

The Datacenter Evolution: What to look for in the future

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Providers move into new areas in search for growth



- Global DC provider are increasingly moving **from pure Colocation** into **deeper value chain** elements like Fully Integrated Solution
- At the same time, they are **widening** their **geographic reach** towards key hubs
- **Connectivity** is a topic DC providers become increasingly involved in while taking the risk of “**Carrirer-Dependent**”

Strategic Outlook

- DC providers view “**One-Stop-Shopping**” as the key to growth
- Global DC provider expand their footprint and service coverage **organic or inorganic way**
- Regional players **increases capacity** within the same region and plan to **harvest more** with enhanced service portfolio.
- There is an ongoing **consolidation** in the industry which makes **competition tougher** and **creates opportunities** on the other side.
- **Global Wholesale Carriers** steps into DC business for **bundle offer and cross-selling**



- **DRT** stepped into **EU** market with 8 DC facilities **acquisition** from Equinix for **\$874m** in May`16



- **Equinix** changed the DC market dynamics with acquisition of Telecity for **\$3.8b** in Jan`16 and continue to expand new hubs like **Istanbul**

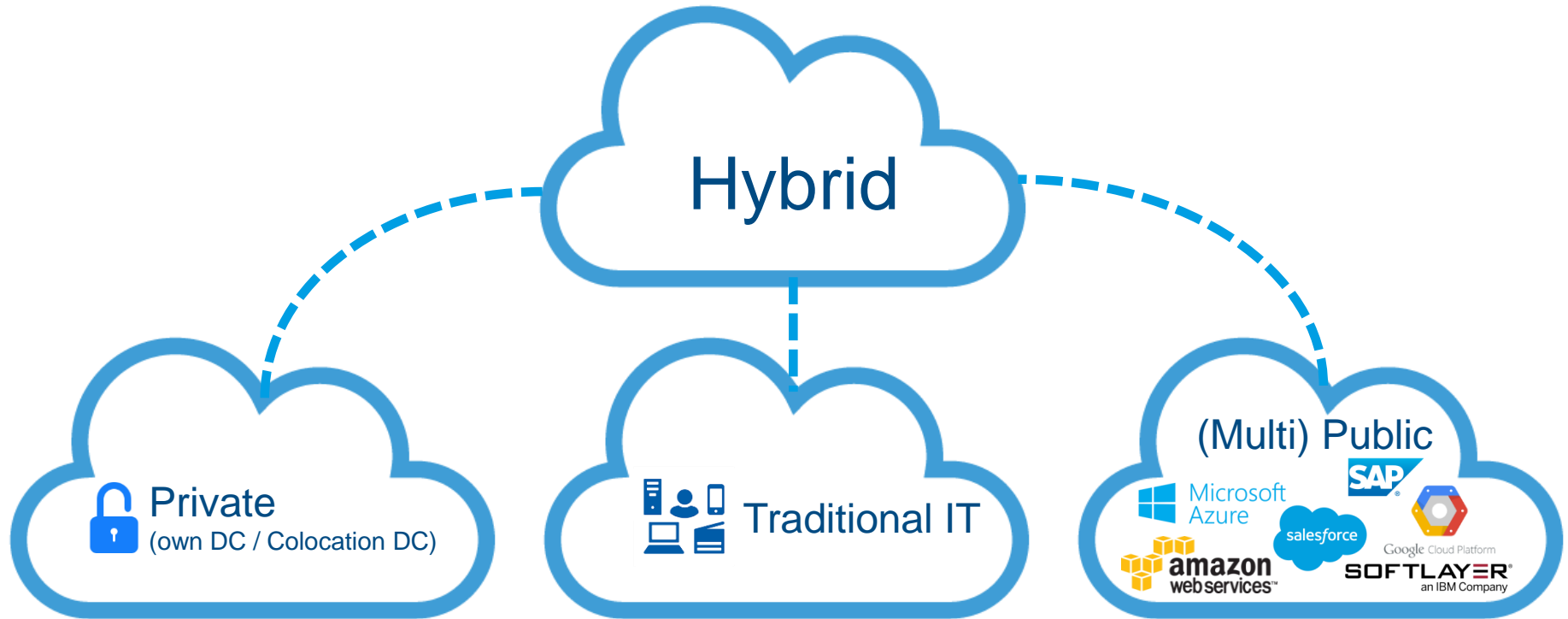


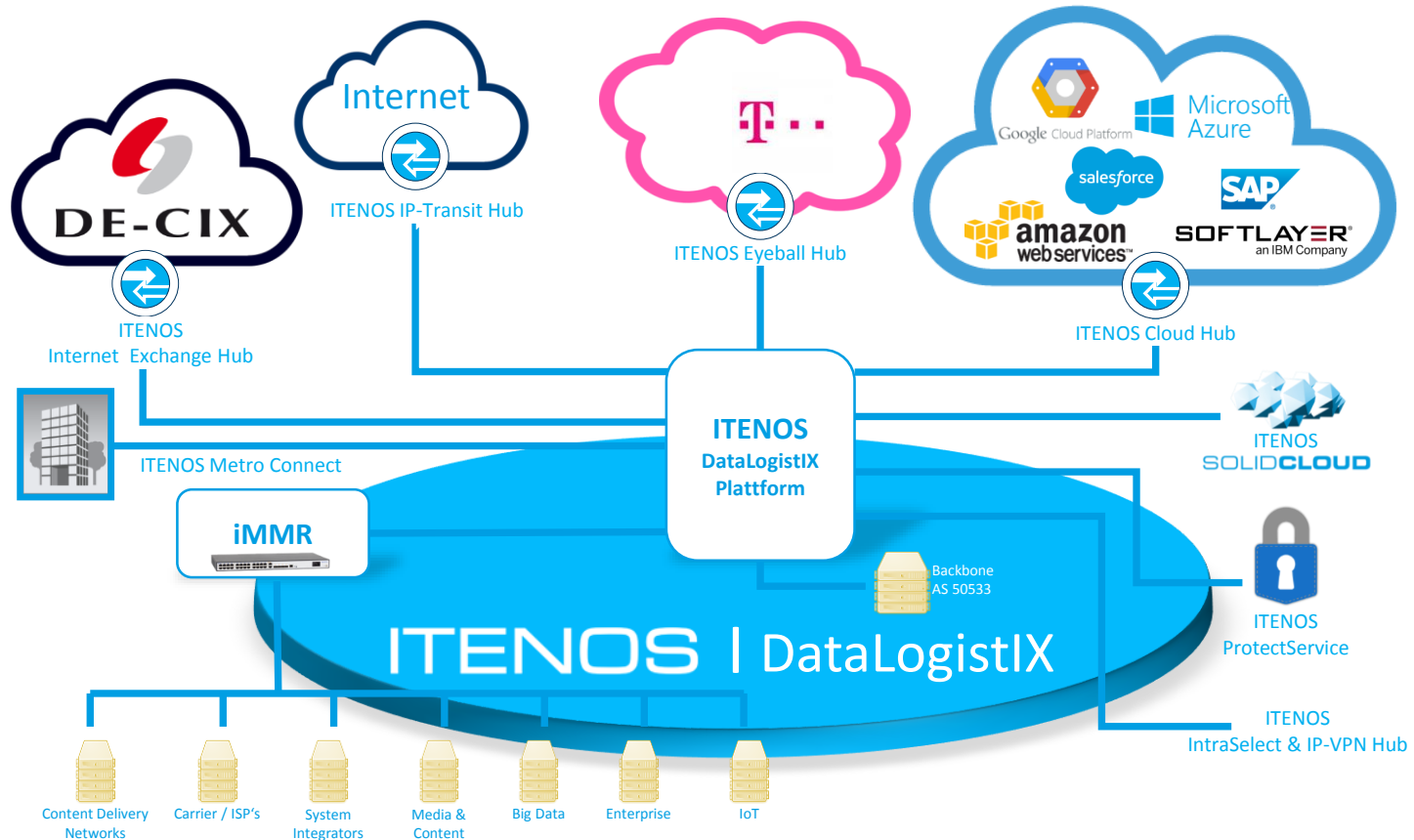
- **Acquisition** of E-Shelter for **\$830m** in March`15

Only valid for Transportation?









What are the main points you need to take into account? ITENOS

Preparation

- Partner reliability and future proof?
- IT and Network know-How?
- Are Mode of Operation, Rules and Framework defined upfront?
- Are Set Up, Flexibility and Exit defined?
- How is GDPR handled?
- Is the legal framework of the Cloud defined?

Risiks

- Dependency
- Vendor-Lock-in
- Cost related to Cloud-Exit
- Where is the Data?
- Who has access to Company data?
- Liability?



- Define with the Partner the Framework, Take consultancy
- Know-how & Experience
- Low Complexity
- Cloud- & Carrier-Neutrality
- Flexible Design and Handling
- Multiple & innovative Services
- Strong Partner on equal level
- Synergizing on Housing and Connectivity



Portfolio summary (Datacenter and managed IT)

Tailormde IT-TC Solution through modular IT- and TC-Solutions, Secure individual solutions

Data LogistIX

Interconnect:

IP Transit, IP- Access, Cloud,- Ethernet- und DECIX Connect

Application Operation

Management and operation of Individual- software and Business applications

Dynamic Resource Platform

Hybrid Managed-Hosting- and Solutions

Datacenter infrastructure

Rooms, Suites, Cages, Racks, Layer-1-Connectivity
Frankfurt am Main, Hamburg, Düsseldorf, Bonn, Leverkusen

Servicemanagement

Personal contact

Certifications

ISO 9001, 20000-1, 27001, 50001

T-Systems Zero Outage

VdS

Certified Experts

Ongoing checks

Dataprotection & Information Security

Premises in Germany

EU-GDPR

Fulfilling Governance-Rules of Deutsche Telekom AG

Documentation according to Dataprotection and security concepts

Serviceprocess

ITIL-conformity

Process of continuous improvement

24x7 Service Desk, german and english

ZERO OUTAGE
CERTIFIED PARTNER

T-Systems



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Thank you for your attention.

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