

Data Centre Pricing in Europe

2015 to 2020

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Methodology

Background to the Data Centre Pricing in Europe report

The aim of the latest Data Centre Pricing in Europe – 2015 to 2020 - report is to provide a comprehensive overview of Data Centre pricing across Europe from more than 750 Data Centre Providers in 24 key European countries. Country Markets covered by the report include the following:

Austria, Belgium, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Italy, Luxembourg, Netherlands, Norway, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, Switzerland and the UK.

A full list of the Data Centre operators included in this report is provided in Appendix One.

Below shows the breakdown of the 24 Data Centre countries shown in this report, by the number of Data Centre providers, facilities and raised floor space in a table below:

Figure 1: A table showing the breakdown of the number of Data Centre Providers, number of Facilities, raised floor space (capacity available or ready to be built out) and total customer power by Country Market

	Number of Data Centre Providers	Number of facilities	Total Capacity m2	Total Customer Power MW
Austria	x	x	x	x
Belgium	x	x	x	x
Czech Republic	x	x	x	x
Denmark	x	x	x	x
Finland	x	x	x	x
France	x	x	x	x
Germany	x	x	x	x
Greece	x	x	x	x
Hungary	x	x	x	x
Iceland	x	x	x	x
Ireland	x	x	x	x
Italy	x	x	x	x
Luxembourg	x	x	x	x
Netherlands	x	x	x	x
Norway*	x	x	x	x
Poland	x	x	x	x
Portugal	x	x	x	x
Romania	x	x	x	x
Slovakia	x	x	x	x
Slovenia	x	x	x	x
Spain	x	x	x	x
Sweden	x	x	x	x
Switzerland	x	x	x	x
UK	x	x	x	x
Total	752	1,512	3,024,000	3,437

*The space figures for Norway include the proposed Lefdal Mine Data Centre development of 120,000 square metres. Without the Lefdal Mine the Norwegian space is 56,000 square metres. In the rest of the survey the Lefdal Mine space is omitted.

This report is based on a survey of more than 750 Data Centre providers and over 1,500 Data Centre facilities across the 24 Country Markets. The largest Country Market remains the UK, followed by Germany, France and the Netherlands – these four markets dominate the 24 Country Markets in the survey, accounting for half of space and power.

The report writer is able to use a wide range of information sources as well as via their own contacts in their extensive database.

The 2015 to 2020 report differs from the previous 2013 report as it has been comprehensively updated with an extended 5-year forecast from the end of 2015 to the end of 2020. The new report includes Data Centres in Iceland for the first time and places more emphasis on Data Centre power (MW) as well as space, with a forecast for pricing per kW as well as standard rack space and per square metre pricing.

The new report incorporates some of the findings from the recent individual Data Centre Country Market reports made by the report writer for France, Germany, Netherlands and the UK as well as their other European publications.

The new report also includes the following updates –

- The main identified customer sectors driving Data Centre demand
- Existing revenue growth per occupied square metre of space
- Data Centre gross profit margin trend over time

Where possible the report seeks to identify the gross profit margin and the scope for Data Centre providers to continue to increase their pricing. It attempts to identify the amount of pricing power that is held by the Data Centre provider. It also considers Data Centre Capex expenditure measured by cash-flow – as a means of identifying the cost of investment in new facility upgrades.

The main information on these financial trends is provided by publicly quoted Data Centre specialists (including Equinix, Interxion and TelecityGroup). By considering trends in the gross profit margin, the report writer attempts to assess whether Data Centre providers are able to extend their pricing power to increase profitability.

It also provides more detailed analysis of trends that impact the Data Centre in Europe including the emergence of Cloud computing, SaaS (Software as a Service) and Managed Services. The report considers the main trends impacting both the Carrier Based Data Centre segment as well as the Carrier Neutral Data Centre segment.

Definitions used in the Data Centre Pricing in Europe report

It should be noted that for the purposes of this report that the Carrier Neutral Data Centre can be defined as being an independent company with no shareholding by a telecoms operator and also have at least 3 separate network providers available for customer use.

By contrast the Carrier Based Data Centre is normally owned by a telecoms operator and typically provides network services based on its own telecoms infrastructure with perhaps one other network supplier.

The report does not include Data Centres used purely by the enterprise user as an “in-house” facility. Its focus is on the Carrier Neutral or Carrier Based Data Centre segment.

However, the report does identify the range of business models that are being used by the various Data Centre operators in Europe – including Co Location, Hosting, Wholesale and Enterprise models.

Details of the Data Centre Pricing in Europe report

The report was written over the 5 month period from March 2015 to July 2015.

In this report all currencies used are converted into Euro at the rate shown by Bloomberg as of the 20th of March 2015. The full exchange rate conversion is shown in the table in Figure 1 below:

Figure 2: A table showing the currency exchange rates that are used in this report

Country	Currency	Abbreviation	1 Euro conversion
Czech Republic	Czech Koruna	CZK	27.4
Denmark	Danish Krone	DKK	7.5
Hungary	Hungarian Forint	HUF	303
Iceland	Iceland Krona	ISK	149
Norway	Norwegian Krone	NOK	8.7
Poland	Polish Zloty	PLN	4.1
Romania	Romanian Leu	ROL	4.4
Sweden	Swedish Krona	SEK	9.3
Switzerland	Swiss Franc	CHF	1.06
UK	British Pound	GBP	0.72
USA	US Dollar	USD	1.08

Source: www.Bloomberg.com (as of March 20th 2015).

Throughout this report space is reported in square metres (metre 2). Where applicable space was converted from square feet into square metres using the formula of 10 square feet = 0.929 square metres.

Data Sources used in the Data Centre in Europe report

It should be noted that the report was produced using a mixture of desk research and primary research. Most of the pricing contained in the report comes from over 750 separate Data Centre providers from the report writer's updated database, with the remainder from public sources including company annual report and accounts.

It should be noted that although there are over 750 Data Centre providers included in the research, the actual number of facilities is considerably higher as several providers have multiple facilities with pricing that is often facility-specific. The report writer estimates that there are over 1,500 Data Centre facilities identified across the 24 European markets.

The primary research also included interviews with key Data Centre providers and users and the use of a questionnaire to provide feedback on pricing and space forecast and trends.

The questionnaire was then followed up by a direct contact or telephone interview to elicit further information such as power pricing, utilisation and revenue trends.

As the pricing information provided is frequently commercially sensitive – and can be subject to an NDA – the report writer is not able to disclose individual pricing per provider unless the information is already in the public domain.

Where the price information given is already available in the public domain – in some cases for example it is published on the Data Centre provider's website – then the report writer does disclose the pricing in the report.

The report writer provides per rack pricing based on a standard 19" rack, in general with 42 U capacity typically with a 16 A single phase power supply included. Power usage is not included. The report writer provides per rack pricing bundled with a number of different per kW rates, which are provided by the Data Centre operators.

To calculate the price market averages the report writer received pricing directly from the service provider which was then used to generate an average per rack or per square metre price (in Euro per square metre).

In some cases the report writer had to convert the rack or cabinet metric to arrive at a per square metre revenue using a conversion rate of 1 rack = to 2.5 square metres.

It should be noted that all of the Data Centre pricing – and pricing for power - included in the report does not include VAT (or any other tax). Also, installation costs are mentioned in the first chapter of the report and are not included in the country by country survey as there is no significant variance by country.

Additionally the Data Centre pricing received for this report may not reflect the full commercial rate that may be payable following negotiation. Also, other discounts are available depending on payment options.

To give an extreme example, a Romanian Data Centre provider currently offers a 15 per cent discount off the monthly rack space price if a user pays 6 months in advance and a 30 per cent discount if the user pays 12 months in advance.

Other sources include Eurostat (the EC statistics service), which provides industrial electricity pricing across the EU-27 countries. For Switzerland, which is covered by Eurostat, the report writer received industrial electricity pricing from the Swiss Federal Statistical Office.

Innovations for the 2015 edition of the Data Centre Pricing in Europe report

For the 2015 edition of this research, the report writer contains a number of new innovations which are listed below:

First, the report writer provides a breakdown of pricing according to the different power that is consumed – with per rack averages per country calculated from 1 kW, 2 kW, 4 kW and 6 kW bundles as well as an overall average. In the report the kiloWatt (kW) metric is used as the standard metric to describe the power bundles that are available.

Second, the report writer has attempted to provide more details of Data Centre pricing according to the specification of each facility using a common industry metric.

The Uptime Institute has developed a metric, which has become the standard method for grading the Data Centre according to specification. Data Centres are classified from grades Tier 1 to Tier 3 under the scheme. This report seeks to use the Uptime Institute grading (Tier 3) as a means of differentiating between the different types of Data Centre available in each country. But although Data Centre providers generally claim a Tier 3 standard for most of their facilities - the standard has not been recognised by the Uptime Institute.

For the purposes of this survey the Premium Data Centre is defined as being at least a Tier 3 grade facility. It should be noted that the Tier 3 grade Data Centre is stated by the operator itself and has not been verified independently.

In practice, only a small minority of Data Centre facilities have been officially certified by the UpTime Institute, so the report writer defines a wider segment for the Premium Data Centre in this report as being:

“A high specification Data Centre facility, which is capable of supporting power per rack of 20 kW as standard, or up to 8 kW per square metre”

In practice there are some facilities that are catering for large bundles of power, which are not Premium Data Centres. For example, a colocation provider with underutilized space, may offer a large bundle of power by spreading the cabinets across a wider area of space, or may use a cabinet with built in supplementary water cooling. The report writer does not include these facilities in the Premium Data Centre segment.

The report writer tracks whether there is a correlation between the price in Euro per square metre of a facility and the specification that is available. In most cases the report writer would expect the high specification facilities to command a higher market price – but this is not always the case.

Data Centre pricing is heavily influenced by local demand and supply factors which results in selected Data Centres in favourable geographical locations, even with low power, being able to charge premium pricing. In some countries, such as the Netherlands, Premium Data Centres do not have premium pricing, due to competition between similar high specification facilities.

Increasingly Data Centres are being designed as “Flexible Data Centres”, with multiple Data halls that can cater for different tier grades, resilience and SLAs to accommodate different customers with different price points.

One of the key trends is the blurring of the traditional distinction between standard Carrier Neutral and Premium Data Centre facilities, as new facilities are being built to cater for a range of different power and tier requirements.

Some Carrier Based Data Centre facilities are also being positioned as Carrier Neutral facilities, with providers such as Colt Telecom and Level 3 claiming that they are carrier neutral, accepting connectivity from a range of telecoms providers, not just their own network service.

The survey provides average pricing per facility type (Carrier Based, Carrier Neutral and Premium Data Centres) and a single overall market average price irrespective of facility type.

Providers can gain an understanding of the average market price in each country as well as the average pricing that is available in each market for a given bundle of space and power.

Scope of the Data Centre Pricing in Europe report

The report is based on a “bottom up” survey of each of the 24 Data Centre country markets in Europe.

For each of the 24 countries surveyed, the country section of the report provides analysis of the following Data Centre issues -

- Key Data Centre statistics for each country which include the following statistics (as of the end of 2015) -
 - o The number of Data Centre providers and facilities
 - o The estimated total raised floor space (technical space) in square metres
 - o The average utilisation of space (per cent)
 - o Average price per standard 19” rack (Euro per month)
 - o Average price per square metre (Euro per month)
 - o Average price per kW (Euro per month)
 - o The range of pricing per kW and also the average bundle price – from 1 kW up to 6 kW per country (Euro per month)

Pricing for rack space, per square metre and per kW (in Euro per month) is also shown in the major Country Markets of the UK, Germany, France and the Netherlands as a weighted average, distinguishing between the largest Data Centre providers from the large number of small Data Centre providers.

As part of each country survey, the following information is included-

- A list of the key Data Centre players for each country
- The key Premium Data Centres available per country (based on a claimed Tier 3 standard)
- The availability of high density or Premium Data Centre facilities for each country
- Pricing for power for each country (including price per rack with kW bundles)
- The Data Centre Business Models that are pursued for each country
- A 5 year forecast for total Data Centre space for each country (from the end of 2015 to the end of 2020)
- A 5 year forecast for total Data Centre Customer Power for each country (from the end of 2015 to the end of 2020)
- A 5 year forecast for standard rack space pricing per month for each country (from the end of 2015 to the end of 2020) – without power
- A 5 year forecast for pricing per square metre per month for each country (from the end of 2015 to the end of 2020)
- A 5 year forecast for pricing per kW per month for each country (from the end of 2015 to the end of 2020)
- A list of assumptions behind the 5 year space and revenue forecast made for each country
- The main trends identified per Country Market

For the capacity and customer power forecasts, the report writer includes capacity or power that is either already built out, or which can be activated to cater for customer use.

Finally, the conclusions section of the report also provides an overview of the main pricing trends taking place across the 24 European countries included in this report – with charts showing the main capacity and price increases or decreases by country – and a ranking of the highest to the lowest per rack and per square metre pricing.

Chapter One: The Data Centre Landscape in Europe as of the end of 2015

Introduction

Below the report writer evaluates the Data Centre Landscape in Europe as of the end of 2015, including the main price trends that are taking place in the European Data Centre market. The core products that are provided by the Carrier Neutral Data Centre in Europe include space – from racks to suites – and Co Location services. Selected specialised Data Centre operators (including Interxion and Equinix) are broadening their existing product range to offer proximity hosting services – and provide co location and low latency connectivity (via third parties) to content, trading and exchange providers.

Although the largest Data Centre providers (such as Equinix, Interxion and TelecityGroup) are providing cloud connectivity services to broaden their product portfolio, at least 80 per cent of their revenues remain dependent on colocation and housing.

Other Carrier Based Data Centres provide a range of managed services, network services and SaaS (Software as a Service) and Cloud services. The Carrier Based Data Centre is having a new lease of life as it becoming the centre for network-based services based on Cloud Computing.

The report writer examines the main core products that are available in the European Data Centre in turn below and comments on the main pricing trends.

Price trends per rack

Pricing per rack is based on a monthly rental charge plus a once-off set up charge. The cost of the set up charge varies by provider, but the average set-up cost is typically around 1.5 times the monthly rental charge.

In some cases Data Centre providers are abolishing once-off installation charges per rack, with Colt and Verizon waiving installation charges as part of a promotional campaign for rack space.

Pricing per standard 19" rack is gradually increasing over time throughout Europe. This reflects the finite amount of capacity that is available and a steady increase in the demand for space.

But although the trend is for price inflation in all markets over time – as providers gradually raise pricing – typically conducting a price review on an annual basis, the average price per facility is impacted by a number of factors which can reduce the overall market average. The average Data Centre price can decline in each country market due to the following factors:

1. **The introduction of new facilities by local Data Centre providers** - who can charge below the average market rate in each country with lower priced rates either for a promotion period or as a permanent feature as a new Data Centre cluster and ecosystem is established.
2. **The introduction of large-scale “campus-style” facilities by providers** - who then charge a discounted rate in order to fill space at a wholesale rate or offer promotional pricing. A new trend is for traditional wholesale Data Centres to offer smaller amounts of space, with Infinity SDC (UK) offering individual rack space (using a third party maintainer) as well as wholesale space.
3. **The sale of existing Data Centre space at cost** – typically by hosting or Co Location providers who have spare space available, with pricing set at a marginal cost which also reduces the average market price (this trend is particularly evident in Italy for example). This can happen for older facilities which have had their original development cost written down, with the report writer finding older Data Centre stock that is being offered with high bundles of power as more space is available.
4. **The introduction of new facilities which are based outside the main urban areas can also result in lower average pricing** - this trend has been evident in France, where Data Centres based in Paris – of whatever standard – charge a price premium when compared with their regional counterparts in cities such as Nice, Brittany or Montpellier. It is also particularly a factor in the UK market, which is becoming less London-based, with space costing less outside the London area. New Data Centre facilities are being established in a range of UK cities including Croydon, Leicester, Birmingham, Leeds, Manchester and Norwich.
5.
6. **The introduction of new campus-based facilities outside of the capital city** - is also happening in the UK, where there has been rapid development of new Data Centre space since 2009 outside of the London M25 ring road area. The introduction of new regional Data Centre space has meant that new space is entering the market at a significant price discount to existing London-based Data Centre facilities, which has meant that the UK market average remains stable over time, with limited scope for price increases (when the currency fluctuations against the Euro are taken into account).

Below is an Appendix which lists the Data Centres that are included in the report by country:

Appendix I: A list of Data Centres that are included in this report by country

The table below provides a list of Data Centres by country that are included in the report.

DATA CENTRE PROVIDER	COUNTRY MARKET
A1 Data Centre	Austria
Anexia	Austria
Conova	Austria
Datasix	Austria
e-shelter	Austria, Germany, Switzerland
EDIS	Austria
HTCC	Austria
Huemer	Austria
Interoute	Austria, Belgium, Czech Republic, France, Germany, Ireland, Italy, Netherlands, Spain, Sweden, Switzerland, UK
Interxion	Austria, Belgium, Denmark, France, Germany, Ireland, Netherlands, Spain, Sweden, Switzerland, UK
IT and Tel	Austria
Mediahaus	Austria
NDC Nexus	Austria
OBBtel	Austria
RIZ IT	Austria
Telia	Austria, Denmark, Finland, Germany, Norway, Poland, Sweden
Verizon	Austria, Belgium, France, Germany, Ireland, Netherlands, Norway, Poland, Spain, UK
VIX	Austria
World4You	Austria
Agility Cofey	Belgium
Antwerp Data Centre	Belgium
Belgacom	Belgium
Brussels Data Centre	Belgium
BT	Belgium, France, Germany, Italy, Netherlands, Spain, UK
Cofely	Belgium
COLT Telecom	Belgium, Denmark, France, Germany, Italy, Spain, Sweden, Switzerland, UK
Datazone	Belgium
DC Buroht	Belgium
DC Ghent	Belgium
DC Oostkamp	Belgium
Foneco Datacenter	Belgium
Hostbasket	Belgium
Etc.	ec

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