildings. DC2 offers an estimated 150 W/ft² on their 88,489 ft² of leased space. The Digital Realty-owned building was retrofitted to handle N+1 redundancy on power and cooling along with SSAE-16, HIPAA, and PCI compliance. Joined by a parking lot, Cyxtera DC 3 is slightly smaller at 78,761 ft² of leased space but all the same attributes. Cyxtera DC4 is across Nokes Boulevard in an office park off Ridgetop Circle. Although DC4 is configured with similar security, redundancy, and connectivity attributes of DC2/DC3, this much-larger building has 12MW of utility power for its 135,513 ft² of leased space.
Cyxtera DC5 and DC6 are in two adjacent buildings off International Drive. These data centers also deliver a minimum 120 W/ft² and N+1 redundancies for power and cooling. The DC5 facility has 3.2MW of total utility power on 47,508 ft² of leased space. The larger DC6 data center offers over three times more power and almost double the space (13.6MW total utility power and 71,033 ft² of leased space). All of the Cyxtera data centers in the market promise 100% uptime SLAs.

Cyxtera DC7 is in a single-story warehouse building in an office park two miles from Dulles Airport. Similar to the other five Cyxtera-operated data centers in the NoVa market, DC7 is built for data compliance, N+1 redundancy for power/cooling, and 24/7 physical security.

DataBank

DataBank is a provider of enterprise-class data center services, cloud solutions, interconnectivity, and managed services with a presence in various markets across the Central United States. DataBank was acquired by Digital Bridge Holdings in 2016 and has continually grown since. Due to a number of acquisitions since 2017 - namely that of C7 Data Centers, two facilities previously owned by 365 Data Centers, managed cloud firm Edge Hosting, and Zayo’s data center assets - DataBank increased its geographical footprint to 65 data centers across 29 markets and continues to pursue expansion opportunities.

DataBank operates two data centers in NoVa, both acquired through their purchase of Zayo’s data center assets in 4Q 2020. The first is a former Latisys data center located in Ashburn at 21635 Red Rum Drive. The data center provides over 10 kW per rack via a total of 21MW available power (9MW commissioned). The power and cooling infrastructure is configured for N+1 redundancy.

Their second data center is in McLean on Old Meadow Lane. The data center features 3MW of commissioned power along with 2N infrastructure redundancy.

In 4Q 2021, DataBank has announced they have started construction on a 200,000 ft² data center which will be located adjacent to their current location in Ashburn. The initial build will produce 4MW of capacity when it comes online in Q1 2023, with the ability to scale up to 40MW of capacity fully built out.

Founded in 2017, EdgeCore has plans to develop campuses in Phoenix, NoVa, Northern California, and Reno. Each campus is designed to accommodate over 100MW of critical capacity.

EdgeCore

EdgeCore is national provider of Tier III designed, highly connected, scalable data center solutions. Founded in 2017, EdgeCore has plans to develop campuses in Phoenix, NoVa, Northern California, and Reno. Each campus is designed to accommodate over 100MW of critical capacity. Their large-scale approach coupled with diverse cloud connections make their facilities an ideal candidate for enterprise and hyperscale users.

In 3Q 2018, EdgeCore purchased a 36-acre site in Sterling to construct their first campus in NoVa. The campus is designed to hold three 32MW, 180,000 ft² data centers. Although the campus is EdgeCore’s fourth, it will be the second campus they have begun development on.

In 4Q 2020, EdgeCore secured a pre-lease for their entire campus, prompting the company to seek out additional site acquisition opportunities.

Element Critical

Element Critical began with a large carrier neutral, network dense, and cross connect friendly Tier III storage facility in the heart of Silicon Valley and has since grown to offer colocation solutions in Chicago, Houston, and NoVa. Their headquarters is located in San Francisco, CA.

Element Critical’s NoVa data center is located at 7990 Quantum Drive in Vienna. The company operates 6.5MW of commissioned power inside the 200,000 ft² building. In 3Q 2019, Element Critical completed an infrastructure equipment upgrade aimed at providing additional client flexibility.
Equinix

Equinix is a global data center company providing colocation, interconnection, and connectivity services with 220 data centers in 26+ countries throughout the world. Equinix operates their data centers under the International Business Exchange (IBX) product name. The IBX system enables Equinix’s partners and users to leverage a scalable, globally connected technology platform for application, managed service, and information delivery.

Eleven of the 14 colocation facilities Equinix operates in NoVa are in Ashburn’s Data Center Alley. The DC1 building at 21711 Filigree Court is, like all Equinix’s data centers in Ashburn a SSAE16 SOC-1 Type II Certified data center. Fed by a single utility feed from Virginia Electric & Power, DC1’s 19,935 ft² of data center space is configured for 2N UPS redundancy and N+1 redundancy for its power and cooling. Across the parking lot is Equinix DC2, a similarly configured but much larger data center with 118,447 RFSF of space for colocation. Equinix DC3 at 44470 Chillum Place is a short drive from DC2. Still served by Virginia Electric & Power but with N+1 redundancy for its UPS system rather than the 2N of DC1 and DC2, this 67,041 ft² data center is a sublease in a larger DLR-owned building.

Equinix DC4 at 21691 Filigree Court retains the N+1 redundancies for UPS, power, and cooling in a secure 60,587 ft² data center space owned by Equinix. DC5 is located in a 92,000 ft² building with 57,545 ft² of data center space and configured for N+1 redundancies across the board. DC6 is at 21721 Filigree, and offers 59,370 ft² of commissioned data center space configured for N+1 redundancies. Rounding out the Equinix-operated data centers off Filigree Court is DC11. The main entrance to DC11 is actually inside DC6, which adds to the large two-story building’s 24/7 security. Configured for multiple data halls, the data center is fully delivered with 9.5MW and 95,000 ft² of commissioned capacity.

Equinix DC10 is outside of their Filigree Court complex at 21551 Beaumeade Circle. This 150,504 ft² building supports up to 15 kVA per cabinet but higher densities are available if clients request them.

Equinix has two additional data centers next to their DC10 facility, DC12 and DC15. The first phase at DC12 opened in 4Q 2017, which offers 10.8MW of commissioned power. Equinix can add a further 14.2MW in future phases. DC15 is a smaller data center that opened in 2Q 2020. The first phase features approximately 8MW of commissioned power, which can be doubled in future phases.

In 4Q 2020, Equinix opened their DC21 data center on land acquired in 2017 off Beaumeade Circle. DC21 will offer approximately 15MW across space for 3,200 cabinets. The first phase included 3MW of commissioned power.

Equinix acquired three Verizon data centers in the NoVa market in 2Q 2017, including one 76,000 ft² commissioned data center at 21830 UUNET Way in Ashburn and one at 7400 Infantry Ridge Road in Manassas. The third Verizon data center is the Network Access Point (NAP) of the Capital Region in Culpeper, VA about 60 miles south of Ashburn. This former Terremark campus of eleven bunker-like structures totals 850,000 RFSF.

Equinix operates two additional data centers in neighboring Vienna, VA. The DC7 facility at 7990 Science Applications Court was built in two phases: Phase 1 handles 2.4 kVA per cabinet with N+2 UPS redundancy. Phase 2 handles a larger 4 kVA per cabinet with N+1 UPS redundancy. The total 27,356 ft² of commissioned data center space in DC7 receives power from two utility feeds and has access to four separate transformers. Equinix DC8 at 8502-A Tyco Road is a relatively small 9,972 ft² data center with a single utility feed to deliver up to 2.4 kVA per cabinet.

Evoque Data Centers

Established in 2019, Evoque Data Center Solutions is a colocation provider that operates more than 30 data center facilities worldwide. A portfolio company of Brookfield Infrastructure, the company was launched in January 2019 upon the Brookfield acquisition of AT&T’s data center assets. The subsequent rebranding to Evoque included the transfer of colocation operations, fixed assets, leases, and ownership of 31 facilities (18 located in North America) to the new company.

Evoque’s Ashburn IDC at 21571 Beaumeade Circle offers two direct connections to AT&T’s ultra-fast 40 Gb national network. The Ashburn IDC consists of two buildings, A and B, and each building has its own 34.5 kV power feed. The two buildings combined are 178,730 ft² with 96,644 ft² of commissioned data center space.
H5 Data Centers

H5 Data Centers is a colocation and wholesale data center provider with fourteen facilities in the United States. The privately-owned company designs data center and interconnection solutions for carriers, colocation, enterprise, and government customers. H5 Data Centers currently owns data centers in Albuquerque, Ashburn, Atlanta, Charlotte, Cincinnati, Cleveland, Denver, Phoenix, Quincy, San Antonio, San Jose, San Luis Obispo, New York, and Seattle.

Acquired in June 2015, H5’s Ashburn data center is a retrofitted industrial building on a five-acre site in Data Center Alley. With a total 8.5MW of future commissioned power, the H5 Ashburn Data Center is offered as either wholesale data center space, a powered shell for custom data center builds, or a build-to-suit design for a specific customer.

Iron Mountain Data Centers

Iron Mountain is a data center operator headquartered in Boston. The company has facilities in Boston, Kansas City, NoVa, Pennsylvania, Denver, Amsterdam, London, India, and Singapore, and is beginning to grow into additional markets to compete in the colocation industry.

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Iron Mountain Data Centers

Iron Mountain is a data center operator headquartered in Boston. The company has facilities in Boston, Kansas City, NoVa, Pennsylvania, Denver, Amsterdam, London, India, and Singapore, and is beginning to grow into additional markets to compete in the colocation industry. Iron Mountain is more specifically known for its two underground data centers in Pennsylvania and Kansas City. In 1Q 2018, Iron Mountain purchased IO Data Centers, adding data center assets in Phoenix, New Jersey, and Columbus.

Iron Mountain owns an 83-acre site in NoVa where they plan to build a four-building campus over several years. The site is within close proximity to a new substation. Iron Mountain intends to market their services toward corporate and government customers. Iron Mountain delivered the first 10.5MW phase of VA1 in 3Q 2017.

Spurred by a 6MW pre-lease signed at VA1 in 3Q 2019, Iron Mountain began to develop their VA2 facility, which opened in 2Q 2020. Iron Mountain delivered the first hall at VA2 with 4MW of commissioned power. VA2 is designed to offer 24MW and 109,400 ft² of commissioned power and space at full build.

In 3Q 2020, Iron Mountain signed a lease for the entire 4MW hall with a government agency. In December 2021 Iron Mountain announced a 20-megawatt lease at VA-2, prompting the expansion of the facility from 30 to 36MW.

In 2Q 2021, Iron Mountain purchased an 18-acre parcel adjacent to their current land, giving them room to expand the existing campus to over 100MW.

Lincoln Rackhouse

Established in 1965, Lincoln Property Company has focused on managing residential and commercial properties for over 40 years. Upon acquisition of Rackhouse Group in 2010, the newly created Lincoln Rackhouse division allowed Lincoln Property Company to diversify its professional repertoire to include data center development and construction services for enterprise clients.

In 3Q 2016, Netrality Properties purchased four data centers from Digital Realty: two in St. Louis, and two in NoVa at 1807 Michael Faraday Court and 251 Exchange Place. Two weeks after the purchase, Netrality sold the NoVa facilities to Lincoln Rackhouse.

In 1Q 2018, Lincoln Rackhouse executed a lease with colocation provider Evocative. Evocative will lease all capacity at Lincoln’s 1807 Michael Faraday data center, with an option to purchase the property in the future.

In 2Q 2019, Lincoln Rackhouse purchased ByteGrid. The transaction included ByteGrid’s MDC-1 and MDC-2 data center in Silver Springs, MD. The company’s eleven-acre campus in Silver Spring, MD houses two highly secure data centers that primarily serve the region’s numerous government and commercial users. The MDC-1 data center currently has commissioned 9MW of utility power and 90,000 ft² of commissioned data center space.

In 3Q 2019, Lincoln Rackhouse signed a lease with Agile Data Sites, with the aim of having them provide the operations for the facility.
NTT Global Data Centers Americas

Founded in 1999, NTT Global Data Centers Americas is a division of the telecommunications company NTT (Nippon Telegraph and Telephone Corporation). The company deploys network services in an excess of 190 countries and delivers over 5.3 million ft² of data center space to 20 regions worldwide. In 2019, the company announced a rebrand of all data center subsidiaries – RagingWire, e-Shelter, Gyron Internet, and NetMagic – under NTT’s umbrella, renaming the newly formed company NTT Global Data Centers. NTT Global is headquartered in London, England.

NTT VA1 at 44664 Guilford Drive in Ashburn, VA offers 14.4MW of commissioned power, enabling power densities of up to 260 W/ft² and between 16 kW-20 kW per cabinet. NTT’s VA1 has 70,000 ft² of commissioned data center space with 26,000 ft² available to expand along with office space and conference rooms. The NTT VA2 data center is adjacent to Virginia Dominion’s Beaumeade electrical substation and is designed to provide densities beyond 30 kW per cabinet. The 140,000 ft² two-story building is purpose-built to house both data center and premium office spaces.

NTT also operates a large campus at the Gigabit Plaza, which will feature seven data centers, each offering 16 to 32MW of commissioned power. The first data center, VA3 opened in 1Q 2018 and is fully leased. Their current data center, VA4, has 32MW of commissioned power and was fully leased in 3Q 2020. The company is currently developing and pursuing pre-leases for their VA5 data center.

PhoenixNAP

Founded in 2009, PhoenixNAP is a global IT services provider offering high-performance Infrastructure-as-a-Service (IaaS) solutions from locations worldwide. The company focuses on bare metal servers, cloud, hardware leasing, and colocation options built to meet the evolving technology demands enterprises. The company has locations in Atlanta, Phoenix, NoVa, Belgrade, Singapore, and Amsterdam.

PhoenixNAP markets their Ashburn data center to clients with smaller requirements, half-cabinet environments up to multiple cabinet colocation solutions. These modular designs for compute and storage environments can handle densities up to 250 W/ft² delivered via 40MW of on-site substation power.

QTS Realty Trust

QTS Realty Trust (QTS) is a leading data center provider with more than 25 data center properties in the continental United States. The company traditionally finds large, robust facilities and transforms them into LEED-certified data centers. QTS’ client list includes mostly Fortune 1000 customers, to whom they provide hybrid, wholesale, and hyperscale data center services, along with a variety of managed services through their software-defined data center infrastructure. While previously a publicly traded REIT, QTS was acquired in 3Q 2021 by BlackStone Group for $10 billion.

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QTS has a flagship data center in Ashburn at 22271 Broderick Drive. The data center is designed for 32MW of commissioned power across 12 halls. Phase 1 at the data center came online in 3Q 2018. The building offers 32MW of commissioned power fully leased. They also own land nearby where they can construct a data center with 105MW of commissioned power.

In 1Q 2018, QTS purchased a 61-acre land site in Manassas to construct another campus. The campus will accommodate a new 24MW lease QTS. In 3Q 2018, QTS purchased three parcels in Manassas, totaling 37 acres, for $6 million. The site, at 10601 Pyramid Place, is currently permitted for approximately 450,000 ft², but could change. The site is next to a 200 to 300MW substation.

In 2Q 2020, QTS began construction on another Ashburn site acquired in 3Q 2019. The site will hold two data centers and a total of 1.08 million ft². Construction on the first 42MW data center began in 2Q 2020 and was completed in Dec 2021, with 6MW of commissioned power in Phase 1. QTS has recently begun construction on the second data center on the Shellhorn campus.

In 2Q 2021, BlackStone Group announced its plans to acquire QTS, with the intent to take the company private. The transaction closed in 3Q 2021.
Northern Virginia Data Center Market

Sabey Data Centers

Sabey Data Centers is a data center provider developing turnkey and powered shell multi-tenant data center solutions to clients across the United States. Based in Seattle, Sabey’s product appeals to corporate users valuing dedicated infrastructure and a partner with mission-critical data center and real estate development experience. The company has delivered data centers throughout Washington State, New York, and Ashburn, VA.

Sabey operates a carrier-neutral data center campus on 38 acres in Ashburn, VA. The site’s three buildings will offer powered shell, wholesale colocation, and build-to-suit options built to meet the SSAE 16 Type II Certification and be fed by an onsite electrical substation capable of delivering 384MVA. Mirroring Sabey’s proven “Intergate” data center facility design, the Ashburn campus will provide office space, loading docks, and 24/7 security.

In 1Q 2017, Sabey delivered the first capacity in Building C at Intergate.Ashburn, fully delivering the last of the four 1.8MW, 12,000 ft² halls in 2Q 2018. The building is currently fully leased.

In 2Q 2018, Sabey began construction on their second Ashburn building, Building B, which is currently in a shell state. Sabey will deliver 5.4MW of commissioned power initially and can add another 16.2MW in the future.

Sentinel Data Centers

Founded in 2001, Sentinel Data Centers is a privately held colocation company. The company has delivered 1.6M ft² of data center space for Fortune 500 Companies. Sentinel’s current footprint includes facilities in Tennessee and New York, with land in NoVa. Sentinel traditionally appeals to large, corporate users in the financial services, healthcare, technology, media, and biotechnology industries.

In 3Q 2017, Sentinel purchased 65 acres of land in Loudoun County. The land was part of AOL’s 100-acre campus. Soon after purchase, however, Sentinel sold a large portion of the site to Vantage. Development on the remaining site began in 2Q 2018 after securing a 40MW pre-lease.

In 3Q 2018, Sentinel purchased a 280-acre site in Ashburn for $82.5 million. The company initiated development of the first data center on the site in 4Q 2020 after securing a pre-lease from a hyperscale tenant.

Stack Infrastructure

Launched in 2019, Stack Infrastructure is a data center company branded and sponsored by investment company IPI Partners. Designed to meet the needs of both rapidly scaling enterprises and hyperscale companies, Stack offers an array of tailored infrastructure services to customers across the U.S. Stack’s current assets include 21 data centers and parcels of land in nine U.S. markets.

The Ashburn data center at 22080 Pacific Boulevard in Sterling, VA is a retrofit originally built for AOL during the dot-com boom sitting on premier fiber infrastructure. Plans call for a total of 18MW of commissioned power, with Phase I offering three data halls totaling 6MW. The data center is HIPAA, PCI, SSAE 18, ISO, and Uptime M&O certified.

In 1Q 2020, Stack Infrastructure announced their plan to construct a 4 million ft² campus in Manassas as a partnership with Peterson Companies. The campus is designed to offer up to 250MW of commissioned power. Stack is actively developing a build-to-suit data center for a single user on land they acquired from Peterson. They also acquired another 18-acre portion of the campus in 2Q 2021, where they can develop two 36MW data centers.

In 4Q 2021, Stack has started construction on a new facility which will bring 36MW of capacity and is expected to be available in Q4 2022. The facility will be able to produce 72MW upon full build-out. The company also acquired two parcels of land in Manassas from Amazon for nearly $88 million.

In January Stack announced plans for a 216MW data center campus in Ashburn, adjacent to campuses for QTS and Digital Realty off Loudoun County Parkway. The new 80-acre site will feature three buildings and offer nearly 1 million ft² of data center space.
Vantage Data Centers

Vantage Data Centers is a U.S. colocation data center provider headquartered in Silicon Valley. Backed by Digital Bridge, the company designs and builds data centers to attract corporate users that need 250 kW or greater. Vantage has completed transactions with Fortune 100 and top Internet companies. They currently have 25 campuses spread over five continents.

Vantage operates a data center campus on a 42-acre site formerly owned by AOL. Vantage intends to construct a five-building campus on the site acquired in 4Q 2017. The first building came online in 1Q 2019 with 6MW of commissioned power in Phase I. As of 3Q 2021, Vantage was under construction with the final phase at Building 1, which is nearly full. Strong leasing at Building 1 also accelerated development of Building 2, which is currently under construction.

In 2Q 2021, Vantage opened their VA12 facility with 24MW of commissioned power which has a significant portion pre-leased. The entire building will be 36MW when it is fully finished. Vantage is also actively pursuing additional sites for future development in NoVa.

VPLS Solutions

VPLS Solutions is an IT services provider formed in 2019 after Evocate’s purchase of VPLS. Solutions from VPLS include cloud, managed services, and colocation, as well as access to the company’s global network backbone. VPLS operates 18 data centers in the U.S., Europe, and Asia, all of which are carrier neutral and feature diverse compliance certifications.

Yondr Group’s aim is to aid users with all of their data center needs at any point in the process, including consultation, design, and operations.

Yondr Group

Yondr is a data center services provider based in Amsterdam. The company’s aim is to aid users with all of their data center needs at any point in the process, including consultation, design, and operations. Yondr has done work in Amsterdam, London, Dublin, Belgium, and Finland.

Yondr established its first North American presence in NoVa. The company has acquired two sites in Loudoun and Prince William Counties where they intend to construct over 500MW of commissioned power.
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