

Data Centre Pricing in Europe 2015 to 2020

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Abstracts

The aim of the latest Data Centre Pricing in Europe report - 2015 to 2020 - is to provide a comprehensive overview of Data Centre Pricing across Europe from more than 750 Data Centre Providers in 24 countries (see coverage below for detailed list of countries covered).

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 2015 - 2020 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

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. Geographical Coverage: 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. Coverage per country. For each of the 24 countries surveyed in the country section of the report TCL provides analysis of the following Key Data Centre statistics for each

country which include the following statistics (as of the end of 2015) -

The number of Data Centre providers and facilities

The estimated total raised floor space (technical space) in square metres

The average utilisation of space (per cent)

Average price per standard 19" rack (Euro per month)

Average price per square metre (Euro per month)

Average price per kW (Euro per month)

The range of pricing per kW and also the average bundle price – from 1 kW up to 6 kW per country (Euro per month)

Contents

A full list of the data Centre operators covered in the report is provided
Comprehensive coverage now including Iceland
Extended 5-year forecast
Only report in the market with comprehensive coverage
Access to Research Analyst following purchase of the Report

About

Data Sources used in the Data Centre Pricing 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 600 separate Data Centre providers from TCL's updated database, with the remainder from public sources including company annual report and accounts.

It should be noted that although there are over 600 Data Centre providers included in the research, the actual number of facilities is considerably higher – at over 1,200 facilities - as several providers have multiple facilities with pricing that is facility-specific. TCL estimates that there are now 1,227 third party Data Centre facilities identified across the 23 European markets in total.

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 – TCL 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 TCL does disclose the pricing in the report.

TCL 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. In the report TCL provides examples of rack space pricing bundled with a number of different per kW rates which are provided by the Data Centre operators.

To calculate the price market averages TCL 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 TCL 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, TCL received industrial electricity pricing from the Swiss Federal Statistical Office.

Innovations for the 2013 edition of the Data Centre Pricing in Europe report For the 2013 edition of the report TCL contains a number of new innovations which are listed below - First, TCL 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, TCL 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 I to IV under the scheme. In this report TCL 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.

For the purposes of this survey the Premium Data Centre is defined as being 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.

The intention is to track 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 TCL would expect the high specification facilities to command a higher market price – but

this is not always the case due to 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.

But in the TCL analysis the aim has been to provide an average price per facility type as well as provide a single overall market average price irrespective of facility type.

Providers can therefore gain an understanding of the average market price in each country as well as understand the average pricing that is available in each market for a given bundle of space and power – and Data Centre facility specification.

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