

Data Center Colocation Market - Global Outlook & Forecast 2021-2026

<https://marketpublishers.com/r/D2393343444EN.html>

Date: November 2021

Pages: 926

Price: US\$ 4,495.00 (Single User License)

ID: D2393343444EN

Abstracts

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

The data center colocation market by investment is expected to grow at a CAGR of 4.40% during the period 2020–2026.

The following factors are likely to contribute to the growth of the data center colocation market during the forecast period:

Rising Adoption of Renewable Energy by Colocation Providers

Adoption of 5G is Growing Demand for Edge Data Centers

Growing Adoption of Li-Ion Batteries & Fuel Cells

Rising Hyperscale Deployments by Colocation Providers

DATA CENTER COLOCATION INDUSTRY INSIGHTS

The colocation market is attractive, with data centers offering a higher return on investment (ROI) than other commercial and industrial properties. In 2021, the increase in digitalization is due to the pandemic, several initiatives taken by different countries, and the deployment of technology such as IoT, big data, 5G, and edge. The rising investment by cloud service providers across various geographies is accelerating the colocation industry globally.

KEY HIGHLIGHTS

COVID-19 has been a catalyst to digitalization initiatives and a solid boost to colocation market growth.

An increase in digitalization across businesses will continue to grow the data center investment from colocation services.

The rack power density is expected to grow from an average of 4?6 kW in 2020 to about 10?12 kW in 2026 due to the increased high-performance infrastructure deployment.

DATA CENTER COLOCATION MARKET SEGMENTATION

This research report includes a detailed segmentation by:

Colocation Services

Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

General Construction

Tier Standards

Geography

MARKET SHARES & SEGMENTS

Colocation services in data centers are offered through retail and wholesale colocation. In terms of market share, the retail segment continues to dominate the market with around 70% of the market share.

Retail colocation services are likely to grow as several enterprises in developing countries are shifting from traditional server room infrastructure to data centers.

Market Segmentation by Colocation Services

Retail Colocation

Wholesale Colocation

Market Segmentation by Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

General Construction

Market Segmentation by Electrical Infrastructure

UPS Systems

Generators

Transfer Switches & Switchgear

PDU's

Other Electrical Infrastructure

Market Segmentation by Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chiller Units

Cooling Towers

Condensers & Dry Coolers

Economizers & Evaporative Coolers

Other Cooling Units

Racks

Other Mechanical Infrastructure

Cooling Techniques

Air-Based Cooling Technique

Liquid-Based Cooling Technique

Market Segmentation by General Construction

Core & Shell Development

Installation & Commissioning Services

Engineering & Building Design

Physical Security

DCIM/BMS Solutions

Market Segmentation by Tier Standards

Tier I & II

Tier III

Tier IV

GEOGRAPHY ANALYSIS

North America is among the top locations in terms of colocation facility market growth. In Canada, cloud providers are seeing volatile growth over the past 2-3 years, resulting in significant growth for wholesale data center providers. In the US, Virginia, Texas, and California are the major markets for colocation operations, followed by Illinois, Georgia, Nevada, and Oregon. Canada is an upcoming market owing to its accessibility to renewable energy sources and low power costs.

Market Segmentation by Geography

North America

US

Canada

Latin America

Brazil

Other Latin American Countries

Western Europe

UK

Germany

Netherlands

France

Ireland

Switzerland

Italy

Spain

Other Western European Countries

Nordics

Denmark

Sweden

Norway

Finland & Iceland

Central & Eastern Europe

Russia & Czech Republic

Poland & Austria

Other Central & Eastern European Countries

Middle East

UAE

Saudi Arabia

Turkey

Other Middle Eastern Countries

Africa

South Africa

Kenya

Other African Countries

APAC

China & Hong Kong

Australia & New Zealand

India

Japan

Rest of APAC

Southeast Asia

Singapore

Indonesia

Malaysia

Thailand

Other Southeast Asian Countries

COMPETITIVE LANDSCAPE

Prominent Data Center Colocation Providers

21Vianet Group

China Telecom

Colt Data Centre Services (COLT DCS)

Compass Datacenters

CoreSite Realty

CyrusOne

Digital Realty

Equinix

GDS Services

Global Switch

NTT Global Data Centers

QTS Realty Trust

ST Telemedia Global Data Centres (STT GDC)

Vantage Data Centers

Other Prominent Data Center Colocation Providers

3data

365 Data Centers (STONECOURT CAPITAL)

AirTrunk Operating

Aligned

American Tower

AQ Compute

Archer Datacenters

Aruba

AT TOKYO

Bahnhof

BDx (Big Data Exchange)

Bulk Infrastructure

Bridge Data Centres

Canberra Data Centres

Chayora

China Mobile International

China Unicom

Chindata

Chunghwa Telecom

Cologix

COPT Data Center Solutions

CtrlS Datacenters

Cyxtera Technologies

DATA4

DataBank

DigiPlex

EcoDataCenter

EdgeConneX

EdgeCore Internet Real Estate

Fibre Centre

fifteenfortyseven Critical Systems Realty

Flexential

GIGA Data Centers

GlobalConnect

Green Mountain

H5 Data Centers

HostDime

Internet Initiative Japan (IIJ)

Iron Mountain

KDDI

Keppel Data Centres

maincubes one

Millicom (TIGO)

NEXTDC

ODATA

Orange

PCCW Solutions

PLDT Enterprise

Pi Data Centers

Prime Data Centers

Princeton Digital Group (PDG)

Purecolo

Raxio Group

Regal Orion

Rostelecom

Sabey Data Center

Scala Data Centers

Shanghai Atrium (AtHub)

Sify Technologies

Singtel

Space DC

STACK INFRASTRUCTURE

Stream Data Centers

SUNeVision (iAdvantage)

Switch

T5 Data Centers

Telecom Italia Sparkle

Tenglong Holdings Group (Tamron)

Teraco Data Environments

TierPoint

Turkcell

Urbacon Data Centre Solutions

US Signal

Wingu

WORLDSTREAM

Yandex Cloud

Yotta Infrastructure Solutions (HIRANANDANI GROUP)

Zayo Group

New Entrants

ADANICONNEX (Adani Enterprises)

Cirrus Data Services

CloudHQ

Digital Edge

Echelon Data Centres

EdgeMicro

EdgeX Data Centers

Element Critical

Global Technical Realty

IXAfrica

Mantra Data Centers

Nowva

PointOne

Quantum Loophole

Stratus DC Management

KEY QUESTIONS ANSWERED:

1. How big is the data center colocation market?
2. Which region held the largest share in the data center colocation market?
3. Which segment accounted for the highest share in the data center colocation industry?
4. What are the factors driving the data center colocation market?
5. Who are the key players in the data center colocation industry?
6. What are the latest trends in the Data Center Colocation Market?

Contents

1 RESEARCH METHODOLOGY

2 RESEARCH OBJECTIVES

3 RESEARCH PROCESS

4 SCOPE & COVERAGE

4.1 Market Definition

4.2 Base Year

4.3 Scope Of The Study

4.4 Market Segments

4.04.01 Market Segmentation By Infrastructure

4.04.02 Market Segmentation By Electrical Infrastructure

4.04.03 Market Segmentation By Mechanical Infrastructure

4.04.04 Market Segmentation By Cooling Systems

4.04.05 Market Segmentation By General Construction

4.04.06 Market Segmentation By Tier Standards

4.04.07 Market Segmentation By Service Type

4.04.08 Market Segmentation By Geography

5 REPORT ASSUMPTIONS & CAVEATS

5.1 Key Caveats

5.2 Currency Conversion

5.3 Market Derivation

6 MARKET AT A GLANCE

7 INTRODUCTION

7.1 Internet & Data Growth

7.2 Data Center Site Selection Criteria

7.02.01 Key

7.3 Electricity Pricing Across Major Data Center Locations

8 MARKET OPPORTUNITIES & TRENDS

- 8.1 Rising Adoption Of Renewable Energy By Colocation Providers
- 8.2 M&As & Partnerships To Improve Colocation Share
- 8.3 Growing Rack Power Density
- 8.4 5g Adoption Driving Demand For Edge Data Centers
- 8.5 Increased Demand For Cloud Services
- 8.6 Increase In Submarine Cable Deployment
- 8.7 Increased Adoption Of OCP & Hyperscale-Specific Infrastructure
- 8.8 Growing Adoption Of Li-Ion Batteries & Fuel Cells

9 MARKET GROWTH ENABLERS

- 9.1 Impact Of Covid-19 On Colocation Data Centers
- 9.2 Rising Hyperscale Deployments By Colocation Providers
- 9.3 Tax Incentives Save Colocation OpEx & Customer Costs
- 9.4 Construction Of Green Data Center Facilities
- 9.5 Data Regulations To Increase Investments

10 MARKET RESTRAINTS

- 10.1 Location Constraints For Data Center Construction
- 10.2 Rising Carbon Emissions From Data Centers
- 10.3 Dearth Of Skilled Workforce
- 10.4 Opex Driven By High Maintenance Cost & Inefficiency

11 MARKET LANDSCAPE

- 11.1 Market Overview
- 11.2 Investment: Market Size & Forecast
- 11.3 Area: Market Size & Forecast
- 11.4 Power Capacity: Market Size & Forecast
- 11.5 Colocation Revenue: Market Size & Forecast
- 11.6 Five Forces Analysis
 - 11.06.01 Threat Of New Entrants
 - 11.06.02 Bargaining Power Of Suppliers
 - 11.06.03 Bargaining Power Of Buyers
 - 11.06.04 Threat Of Substitutes
 - 11.06.05 Competitive Rivalry

12 COLOCATION SERVICES

- 12.1 Market Snapshot & Growth Engine
- 12.2 Market Overview
- 12.3 Retail Colocation
 - 12.03.01 Market Overview
 - 12.03.02 Revenue: Market Size & Forecast
- 12.4 Wholesale Colocation
 - 12.04.01 Market Overview
 - 12.04.02 Revenue: Market Size & Forecast

13 INFRASTRUCTURE

- 13.1 Market Snapshot & Growth Engine
- 13.2 Market Overview
- 13.3 Electrical Infrastructure
 - 13.03.01 Market Overview
 - 13.03.02 Investment: Market Size & Forecast
- 13.4 Mechanical Infrastructure
 - 13.04.01 Market Overview
 - 13.04.02 Investment: Market Size & Forecast
- 13.5 General Construction
 - 13.05.01 Market Overview
 - 13.05.02 Investment: Market Size & Forecast

14 ELECTRICAL INFRASTRUCTURE

- 14.1 Market Snapshot & Growth Engine
- 14.2 UPS Systems
 - 14.02.01 Market Overview
 - 14.02.02 Investment: Market Size & Forecast
- 14.3 Generators
 - 14.03.01 Market Overview
 - 14.03.02 Investment: Market Size & Forecast
- 14.4 Transfer Switches & Switchgear
 - 14.04.01 Market Overview
 - 14.04.02 Investment: Market Size & Forecast
- 14.5 Power Distribution Units
 - 14.05.01 Market Overview

- 14.05.02 Investment: Market Size & Forecast
- 14.6 Other Electrical Infrastructure
 - 14.06.01 Market Overview
 - 14.06.02 Investment: Market Size & Forecast

15 MECHANICAL INFRASTRUCTURE

- 15.1 Market Snapshot & Growth Engine
- 15.2 Cooling Systems
 - 15.02.01 Market Overview
 - 15.02.02 Investment: Market Size & Forecast
- 15.3 Racks
 - 15.03.01 Market Overview
 - 15.03.02 Investment: Market Size & Forecast
- 15.4 Other Mechanical Infrastructure
 - 15.04.01 Market Overview
 - 15.04.02 Investment: Market Size & Forecast

16 COOLING SYSTEMS

- 16.1 Market Snapshot & Growth Engine
- 16.2 CRAC & CRAH Units
 - 16.02.01 Market Overview
 - 16.02.02 Investment: Market Size & Forecast
- 16.3 Chiller Units
 - 16.03.01 Market Overview
 - 16.03.02 Investment: Market Size & Forecast
- 16.4 Cooling Towers, Condensers & Dry Coolers
 - 16.04.01 Market Overview
 - 16.04.02 Investment: Market Size & Forecast
- 16.5 Economizers & Evaporative Coolers
 - 16.05.01 Market Overview
 - 16.05.02 Investment: Market Size & Forecast
- 16.6 Other Cooling Units
 - 16.06.01 Market Overview
 - 16.06.02 Investment: Market Size & Forecast

17 GENERAL CONSTRUCTION

- 17.1 Market Snapshot & Growth Engine
- 17.2 Core & Shell Development
 - 17.02.01 Market Overview
 - 17.02.02 Investment: Market Size & Forecast
- 17.3 Installation & Commissioning Services
 - 17.03.01 Market Overview
 - 17.03.02 Investment: Market Size & Forecast
- 17.4 Building & Engineering Design
 - 17.04.01 Market Overview
 - 17.04.02 Investment: Market Size & Forecast
- 17.5 Physical Security
 - 17.05.01 Market Overview
 - 17.05.02 Investment: Market Size & Forecast
- 17.6 DCIM/BMS Solutions
 - 17.06.01 Market Overview
 - 17.06.02 Investment: Market Size & Forecast

18 TIER STANDARDS

- 18.1 Market Snapshot & Growth Engine
- 18.2 TIER I & TIER II
 - 18.02.01 Market Overview
 - 18.02.02 Investment: Market Size & Forecast
- 18.3 TIER III
 - 18.03.01 Market Overview
 - 18.03.02 Investment: Market Size & Forecast
- 18.4 TIER IV
 - 18.04.01 Market Overview
 - 18.04.02 Investment: Market Size & Forecast

19 GEOGRAPHY

- 19.1 Investment: Market Snapshot & Growth Engine
- 19.2 Area: Market Snapshot & Growth Engine
- 19.3 Power Capacity: Market Snapshot & Growth Engine
- 19.4 Revenue: Market Snapshot & Growth Engine
- 19.5 Support Infrastructure: Market Snapshot & Growth Engine

20 NORTH AMERICA

- 20.1 Investment: Market Snapshot & Growth Engine
- 20.2 Area: Market Snapshot & Growth Engine
- 20.3 Power Capacity: Market Snapshot & Growth Engine
- 20.4 Support Infrastructure: Market Snapshot & Growth Engine
- 20.5 Colocation Revenue: Market Snapshot & Growth Engine
- 20.6 Market Overview
- 20.7 Investment: Market Size & Forecast
 - 20.07.01 Market Size & Forecast
- 20.8 Area: Market Size & Forecast
 - 20.08.01 Market Size & Forecast
- 20.9 Power Capacity: Market Size & Forecast
 - 20.09.01 Market Size & Forecast
- 20.10 Support Infrastructure: Market Size & Forecast
 - 20.10.01 Market Size & Forecast
- 20.11 Revenue: Market Size & Forecast
 - 20.11.01 Market Size & Forecast
- 20.12 US
 - 20.12.01 Market Snapshot & Growth Engine
 - 20.12.02 Market Overview
 - 20.12.03 Investment: Market Size & Forecast
 - 20.12.04 Area: Market Size & Forecast
 - 20.12.05 Power Capacity: Market Size & Forecast
 - 20.12.06 Support Infrastructure: Market Size & Forecast
 - 20.12.07 Colocation Revenue: Market Size & Forecast
- 20.13 CANADA
 - 20.13.01 Market Snapshot & Growth Engine
 - 20.13.02 Market Overview
 - 20.13.03 Investment: Market Size & Forecast
 - 20.13.04 Area: Market Size & Forecast
 - 20.13.05 Power Capacity: Market Size & Forecast
 - 20.13.06 Support Infrastructure: Market Size & Forecast
 - 20.13.07 Colocation Revenue: Market Size & Forecast

21 LATIN AMERICA

- 21.1 Investment: Market Snapshot & Growth Engine
- 21.2 Area: Market Snapshot & Growth Engine
- 21.3 Power Capacity: Market Snapshot & Growth Engine

21.4 Support Infrastructure: Market Snapshot & Growth Engine

21.5 Colocation Revenue: Market Snapshot & Growth Engine

21.6 Market Overview

21.7 Investment: Market Size & Forecast

21.07.01 Market Size & Forecast

21.8 Area: Market Size & Forecast

21.08.01 Market Size & Forecast

21.9 Power Capacity: Market Size & Forecast

21.09.01 Market Size & Forecast

21.10 Support Infrastructure: Market Size & Forecast

21.10.01 Market Size & Forecast

21.11 Colocation Revenue: Market Size & Forecast

21.11.01 Market Size & Forecast

21.12 Brazil

21.12.01 Market Snapshot & Growth Engine

21.12.02 Market Overview

21.12.03 Investment: Market Size & Forecast

21.12.04 Area: Market Size & Forecast

21.12.05 Power Capacity: Market Size & Forecast

21.12.06 Support Infrastructure: Market Size & Forecast

21.12.07 Colocation Revenue: Market Size & Forecast

21.13 Other Latin American Countries

21.13.01 Market Snapshot & Growth Engine

21.13.02 Market Overview

21.13.03 Investment: Market Size & Forecast

21.13.04 Area: Market Size & Forecast

21.13.05 Power Capacity: Market Size & Forecast

21.13.06 Support Infrastructure: Market Size & Forecast

21.13.07 Colocation Revenue: Market Size & Forecast

22 WESTERN EUROPE

22.1 Investment: Market Snapshot & Growth Engine

22.2 Area: Market Snapshot & Growth Engine

22.3 Power Capacity: Market Snapshot & Growth Engine

22.4 Infrastructure Investment: Market Snapshot & Growth Engine

22.5 Colocation Revenue: Market Snapshot & Growth Engine

22.6 Market Overview

22.7 Investment

- 22.07.01 Market Size & Forecast
- 22.8 Area
 - 22.08.01 Market Size & Forecast
- 22.9 Power Capacity
 - 22.09.01 Market Size & Forecast
- 22.10 Support Infrastructure
 - 22.10.01 Market Size & Forecast
- 22.11 Colocation Revenue
 - 22.11.01 Market Size & Forecast
- 22.12 UK
 - 22.12.01 Market Snapshot & Growth Engine
 - 22.12.02 Market Overview
 - 22.12.03 Investment: Market Size & Forecast
 - 22.12.04 Area: Market Size & Forecast
 - 22.12.05 Power Capacity: Market Size & Forecast
 - 22.12.06 Support Infrastructure: Market Size & Forecast
 - 22.12.07 Colocation Revenue: Market Size & Forecast
- 22.13 Germany
 - 22.13.01 Market Snapshot & Growth Engine
 - 22.13.02 Market Overview
 - 22.13.03 Investment: Market Size & Forecast
 - 22.13.04 Area: Market Size & Forecast
 - 22.13.05 Power Capacity: Market Size & Forecast
 - 22.13.06 Support Infrastructure: Market Size & Forecast
 - 22.13.07 Colocation Revenue: Market Size & Forecast
- 22.14 France
 - 22.14.01 Market Snapshot & Growth Engine
 - 22.14.02 Market Overview
 - 22.14.03 Investment: Market Size & Forecast
 - 22.14.04 Area: Market Size & Forecast
 - 22.14.05 Power Capacity: Market Size & Forecast
 - 22.14.06 Support Infrastructure: Market Size & Forecast
 - 22.14.07 Colocation Revenue: Market Size & Forecast
- 22.15 Netherlands
 - 22.15.01 Market Snapshot & Growth Engine
 - 22.15.02 Market Overview
 - 22.15.03 Investment: Market Size & Forecast
 - 22.15.04 Area: Market Size & Forecast
 - 22.15.05 Power Capacity: Market Size & Forecast

- 22.15.06 Support Infrastructure: Market Size & Forecast
- 22.15.07 Colocation Revenue: Market Size & Forecast
- 22.16 Ireland
 - 22.16.01 Market Snapshot & Growth Engine
 - 22.16.02 Market Overview
 - 22.16.03 Investment: Market Size & Forecast
 - 22.16.04 Area: Market Size & Forecast
 - 22.16.05 Power Capacity: Market Size & Forecast
 - 22.16.06 Support Infrastructure: Market Size & Forecast
 - 22.16.07 Colocation Revenue: Market Size & Forecast
- 22.17 Italy
 - 22.17.01 Market Snapshot & Growth Engine
 - 22.17.02 Market Overview
 - 22.17.03 Investment: Market Size & Forecast
 - 22.17.04 Area: Market Size & Forecast
 - 22.17.05 Power Capacity: Market Size & Forecast
 - 22.17.06 Support Infrastructure: Market Size & Forecast
 - 22.17.07 Colocation Revenue: Market Size & Forecast
- 22.18 Switzerland
 - 22.18.01 Market Snapshot & Growth Engine
 - 22.18.02 Market Overview
 - 22.18.03 Investment: Market Size & Forecast
 - 22.18.04 Area: Market Size & Forecast
 - 22.18.05 Power Capacity: Market Size & Forecast
 - 22.18.06 Support Infrastructure: Market Size & Forecast
 - 22.18.07 Colocation Revenue: Market Size & Forecast
- 22.19 Spain
 - 22.19.01 Market Snapshot & Growth Engine
 - 22.19.02 Market Overview
 - 22.19.03 Investment: Market Size & Forecast
 - 22.19.04 Area: Market Size & Forecast
 - 22.19.05 Power Capacity: Market Size & Forecast
 - 22.19.06 Support Infrastructure: Market Size & Forecast
 - 22.19.07 Colocation Revenue: Market Size & Forecast
- 22.20 Other Western European Countries
 - 22.20.01 Market Snapshot & Growth Engine
 - 22.20.02 Market Overview
 - 22.20.03 Investment: Market Size & Forecast
 - 22.20.04 Area: Market Size & Forecast

- 22.20.05 Power Capacity: Market Size & Forecast
- 22.20.06 Support Infrastructure: Market Size & Forecast
- 22.20.07 Colocation Revenue: Market Size & Forecast

23 NORDICS

- 23.1 Investment: Market Snapshot & Growth Engine
- 23.2 Colocation Revenue: Market Snapshot & Growth Engine
- 23.3 Area: Market Snapshot & Growth Engine
- 23.4 Power Capacity: Market Snapshot & Growth Engine
- 23.5 Infrastructure Investment: Market Snapshot & Growth Engine
- 23.6 Market Overview
- 23.7 Investment
 - 23.07.01 Market Size & Forecast
- 23.8 Area
 - 23.08.01 Market Size & Forecast
- 23.9 Power Capacity
 - 23.09.01 Market Size & Forecast
- 23.10 Support Infrastructure
 - 23.10.01 Market Size & Forecast
- 23.11 Colocation Revenue
 - 23.11.01 Market Size & Forecast
- 23.12 Denmark
 - 23.12.01 Market Snapshot & Growth Engine
 - 23.12.02 Market Overview
 - 23.12.03 Investment: Market Size & Forecast
 - 23.12.04 Area: Market Size & Forecast
 - 23.12.05 Power Capacity: Market Size & Forecast
 - 23.12.06 Support Infrastructure: Market Size & Forecast
 - 23.12.07 Colocation Revenue: Market Size & Forecast
- 23.13 Sweden
 - 23.13.01 Market Snapshot & Growth Engine
 - 23.13.02 Market Overview
 - 23.13.03 Investment: Market Size & Forecast
 - 23.13.04 Area: Market Size & Forecast
 - 23.13.05 Power Capacity: Market Size & Forecast
 - 23.13.06 Support Infrastructure: Market Size & Forecast
 - 23.13.07 Colocation Revenue: Market Size & Forecast
- 23.14 Norway

- 23.14.01 Market Snapshot & Growth Engine
- 23.14.02 Market Overview
- 23.14.03 Investment: Market Size & Forecast
- 23.14.04 Area: Market Size & Forecast
- 23.14.05 Power Capacity: Market Size & Forecast
- 23.14.06 Support Infrastructure: Market Size & Forecast
- 23.14.07 Colocation Revenue: Market Size & Forecast
- 23.15 Finland & Iceland
 - 23.15.01 Market Snapshot & Growth Engine
 - 23.15.02 Market Overview
 - 23.15.03 Investment: Market Size & Forecast
 - 23.15.04 Area: Market Size & Forecast
 - 23.15.05 Power Capacity: Market Size & Forecast
 - 23.15.06 Support Infrastructure: Market Size & Forecast
 - 23.15.07 Colocation Revenue: Market Size & Forecast

24 CENTRAL & EASTERN EUROPE

- 24.1 Investment: Market Snapshot & Growth Engine
- 24.2 Area: Market Snapshot & Growth Engine
- 24.3 Power Capacity: Market Snapshot & Growth Engine
- 24.4 Infrastructure Investment: Market Snapshot & Growth Engine
- 24.5 Colocation Revenue: Market Snapshot & Growth Engine
- 24.6 Market Overview
- 24.7 Investment
 - 24.07.01 Market Size & Forecast
- 24.8 Area
 - 24.08.01 Market Size & Forecast
- 24.9 Power Capacity
 - 24.09.01 Market Size & Forecast
- 24.10 Support Infrastructure
 - 24.10.01 Market Size & Forecast
- 24.11 Colocation Revenue
 - 24.11.01 Market Size & Forecast
- 24.12 Russia & Czech Republic
 - 24.12.01 Market Snapshot & Growth Engine
 - 24.12.02 Market Overview
 - 24.12.03 Investment: Market Size & Forecast
 - 24.12.04 Area: Market Size & Forecast

- 24.12.05 Power Capacity: Market Size & Forecast
- 24.12.06 Support Infrastructure: Market Size & Forecast
- 24.12.07 Colocation Revenue: Market Size & Forecast
- 24.13 Poland & Austria
 - 24.13.01 Market Snapshot & Growth Engine
 - 24.13.02 Market Overview
 - 24.13.03 Investment: Market Size & Forecast
 - 24.13.04 Area: Market Size & Forecast
 - 24.13.05 Power Capacity: Market Size & Forecast
 - 24.13.06 Support Infrastructure: Market Size & Forecast
 - 24.13.07 Colocation Revenue: Market Size & Forecast
- 24.14 Other Central & Eastern European Countries
 - 24.14.01 Market Snapshot & Growth Engine
 - 24.14.02 Market Overview
 - 24.14.03 Investment: Market Size & Forecast
 - 24.14.04 Area: Market Size & Forecast
 - 24.14.05 Power Capacity: Market Size & Forecast
 - 24.14.06 Support Infrastructure: Market Size & Forecast
 - 24.14.07 Colocation Revenue: Market Size & Forecast

25 MIDDLE EAST

- 25.1 Investment: Market Snapshot & Growth Engine
- 25.2 Area: Market Snapshot & Growth Engine
- 25.3 Power Capacity: Market Snapshot & Growth Engine
- 25.4 Infrastructure Investment: Market Snapshot & Growth Engine
- 25.5 Colocation Revenue: Market Snapshot & Growth Engine
- 25.6 Market Overview
- 25.7 Investment
 - 25.07.01 Market Size & Forecast
- 25.8 Area
 - 25.08.01 Market Size & Forecast
- 25.9 Power Capacity
 - 25.09.01 Market Size & Forecast
- 25.10 Support Infrastructure
 - 25.10.01 Market Size & Forecast
- 25.11 Colocation Revenue
 - 25.11.01 Market Size & Forecast
- 25.12 United Arab Emirates

- 25.12.01 Market Overview
- 25.12.02 Investment: Market Size & Forecast
- 25.12.03 Area: Market Size & Forecast
- 25.12.04 Power Capacity: Market Size & Forecast
- 25.12.05 Support Infrastructure: Market Size & Forecast
- 25.12.06 Colocation Revenue: Market Size & Forecast
- 25.13 Saudi Arabia
 - 25.13.01 Market Overview
 - 25.13.02 Investment: Market Size & Forecast
 - 25.13.03 Area: Market Size & Forecast
 - 25.13.04 Power Capacity: Market Size & Forecast
 - 25.13.05 Support Infrastructure: Market Size & Forecast
 - 25.13.06 Colocation Revenue: Market Size & Forecast
- 25.14 Turkey
 - 25.14.01 Market Overview
 - 25.14.02 Investment: Market Size & Forecast
 - 25.14.03 Area: Market Size & Forecast
 - 25.14.04 Power Capacity: Market Size & Forecast
 - 25.14.05 Support Infrastructure: Market Size & Forecast
 - 25.14.06 Colocation Revenue: Market Size & Forecast
- 25.15 Other Middle Eastern Countries
 - 25.15.01 Market Overview
 - 25.15.02 Investment: Market Size & Forecast
 - 25.15.03 Area: Market Size & Forecast
 - 25.15.04 Power Capacity: Market Size & Forecast
 - 25.15.05 Support Infrastructure: Market Size & Forecast
 - 25.15.06 Colocation Revenue: Market Size & Forecast

26 AFRICA

- 26.1 Investment: Market Snapshot & Growth Engine
- 26.2 Colocation Revenue: Market Snapshot & Growth Engine
- 26.3 Area: Market Snapshot & Growth Engine
- 26.4 Power Capacity: Market Snapshot & Growth Engine
- 26.5 Support Infrastructure: Market Snapshot & Growth Engine
- 26.6 Market Overview
- 26.7 Investment
 - 26.07.01 Market Size & Forecast
- 26.8 Area

- 26.08.01 Market Size & Forecast
- 26.9 Power Capacity
 - 26.09.01 Market Size & Forecast
- 26.10 Support Infrastructure
 - 26.10.01 Market Size & Forecast
- 26.11 Colocation Revenue
 - 26.11.01 Market Size & Forecast
- 26.12 South Africa
 - 26.12.01 Market Overview
 - 26.12.02 Investment: Market Size & Forecast
 - 26.12.03 Area: Market Size & Forecast
 - 26.12.04 Power Capacity: Market Size & Forecast
 - 26.12.05 Support Infrastructure: Market Size & Forecast
 - 26.12.06 Colocation Revenue: Market Size & Forecast
- 26.13 Kenya
 - 26.13.01 Market Overview
 - 26.13.02 Investment: Market Size & Forecast
 - 26.13.03 Area: Market Size & Forecast
 - 26.13.04 Power Capacity: Market Size & Forecast
 - 26.13.05 Support Infrastructure: Market Size & Forecast
 - 26.13.06 Colocation Revenue: Market Size & Forecast
- 26.14 Other African Countries
 - 26.14.01 Market Overview
 - 26.14.02 Investment: Market Size & Forecast
 - 26.14.03 Area: Market Size & Forecast
 - 26.14.04 Power Capacity: Market Size & Forecast
 - 26.14.05 Support Infrastructure: Market Size & Forecast
 - 26.14.06 Colocation Revenue: Market Size & Forecast

27 APAC

- 27.1 Investment: Market Snapshot & Growth Engine
- 27.2 Area: Market Snapshot & Growth Engine
- 27.3 Power Capacity: Market Snapshot & Growth Engine
- 27.4 Support Infrastructure: Market Snapshot & Growth Engine
- 27.5 Revenue: Market Snapshot & Growth Engine
- 27.6 Market Overview
- 27.7 Investment: Market Size & Forecast
 - 27.07.01 Market Size & Forecast

27.8 Area

27.08.01 Market Size & Forecast

27.9 Power Capacity

27.09.01 Market Size & Forecast

27.10 Support Infrastructure

27.10.01 Market Size & Forecast

27.11 Colocation Revenue

27.11.01 Market Size & Forecast

27.12 China & Hong Kong

27.12.01 Market Snapshot & Growth Engine

27.12.02 Market Overview

27.12.03 Investment: Market Size & Forecast

27.12.04 Area: Market Size & Forecast

27.12.05 Power Capacity: Market Size & Forecast

27.12.06 Support Infrastructure: Market Size & Forecast

27.12.07 Colocation Revenue: Market Size & Forecast

27.13 Australia & New Zealand

27.13.01 Market Snapshot & Growth Engine

27.13.02 Market Overview

27.13.03 Investment: Market Size & Forecast

27.13.04 Area: Market Size & Forecast

27.13.05 Power Capacity: Market Size & Forecast

27.13.06 Support Infrastructure: Market Size & Forecast

27.13.07 Colocation Revenue: Market Size & Forecast

27.14 India

27.14.01 Market Snapshot & Growth Engine

27.14.02 Market Overview

27.14.03 Investment: Market Size & Forecast

27.14.04 Area: Market Size & Forecast

27.14.05 Power Capacity: Market Size & Forecast

27.14.06 Support Infrastructure: Market Size & Forecast

27.14.07 Colocation Revenue: Market Size & Forecast

27.15 Japan

27.15.01 Market Snapshot & Growth Engine

27.15.02 Market Overview

27.15.03 Investment: Market Size & Forecast

27.15.04 Area: Market Size & Forecast

27.15.05 Power Capacity: Market Size & Forecast

27.15.06 Support Infrastructure: Market Size & Forecast

- 27.15.07 Colocation Revenue: Market Size & Forecast
- 27.16 Rest Of Apac
 - 27.16.01 Market Snapshot & Growth Engine
 - 27.16.02 Market Overview
 - 27.16.03 Investment: Market Size & Forecast
 - 27.16.04 Area: Market Size & Forecast
 - 27.16.05 Power Capacity: Market Size & Forecast
 - 27.16.06 Support Infrastructure: Market Size & Forecast
 - 27.16.07 Colocation Revenue: Market Size & Forecast

28 SOUTHEAST ASIA

- 28.1 Investment: Market Snapshot & Growth Engine
- 28.2 Area: Market Snapshot & Growth Engine
- 28.3 Power Capacity: Market Snapshot & Growth Engine
- 28.4 Support Infrastructure: Market Snapshot & Growth Engine
- 28.5 Revenue: Market Snapshot & Growth Engine
- 28.6 Market Overview
- 28.7 Investment: Market Size & Forecast
 - 28.07.01 Market Size & Forecast
- 28.8 Area: Market Size & Forecast
 - 28.08.01 Market Size & Forecast
- 28.9 Power Capacity: Market Size & Forecast
 - 28.09.01 Market Size & Forecast
- 28.10 Support Infrastructure: Market Size & Forecast
 - 28.10.01 Market Size & Forecast
- 28.11 Colocation Revenue: Market Size & Forecast
 - 28.11.01 Market Size & Forecast
- 28.12 Singapore
 - 28.12.01 Market Snapshot & Growth Engine
 - 28.12.02 Market Overview
 - 28.12.03 Investment: Market Size & Forecast
 - 28.12.04 Area: Market Size & Forecast
 - 28.12.05 Power Capacity: Market Size & Forecast
 - 28.12.06 Support Infrastructure: Market Size & Forecast
 - 28.12.07 Colocation Revenue: Market Size & Forecast
- 28.13 Indonesia
 - 28.13.01 Market Snapshot & Growth Engine
 - 28.13.02 Market Overview

- 28.13.03 Investment: Market Size & Forecast
- 28.13.04 Area: Market Size & Forecast
- 28.13.05 Power Capacity: Market Size & Forecast
- 28.13.06 Support Infrastructure: Market Size & Forecast
- 28.13.07 Colocation Revenue Market Size & Forecast

28.14 Malaysia

- 28.14.01 Market Snapshot & Growth Engine
- 28.14.02 Market Overview
- 28.14.03 Investment: Market Size & Forecast
- 28.14.04 Area: Market Size & Forecast
- 28.14.05 Power Capacity: Market Size & Forecast
- 28.14.06 Support Infrastructure: Market Size & Forecast
- 28.14.07 Colocation Revenue Market Size & Forecast

28.15 Thailand

- 28.15.01 Market Snapshot & Growth Engine
- 28.15.02 Market Overview
- 28.15.03 Investment: Market Size & Forecast
- 28.15.04 Area: Market Size & Forecast
- 28.15.05 Power Capacity: Market Size & Forecast
- 28.15.06 Support Infrastructure: Market Size & Forecast
- 28.15.07 Colocation Revenue: Market Size & Forecast

28.16 Other Southeast Asian Countries

- 28.16.01 Market Snapshot & Growth Engine
- 28.16.02 Market Overview
- 28.16.03 Investment: Market Size & Forecast
- 28.16.04 Area: Market Size & Forecast
- 28.16.05 Power Capacity: Market Size & Forecast
- 28.16.06 Support Infrastructure: Market Size & Forecast
- 28.16.07 Colocation Revenue: Market Size & Forecast

29 COMPETITIVE LANDSCAPE

- 29.1 Market Share By Colocation Investment
- 29.2 Market Share By Colocation Area
- 29.3 Market Share By Colocation Power Capacity
- 29.4 Market Share By Colocation Revenue

30 PROMINENT DATA CENTER COLOCATION PROVIDERS

30.1 21VIANET GROUP

- 30.01.01 Business Overview
- 30.01.02 Service Offerings
- 30.01.03 Key News

30.2 CHINA TELECOM

- 30.02.01 Business Overview
- 30.02.02 Service Offerings

30.3 COLT DATA CENTRE SERVICES (COLT DCS)

- 30.03.01 Business Overview
- 30.03.02 Service Offerings

30.4 COMPASS DATACENTERS

- 30.04.01 Business Overview
- 30.04.02 Service Offerings

30.5 CORESITE REALTY

- 30.05.01 Business Overview
- 30.05.02 Service Offerings
- 30.05.03 Key News

30.6 CYRUSONE

- 30.06.01 Business Overview
- 30.06.02 Service Offerings

30.7 DIGITAL REALTY

- 30.07.01 Business Overview
- 30.07.02 Service Offerings
- 30.07.03 Key News

30.8 EQUINIX

- 30.08.01 Business Overview
- 30.08.02 Service Offerings
- 30.08.03 Key News

30.9 GDS SERVICES

- 30.09.01 Business Overview
- 30.09.02 Service Offerings
- 30.09.03 Key News

30.10 GLOBAL SWITCH

- 30.10.01 Business Overview
- 30.10.02 Service Offerings
- 30.10.03 Key News

30.11 NTT GLOBAL DATA CENTERS

- 30.11.01 Business Overview
- 30.11.02 Service Offerings

30.12 QTS REALTY TRUST

30.12.01 Business Overview

30.12.02 Service Offerings

30.13 ST TELEMEDIA GLOBAL DATA CENTRES

30.13.01 Business Overview

30.13.02 Service Offerings

30.14 VANTAGE DATA CENTERS

30.14.01 Business Overview

30.14.02 Service Offerings

30.14.03 Key News

31 OTHER PROMINENT DATA CENTER COLOCATION PROVIDERS**31.1 3DATA**

31.01.01 Business Overview

31.01.02 Service Offerings

31.2 365 DATA CENTERS (STONECOURT CAPITAL)

31.02.01 Business Overview

31.02.02 Service Offerings

31.3 AIRTRUNK OPERATING

31.03.01 Business Overview

31.03.02 Service Offerings

31.03.03 Key News

31.4 ALIGNED

31.04.01 Business Overview

31.04.02 Service Offerings

31.5 AMERICAN TOWER

31.05.01 Business Overview

31.05.02 Service Offerings

31.6 AQ COMPUTE

31.06.01 Business Overview

31.06.02 Service Offerings

31.7 ARCHER DATACENTERS

31.07.01 Business Overview

31.07.02 Service Offerings

31.8 ARUBA

31.08.01 Business Overview

31.08.02 Service Offerings

31.9 AT TOKYO

- 31.09.01 Business Overview
- 31.09.02 Service Offerings
- 31.09.03 Key News
- 31.10 BAHNHOF
 - 31.10.01 Business Overview
 - 31.10.02 Service Offerings
- 31.11 BDX (BIG DATA EXCHANGE)
 - 31.11.01 Business Overview
 - 31.11.02 Service Offerings
- 31.12 BULK INFRASTRUCTURE
 - 31.12.01 Business Overview
 - 31.12.02 Service Offerings
- 31.13 BRIDGE DATA CENTRES
 - 31.13.01 Business Overview
 - 31.13.02 Service Offerings
- 31.14 CANBERRA DATA CENTRES
 - 31.14.01 Business Overview
 - 31.14.02 Service Offerings
- 31.15 CHAYORA
 - 31.15.01 Business Overview
 - 31.15.02 Service Offerings
 - 31.15.03 Key News
- 31.16 CHINA MOBILE INTERNATIONAL
 - 31.16.01 Business Overview
 - 31.16.02 Service Offerings
- 31.17 CHINA UNICOM
 - 31.17.01 Business Overview
 - 31.17.02 Service Offerings
- 31.18 CHINDATA
 - 31.18.01 Business Overview
 - 31.18.02 Service Offerings
 - 31.18.03 Key News
- 31.19 CHUNGHWA TELECOM
 - 31.19.01 Business Overview
 - 31.19.02 Service Offerings
- 31.20 COLOGIX
 - 31.20.01 Business Overview
 - 31.20.02 Service Offerings
- 31.21 COPT DATA CENTER SOLUTIONS

- 31.21.01 Business Overview
- 31.21.02 Service Offerings
- 31.22 CTRLS DATACENTERS
 - 31.22.01 Business Overview
 - 31.22.02 Service Offerings
- 31.23 CYXTERA TECHNOLOGIES
 - 31.23.01 Business Overview
 - 31.23.02 Service Offerings
- 31.24 DATA4
 - 31.24.01 Business Overview
 - 31.24.02 Service Offerings
- 31.25 DATABANK
 - 31.25.01 Business Overview
 - 31.25.02 Service Offerings
- 31.26 DIGIPLEX
 - 31.26.01 Business Overview
 - 31.26.02 Service Offerings
- 31.27 ECODATACENTER
 - 31.27.01 Business Overview
 - 31.27.02 Service Offerings
- 31.28 EDGECONNEX
 - 31.28.01 Business Overview
 - 31.28.02 Service Offerings
 - 31.28.03 Key News
- 31.29 EDGECORE INTERNET REAL ESTATE
 - 31.29.01 Business Overview
 - 31.29.02 Service Offerings
- 31.30 FIBRE CENTRE
 - 31.30.01 Business Overview
 - 31.30.02 Service Offerings
- 31.31 FIFTEENFORTYSEVEN CRITICAL SYSTEMS REALTY
 - 31.31.01 Business Overview
 - 31.31.02 Service Offerings
 - 31.31.03 Key News
- 31.32 FLEXENTIAL
 - 31.32.01 Business Overview
 - 31.32.02 Service Offerings
 - 31.32.03 Key News
- 31.33 GIGA DATA CENTERS

- 31.33.01 Business Overview
- 31.33.02 Service Offerings
- 31.33.03 Key News
- 31.34 GLOBALCONNECT
 - 31.34.01 Business Overview
 - 31.34.02 Service Offerings
- 31.35 GREEN MOUNTAIN
 - 31.35.01 Business Overview
 - 31.35.02 Service Offerings
- 31.36 H5 DATA CENTERS
 - 31.36.01 Business Overview
 - 31.36.02 Service Offerings
- 31.37 HOSTDIME
 - 31.37.01 Business Overview
 - 31.37.02 Service Offerings
- 31.38 INTERNET INITIATIVE JAPAN INC. (IIJ)
 - 31.38.01 Business Overview
 - 31.38.02 Service Offerings
- 31.39 IRON MOUNTAIN
 - 31.39.01 Business Overview
 - 31.39.02 Service Offerings
- 31.40 KDDI
 - 31.40.01 Business Overview
 - 31.40.02 Service Offerings
- 31.41 KEPPEL DATA CENTRES
 - 31.41.01 Business Overview
 - 31.41.02 Service Offerings
 - 31.41.03 Key News
- 31.42 MAINCUBES ONE
 - 31.42.01 Business Overview
 - 31.42.02 Service Offerings
- 31.43 MILLICOM (TIGO)
 - 31.43.01 Business Overview
 - 31.43.02 Service Offerings
- 31.44 NEXTDC
 - 31.44.01 Business Overview
 - 31.44.02 Service Offerings
 - 31.44.03 Key News
- 31.45 ODATA

- 31.45.01 Business Overview
- 31.45.02 Service Offerings
- 31.46 ORANGE
 - 31.46.01 Business Overview
 - 31.46.02 Service Offerings
- 31.47 PCCW SOLUTIONS
 - 31.47.01 Business Overview
 - 31.47.02 Service Offerings
- 31.48 PLDT ENTERPRISE
 - 31.48.01 Business Overview
 - 31.48.02 Service Offerings
- 31.49 PI DATA CENTERS
 - 31.49.01 Business Overview
 - 31.49.02 Service Offerings
 - 31.49.03 Key News
- 31.50 PRIME DATA CENTERS
 - 31.50.01 Business Overview
 - 31.50.02 Service Offerings
- 31.51 PRINCETON DIGITAL GROUP (PDG)
 - 31.51.01 Business Overview
 - 31.51.02 Services Offered
 - 31.51.03 Key News
- 31.52 PURECOLO
 - 31.52.01 Business Overview
 - 31.52.02 Service Offerings
- 31.53 RAXIO GROUP
 - 31.53.01 Business Overview
 - 31.53.02 Service Offerings
 - 31.53.03 Key News
- 31.54 REGAL ORION
 - 31.54.01 Business Overview
 - 31.54.02 Service Offerings
- 31.55 ROSTELECOM
 - 31.55.01 Business Overview
 - 31.55.02 Service Offerings
 - 31.55.03 Key News
- 31.56 SABEY DATA CENTER
 - 31.56.01 Business Overview
 - 31.56.02 Service Offerings

- 31.57 SCALA DATA CENTERS
 - 31.57.01 Business Overview
 - 31.57.02 Service Offerings
- 31.58 SHANGHAI ATRIUM (ATHUB)
 - 31.58.01 Business Overview
 - 31.58.02 Service Offerings
- 31.59 SIFY TECHNOLOGIES
 - 31.59.01 Business Overview
 - 31.59.02 Service Offerings
 - 31.59.03 Key News
- 31.60 SINGTEL
 - 31.60.1 Business Overview
 - 31.60.2 Service Offerings
- 31.61 SPACE DC
 - 31.61.1 Business Overview
 - 31.61.2 Service Offerings
 - 31.61.3 Key News
- 31.62 STACK INFRASTRUCTURE
 - 31.62.1 Business Overview
 - 31.62.2 Service Offerings
- 31.63 STREAM DATA CENTERS
 - 31.63.1 Business Overview
 - 31.63.2 Service Offerings
- 31.64 SUNEVISION (IADVANTAGE)
 - 31.64.1 Business Overview
 - 31.64.2 Service Offerings
- 31.65 SWITCH
 - 31.65.1 Business Overview
 - 31.65.2 Service Offerings
- 31.66 T5 DATA CENTERS
 - 31.66.1 Business Overview
 - 31.66.2 Service Offerings
- 31.67 TELECOM ITALIA SPARKLE
 - 31.67.1 Business Overview
 - 31.67.2 Service Offerings
- 31.68 TENGLONG HOLDINGS GROUP (TAMRON)
 - 31.68.1 Business Overview
 - 31.68.2 Service Offerings
- 31.69 TERACO DATA ENVIRONMENTS

- 31.69.1 Business Overview
- 31.69.2 Service Offerings
- 31.69.3 Key News
- 31.7 TIERPOINT
 - 31.70.1 Business Overview
 - 31.70.2 Service Offerings
- 31.71 TURKCELL
 - 31.71.1 Business Overview
 - 31.71.2 Service Offerings
- 31.72 URBACON DATA CENTRE SOLUTIONS
 - 31.72.1 Business Overview
 - 31.72.2 Service Offerings
- 31.73 US SIGNAL
 - 31.73.1 Business Overview
 - 31.73.2 Service Offerings
- 31.74 WINGU
 - 31.74.1 Business Overview
 - 31.74.2 Service Offerings
 - 31.74.3 Key News
- 31.75 WORLDSTREAM
 - 31.75.1 Business Overview
 - 31.75.2 Service Offerings
- 31.76 YANDEX CLOUD
 - 31.76.1 Business Overview
 - 31.76.2 Service Offerings
- 31.77 YOTTA INFRASTRUCTURE solutions (HIRANANDANI GROUP)
 - 31.77.1 Business Overview
 - 31.77.2 Service Offerings
 - 31.77.3 Key News
- 31.78 ZAYO GROUP
 - 31.78.1 Business Overview
 - 31.78.2 Service Offerings

32 NEW ENTRANTS

- 32.1 ADANICONNEX
 - 32.01.01 Business Overview
 - 32.01.02 Service Offerings
- 32.2 CIRRUS DATA SERVICES

- 32.02.01 Business Overview
- 32.02.02 Service Offerings
- 32.3 CLOUDHQ
 - 32.03.01 Business Overview
 - 32.03.02 Service Offerings
- 32.4 DIGITAL EDGE
 - 32.04.01 Business Overview
 - 32.04.02 Service Offerings
- 32.5 ECHELON DATA CENTRES
 - 32.05.01 Business Overview
 - 32.05.02 Service Offerings
 - 32.05.03 Key News
- 32.6 EDGEMICRO
 - 32.06.01 Business Overview
 - 32.06.02 Service Offerings
- 32.7 EDGEX DATA CENTERS
 - 32.07.01 Business Overview
 - 32.07.02 Service Offerings
- 32.8 ELEMENT CRITICAL
 - 32.08.01 Business Overview
 - 32.08.02 Service Offerings
- 32.9 GLOBAL TECHNICAL REALTY
 - 32.09.01 Business Overview
 - 32.09.02 Service Offerings
- 32.10 IXFRICA
 - 32.10.01 Business Overview
 - 32.10.02 Service Offerings
- 32.11 MANTRA DATA CENTERS
 - 32.11.01 Business Overview
 - 32.11.02 Service Offerings
 - 32.11.03 Key News
- 32.12 NOVVA
 - 32.12.01 Business Overview
 - 32.12.02 Service Offerings
- 32.13 POINTONE
 - 32.13.01 Business Overview
 - 32.13.02 Service Offerings
- 32.14 QUANTUM LOOPHOLE
 - 32.14.01 Business Overview

- 32.14.02 Service Offerings
- 32.15 STRATUS DC MANAGEMENT
 - 32.15.01 Business Overview
 - 32.15.02 Service Offerings

33 REPORT SUMMARY

33.1 KEY TAKEAWAYS

34 QUANTITATIVE SUMMARY

- 34.1 GLOBAL DATA CENTER COLOCATION MARKET
 - 34.01.01 Market Size
 - 34.01.02 Colocation Services by Type: Market Size & Forecast
 - 34.01.03 Infrastructure: Market Size & Forecast
 - 34.01.04 Electrical Infrastructure: Market Size & Forecast
 - 34.01.05 Mechanical Infrastructure: Market Size & Forecast
 - 34.01.06 Cooling Systems: Market Size & Forecast
 - 34.01.07 General Construction: Market Size & Forecast
 - 34.01.08 Tier Standards: Market Size & Forecast
- 34.2 GEOGRAPHY
 - 34.02.01 Colocation Investment by Region
 - 34.02.02 Colocation Area by Region
 - 34.02.03 Colocation Power Capacity by Region
 - 34.02.04 Colocation Revenue by Region
- 34.3 NORTH AMERICA
 - 34.03.01 North America: Market Size
 - 34.03.02 North America: Infrastructure
 - 34.03.03 North America: Colocation Services Market by Type
- 34.4 US
 - 34.04.01 US: Market Size
 - 34.04.02 US: Colocation Services by Type
 - 34.04.03 US: Market by Infrastructure
- 34.5 CANADA
 - 34.05.01 Canada: Market Size
 - 34.05.02 Canada: Infrastructure
 - 34.05.03 Canada: Colocation Services Market by Type
- 34.6 LATIN AMERICA
 - 34.06.01 Latin America: Market Size

- 34.06.02 Latin America: Infrastructure
- 34.06.03 Latin America: Colocation Services Market by Type
- 34.7 BRAZIL
 - 34.07.01 Brazil: Market Size
 - 34.07.02 Brazil: Infrastructure
 - 34.07.03 Brazil: Colocation Services Market by Type
- 34.8 OTHER LATIN AMERICA COUNTRIES
 - 34.08.01 Other Latin America Countries: Market Size
 - 34.08.02 Other Latin America Countries: Infrastructure
 - 34.08.03 Other Latin America Countries: Colocation Services Market by Type
- 34.9 WESTERN EUROPE
 - 34.09.01 Western Europe: Market Size
 - 34.09.02 Western Europe: Infrastructure
 - 34.09.03 Western Europe: Colocation Services Market by Type
- 34.10 UK
 - 34.10.01 UK: Market Size
 - 34.10.02 UK: Infrastructure
 - 34.10.03 UK: Colocation Services Market by Type
- 34.11 GERMANY
 - 34.11.01 Germany: Market Size
 - 34.11.02 Germany: Infrastructure
 - 34.11.03 Germany: Colocation Services Market by Type
- 34.12 NETHERLANDS
 - 34.12.01 Netherlands: Market Size
 - 34.12.02 Netherlands: Infrastructure
 - 34.12.03 Netherlands: Colocation Services Market by Type
- 34.13 FRANCE
 - 34.13.01 France: Market Size
 - 34.13.02 France: Infrastructure
 - 34.13.03 France: Colocation Services Market by Type
- 34.14 IRELAND
 - 34.14.01 Ireland: Market Size
 - 34.14.02 Ireland: Infrastructure
 - 34.14.03 Ireland: Colocation Services Market by Type
- 34.15 SWITZERLAND
 - 34.15.01 Switzerland: Market Size
 - 34.15.02 Switzerland: Infrastructure
 - 34.15.03 Switzerland: Colocation Services Market by Type
- 34.16 ITALY

- 34.16.01 Italy: Market Size
- 34.16.02 Italy: Infrastructure
- 34.16.03 Italy: Colocation Services Market by Type
- 34.17 SPAIN
 - 34.17.01 Spain: Market Size
 - 34.17.02 Spain: Infrastructure
 - 34.17.03 Spain: Colocation Services Market by Type
- 34.18 OTHER WESTERN EUROPEAN COUNTRIES
 - 34.18.01 Other Western European Countries: Market Size
 - 34.18.02 Other Western European Countries: Infrastructure
 - 34.18.03 Other Western European Countries: Colocation Services Market by Type
- 34.19 NORDIC REGION
 - 34.19.01 Nordic Region: Market Size
 - 34.19.02 Nordic Region: Infrastructure
 - 34.19.03 Nordic Region: Colocation Services Market by Type
- 34.2 DENMARK
 - 34.20.01 Denmark: Market Size
 - 34.20.02 Denmark: Infrastructure
 - 34.20.03 Denmark: Colocation Services Market by Type
- 34.21 SWEDEN
 - 34.21.01 Sweden: Market Size
 - 34.21.02 Sweden: Infrastructure
 - 34.21.03 Sweden: Colocation Services Market by Type
- 34.22 NORWAY
 - 34.22.01 Norway: Market Size
 - 34.22.02 Norway: Infrastructure
 - 34.22.03 Norway: Colocation Services Market by Type
- 34.23 FINLAND & ICELAND
 - 34.23.01 Finland & Iceland: Market Size
 - 34.23.02 Finland & Iceland: Infrastructure
 - 34.23.03 Finland & Iceland: Colocation Services Market by Type
- 34.24 CENTRAL & EASTERN EUROPE
 - 34.24.01 Central & Eastern Europe: Market Size
 - 34.24.02 Central & Eastern Europe: Infrastructure
 - 34.24.03 Central & Eastern Europe: Colocation Services Market by Type
- 34.25 RUSSIA & CZECH REPUBLIC
 - 34.25.01 Russia & Czech Republic: Market Size
 - 34.25.02 Russia & Czech Republic: Infrastructure
 - 34.25.03 Russia & Czech Republic: Colocation Services Market by Type

34.26 POLAND & AUSTRIA

34.26.01 Poland & Austria: Market Size

34.26.02 Poland & Austria: Infrastructure

34.26.03 Poland & Austria: Colocation Services Market by Type

34.27 OTHER CENTRAL & EASTERN EUROPEAN COUNTRIES

34.27.01 Other Central & Eastern European Countries: Market Size

34.27.02 Other Central & Eastern European Countries: Infrastructure

34.27.03 Other Central & Eastern European Countries: Colocation Services Market by Type

34.28 MIDDLE EAST

34.28.01 Middle East: Market Size

34.28.02 Middle East: Infrastructure

34.28.03 Middle East: Colocation Services Market by Type

34.29 UAE

34.29.01 UAE: Market Size

34.29.02 UAE: Infrastructure

34.29.03 UAE: Colocation Services Market by Type

34.3 SAUDI ARABIA

34.30.01 Saudi Arabia: Market Size

34.30.02 Saudi Arabia: Infrastructure

34.30.03 Saudi Arabia: Colocation Services Market by Type

34.31 TURKEY

34.31.01 Turkey: Market Size

34.31.02 Turkey: Infrastructure

34.31.03 Turkey: Colocation Services Market by Type

34.32 OTHER MIDDLE EASTERN COUNTRIES

34.32.01 Other Middle Eastern Countries: Market Size

34.32.02 Other Middle Eastern Countries: Infrastructure

34.32.03 Central & Eastern Europe: Colocation Services Market by Type

34.33 AFRICA

34.33.01 Africa: Market Size

34.33.02 Africa: Infrastructure

34.33.03 Africa: Colocation Services Market by Type

34.34 SOUTH AFRICA

34.34.01 South Africa: Market Size

34.34.02 South Africa: Infrastructure

34.34.03 South Africa: Colocation Services Market by Type

34.35 KENYA

34.35.01 Kenya: Market Size

- 34.35.02 Kenya: Infrastructure
- 34.35.03 Kenya: Colocation Services Market by Type
- 34.36 OTHER AFRICAN COUNTRIES
 - 34.36.01 Other African Countries: Market Size
 - 34.36.02 Other African Countries: Infrastructure
 - 34.36.03 Other African Countries: Colocation Services Market by Type
- 34.37 APAC
 - 34.37.01 APAC: Market Size
 - 34.37.02 APAC: Infrastructure
 - 34.37.03 APAC: Colocation Services Market by Type
- 34.38 CHINA & HONG KONG
 - 34.38.01 China & Hong Kong: Market Size
 - 34.38.02 China & Hong Kong: Infrastructure
 - 34.38.03 China & Hong Kong: Colocation Services Market By Type
- 34.39 AUSTRALIA & NEW ZEALAND
 - 34.39.01 Australia & New Zealand: Market Size
 - 34.39.02 Australia & New Zealand: Infrastructure
 - 34.39.03 Australia & New Zealand: Colocation Services Market By Type
- 34.4 INDIA
 - 34.40.01 India: Market Size
 - 34.40.02 India: Infrastructure
 - 34.40.03 India: Colocation Services Market By Type
- 34.41 JAPAN
 - 34.41.01 Japan: Market Size
 - 34.41.02 Japan: Infrastructure
 - 34.41.03 Japan: Colocation Services Market By Type
- 34.42 REST OF APAC
 - 34.42.01 Rest of APAC: Market Size
 - 34.42.02 Rest of APAC: Infrastructure
 - 34.42.03 Rest of APAC: Colocation Services Market By Type
- 34.43 SOUTHEAST ASIA
 - 34.43.01 Southeast Asia: Market Size
 - 34.43.02 Southeast Asia: Infrastructure
 - 34.43.03 Southeast Asia: Colocation Services Market By Type
- 34.44 SINGAPORE
 - 34.44.01 Singapore: Market Size
 - 34.44.02 Singapore: Infrastructure
 - 34.44.03 Singapore: Colocation Services Market By Type
- 34.45 INDONESIA

34.45.01 Indonesia: Market Size

34.45.02 Indonesia: Infrastructure

34.45.03 Indonesia: Colocation Services Market By Type

34.46 MALAYSIA

34.46.01 Malaysia: Market Size

34.46.02 Malaysia: Infrastructure

34.46.03 Malaysia: Colocation Services Market By Type

34.47 THAILAND

34.47.01 Thailand: Market Size

34.47.02 Thailand: Infrastructure

34.47.03 Thailand: Colocation Services Market By Type

34.48 OTHER SOUTHEAST ASIAN COUNTRIES

34.48.01 Other Southeast Asian Countries: Market Size

34.48.02 Other Southeast Asian Countries: Infrastructure

34.48.03 Other Southeast Asian Countries: Colocation Services Market By Type

35 APPENDIX

35.1 Abbreviations

List Of Exhibits

LIST OF EXHIBITS

- Exhibit 1 Segmentation of Global Data Center Colocation Market
- Exhibit 2 Market Size Calculation Approach 2020
- Exhibit 3 Data Center Site Selection Criteria
- Exhibit 4 Average Electricity Pricing 2020 (per kW)
- Exhibit 5 Impact of Rising Adoption of Renewable Energy by Colocation Providers
- Exhibit 6 Impact of M&As & Partnerships to Improve Colocation Share
- Exhibit 7 Global M&A Activities in 2020 & 2021
- Exhibit 8 Impact of Growing Rack Power Density
- Exhibit 9 Average Data Center Rack Density by Regions 2020–2024 (in kW)
- Exhibit 10 Impact of 5G Adoption Driving Demand for Edge Data Centers
- Exhibit 11 Impact of Increased Demand for Cloud Services
- Exhibit 12 Impact of Increase in Submarine Cable Deployment
- Exhibit 13 Submarine Cable Connectivity Projects 2020
- Exhibit 14 Impact of Increased Adoption of OCP & Hyperscale-Specific Infrastructure
- Exhibit 15 Impact of Growing Adoption of Li-Ion Batteries & Fuel Cells
- Exhibit 16 Comparison of Lithium-ion Batteries & VRLA Batteries in UPS Systems (Power)
- Exhibit 17 TCO: VRLA vs Lithium-ion
- Exhibit 18 Impact of COVID-19 on Colocation Data Centers
- Exhibit 19 Impact of Rising Hyperscale Deployments by Colocation Providers
- Exhibit 20 Number of Hyperscale Projects by Geographic Regions (2020)
- Exhibit 21 Impact of Tax Incentives Save Colocation OPEX & Customer Costs
- Exhibit 22 Impact of Construction of Green Data Center Facilities
- Exhibit 23 Impact of Data Regulations to Increase Investments
- Exhibit 24 Impact of Location Constraints for Data Center Construction
- Exhibit 25 Impact of Rising Carbon Emissions from Data Centers
- Exhibit 26 Impact of Dearth of Skilled Workforce
- Exhibit 27 Impact of OPEX Driven by High Maintenance Cost & Inefficiency
- Exhibit 28 UPS System CAPEX vs OPEX
- Exhibit 29 Global Data Center Colocation Market 2020?2026 (\$ billion)
- Exhibit 30 Global Data Center Colocation Market by Area 2020?2026 (Million Square Feet)
- Exhibit 31 Global Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 32 Global Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

- Exhibit 33 Five Forces Analysis 2020
- Exhibit 34 Incremental Growth by Colocation Services 2020 & 2026
- Exhibit 35 Europe Data Center Colocation Market by Colocation Services
- Exhibit 36 Global Data Center Retail Colocation Market 2020?2026 (\$ billion)
- Exhibit 37 Global Data Center Wholesale Colocation Market 2020?2026 (\$ billion)
- Exhibit 38 Incremental Growth by Infrastructure 2020 & 2026
- Exhibit 39 Europe Data Center Colocation Market by Infrastructure
- Exhibit 40 Global Data Center Colocation Electrical Infrastructure Market 2020?2026 (\$ billion)
- Exhibit 41 Global Data Center Colocation Mechanical Infrastructure Market 2020?2026 (\$ billion)
- Exhibit 42 Global Data Center Colocation General Construction Market 2020?2026 (\$ billion)
- Exhibit 43 Incremental Growth by Electrical Infrastructure 2020 & 2026
- Exhibit 44 Global Data Center Colocation UPS Systems Market 2020?2026 (\$ billion)
- Exhibit 45 Global Data Center Colocation Generator Market 2020?2026 (\$ billion)
- Exhibit 46 Global Data Center Colocation Transfer Switches & Switchgear Market 2020?2026 (\$ billion)
- Exhibit 47 Global Data Center Colocation PDU Market 2020?2026 (\$ billion)
- Exhibit 48 Global Data Center Colocation Other Electrical Infrastructure Market 2020?2026 (\$ billion)
- Exhibit 49 Incremental Growth by Mechanical Infrastructure 2020 & 2026
- Exhibit 50 Global Data Center Colocation Cooling Systems Market 2020?2026 (\$ billion)
- Exhibit 51 Global Data Center Colocation Rack Market 2020?2026 (\$ billion)
- Exhibit 52 Global Data Center Colocation Other Mechanical Infrastructure Market 2020?2026 (\$ billion)
- Exhibit 53 Incremental Growth by Cooling Systems 2020 & 2026
- Exhibit 54 Global Data Center Colocation CRAC & CRAH Market 2020?2026 (\$ billion)
- Exhibit 55 Global Data Center Colocation Chiller Market 2020?2026 (\$ billion)
- Exhibit 56 Global Data Center Colocation Cooling Towers, Condensers & Dry Coolers Market 2020?2026 (\$ billion)
- Exhibit 57 Global Data Center Colocation Economizers & Evaporative Coolers Market 2020?2026 (\$ billion)
- Exhibit 58 Global Data Center Colocation Other Cooling Units Market 2020?2026 (\$ billion)
- Exhibit 59 Incremental Growth by General Construction 2020 & 2026
- Exhibit 60 Global Data Center Colocation Core & Shell Development Market 2020?2026 (\$ billion)
- Exhibit 61 Global Data Center Colocation Installation & Commissioning Services Market

2020?2026 (\$ billion)

Exhibit 62 Global Data Center Colocation Building & Engineering Design Market

2020?2026 (\$ billion)

Exhibit 63 Global Data Center Colocation Physical Security Market 2020?2026 (\$ billion)

Exhibit 64 Global Data Center Colocation DCIM/BMS Market 2020?2026 (\$ billion)

Exhibit 65 Incremental Growth by Tier Standards 2020 & 2026

Exhibit 66 Global Tier I & Tier II Data Center Colocation Market 2020?2026 (\$ billion)

Exhibit 67 Global Tier III Data Center Colocation Market 2020?2026 (\$ billion)

Exhibit 68 Global Tier IV Data Center Colocation Market 2020?2026 (\$ billion)

Exhibit 69 Incremental Growth by Geography 2020 & 2026

Exhibit 70 Incremental Growth by Geography 2020 & 2026

Exhibit 71 Incremental Growth by Geography 2020 & 2026

Exhibit 72 Incremental Growth by Geography 2020 & 2026

Exhibit 73 Incremental Growth by Geography Investment 2020 & 2026

Exhibit 74 Incremental Growth in North America by Investment 2020 & 2026

Exhibit 75 Incremental Growth in North America by Area 2020 & 2026

Exhibit 76 Incremental Growth in North America by Power Capacity 2020 & 2026

Exhibit 77 Incremental Growth in North America by Support Infrastructure 2020 & 2026

Exhibit 78 Incremental Growth in North America by Revenue 2020 & 2026

Exhibit 79 North America Data Center Colocation Market by Investment 2020?2026 (\$ million)

Exhibit 80 North America Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 81 North America Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 82 North America Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 83 North America Data Center Colocation Market by Revenue 2020?2026 (\$ billion)

Exhibit 84 North America Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 85 Snapshot: Colocation Market in US 2020 & 2026

Exhibit 86 US Data Center Colocation Market by Investment 2020?2026 (\$ million)

Exhibit 87 Upcoming Data Center Colocation Projects in US

Exhibit 88 US Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 89 US Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 90 US Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

- Exhibit 91 US Data Center Colocation Market by Revenue 2020?2026 (\$ billion)
- Exhibit 92 US Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 93 Snapshot: Colocation Market in Canada 2020 & 2026
- Exhibit 94 Canada Data Center Colocation Market by Investment 2020–2026 (\$ million)
- Exhibit 95 Canada Data Center Colocation Market by Area 2020–2026 (million sq ft.)
- Exhibit 96 Canada Data Center Colocation Market by Power Capacity 2020–2026 (MW)
- Exhibit 97 Canada Data Center Colocation Market by Support Infrastructure 2020–2026 (\$ million)
- Exhibit 98 Canada Data Center Colocation Market by Colocation Revenue 2020–2026 (\$ billion)
- Exhibit 99 Canada Data Center Colocation Market by Colocation Revenue 2020–2026 (\$ billion)
- Exhibit 100 Incremental Growth in Latin America by Investment 2020 & 2026
- Exhibit 101 Incremental Growth in Latin America by Area 2020 & 2026
- Exhibit 102 Incremental Growth in Latin America by Power Capacity 2020 & 2026
- Exhibit 103 Incremental Growth in Latin America by Support Infrastructure 2020 & 2026
- Exhibit 104 Incremental Growth in Latin America by Revenue 2020 & 2026
- Exhibit 105 Latin America Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 106 Latin America Data Center Colocation Market by Area 2020?2026 (million square feet)
- Exhibit 107 Latin America Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 108 Latin America Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 109 Latin America Data Center Colocation Market by Revenue 2020?2026 (\$ billion)
- Exhibit 110 Latin America Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 111 Snapshot: Colocation Market in Brazil 2020 & 2026
- Exhibit 112 Upcoming Data Center Colocation Projects in Brazil
- Exhibit 113 Brazil Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 114 Brazil Data Center Colocation Market by Area 2020?2026 (million square feet)
- Exhibit 115 Brazil Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 116 Brazil Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 117 Brazil Data Center Colocation Market by Revenue 2020?2026 (\$ billion)

- Exhibit 118 Brazil Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 119 Snapshot: Colocation Market in Other Latin American Countries 2020 & 2026
- Exhibit 120 Other Latin American Countries Data Center Colocation Market by Investment 2020–2026 (\$ million)
- Exhibit 121 Upcoming Data Center Colocation Projects in Other Latin American Countries
- Exhibit 122 Other Latin American Countries Data Center Colocation Market by Area 2020–2026 (million square feet)
- Exhibit 123 Other Latin American Countries Data Center Colocation Market by Power Capacity 2020–2026 (MW)
- Exhibit 124 Other Latin American Countries Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 125 Other Latin American Countries Data Center Colocation Market by Revenue 2020–2026 (\$ billion)
- Exhibit 126 Other Latin American Countries Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 127 Incremental Growth in Western Europe by Investment 2020 & 2026
- Exhibit 128 Incremental Growth in Western Europe by Area 2020 & 2026
- Exhibit 129 Incremental Growth in Western Europe by Power Capacity 2020 & 2026
- Exhibit 130 Incremental Growth in Western Europe by Infrastructure Investment 2020 & 2026
- Exhibit 131 Incremental Growth in Western Europe by Colocation Revenue 2020 & 2026
- Exhibit 132 Western Europe Data Center Colocation Market 2020?2026 (\$ billion)
- Exhibit 133 Western Europe Data Center Colocation Market by Area 2020?2026 (million square feet)
- Exhibit 134 Western Europe Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 135 Western Europe Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 136 Western Europe Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 137 Western Europe Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 138 Snapshot: Colocation Market in UK 2020 & 2026
- Exhibit 139 UK Data Center Colocation Market by Investment 2020?2026 (\$ billion)
- Exhibit 140 UK Data Center Colocation Market by Area 2020?2026 (million square feet)

- Exhibit 141 UK Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 142 UK Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 143 UK Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 144 UK Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 145 Snapshot: Colocation Market in Germany 2020 & 2026
- Exhibit 146 Germany Data Center Colocation Market by Investment 2020?2026 (\$ billion)
- Exhibit 147 Germany Data Center Colocation Market by Area 2020?2026 (million square feet)
- Exhibit 148 Germany Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 149 Germany Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 150 Germany Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 151 Germany Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 152 Snapshot: Colocation Market in France 2020 & 2026
- Exhibit 153 France Data Center Colocation Market by Investment 2020?2026 (\$ billion)
- Exhibit 154 France Data Center Colocation Market by Area 2020?2026 (million square feet)
- Exhibit 155 France Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 156 France Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 157 France Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 158 France Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 159 Snapshot: Colocation Market in Netherlands 2020 & 2026
- Exhibit 160 Netherlands Data Center Colocation Market 2020?2026 (\$ billion)
- Exhibit 161 Netherlands Data Center Colocation Market by Area 2020?2026 (million square feet)
- Exhibit 162 Netherlands Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 163 Netherlands Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 164 Netherlands Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 165 Netherlands Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 166 Snapshot: Colocation Market in Ireland 2020 & 2026

Exhibit 167 Ireland Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 168 Ireland Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 169 Ireland Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 170 Ireland Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 171 Ireland Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 172 Ireland Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 173 Snapshot: Colocation Market in Italy 2020 & 2026

Exhibit 174 Italy Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 175 Italy Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 176 Italy Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 177 Italy Data Center Colocation Support Infrastructure Market 2020?2026 (\$ billion)

Exhibit 178 Italy Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 179 Italy Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 180 Snapshot: Colocation Market in Switzerland 2020 & 2026

Exhibit 181 Switzerland Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 182 Switzerland Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 183 Switzerland Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 184 Switzerland Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 185 Switzerland Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 186 Switzerland Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 187 Snapshot: Colocation Market in Spain 2020 & 2026

Exhibit 188 Spain Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 189 Spain Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 190 Spain Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 191 Spain Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 192 Spain Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 193 Spain Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 194 Snapshot: Colocation Market in Other Western European Countries 2020 & 2026

Exhibit 195 Other Western European Countries Data Center Colocation Market 2020?2026 (\$ billion)

Exhibit 196 Other Western European Countries Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 197 Other Western European Countries Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 198 Other Western European Countries Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 199 Other Western European Countries Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 200 Other Western European Countries Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 201 Incremental Growth in Nordics by Investment 2020 & 2026

Exhibit 202 Incremental Growth in Nordics by Colocation Revenue 2020 & 2026

Exhibit 203 Incremental Growth in Nordics by Area 2020 & 2026

Exhibit 204 Incremental Growth in Nordics by Power Capacity 2020 & 2026

Exhibit 205 Incremental Growth in Nordics by Infrastructure Investment 2020 & 2026

Exhibit 206 Nordic Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 207 Nordic Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 208 Nordic Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 209 Nordic Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 210 Nordic Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 211 Nordic Data Center Colocation Market by Colocation Revenue 2020?2026

(\$ billion)

Exhibit 212 Snapshot: Colocation Market in Denmark 2020 & 2026

Exhibit 213 Denmark Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 214 Denmark Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 215 Denmark Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 216 Denmark Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 217 Denmark Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 218 Denmark Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 219 Snapshot: Colocation Market in Sweden 2020 & 2026

Exhibit 220 Sweden Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 221 Sweden Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 222 Sweden Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 223 Sweden Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 224 Sweden Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 225 Sweden Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 226 Snapshot: Colocation Market in Norway 2020 & 2026

Exhibit 227 Norway Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 228 Norway Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 229 Norway Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 230 Norway Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 231 Norway Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 232 Norway Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 233 Snapshot: Colocation Market in Finland & Iceland 2020 & 2026

Exhibit 234 Finland & Iceland Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 235 Finland & Iceland Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 236 Finland & Iceland Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 237 Finland & Iceland Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 238 Finland & Iceland Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 239 Finland & Iceland Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 240 Incremental Growth in Central & Eastern Europe by Investment 2020 & 2026

Exhibit 241 Incremental Growth in Central & Eastern Europe by Area 2020 & 2026

Exhibit 242 Incremental Growth in Central & Eastern Europe by Power Capacity 2020 & 2026

Exhibit 243 Incremental Growth in Central & Eastern Europe by Infrastructure Investment 2020 & 2026

Exhibit 244 Incremental Growth in Central & Eastern Europe by Colocation Revenue 2020 & 2026

Exhibit 245 Central & Eastern Europe Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 246 Central & Eastern Europe Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 247 Central & Eastern Europe Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 248 Central & Eastern Europe Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 249 Central & Eastern Europe Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 250 Central & Eastern Europe Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 251 Snapshot: Colocation Market in Russia & Czech Republic 2020 & 2026

Exhibit 252 Russia & Czech Republic Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 253 Russia & Czech Republic Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 254 Russia & Czech Republic Data Center Colocation Market by Power

Capacity 2020?2026 (MW)

Exhibit 255 Russia & Czech Republic Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 256 Russia & Czech Republic Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 257 Russia & Czech Republic Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 258 Snapshot: Colocation Market in Poland & Austria 2020 & 2026

Exhibit 259 Poland & Austria Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 260 Poland & Austria Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 261 Poland & Austria Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 262 Poland & Austria Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 263 Poland & Austria Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 264 Poland & Austria Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 265 Snapshot: Colocation Market in Other Central & Eastern European Countries 2020 & 2026

Exhibit 266 Other Central & Eastern European Countries Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 267 Other Central & Eastern European Countries Data Center Colocation Market by Area 2020?2026 (million square feet)

Exhibit 268 Other Central & Eastern European Countries Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 269 Other Central & Eastern European Countries Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 270 Other Central & Eastern European Countries Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 271 Other CEE Countries Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 272 Incremental Growth in Middle East by Investment 2020 & 2026

Exhibit 273 Incremental Growth in Middle East by Area 2020 & 2026

Exhibit 274 Incremental Growth in Middle East by Power Capacity 2020 & 2026

Exhibit 275 Incremental Growth in Middle East by Infrastructure Investment 2020 & 2026

- Exhibit 276 Incremental Growth in Middle East by Colocation Revenue 2020 & 2026
- Exhibit 277 Middle East Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 278 Middle East Data Center Colocation Market by Area 2020?2026 (thousand square feet)
- Exhibit 279 Middle East Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 280 Middle East Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 281 Middle East Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 282 Middle East Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 283 UAE Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 284 UAE Data Center Colocation Market by Area 2020?2026 (Thousand Square Feet)
- Exhibit 285 UAE Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 286 UAE Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 287 UAE Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 288 UAE Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 289 Saudi Arabia Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 290 Saudi Arabia Data Center Colocation Market by Area 2020?2026 (Thousand Square Feet)
- Exhibit 291 Saudi Arabia Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 292 Saudi Arabia Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 293 Saudi Arabia Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 294 Saudi Arabia Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 295 Turkey Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 296 Turkey Data Center Colocation Market by Area 2020?2026 (Thousand Square Feet)
- Exhibit 297 Turkey Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 298 Turkey Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

- Exhibit 299 Turkey Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 300 Turkey Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 301 Other Middle Eastern Countries Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 302 Other Middle Eastern Countries Data Center Colocation Market by Area 2020?2026 (Thousand Square Feet)
- Exhibit 303 Other Middle Eastern Countries Data Center Market by Power Capacity 2020?2026 (MW)
- Exhibit 304 Other Middle Eastern Countries Data Center Colocation Infrastructure Market 2020?2026 (\$ million)
- Exhibit 305 Other Middle Eastern Countries Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 306 Other Middle Eastern Countries Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 307 Incremental Growth in Africa by Investment 2020 & 2026
- Exhibit 308 Incremental Growth in Africa by Colocation Revenue 2020 & 2026
- Exhibit 309 Incremental Growth in Africa by Area 2020 & 2026
- Exhibit 310 Incremental Growth in Africa by Power Capacity 2020 & 2026
- Exhibit 311 Incremental Growth in Africa by Support Infrastructure 2020 & 2026
- Exhibit 312 Africa Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 313 Africa Data Center Colocation Market by Area 2020?2026 (thousand square feet)
- Exhibit 314 Africa Data Center Colocation Market by Power Capacity 2020?2026 (\$ million)
- Exhibit 315 Africa Data Center Colocation Support Infrastructure Market (\$ million)
- Exhibit 316 Africa Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 317 Africa Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 318 South Africa Data Center Colocation Market by Investment 2020–2026 (\$ million)
- Exhibit 319 South Africa Data Center Colocation Market by Area 2020–2026 (thousand square feet)
- Exhibit 320 South Africa Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 321 South Africa Data Center Support Infrastructure Market (\$ million)
- Exhibit 322 South Africa Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 323 South Africa Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 324 Kenya Data Center Colocation Market by Investment 2020–2026 (\$ million)

- Exhibit 325 Kenya Data Center Colocation Market by Area 2020–2026 (thousand square feet)
- Exhibit 326 Kenya Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 327 Kenya Data Center Colocation Support Infrastructure Market (\$ million)
- Exhibit 328 Kenya Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 329 Kenya Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 330 Other African Countries Data Center Colocation Market by Investment 2020–2026 (\$ million)
- Exhibit 331 Other African Countries Data Center Colocation Market by Area 2020–2026 (thousand square feet)
- Exhibit 332 Other African Countries Data Center Colocation Market by Power Capacity 2020–2026 (MW)
- Exhibit 333 Other African Countries Data Center Support Infrastructure Market 2020–2026 (\$ million)
- Exhibit 334 Other African Countries Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 335 Other African Countries Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 336 Incremental Growth in APAC by Investment 2020 & 2026
- Exhibit 337 Incremental Growth in APAC by Area 2020 & 2026
- Exhibit 338 Incremental Growth in APAC by Power Capacity 2020 & 2026
- Exhibit 339 Incremental Growth in APAC by Support Infrastructure 2020 & 2026
- Exhibit 340 Incremental Growth in APAC by Revenue 2020 & 2026
- Exhibit 341 APAC Data Center Colocation Market by Investment 2020?2026 (\$ billion)
- Exhibit 342 APAC Data Center Colocation Market Investment by Area 2020?2026 (million square feet)
- Exhibit 343 APAC Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 344 APAC Data Center Colocation Support Infrastructure Market 2020–2026 (\$ million)
- Exhibit 345 APAC Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 346 APAC Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 347 Snapshot: Colocation Market in China & Hong Kong 2020 & 2026
- Exhibit 348 Data Center Colocation Market in China & Hong Kong 2020?2026 (\$ billion)
- Exhibit 349 Data Center Colocation Market in China & Hong Kong by Area 2020?2026 (Million Square Feet)
- Exhibit 350 Data Center Colocation Market in China & Hong Kong by Power Capacity 2020?2026 (MW)

Exhibit 351 Data Center Colocation Support Infrastructure Market in China & Hong Kong 2020?2026 (\$ billion)

Exhibit 352 Data Center Colocation Market in China & Hong Kong by Colocation Revenue 2020–2026 (\$ million)

China & Hong Kong Data Center Colocation Market 2020?2026 (\$ million)

Exhibit 353 Snapshot: Colocation Market in Australia & New Zealand 2020 & 2026

Exhibit 354 Data Center Colocation Market in Australia & New Zealand 2020?2026 (\$ billion)

Exhibit 355 Data Center Colocation Market in Australia & New Zealand by Area 2020?2026 (Million Square Feet)

Exhibit 356 Data Center Colocation Market in Australia & New Zealand by Power Capacity 2020?2026 (MW)

Exhibit 357 Data Center Colocation Support Infrastructure Market in Australia & New Zealand 2020?2026 (\$ billion)

Exhibit 358 Data Center Colocation Market in Australia & New Zealand by Colocation Revenue 2020–2026 (\$ billion)

Exhibit 359 Australia & New Zealand Data Center Colocation Market 2020?2026 (\$ billion)

Exhibit 360 Snapshot: Colocation Market in India 2020 & 2026

Exhibit 361 Data Center Colocation Market in India by Investment 2020?2026 (\$ million)

Exhibit 362 Data Center Colocation Market in India by Area 2020?2026 (Million Square Feet)

Exhibit 363 Data Center Colocation Market in India by Power Capacity 2020?2026 (MW)

Exhibit 364 Data Center Colocation Support Infrastructure Market in India 2020?2026 (\$ billion)

Exhibit 365 Data Center Colocation Market in India by Revenue 2020–2026 (\$ billion)

Exhibit 366 India Data Center Colocation Market 2020?2026 (\$ billion)

Exhibit 367 Snapshot: Colocation Market in Japan 2020 & 2026

Exhibit 368 Data Center Colocation Market in Japan by Investment 2020?2026 (\$ million)

Exhibit 369 Data Center Colocation Market in Japan by Area 2020?2026 (Million Square Feet)

Exhibit 370 Data Center Colocation Market in Japan by Power Capacity 2020?2026 (MW)

Exhibit 371 Data Center Colocation Support Infrastructure Market in Japan 2020?2026 (\$ billion)

Exhibit 372 Data Center Colocation Market in Japan by Colocation Revenue 2020?2026 (\$ billion)

- Exhibit 373 Japan Data Center Colocation Market 2020?2026 (\$ billion)
- Exhibit 374 Snapshot: Colocation Market in Rest of APAC 2020 & 2026
- Exhibit 375 Data Center Colocation Market in Rest of APAC by Investment 2020?2026 (\$ billion)
- Exhibit 376 Data Center Colocation Market in Rest of APAC by Area 2020?2026 (Million Square Feet)
- Exhibit 377 Data Center Colocation Market in Rest of APAC by Power Capacity 2020?2026 (MW)
- Exhibit 378 Data Center Colocation Support Infrastructure Market in Rest of APAC 2020?2026 (\$ billion)
- Exhibit 379 Data Center Colocation Market in Rest of APAC by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 380 Rest of APAC Data Center Colocation Market 2020?2026 (\$ billion)
- Exhibit 281 Middle East Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 282 Middle East Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 283 UAE Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 284 UAE Data Center Colocation Market by Area 2020?2026 (Thousand Square Feet)
- Exhibit 285 UAE Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 286 UAE Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 287 UAE Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 288 UAE Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 289 Saudi Arabia Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 290 Saudi Arabia Data Center Colocation Market by Area 2020?2026 (Thousand Square Feet)
- Exhibit 291 Saudi Arabia Data Center Colocation Market by Power Capacity 2020?2026 (MW)
- Exhibit 292 Saudi Arabia Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)
- Exhibit 293 Saudi Arabia Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 294 Saudi Arabia Data Center Colocation Market by Revenue 2020?2026 (\$ million)
- Exhibit 295 Turkey Data Center Colocation Market by Investment 2020?2026 (\$ million)
- Exhibit 296 Turkey Data Center Colocation Market by Area 2020?2026 (Thousand

Square Feet)

Exhibit 297 Turkey Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 298 Turkey Data Center Colocation Support Infrastructure Market 2020?2026 (\$ million)

Exhibit 299 Turkey Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 300 Turkey Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 301 Other Middle Eastern Countries Data Center Colocation Market by Investment 2020?2026 (\$ million)

Exhibit 302 Other Middle Eastern Countries Data Center Colocation Market by Area 2020?2026 (Thousand Square Feet)

Exhibit 303 Other Middle Eastern Countries Data Center Market by Power Capacity 2020?2026 (MW)

Exhibit 304 Other Middle Eastern Countries Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Exhibit 305 Other Middle Eastern Countries Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 306 Other Middle Eastern Countries Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 307 Incremental Growth in Africa by Investment 2020 & 2026

Exhibit 308 Incremental Growth in Africa by Colocation Revenue 2020 & 2026

Exhibit 309 Incremental Growth in Africa by Area 2020 & 2026

Exhibit 310 Incremental Growth in Africa by Power Capacity 2020 & 2026

Exhibit 311 Incremental Growth in Africa by Support Infrastructure 2020 & 2026

Exhibit 312 Africa Data Center Colocation Market by Investment 2020?2026 (\$ million)

Exhibit 313 Africa Data Center Colocation Market by Area 2020?2026 (thousand square feet)

Exhibit 314 Africa Data Center Colocation Market by Power Capacity 2020?2026 (\$ million)

Exhibit 315 Africa Data Center Colocation Support Infrastructure Market (\$ million)

Exhibit 316 Africa Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 317 Africa Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 318 South Africa Data Center Colocation Market by Investment 2020–2026 (\$ million)

Exhibit 319 South Africa Data Center Colocation Market by Area 2020–2026 (thousand square feet)

Exhibit 320 South Africa Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 321 South Africa Data Center Support Infrastructure Market (\$ million)

Exhibit 322 South Africa Data Center Colocation Market by Revenue 2020?2026 (\$

million)

Exhibit 323 South Africa Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 324 Kenya Data Center Colocation Market by Investment 2020–2026 (\$ million)

Exhibit 325 Kenya Data Center Colocation Market by Area 2020–2026 (thousand square feet)

Exhibit 326 Kenya Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 327 Kenya Data Center Colocation Support Infrastructure Market (\$ million)

Exhibit 328 Kenya Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 329 Kenya Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 330 Other African Countries Data Center Colocation Market by Investment 2020–2026 (\$ million)

Exhibit 331 Other African Countries Data Center Colocation Market by Area 2020–2026 (thousand square feet)

Exhibit 332 Other African Countries Data Center Colocation Market by Power Capacity 2020–2026 (MW)

Exhibit 333 Other African Countries Data Center Support Infrastructure Market 2020–2026 (\$ million)

Exhibit 334 Other African Countries Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 335 Other African Countries Data Center Colocation Market by Revenue 2020?2026 (\$ million)

Exhibit 336 Incremental Growth in APAC by Investment 2020 & 2026

Exhibit 337 Incremental Growth in APAC by Area 2020 & 2026

Exhibit 338 Incremental Growth in APAC by Power Capacity 2020 & 2026

Exhibit 339 Incremental Growth in APAC by Support Infrastructure 2020 & 2026

Exhibit 340 Incremental Growth in APAC by Revenue 2020 & 2026

Exhibit 341 APAC Data Center Colocation Market by Investment 2020?2026 (\$ billion)

Exhibit 342 APAC Data Center Colocation Market Investment by Area 2020?2026 (million square feet)

Exhibit 343 APAC Data Center Colocation Market by Power Capacity 2020?2026 (MW)

Exhibit 344 APAC Data Center Colocation Support Infrastructure Market 2020–2026 (\$ million)

Exhibit 345 APAC Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 346 APAC Data Center Colocation Market by Colocation Revenue 2020?2026 (\$ billion)

Exhibit 347 Snapshot: Colocation Market in China & Hong Kong 2020 & 2026

Exhibit 348 Data Center Colocation Market in China & Hong Kong 2020?2026 (\$ billion)

- Exhibit 349 Data Center Colocation Market in China & Hong Kong by Area 2020?2026 (Million Square Feet)
- Exhibit 350 Data Center Colocation Market in China & Hong Kong by Power Capacity 2020?2026 (MW)
- Exhibit 351 Data Center Colocation Support Infrastructure Market in China & Hong Kong 2020?2026 (\$ billion)
- Exhibit 352 Data Center Colocation Market in China & Hong Kong by Colocation Revenue 2020–2026 (\$ million)
- China & Hong Kong Data Center Colocation Market 2020?2026 (\$ million)
- Exhibit 353 Snapshot: Colocation Market in Australia & New Zealand 2020 & 2026
- Exhibit 354 Data Center Colocation Market in Australia & New Zealand 2020?2026 (\$ billion)
- Exhibit 355 Data Center Colocation Market in Australia & New Zealand by Area 2020?2026 (Million Square Feet)
- Exhibit 356 Data Center Colocation Market in Australia & New Zealand by Power Capacity 2020?2026 (MW)
- Exhibit 357 Data Center Colocation Support Infrastructure Market in Australia & New Zealand 2020?2026 (\$ billion)
- Exhibit 358 Data Center Colocation Market in Australia & New Zealand by Colocation Revenue 2020–2026 (\$ billion)
- Exhibit 359 Australia & New Zealand Data Center Colocation Market 2020?2026 (\$ billion)
- Exhibit 360 Snapshot: Colocation Market in India 2020 & 2026
- Exhibit 361 Data Center Colocation Market in India by Investment 2020?2026 (\$ million)
- Exhibit 362 Data Center Colocation Market in India by Area 2020?2026 (Million Square Feet)
- Exhibit 363 Data Center Colocation Market in India by Power Capacity 2020?2026 (MW)
- Exhibit 364 Data Center Colocation Support Infrastructure Market in India 2020?2026 (\$ billion)
- Exhibit 365 Data Center Colocation Market in India by Revenue 2020–2026 (\$ billion)
- Exhibit 366 India Data Center Colocation Market 2020?2026 (\$ billion)
- Exhibit 367 Snapshot: Colocation Market in Japan 2020 & 2026
- Exhibit 368 Data Center Colocation Market in Japan by Investment 2020?2026 (\$ million)
- Exhibit 369 Data Center Colocation Market in Japan by Area 2020?2026 (Million Square Feet)
- Exhibit 370 Data Center Colocation Market in Japan by Power Capacity 2020?2026 (MW)

- Exhibit 371 Data Center Colocation Support Infrastructure Market in Japan 2020?2026 (\$ billion)
- Exhibit 372 Data Center Colocation Market in Japan by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 373 Japan Data Center Colocation Market 2020?2026 (\$ billion)
- Exhibit 374 Snapshot: Colocation Market in Rest of APAC 2020 & 2026
- Exhibit 375 Data Center Colocation Market in Rest of APAC by Investment 2020?2026 (\$ billion)
- Exhibit 376 Data Center Colocation Market in Rest of APAC by Area 2020?2026 (Million Square Feet)
- Exhibit 377 Data Center Colocation Market in Rest of APAC by Power Capacity 2020?2026 (MW)
- Exhibit 378 Data Center Colocation Support Infrastructure Market in Rest of APAC 2020?2026 (\$ billion)
- Exhibit 379 Data Center Colocation Market in Rest of APAC by Colocation Revenue 2020?2026 (\$ billion)
- Exhibit 380 Rest of APAC Data Center Colocation Market 2020?2026 (\$ billion)
- Exhibit 381 Incremental Growth in Southeast Asia by Investment 2020 & 2026
- Exhibit 382 Incremental Growth in Southeast Asia by Area 2020 & 2026
- Exhibit 383 Incremental Growth in Southeast Asia by Power Capacity 2020 & 2026
- Exhibit 384 Incremental Growth in Southeast Asia by Support Infrastructure 2020 & 2026
- Exhibit 385 Incremental Growth in Southeast Asia by Revenue 2020 & 2026
- Exhibit 386 Data Center Colocation Market in Southeast Asia by Investment 2020?2026 (\$ billion)
- Exhibit 387 Data Center Colocation Market in Southeast Asia by Area 2020?2026 (Million Square Feet)
- Exhibit 388 Data Center Colocation Market in Southeast Asia by Power Capacity 2020?2026 (MW)
- Exhibit 389 Data Center Colocation Support Infrastructure Market in Southeast Asia 2020–2026 (\$ million)
- Exhibit 390 Data Center Colocation Market in Southeast Asia by Colocation Revenue 2020?2026 (\$ million)
- Exhibit 391 Southeast Asia Data Center Colocation Market 2020?2026 (\$ million)
- Exhibit 392 Snapshot ? Data Center Colocation Market in Singapore 2020 & 2026
- Exhibit 393 Data Center Colocation Market in Singapore by Investment 2020?2026 (\$ billion)
- Exhibit 394 Data Center Colocation Market in Singapore by Area 2020?2026 (million square feet)

Exhibit 395 Data Center Colocation Market in Singapore by Power Capacity 2020?2026 (MW)

Exhibit 396 Data Center Colocation Support Infrastructure Market in Singapore 2020?2026 (\$ million)

Exhibit 397 Data Center Colocation Market in Singapore by Colocation Revenue 2020?2026 (\$ million)

Exhibit 398 Singapore Data Center Colocation Market 2020?2026 (\$ million)

Exhibit 399 Snapshot ? Data Center Colocation Market in Indonesia 2020 & 2026

Exhibit 400 Data Center Colocation Market in Indonesia by Investment 2020?2026 (\$ billion)

Exhibit 401 Data Center Colocation Market in Indonesia by Area 2020?2026 (million square feet)

Exhibit 402 Data Center Colocation Market in Indonesia by Power Capacity 2020?2026 (MW)

Exhibit 403 Data Center Colocation Support Infrastructure Market in Indonesia 2020?2026 (\$ million)

Exhibit 404 Data Center Colocation Market in Indonesia by Colocation Revenue 2020?2026 (\$ million)

Exhibit 405 Indonesia Data Center Colocation Market 2020?2026 (\$ million)

Exhibit 406 Snapshot ? Data Center Colocation Market in Malaysia 2020 & 2026

Exhibit 407 Data Center Colocation Market in Malaysia by Investment 2020?2026 (\$ billion)

Exhibit 408 Data Center Colocation Market in Malaysia by Area 2020?2026 (million square feet)

Exhibit 409 Data Center Colocation Market in Malaysia by Power Capacity 2020?2026 (MW)

Exhibit 410 Data Center Colocation Support Infrastructure Market in Malaysia 2020?2026 (\$ million)

Exhibit 411 Data Center Colocation Market in Malaysia by Colocation Revenue 2020?2026 (\$ million)

Exhibit 412 Malaysia Data Center Colocation Market 2020?2026 (\$ million)

Exhibit 413 Snapshot ? Data Center Colocation Market in Thailand 2020 & 2026

Exhibit 414 Data Center Colocation Market in Thailand by Investment 2020?2026 (\$ million)

Exhibit 415 Data Center Colocation Market in Thailand by Area 2020?2026 (million square feet)

Exhibit 416 Data Center Colocation Market in Thailand by Power Capacity 2020?2026 (MW)

Exhibit 417 Data Center Colocation Support Infrastructure Market in Thailand

2020?2026 (\$ million)

Exhibit 418 Data Center Colocation Market in Thailand by Colocation Revenue

2020?2026 (\$ million)

Exhibit 419 Thailand Data Center Colocation Market 2020?2026 (\$ million)

Exhibit 420 Snapshot ? Data Center Colocation Market in Other Southeast Asian Countries 2020 & 2026

Exhibit 421 Data Center Colocation Market in Other Southeast Asian Countries by Investment 2020?2026 (\$ billion)

Exhibit 422 Data Center Colocation Market in Other Southeast Asian Countries by Area 2020?2026 (million square feet)

Exhibit 423 Data Center Colocation Market in Other Southeast Asian Countries by Power Capacity 2020?2026 (MW)

Exhibit 424 Data Center Colocation Support Infrastructure Market in Other Southeast Asian Countries 2020?2026 (\$ million)

Exhibit 425 Data Center Colocation Market in Other Southeast Asian Countries by Colocation Revenue 2020?2026 (\$ million)

Exhibit 426 Other Southeast Asian Countries Data Center Colocation Market 2020?2026 (\$ million)

Exhibit 427 Vendor Market Share by Colocation Investment (2020)

Exhibit 428 Vendor Market Share by Colocation Area (2020)

Exhibit 429 Vendor Market Share by Colocation Power Capacity (2020)

Exhibit 430 Vendor Market Share by Colocation Revenue (2020)

List Of Tables

LIST OF TABLES

Table 1 Key Caveats

Table 2 Currency Conversion 2013?2020

Table 3 Upcoming Data Center Colocation Projects in Canada

Table 4 Global Data Center Colocation Market 2020?2026

Table 5 Global Data Center Colocation Market by Services Type 2020?2026 (\$ billion)

Table 6 Global Data Center Colocation Infrastructure Market 2020?2026 (\$ billion)

Table 7 Global Data Center Colocation Electrical Infrastructure Market 2020?2026 (\$ billion)

Table 8 Global Data Center Colocation Mechanical Infrastructure Market 2020?2026 (\$ billion)

Table 9 Global Data Center Colocation Cooling Systems Market 2020?2026 (\$ billion)

Table 10 Global Data Center Colocation General Construction Market 2020?2026 (\$ billion)

Table 11 Global Data Center Colocation Market by Tier Standards 2020?2026 (\$ billion)

Table 12 Global Data Center Colocation Market Investment by Region 2020?2026 (\$ billion)

Table 13 Global Data Center Colocation Market Area by Region 2020?2026 (Million Square Feet)

Table 14 Global Data Center Colocation Market Power Capacity by Region 2020?2026 (MW)

Table 15 Global Data Center Colocation Market Revenue by Region 2020?2026 (\$ billion)

Table 16 North America Data Center Colocation Market 2020?2026

Table 17 North America Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 18 North America Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 19 US Data Center Colocation Market 2020?2026

Table 20 US Data Center Colocation Market by Services Type 2020?2026 (\$ billion)

Table 21 US Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)

Table 22 Canada Data Center Colocation Market 2020?2026

Table 23 Canada Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 24 Canada Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 25 Latin America Data Center Colocation Market 2020?2026

Table 26 Latin America Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 27 Latin America Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 28 Brazil Data Center Colocation Market 2020?2026

Table 29 Brazil Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 30 Brazil Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 31 Other Latin America Countries Data Center Colocation Market 2020?2026

Table 32 Other Latin America Countries Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 33 Other Latin America Countries Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 34 Western Europe Data Center Colocation Market 2020?2026

Table 35 Western Europe Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)

Table 36 Western Europe Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)

Table 37 UK Data Center Colocation Market 2020?2026

Table 38 UK Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)

Table 39 UK Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)

Table 40 Germany Data Center Colocation Market 2020?2026

Table 41 Germany Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)

Table 42 Germany Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)

Table 43 Netherlands Data Center Colocation Market 2020?2026

Table 44 Netherlands Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)

Table 45 Netherlands Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)

Table 46 France Data Center Colocation Market 2020?2026

Table 47 France Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)

Table 48 France Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)

Table 49 Ireland Data Center Colocation Market 2020?2026

Table 50 Ireland Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)

Table 51 Ireland Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)

Table 52 Switzerland Data Center Colocation Market 2020?2026

Table 53 Switzerland Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)

- Table 54 Switzerland Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)
- Table 55 Italy Data Center Colocation Market 2020?2026
- Table 56 Italy Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)
- Table 57 Italy Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)
- Table 58 Spain Data Center Colocation Market 2020?2026
- Table 59 Spain Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)
- Table 60 Spain Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)
- Table 61 Other Western European Countries Data Center Colocation Market 2020?2026
- Table 62 Other Western European Countries Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)
- Table 63 Other Western European Countries Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)
- Table 64 Nordic Data Center Colocation Market 2020?2026
- Table 65 Nordic Region Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)
- Table 66 Nordic Region Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)
- Table 67 Denmark Data Center Colocation Market 2020?2026
- Table 68 Denmark Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)
- Table 69 Denmark Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)
- Table 70 Sweden Data Center Colocation Market 2020?2026
- Table 71 Sweden Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)
- Table 72 Sweden Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)
- Table 73 Norway Data Center Colocation Market 2020?2026
- Table 74 Norway Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)
- Table 75 Norway Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)
- Table 76 Finland & Iceland Data Center Colocation Market 2020?2026
- Table 77 Finland & Iceland Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)
- Table 78 Finland & Iceland Data Center Colocation Market by Colocation Services

2020?2026 (\$ billion)

Table 79 Central & Eastern Europe Data Center Colocation Market 2020?2026

Table 80 CEE Data Center Colocation Market by Infrastructure 2020?2026 (\$ million)

Table 81 CEE Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)

Table 82 Russia & Czech Republic Data Center Colocation Market 2020?2026

Table 83 Russia & Czech Republic Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 84 Russia & Czech Republic Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)

Table 85 Poland & Austria Data Center Colocation Market 2020?2026

Table 86 Poland & Austria Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 87 Poland & Austria Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)

Table 88 Other Central & Eastern European Countries Data Center Colocation Market 2020?2026

Table 89 Other Central & Eastern European Countries Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 90 Other Central & Eastern European Countries Data Center Colocation Market by Colocation Services 2020?2026 (\$ billion)

Table 91 Middle East Data Center Colocation Market 2020?2026

Table 92 Middle East Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 93 Middle East Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 94 UAE Data Center Colocation Market 2020?2026

Table 95 UAE Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 96 UAE Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 97 Saudi Arabia Data Center Colocation Market 2020?2026

Table 98 Saudi Arabia Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 99 Saudi Arabia Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 100 Turkey Data Center Colocation Market 2020?2026

Table 101 Turkey Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 102 Turkey Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 103 Other Middle Eastern Countries Data Center Colocation Market 2020?2026

Table 104 Other Middle Eastern Countries Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 105 Central & Eastern Europe Data Center Colocation Services Market

2020?2026 (\$ billion)

Table 106 Africa Data Center Colocation Market 2020?2026

Table 107 Africa Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 108 Africa Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 109 South Africa Data Center Colocation Market 2020?2026

Table 110 South Africa Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 111 South Africa Data Center Colocation Services Market 2020?2026 (\$ million)

Table 112 Kenya Data Center Colocation Market 2020?2026

Table 113 Kenya Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 114 Kenya Data Center Colocation Services Market 2020?2026 (\$ million)

Table 115 Other African Countries Data Center Colocation Market 2020?2026

Table 116 Other African Countries Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 117 Other African Countries Data Center Colocation Services Market 2020?2026 (\$ million)

Table 118 APAC Data Center Colocation Market 2020?2026

Table 119 APAC Data Center Colocation Infrastructure Market 2020?2026 (\$ million)

Table 120 APAC Data Center Colocation Services Market 2020?2026 (\$ billion)

Table 121 Data Center Colocation Market in China & Hong Kong 2020?2026

Table 122 Data Center Colocation Infrastructure Market in China & Hong Kong 2020?2026 (\$ billion)

Table 123 Data Center Colocation Services Market in China & Hong Kong 2020?2026 (\$ billion)

Table 124 Data Center Colocation Market in Australia & New Zealand 2020?2026

Table 125 Data Center Colocation Infrastructure Market in Australia & New Zealand 2020?2026 (\$ billion)

Table 126 Data Center Colocation Services Market in Australia & New Zealand 2020?2026 (\$ billion)

Table 127 Data Center Colocation Market in India 2020?2026

Table 128 Data Center Colocation Infrastructure Market in India 2020?2026 (\$ billion)

Table 129 Data Center Colocation Services Market in India 2020?2026 (\$ billion)

Table 130 Data Center Colocation Market in Japan 2020?2026

Table 131 Data Center Colocation Infrastructure Market in Japan 2020?2026 (\$ billion)

Table 132 Data Center Colocation Services Market in Japan 2020?2026 (\$ billion)

Table 133 Data Center Colocation Market in Rest of APAC 2020?2026

Table 134 Data Center Colocation Infrastructure Market in Rest of APAC 2020?2026 (\$ billion)

Table 135 Data Center Colocation Services Market in Rest of APAC 2020?2026 (\$

billion)

Table 136 Data Center Colocation Market in Southeast Asia 2020?2026

Table 137 Data Center Colocation Infrastructure Market in Southeast Asia 2020?2026
(\$ billion)

Table 138 Data Center Colocation Services Market in Southeast Asia 2020?2026 (\$
billion)

Table 139 Data Center Colocation Market in Singapore 2020?2026

Table 140 Data Center Colocation Infrastructure Market in Singapore 2020?2026 (\$
billion)

Table 141 Data Center Colocation Services Market in Singapore 2020?2026 (\$ billion)

Table 142 Data Center Colocation Market in Indonesia 2020?2026

Table 143 Data Center Colocation Infrastructure Market in Indonesia 2020?2026 (\$
million)

Table 144 Data Center Colocation Services Market in Indonesia 2020?2026 (\$ billion)

Table 145 Data Center Colocation Market in Malaysia 2020?2026

Table 146 Data Center Colocation Infrastructure Market in Malaysia 2020?2026 (\$
million)

Table 147 Data Center Colocation Services Market in Malaysia 2020?2026 (\$ billion)

Table 148 Data Center Colocation Market in Thailand 2020?2026

Table 149 Data Center Colocation Infrastructure Market in Thailand 2020?2026 (\$
million)

Table 150 Data Center Colocation Services Market in Thailand 2020?2026 (\$ billion)

Table 151 Data Center Colocation Market in Other Southeast Asian Countries
2020?2026

Table 152 Data Center Colocation Infrastructure Market in Other Southeast Asian
Countries 2020?2026 (\$ billion)

Table 153 Data Center Colocation Services Market in Other Southeast Asian Countries
2020?2026 (\$ billion)

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