

# DATA CENTRE ADVISORY GROUP

## INTRODUCING OUR EMEA CAPABILITIES

Better never settles



# INTRODUCTION WHO WE ARE

At Cushman & Wakefield (C&W), we're dedicated to shaping a better future for our clients, communities, and the planet. In today's digital era, where data serves as the catalyst for innovation, communication, and collaboration, data centres are crucial to our interconnected world. They facilitate the storage, processing, and dissemination of vast amounts of information globally. Therefore, our mission is twofold: to advance our clients' objectives while championing societal and environmental change.

As a leading boutique advisor for data centre solutions in EMEA, we take pride in our ability to blend unparalleled expertise, market insight, and global reach. Our team is dedicated to delivering tailored solutions for clients across investors, developers, occupiers, and operators. From navigating the complexities of site selection and acquisition to providing nuanced insights on valuation, leasing, and market trends, we offer comprehensive guidance to our clients in navigating the dynamic and complex landscape of the data centre market.

At the heart of our endeavours lies a commitment to creating value for our clients while fostering positive societal and environmental impact. Upholding the highest standards of ethics and integrity in every element of our operations, we prioritise diversity, equity, and inclusion within our organisation. By embracing a multitude of perspectives, we are better equipped to craft innovative solutions and strategies tailored to your unique needs.

Aligned with the United Nations Sustainable Development Goals and the Paris Agreement on climate change, we are wholeheartedly committed to reducing the environmental footprint of every data centre operation we're involved in, whether directly or indirectly influenced. We therefore invite you to explore our brochure and learn more about our EMEA data centre team, as we stand ready to collaborate with you in achieving your goals.

## AWARDS & RECOGNITION



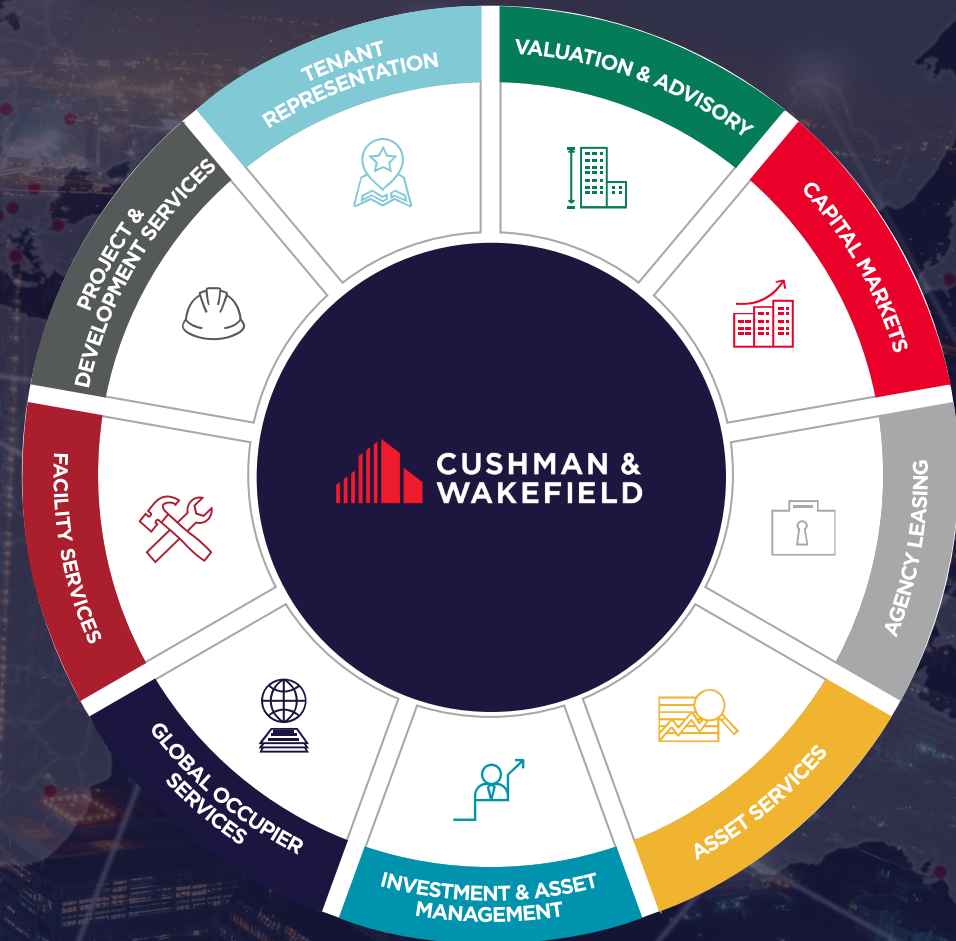


# CONFIDENTLY GLOBAL, EXPERTLY LOCAL

## CUSHMAN & WAKEFIELD (C&W)

C&W (NYSE: CWK) is a leading global commercial real estate services firm for property owners and occupiers with approximately 52,000 employees in nearly 400 offices and 60 countries.

In 2023, the firm reported revenue of \$9.5 billion across its core services of property, facilities and project management, leasing, capital markets, and valuation and other services. It also receives numerous industry and business accolades for its award-winning culture and commitment to Diversity, Equity and Inclusion (DEI), sustainability and more. For additional information, visit [www.cushmanwakefield.com](http://www.cushmanwakefield.com).



**\$9.5B\***

2023 revenue  
\*USD

**6.2B**

SF managed

**400**

offices  
(approx.)

**52,000**

employees  
(approx.)

**60**

countries  
(approx.)



# GLOBAL DATA CENTRE ADVISORY

## GLOBAL DATA CENTRE ADVISORY GROUP

No matter if it's just land or a multitude of assets, we excel at maximizing its potential. Our team of specialists covers a wide array of sectors including office spaces, retail, industrial & logistics, and data centres.

Operating seamlessly as one cohesive unit, our **Global Data Centre Advisory Group** ensures regional and global collaboration. This unified approach enables us to offer consistent and efficient service delivery models for data centres across EMEA, providing our clients with enhanced and integrated solutions.

01

### ADVISORY LED APPROACH

Helping our clients turn data into insights, and insights into action. We also ensure confidentiality when dealing with sensitive information.

02

### OPERATIONAL EFFICIENCY

We work as a global team which creates operational efficiencies in delivering for our clients.

03

### CONNECTIVITY & COOPERATION

Cross-regional and global platform to reflect the way clients are increasingly procuring data centre services.

04

### CLIENT COVERAGE

Account-based approach to create significant value and exceptional experience for our clients.

## REGIONAL DATA CENTRE ADVISORY

### EMEA KEY CONTACT



#### ANDREW FRAY

International Partner,  
Head of EMEA Data Centre  
Advisory,  
London

### AMERICAS KEY CONTACT



#### JESSICA HOWE

Vice President,  
Global Growth  
Verticals

### ASIA PACIFIC KEY CONTACT



#### VIVEK DAHIYA

Head of Asia Pacific  
Data Centre  
Advisory



# EMEA DATA CENTRE ADVISORY

As part of our Global Data Centre Advisory Group, our EMEA Data Centre Advisory team is dedicated to delivering tangible results for both global and national clients. Our multidisciplinary team of experts from various advisory backgrounds and geographies combines local knowledge with sector-specific insight and contacts. We have the experience to support and manage investment decisions made by enterprises, colocation providers, hyperscalers, sector investors and developers.

## OUR CORE EMEA DATA CENTRE TEAM



**ANDREW FRAY**

International Partner,  
Head of EMEA Data Centre Advisory,  
London

Andrew is a highly experienced data centre professional and is the former Managing Director at Interxion UK, now Digital Realty Trust, where he ran the key Hanbury Street site. He also served as Board Member of Telehouse Europe, part of KDDI, the global Japanese telco.

Andrew heads up the EMEA Data Centre Team. The team covers land transactions, colocation advisory and capital markets for the sector with each of these elements underpinned by strong valuation, data analytics and research functions.

[More info on LinkedIn](#)



**LAURA SHEPHERD**

Revenue Enablement  
Director, London



**TOM OWEN**

Partner,  
Land Transactions,  
Düsseldorf



**ANDRAS LONGAVER**

Senior Data &  
Operations Manager,  
Budapest



**MATYAS TAMAS FAZEKAS**

Research Analyst,  
Data Centre Advisory



**ADAM COOKSON**

International Partner,  
Head of Land Transactions,  
Birmingham

Adam is a highly experienced leader, with a track record of delivering complex transactions and major international acquisition and divestment programs. He brings a balanced perspective on how real estate services are delivered, having worked both as a client and a service partner.

Adam has overseen over 65 land transactions on an exclusive basis across the EMEA region and beyond.

[More info on LinkedIn](#)



**OLIVER PETCH**

Associate,  
Land Transactions  
Manager, London



**HENRY GORE**

Surveyor,  
Birmingham



**LOTTIE TOLLMAN**

International Partner,  
Head of Occupier Representation,  
London

Lottie has 16 years real estate experience and is dedicated to data centre colocation and capital markets. She has a background in delivering high-density colocation deployments around EMEA.

Lottie has a background in Operations, International Valuations and is a PRINCE 2 qualified project manager. She has worked across multiple asset types and countries and additionally has c-suite experience in relation to merger and acquisition activities.

[More info on LinkedIn](#)



**ALINA STETSIUK**

Consultant,  
Land Transactions,  
Düsseldorf

CLICK ON UNDERLINED  
NAMES TO EMAIL THEM



# EMEA IN-COUNTRY DATA CENTRE REPRESENTATIVES

Our EMEA Data Centre Advisory team is supported by in-country teams who work with the central data centre team to manage and deliver work locally:

 <b>AUSTRIA</b> NIKOLAUS KLARITSCH	 <b>FINLAND</b> JUUSO PIETILÄ	 <b>ITALY</b> ALESSANDRO GAZZARI	 <b>SPAIN</b> PERE MORCILLO
 <b>BELGIUM</b> BART VANDERHOYDONCK	 <b>GERMANY</b> TOM OWEN	 <b>NETHERLANDS</b> PAUL SMOLENAERS	 <b>SWEDEN</b> GUSTAF BENNDORF
 <b>CZECH REPUBLIC</b> MICHAL KORENSKY	 <b>GREECE</b> IOANNA PALIVOU	 <b>NORWAY</b> MARIUS GUSTAV DIETRICHSON	 <b>SWITZERLAND</b> ANNE-PASCALE MARCHAND
 <b>DENMARK</b> NATALIE KIELER KVAM	 <b>IRELAND</b> BRENDAN SMYTH	 <b>POLAND</b> KAMIL ZACH	 <b>TÜRKIYE</b> TUGRA GONDEN
 <b>FRANCE</b> GEOFFREY SWARTZ ORIOU	 <b>ISRAEL</b> AMY LINK GIVATI	 <b>PORTUGAL</b> SERGIO NUNES	 <b>UAE &amp; SAUDI ARABIA</b> CHARLIE SARGENT
		 <b>SOUTH AFRICA, KENYA &amp; NIGERIA</b> CALVIN CRICK	 <b>UNITED KINGDOM</b> DAVID BINKS

## OUR PARTNERS

Our Global Data Centre Advisory Group partners with industry experts to ensure we provide focused and specialist knowledge for specialist fields. We work with our partners to provide: Fibre Advisory, Power Advisory, Legal Advisory, M&E Consultancy & Test Fits, Architectural services, Sustainability/Ecology (Environmental, Water, Carbon), Decontamination, Zoning & Planning, Technical Due Diligence & Inspection, Capex Estimation.



# EMEA DATA CENTRE SERVICES

Our EMEA Data Centre Advisory Team, as part of our global Data Centre Advisory Group (DCAG), has created optimal solutions and location strategies to address highly complex IT requirements for enterprise clients across the region and globally.

Our multi-disciplined team, consisting of experts across a spectrum of advisory services, focus specifically on the data centre market for seamless delivery. Every client requirement is unique; we have the experience to develop long-term strategies that drive wise investment decisions for enterprise users, colocation providers, hyperscalers, sector investors and developers.

## CLIENT TYPES

- /// ENTERPRISE USERS
- /// COLOCATION PROVIDERS
- /// HYPERSCALERS
- /// SECTOR INVESTORS
- /// SECTOR DEVELOPERS

## PROJECT & DEVELOPMENT SERVICES

- Project & Construction Management
- Technical due diligence
- Building Consultancy
- Dilapidations

## LAND ACQUISITIONS & DISPOSALS

- Powered land acquisition / Build to Suit
- Location advisory
- Promotion and Sale of land for DC use

## VALUATION & ADVISORY

- Single asset appraisal
- Portfolio valuation
- Valuation for financial reporting

## CAPITAL MARKETS & ADVISORY

- Acquisition, sale & leaseback
- Valuation and strategic advisory

## INTEGRATED PORTFOLIO MANAGEMENT

## CONSULTING & ADVISORY

- Global DC market database
- Bespoke market reports
- Location Advisory/Strategy
- Feasibility studies / Highest & Best use assessments
- Go to market / Market Entry Strategies
- Decision support analysis

## FACILITIES MANAGEMENT

## COLOCATION

- Occupier representation
- Operator/site promotion
- Lease advisory
- Lease administration

## POWER & FIBRE ADVISORY

## SUSTAINABILITY & CLIMATE RISK

- Sustainability Strategy
- Enabling compliance
- Managing climate risk
- Driving operational efficiency
- Demonstrating impact
- Delivering net zero



# LAND ACQUISITIONS & DISPOSALS

Data centre land transactions are pivotal for shaping tomorrow's digital infrastructure. Whether expanding or optimizing, strategic decisions regarding land are paramount. Our specialized Data Centre Advisory team excels in facilitating seamless transactions tailored to your specific needs. Leveraging extensive market knowledge and industry insights, we guide you from site selection to negotiation and finalization.

For those acquiring land, we identify prime locations aligned with your operational requirements and growth projections. Through meticulous analysis, we ensure regulatory compliance and maximize scalability and efficiency. Conversely, if disposing of excess land or optimizing assets, our strategic approach unlocks value and streamlines your portfolio. Due to the scale of these we often work carefully with you to build a compelling Information Memorandum to bring to market or respond to buying opportunities. We assess market dynamics, evaluate potential buyers or lessees, and devise tailored marketing strategies for optimal returns. Our focus remains on delivering tangible results and maximizing value, empowering data centre operators, investors, and developers to thrive in the evolving digital landscape.

## SERVICES INCLUDE

- Market analysis and site selection
- Due diligence
- Financial analysis and feasibility studies
- Transaction negotiation and structuring
- Land use planning and permitting
- Environmental and sustainability consulting
- Tax and incentive advisory

## HOW WE ARE PAID

- Initial consultancy fee
- Transaction fee as a % of sale price

## LAND TEAM



**ADAM COOKSON**

International Partner, Head of Land Transactions, Birmingham



**TOM OWEN**

Partner, Land Transactions, Düsseldorf



**OLIVER PETCH**

Associate, Land Transactions Manager, London



**ALINA STETSIUK**

Consultant, Land Transactions, Düsseldorf

**In the last 4 years we have acquired 3.7GW of powered land**





## LAND TRANSACTIONS PROOF POINTS

### CLOUD SERVICE PROVIDER

<b>Location</b>	Warsaw, Poland
<b>Service</b>	Land Acquisition
<b>Size</b>	180,000 sqm

Utilized our expert local resources to fully canvass the Warsaw market over a period of 2 years to find and negotiate the purchase of land for new data centre development. Our team's intricate knowledge of local landowners and development players combined with our ability to assist the client with internal and external stakeholder management was key to a successful outcome.

### CLOUD SERVICE PROVIDER

<b>Location</b>	Johannesburg, South Africa
<b>Service</b>	Land Acquisition, Valuation
<b>Size</b>	130,000 sqm

The client exclusively appointed C&W to source suitable greenfield sites in Johannesburg for their data centre expansion. We undertook a full canvass of the Johannesburg market to shortlist sites suitable for near-term development. C&W was able to unlock a key parcel by structuring the deal to include the fulfilment conditions enabling our client to take possession of a serviced site.

### CONFIDENTIAL

<b>Location</b>	Oxfordshire, UK
<b>Service</b>	Land Disposal
<b>Power</b>	1.4GW
<b>Size</b>	158,000 sqm

Ongoing land sale with 1.4 GW power capacity and 30 hectares of net development land. Marketed off-market to 10 selected operators, this site has the potential to become Europe's largest data centre campus. The land value has increased fivefold and is currently under offer, with closing anticipated in Q4 2024.

### CLOUD SERVICE PROVIDER

<b>Location</b>	Greece
<b>Service</b>	Land Acquisitions (x3)
<b>Power</b>	38MW
<b>Size</b>	271,000 sqm

Our client entered the Greek market by purchasing 3 land parcels for data centre development, with an investment expected to be around 1 billion euros. C&W exclusively assisted these acquisitions. Due to the lack of large single-location sites in Athens, we had to assemble them. The sites required suitability and approval for data centres, with complex power and fibre optic routes, in a market with deficient urban planning and technical frameworks. All prerequisites were discussed with relevant parties and authorities.

### CONFIDENTIAL

<b>Location</b>	Madrid, Spain
<b>Service</b>	Land Disposal
<b>Power</b>	40GW
<b>Size</b>	22,000 sqm / 2.2 Ha

2.2 Hectares data centre development site, with 40MW power connection. Currently running a structured sale process and anticipate closing a sale in 2024.

### HARWORTH GROUP

<b>Location</b>	Leeds, UK
<b>Service</b>	Land Disposal
<b>Power</b>	120MW
<b>Size</b>	48 acres

C&W represented the Harworth Group to sell the former Skelton Grange B Power Station (along with the adjacent 'Knostron' plot) to Microsoft for a total consideration of £120m. Microsoft are intending to build a 120MW data centre campus of c1.3m SF across the 2 plots.

### CLOUD SERVICE PROVIDER

<b>Location</b>	Madrid, Spain
<b>Service</b>	Land Acquisition
<b>Size</b>	97,000 sqm

As part of an ongoing search mandate with our expert Madrid-based team we were able to secure this prime data centre site for our client following complex negotiations in a market which has seen a high level of competition.

### GLOBAL FINANCIAL SERVICES ENTERPRISE

<b>Location</b>	Nottingham, UK
<b>Service</b>	Land Disposal
<b>Power</b>	17MW
<b>Size</b>	2.4 ha

Edge Data Centre for sale, with a potential capacity of 17MW. Ideal for edge investors or operators, this legacy data centre offers robust connectivity.



# COLOCATION

We provide a range of colocation services from Occupier Representation, Operator/Site promotion and Lease Advisory / Lease administration.

Our colocation and leasing services cater to customers seeking flexible infrastructure solutions. At C&W, we specialize in comprehensive advisory services tailored to colocation providers and customers.

For colocation providers, we optimize facility utilization, guide on appropriate marketing and ultimately, attract customers, leading on negotiations.

Customers benefit from our expertise in identifying suitable facilities, negotiating lease terms, and ensuring seamless integration with their IT infrastructure. We evaluate options, conduct due diligence, and negotiate agreements to meet specific requirements.

Investors rely on our market insights and transaction expertise to identify opportunities, assess risks, and maximize returns. We provide guidance throughout the investment lifecycle to optimize asset performance and enhance portfolio value.

C&W is your trusted partner in navigating the complexities of colocation and leasing, delivering value and driving success in the real estate data centre market.

## SERVICES INCLUDE

- Occupier representation
- Lease Advisory
- Exit Strategy
- Operator/site promotion
- Lease administration
- Strategic asset analysis
- Positioning and marketing plans
- Marketing brochures and materials, property fact sheets, tour books
- Prospective tenant analysis and canvassing

## HOW WE ARE PAID

- Consultancy fee
- % of rental fee paid by landlord or operator

## COLOCATION TEAM



**LOTTIE TOLLMAN**

International Partner, Head of Occupier Representation, London



**ANDREW FRAY**

International Partner, Head of EMEA Data Centre Advisory, London



**HENRY GORE**

Surveyor, Birmingham





## COLOCATION PROOF POINTS

### HYPERSCALER CAMPUS

<b>Location</b>	Portugal
<b>Service</b>	Colocation
<b>Power</b>	3MW

High performance compute customer deployment placed. The team gathered various offers from the market for the client to benchmark, ultimately selecting the site based on securing competitive lease terms while prioritising renewable and affordable energy pricing.

### HYPERSCALER

<b>Location</b>	Norway
<b>Service</b>	Colocation
<b>Power</b>	6.8MW

The team's facilitation of the placement of two 3.4MW AI deployments into a facility in Norway represents a significant colocation project. The successful transaction was underpinned by their expertise in AI deployment and their dedication to meeting client's objectives. Their tailored approach ensured the successful introduction of the client to a new market having provided comprehensive insights into the local business landscape.

### PROMINENT AMSTERDAM DATA CENTRE OPERATOR/ DEVELOPER

<b>Location</b>	Amsterdam
<b>Service</b>	Colocation
<b>Power</b>	4MW

Private cloud customer deployment placed at this new facility in the heart of Amsterdam. Drawing upon their extensive experience and fortified by a strong relationship with the operator, the team negotiated favourable terms, ensuring optimal conditions for the client's operations and for the Operators lease up ambitions.

### GLOBAL BANK

<b>Location</b>	US
<b>Service</b>	Colocation / Lease Advisory
<b>Power</b>	500kW

Our team was asked to review an existing long-term lease on a mission-critical colocation site. The work included reviewing the existing lease, renewal options, benchmarking pricing and sourcing alternative locations with power, connectivity, resilience, latency, service and ESG criteria taken into account. The result was a cost-saving proposal to support a 'Go / No Go' decision.

### MAJOR LONDON DATA CENTRE OPERATOR/ DEVELOPER

<b>Location</b>	London, UK
<b>Service</b>	Colocation
<b>Power</b>	2MW

Discussions have recently concluded to place a deployment exceeding 2MW in London, to be hosted at a prime facility. Leveraging their expertise and robust partnerships, the team has been able to prioritise rapid deployment while achieving strong negotiations.

### GLOBAL MEDIA CLIENT

<b>Location</b>	London, UK
<b>Service</b>	Colocation
<b>Power</b>	300kW

C&W were asked to source a highly connected data centre to house a virtual editing suite and streaming service. We supported the evaluation of 10 different data centres in the London area, conducted inspections, selected candidates, negotiated Heads Of Terms, layouts and set-up capex.

### GLOBAL BANK

<b>Location</b>	Paris, France
<b>Service</b>	Colocation / Lease Advisory
<b>Power</b>	<1MW (Disaster Recovery)

C&W were asked to evaluate the relocation of a disaster recovery data centre and associated office space within the Paris region with very precise set of requirements and very tight timescales owing to a lease termination event. The Team reached out to senior-level operator relationships to source options, costs and contractual terms.

### INTERNATIONAL BANKING CLIENT

<b>Location</b>	London, UK
<b>Service</b>	Renewal
<b>Power</b>	50kW

The team achieved a successful contract extension for this International bank, spanning a 2-year term with a capacity of 50kW. Through swift negotiations, they secured favourable terms for the client upon renewal and provided valuable benchmarking data to enable informed decision-making.



# CAPITAL MARKETS

Our Capital Market services offer specialized expertise to investors, developers, and operators navigating this dynamic sector. At C&W, we provide tailored advisory services to optimize investment strategies, facilitate transactions, and maximize returns.

Our team excels in guiding clients through data centre investments, mergers and acquisitions, and financing solutions. Leveraging deep market knowledge, we identify lucrative opportunities, assess risk profiles, and devise strategies to meet financial objectives.

Whether diversifying portfolios or securing financing for new projects, we offer end-to-end support. From feasibility studies to deal structuring and negotiation, we ensure successful outcomes.

With a focus on innovation and client satisfaction, we're trusted advisors in real estate data centres. Our commitment empowers clients to navigate capital markets confidently, achieving their investment goals in this rapidly evolving landscape.

## SERVICES INCLUDE

- Acquisition, sale & leaseback
- Valuation and strategic advisory
- Investment Sales – property positioning that drives financial results
- Equity, Debt & Structured Financing - access to opportunities, capital sources and local market expertise

## HOW WE ARE PAID

- Consultancy fee
- Success fee (% of transaction)

## CAPITAL MARKETS TEAM



### [ANDREW FRAY](#)

International Partner,  
Head of EMEA Data Centre  
Advisory, London



### [LOTTIE TOLLMAN](#)

International Partner, Head of  
Occupier Representation,  
London



### [MACIEJ GROCHOWSKI](#)

Associate, Corporate Finance  
Advisory, Global Occupier  
Services, London





## CAPITAL MARKETS PROOF POINTS

### COMPUTER TECHNOLOGY COMPANY

<b>Location</b>	Scotland
<b>Service</b>	Sale and Leaseback
<b>Power</b>	4MW

Overseeing the sale and leaseback of an existing 4MW data centre in Scotland. The process involves preparing for the sale by working closely with the client, identifying potential purchasers globally, conducting the bidding process, and coordinating due diligence to achieve the best price. The transaction is expected to close later this year.

### FOOD & BEVERAGE COMPANY

<b>Location</b>	Switzerland
<b>Service</b>	Disposal
<b>Power</b>	10-40MW
<b>Size</b>	40,000 sqm

We oversaw the disposal collaborating closely with our affiliate. The site already had a capacity of 10MW, with the potential to expand up to 40MW. Our advice to the client covered several possibilities, and thus included a diverse range of target types:

- Continuing the existing mixed use as offices and a data centre.
- Converting the existing buildings into a data centre.
- Transforming the entire site into a hyperscale or colocation data centre.
- Exploring office space or other redevelopment options. Considering hybrid solutions.

Our efforts ultimately resulted in a successful disposal which satisfied our clients core outcomes.

### INVESTMENT FIRM

<b>Location</b>	Ireland
<b>Service</b>	Disposal
<b>Power</b>	5MW

Collaborated closely with the client, to ensure a successful transaction. The goal was to identify potential purchasers without disrupting operations for the existing client base and handling the process confidentially. Through effective collaboration, strategic prospecting, and thorough due diligence, we a successful transaction was achieved.

### FINANCIAL COMPANY

<b>Location</b>	Nottingham
<b>Service</b>	Consultancy
<b>Power</b>	4MW
<b>Size</b>	70,000 sqm

We consulted on divestment options for a 4MW DC facility with potential for power expansions. The primary option was a Sale & Leaseback arrangement, which allowed the client to enhance its balance sheet position. This strategy enabled stakeholders to conduct a robust business case analysis in line with their long-term real estate strategy objectives.

### INVESTMENT MANAGEMENT FIRM

<b>Location</b>	London
<b>Service</b>	Consultancy
<b>Power</b>	4.45MW

Advised on the acquisition of two prominent data centre facilities in London Docklands. Together, these properties form a data centre campus with a capacity of 4.45MW, let solely to a leading data centre operator. This collimated in the purchaser's first investment into data centres.

### GLOBAL DC OPERATOR

<b>Location</b>	Manchester
<b>Service</b>	Purchase
<b>Power</b>	N/A
<b>Size</b>	15,000 sqm

We facilitated the purchase of investment premises in Manchester on behalf of a prominent data centre operator and developer. We aligned the client's requirements with a suitable asset that could be repurposed. The investment was primarily in an office building. We provided strategic advice on managing the occupation status of the building to not only achieve vacant occupation but also optimise income. All these efforts were made while ensuring that a 'go-live' date could be met.



# RESEARCH & CONSULTANCY

Cushman & Wakefield is a leader in providing globally consistent market data, analysis and thought leadership with quality market intelligence released regularly each year. We have several signature reports that will provide data centre operators, developers and investors useful insights.



## Global Data Centre Market Comparison

*(Annual publication)*

Our annual Global Data Centre Market Comparison assesses over 92 global primary and emerging data centre markets utilizing 14 criteria, including fibre connectivity, market size, cloud availability and others, to determine the top overall markets at a global and regional level, along with the top performers in each category.

## EMEA Data Centre Market Updates

*(Biannual publication)*

This biannual update released at the end of H1 and H2 of each year, provides a comprehensive summary of EMEA's data centre market. It features our EMEA Data Centre Market Maturity Index that forecasts the potential evolution of primary and secondary markets across the region and gives in-depth analysis for notable markets.

## Consulting & Advisory

*(Client led)*

We can offer data centre consultancy to produce bespoke market and insight reports for clients, as well as location strategy reports. Our data centre market database covering 92+ markets allows for supply/demand forecasting and decision support analysis to help craft your business strategies. We work towards creating advanced business solutions.

### RESEARCH & CONSULTANCY TEAM



**LAURA SHEPHERD**  
Revenue Enablement Director, Data Centre Advisory EMEA



**JOHN MCWILLIAMS**  
Head of Data Centre Insights, Research Manager



**ANDRAS LONGAVER**  
Senior Data & Operations Manager



**MATYAS TAMÁS FAZEKAS**  
Research Analyst, Data Centre Advisory

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# VALUATION & ADVISORY

We understand the complexity of data centre assets and the nuanced interplay of variables required for an effective comparison of space.

Corporations, institutional investors, and lenders alike turn to our professionals as their trusted advisors for critical debt and equity investment decisions regarding their mission critical assets and properties. Whether it is a single asset appraisal, portfolio valuation, or valuation for financial reporting, our team has the track record and specialized expertise to meet your organization's needs.

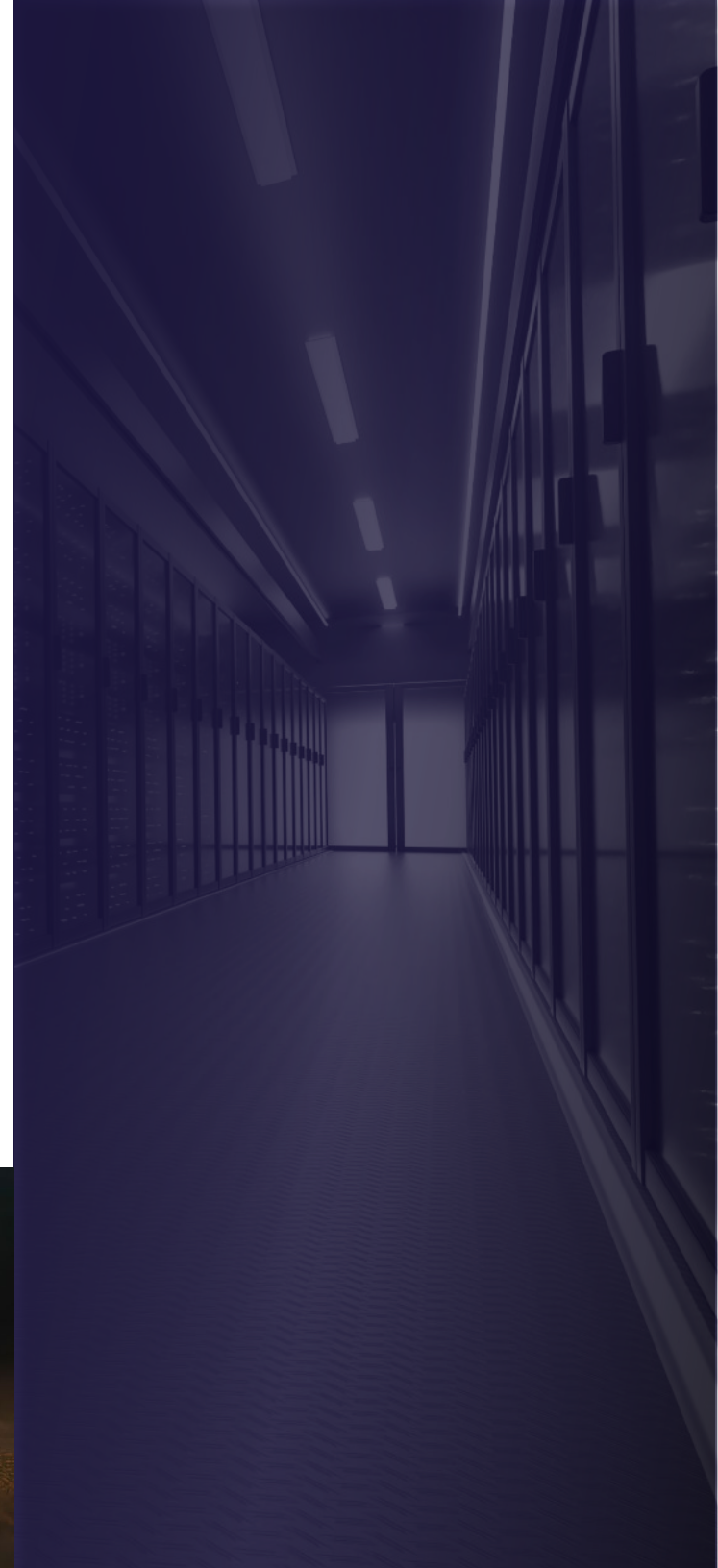
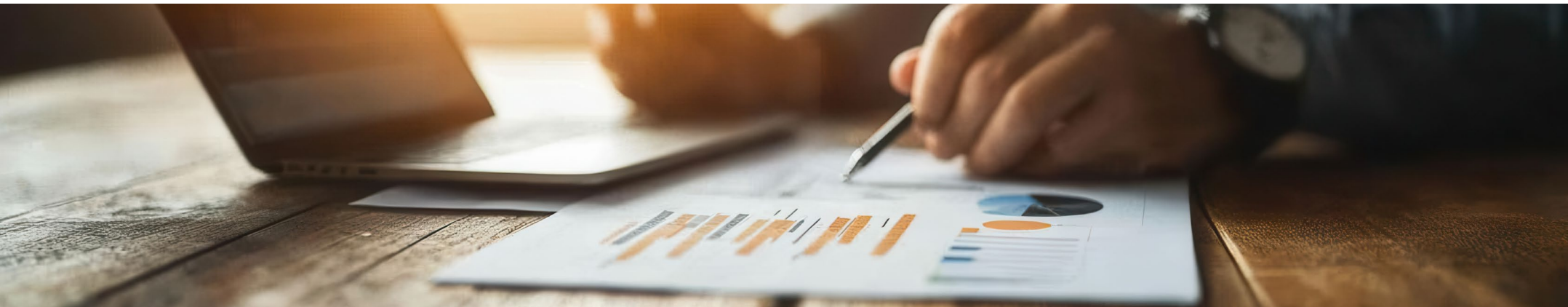
C&W's Data Centre Advisory Group has vast experience in the industry. Our team has been engaged in appraisal assignments in markets throughout the Americas, APAC, and EMEA. This body of ongoing experience with mission critical facilities affords our team unique insights into the data centre market. The data we have assembled, coupled with our extensive research and market knowledge, gives us a real-time advantage in helping our clients to make sound and market facing business decisions.

## SERVICES INCLUDE

- Single asset appraisal
- Portfolio valuation
- Valuation for financial reporting
- Financial and tax consulting
- Corporate planning; merger and acquisition consulting; litigation support
- Asset analysis, purchase price allocation, pro forma reviews

## HOW WE ARE PAID

- Fixed fee agreed at project outset
- Or on hourly basis for additional Advisory work.





VALUATION & ADVISORY PROOF POINTS



**ARK DATA CENTRES**

<b>Location</b>	Union Park, Hayes, London
<b>Details</b>	New development



**STRATOZ/EQUINIX**

<b>Location</b>	Kuiperbergweg 13, Netherlands
<b>Details</b>	Shell DC



**KEPPEL**

<b>Location</b>	Rondebeltweg 62 DC1-2, Almere, Netherlands
<b>Details</b>	Shell & Core DC



**MAPLETREE**

<b>Location</b>	Fokkerweg 30, Oude Meer, Netherlands
<b>Details</b>	Shell & Core DC



**SWIFT**

<b>Location</b>	Energieweg, Zoeterwoude, Netherlands
<b>Details</b>	Fully Fitted DC



**KEPPEL**

<b>Location</b>	UK, Ireland, Netherlands and Frankfurt
<b>Details</b>	Keppel EU portfolio 11 properties



**ABNAMRO**

<b>Location</b>	Groenelaan, Amstelveen, Netherlands
<b>Details</b>	Fully fitted DC



**ENGIE**

<b>Location</b>	Velizy, France
<b>Details</b>	Potential acquisition consultancy of DC site



**KEPPEL**

<b>Location</b>	Cloughran House, Mitchelstown, Dublin, Ireland
<b>Details</b>	New development



**ARK DATA CENTRES**

<b>Location</b>	Alliance Park, Park Royal, London
<b>Details</b>	New development



**ABRDN**

<b>Location</b>	Docklands, London
<b>Details</b>	Shell & Core DC



**ARK DATA CENTRES**

<b>Location</b>	Mercure Hotel Site, Watford
<b>Details</b>	New development. 18-acre site with 120MVA of power secured.



# PROJECT & DEVELOPMENT SERVICES

At C&W, our Project & Development Services (PDS) team offers a comprehensive suite of services for data centres, including technical due diligence, technical assistance, project management, building consultancy, construction management and dilapidations.

Our project management team ensures timely and cost-effective execution of data centre development, managing design, construction, and commissioning. We handle end-of-lease obligations, ensuring compliance and cost-effective resolutions. Our technical due diligence provides thorough facility assessments, identifying potential issues and ensuring regulatory and technical standards are met. Our building consultancy services offer expert advice on construction, renovation, and compliance to meet operational and safety standards. Our construction management services ensure that projects are completed within the project schedule and approved budget.

Our Data Centre Project & Development Services team have unparalleled and proven experience in Data centres with clientele that includes Digital Edge, Microsoft, Citibank, AWS, NTT, PDG, Oracle, Tata Communications and Equinix. We are committed to delivering our services and managing every phase for your Data Centre with proactive stakeholder communication.

The engineering design team includes WiredScore and SmartScore accredited professionals who guide clients to achieve the highest certification levels. Tony Comber is an Uptime Institute Accredited Tier Designer, aiding clients across EMEA in understanding site classifications and ensuring compliance. As your design authority we can provide independent advice on engineering system design, resilience, installation and operation. We also provide independent advice on engineering commissioning following LEED commissioning authority protocols.

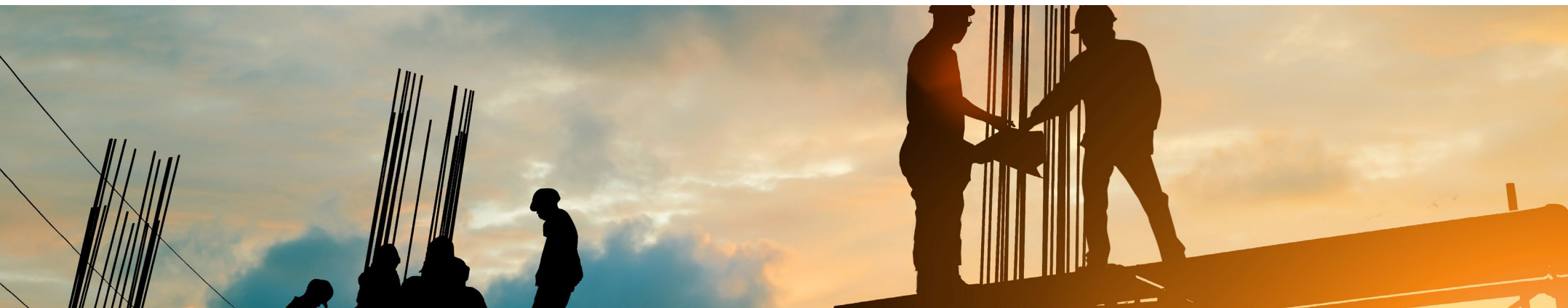
With C&W, you gain a trusted partner committed to delivering excellence, ensuring your data centre projects are completed efficiently, on time, and within budget.

## SERVICES INCLUDE

- Technical Due Diligence
- Technical Assistance
- Project Management
- Building Consultancy
- Construction Management
- Dilapidations
- Main Room Equipment Installation
- Engineering Advice & Commissioning Support

## HOW WE ARE PAID

- Consultancy Fee





## PROJECT & DEVELOPMENT SERVICES PROOF POINTS



### DIGITAL REALTY

**Location** Woking, UK

**Service** Dilapidations

Condition Assessment, Technical Inspection & Dilapidations Assessment of 10k sf colocation space.



### CONFIDENTIAL CLIENT

**Location** Chennai, India

**Service** Project Management

20MW Greenfield Facility Build

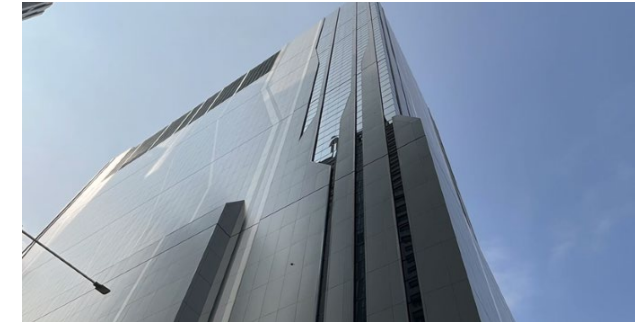


### GLOBAL CLOUD SERVICE PROVIDER

**Location** Singapore

**Service** Client Construction Management Representative

Greenfield construction designed with a 50MW power capacity and occupying 344,789 sf



### DIGITAL EDGE

**Location** Jakarta, Indonesia

**Service** Acquisition Advisory & Project Management

Brownfield Base Build Construction and Internal Fit-Out for a 408,361 sf Data Centre with 23MW power capacity.



### PRINCETON DIGITAL GROUP

**Location** Cibitung, Indonesia

**Service** Project Management

White-space Fit out for Phase Two deployment, with a capacity of 5MW, paving the way for future growth to a 20MW data centre campus.

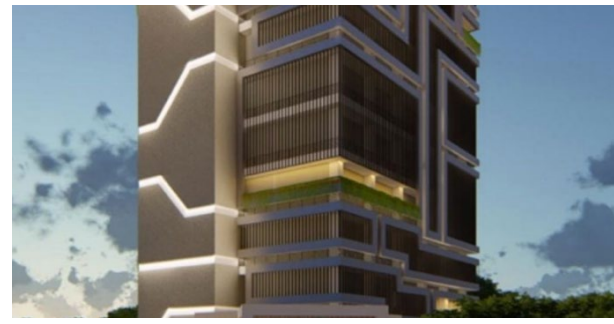


### CONFIDENTIAL CLOUD COMPANY

**Location** Chiba, Japan

**Service** Project Management

Build To Suit Project Management and Sale & Lease Back



### COLOCATION DC SERVICE PROVIDER

**Location** Jakarta, Indonesia

**Service** TDD, Construction and Project Management

Greenfield project for the construction of a 188,368 SF Data Centre boasting a robust 35MW power capacity.



### GOOGLE

**Location** Paris, France

**Service** Main Equipment Room

30 Cabinet - 90kW - Tier III equivalent.



# OUR DATA CENTRE SUSTAINABILITY SOLUTIONS

Our sustainability solutions for data centres are focused on helping you align with corporate net zero targets, mitigating carbon emissions, providing access to clean energy, drive uninterrupted operations, bringing cost savings and attracting investors. We can integrate sustainability solutions across these four key stages of the data centre real estate lifecycle:



## /// SITE SELECTION

Understanding of operators PUE, cooling technology and renewable power sourcing per asset.

Climate risk assessment - during operator/site selection. E.g. surface water flooding risk.

Adaptation and mitigation plans, periodic reporting on current and future climate risk.



## /// DESIGN & CONSTRUCTION

ESG considerations in procurement and contractor selection.

Tracking that sustainability related design elements are monitored and delivered.



## /// OPERATIONS

Energy, carbon, water & waste strategy - audit site, develop.

Net zero, decarbonization, resource efficiency road mapping & implementation.

Climate risk assessment for your portfolio.



## /// REPORTING

Monitor energy/carbon/water usage & efficiency performance and report against goals, commitments, KPIs.

For funds: GRESB advisory

Certifications: LEED, EDGE



# WHY CUSHMAN & WAKEFIELD?

## DATA, EXPERIENCE & EXECUTION



### GLOBAL REACH

A leading Global Data Centre Advisory platform with deep experience managing complex global portfolio requirements for cloud, colocation, and enterprise data centre operators.



### COMPREHENSIVE DATA

Market data, colocation availability, pricing, rental rates, and supply/demand forecasts built on institutional and field research for markets around the globe.



### MARKET INSIGHTS

Global Data Centre Market Comparison that analyses emerging trends and operational risk in established and emerging countries.



### THOUGHT LEADERS

Thought leadership that provides a unique and intelligent perspective on trends and topics influencing decision making.

**Blending unparalleled expertise, market insight, and global reach**





**CUSHMAN &  
WAKEFIELD**



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#### **ABOUT CUSHMAN & WAKEFIELD**

Cushman & Wakefield (NYSE: CWK) is a leading global commercial real estate services firm for property owners and occupiers with approximately 52,000 employees in nearly 400 offices and 60 countries. In 2023, the firm reported revenue of \$9.5 billion across its core services of property, facilities and project management, leasing, capital markets, and valuation and other services. It also receives numerous industry and business accolades for its award-winning culture and commitment to Diversity, Equity and Inclusion (DEI), sustainability and more. For additional information, visit [www.cushmanwakefield.com](http://www.cushmanwakefield.com).

**Better never settles**

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