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# Data Center Colocation Market in EMEA - Industry Outlook and Forecast 2020-2025

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## Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this EMEA Data Center Colocation market report

The EMEA data center colocation market by revenue is expected to grow at a CAGR of close to 8% during the period 2019–2025.

The EMEA data center market is witnessing a significant boost in investment because of the implementation of the GDPR in Europe and the increase in demand for colocation services due to the high adoption of internet-based services among businesses in the Middle East and Africa region. The adoption of cloud-based services has increased as organizations in the region are working from remote locations due to the outbreak of the COVID pandemic. This increase in adoption will lead to a rise in the demand and development of colocation data centers in the region. Colocation service providers will continue to build both retail and wholesale colocation spaces in the region with higher connectivity and availability of power sources.

Colocation providers continue to drive market revenue during the forecast period. The market will also witness the entry of new providers, especially in Western Europe. Also, new colocation service providers are likely to enter in the Middle East and African countries to capture new markets. The market witnessed significant M&A activities in 2019 due to the rise in demand in several businesses, leading data center service providers to sign M&A contracts to expand their portfolio.

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

Increased Popularity of District Heating Concept

High Adoption of Renewable Energy among Service Providers

M&A Activities improving Colocation Market Share

Increased Demand for Edge Data Centers

The study considers the present scenario of the EMEA data center colocation market and its market dynamics for the period 2019?2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspect of the market. It profiles and examines leading companies and other prominent ones operating in the market.

EMEA Data Center Colocation Market Segmentation

This research report includes a detailed segmentation by electrical infrastructure, mechanical infrastructure, general construction, service type, and geography. The UK, Germany, the Netherlands, France, and Ireland are major contributors to the power infrastructure revenue. Several facilities have adopted flexible designs in Western Europe to facilitate dual power feeds, 2N redundant UPS and PDU systems, and N+1 generator. Colocation investments are likely to push the demand for 500–1,000 kVA UPS systems and >1,000 kVA systems. Generators with >2 MW power capacity are prefeed in the region. Most facilities in the Nordic region are powered through renewable energy with grid stability of over 95%. This reduces the dependence on generator systems, leading to the installation of 2N UPS systems. The use of basic PDUs is comparatively lower, with higher procurement of metered and monitored PDU systems.

Favorable climatic conditions and the availability of renewable resources such as wind energy in the UK have helped data center operators to benefit from free cooling. Most of the data centers built in Germany are adopting free cooling to cool the facility. A major vendor uses redundant water and air-cooled system supported by free cooling with N+1 redundancy and CRAH units with N+1 configuration. Most of the data centers in the Nordic region are cooled through free cooling techniques. The Nordic data center market facilitates free cooling for over 8,400 hours in a year. The use of free cooling systems will continue to add revenue to the market during the forecast period. All the countries in the Central and Eastern European regions support free cooling of the data center for over 6,000 hours a year. Many data centers have been equipped with in-direct evaporative/adiabatic coolers. Few facilities have also adopted water/glycol-based cooling systems along with highly efficient DX-based CRAC systems to cool the facility.

Western Europe is the most active market across the European region for data center construction. Many facilities are being designed and built to cover an area of over 100,000 square feet. The increase in demand for data centers has been a revenue opportunity for multiple contractors and sub-contractors in the market. However, the major challenge for several contractors in the region is the non-availability of skilled professionals to manage multiple data center projects.

Retail colocation services in EMEA are expected to reach over $9.5 billion by 2025. The market is likely to be driven by the increased demand for colocation services from organizations in developing countries. Also, enterprises with the need for geographically distributed capacity and limited budgets are likely to opt for retail colocation. Several existing retail colocation service users are expected to opt for wholesale colocation capacities during the forecast period. The retail colocation market is also likely to face a strong challenge from cloud-based hosting services, especially in the Middle East and Africa region.

Segmentation by Electrical Infrastructure

- UPS Systems
- Generators
- Transfer Switches & Switchgears
- PDUs
- Other Electrical Infrastructure

By Mechanical Infrastructure

- Cooling Systems
  - CRAC & CRAH Units

Chiller Units

Cooling Towers & Dry Coolers

Economizers & Evaporative Coolers

Other Units

Racks

Other Mechanical Infrastructure

Cooling Technique

Air-based

Water-based

By General Construction

Building Development

Installation & Commissioning Services

Building Designs

Physical Security

DCIM/BMS

By Service Type

Retail

Wholesale

Insights by Geography

In Europe, the UK, Germany, and the Netherlands dominate the market in colocation investments. Western Europe is witnessing colocation investment contributions from both global and local colocation service providers. The GDPR implementation has driven the demand for data center development among colocation providers in Europe. The market will also witness the continuous adoption of cloud services among SMEs, with the increased interest shown towards the digital transformation of businesses by adopting solutions such as IoT, big data, and artificial intelligence. The Middle East and Africa market is witnessing investments in the colocation data center of over 5 MW. Few providers such as Khazna Data Ceter, Teraco Data Environments, and Africa Data Centers (Liquid Telecommunications) are investing in hyperscale data center capacity.

By Geography

- Western Europe
  - UK
  - Germany
  - Netherlands
  - France
  - Ireland
  - Other Western Europe Countries
- Nordic
  - Denmark
  - Norway
  - Sweden
  - Finland & Iceland

Central and Eastern Europe

Russia & Czech Republic

Poland & Austria

Other Countries

Middle East

GCC

Other Middle Eastern Countries

Africa

South Africa

Other African Countries

Insights by Vendors

In terms of revenue, Equinix is the leading player in the EMEA market with a market share of about over 15% in 2019, followed by Digital Realty (Interxion) and NTT Global Data Center. Over the last two years, the market has witnessed the entry of several new entrants. These new entrants will provide intense competition to the growth of revenue. The market is likely to witness several mergers and acquisitions, leading to an increase in the market share of existing providers. In terms of colocation revenue, Western Europe dominates the market, with around 70% of the revenue share. In Western Europe, the UK is the leading revenue contributor due to the presence of Equinix, Interxion & Digital Realty, STT GDC (VIRTUS Data Centre), LDeX Group, Global Switch, Telehouse, Colt DCS, CyrusOne, and Next Generation Data (Vantage Data Centre).

Prominent Colocation Service Vendors

Colt Data Center Services (Colt DCS)

Digital Realty

Equinix

Global Switch

Interxion

VIRTUS Data Center

NTT Communications or NTT Global Data Center

Teraco Data Environments

Data Center Investors

3Data

Aruba SPA

ATM Data Center (ATM S.A.)

Bahnhof

Batelco (Bahrain Telecommunications Company)

Bezeq International

Bulk Infrastructure

CyrusOne

Digiplex

EdgeConnex

Etisalat Group

Euclyde

Fortlax

GlobalConnect

Green Datacenter

Gulf Data Hub

Icolo.io

Hydro66

Iron Mountain (IO)

Inwi

IXcellerate

Keppel DC

Khanza

LDeX Group

Liquid Telecommunication

LuxConnect

N+ONE

Mobily

Ooredoo

Scaleway Data Center

Tieto

T-Systems

Verne Global

VNET

Turkcell

New Entrants

Echelon Data Centers

Business Overview

Product Offerings

Global Technical Realty

NDC Data Center

Quality Technology Services (QTS)

Raxio Data Center

Vantage Data Center

Key Questions Answered:

What is the EMEA data center colocation market size and growth rate during the forecast period?
What are the factors influencing the growth of EMEA colocation market?
What is the growth of retail colocation services market?
Which regions are the major revenue contributors to the EMEA colocation market?
Who are the leading players in the market, and what is their market share?

## Contents

## 8 MARKET OPPORTUNITIES & TRENDS



## 9 MARKET GROWTH ENABLERS



## 10 MARKET RESTRAINTS



## 11 MARKET LANDSCAPE

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**15 MECHANICAL INFRASTRUCTURE**



**16 COOLING SYSTEMS**

## 22 NORDIC REGION

**24 MIDDLE EAST**

## 28 PROMINENT DATA CENTER INVESTORS

## 29 NEW MARKET ENTRANTS



## 30 REPORT SUMMARY



## 31 QUANTITATIVE SUMMARY

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# List Of Exhibits

## LIST OF EXHIBITS

(Mw)
Exhibit 111 Data Center Colocation Support Infrastructure Market In France 2019?2025 ($ Million)
Exhibit 112 Data Center Colocation Market In France By Colocation Revenue 2019–2025 ($ Million)
Exhibit 113 Data Center Retail & Wholesale Colocation Market In France 2019–2025 ($ Million)
Exhibit 114 Snapshot – Data Center Colocation Market In Ireland 2019?2025
Exhibit 115 Data Center Colocation Market In Ireland 2019?2025 ($ Million)
Exhibit 116 Data Center Colocation Market In Ireland By Area 2019?2025 (Million Square Feet)
Exhibit 117 Data Center Market In Ireland By Power Capacity 2019?2025 (Mw)
Exhibit 118 Data Center Colocation Support Infrastructure Market In Ireland 2019?2025 ($ Million)
Exhibit 119 Data Center Colocation Market In Ireland By Colocation Revenue 2019–2025 ($ Million)
Exhibit 120 Data Center Retail & Wholesale Colocation Market In Ireland 2019–2025 ($ Million)
Exhibit 121 Snapshot – Data Center Colocation Market In Other We Countries 2019?2025
Exhibit 122 Data Center Colocation Market In Other We Nations 2019?2025 ($ Million)
Exhibit 123 Data Center Colocation Market In Other We Countries By Area 2019?2025 (Million Square Feet)
Exhibit 124 Data Center Colocation Market In Other We Countries By Power Capacity 2019?2025 (Mw)
Exhibit 125 Data Center Colocation Support Infrastructure Market In Other We Countries 2019?2025 ($ Million)
Exhibit 126 Data Center Colocation Market In Other We Countries By Colocation Revenue 2019?2025 ($ Million)
Exhibit 127 Data Center Retail & Wholesale Colocation Market In Other We Countries 2019?2025 ($ Million)
Exhibit 128 Incremental Growth In Nordics By Investment 2019?2025 ($ Billion)
Exhibit 129 Incremental Growth In Nordics By Revenue 2019?2025 ($ Billion)
Exhibit 130 Incremental Growth In Nordics By Investment 2019?2025 ($ Million)
Exhibit 131 Incremental Growth In Nordics By Area 2019?2025 (Million Square Feet)
Exhibit 132 Incremental Growth In Nordics By Power Capacity 2019?2025 (Mw)
Exhibit 133 Data Center Colocation Market In Nordics 2019–2025 ($ Million)
Exhibit 134 Data Center Colocation Market In Nordics By Area 2019–2025 (Million Square Feet)

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## List Of Tables

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