

Data Centre Market Summary

Helsinki, Finland



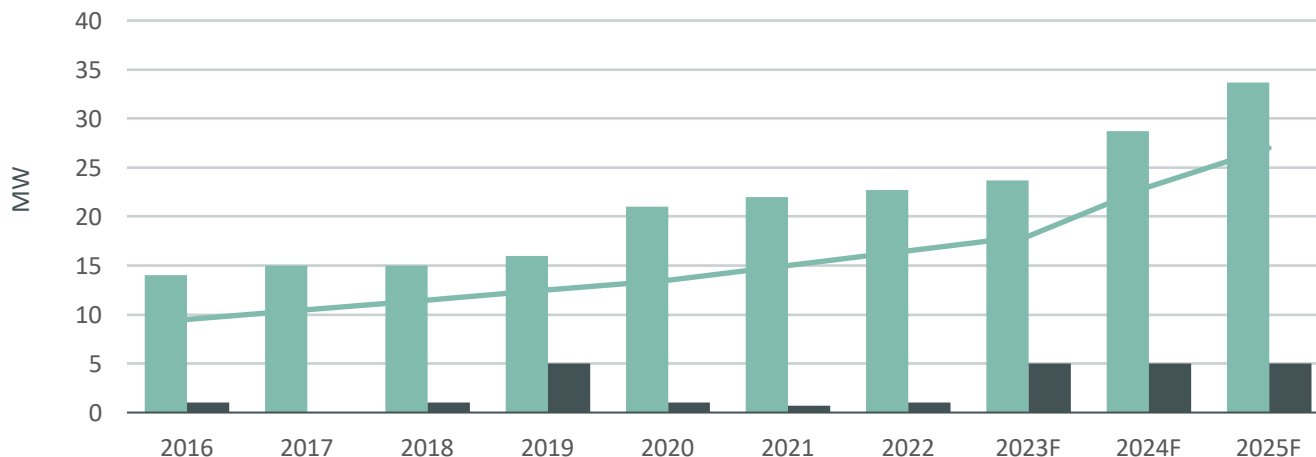
Helsinki/Finland Snapshot

- Finland ranks 1st in the EU Digital Economy & Society Index with 62% of business using the cloud, and has a high degree of IT skills, cloud usage and e-services provided by government.
- The Helsinki area is the main market but there is a series of wholesale-orientated data centres being developed in other locations around the country with land available for data centre development
- The Finnish leased data centre market has 50MW of leased colocation capacity. It is a growing market as more investment is being planned by other Nordic players, including atNorth and Hyperco with atNorth to develop a 15MW data centre at Espoo (greater Helsinki).
- Google has a self-build data centre at Hamina, first opened in 2011, opening a cloud region in 2018 and acquiring an additional 50 hectares of land in 2021.

Market Drivers

- Finland’s geographical location positions the country between Scandinavia, the Baltics and Russia – and aims to provide subsea connectivity between Finland and Asia via the Arctic Circle.
- Finland has plentiful industrial land suitable for data centre development, and is seeing selected developments from Nordic region data centre developers.

Helsinki Market Supply (MW), 2016-2025(F)



Source: CBRE Research, 2022

2022 Q3 represents supply or availability as at 30 September 2022. For take-up it represents year-to-date take-up. 2022F, 2023F and 2024F are full year forecasts

Why Finland as a data centre location?

Finland has a number of advantages as a data centres location.

- EU member
- Low electricity costs and good availability of green energy
- Low taxes for power consumption (if above 5MW per annum of power)
- 90% of Finnish electricity is provided from carbon-free sources (including nuclear power)
- Lowest total energy costs in the Nordic region
- Investors can save up to 50% on energy costs compared to other European locations.

Climate: Free air cooling allowing a lower PUE and reduced power costs compared with other European countries.

Connectivity: Subsea cables to the Nordics & Europe with a proposed Arctic Circle route to connect to Asia.


Renewables: Availability of power and renewables, heat reused in municipal heating networks

Land availability: Land for building and zoning as a data centre in plentiful supply.

Low costs: Land costs can be low, with a range of old industrial land with power available for re-purposing as a data centre campus.

Skills base: High skill base in a country with high-speed connectivity & cloud adoption.

Incentives: Available for new investors and help with land selection and planning approvals.



High growth is great news for Finland, but as a result, the industry needs to focus on nurturing great talent to build and maintain our data centres.

Why choose the data centre industry as a career?

The data centre industry is attractive as a meeting point between infrastructure and digital services.

Data centres will always be required and have become an essential part of the 21st century. Data centres house cloud services and allow the internet to function.

Data centres enable e-commerce, social media, e-medicine, video streaming – in short, they support all of the features of modern life.



A GROWING
INDUSTRY



DEVELOP & MANAGE
A COMPLEX ECOSYSTEM



GAIN TECHNICAL,
OPERATIONAL &
COMMERCIAL SKILLS



HELP RUN & MAINTAIN
ESSENTIAL DIGITAL
INFRASTRUCTURE



SIGNIFICANT
CONTRIBUTION TO THE
DIGITAL ECONOMY


How CBRE
nurtures talent
in the data
centre industry




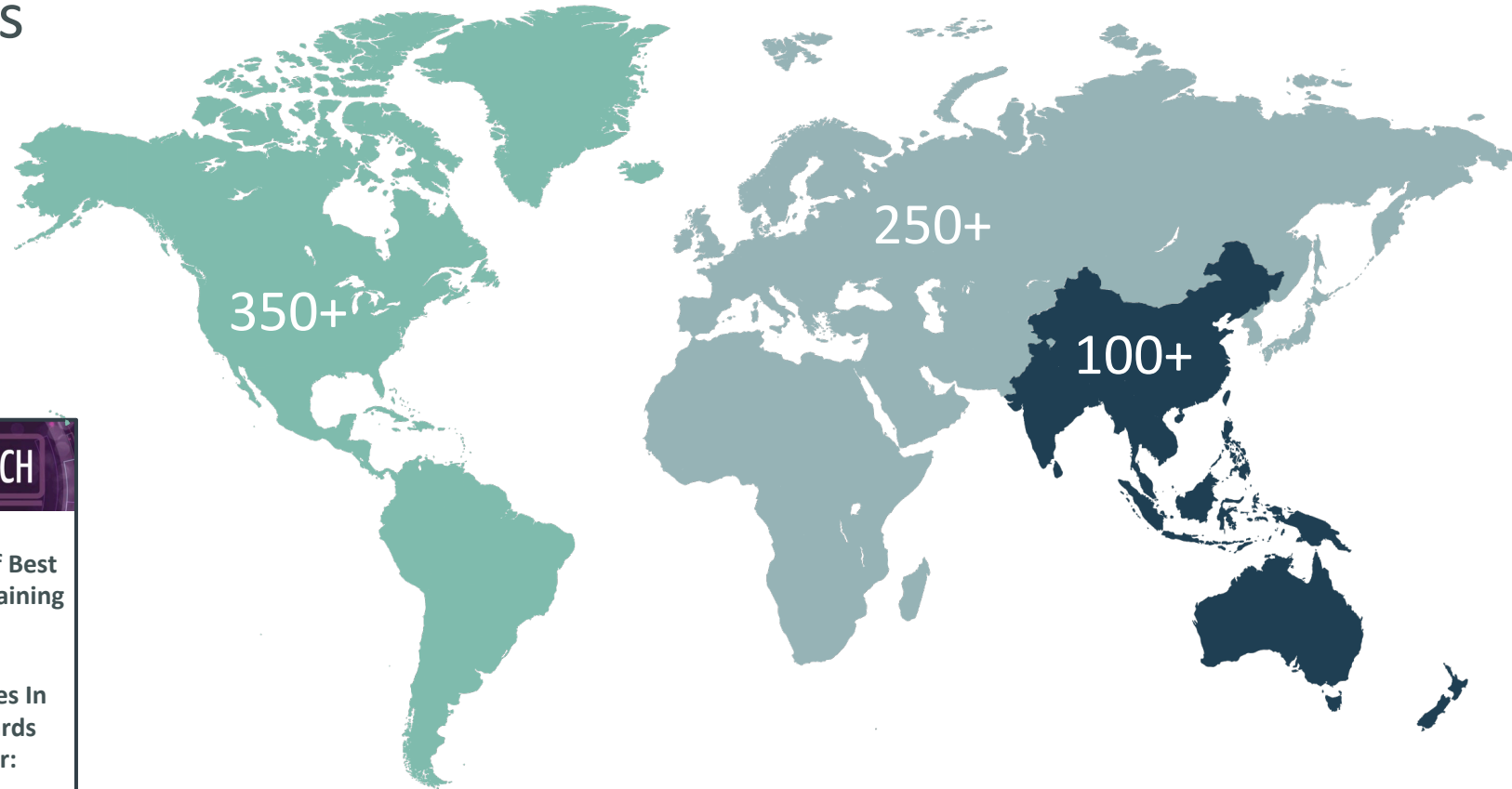
CBRE Data Center Solutions

 **4000+**
Data Center Technicians

 **700+**
Managed Data Centers

 **45+**
Countries with Managed Sites

 **\$1Bn+**
Revenue



DATA CLOUD GLOBAL AWARDS 2023

Global Data Center Service Provider of the Year Award

Commitment to Diversity and Talent Development Award

Education and Employment Project Award In partnership with UTC Heathrow

DCS AWARDS

2023 Winner Data Center Company of the Year

DATA CENTRE WORLD

2023 Winner Best Talent Developer with UTC Heathrow

WOMEN in TECH

2022 Winner of Best Employer for Training

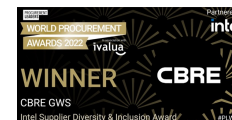
British Ex-forces In Business Awards Nominee for:
Champion of Women, Sara-Jane La Roche, Sr People Director.



Gender Equality Index, 2022 (third year)



The Best of the Global Outsourcing 100, 2022 (16 consecutive years)



World Procurement Awards Winner 2022, Global Supplier Diversity & Inclusion Programme.



Sustained Excellence Award, 2021 (14 consecutive years)



#11, 100 Most Sustainable Companies, 2022 (5 years)



A Most Admired Company, 2022 (12 consecutive years)

Making CBRE, and the data centre industry, a career destination of choice

Opportunities for career progression

We invest significantly in our people, offering upskilling and career progression to support professional development. We allow our people to upskill, explore new careers within the business and highlight transferable skills within the data centre industry.

Recognition & reward

Our internal recognition and rewards programmes acknowledge the outstanding performance of our teams and individuals. We benchmark our highly competitive employment and benefits packages to ensure that we continue to retain and attract the industry's best talent.

Promoting the industry

We team up with universities to equip learners with the skills necessary for technical careers in the data centre industry. Our partnerships aim to tackle the long-term skills shortage in the industry, with a data centre focused curriculum for 14 to 19-year-olds.

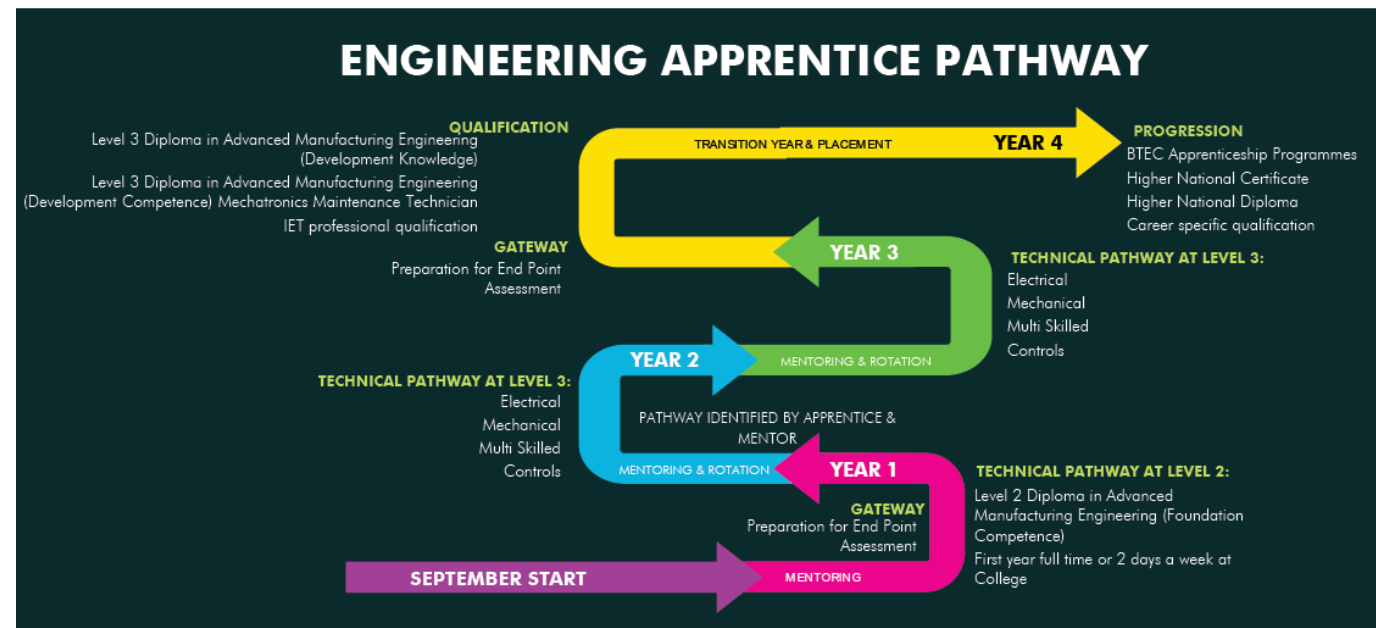
CBRE also partnered with JobOppo to expand our reach to ex-Armed Forces and spread awareness of valuable transferable skills within the data centre industry, providing a new career ladder to climb.

With these efforts, in 2022, we doubled our number of technicians from 2,000 to 4,000 and provide twice the industry average for training and development.

CBRE Apprenticeship Scheme

CBRE’s award-winning Apprenticeship Scheme provides an unique opportunity for new talented individuals to start an exciting career within the Engineering and Facilities Management Industry. This four-year programme offers the opportunity to develop skills, build confidence and ‘earn while you learn’ in a supportive, hands-on environment with the tools needed to launch a career. Each year we take 50 talented engineering apprentices who work in some of the most famous and iconic buildings, supporting a spectrum of well-known clients.

What CBRE offers within the Apprenticeship programme:



Developing talent in-house

CNet DCTP® & CDCMP® certifications

CBRE is the first company in the industry globally to commit to certify 100% of its global technical workforce.

CNet CCAM®

CCAM® establishes and assesses the baseline knowledge for each data centre technician, and monitors their improvement over time.

CCAM® provides real-time analysis of competence and confidence for individuals and teams and exposes root causes of employee behaviour (positive and negative) in our facilities.

Its complex software, supported by a team of psychologists and operates within International Test Commission guidelines, works through individual skillsets, knowledge base, and ability gaps to identify people risk.



Human Factor training

In partnership with renowned psychologist Dr. Tim Marsh, a world authority on behavioural safety, safety leadership, and organisational culture, we developed CBRE DCS Human Factors Training.

This program covers wellbeing and other factors which can affect a technician's ability to perform well and how to act in stressful situations.

We provide classroom training, facilitation, group discussions and practical exercises, and aims to increase safety, quality, and efficiency in critical maintenance operations by reducing human error and its impact on maintenance activities.

CBRE have implemented this training for over five years, and our latest results show that only 16% of unplanned downtime was related to human error versus an industry average of 70%.

Thank you



Gracias

धन्यवाद

Salamat

धन्यवाद

Obrigado

謝謝

Спасибо

감사합니다

Merci

תודה שכיב

Danke

おかげさう

Terima Kasih

شكرا

FOR MORE INFORMATION

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