

DATA CENTRE PRICING NETHERLANDS 2014 to 2019

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To purchase this report please contact Caroline Hitchins on +44 (0) 7544 121900 or email caroline@datacentre.me

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A list of Dutch Data Centre companies mentioned in the report

Below TCL provides a list of the Dutch Data Centres that are mentioned in this report:

BIT
BT Global Services
Citadel 100
ColoCenter Zoetermeer
COLT Telecom
Data Place
Databarn
Datacenter Den Holder
Datahouse
Data Center Freisland
Easycolocate
Easynet
Equinix
Evoswitch
Eurofiber
Global Switch
Global-E Data Center
Green House Data Centers
Gyro Center
I3D Data Centre
Interconnect
InterDC
Interoute
Interxion
ISP Services
ITB Datacenter
KPN CyberCenter
Level (3)
NAP of Amsterdam
NedZone Data Center
NIKHEF
Previder
SARA
Serverius
Spaanse Kubus
Switch DataCenter Group
TCN Data Hotels
TelecityGroup
The DataCenter Group
Verizon Business

Introduction – Data Centre Pricing Netherlands – 2014 to 2019 report

The TCL **Data Centre Pricing Netherlands – 2014 to 2019** report provides a unique overview of Data Centre pricing for the Dutch market. It is based on a survey of 54 Data Centre operators with 117 Data Centre facilities across the Netherlands - which consists of a total of almost 348,000 square metres of raised floor space forecast as of the end of 2014.

The Dutch Data Centre market has seen considerable growth in both the number and the size of Data Centre facilities being built, with existing Data Centre players continuing to add to their existing facilities and build new Data Centres in existing locations or cities.

Data Centre facilities in the Netherlands are clustered around the Amsterdam area, which remains the biggest single region for facilities. But more facilities are now being built in other cities of the country, particularly around Rotterdam.

Research Methodology

The **Data Centre Pricing Netherlands – 2014 to 2019** report was written over the period from the end of November 2013 to the end of December 2013.

The report consists of information from both primary and secondary sources. It also includes information from other TCL reports (including the TCL Premium Data Centre report) as well as the TCL Data Centre Price Tracker subscription service.

The report is based on an analysis of some 54 Data Centre providers in the Netherlands consisting of some 117 Data Centre facilities in total, with raised floor space per facility averaging 2,974 square metres (as of the end of 2014).

The basis of the report is a unique model of the Dutch Data Centre market developed by TCL which includes the key metrics of power, raised floor capacity and rack space and per square metre pricing by both facility and by Data Centre provider.

The model can be segmented by location and by the 3 main types of Data Centre segment type (which are Carrier Based, Carrier Neutral & Premium Data Centres) used in the report. The information used in the model is obtained from the provider as part of a “bottom up” process.

The report also uses telephone and face to face interviews along with a TCL questionnaire, which is used to provide information on Data Centre capacity and demand factors for the forecast.

The TCL report also uses information which comes from a range of sources including independent experts, Data Centre company presentations, telecoms companies, IT companies and real estate companies. All taxes and VAT are excluded from the Data Centre pricing shown in this report.

The main Data Centre segments identified in this report

The Data Centre types used in this report are Carrier Based, Carrier Neutral or a Premium Data Centre provider – and the types are defined as follows -

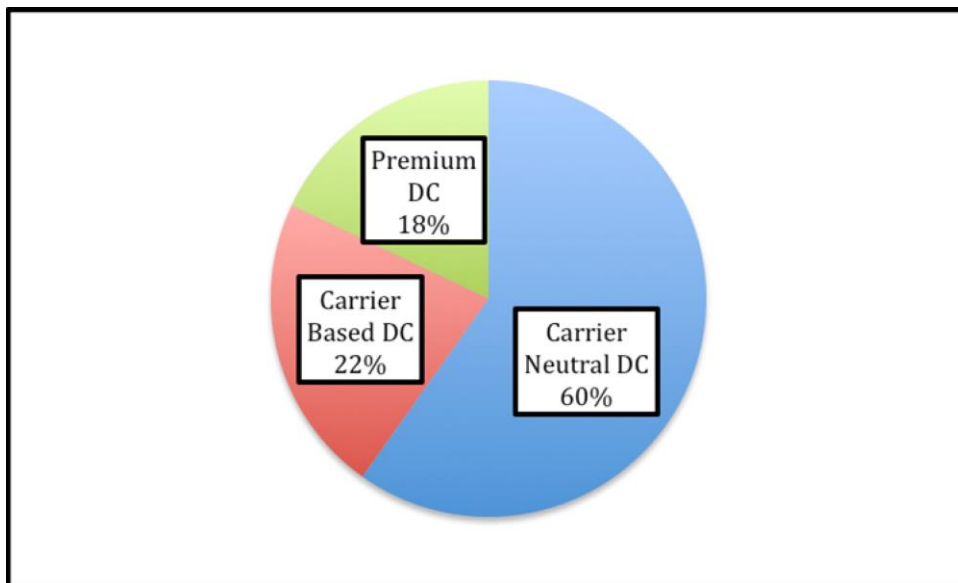
- **A Carrier Based Data Centre provider** - for the purposes of this report is defined as being a subsidiary of a telecoms provider and is able to provide a limited choice of telecoms networks from a facility.

- **A Carrier Neutral Data Centre provider** - for the purposes of this report is defined as being a company which is not owned by a domestic network provider and has multiple telecoms networks from a facility.
- **A Premium Data Centre provider** - for the purposes of this report is defined as being able to support high density power per rack space combinations of up to 20 kW or above.

The pricing used in the report is obtained in confidence from the Data Centre providers themselves. When received in confidence the individual pricing Data Centre pricing is not revealed, but is used with other pricing to make a market average price.

Below TCL provides a breakdown of the numbers of Dutch Data Centre facility by the 3 main segment types (Carrier Neutral, Carrier Based or Premium Data Centre segment types) in the pie chart below -

Figure: A pie chart showing the number of Dutch Data Centres by segment type - in per cent as of the end of 2014



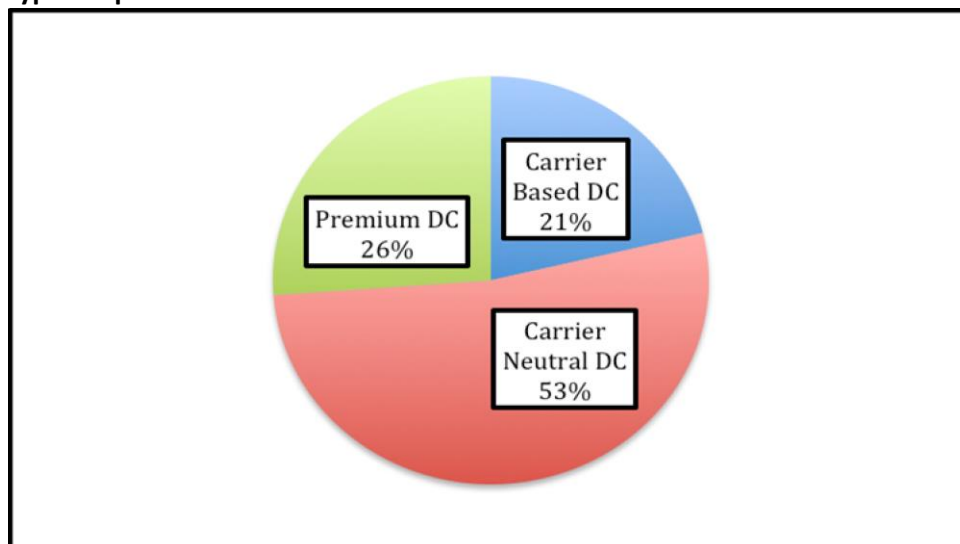
Source – TCL (Sample: 117 Data Centre facilities)

In the Dutch market the most common of the 3 main Data Centre types - surveyed by numbers of facility are the –

- Carrier Neutral Data Centre type, which now accounts for almost 60 per cent of the market (some 67 facilities),
- Carrier Based Data Centre, which now accounts for 22 per cent (some 26 facilities),
- Premium Data Centre (which is capable of offering 20kW per rack as standard) taking up the remaining segment of 18 per cent (some 22 facilities).

The breakdown of the 3 main Data Centre type segments is also shown in the pie chart below according to the proportion of raised floor space available -

Figure 6: A pie chart showing the proportion of Data Centre raised floor space available by segment type - in per cent as of the end of 2014



Source – TCL (Sample: 117 Data Centre facilities)

In the Dutch market it is also the Carrier Neutral Data Centre which has the largest proportion of raised floor space by segment type – the segment types (by raised floor space) as of the end of 2014 are –

- Carrier Neutral Data Centres – accounts for 53 per cent of all Dutch Data Centre raised floor space (with over 182,000 square metres)
- Premium Data Centres - accounts for 26 per cent of all Dutch Data Centre raised floor space (with over 91,000 square metres)
- Carrier Based Data Centres – accounts for 21 per cent of all Dutch Data Centre raised floor space (with 74,000 square metres)

The Carrier Neutral Data Centre is the largest segment in the Dutch Data Centre market followed by the Premium Data Centre market.

The Data Centre Tier certification used in the report

Also TCL emphasises that it should be noted that the Data Centre Tier grade certification and the Data Centre PUE ratio where mentioned in the report has been obtained from each Data Centre provider and has not been independently verified by TCL in this report.

The Data Centre Tier grade certification used in this report is developed by the US-based Uptime Institute and is outlined in the Summary Box below:

Summary Box – The Uptime Institute Data Centre Tier Classification

The Uptime Institute Data Centre Tier Classification

The US-based Uptime Institute has created a standard classification of Data Centre resilience which is as follows:

Tier 1: Single path Power & Cooling distribution; no redundant components – 99.671% availability

Tier 2: Single path Power & Cooling distribution; redundant components – 99.749% availability

Tier 3: Multiple path Power & Cooling distribution but one path active; redundant components – 99.982% availability

Tier 4: Multiple path Power & Cooling distribution with active paths; redundant components – 99.995% availability

The Power Usage Effectiveness (PUE) ratio used in this report

The Data Centre PUE ratio that is used in the report stands for “Power Usage Effectiveness” and measures the total amount of power used by the Data Centre against the amount that is used for IT hardware.

The higher the PUE ratio, the lower the proportion that is used by IT hardware, and the more that is used by the Data Centre facility itself.

As an example, if a Data Centre has a stated PUE ratio of 1.3 – than for every 1 watt of power consumed by the IT hardware, another 0.3 watts of power is consumed by the ancillary services of the Data Centre.

Again, it should be noted that the PUE ratio used by TCL is provided by the Data Centre itself, which has not been independently verified.

The Data Centre pricing used in this report

TCL also receives Data Centre pricing directly from providers and users, and from published sources.

Where the individual Data Centre pricing is published in this report it is because the pricing has already published in the public domain.

The individual pricing received is used to provide an average price for Carrier Based, Carrier Neutral and Premium Data Centres in the Netherlands and the individual Data Centre’s price is not disclosed.

It should be noted that the Data Centre pricing received by TCL is list pricing and does not take into account discounts that may be offered for large space or promotional discounts.

For comparison purposes the standard rack space pricing and per square metre pricing is shown with no or minimal power bundles (of 1 kW) or of access to power without the power charge being included.

Rack space rental pricing is used - where appropriate - to derive pricing per square metre – by dividing the rack space rental by 2.5 square metres – which becomes a per square metre rental cost.

The other metrics used in this report

In the report for consistency all power per rack is shown in kilowatts (kW) per rack and in kilowatts per hour (kW per Hour). Total power into the Data Centre from the national grid is shown in MegaWatts (MW) or MVA.

The rack space used in the report is the standard size of 19” – with a single phase power supply. The pricing used is standard retail pricing for rack space and square metre pricing. Minimal power is included where power is bundles with rack space as standard by the Data Centre provider.

Appendix

Appendix One – A brief glossary of terms used in the report

Appendix One - A Brief Glossary of terms used in the report

Amps: Ampere is a standard unit of electrical current, and is a measure of the amount of electric charge. Many power in racks are shown in Amps and can be converted into kW as follows –

- 8 Amps = 1.92 kW
- 10 Amps = 2.4 kW
- 16 Amps = 3.5 kW
- 20 Amps = 4.8 kW

MW: Mega Watt: is 1,000,000 (one million) units of watts

kW: kilo Watt: is 1,000 (one thousand) units of watts

kW hour: (kWh) – kilo Watt per hour – is an amount of kilo watts consumed per hour

KVA: is Kilo Volt Ampere which corresponds to 1000 volt amperes. Volt-ampere (VA) is the voltage multiplied by the current load.

PUE: is Power Usage Effectiveness, a measure of the Power used directly by IT hardware in the Data Centre against the total power that is consumed, presented as a metric. The lower the metric the more efficient the facility.

N+1: N+1 is the use of one active back up component which can be shared among a range of components

N+N: N+N is the use of one active back up component for each component.

Watt: named after James Watt; a measure of electrical power. One watt = one ampere of current flowing at one volt

Free Air Cooling: is a method of cooling heated air in the Data Centre facility by using naturally cool external air or water without the use of artificial chilling.

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