



## **Der Datacenter-Markt in München**

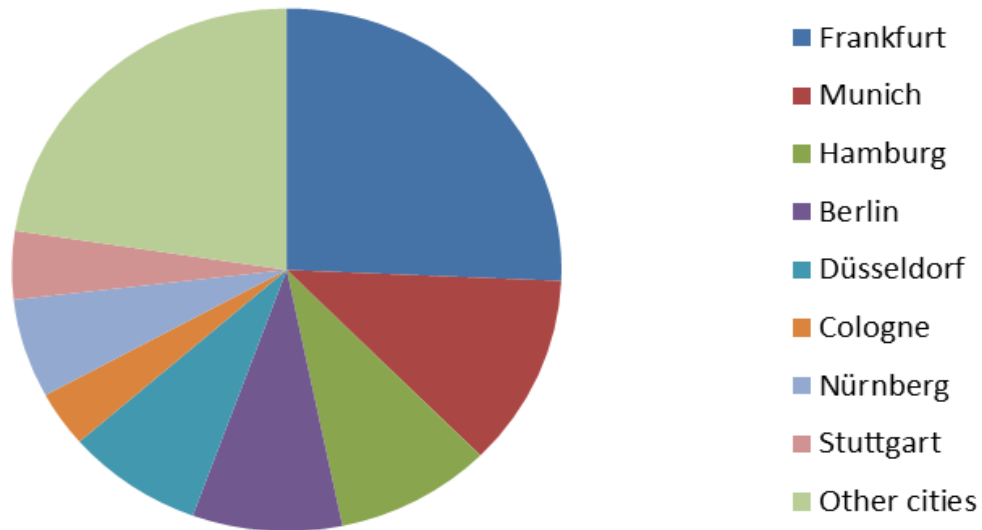
**eco Trialog  
Munich  
June 2013**

# > 250 3<sup>rd</sup> PARTY CO-LOCATION SITES

Note: refers to **number of locations** - *not the size of sites*



## Data centres across Germany



Source: BroadGroup German Data Centres: Market Report

# GROWTH POTENTIAL OF CITY HUBS – BEYOND FRANKFURT



## Outside Frankfurt

- Growing need for 2<sup>nd</sup> data centre sites  
- not all business users need low latency
- Disaster Recovery and Business Continuity (DR/BC) in local areas
- ‘Trusted brand’ local relationships
- Local business eco-systems
- Wholesale data centres in places like Berlin
- Large, high security /cloud data centres in less urban areas –e.g. T-Systems



# CITY HUBS HAVE DIFFERENT TYPES OF BUSINESS CUSTOMERS

City	City business focus	3rd Party Operators	Internet Peering Exchanges
Berlin	Public sector, commercial, some banking	20	BCIX, ECIX
Düsseldorf	International business and finance, media, fashion and trade fairs.	16	ECIX, DE-CIX
Frankfurt	Major hub for banking, commerce and media . Multinationals, telcos, major data centre players all have presence	38	DE-CIX +14 DE-CIX enabled data centre sites, KleyRex, fra-NAP
Hamburg	Commerce, media, Internet, publishing	20	ECIX, DE-CIX
Munich	Banking, insurance, high-tech, digital media, automotive, electronics , R&D	21	DE-CIX, KleyRex, INXS
Nürnberg	Manufacturing, automation, energy, medical technology, high tech fairs	11	N-IX
Stuttgart	Significant corporates with in-house data centres	12	-
Other places (35)	Varies according to city/town	64	-

Source: BroadGroup Report, 2011

# CHARACTERISTICS OF THE MUNICH MARKETPLACE

- 3<sup>rd</sup> largest city in Germany with 1.35 million inhabitants
- 2nd to Frankfurt as the most important banking and insurance location in Germany, making it a strategic business location for financial services
- Strong economy in Munich and Bavaria
- Region known for its high-tech industries including the automotive industry, digital media and electronics – including Microsoft German HQ
- 4 of top 10 companies in Germany have headquarters in Munich - Allianz, Siemens, BMW, and Munich ReGroup
- Large enterprises headquartered in Munich tend to keep data centres in house
- T-Systems managed service data centre for multinationals e.g., Shell
- University and research & development data centres

# 3<sup>RD</sup> PARTY CO-LOCATION DATA CENTRES PLAYERS IN MUNICH

Company	City
BT	Munich
CABLE AND WIRELESS	Munich
COLT TECHNOLOGY SERVICES	Munich
EASYNET	Munich
EQUINIX	Munich
E-SHELTER	Munich
GLOBAL CROSSING	Munich
INTERNET AG	Munich
INTERROUTE	Munich
IP EXCHANGE	Munich
KPN GETRONICS	Munich
LAMBDANET Metronet	Munich
LEVEL 3	Munich
MESH	Munich
MIVITEC	Munich
MTI TECHNOLOGY LTD	Munich
NETCOM	Munich
NORIS NETWORKS	Munich
SPACENET	Munich
T-SYSTEMS	Munich
VERSATEL	Munich

**Table 3.7 Overview of co-location data centres in Munich**

*Source: BroadGroup Report, 2011*

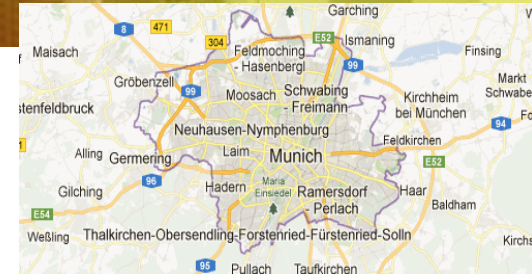
# ANNOUNCEMENTS DURING 2012

- **Deutsche Telekom** – says that state-of-the-art knowledge gained from operating the joint research data centre “DataCenter 2020” in Munich with US company Intel has resulted in significant energy savings in the design of **T-Systems** new facility in Biere, Salzland district
- **Cap Gemini** - to host data centres and deliver central IT infrastructure services for **Media-Saturn** (900 locations globally ) including its own marketing agency **redblue Marketing** in Munich
- **SuperMUC** - Europe’s most powerful X-86 based supercomputer officially launched – it is located at the Leibniz- Rechenzentrum in Garching, near Munich
- **Level3** announced that its 5 data centres in Germany, including Munich, are now powered by 100% renewables energy
- **IP Exchange** opened a new 5,000 m<sup>2</sup> data centre in Munich in March 2012. In co-operation with German IT services provider and QSC subsidiary, Info AG, this facility provides a full range of data centre services

Source: [www.datacentres.com](http://www.datacentres.com)



# RELATIVELY FEW ANNOUNCEMENTS SO FAR IN 2013



- **euNetworks** - multi-year agreement to deliver dark fibre services enabling backbone development of **Hofmeir Media's** four divisions and connection of 3 data centre sites in Munich
- **Verne Global**, a UK-based developer of green energy-powered data centres, appointed a new Director of Business Development - based in Munich to develop business in the DACH region
- **Apple** confirmed that all its data centres – including Munich – run on 100% renewable energy

Source: [www.datacentres.com](http://www.datacentres.com)



# OUTLOOK FOR MUNICH DATA CENTRE MARKET



- Will continue as a strong location for business sectors currently in the region
- A 'second' location after Frankfurt for third party hosting in southern Germany
- The need for upgrades and state-of-art technology could trigger upturn in demand for co-location amongst companies in Bavaria – but enterprise preferences to keep data centres 'in house' is likely to remain a strong factor in how the market develops

# THANK YOU

## Consulting services



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## Research Reports

### Data Centers South East Asia IV (April 2013)



This new report - the 4th edition - evaluates 83 vendors with 187 data centers across the 4 South East Asian markets...

### CHINA CLOUD - Challenges and Opportunities in China's Cloud Deployment



In this new report by BroadGroup, China Cloud investment and datacenter developments are identified for the first time. Based research completed over 8 months...

### Germany Market Update (July 2012)



Updated report on datacentre and cloud markets in Germany

### Power Market, Power Pricing and Data Centres in Europe



(June 2012)  
This new report, the first to assess the relationship between the power markets and pricing...

## Events



### 6th International DataCentre Awards 2013

13 June 2013, London

Now in its 6th year, the prestigious Datacentre Awards provide exceptional marketing differentiation...

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### 2nd DataCentre Africa

26-27 June 2013, Johannesburg

DataCentre Africa event creates a new platform for information and networking...

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### 3rd Datacentres Central & Eastern Europe

26 September 2013, Warsaw

This annual regional event provides the premier networking platform for datacentre and cloud...

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