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Real value in a changing world

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National overview

Data center highlights | Mid-year 2011

Increasing demand driving national data center growth

Building on a strong 2011 national and international data center market, the later half of 2011 expects to see significant server growth as evidenced by increased consumer and business demand. Due to the thawing of capital markets, providers of data center space & services along with enterprise users are now able to make decisions after years of pent-up demand. Induced with increased deal volume, the supply of new and existing capacity has opened the door for consolidations, relocations, technology / equipment overhauls and new data center initiatives.

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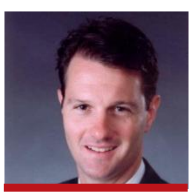
Data Center Solutions contacts

Practice leads



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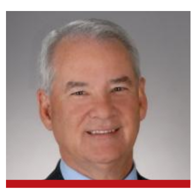

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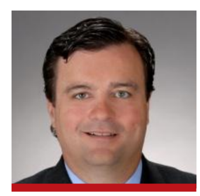

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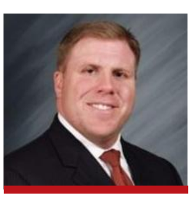

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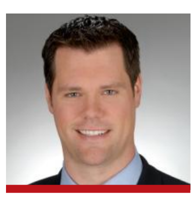

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National market overview

Increased technological enhancements of blade servers, cloud offerings and virtual software solutions are driving users of data center space to rework their current data center strategies and portfolios. Both private and public sector consolidation efforts have been 'top of mind' with most of the providers of these services (wholesale, retail, disaster recovery/business continuity, shared/managed/dedicated hosting, interconnection providers, etc) in the first half of 2011. With the thawing of capital markets, there is an increasing amount of available capital for companies (providers and enterprises) to access to support white floor expansion.

Through the first quarter of 2011, the data center market invokes a classic supply/demand imbalance. On the demand side, Jones Lang LaSalle's Data Center Solutions team estimates that over half of the Fortune 1000 companies will increase IT spending in 2011. Based on internal research, overall IT spending will increase by at least 5%; a quarter increase from 2010. IT specific spending will come primarily from increases in data center infrastructure components, i.e. servers and software to support cloud and virtualization.

As power consumption in data centers continues to increase, the biggest market driver has become energy. Users are increasingly concerned with power redundancy, capacity and cost; with all three driving location strategy.

REGIONAL MARKET HIGHLIGHTS

Midwest

- Demand is driving increased absorption. There is approximately 35 MW of demand remaining in the Chicago area alone.
- Over 10 MW of users secured data center or colo space in 2010.
- In other areas of the Midwest, approximately 15 MW of users have secured data center or colo space (i.e. Ascent Data Center, Digital Capital, et al).
- Wholesale supply is limited at about 45 MW. One or two large enterprise deals could significantly impact this supply and create a supply / demand imbalance.
- Two Fortune 100 companies made large investments in data centers utilizing 6+ MW's of power
- Lightbound delivered an 8 MW data in Indianapolis in July
- Minneapolis (Eagan) joint venture development of a 100,000 SF data center with Five 9's Digital LLC approved in April

Northeast

- The financial service industry continues to be the cornerstone of this regional market followed by the Hosting, Media, Pharmaceutical, Retail and Telecom.
- DuPont Fabros Technology opened its first New Jersey facility at the end 2010. Sentinal Data Centers is opens its first New Jersey facility in 2011.
- In Boston, Paetec added the 42,000SF of colo space.
- i/o just committed to 800,000 SF – a former NY Times printing facility
- Equnix started construction on a 320,000 SF expansion to add to its Secaucus portfolio. (Will be able to accommodate 2,200 server racks.)

Southeast

- Southeast US continues to be a top location alternative for large Enterprise users with companies such as American Express, Apple and Facebook making announcements within the last 12 months.
- Many East Coast companies are transitioning and moving south to take advantage of cheap, accessible power paired with strong incentive packages.

Resources: Jones Lang LaSalle, Data Center Solutions, Gartner Research, Tier1Research
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National market overview

West Coast

- Due to the lower power costs and superior service levels of Silicon Valley Power, Santa Clara's public utility, new demand has been directed specifically to the Santa Clara; a submarket of Silicon Valley.
- San Diego is experiencing significant growth and new demand has pushed for approximately 4 MW of new construction.

Northwest

- Demand increases as users look to take advantage of the temperate climate by utilizing outside air economization to increase efficiency and reduce costs
- Multiple landlords are actively searching for development opportunities – specifically in the Puget Sound, Eastern Washington & Portland, OR area
- Massive colocation growth in Seattle to satisfy the robust high-tech/biotech industry

Southwest

- Large telco's (Windstream & CenturyLink) continue to acquire and finalize (Hosted Solutions, Qwest, SAVIS, etc.) target data center-centric acquisitions
- Dallas / Ft Worth has experienced growth requirements from various industries with demand projected to grow at an average rate of 13% thru 2014, placing a burden on an already constrained market.
- Phoenix is experiencing significant demand and has taken approximately 25 MW of capacity from 2010 - 2011.

WHAT TO LOOK FOR

- Wide adoption of Cloud Service by SMB's
- Worldwide Debt Crisis will negatively affect future data center development
- Multiple expansions in the top 6 US data center markets of new data center developments by many of the larger providers
- Speculative data center developments will occur by real estate developers that are new to the marketplace….look for winners and losers!
- Private equity will continue to invest heavily into the marketplace
- Continued IPO interest in the sector
- Incentive packages for large data center projects are in question due to the health of current State budgets
- Further growth in the tablet/smart phone market (and associated apps) will contribute to greater data center consumption
- Increased importance on latency
- N configurations to support non-critical functions
- Deal velocity in Santa Clara will counter balance the growing inventory

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Chicago

Data center highlights | Mid-year 2011

Power costs	
Capacity – COLO	
Capacity – Enterprise	
Absorption – COLO	
Absorption – Enterprise	
New construction (SF)	
New construction (price/SF)	
Rental rates – COLO	
Rental rates – power / shell	
Incentives	

Ascent – Chicago IL

Arrows represent change from prior quarter

Data center overview

- Chicago's international appeal has continued to attract new large corporate HQ's such as Groupon, Tate & Lyle, Navistar, UAL, BP and MillerCoors
- This growth has increased demand for data center space, with companies such as Comcast 1.8 MW; taking down wholesale space
- Over 10 MW of users secured data center or COLO space in 2010 and another 20 MW of users are active in metro Chicago
- Additionally there are a number of national collocation providers and developers that have considered expansion into the Chicago market, such as Rackspace expanding by an estimate 2.5 MW
- Metro Chicago has seen an increase in supply as over 40 MW of new wholesale / COLO and powered shell is available in Downtown Chicago and over 20 MW of new wholesale / COLO and powered shell in Suburban Chicago

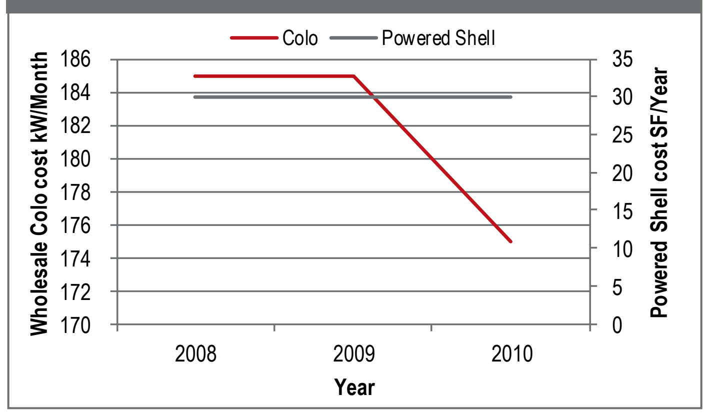
Significant data center transactions

Comcast	Wholesale	1.8 MW
Fidelity Information Systems	Renewal	70,000 SF
Rackspace	Expansion	2.5 MW
Latysis	Expansion	40,000 SF
Confidential Pharmaceutical	Wholesale	4.2 MW

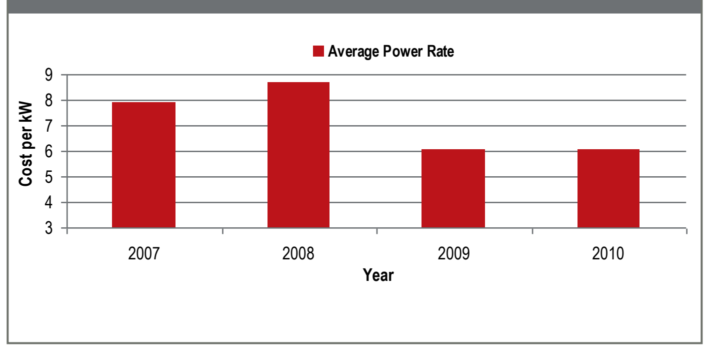
Significant availabilities

DFT - Phase 2	COLO	18 MW
Ascent - Phase 2	COLO	30 MW
CoreSite	COLO	4 MW
CoreLink	COLO	8 MW
Latisys	COLO	4 MW

Average rental rates



Multi-year power



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Dallas | Ft. Worth

Data center highlights | Mid-year 2011

Power costs	↓
Capacity – COLO	↓
Capacity – Enterprise	↑
Absorption – COLO	↑
Absorption – Enterprise	↑
New construction (SF)	↑
New construction (price/SF)	↑
Rental rates – COLO	→
Rental rates – power / shell	→
Incentives	↑

Blue Cross Blue Shield
Dallas | Ft. Worth TX

Arrows represent change from prior quarter

Significant data center transactions

CSC	New	1 MW
ViaWest	New	90,000 SF
Equinix	Expansion	50,000 SF
Fiserv	New	2 MW
Morgan Stanley	New	1.1 MW
Internap	New	130,000 SF

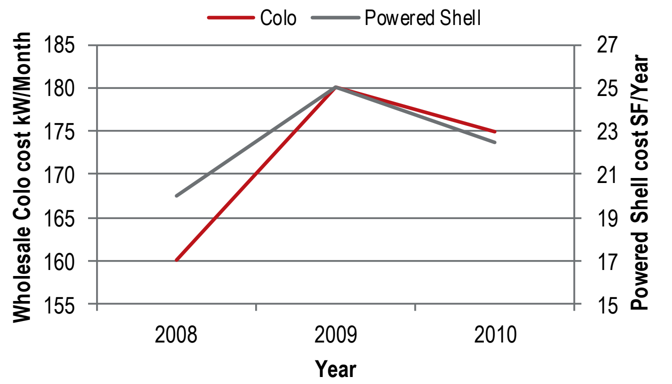
Significant availabilities

3000 Skyline	Powered Shell	750,000 SF
ViaWest	COLO	40,000 SF
Lincoln / RH	Powered Shell	150,000 SF
CyrusOne	COLO	5 MW
BlueCross BlueShield	COLO	4-8 MW
Digital Realty Trust	COLO	7 MW

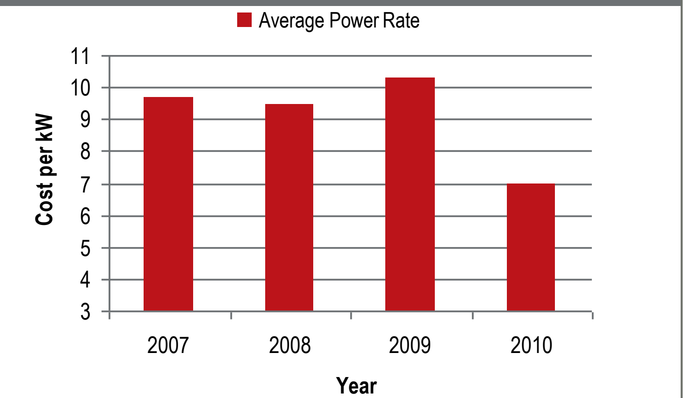
Data center overview

- Strong business climate and robust infrastructure make this area a Top 6 US market
- Approved in June, Texas HB 1841 states businesses using internet hosting in the state do NOT establish a business presence "nexus" in the state thus freeing hosting and data center operations from collecting sales and use taxes from their customers
- Demand is projected to grow at an average rate of 13% thru 2014, placing a burden on an already constrained market
- Rental rates softened in the early part of 2011 as landlords competed to land tenants prior to new construction hitting the market
- The single-tenant enterprise market was strong as build-to-suits delivered in Allen and Ft. Worth
- 2011 outlook is an increasingly limited supply to meet the demand until the new construction is completed in mid 2012

Average rental rates



Multi-year power



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Los Angeles

Data center highlights | Mid-year 2011

Power costs	↑
Capacity – COLO	↑
Capacity – Enterprise	↓
Absorption – COLO	↑
Absorption – Enterprise	→
New construction (SF)	↑
New construction (price/SF)	→
Rental rates – COLO	↑
Rental rates – power / shell	↑
Incentives	→


Latisys – Irvine CA

Arrows represent change from prior quarter

Data center overview

- As a result of activity from the entertainment enterprises and others including financial and professional services, COLO companies are benefitting and continuing to expand in Downtown Los Angeles
- 444 Nash was sold to T-5 Partners MCF, which is demolishing the original building and constructing a new 85ksf tilt-up with steel roof structure. The first conditioned pod will be delivered in 2Q2012.
- Some hospitals are planning for data center expansions that may involve a partial outsourcing of their IT operations while they plan enterprise level expansions
- Power rates continue to rise from most utilities (LADWP and Southern California Edison) in the area, with the exception of some that are owned by separate municipalities (Burbank, Glendale and Pasadena)
- Rates for COLO space have stabilized to current levels ranging between $100 to $150 per kW on a net comparable basis. Subject to market conditions, including demand, rates in the buildings that are trading will likely increase

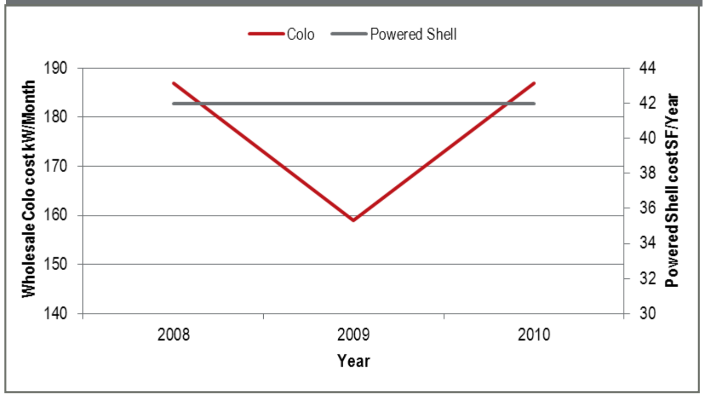
Significant data center transactions

Alchemy Communications	Bldg Lease	40,000 SF
LinkedIn	Wholesale	50,000 SF
China Telecom	COLO	5ksf/500kW

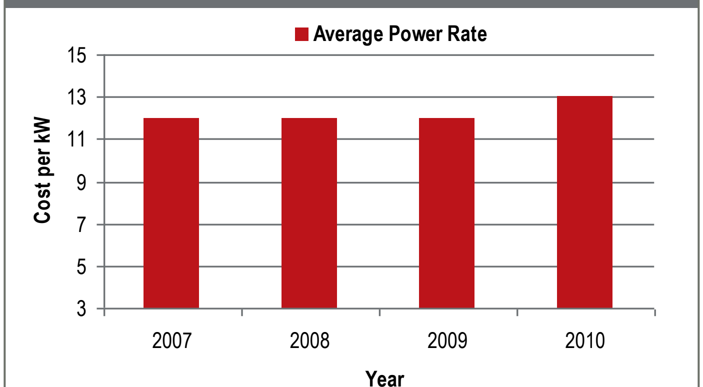
Significant availabilities

444 Nash St., El Segundo, CA	Powered Shell Tier III Consolidated	23 MW
Latisys - 17400 Von Karman Ave., Irvine	COLO	20 MW
Streaming Media Hosting, 2641 LaPalma, Anaheim	COLO	7 MW

Average rental rates



Multi-year power



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New York | New Jersey

Data center highlights | Mid-year 2011

Power costs	→
Capacity – COLO	↑
Capacity – Enterprise	→
Absorption – COLO	↑
Absorption – Enterprise	→
New construction (SF)	↑
New construction (price/SF)	→
Rental rates – COLO	→
Rental rates – power / shell	→
Incentives	→

DuPont Fabros – Piscataway NJ

Arrows represent change from prior quarter

Data center overview

- Proximity to Manhattan and robust infrastructure make Northern New Jersey one of the top U.S. markets with over 2M SF of enterprise facilities and over 1.5M multi-tenant facilities
- Market trend continues with strong COLO leasing as companies look to partner and preserve cash flow
- Absolute lack of legacy available enterprise data centers
- Financial service industry continues to be corner stone of the market followed by the pharmaceutical, media, telecom and hosting
- Rental rates softened throughout 2010 as continued economic climate persisted and new wholesale inventory came on line
- DuPont Fabros Technology opened its first New Jersey facility in the fall of 2010
- Sentinal Data Centers opens its first New Jersey facility in Q1 2011
- i/o Data Centers leases 831,427 SF building, and is marketing prefabricated modular data centers
- Digital Realty Trust bringing 20,000 SF of new availability to 300 Blvd E, Weehawken NJ

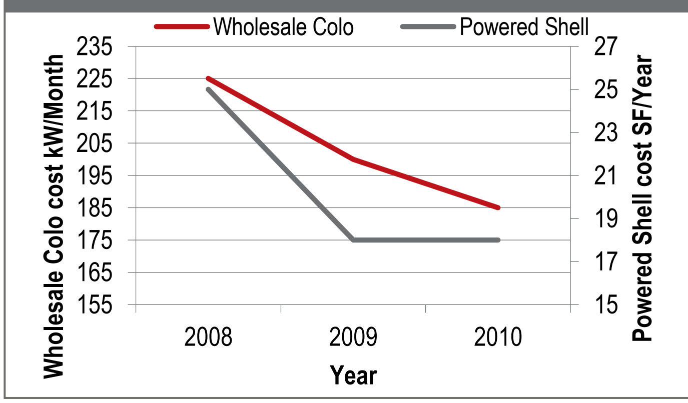
Significant data center transactions

Retail COLO	Expansion	75,000 SF
Financial services	Expansion	1MW
Net2Ez	New	1MW
Pharmaceutical company	New	20,000 SF
Retail COLO	Renewal	38,017 SF

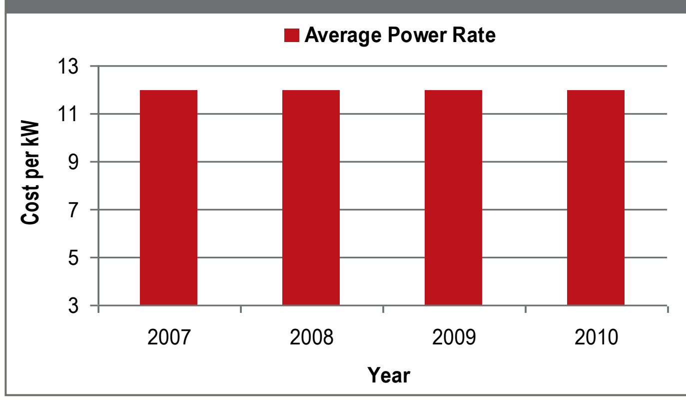
Significant availabilities

Digital Realty Trust - Piscataway	COLO-Powered Shell	22,000 - 60,000 SF
Digital Realty Trust - Somerset	Powered Shell	127,000 SF
Digital realty Trust - Weehawken	COLO	10,000 SF
DuPont Fabros	COLO-Powered Shell	68,900 - 180,000 SF
Sentinel Data Centers	COLO-Powered Shell	10,000 - 120,000 SF
Cervalis	COLO	40,000 SF
i/o Data Centers-Edison	COLO	3 MW

Average rental rates



Multi-year power



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North Carolina

Data center highlights | Mid-year 2011

Power costs	↓
Capacity – COLO	↓
Capacity – Enterprise	↑
Absorption – COLO	↑
Absorption – Enterprise	↑
New construction (SF)	↑
New construction (price/SF)	↑
Rental rates – COLO	↑
Rental rates – power / shell	→
Incentives	↑

Arrows represent change from prior quarter

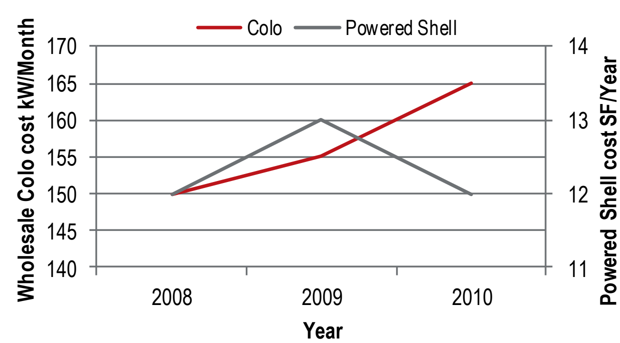
Data center overview

- Wipro Infocrossing purchased their 215,000 SF powered shell for $14.8M
- North Carolina continues to see strong interest from enterprise users
- Reliable low cost power from two very respected utilities has added to North Carolina's allure to data center users
- Demand for enterprise space continues to expand and powered shells are now hitting the market geared specifically to the data center user
- There is little available COLO space which is driving demand for additional space for the hosted solutions providers
- 2011 outlook is increasing limited supply of COLO space until new construction is completed. Powered shell supply will increase with the completion of the 250,000 SF; T5 Kings Mountain in 2Q

Significant data center transactions

Hosted Solutions	Expansion	8,000 SF
TIAA-CREF	COLO	8,000 SF
Wipro Infocrossing	Powered Shell	215,000SF
American Express	New	510,000SF
Facebook	New	$450M

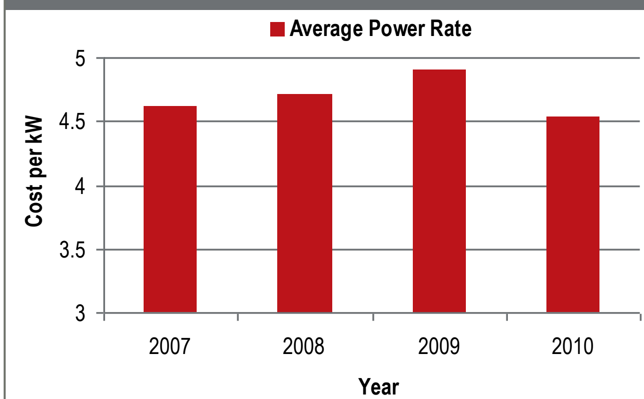
Average rental rates



Significant availabilities

T5 Maiden	Powered Shell	150,000 SF
T5 Kings Mountain II	Powered Shell	150,000 SF
Innovation Park	Powered Shell	300,000 SF
414 N. Church St.	2nd Generation Data Center	27,000 SF
4004 E. Chapel Hill Road	Powered Shell	36,000 SF

Multi-year power



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Pacific Northwest

Data center highlights | Mid-year 2011

Power costs	
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Capacity – Enterprise	
Absorption – COLO	
Absorption – Enterprise	
New construction (SF)	
New construction (price/SF)	
Rental rates – COLO	
Rental rates – power / shell	
Incentives	

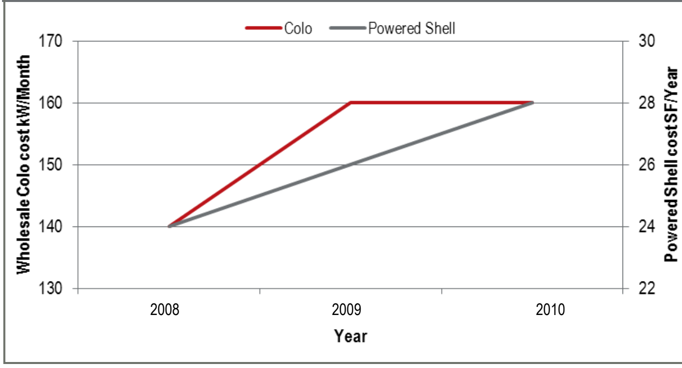
Sabey – Seattle WA

Arrows represent change from prior quarter

Data center overview

- Recent, massive tenant demands have created a shift in the local market and have driven COLO growth
- Limited supply of finished data center product keep demand high
- Over 200,000 SF of COLO expansions in 2010
- 2011 has signaled a potential increase in data center construction, including but not limited to an expansion at the Westin Facility
- Growing number of data center acquisition interest

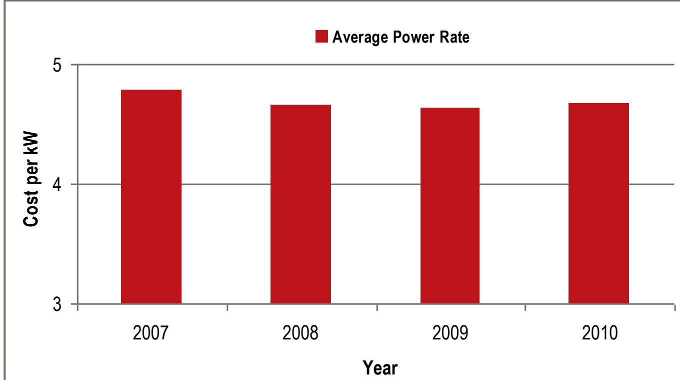
Average rental rates



Significant data center transactions

Amazon	Expansion	50,000 SF
Corelink	Expansion	45,000 SF
Internap	Expansion	40,000 SF
Savvis	Expansion	80,000 SF

Multi-year power



Significant availabilities

Intergate East	Powered Shell	80,000 SF
South Hill Data Center	Fully Commissioned Data Center	60,000 SF
3101 Western Avenue	Existing Data Center	2.6 MW
Stadium Innovation	Powered Shell	6 MW

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Phoenix

Data center highlights | Mid-year 2011

Power costs	→
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Capacity – Enterprise	→
Absorption – COLO	↑
Absorption – Enterprise	↑
New construction (SF)	↑
New construction (price/SF)	↓
Rental rates – COLO	→
Rental rates – power / shell	→
Incentives	→

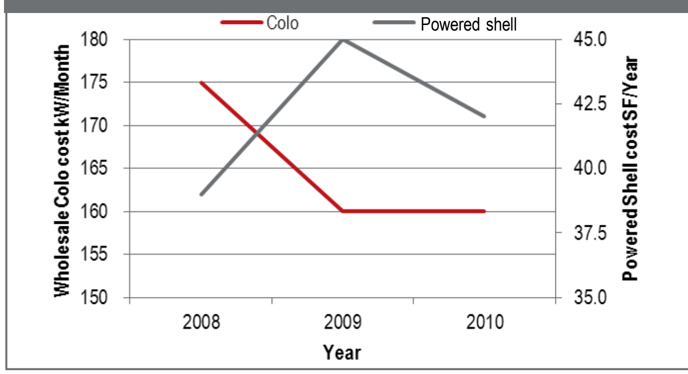
Arrows represent change from prior quarter

i/o Data Center – Phoenix/Scottsdale

Data center overview

- Demand continues to exceed supply in the Phoenix market, currently trading 35 MW of demand
- Approximately 20 MW of critical IT load and 170,000 SF of raised floor can be delivered in 2011
- Cost of power remains steady at approximately $0.069/kWh, an average between the two power providers
- Market rents for wholesale hover at $145 - $175 PkWh range
- New activity in greenfields "spec" development
- Increase in tenant competition for available quality space
- Continued interest from enterprise users in sourcing third-party COLO options
- i/o Data Centers begins production of i/o ANYWHERE modular product at Phoenix plant to be deployed at i/o Phoenix and i/o New Jersey
- Digital Realty Trust Phase II of Chandler facility delivers 1.2 MW pod August 2011. Additional pods delivered November 2011.
- Cyrus One announces new greenfield site

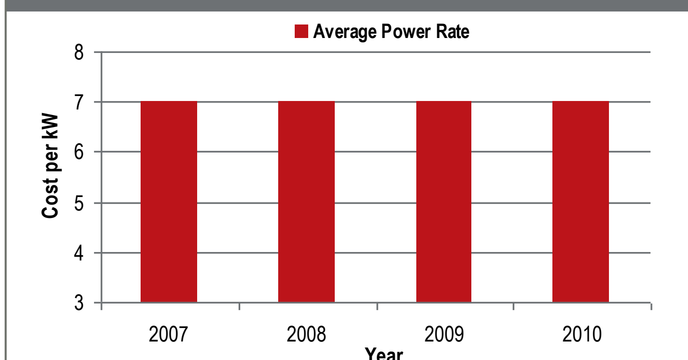
Average rental rates



Significant data center transactions

Expedia	COLO	20,000 SF / 3 MW
Starwood Hotels	COLO	10,000 SF / 1.125 kW
A ECOM	COLO	1,200 SF / 300 kW

Multi-year power



Significant availabilities

Digital Realty Trust – Chandler Phase II 2Q11	COLO	116,000 SF / 13 MW
Phoenix NAP	COLO	45,000 SF / Approx. 4-6 MW
i/o Data Centers XQ11	COLO	175,000 SF shell

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Silicon Valley

Data center highlights | Mid-year 2011

Real value in a changing world

Power costs	↑
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Capacity – Enterprise	↑
Absorption – COLO	↑
Absorption – Enterprise	↑
New construction (SF)	↑
New construction (price/SF)	→
Rental rates – COLO	→
Rental rates – power / shell	→
Incentives	↓


Vantage – Santa Clara CA

Arrows represent change from prior quarter

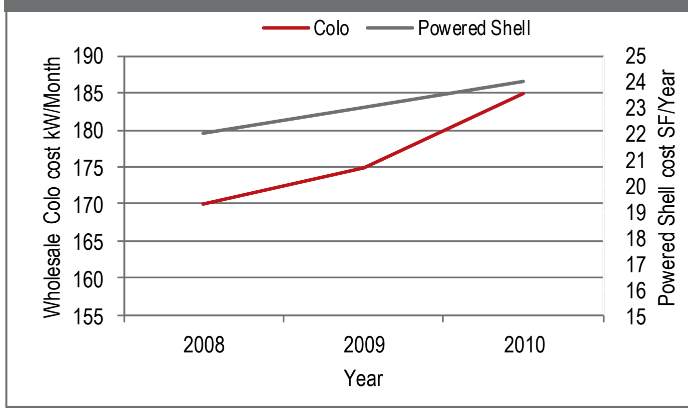
Data center overview

- The Silicon Valley data center market is extremely healthy and has more than weathered the larger economic downturn which looks to be in the past for the Silicon Valley
- Vacancy rates below 5%
- By the end of the 2Q 2011, several new projects will be brought online brining a big jump in capacity to the market; approximately 20 MW, of which it is rumored 50% is already spoken for
- Due to the lower power costs and superior service levels of Silicon Valley Power, Santa Clara's public utility, new demand has been directed specifically to Santa Clara
- A secondary market has arisen in the surrounding cities, serviced by PG&E, for 2nd generation building conversions

Significant data center transactions

Facebook	New	15 MW
Apple	COLO	3 MW
Red Sea Group	New	2.6 MW
Mozilla / Firefox	COLO	1 MW
Groupon	New	18 MW
Savvis	New	10 MW
Zynga	New	5 MW
Dropbox	COLO	1 MW

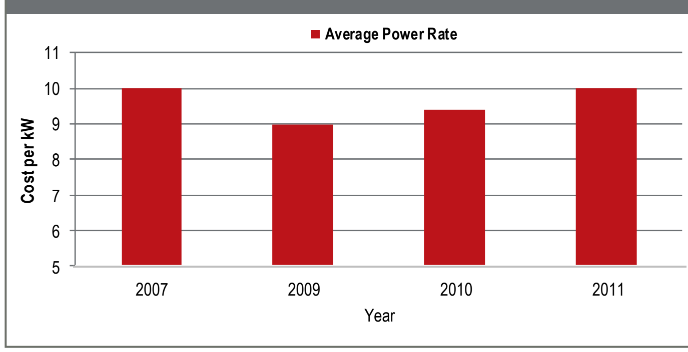
Average rental rates



Significant availabilities

CoreSite	COLO	10 MW+
800 Central Expy (DLR)	COLO	8 MW+
Server Farm	COLO	3 MW
1550 Space Park (DLR)	COLO	6 MW
Vantage	COLO	20 MW+

Multi-year power



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Virginia

Data center highlights | Mid-year 2011

Power costs	↓
Capacity – COLO	↑
Capacity – Enterprise	↑
Absorption – COLO	→
Absorption – Enterprise	→
New construction (SF)	↑
New construction (price/SF)	↑
Rental rates – COLO	↓
Rental rates – power / shell	↓
Incentives	↑

Arrows represent change from prior quarter

Digital Realty Trust – Ashburn VA

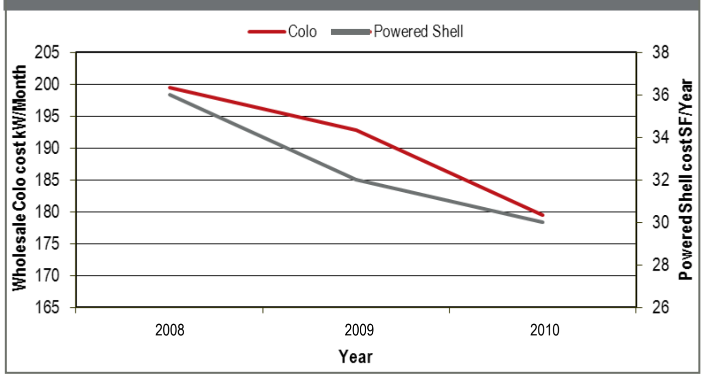
Data center overview

- Ashburn, Virginia continues trend as Top 6 data center market in US for large and small COLO / enterprise market
- 2011 outlook provides excellent opportunity for colocation / enterprise markets given increasing supply and softening rental rates
- Presently over 4.2M SF of purpose built (both wholesale and collocation) data center space has been delivered in Northern Virginia in the past decade
- As of August 2011, the vacancy rate is approximately 8.25%
- Robust government business climate drives colocation / enterprise markets, cloud computing and intelligence community
- iCDC (Intelligence Community Data Center) RFP distributed Spring 2011 for 200k SF raised floor & 50 MW
- Sabey acquires 38 acres in Ashburn, No.VA for future development of 490k SF & 70+ MW
- Amazon acquires 5th building in No. VA, Building E from Digital Realty Trust; Feb. 2011
- QTS opens former Qimonda facility Nov. 2010 in Richmond, VA; 100k SF raised floor & 15 MW available as of July 2011
- Amazon acquires fourth building in No.VA. Sept. 2010; initially 50k SF of raised floor with 11.5MW

Significant data center transactions

Amazon (DLR - Bldg E)	Powered Shell	152,138 SF / 9 MW
Equinix (DLR - Beaumeade)	Powered Shell	77,000 SF / 15 MW
Raging Wire (DBT Ashburn #1)	COLO	109,320 SF / up to 18 MW
ServInt	COLO - Expansion	300kW
Softlayer Technologies	Powered Shell	21,000 SF / 3 MW
Zynga	COLO - Expansion	5,600 SF / 1.138 MW

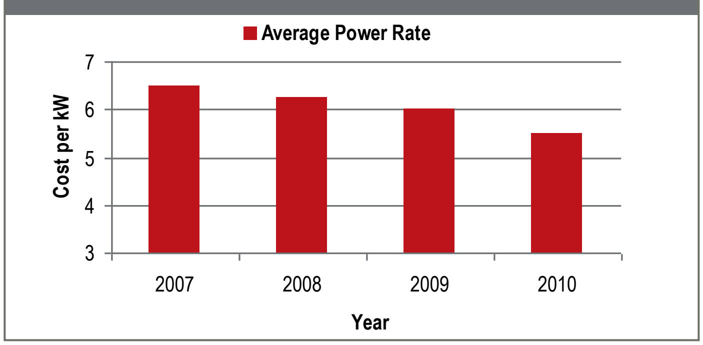
Average rental rates



Significant availabilities

CoreSite (Reston)	COLO	48,000 SF / 6 MW
DBT Telecom 2Q11 (Ashburn #2)	Powered Shell	100,000 SF / up to 20 MW
DFT ACC6 Ph I 4Q11 (Ashburn)	COLO	65,500 SF / 13.46 MW
Digital Realty Trust - Bldg E	Powered Shell	112,000 SF / 22.5 MW
PowerLoft 2Q11 (Manassas)	COLO	72,800 SF / 23 MW

Multi-year power



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About Jones Lang LaSalle's Data Center Solutions

In today's fast-changing business world, a sound data center strategy is essential to the long-term success of an organization. Without sufficient planning to align real estate and IT needs, data centers can account for a tremendous and costly impact on your bottom line–whether you are a user or an owner of this specialized space.

Jones Lang LaSalle is the only real estate firm with a fully dedicated global data center practice. Our Data Center Solutions team has developed the expertise through serving many of the world's largest corporations to deliver maximum value for your organization. Through our transactors, project and critical facilities managers, we understand the technical elements that are crucial to your facility regarding power, cooling, fiber, latency, utilities, redundancy, taxes, construction, public incentives and security.

Whether your goal is to create the most environmentally sustainable enterprise data center or to find the most cost effective hosting or colocation site, we can help design, lease, purchase, finance, build and manage your mission critical facility–and we do so while keeping perfectly in-line with your overall business objectives. For further information, please visit our website www.us.joneslanglasalle.com/datacenters

About Jones Lang LaSalle

Jones Lang LaSalle (NYSE:JLL) is a financial and professional services firm specializing in real estate. The firm offers integrated services delivered by expert teams worldwide to clients seeking increased value by owning, occupying or investing in real estate. With 2010 global revenue of more than $2.9 billion, Jones Lang LaSalle serves clients in 60 countries from 750 locations worldwide, including 180 corporate offices. The firm is an industry leader in property and corporate facility management services, with a portfolio of approximately 1.7 billion square feet worldwide. LaSalle Investment Management, the company's investment management business, is one of the world's largest and most diverse in real estate with more than $41 billion of assets under management. For further information, please visit our website, www.joneslanglasalle.com.

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