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Central and Eastern Europe Data Center Market - Investment Analysis and Growth Opportunities 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Central and Eastern Europe Data Center Market Report

Central Eastern Europe data center market size to grow at a CAGR of over 3% during the period 2020?2025.

Central and Eastern Europe is expected to have more than 365 million internet users and over 2 billion connected devices by 2022. This growth will increase data demand and investments in data centers in the region. ICT and finance and insurance sectors are identified as major end-users in Central and Eastern Europe, contributing maximum growth toward the digital economy. In 2019, Google announced to open a new cloud region in Poland in partnership with Poland's Domestic Cloud Provider (DCP) to accelerate the adoption of cloud services in the country. Cloud computing is one of the fastest growing segments in the IT services market in Poland. The growth in artificial intelligence and the rise of smart cities initiatives taken by governments in countries will increase the demand for edge computing and edge data center deployment in the region. IoT, big data and artificial intelligence are likely to accelerate digitization in Central and Eastern Europe. Central and Eastern Europe is expected to have more than 1.5 billion IoT devices in 2024. Major verticals, which witnessed the largest spend on IoT were manufacturing, transportation, and utilities. The adoption of big data technology is gaining popularity in Central and Eastern Europe with 25% of enterprises using the technology along with analytics. Telecommunication, finance, and utilities sectors are the major end-users deploying big data technology.

The report considers the present scenario of the data center construction market in

central and Eastern Europe and its market dynamics for the forecast period 2020?2025. It covers a detailed overview of several growth enablers, restraints, and trends in the market. The study includes the demand and supply aspect of the market.

Equinix, Conova Communications, IXcellerate, Interxion, Boosteroid, 3data, Datapro, are the prominent investors in the market. The adoption of big data technology is gaining popularity with 25% of enterprises using big data and analytics in Central & Eastern Europe. The market witnessed construction of over 15 new projects in 2019. A significant investment is likely to be made on data center projects during the period 2019?2025. The SaaS segment contributed around 60% to the CEE cloud computing market in 2018. The IaaS and PaaS segments are expected to grow at a CAGR of 30% during the forecast period. Moreover, the implementation of the Data Sovereignty law in Russia will prompt cloud service providers to store personal data within the country, thereby increasing investments by local data center service providers. Also, the GDPR is likely to aid in the growth of the market in other countries in the European region.

KEY HIGHLIGHTS OF THE REPORT

Increase in the adoption of lithium-ion UPS systems will reduce the OPEX of the facility, thereby influencing the market demand.

The contribution from server systems suitable for machine learning and artificial intelligence workloads is expected to grow during the forecast period.

The adoption of diesel generators is high in Central and Eastern Europe, with DRUPS systems gaining traction in the region. The trend is expected to continue during the forecast period.

Metered/Monitored PDUs will experience a strong adoption in the market, which will be overtaken by switched/managed PDUs after 2022. 2N redundant rack PDUs are adopted in the data center market.

Greenfield projects are witnessing increased investments that are likely to offer major income opportunities for general contractors and sub-contractors in the market.

Intelligent security systems such as HD cameras and biometric access are gaining increased traction. These systems are reducing the use of card-based access control in data centers across Central & Eastern Europe.

The need for end-to-end monitoring with DCIM among Central & Eastern European data centers is on the rise.

REPORT COVERAGE:

This report offers a detailed analysis of the central and eastern data center investments in terms of infrastructure and geography. It discusses sizing and estimation for different segments with respect to the investment in data centers. The segmentation includes:

The report segments data center investment by the following areas:

Segmentation by Infrastructure Type

- IT Infrastructure
- Electrical Infrastructure
- Mechanical Infrastructure

By IT Infrastructure

- Server
- Storage
- Network

By Electrical Infrastructure

- UPS
- Generators
- Transfer Switches and Switchgears

Rack PDUs

Other Electrical Infrastructure

By Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chiller Units

Cooling Towers & Dry Coolers

Economizers & Evaporative Coolers

Other Units

Racks

Other Mechanical Infrastructure

By General Construction

Building Development

Installation and Commissioning Services

Building Design

Physical Security

DCIM

By Tier Segments

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- Tier I & Tier II
- Tier III
- Tier IV

By Geography

- Russia
- Czech Republic
- Poland
- Austria
- Other Countries

Key Participants

IT Infrastructure Providers

- Atos
- Arista
- Broadcom
- Hewlett Packard Enterprise
- Cisco
- NetApp
- Dell Technologies
- IBM

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Lenovo

Huawei

Fujitsu

Supermicro

Construction Service Providers

Warbud

Arup

Astron Buildings

eld

ISG

Exyte & M+W

AODC SP. Z O.O.

Qumak S.A.

H1 Systems

Citrus Solutions

Support Infrastructure Providers

ABB

Caterpillar

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Cummins

Eaton

Legrand

STULZ

Schneider Electric

Vertiv

Euro-Diesel (KINOLT)

Rittal

Climaveneta

Riello UPS

Socomec

KOHLER(SDMO)

MTU Onsite Energy

Data Center Investors

Equinix

Boosteroid

3data

Host-telecom.com, s.r.o.

CEZ Group

Vapor IO

Conova Communications GmbH

Telecor

ITLDC

IXcellerate

DataPro

Rostelecom

Rosenergoatom

Selectel

MTS

Yandex

AzInTelecom

IT and eGovernment, Republic of Serbia

MCF Group Estonia

Vantage Data Centers

TARGET AUDIENCE:

Datacenter Real Estate Investment Trusts (REIT)

Datacenter Construction Contractors

Datacenter Infrastructure Providers

New Entrants

Consultants/Consultancies/Advisory Firms

Corporate and Governments Agencies

WHY PURCHASE THIS REPORT?

To gain competitive intelligence about the industry and players in the market

To focus on the niche market

To offer a presentation-ready format and easy-to-interpret data

To enable decision-makers to make informed and profitable choices

To provide the expert quantitative and qualitative analysis on the revenue and growth projections of the data center market

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Contents

10. CENTRAL AND EASTERN EUROPE DATA CENTER MARKET BY ELECTRICAL INFRASTRUCTURE

11. CENTRAL AND EASTERN EUROPE DATA CENTER MARKET BY MECHANICAL INFRASTRUCTURE

12. CENTRAL AND EASTERN EUROPE DATA CENTER MARKET BY COOLING SYSTEMS

13. CENTRAL AND EASTERN EUROPE DATA CENTER MARKET BY GENERAL CONSTRUCTION

Building Design – Market Size & Forecast 2019?2025
Physical Security – Market Size & Forecast 2019?2025
DCIM – Market Size & Forecast 2019?2025

14. CENTRAL AND EASTERN EUROPE DATA CENTER MARKET BY TIER STANDARDS

Market Overview
Tier I & II – Market Size & Forecast 2019?2025
Tier III – Market Size & Forecast 2019?2025
Tier IV – Market Size & Forecast 2019?2025

15. CENTRAL AND EASTERN EUROPE DATA CENTER MARKET BY GEOGRAPHY

Poland Austria
Market Overview
Investment – Market Size & Forecast 2019?2025
Area – Market Size & Forecast 2019?2025
Power Capacity – Market Size & Forecast 2019?2025
Austria
Market Overview
Investment – Market Size & Forecast 2019?2025
Area – Market Size & Forecast 2019?2025
Power Capacity – Market Size & Forecast 2019?2025
Russia Czech Republic
Market Overview
Investment – Market Size & Forecast 2019?2025
Area – Market Size & Forecast 2019?2025
Power Capacity – Market Size & Forecast 2019?2025
Czech Republic
Market Overview
Investment – Market Size & Forecast 2019?2025
Area – Market Size & Forecast 2019?2025
Power Capacity – Market Size & Forecast 2019?2025
Other Cities
Investment – Market Size & Forecast 2019?2025
Area – Market Size & Forecast 2019?2025
Power Capacity – Market Size & Forecast 2019?2025

16. KEY MARKET PARTICIPANTS

IT Infrastructure Providers
Datacenter Construction Contractors & Sub-Contractors
Support Infrastructure Providers
Data Center Investors

17. APPENDIX

Market Definitions
Report Assumptions
Market Derivation
Datacenter Site Selection Criteria
Quantitative Summary
Overall Market
Market by Infrastructure
Market by Tier Standards

18. OTHER REPORTS IN THE SERIES

19. PREMIUM REPORTS

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List Of Exhibits

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Exhibit 24 Market Size & Forecast in Other Cities by Power Capacity 2019?2025 (MW)

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