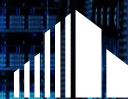


DATA CENTRE MARKETBEAT

Autumn 2019



CUSHMAN & WAKEFIELD

MILAN

MARKET OVERVIEW

Milan is the largest data centre market in Italy, buoyed by strong financial and engineering sectors and considered the business capital of the country. The market has long acted as a second-tier location in relation to the largest data centre clusters throughout Europe, with players such as Equinix, SUPERNAP, Colt, Telecom Italia, DATA4, and Aruba.IT offering colocation options among others. Milan boasts the Via Caldera internet exchange spanning 110,000 sqm and providing access to all major telecommunications networks in-country.

As Italian enterprises begin their progression to the cloud, Milan has drawn interest from the largest cloud services organizations as a new growth market. Amazon announced a new formal region late in early 2018, with plans for a formal roll-out in 2020. Microsoft's Azure cloud suite is following with a new local ExpressRoute, and Google has signed a partnership for Cloud offerings with Telecom Italia. Each of these major services has designs on controlling the narrative for large-scale deployments across the continent with further secondary European markets becoming the new battleground.

Milan is thus an intriguing market with a sizable upside for operators and cloud service providers alike. Continued growth is anticipated over the next couple of years as the ecosystem develops.



“Milan is an intriguing growing market with interest from all major cloud providers and a developing ecosystem with strengthening connectivity.”

CONSTRUCTION UPDATE

OPERATOR	LOCATION	SIZE (SQM)	POWER (MW)	STAGE / EST. DELIVERY
Aruba.IT	Milan	10,000	10 (est)	Under Construction / Q4 2019
Equinix	ML5 Phase I	1,213	2 (est)	Under Construction / Q4 2020
SUPERNAP	Milan	3,000	4.8	In Planning

MORE INFORMATION:

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UNDER CONSTRUCTION

12 MW

ECOSYSTEM DEVELOPMENTS

- **PhoenixNAP** has added a new point of presence (PoP) in Milan, adding the sixth such location throughout Europe and the fourteenth globally. The PoP will function as a full production node for the company, following continental locations in Amsterdam and Belgrade.
- **Telia Carrier** added another PoP at SUPERNAP Milan, offering direct connectivity to service providers like Amazon, Google, and Microsoft Azure.
- **Microsoft** announced Milan as a new ExpressRoute meet-me site for Azure, joining an upcoming edge site in Rome as new markets in Italy. The new sites are part of a massive roll-out in 31 new markets worldwide.
- **euNetworks** has completed a new fibre network across Milan, with 118 kilometres now operational throughout the market. The network connects eight local data centres and was announced with a similar new rollout in Madrid.
- **Amazon** remains in progress on a new region for Milan that will offer three local availability zones. Full rollout is expected early in 2020 as the company continues its European expansion.
- **Telecom Italia** announced a new partnership with Google to construct new data centres throughout Italy offering Google Cloud to mid- and large-size businesses. Milan will be one of the featured markets along with Rome and Turin.

GLOBAL DATA CENTER ADVISORY GROUP

Cushman & Wakefield's [Data Center Advisory Group](#) is a global team of elite professionals delivering specialized real estate solutions for mission critical users, owners, and environments. With scalability, reliability, and security as a driving force, our highly knowledgeable and responsive professionals guide clients to make effective financial decisions. Our expertise ranges includes colocation facilities, control centers, greenfields, powered shell, and trading floors. We lend additional value through our understanding of global dynamics and their impact on local markets.