

# Data Center Construction Market in Europe - Industry Outlook and Forecast 2019-2024

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## Abstracts

Europe data center construction market is expected to reach around \$13 billion by 2024, growing at a CAGR of over 4% during 2018–2024.

The increased procurement of renewable energy sources for data centers operations, the rise in data center automation, and the emergence of Lithium-ion batteries and fuel cells are expected to drive the Europe data center construction market. Ericsson, Deutsche Telekom, Telia Sonera, Telenor, and Tele2 TDC Group along with government agencies are investing a high capital in improving internet connectivity in Western Europe and the Nordic region. The Europe data center construction market is expected to grow due to increased investments from colocation, cloud, internet, and telecommunication service providers. Further, growth in data, general data protection regulation (GDPR), the popularity of social media, high adoption of smart wearable devices, and the rise of connected reality will be significant growth drivers for Europe data center construction market.

This market research report on the Europe data center construction market covers market sizing and forecast, market share, industry trends, growth drivers, and vendor analysis. The market study includes insights on segmentation by electrical infrastructure (UPS Systems, generators, transfer switches and switchgears, rack PDUs, and other electrical infrastructure), mechanical infrastructure (cooling systems, racks, and other infrastructure), tier standards (Tier I&II, Tier III, and Tier IV), general construction (building development, installation and commissioning services, building design, physical security, DCIM (datacenter infrastructure management software), and countries (Western Europe: Netherlands, UK, Germany, and France), (Central and Eastern Europe: Russia and Czech Republic, Poland and Austria, and other countries), and Nordic region (Denmark, Finland, Sweden, Iceland, and Norway).

The report considers the present scenario of the Europe data center construction market and its market dynamics for the period 2019-2024. It covers a detailed overview of several growth enablers, restraints, and trends in the Europe data center construction market. The study includes both the demand and supply aspect of the data center construction market. It profiles and analysis leading infrastructure vendors, data center construction contractors, and data center service providers.

### Europe Data Center Construction Market: Dynamics

Europe is one of the leading active data center markets, which is expected to grow at a CAGR of 16% during the forecast period. According to the Global Interconnection Index by Equinix Frankfurt, about 70% of the data traffic is concentrated in Germany, France, Italy, Spain, and the UK. London is expected to be the largest interconnection market. Hyperscale service providers are actively investing in the Europe data center construction market. For example, Microsoft is expected to open its cloud region in Germany by the end of 2019 or early 2020. The investment in data center technology, especially edge computing facilities, is expected to grow in several facilities after 2020 in the European region. EdgeConnex is among the leading-edge datacenter operator that is likely to increase its presence in the European market with operations in Amsterdam, Dublin, Munich, and Warsaw. The augmenting numbers of connected devices are expected to triple by the end of the forecast period, and the investment on edge computing facilities will grow post-2020 in the region. EdgeConnex and other colocation service providers have also planned to establish facilities in the Europe data center construction market.

### Europe Data Center Construction Market: Segmentation

This market research report includes a detailed segmentation of the market by electrical infrastructure, mechanical infrastructure, tier standards, general construction, and countries.

The Europe data center construction market by electrical infrastructure can be classified into UPS systems, generators, transfer switches and switchgears, rack PDUs, and others (utility transformers, power cables and panels, lighting equipment, installation services, busbars, circuit breakers, and TVSS systems). The UPS systems and generators segments account for significant market shares and are expected to grow at CAGRs of approximately 5% and 4%, respectively, during 2018-2024. In 2019, western Europe is likely to witness the opening of over 20 data center projects with the power

capacity of more than 10 MW. The European data center market is adopting pre-fabricated datacenters, which will add more revenue for less than 1 W UPS systems.

The Europe data center construction market by mechanical infrastructure can be classified into cooling systems, racks, and others. The cooling systems segment has captured a major portion of the European market and is expected to grow at a CAGR of over 4% during 2018–2024. Computer room air conditioners (CRAC), computer room air handlers (CRAH), chillers, cooling towers, and dry coolers are the commonly adopted cooling infrastructure in the Europe data center construction market. The use of indirect evaporative cooler and air/water-side economizers will continue to grow in Nordic countries and Northern Western Europe, facilitating free cooling for a minimum of 8,000 hours per year.

The Europe data center construction market by tier standards can be divided into Tier I&II, Tier III, and Tier IV. Tier IV data center facilities are the fastest growing segment in the Europe data center construction market and are expected to grow at a CAGR of approximately 6% during 2018–2024. The Uptime Institute has developed a Tier Classification System (tier I?4), which evaluates datacenter facilities based on their infrastructure performance, efficiency, redundancy, and high availability. In 2017, Switch, a leading data center developer and operator, designed a tier V data center, which covers the entire data center design and development, including the use of renewable energy sources as a classification parameter.

Building development and designing, installation and commissioning services, physical security, and DCIM (data center infrastructure management software) are major constituents of the general construction segment. Building development and installation and commissioning services are the fastest growing segments and are expected to grow at a CAGR of around 3% and 5%, respectively. While increased hyperscale investments by companies such as AWS, Google, Facebook, Apple, and Microsoft will increase a high demand for skilled workforce in several European countries, including Denmark, Ireland, Germany, etc., the data center market in Western Europe will witness an increase in facility designs that support OCP infrastructure operations.

## Market Segmentation by Electrical Infrastructure

UPS Systems

Generators

Transfer Switches and Switchgears

Rack PDUs

Others

## Market Segmentation by Mechanical Infrastructure

Cooling Systems

Racks

Others

## Market Segmentation by Tier Standards

Tier I & II

Tier III

Tier IV

## Market Segmentation by General Construction

Building Development

Installation and Commissioning Services

Building Design

Physical Security Systems

DCIM (Data Center Infrastructure Management Software)

## Europe Data Center Construction Market: Geography

Western Europe (Netherlands, UK, Germany, France), Central and Eastern Europe (Russia and the Czech Republic, Poland and Austria, and other countries, and the Nordic region (Denmark, Finland, Sweden, Iceland, and Norway) are the major contributors to the Europe data center construction market. The UK and the Netherlands are expanding significantly, and the market in the UK is expected to grow at a CAGR of 2% during 2018–2024. Several global cloud service players such as AWS, Microsoft, and Google and many colocation service providers such as Equinix, Digital Realty, CyrusOne, and Colt DCS are expanding their presence in the UK, which is likely to increase the market growth. The implementation of cloud-based and big data services will be a strong growth enabler for the UK data center market, thereby fueling additional investments during the forecast period.

### Market Segmentation by Geography

#### Western Europe

Netherlands

UK

Germany

France

#### Central and Eastern Europe

Russia and the Czech Republic

Poland and Austria

other countries

#### Nordic

Denmark

Finland

Sweden

Iceland

Norway

### Key Vendor Analysis

Multiple initiatives by hyperscale service providers to reduce the cost of efficient infrastructure services are expected to aid the growth of the Europe data center construction market. Infrastructure resellers and distributors are expected to compete with each other in the region. The demand for cloud data service and high-density operations is expected to grow during the forecast period. Partnerships with local and modular data center service providers will increase revenues for global vendors operating in the market. The need for installation, commissioning, and maintenance services will generate local job opportunities in the market.

### Prominent Construction Contractors

AECOM

Arup Group

Bruce Shaw

Cap Ingelec

DPR Construction

Etix Everywhere

Flex Enclosure

Future-tech

Jones Engineering

KMCS

LUPP Group

Mace group

Mercury engineering

NCC

Red Engineering

Skanska

SISK Group

Structure Tone

#### Prominent Infrastructure Providers

ABB

Bosch Security

Caterpillar

Cummins

Eaton

EURO-DIESEL

Hitec Power Protection

KOHLER

Legrand Group

MTU OnSite Energy

Nlyte Software

Piller Power Systems

Riello UPS

Rittal

Schneider Electric

Socomec Group

STULZ

Vertiv

#### Prominent Data Center Investors

Adgar

Advania Data Center

Apple

Aruba

AWS

Colt Data Centre Services (Colt DCS)

CyrusOne

Digital Realty

Equinix

Facebook



Google

Global Switch

Iliad Data Center

Interxion

IXcellerate

Microsoft

NTT Communications

OVH

STT GDC

T-Systems

T5 Data Centers

## Key Market Insights

1. An analysis of the Europe data center construction market in terms of market sizing and growth opportunities for the forecast period 2019?2024
2. Comprehensive insights on current industry trends, market forecast, and growth drivers in the Europe data center construction market
3. Discussion on growth drivers, challenges, and investment opportunities
4. A complete overview of market segments and the regional outlook of the Europe data center construction market
5. A detailed outline of the vendor landscape, competitive analysis, and key market strategies for gaining a competitive advantage in the Europe data center construction market

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