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Global networks: Developments & perspectives

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TELEGEOGRAPHY

What we'll cover

Global network trends

- How fast is int'l IP bandwidth growing globally?
- Where are content DCs being built? How fast are global prices falling

European network trends

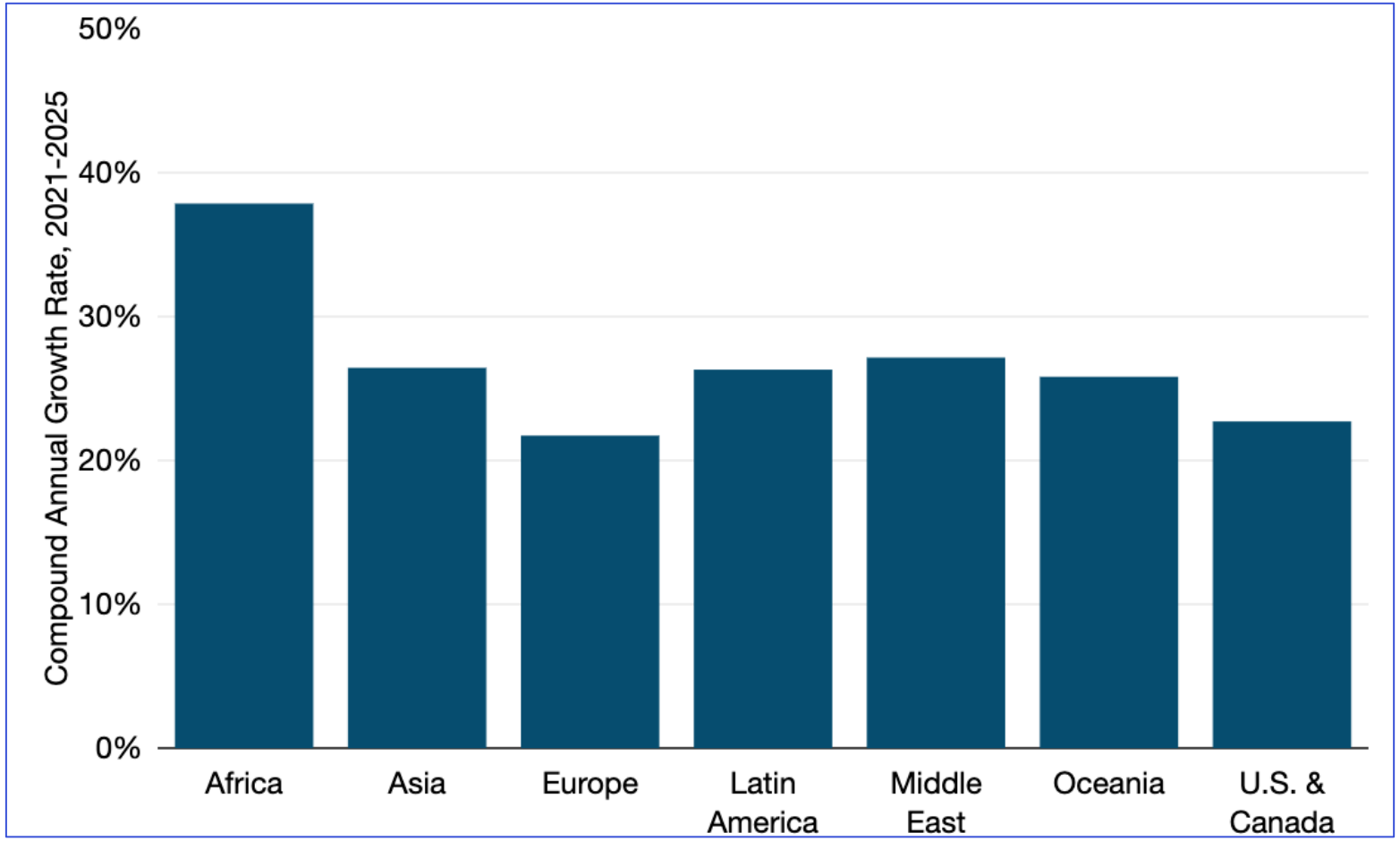
- Inter-regional int'l capacity growth
  - Capacity and pricing changes
- Intra-regional trends

Interconnection hubs and DC growth

- Cloud region landscape

Global network trends

Int’l Internet bandwidth growth by region



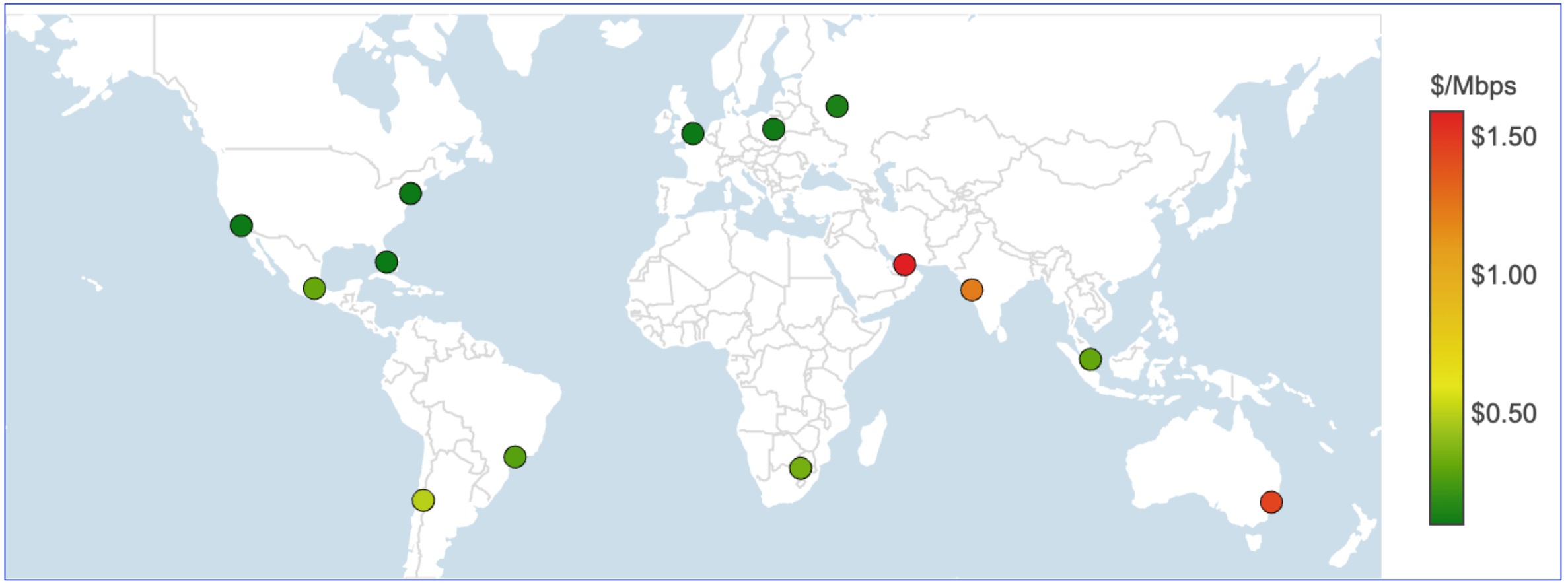
Source: TeleGeography, Cloud and WAN

Planned Cloud data centers

Source: TeleGeography, Cloud and WAN

IP Transit prices in major global cities

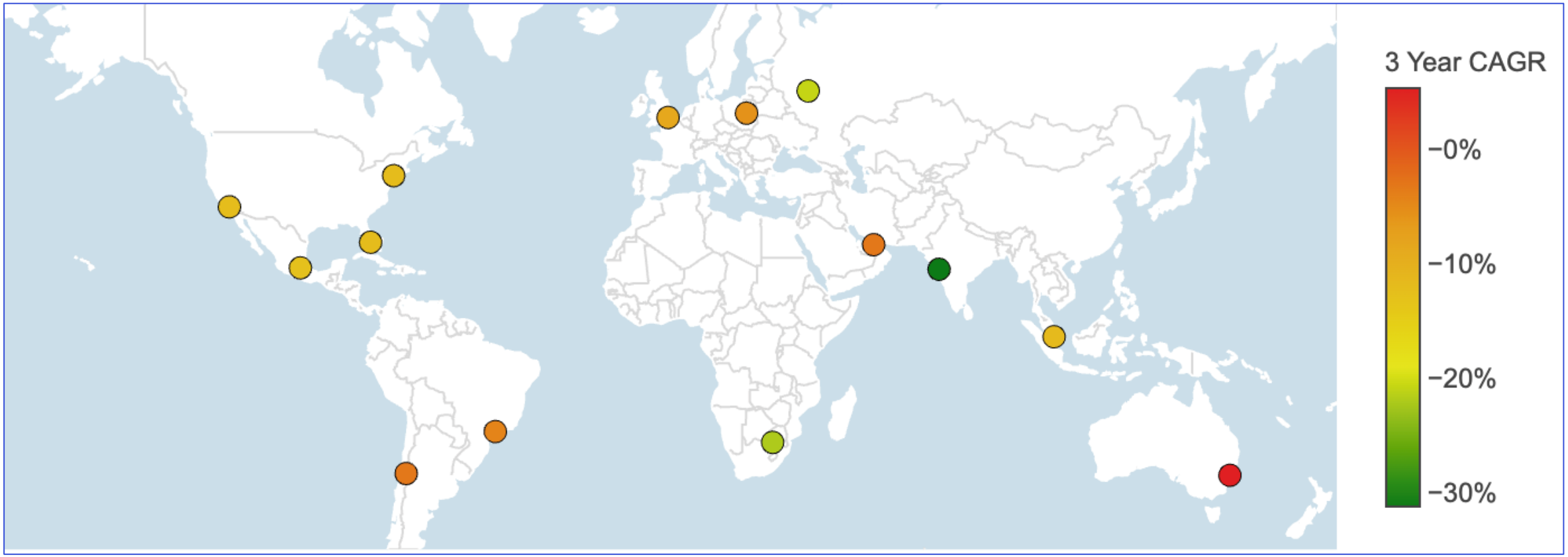
Weighted Median 100 GigE IPT



Source: TeleGeography, IP Networks

IP Transit prices in major global cities

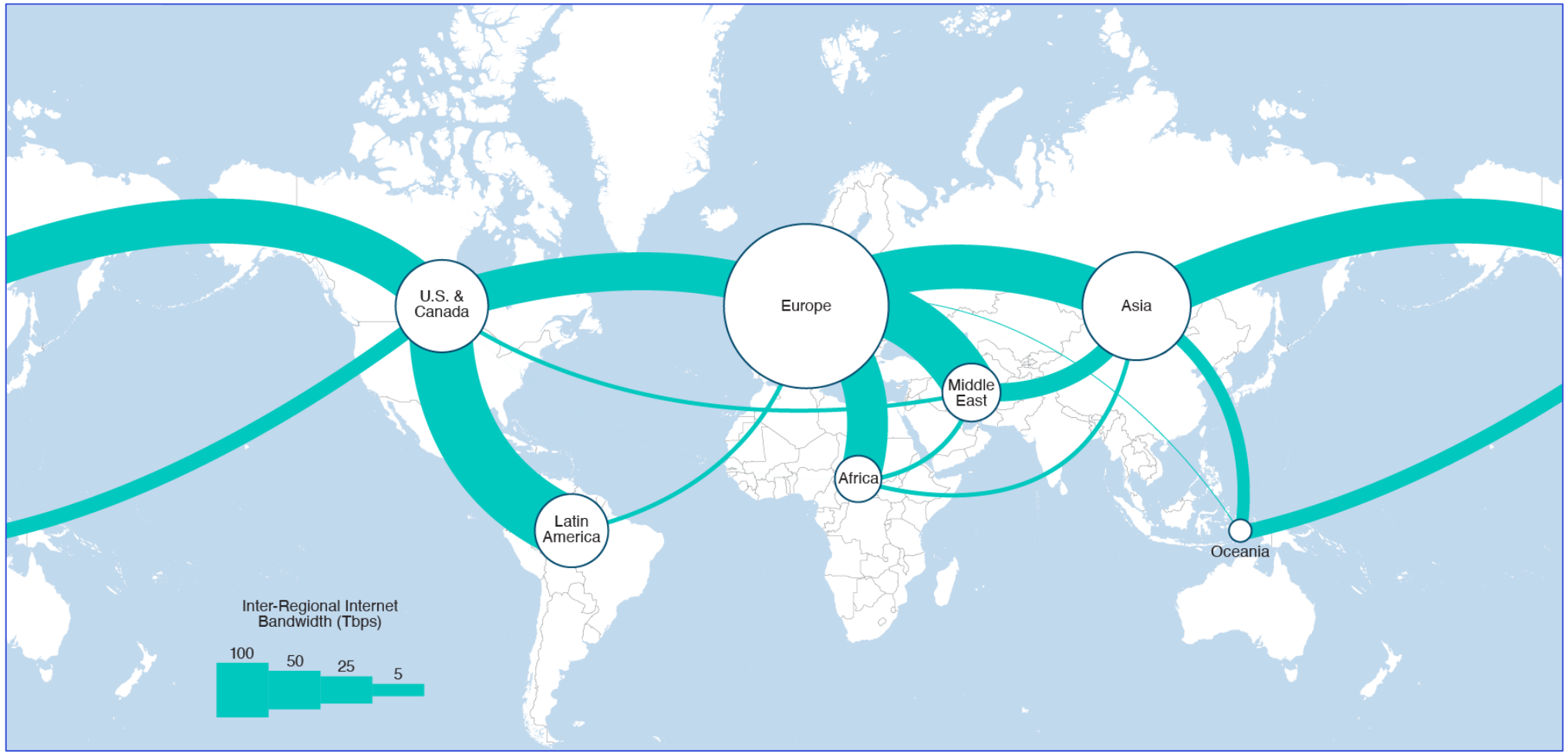
Three year CAGR decline in major global cities



Source: TeleGeography, IP Networks

Europe inter-regional trends

Global inter-regional routes, 2025



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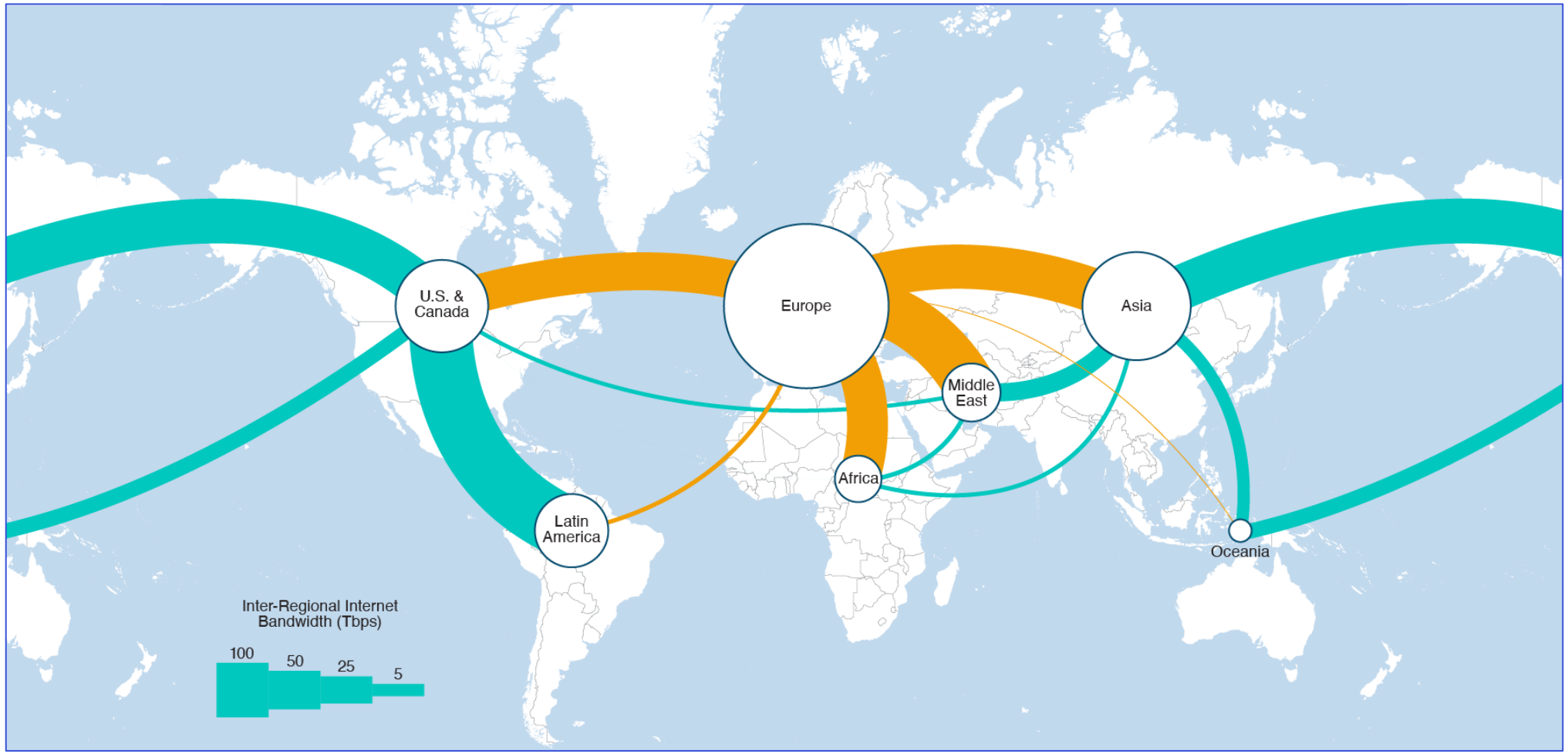
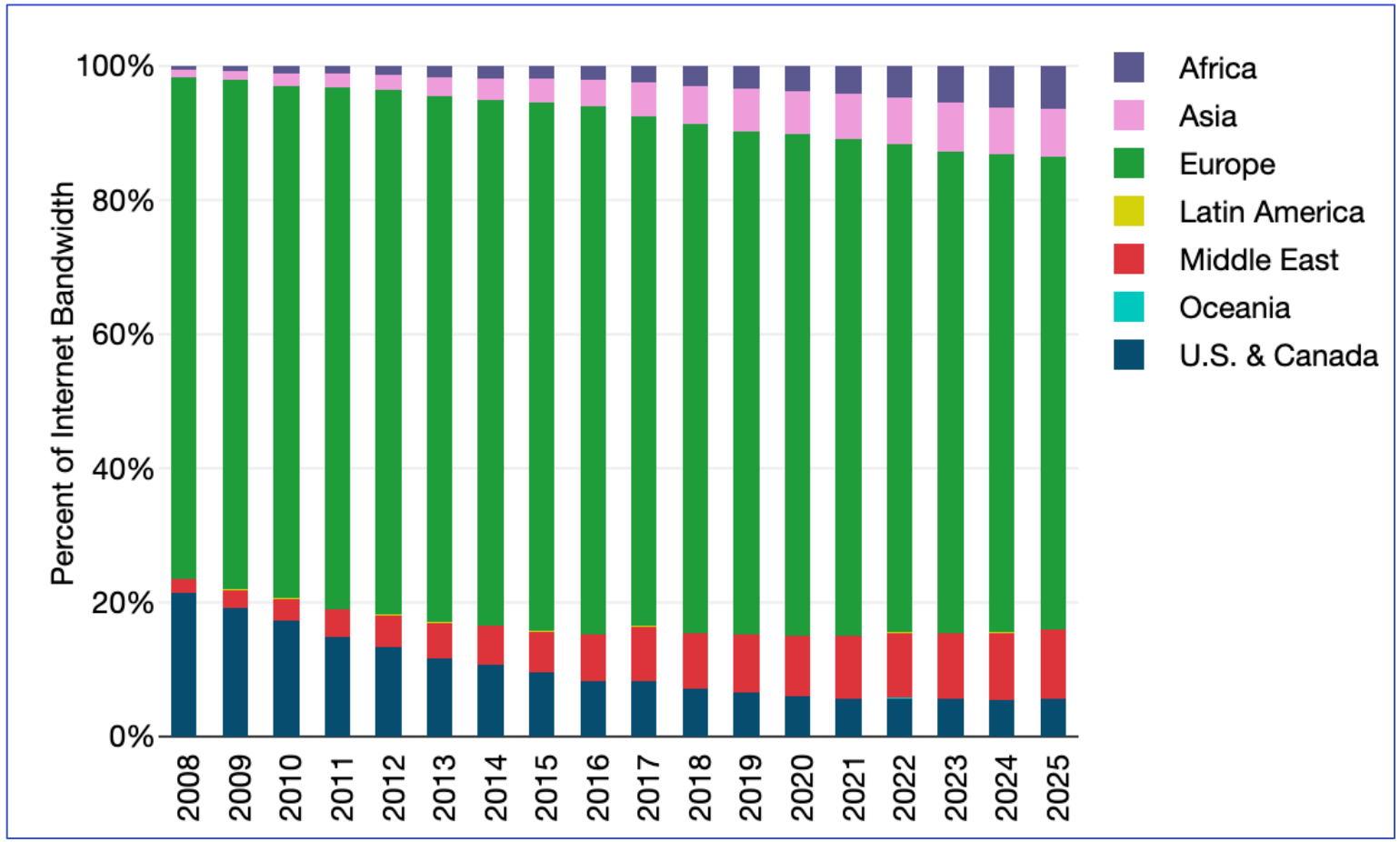
Global inter-regional routes, 2025



Source: TeleGeography, IP Networks

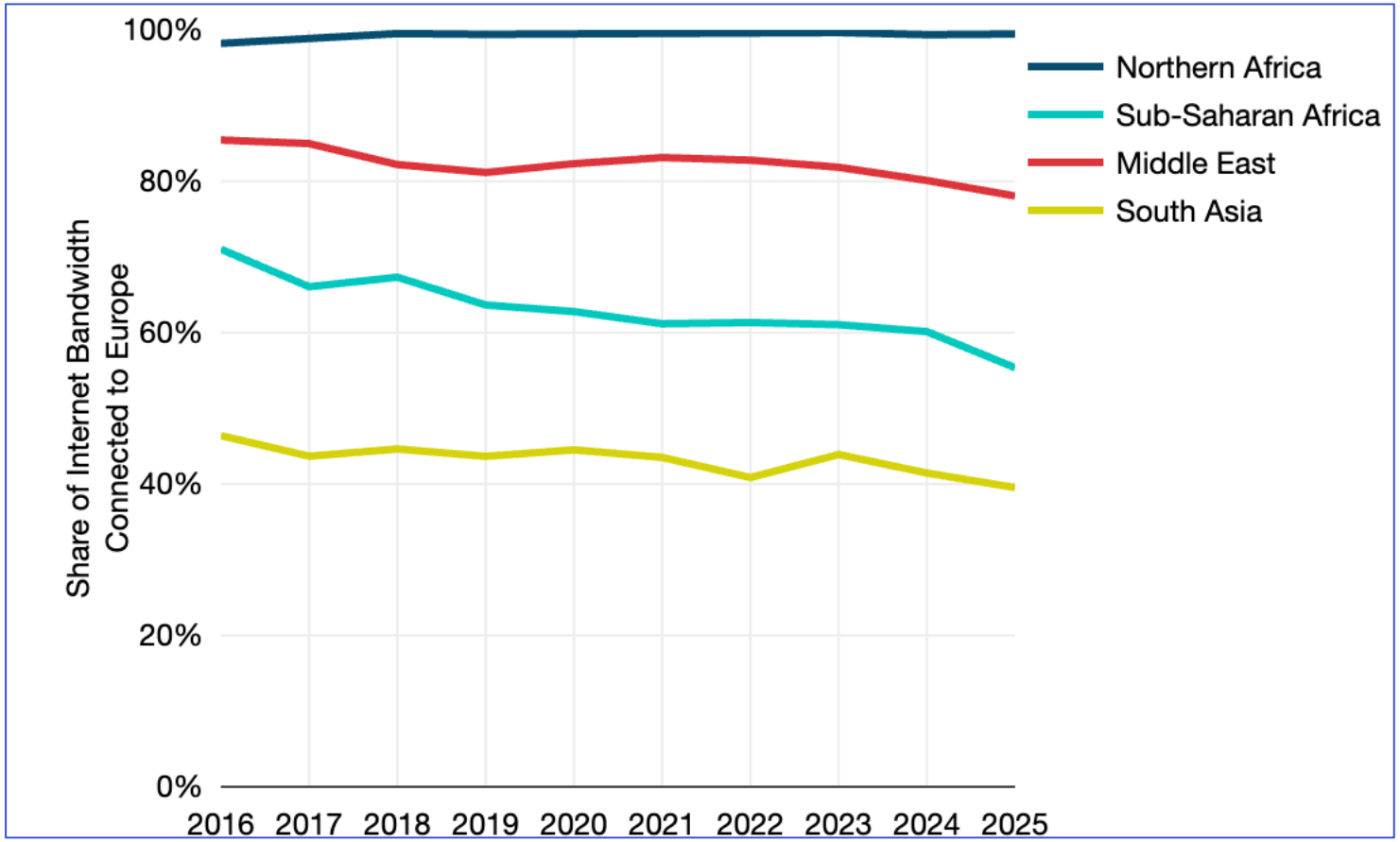
Share of Europe int'l Internet bandwidth



- Share of int'l traffic intra-European is dropping 75% to 70% over last 5 years
- Middle East and Africa increased share
- Asia's share has remained the same
- US & Canada's share has dropped

Source: TeleGeography, IP Networks

Europe as a hub

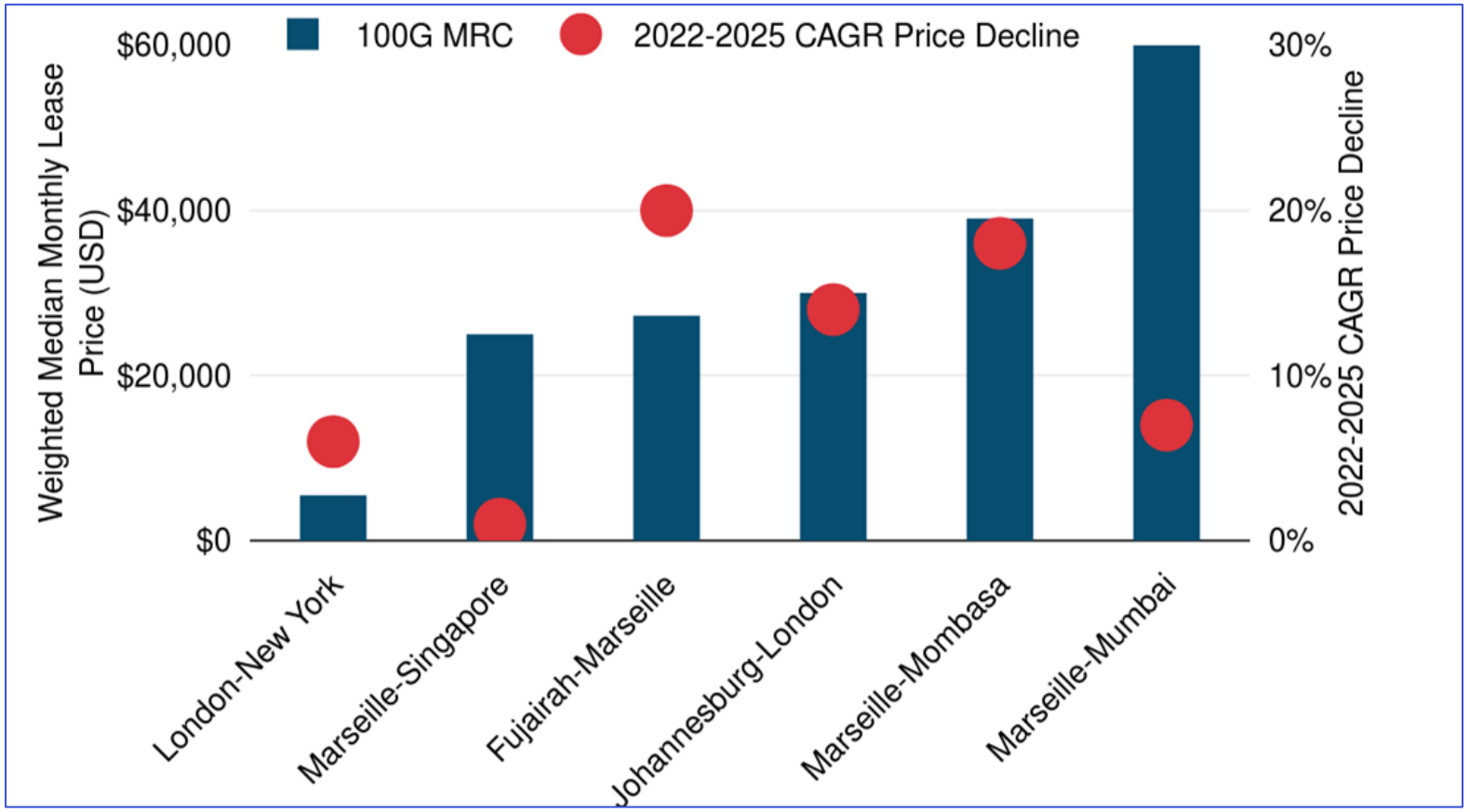


- Top 3: North Africa, Middle East then Sub-Saharan Africa
- Total Africa-Europe connectivity has hovered around 80% for the pas 5 years
- North Africa's international connectivity is almost 100% to Europe, SSA 60%
- Middle East above 80% more than 10 years

Source: TeleGeography, IP Networks

Global price decline continues at 100 Gbps

Weighted Median 100 Gbps Wavelength Prices & CAGR Price Decline on Global Routes



Source: TeleGeography's Network Pricing Database

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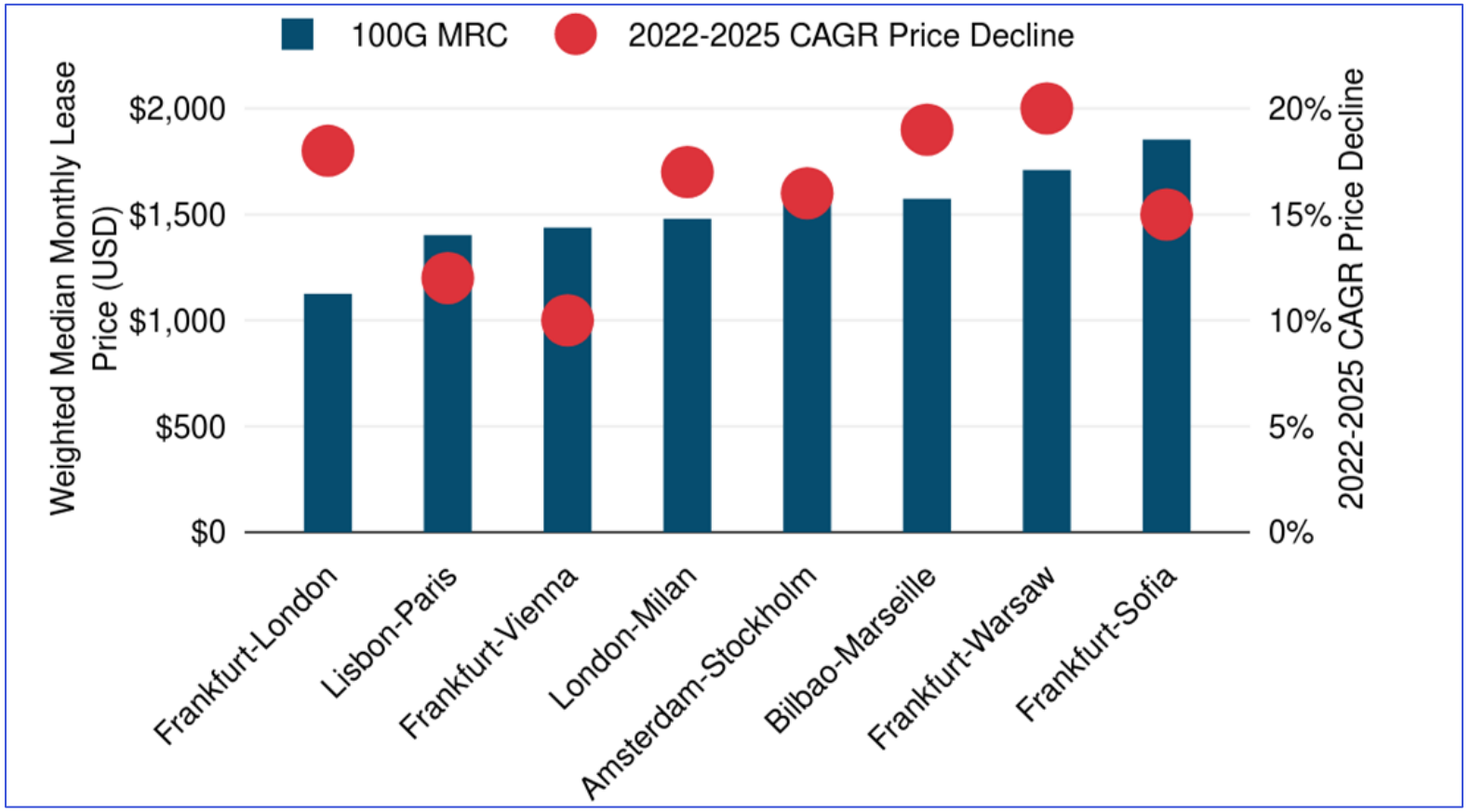
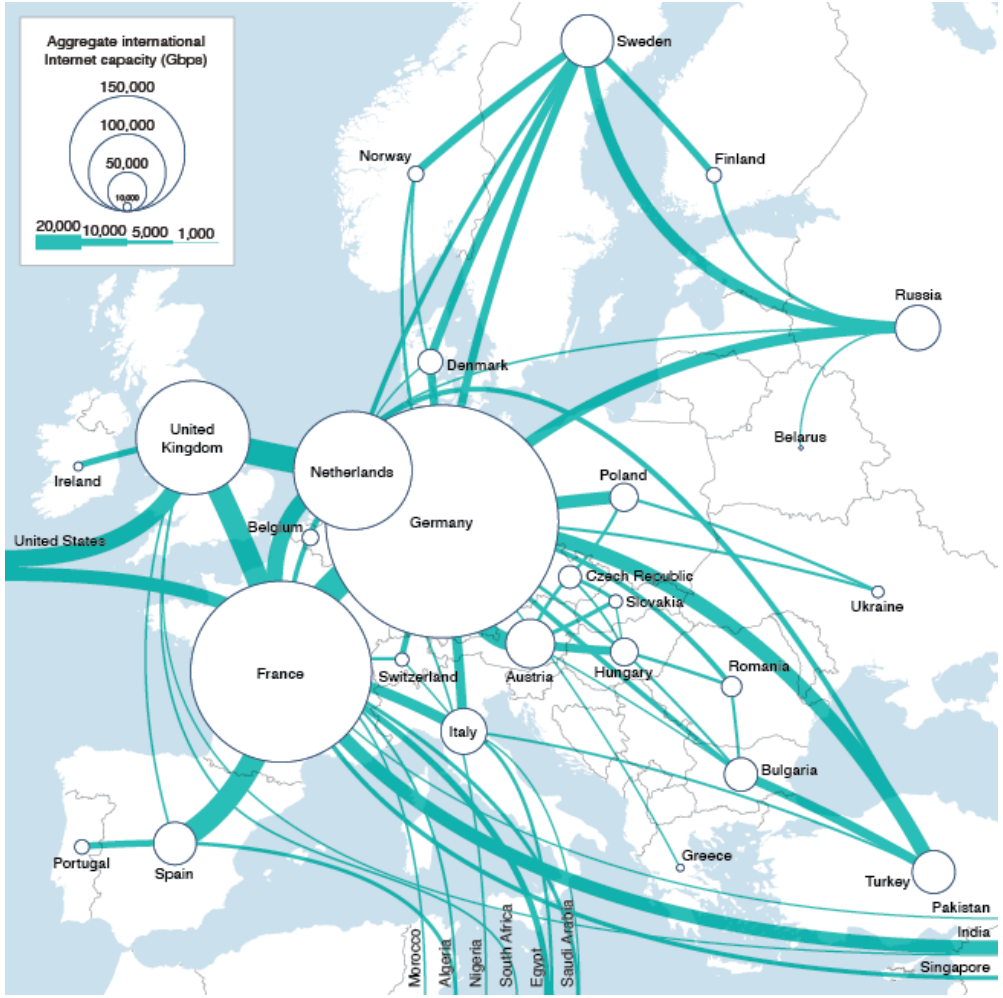


Source: TeleGeography's Network Pricing Database

Europe intra-regional trends

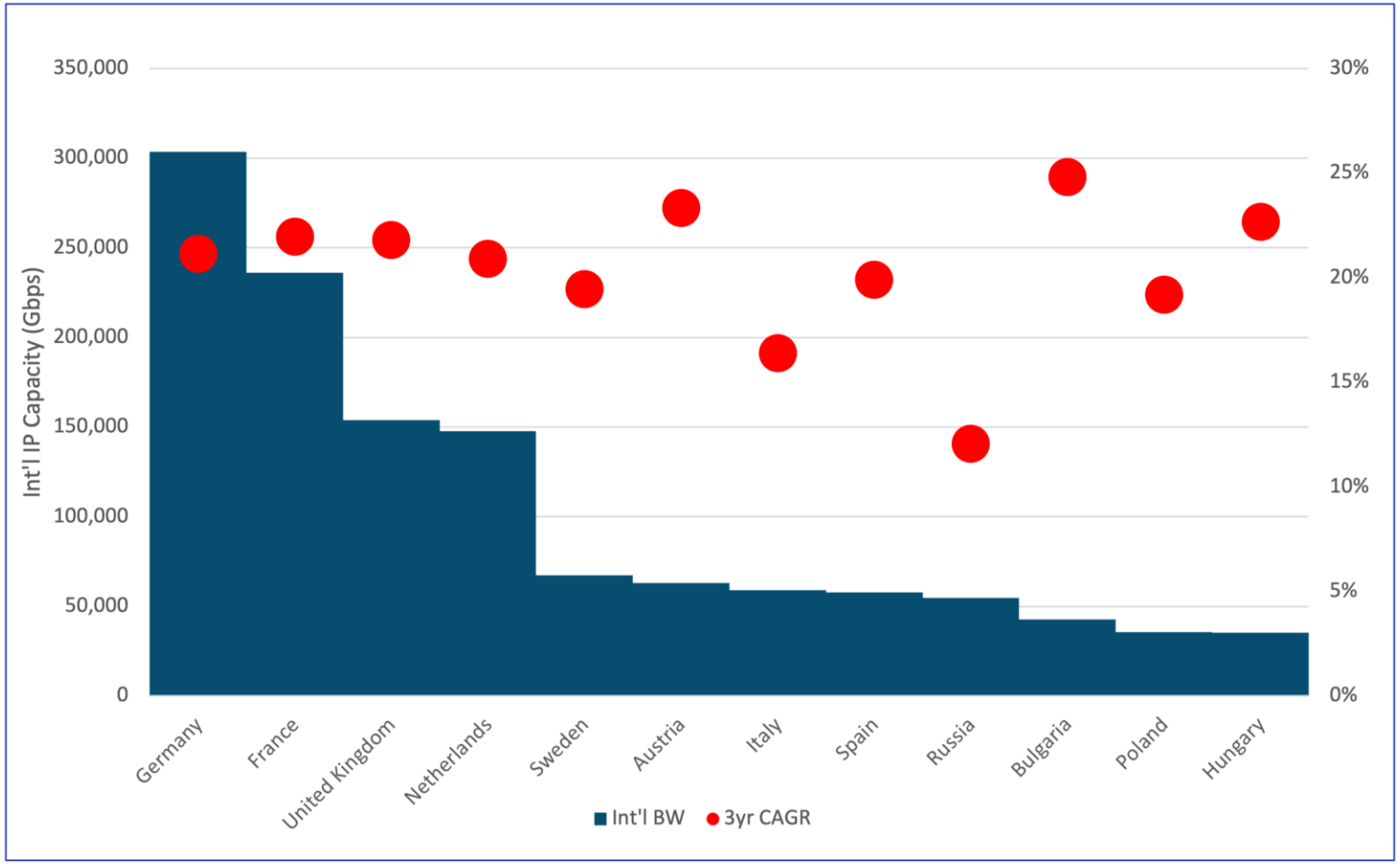
Europe’s top int’l routes



- Intra-European routes continue to be the largest routes
- Largest routes between FLAP countries
- Inter-regional route growth-mainly from the North Africa and the Middle East
- To a lesser degree sub-Saharan Africa
- Lisbon/Portugal however big growth from South and West Africa

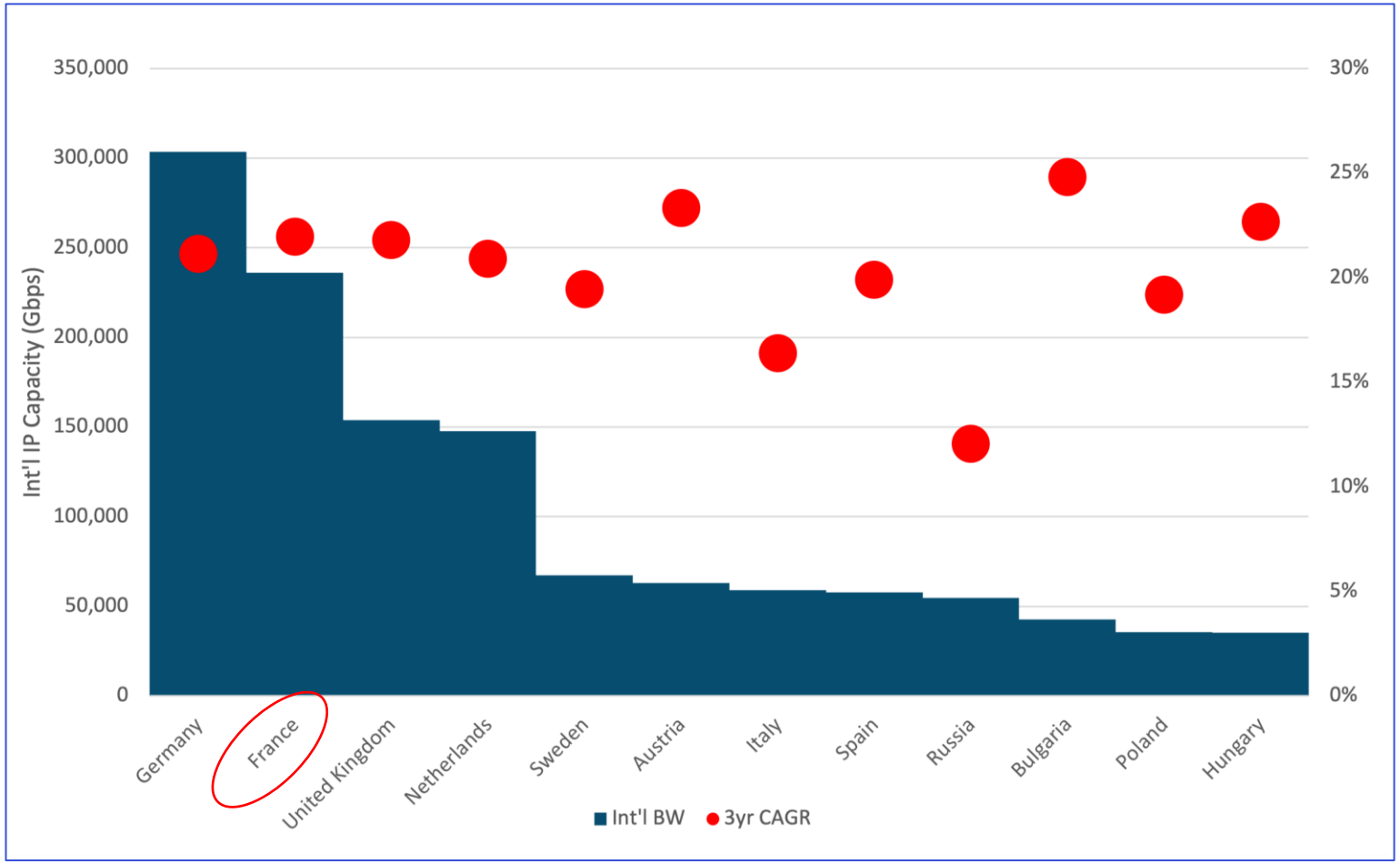
Source: TeleGeography, IP Networks

Top countries int’l IP capacity in Europe



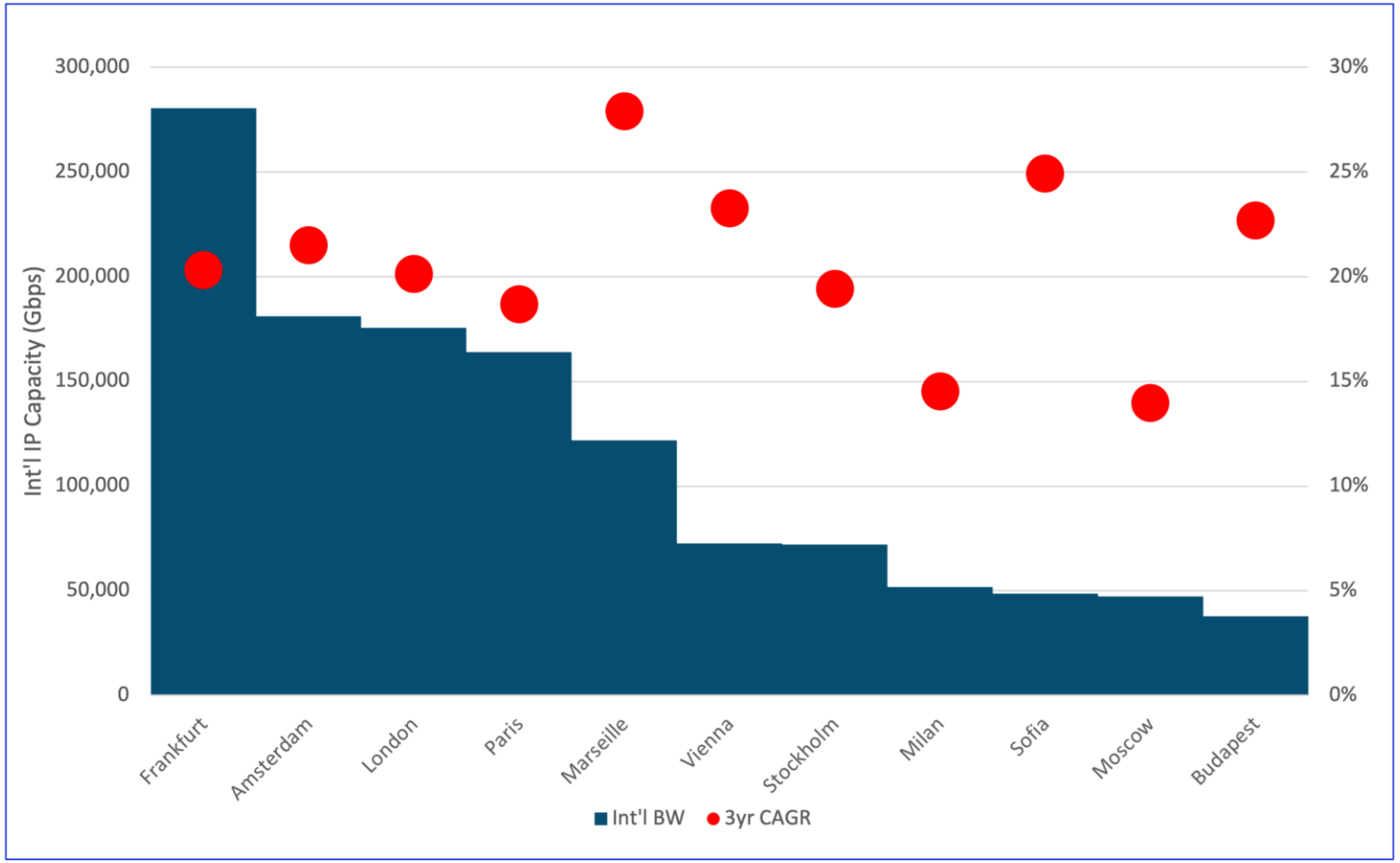
Source: TeleGeography, IP Networks

Top countries int’l IP capacity in Europe



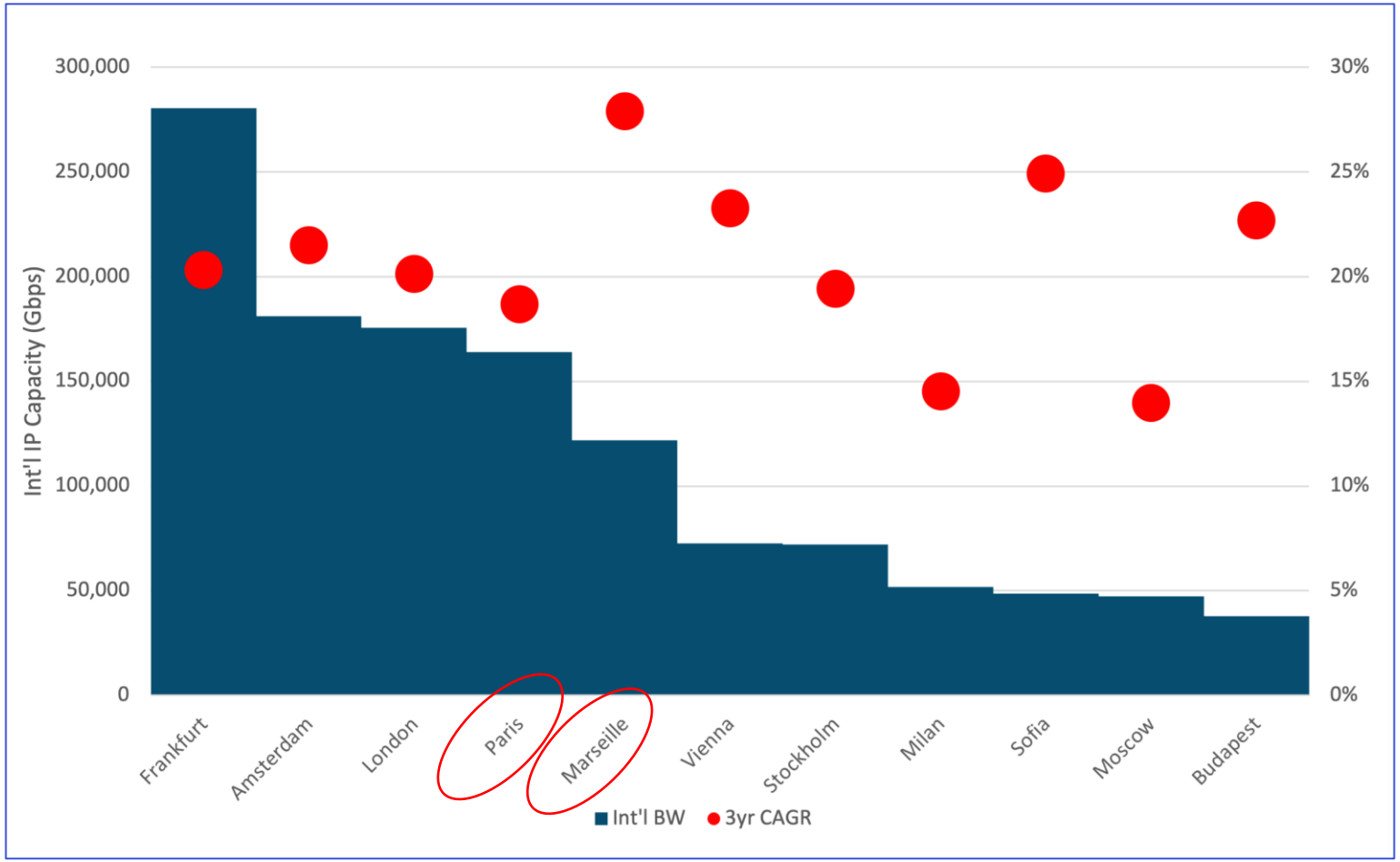
Source: TeleGeography, IP Networks

Top metros int’l IP capacity in Europe



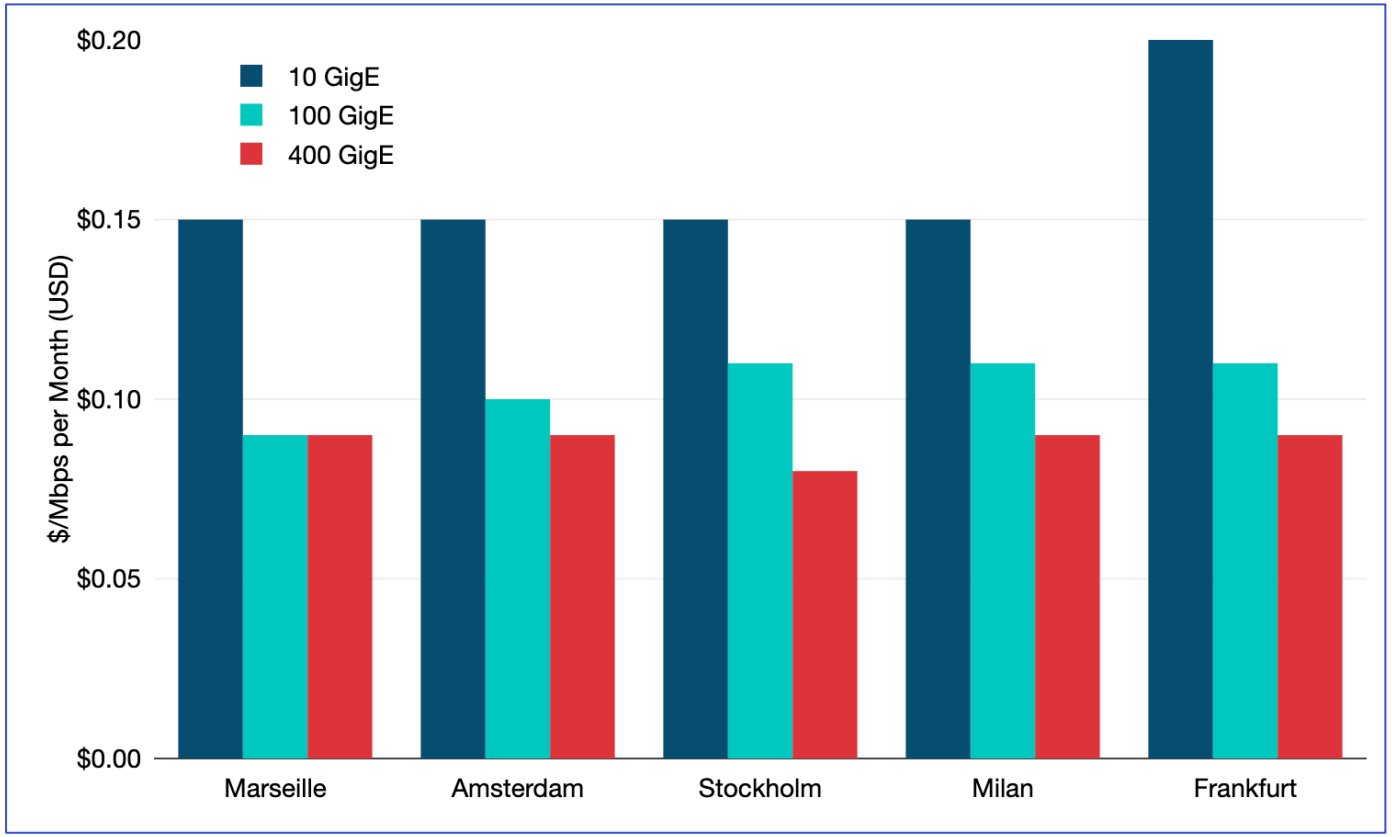
Source: TeleGeography, IP Networks

Top metros int’l IP capacity in Europe



Source: TeleGeography, IP Networks

100 GigE IP Transit prices in Europe



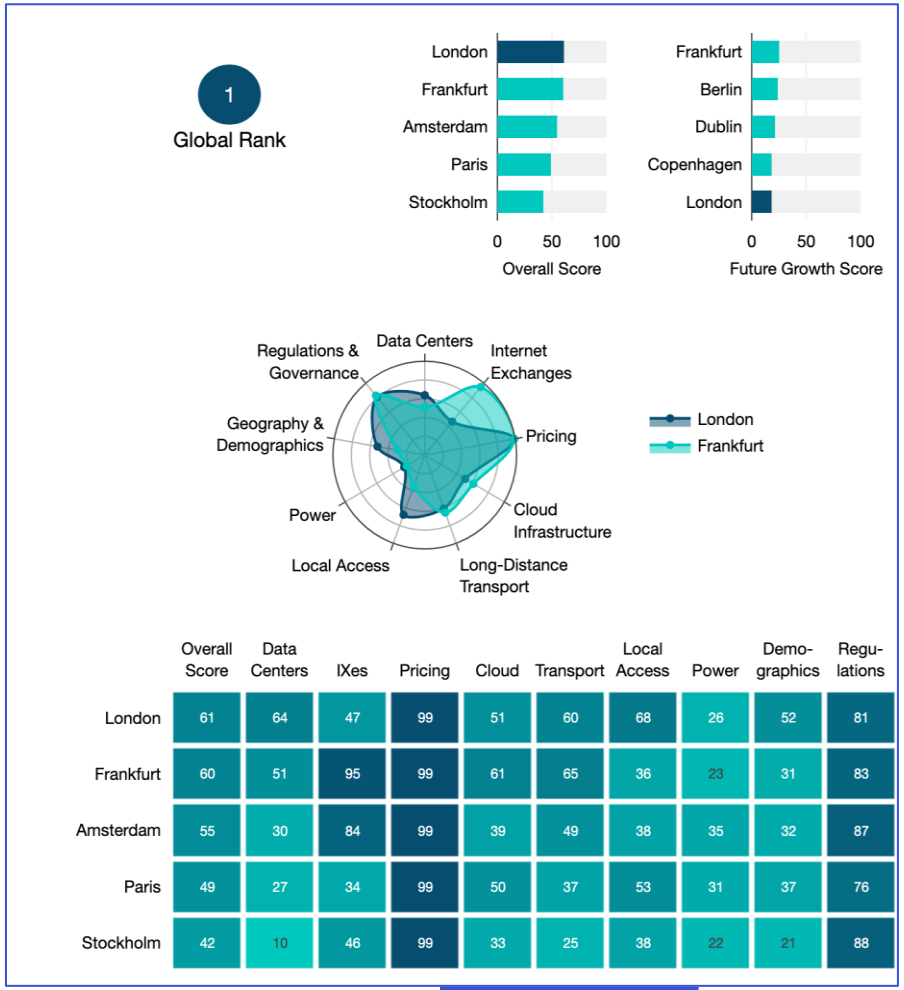
- Trend is pretty clear: the larger the port, the greater the price advantage per unit
- 400 GigE demand has just begun to unfold slowly
- 100 GigE ports are the predominant product in Europe, but it's worth noting that 10 GigE is still relevant in the sales mix

Source: TeleGeography, IP Networks

Interconnectivity hubs

A tool to diagnose market health

The Market Connectivity Score captures 45 distinct market health metrics to help users diagnose the competitiveness of 3,000 global network and data center markets.



	Overall Score	Data Centers	IXes	Pricing	Cloud	Transport	Local Access	Power	Demo-graphics	Regu-lations
London	61	64	47	99	51	60	68	26	52	81
Frankfurt	60	51	95	99	61	65	36	23	31	83
Amsterdam	55	30	84	99	39	49	38	35	32	87
Paris	49	27	34	99	50	37	53	31	37	76
Stockholm	42	10	46	99	33	25	38	22	21	88

Source: TeleGeography's Data Center Research Service

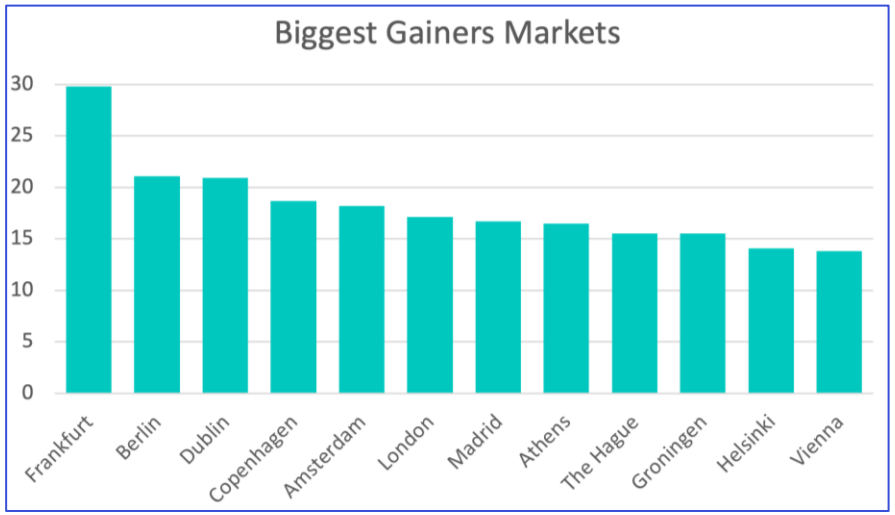
European connectivity hubs

Top ranking

- Frankfurt
- London
- Amsterdam
- Paris
- Stockholm

Biggest gainers

- Frankfurt
- Berlin
- Dublin
- Copenhagen
- Amsterdam



Source: TeleGeography, Data Centers

Top European connectivity markets

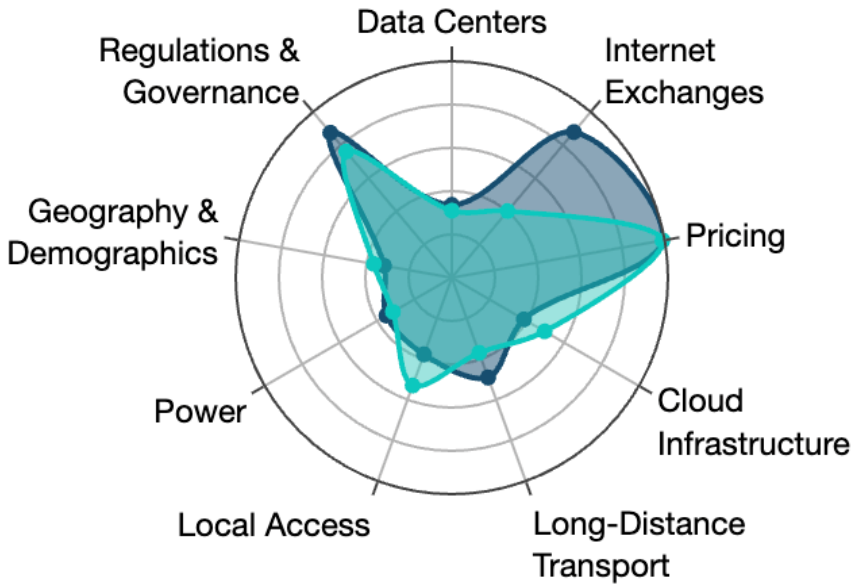
Overall European Rank	Data Center Rank	Cloud Infrastructure Rank	Internet Exchange Rank	Long-Distance Transport Rank
1. London	⭐ 1	⭐ 3	8	⭐ 2
2. Frankfurt	⭐ 2	⭐ 1	⭐ 1	⭐ 1
3. Amsterdam	⭐ 3	6	⭐ 2	⭐ 3
4. Paris	6	⭐ 4	25	⭐ 5
5. Stockholm	12	7	9	6
6. Madrid	9	⭐ 2	42	16
7. Milan	7	⭐ 5	56	9
8. Marseille	29	11	22	⭐ 4
9. Helsinki	15	9	⭐ 4	10
10. Copenhagen	14	13	18	13

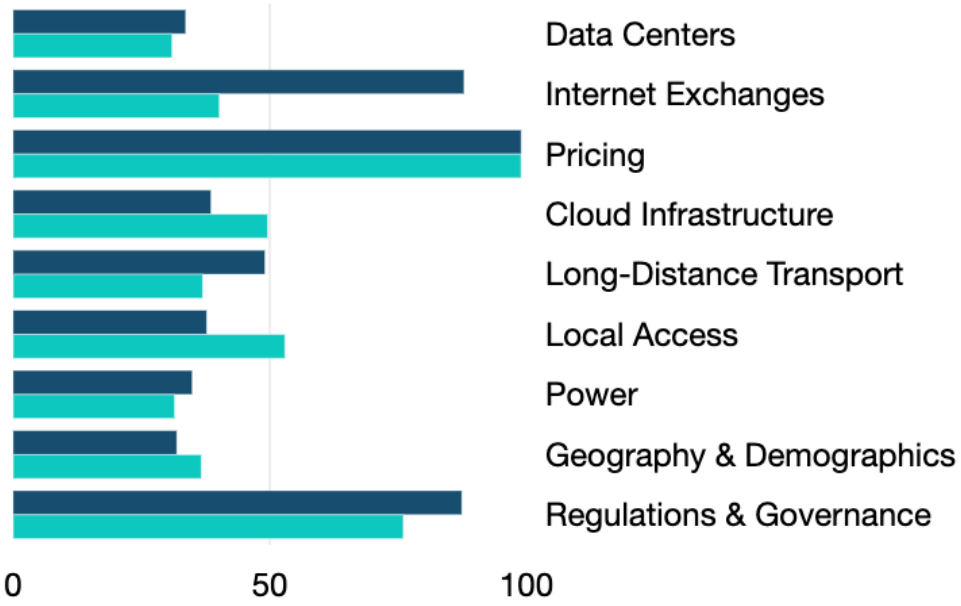
Source: TeleGeography's Data Center Research Service

Note: The ⭐ object is used to highlight top-five regional rankings for the given category

European interconnection hubs

Amsterdam vs. Paris

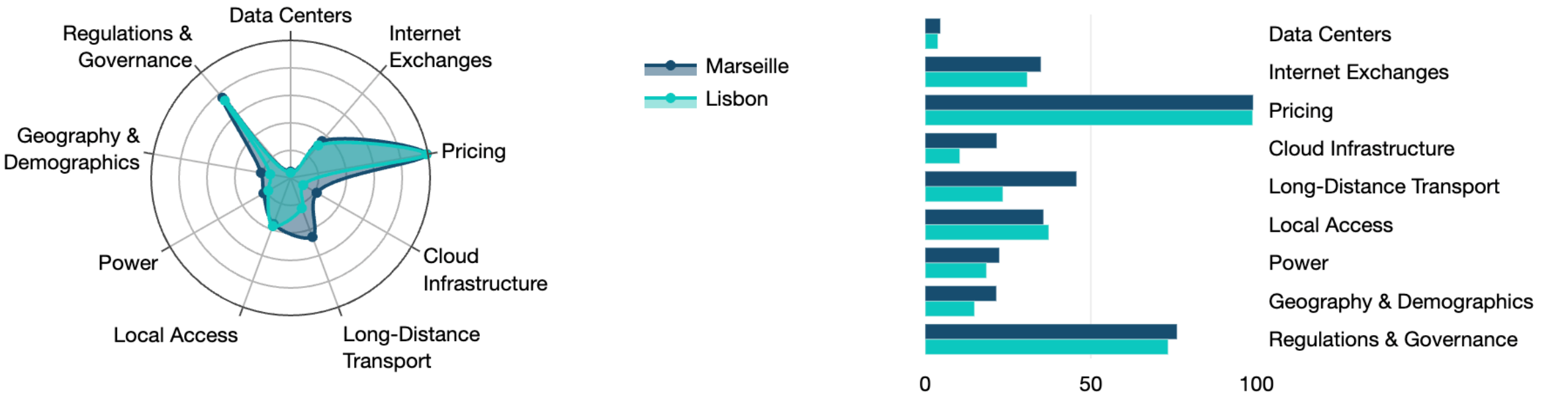




Source: TeleGeography, Data Centers

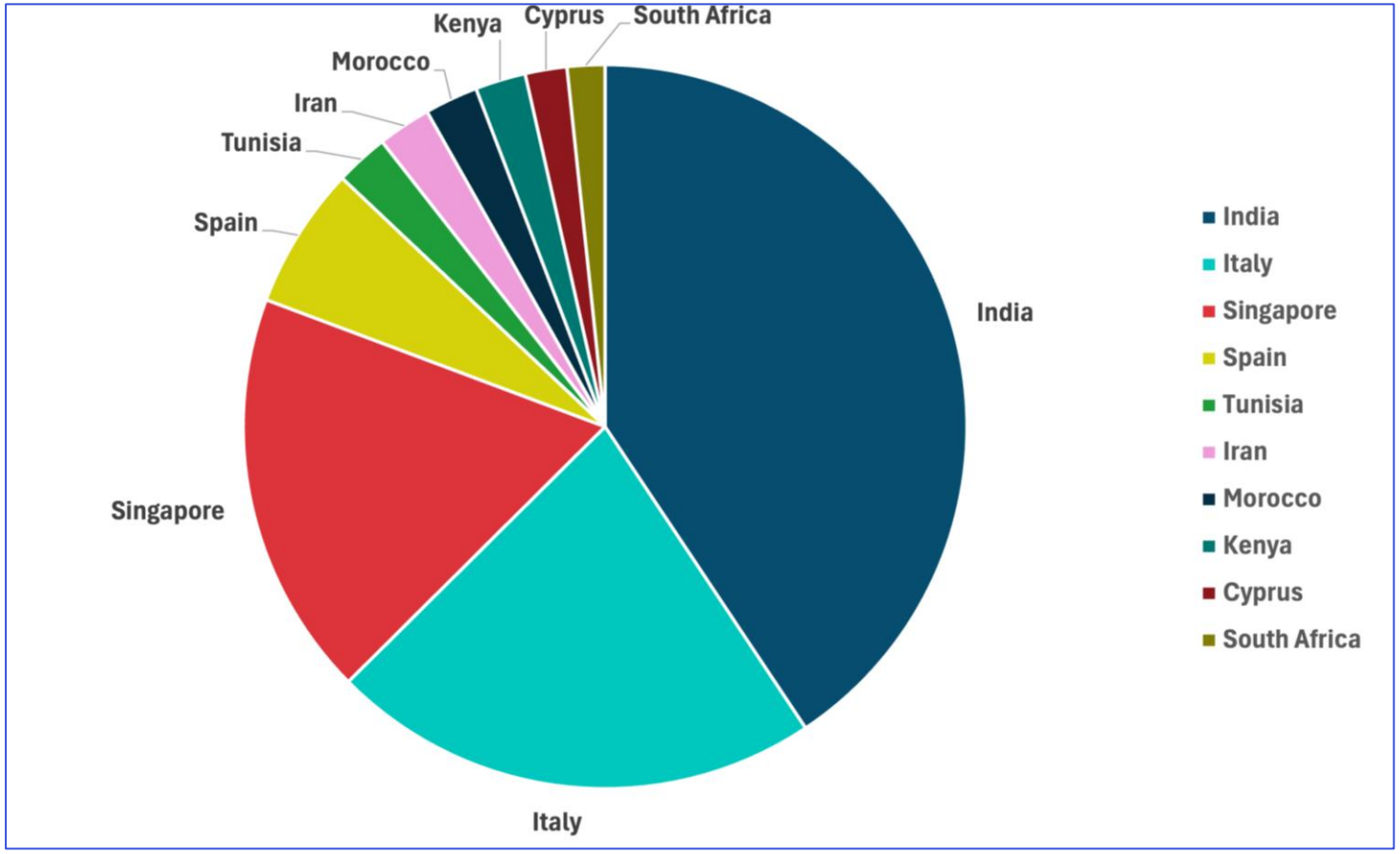
European interconnection hubs

Marseille vs. Lisbon



Source: TeleGeography, Data Centers

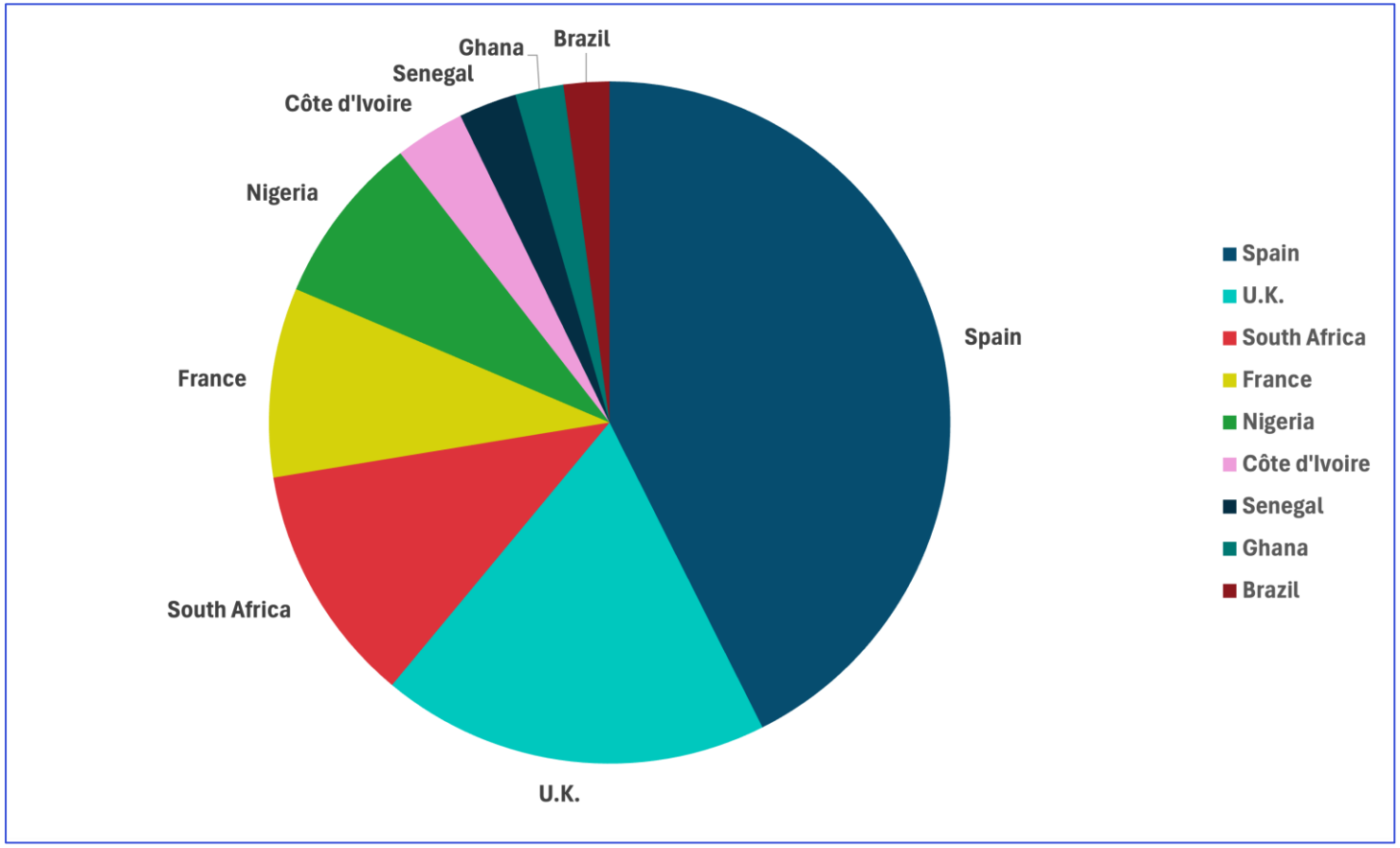
Marseille int'l connectivity



- Just over half of int'l capacity connected to Asia
- Almost 10% connected to Africa
- About 30% connected to Europe
- Italy and Spain connectivity mostly terrestrial

Source: TeleGeography, IP Networks

Lisbon int'l connectivity



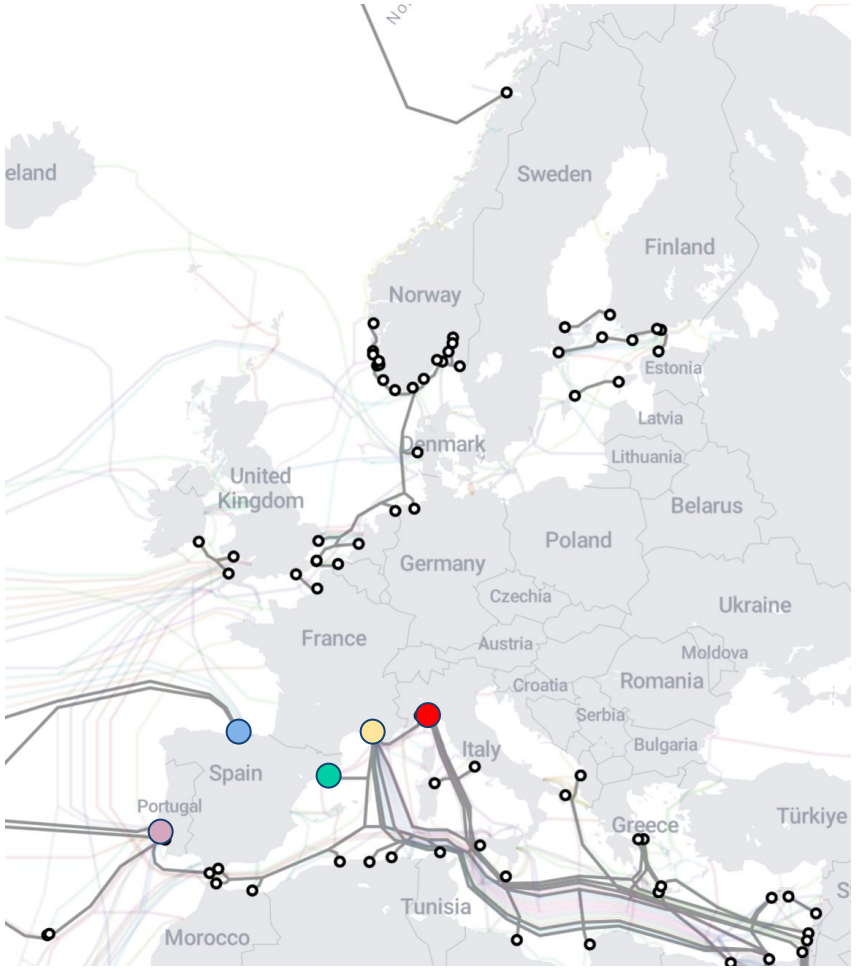
- About 60% connected to Europe
- About 1/3 connected to Spain
- About 30% connected to Africa
- Spain and France connectivity mostly terrestrial

Source: TeleGeography, IP Networks

Planned submarine cables

TeleGeography's Submarine Cable Map: Planned Cables

- Bilbao
- Barcelona
- Genoa
- Marseille
- Lisbon



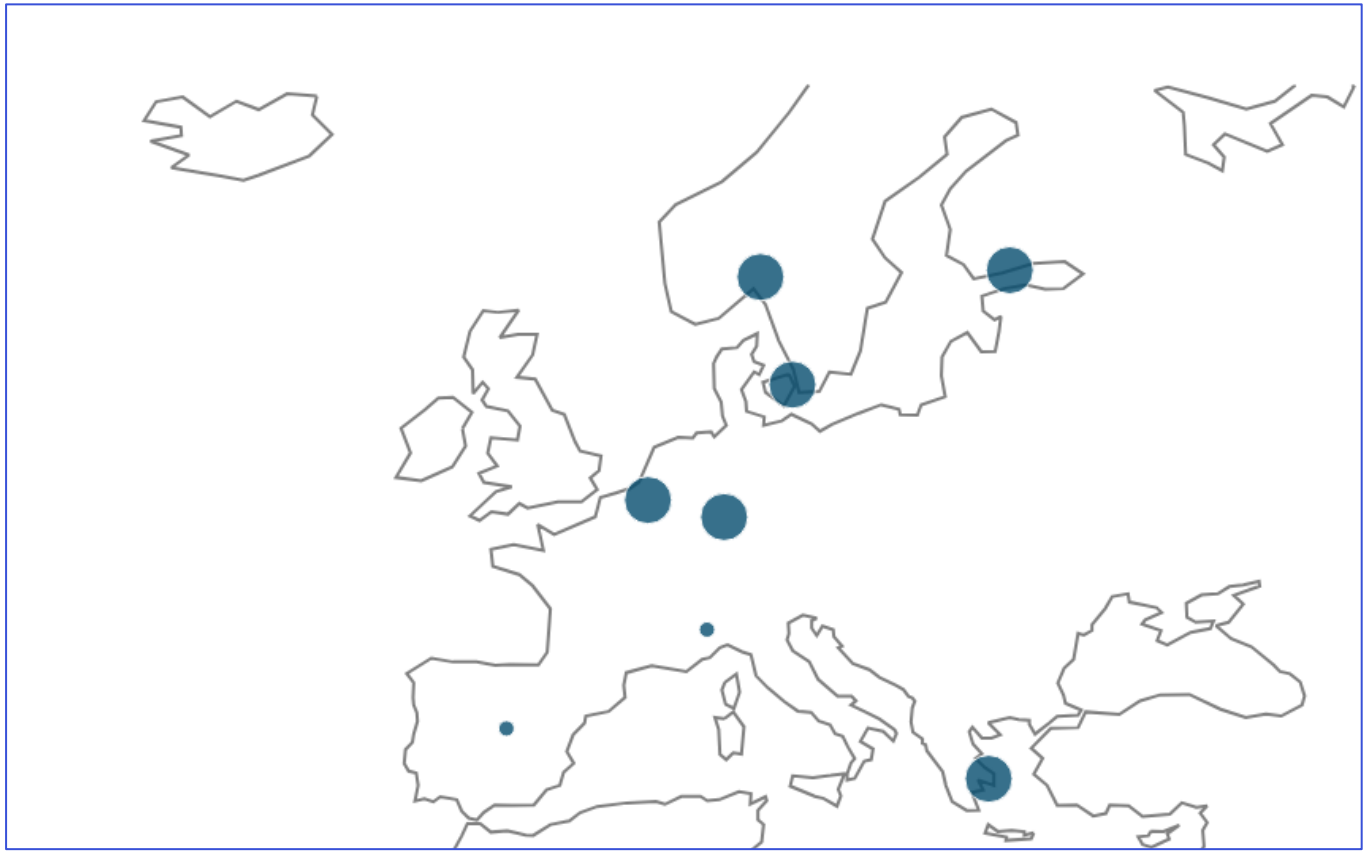
Planned and recent cables:

- 3 trans-Atlantic cables
- 11 North Sea/Norwegian Sea/Baltic Sea cables
- 3 English channel cables
- 6 Mediterranean cables
- 7 Europe-ME-Africa-Asia cable systems planned in coming years

Note: Map displays publicly announced planned cables.

Source: TeleGeography, Transport Networks

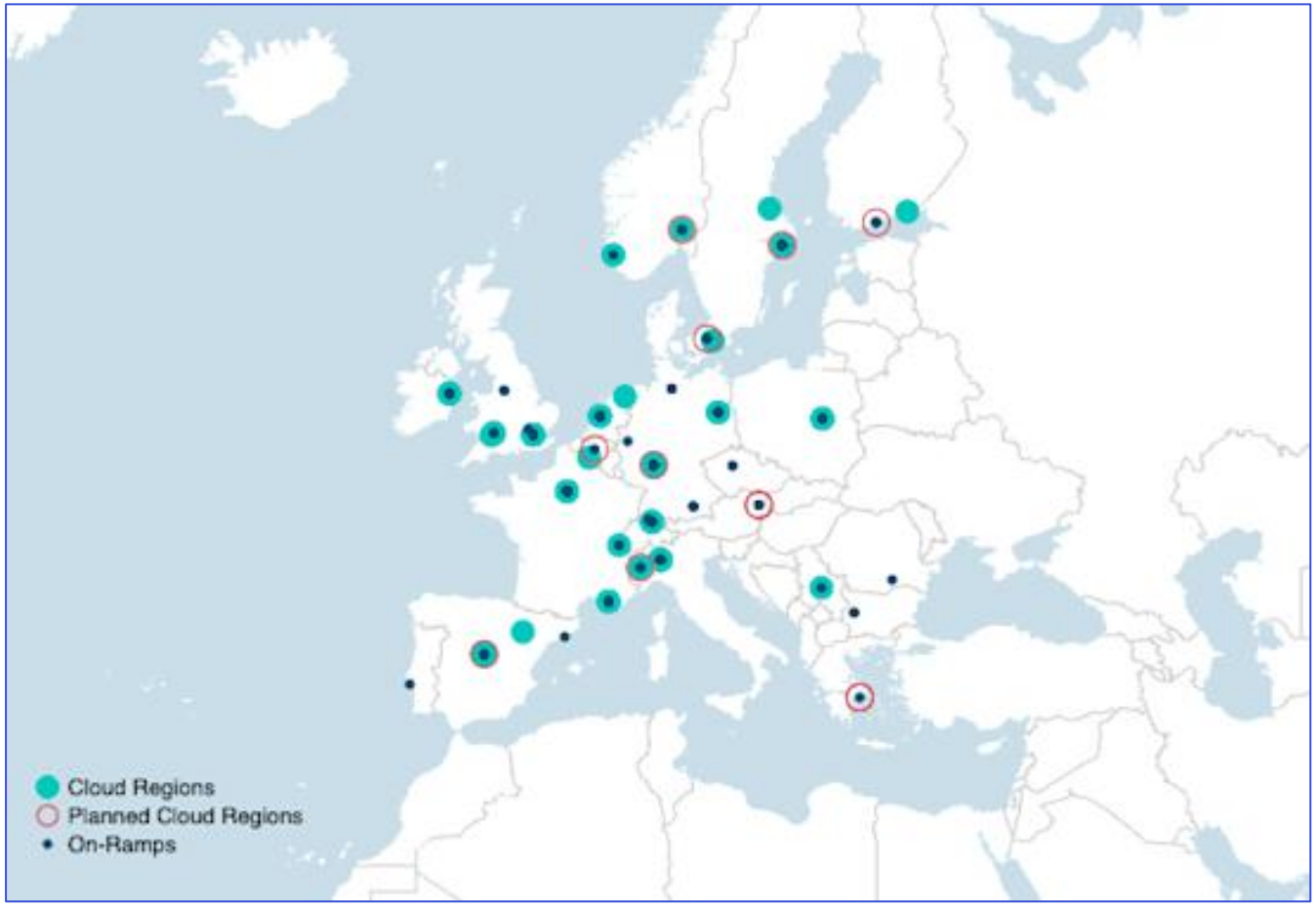
Europe’s planned Cloud regions



- 10 planned (or recently launched) Cloud regions
- Half of those are in the Nordics
- Vienna launched and Athens soon

Source: TeleGeography, Cloud and WAN

Europe’s Cloud landscape



- 69 live and 8 planned Cloud regions
- Germany has the most regions – 11 live and 1 planned
- UK is #2 with 11 live
- Europe added the most new Cloud regions in 2023 (8) but only 2 in 2024 & 2025

Source: TeleGeography, Cloud and WAN

Looking ahead

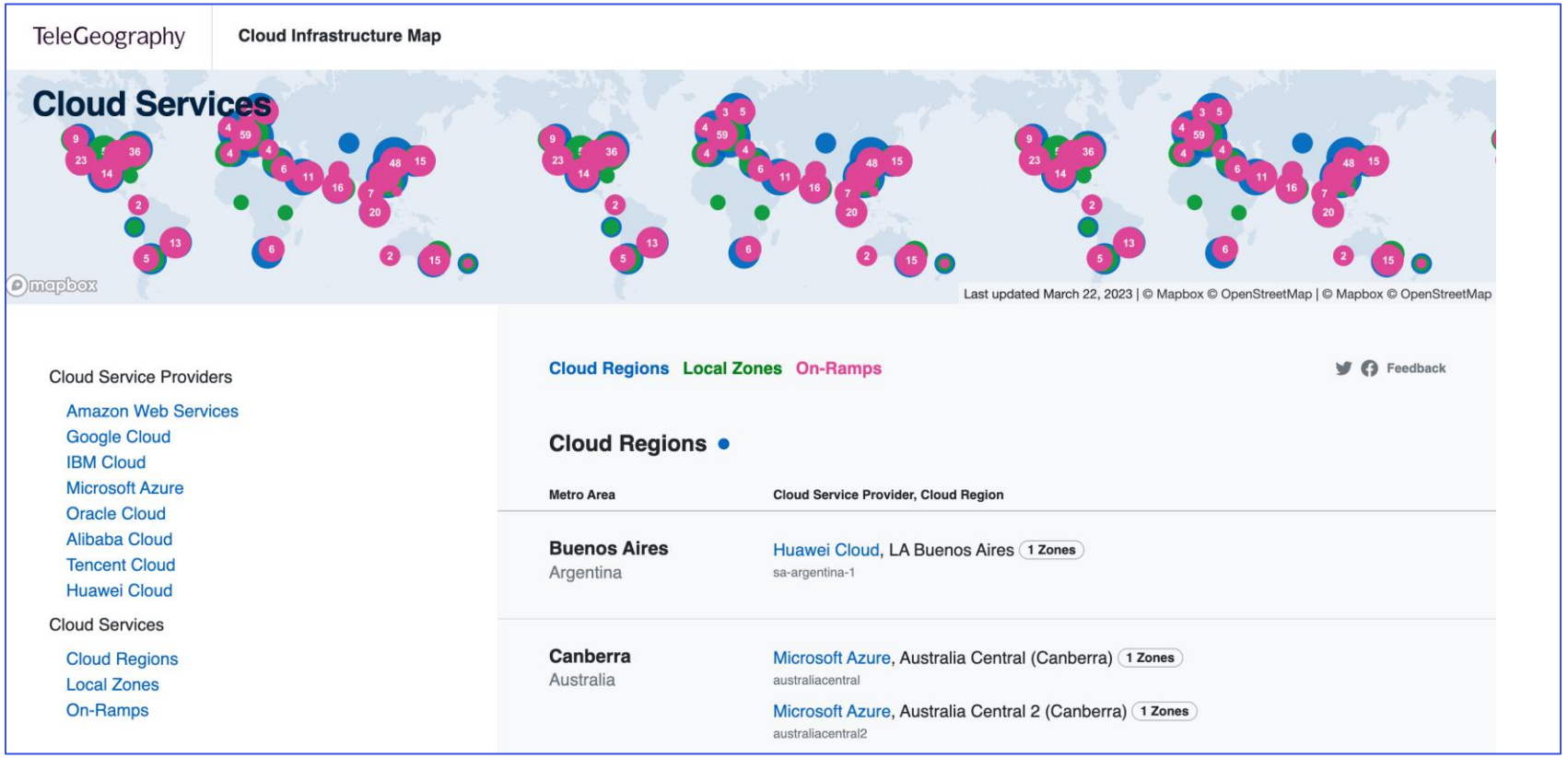
Southern Europe – Fasting growing region, will continue

- **Marseille** still dominates as a hub and entry point into Europe from Asia, ME, Africa but Portugal and Spain are growing
- **Southwest (Portugal, Spain)** – entry point to Europe from Africa, North America, Med (25% growth)
- **Southeast (Greece, Bulgaria, Turkey)** slightly slower than east Portugal still high growth (24% growth)
- New routes and Cloud data center builds in these regions

Northern Europe – Slightly lower growth

- More mature and DC rich region, and will continue to add Cloud regions

Have you seen the Cloud infrastructure map yet?



https://www.cloudinfrastructuremap.com

https://www.submarinecablemap.com (yeah, you know this one)

Any questions?
Thank you!

Patrick Christian - Senior Research Manager
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