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Data Centre Pricing Netherlands 2014 to 2019

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Abstracts

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.

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Contents

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A LIST OF TABLES AND CHARTS USED IN THE REPORT

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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
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

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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
Data Centre Pricing Netherlands – 2014 to 2019 Main Highlights of the Report

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About

A new and updated report from Tariff Consultancy Ltd (TCL) called Data Centre Pricing Netherlands – 2014 to 2019 surveys the key pricing trends in the Dutch Data Centre market, now the 3rd largest country market in Europe behind the UK & Germany, with almost 380,000 square metres of raised floor space by the end of 2014.

With the space available pricing for rack space in the Netherlands remain competitive, with more than 50 Data Centre providers with 117 facilities identified in the report, with some operators offering a rent free period of as much as six months for new rack space orders.

Dutch rack space pricing – without power – is forecast to continue the trend of previous years, which has seen a gradual reduction in average market pricing of 1 to 2 per cent per annum. TCL forecasts that standard retail Dutch average rack space rates will decline to Euro 772 per month as of the end of 2014, and will fall further to Euro 750 per month by the end of 2019, with square metre pricing also exhibiting a similar decline of 3 per cent over the 5 year period.

Although Dutch rack space pricing will decline over time there is to be an increase in overall price levels once power or supplementary facility charges are also included. The average price per kilowatt (kW) in the Netherlands is set to increase by 13 per cent over the same 5-year period from 2014 to 2019 – from Euro 262 per month (2014) up to Euro 296 per month (2019) per kW.

Average Data Centre pricing in the Netherlands will continue to be affected by the introduction of new Data Centre facilities including those being deployed by DRT (Digital Realty Trust), Interxion, KPN, BT Global Services and Global Switch - which alone will launch over 51,000 square metres of new space into the Dutch market from 2014 onwards.

One new trend is for Data Centre facilities to be built outside the Amsterdam area, with Rotterdam alone seeing a cluster of 10 new facilities, but for the most part individual facilities are scattered throughout the Netherlands – and now account for more than half of the market by number of facilities. The new regional facilities typically have lower price points than their Amsterdam counterparts also with discounted pricing.

But the Data Centre facilities based in the Amsterdam area still account for some twothirds of all Dutch raised floor space. They have considerable pricing power based on a high degree of network connectivity with facilities that can cater for high density IT applications and large amounts of power.

The TCL report finds that although there is a considerable range of pricing present in the Dutch market, three main pricing models are being deployed.

For example, selected Premium Data Centres are bundling power and space together to maintain a high price point (with up to 4kW or power included in the standard rack space price). But other providers are offering a relatively low cost rack space rental but are charging a supplementary facility charge to cover for cooling and power costs.

Finally, Data Centre providers are metering power based on a kW per hour charge based on usage, but are charging a surcharge of up to double - or more - of the rate for the basic industrial electricity cost received in the Netherlands – in part as a means of compensating for the reduction in average rack space rentals.

In summary, the Dutch Data Centre market will continue to see investment in new capacity by Carrier Neutral Data Centres, wholesale providers, enterprises, hosting and telecoms providers but the customer demand present will continue to support Data Centre price levels over time.

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