

# PREMIER COLOCATION REPORT

CBRE has created the sector's Premier Colocation Report to provide the most in-depth market analysis in Europe.

The report provides access to quarterly information across key metrics covering the FLAP Markets – Frankfurt, London, Amsterdam & Paris.

### HIGHLIGHTS

- The **most accurate and up-to-date European market statistics**, which we collect through engagement with operators and physical inspections of facilities each quarter.
- Having the sector's **longest time-series** of market information **allows more accurate forecasting**. Our specialist research team has been collecting European market data since 1999.
- **Predictive analysis and forecasting** of key market data, including supply, take-up, vacancy and pricing, using our demand model to provide forward looking views on the key metrics.
- **Pipeline of all the individual facilities** due to come to market in the next two years.
- **Detailed pricing analysis** broken down by market in 4-sized categories covering retail, wholesale and hyperscale.
- Specialist **Occupier and Investor focus sections**; insight and commentary of key trends and specific transactions from our industry experts.
- Data broken down by **wholesaler and retailer split** where appropriate and with **data tables available** for in-house analysis and design.

### IN FOCUS

- Supply (including pipeline)
- Availability
- Absorption
- Take-Up
- 'Hot spot' maps
- Pricing
- Specialist Occupier Focus
- Specialist Investment Focus
- Two-year projections
- Time-series

DETAILED BREAKDOWN  
ON NEXT PAGE

£3,500  
Single Market  
(Four Quarters)

£9,950  
Four Markets  
(Four Quarters)

£2,000\*  
Optional Four  
Hours Analyst  
Time

\*1/3 saving

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## Detailed report contents

CONTENTS		FREE MARKETVIEW	PREMIER SUBSCRIPTION
Supply	Aggregated, annual and YTD – chart	✓	✓
Let and available capacity	Aggregated, annual and YTD – chart	✓	✓
Take-up	Aggregated, annual and YTD – chart	✓	✓
High-level aggregated market commentary and quarterly highlights		✓	✓
<b>Key Metrics</b>			
Key Metrics	By market, current quarter – table		✓
Supply	By market, annual and YTD – chart		✓
Let and available capacity	By market, annual and YTD – chart		✓
Take-up	By market, annual and YTD – chart		✓
Net absorption	By market, annual and YTD – chart		✓
Supply projection, 2 years	By market, annual – chart		✓
Availability projection, 2 years	By market, annual – chart		✓
Take-up projection, 2 years	By market, annual – chart		✓
Market balance analysis	By market, annual and YTD – chart		✓
Supply pipeline, 2 years	By market – table		✓
Market Map: key colocation hot spots in the market	By market – map		✓
Colocation pricing	By market, annual and YTD – table		✓
Detailed market-specific commentary and quarterly highlights			✓
<b>OCCUPIER FOCUS</b>			
Occupier take-up review & trends			✓
Colocation pricing analysis			✓
Leading market focus			✓
<b>INVESTMENT FOCUS</b>			
Corporate M&A tracker			✓
M&A market commentary			✓
Investment market commentary			✓
+ All charts and data available by individual market			✓
+ Data table with time series available for all charts			✓
+ Wholesaler and retailer split where appropriate			✓
+ Data tables available in Excel for in-house design and analysis			✓

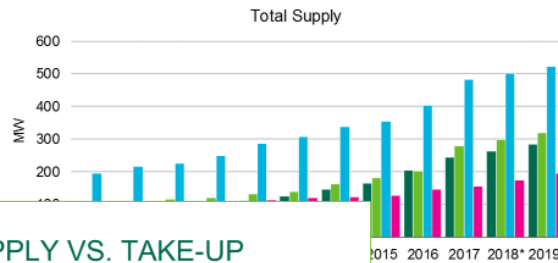
# Sample report contents (example)

## KEY STATISTICS

		Supply (MW)	Availability (MW)	Net Absorption (years)	Take-up, Quarterly (MW)	Take-up, Year to Date (MW)
Amsterdam	Q4 2017	244	45	1.8	2.7	20.9
	Q4 2016	204	21	1.2	44.0	53.6
Frankfurt	Q4 2017	279	69	3.7	12.1	31.9
	Q4 2016	203	27	2.0	3.8	34.2
London	Q4 2017	482	97	3.4	12.7	53.5
	Q4 2016	404	71	3.2	20.4	49.2
Paris	Q4 2017	156	21	2.0	5.9	12.8
	Q4 2016	146	23	2.6	6.6	17.6
European Total	Q4 2017	1,160	232			
	Q4 2016	958	142			



## FLAP MARKETS SIZE



This chart shows the market sizes of the four FLAP cities.

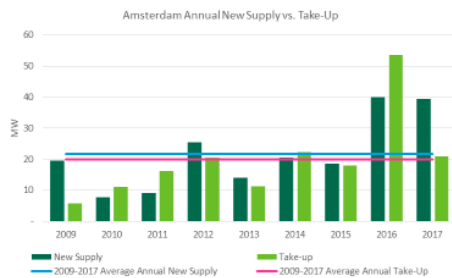
CBRE has projected market growth by identifying schemes that are due to come online in the next two years. Schemes that are planned but uncertain in their timing have been excluded and will be included when they are further in their development process.

\*2018 and 2019 projections in this chart are arbitrary – figures will be released on subscription.

	2013	2014	2015	2016	2017	2018*	2019*
London	146	164	204	244	264	284	284
Frankfurt	164	181	203	279	299	319	319
Amsterdam	337	354	404	482	502	522	522
Paris	125	127	146	156	176	196	196
Total	771	827	958	1,160	1,240	1,320	1,320

CBRE DATA CENTRES

## AMSTERDAM ANNUAL NEW SUPPLY VS. TAKE-UP



Annual new supply and take-up in the Amsterdam market has been well balanced over the long-term despite volatility in individual years

	2009	2010	2011	2012	2013	2014	2015	2016	2017
New Supply	19.6	7.7	9.1	25.5	14.1	20.5	18.6	40	39.5
2009-2017 Average Annual New Supply	21.6	21.6	21.6	21.6	21.6	21.6	21.6	21.6	21.6
Take-up	5.7	11.1	16.1	20.6	11.3	22.3	17.9	53.6	20.9
2009-2017 Average Annual Take-Up	19.9	19.9	19.9	19.9	19.9	19.9	19.9	19.9	19.9



## FRANKFURT COLOCATION PRICING

Frankfurt (EUR)	2015 H2	2016 H2	2017 H2	2018 H1	2018 H2	2019 H1
50kW	Redacted	Redacted	Redacted	Redacted	Redacted	Redacted
250kW	Redacted	Redacted	Redacted	Redacted	Redacted	Redacted
500kW	Redacted	Redacted	Redacted	Redacted	Redacted	Redacted
1MW	Redacted	Redacted	Redacted	Redacted	Redacted	Redacted

### Pricing Notes

- Price indicates EUR per low per month
- Price assumes 3% annual uplift
- Investment grade covenant strength
- Prices exclude power consumption
- Price excludes all additional services and cross connects
- Pricing broadly related to 5-year term.
- Pricing excludes rates offered to secure 'strategic' deals, such as to hyperscale cloud customers.
- Pricing is expressed at the time recorded, not adjusted for inflation.

Pricing bands redacted – available upon subscription



## Our EMEA Data Centre Advisory & Transaction Service Lines



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Reports will contain views and forecasts from CBRE's 12-person EMEA Data Centre Solutions team, including the use of the CBRE proprietary demand model. We will not provide any client-confidential information.

