

DATA CENTRE MARKETBEAT

Autumn 2019



CUSHMAN & WAKEFIELD

AMSTERDAM

MARKET OVERVIEW

Amsterdam received two recent market upheavals, the first being the decision by the municipality of Amsterdam to restrict the development of any further data centre development approvals throughout the metropolitan area. While couched in the language of supporting other business sectors, the reality is that the area is largely out of available power and risks disturbing local supply. New regulations are in development, with requirements planned around green energy use and utilization of waste heat for residential purposes. No further data center development is allowed to launch before year-end, with the expectation that the regulations will be ready for the industry for 2020. Projects currently underway will be allowed to complete, with seven operators working on finishing expansions over the next two quarters.

The second major upheaval was the recent signing by Digital Realty to acquire locally-based and publicly-listed Interxion. The deal values Interxion at €7.6 billion, and takes Digital Realty from a player in major markets to a juggernaut across the continent with well over 400 MW of capacity either operational or under construction. Amsterdam will become the second largest market in Europe for the combined entity with 100 MW of power, and all current projects for both companies will continue through to completion. When consummated, this acquisition will be the largest in the history of the data centre industry and provides further competition to the major recent investment across the Equinix platform.

CONSTRUCTION UPDATE

OPERATOR	LOCATION	SIZE (SQM)	POWER (MW)	STAGE / EST. DELIVERY
Datacenter.com	AMS1	1,800	1.5	Completed / Q4 2019
Dataplace	Amsterdam	2,250	3 (est)	Under Construction / Q4 2019
Interxion	AMS10 Phase 1	2,700	3.23	Under Construction / Q4 2019
	AMS10 Phase 2	4,100	5 (est)	Under Construction / Q1 2020
	AMS10 Phase 3	2,700	3.23 (est)	Under Construction / Q3 2020
Digital Realty	Amsterdam	3,486	5	Under Construction / Q4 2019
Iron Mountain	AMS-1 Phase 2	1,029	1	Under Construction / Q1 2020
Equinix	AM4 Phase 3	1,721	2 (est)	Under Construction / Q1 2020
CyrusOne	Amsterdam I	3,623	4	Under Construction / Q1 2020
Cyxtera	Polanen Park	2,694	3	Under Construction / Q1 2020

MORE INFORMATION:

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UNDER CONSTRUCTION

30 MW

ECOSYSTEM DEVELOPMENTS

- The **Open Compute Project Experience Center (OCP)** has relocated to the maincubes AMS01 data centre, with plans of developing open source data centre designs. OCP is funded by a variety of compute giants, including Facebook and Intel.
- Cloud storage firm **Backblaze** has opened their first data center in Europe, choosing Amsterdam to join US locations in Sacramento and Phoenix. Backblaze offers a variety of storage and backup solutions for both individuals and companies.
- **ServerFarm** completed the acquisition of 5NINES Global, leading to the takeover of a 194,000-square-foot data center. The newly-renamed AMS1 offers 20 MW of available power and represents a new market for the operator.
- **Leaseweb** signed on for space in maincubes AMS01, adding the third location locally for the colocation and services provider.
- **Microsoft** has announced a new Azure edge site launching in Amsterdam, providing less latency for local users of its cloud services suite.
- **Oracle** has also announced local availability for its cloud suite, with Amsterdam joining Newport as the two newest European locations for this year.

GLOBAL DATA CENTER ADVISORY GROUP

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