

Data Center Market in Europe - Industry Outlook and Forecast 2021-2026

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Abstracts

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

The Europe data center market by investment is expected to grow at a CAGR of over 4% during the period 2021–2026.

The market is expected to grow due to the growing procurement of renewable energy sources. Over 25 European cloud and data center operators, including AWS, Google, Equinix, Interxion, OVH Cloud, Scaleway, Aruba, and 17 other industry associations have signed an agreement to make their facilities carbon neutral via 100% renewable energy sources by 2030. According to the Climate Neutral Data Centre Pact, 75% of the power supplied to data centers in Europe will be supplied through renewable energy or carbon-free energy by December 31, 2025, and the objective is to reach 100% by December 31, 2030. This announcement is likely to offer a high impetus to the growth of the data center market in Europe. Hyperscale data center providers are the major investors in renewable energy initiatives. Germany intends renewable resources to constitute at least 35% of the gross electricity consumption. Ireland aimed to generate 16% of its energy through renewable energy sources in 2020, which is expected to reach 55% by 2030. Norway is the leading country in the production of renewable energy sources, followed by Sweden and Finland. Iceland continues to produce 100% of electricity through renewable sources.

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

Procurement of Renewable Energy Sources

Introduction of Innovative UPS Battery Technology

Adoption of District Heating by Data Centers

Cloud Adoption driving Data Center Market

The study considers the present scenario of the Europe data center market and its market dynamics for the period 2020-2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Europe Data Center Market Segmentation

The Europe data center market research report includes a detailed segmentation by IT infrastructure, electrical infrastructure, mechanical infrastructure, cooling technique, general construction, tier standards, geography. Enterprises are shifting to high-performance and capacity-intensive infrastructure. The high consumption of internet-based services is expected to drive the IT infrastructure market. The COVID-19 pandemic fueled infrastructure adoption among internet-related service providers in Q1 and Q2 2020. Hyperscale operators procured ODM infrastructure, which grew by over 10% across Europe in 2020. UPS systems are the highest contributors to market investment. In 2020, the adoption of lithium-ion UPS systems grew considerably. Most data centers operating in Europe are adopting N+N redundant infrastructure. The adoption of generator systems with a capacity of over 2 MW is high due to the increased construction of large and hyperscale facilities. Data center operators have adopted innovative and energy-efficient cooling infrastructure solutions, aiming to reduce power consumption by up to 50%. This is expected to grow during the forecast period as market vendors are introducing innovative high-efficient cooling systems.

The server infrastructure market has witnessed strong growth over the last two years. Server systems based on x86 architecture dominated the Europe data center market share with over 85% in 2020. Most modern operators adopt the server infrastructure that matches workload requirements. The demand for servers suitable for cloud environments is likely to grow during the forecast period. In 2020, the increased adoption of all-flash storage arrays along with sizable contribution from hybrid storage arrays is expected to aid storage systems. The growth of flash storage systems is

boosted by high-performance operations that require strong input/output capabilities. The increase in bandwidth requirements, data center consolidation, and virtualization are some major factors driving the demand for ethernet port switches, controllers, and adaptors. 25/50 GbE switches are likely to experience considerable growth during the forecast period.

Several facilities have adopted flexible designs to facilitate the installation of dual power feeds, 2N redundant UPS and PDU systems, and N+1 generators. The market share of metered and monitored rack PDU solutions has observed a remarkable increase in Western Europe. In the Nordic region, the deployment of hyperscale facilities is likely to fuel the procurement of 48V DC UPS systems. Most facilities in the region are powered by renewable energy with grid stability of over 95%. This reduces the number of redundant generator systems, encouraging 2N UPS system installation. A majority of data centers in central and eastern Europe are designed as Tier III standards with a minimum of N+1 redundancy in UPS and generator systems. The use of renewable energy sources to power data centers is low in the region. However, their utilization is expected to grow during the forecast period.

Several data centers in Western Europe support free cooling systems, which include adiabatic coolers, evaporative coolers, and free cooling chiller systems. The use of water-based cooling techniques includes water-treatment plants and systems. Most data center operators procure 45U–52U rack cabinets. However, the procurement of 42U racks is declining in the Europe data center market.

Western Europe is the most active market for data center construction across the European region. The increase in demand for cloud computing and other related services has offered several revenue opportunities for multiple and sub-contractors in the market. Many facilities are being designed and built to cover an area of over 100,000 square feet. Several major data center construction in the region is managed by Europe-based construction service providers. However, the non-availability of a skilled workforce to manage multiple hyperscale projects is the major challenge for several contractors in the region.

According to the Uptime Institute, Europe has around 217 certified data centers spread over 29 countries, which include local and global facilities. A majority of them are in the UK, Russia, Spain, Lithuania, Luxembourg, Italy, and France. Europe has higher Tier III certified facilities than Tier IV and Tier II. Around 163 facilities in Europe are Tier III certified. Russia, the UK, Spain, Italy, and Lithuania have the highest number of certified data centers.

By IT Infrastructure

Servers

Storage

Network

By Electrical Infrastructure

UPS Systems

Generators

Transfer Switches and Switchgears

PDU's

Other Electrical Infrastructures

By Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chiller Units

Cooling Towers, Dry Coolers, & Condensers

Economizers & Evaporative Coolers

Other Cooling Units

Racks

Others Mechanical Infrastructure

By Cooling Technique

Air-based Cooling Technique

Liquid-based Cooling Technique

By General Construction

Core and Shell Development

Installation and Commissioning Services

Engineering and Building Designs

Physical Security

DCIM/BMS

By Tier Standards

Tier I & II

Tier III

Tier IV

INSIGHTS BY GEOGRAPHY

In 2020, Western Europe witnessed investments in 80 projects, out of which 20 projects became operational in Q3 2020. However, the remaining projects are still under development and are expected to be functional by Q2 2021. The demand for smart devices, coupled with growing internet penetration, is likely to fuel the growth of data centers and other related infrastructure in the region. Data centers in Western Europe

are built to support OCP rack infrastructure solutions. The UK, the Netherlands, Germany, and France are the leading destinations, while Belgium, Ireland, Italy, and Switzerland are the emerging markets.

By Geography

Europe

Western Europe

UK

Germany

Netherlands

France

Ireland

Belgium

Switzerland

Luxembourg

Other Countries

Nordic

Denmark

Norway

Sweden

Finland & Iceland

Central and Eastern Europe

Russia and the Czech Republic

Poland & Austria

Other Countries

INSIGHTS BY VENDORS

The Europe data center market consists of several IT, electrical, and mechanical infrastructure providers. Arista Networks, Atos, Broadcom, Cisco Systems, Dell Technologies, and Extreme Networks some major IT infrastructure providers. With the increasing demand for high-density, mission-critical servers, storage, and network infrastructure, the IT infrastructure market is likely to witness growth. The server market has witnessed significant growth in revenue contribution from ODM server manufacturers. The electrical infrastructure market has become highly competitive owing to the increased interest shown by operators in procuring energy-efficient infrastructure solutions. ABB, Eaton, Schneider Electric, and Vertiv are the major power infrastructure players.

Key Data Center Critical (IT) Infrastructure Providers

Arista Networks

Atos

Broadcom

Cisco Systems

Dell Technologies

Extreme Networks

Huawei Technologies

Hewlett Packard Enterprise (HPE)

Hitachi Vantara

IBM

Inspur

Inventec

Juniper Networks

Lenovo

MiTAC Holdings

NEC Corporation

NetApp

Oracle

Pure Storage

Quanta Computer (Quanta Cloud Technology)

Super Micro Computer

Wistron (Wiwynn)

Key Data Center Support Infrastructure Providers

ABB

Airedale International Air Conditioning

Asetek

Alfa Laval

Assa Abloy

Bosch Security Systems (Robert Bosch)

Caterpillar

Cummins

Delta Electronics

Eaton

HITEC Power Protection

KOHLER-SDMO

Legrand

Mitsubishi Electric Corporation

Nlyte Software

Piller Power Systems

Rolls-Royce Power Systems

Rittal

Riello Elettronica (Riello UPS)

Schneider Electric

STULZ

Socomec

Trane Technologies (Ingersoll Rand)

Vertiv Group

Key Data Center Contractors

AECOM

Arup Group

Bouygues Construction

CapIngelec

DPR Construction

Deerns

Fluor Corporation

Future-Tech

HDR Architecture

ISG

Jones Engineering Group

Kirby Group Engineering

Linesight

Mercury Engineering

Mace Group

M+W Group (Exyte)

Metnor Construction

RED-Engineering

Structure Tone

Winthrop Engineering and Contracting

Key Data Center Investors

3data

Aruba SpA

AzInTelecom

Bahnhof

CyrusOne

Colt Data Center Services (Colt DCS)

Digital Realty

DigiPlex

DataPro

DATA4 Smart Data Centers

Equinix

Echelon Data Centers

EcoDataCenter

Facebook

Google

Global Switch

GlobalConnect

Green Mountain

Iron Mountain (IO)

Microsoft

NTT Global Data Centers

QTS Realty Trust

VIRTUS Data Centres

Telecom Italia Sparkle

T5 Data Centers

Vantage Data Centers

KEY QUESTIONS ANSWERED

1. What is the European data center market size and growth rate during the forecast period?
2. What are major innovations in UPS battery technologies adopted by data center infrastructure providers?
3. How is the COVID-19 pandemic expected to affect the market growth during the forecast period?
4. What EU data center regulations are likely to increase aid the Europe data center market?
5. Which segment is expected to generate the highest revenue during the forecast period?

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

4.4.1 Market Segmentation by Infrastructure

4.4.2 Market Segmentation by IT Infrastructure

4.4.3 Market Segmentation by Electrical Infrastructure

4.4.4 Market Segmentation by Mechanical Infrastructure

4.4.5 Market Segmentation by Cooling Systems

4.4.6 Market Segmentation by Cooling Techniques

4.4.7 Market Segmentation by General Construction

4.4.8 Market Segmentation by Tier Standards

4.4.9 Market Segmentation by Geography

5 REPORT ASSUMPTION & CAVEATS

5.1 Key Caveats

5.2 Currency Conversion

5.3 Market Derivation

6 MARKET AT A GLANCE

7 INTRODUCTION

7.1 Electricity Pricing In Europe

7.2 Data Center Site Selection Criteria

7.3 Submarine Cables

8 MARKET OPPORTUNITIES & TRENDS

- 8.1 5G To Boost Edge Data Center Investments
- 8.2 Growing Procurement Of Renewable Energy
- 8.3 Innovative Ups Battery Technology
- 8.4 Adoption Of District Heating By Data Centers
- 8.5 Increased Adoption Of 200/400 GBE Switch Ports

9 MARKET ENABLERS

- 9.1 COVID-19 Enhances Data Center Demand
- 9.2 Cloud Adoption Drives Data Center Market
- 9.3 Increasing Demand For Big Data & IoT Investments
- 9.4 Rise In Colocation Investments
- 9.5 M&As to Fuel Data Center Growth
- 9.6 Tax Incentives Increase Data Center Investments
- 9.7 Data Regulations Increase Cloud & Colocation Data Center Investments

10 MARKET RESTRAINTS

- 10.1 Increased Power & Network Outages
- 10.2 Security Challenges In Data Centers
- 10.3 Lack Of Skilled Workforce
- 10.4 Rising Carbon Emissions From Data Centers
- 10.5 Location Constraints For Data Center Construction

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 Five Forces Analysis
 - 11.5.1 Threat of New Entrants
 - 11.5.2 Bargaining Power of Suppliers
 - 11.5.3 Bargaining Power of Buyers
 - 11.5.4 Threat of Substitutes
 - 11.5.5 Competitive Rivalry

12 INFRASTRUCTURE

- 12.1 Market Snapshot & Growth Engine
- 12.2 Market Overview
- 12.3 IT Infrastructure
 - 12.3.1 Market Overview
 - 12.3.2 Market Size & Forecast
- 12.4 Electrical Infrastructure
 - 12.4.1 Market Overview
 - 12.4.2 Market Size & Forecast
- 12.5 Mechanical Infrastructure
 - 12.5.1 Market Overview
 - 12.5.2 Market Size & Forecast
- 12.6 General Construction
 - 12.6.1 Market Overview
 - 12.6.2 Market Size & Forecast

13 IT INFRASTRUCTURE

- 13.1 Market Snapshot & Growth Engine
- 13.2 Server Infrastructure
 - 13.2.1 Market Overview
 - 13.2.2 Market Size & Forecast
- 13.3 Storage Infrastructure
 - 13.3.1 Market Overview
 - 13.3.2 Market Size & Forecast
- 13.4 Network Infrastructure
 - 13.4.1 Market Overview
 - 13.4.2 Market Size & Forecast

14 ELECTRICAL INFRASTRUCTURE

- 14.1 Market Snapshot & Growth Engine
- 14.2 UPS Systems
 - 14.2.1 Market Overview
 - 14.2.2 Market Size & Forecast
- 14.3 Generators
 - 14.3.1 Market Overview
 - 14.3.2 Market Size & Forecast
- 14.4 Transfer Switches & Switchgear

- 14.4.1 Market Overview
- 14.4.2 Market Size & Forecast
- 14.5 Power Distribution Units
 - 14.5.1 Market Overview
 - 14.5.2 Market Size & Forecast
- 14.6 Other Electrical Infrastructure
 - 14.6.1 Market Overview
 - 14.6.2 Market Size & Forecast

15 MECHANICAL INFRASTRUCTURE

- 15.1 Market Snapshot & Growth Engine
- 15.2 Cooling Systems
 - 15.2.1 Market Overview
 - 15.2.2 Market Size & Forecast
- 15.3 Racks
 - 15.3.1 Market Overview
 - 15.3.2 Market Size & Forecast
- 15.4 Other Mechanical Infrastructure
 - 15.4.1 Market Overview
 - 15.4.2 Market Size & Forecast

16 COOLING SYSTEMS

- 16.1 Market Snapshot & Growth Engine
- 16.2 CRAC & CRAH Units
 - 16.2.1 Market Overview
 - 16.2.2 Market Size & Forecast
- 16.3 Chiller Units
 - 16.3.1 Market Overview
 - 16.3.2 Market Size & Forecast
- 16.4 Cooling Towers, Condensers & Dry Coolers
 - 16.4.1 Market Overview
 - 16.4.2 Market Size & Forecast
- 16.5 Economizers & Evaporative Coolers
 - 16.5.1 Market Overview
 - 16.5.2 Market Size & Forecast
- 16.6 Other Cooling Units
 - 16.6.1 Market Overview

16.6.2 Market Size & Forecast

17 COOLING TECHNIQUE

17.1 Market Snapshot & Growth Engine

17.2 Air-Based Cooling Techniques

17.2.1 Market Overview

17.2.2 Market Size & Forecast

17.3 Liquid-Based Cooling Techniques

17.3.1 Market Overview

17.3.2 Market Size & Forecast

18 GENERAL CONSTRUCTION

18.1 Market Snapshot & Growth Engine

18.2 Core & Shell Development

18.2.1 Market Overview

18.2.2 Market Size & Forecast

18.3 Installation & Commissioning Services

18.3.1 Market Overview

18.3.2 Market Size & Forecast

18.4 Building & Engineering Design

18.4.1 Market Overview

18.4.2 Market Size & Forecast

18.5 Physical Security

18.5.1 Market Overview

18.5.2 Market Size & Forecast

18.6 DCIM/BMS

18.6.1 Market Overview

18.6.2 Market Size & Forecast

19 TIER STANDARDS

19.1 Market Snapshot & Growth Engine

19.2 Overview Of Tier Standards

19.3 TIER I & II

19.3.1 Market Overview

19.3.2 Market Size & Forecast

19.4 TIER III

- 19.4.1 Market Overview
- 19.4.2 Market Size & Forecast

19.5 TIER IV

- 19.5.1 Market Overview
- 19.5.2 Market Size & Forecast

20 GEOGRAPHY

20.1 Market Snapshot & Growth Engine

21 WESTERN EUROPE

- 21.1 Investment: Snapshot & Growth Engine
- 21.2 Area: Snapshot & Growth Engine
- 21.3 Power Capacity: Snapshot & Growth Engine
- 21.4 Market Overview
- 21.5 Investment
 - 21.5.1 Market Size & Forecast
- 21.6 Area
 - 21.6.1 Market Size & Forecast
- 21.7 Power Capacity
 - 21.7.1 Market Size & Forecast
- 21.8 IT Infrastructure
 - 21.8.1 Market Size & Forecast
- 21.9 Support Infrastructure
 - 21.9.1 Market Size & Forecast
- 21.10 UK
 - 21.10.1 Market Overview
 - 21.10.2 Investment: Market Size & Forecast
 - 21.10.3 Area: Market Size & Forecast
 - 21.10.4 Power Capacity: Market Size & Forecast
 - 21.10.5 Support Infrastructure: Market Size & Forecast
- 21.11 Germany
 - 21.11.1 Market Overview
 - 21.11.2 Investment: Market Size & Forecast
 - 21.11.3 Area: Market Size & Forecast
 - 21.11.4 Power Capacity: Market Size & Forecast
 - 21.11.5 Support Infrastructure: Market Size & Forecast
- 21.12 Netherlands

- 21.12.1 Market Overview
- 21.12.2 Investment: Market Size & Forecast
- 21.12.3 Area: Market Size & Forecast
- 21.12.4 Power Capacity: Market Size & Forecast
- 21.12.5 Support Infrastructure: Market Size & Forecast
- 21.13 France
 - 21.13.1 Market Overview
 - 21.13.2 Investment: Market Size & Forecast
 - 21.13.3 Area: Market Size & Forecast
 - 21.13.4 Power Capacity: Market Size & Forecast
 - 21.13.5 Support Infrastructure: Market Size & Forecast
- 21.14 Ireland
 - 21.14.1 Market Overview
 - 21.14.2 Investment: Market Size & Forecast
 - 21.14.3 Area: Market Size & Forecast
 - 21.14.4 Power Capacity: Market Size & Forecast
 - 21.14.5 Support Infrastructure: Market Size & Forecast
- 21.15 Belgium
 - 21.15.1 Market Overview
 - 21.15.2 Investment: Market Size & Forecast
 - 21.15.3 Area: Market Size & Forecast
 - 21.15.4 Power Capacity: Market Size & Forecast
 - 21.15.5 Support Infrastructure: Market Size & Forecast
- 21.16 Switzerland
 - 21.16.1 Market Overview
 - 21.16.2 Investment: Market Size & Forecast
 - 21.16.3 Area: Market Size & Forecast
 - 21.16.4 Power Capacity: Market Size & Forecast
 - 21.16.5 Support Infrastructure: Market Size & Forecast
- 21.17 Luxembourg
 - 21.17.1 Market Overview
 - 21.17.2 Investment: Market Size & Forecast
 - 21.17.3 Area: Market Size & Forecast
 - 21.17.4 Power Capacity: Market Size & Forecast
 - 21.17.5 Support Infrastructure: Market Size & Forecast
- 21.18 Other Western European Countries
 - 21.18.1 Market Overview
 - 21.18.2 Investment: Market Size & Forecast
 - 21.18.3 Area: Market Size & Forecast

21.18.4 Power Capacity: Market Size & Forecast

21.18.5 Support Infrastructure: Market Size & Forecast

22 NORDIC REGION

22.1 Investment: Snapshot & Growth Engine

22.2 Area: Snapshot & Growth Engine

22.3 Power Capacity: Snapshot & Growth Engine

22.4 Market Overview

22.5 Investment

22.5.1 Market Size & Forecast

22.6 Area

22.6.1 Market Size & Forecast

22.7 Power Capacity

22.7.1 Market Size & Forecast

22.8 IT Infrastructure

22.8.1 Market Size & Forecast

22.9 Support Infrastructure

22.9.1 Market Size & Forecast

22.10 DENMARK

22.10.1 Market Overview

22.10.2 Investment: Market Size & Forecast

22.10.3 Area: Market Size & Forecast

22.10.4 Power Capacity: Market Size & Forecast

22.10.5 Support Infrastructure: Market Size & Forecast

22.11 Norway

22.11.1 Market Overview

22.11.2 Investment: Market Size & Forecast

22.11.3 Area: Market Size & Forecast

22.11.4 Power Capacity: Market Size & Forecast

22.11.5 Support Infrastructure: Market Size & Forecast

22.12 Sweden

22.12.1 Market Overview

22.12.2 Investment: Market Size & Forecast

22.12.3 Area: Market Size & Forecast

22.12.4 Power Capacity: Market Size & Forecast

22.12.5 Support Infrastructure: Market Size & Forecast

22.13 Finland & Iceland

22.13.1 Market Overview

- 22.13.2 Investment: Market Size & Forecast
- 22.13.3 Area: Market Size & Forecast
- 22.13.4 Power Capacity: Market Size & Forecast
- 22.13.5 Support Infrastructure: Market Size & Forecast

23 CENTRAL & EASTERN EUROPE (CEE)

- 23.1 Investment: Snapshot & Growth Engine
- 23.2 Area: Snapshot & Growth Engine
- 23.3 Power Capacity: Snapshot & Growth Engine
- 23.4 Market Overview
- 23.5 Investment
 - 23.5.1 Market Size & Forecast
- 23.6 Area
 - 23.6.1 Market Size & Forecast
- 23.7 Power Capacity
 - 23.7.1 Market Size & Forecast
- 23.8 IT Infrastructure
 - 23.8.1 Market Size & Forecast
- 23.9 Support Infrastructure
 - 23.9.1 Market Size & Forecast
- 23.1 Russia & The Czech Republic (RCR)
 - 23.10.1 Market Overview
 - 23.10.2 Investment: Market Size & Forecast
 - 23.10.3 Area: Market Size & Forecast
 - 23.10.4 Power Capacity: Market Size & Forecast
 - 23.10.5 Support Infrastructure: Market Size & Forecast
- 23.11 Poland & Austria
 - 23.11.1 Market Overview
 - 23.11.2 Investment: Market Size & Forecast
 - 23.11.3 Area: Market Size & Forecast
 - 23.11.4 Power Capacity: Market Size & Forecast
 - 23.11.5 Support Infrastructure: Market Size & Forecast
- 23.12 Other CEE Countries
 - 23.12.1 Market Overview
 - 23.12.2 Investment: Market Size & Forecast
 - 23.12.3 Area: Market Size & Forecast
 - 23.12.4 Power Capacity: Market Size & Forecast
 - 23.12.5 Support Infrastructure: Market Size & Forecast

24 COMPETITIVE LANDSCAPE

24.1 IT Infrastructure

24.1.1 Server Infrastructure

24.1.2 Storage Infrastructure

24.1.3 Network Infrastructure

24.2 Electrical Infrastructure

24.3 Mechanical Infrastructure

24.4 General Construction

25 PROMINENT CRITICAL (IT) INFRASTRUCTURE PROVIDERS

25.1 Arista Networks

25.1.1 Business Overview

25.1.2 Product Offerings

25.2 ATOS

25.2.1 Business Overview

25.2.2 Product Offerings

25.3 Broadcom

25.3.1 Business Overview

25.3.2 Product Offerings

25.3.3 Key News

25.4 Cisco Systems

25.4.1 Business Overview

25.4.2 Product Offerings

25.5 Dell Technologies

25.5.1 Business Overview

25.5.2 Product Offerings

25.6 Extreme Networks

25.6.1 Business Overview

25.6.2 Product Offerings

25.7 Huawei Technologies

25.7.1 Business Overview

25.7.2 Product Offerings

25.7.3 Key News

25.8 Hewlett Packard Enterprise (HPE)

25.8.1 Business Overview

25.8.2 Product Offerings

- 25.8.3 Key News
- 25.9 Hitachi Vantara
 - 25.9.1 Business Overview
 - 25.9.2 Product Offerings
- 25.10 International Business Machines (IBM)
 - 25.10.1 Business Overview
 - 25.10.2 Product Offerings
- 25.11 Inspur
 - 25.11.1 Business Overview
 - 25.11.2 Product Offerings
 - 25.11.3 Key News
- 25.12 Inventec
 - 25.12.1 Business Overview
 - 25.12.2 Product Offerings
- 25.13 Juniper Networks
 - 25.13.1 Business Overview
 - 25.13.2 Product Offerings
- 25.14 Lenovo
 - 25.14.1 Business Overview
 - 25.14.2 Product Offerings
- 25.15 Mitac Holdings
 - 25.15.1 Business Overview
 - 25.15.2 Products Offerings
- 25.16 NEC Corporation
 - 25.16.1 Business Overview
 - 25.16.2 Product Offerings
- 25.17 NETAPP
 - 25.17.1 Business Overview
 - 25.17.2 Product Offerings
- 25.18 Oracle
 - 25.18.1 Business Overview
 - 25.18.2 Product Offerings
- 25.19 Pure Storage
 - 25.19.1 Business Overview
 - 25.19.2 Product Offerings
- 25.2 Quanta Computer (Quanta Cloud Technology)
 - 25.20.1 Business Overview
 - 25.20.2 Product Offerings
- 25.21 Super Micro Computer

- 25.21.1 Business Overview
- 25.21.2 Product Offerings
- 25.22 WISTRON (WIWYNN)
- 25.22.1 Business Overview
- 25.22.2 Product Offerings

26 PROMINENT SUPPORT INFRASTRUCTURE PROVIDERS

- 26.1 ABB
 - 26.1.1 Business Overview
 - 26.1.2 Product Offerings
- 26.2 Airedale International Air Conditioning
 - 26.2.1 Business Overview
 - 26.2.2 Product Offerings
 - 26.2.3 Key News
- 26.3 Asetek
 - 26.3.1 Business Overview
 - 26.3.2 Product Offerings
- 26.4 Alfa Laval
 - 26.4.1 Business Overview
 - 26.4.2 Product Offerings
- 26.5 Assa Abloy
 - 26.5.1 Business Overview
 - 26.5.2 Product Offerings
- 26.6 Bosch Security Systems (Robert Bosch)
 - 26.6.1 Business Overview
 - 26.6.2 Product Offerings
- 26.7 Caterpillar
 - 26.7.1 Business Overview
 - 26.7.2 Product Offerings
- 26.8 Cummins
 - 26.8.1 Business Overview
 - 26.8.2 Product Offerings
- 26.9 Delta Electronics
 - 26.9.1 Business Overview
 - 26.9.2 Product Offerings
- 26.10 Eaton
 - 26.10.1 Business Overview
 - 26.10.2 Product Offerings

- 26.10.3 Key News
- 26.11 Hitec Power Protection
 - 26.11.1 Business Overview
 - 26.11.2 Product Offerings
- 26.12 Kohler-Sdmo
 - 26.12.1 Business Overview
 - 26.12.2 Product Offerings
- 26.13 Legrand
 - 26.13.1 Business Overview
 - 26.13.2 Product Offerings
- 26.14 Mitsubishi Electric Corporation
 - 26.14.1 Business Overview
 - 26.14.2 Product Offerings
- 26.15 Nlyte Software
 - 26.15.1 Business Overview
 - 26.15.2 Product Offerings
- 26.16 Piller Power Systems
 - 26.16.1 Business overview
 - 26.16.2 Product offerings
 - 26.16.3 Key news
- 26.17 Rolls-Royce Power Systems
 - 26.17.1 Business Overview
 - 26.17.2 Product Offerings
 - 26.17.3 Key News
- 26.18 Rittal
 - 26.18.1 Business Overview
 - 26.18.2 Product Offerings
- 26.19 Riello Elettronica (RIELLO UPS)
 - 26.19.1 Business Overview
 - 26.19.2 Product Offerings
- 26.20 Schneider Electric
 - 26.20.1 Business Overview
 - 26.20.2 Product Offerings
- 26.21 STULZ
 - 26.21.1 Business Overview
 - 26.21.2 Product Offerings
- 26.22 Socomec
 - 26.22.1 Business Overview
 - 26.22.2 Product Offerings

- 26.22.3 Key News
- 26.23 Trane Technologies (Ingersoll Rand)
 - 26.23.1 Business Overview
 - 26.23.2 Product Offerings
- 26.24 Vertiv Group
 - 26.24.1 Business Overview
 - 26.24.2 Product Offerings

27 PROMINENT CONSTRUCTION CONTRACTORS

- 27.1 AECOM
 - 27.1.1 Business Overview
 - 27.1.2 Service Offerings
- 27.2 Arup Group
 - 27.2.1 Business Overview
 - 27.2.2 Service Offerings
- 27.3 Bouygues Construction
 - 27.3.1 Business Overview
 - 27.3.2 Service Offerings
- 27.4 Capingelec
 - 27.4.1 Business Overview
 - 27.4.2 Service Offerings
- 27.5 Dpr Construction
 - 27.5.1 Business Overview
 - 27.5.2 Service Offerings
- 27.6 Deerns
 - 27.6.1 Business Overview
 - 27.6.2 Service Offerings
- 27.7 Fluor Corporation
 - 27.7.1 Business Overview
 - 27.7.2 Service Offerings
- 27.8 Future-Tech
 - 27.8.1 Business Overview
 - 27.8.2 Service Offerings
- 27.9 HDR Architecture
 - 27.9.1 Business Overview
 - 27.9.2 Service Offerings
- 27.1 ISG
 - 27.10.1 Business Overview

- 27.10.2 Service Offerings
- 27.11 Jones Engineering Group
 - 27.11.1 Business Overview
 - 27.11.2 Service Offerings
- 27.12 Kirby Group Engineering
 - 27.12.1 Business Overview
 - 27.12.2 Service Offerings
- 27.13 Linesight
 - 27.13.1 Business Overview
 - 27.13.2 Service Offerings
- 27.14 Mercury Engineering
 - 27.14.1 Business Overview
 - 27.14.2 Service Offerings
- 27.15 MACE Group
 - 27.15.1 Business Overview
 - 27.15.2 Service Offerings
- 27.16 M+W GROUP (EXCYTE)
 - 27.16.1 Business Overview
 - 27.16.2 Service Offerings
- 27.17 Metnor Construction
 - 27.17.1 Business Overview
 - 27.17.2 Service Offerings
- 27.18 Red-Engineering
 - 27.18.1 Business Overview
 - 27.18.2 Service Offerings
- 27.19 Structure Tone
 - 27.19.1 Business Overview
 - 27.19.2 Service Offerings
- 27.20 Winthrop Engineering And Contracting
 - 27.20.1 Business Overview
 - 27.20.2 Service Offerings

28 PROMINENT DATA CENTER INVESTORS

- 28.1 3DATA
 - 28.1.1 Business Overview
 - 28.1.2 Service Offerings
- 28.2 Aruba
 - 28.2.1 Business Overview

- 28.2.2 Service Offerings
- 28.3 Azintelecom
 - 28.3.1 Business Overview
 - 28.3.2 Service Offerings
- 28.4 Bahnhof
 - 28.4.1 Business Overview
 - 28.4.2 Service Offerings
- 28.5 Cyrusone
 - 28.5.1 Business Overview
 - 28.5.2 Service Offerings
 - 28.5.3 Key News
- 28.6 Colt Data Center Services (COLT DCS)
 - 28.6.1 Business Overview
 - 28.6.2 Service Offerings
- 28.7 Digital Realty
 - 28.7.1 Business Overview
 - 28.7.2 Service Offerings
 - 28.7.3 Key News
- 28.8 Digiplex
 - 28.8.1 Overview
 - 28.8.2 Service Offerings
- 28.9 Datapro
 - 28.9.1 Business Overview
 - 28.9.2 Service Offerings
- 28.10 Data4 Smart Data Centers
 - 28.10.1 Business Overview
 - 28.10.2 Service Offerings
- 28.11 Equinix
 - 28.11.1 Business Overview
 - 28.11.2 Service Offerings
 - 28.11.3 Key News
- 28.12 Echelon Data Centers
 - 28.12.1 Business Overview
 - 28.12.2 Service Offerings
- 28.13 Ecodatacenter
 - 28.13.1 Business Overview
 - 28.13.2 Service Offerings
- 28.14 Facebook
 - 28.14.1 Business Overview

- 28.14.2 Service Offerings
- 28.15 Google
 - 28.15.1 Business Overview
 - 28.15.2 Service Offerings
- 28.16 Global Switch
 - 28.16.1 Business Overview
 - 28.16.2 Service Offerings
 - 28.16.3 Key News
- 28.17 Globalconnect
 - 28.17.1 Business Overview
 - 28.17.2 Service Offerings
- 28.18 Green Mountain
 - 28.18.1 Business Overview
 - 28.18.2 Service Offerings
- 28.19 Iron Mountain (IO)
 - 28.19.1 Business Overview
 - 28.19.2 Service Offerings
- 28.20 Microsoft
 - 28.20.1 Business Overview
- 28.21 NTT Global Data Centers
 - 28.21.1 Business Overview
 - 28.21.2 Service Offerings
- 28.22 QTS Realty Trust
 - 28.22.1 Business Overview
 - 28.22.2 Service Offerings
 - 28.22.3 Key News
- 28.23 Virtus Data Centers
 - 28.23.1 Business Overview
 - 28.23.2 Service Offerings
 - 28.23.3 Key News
- 28.24 Telecom Italia Sparkle
 - 28.24.1 Business Overview
 - 28.24.2 Service Offerings
- 28.25 T5 Data Centers
 - 28.25.1 Business Overview
 - 28.25.2 Service Offerings
- 28.26 Vantage Data Centers
 - 28.26.1 Business Overview
 - 28.26.2 Service Offerings

28.26.3 Key News

29 REPORT SUMMARY

29.1 Key Takeaways

30 QUANTITATIVE SUMMARY

30.1 Data Center Market in Europe

30.1.1 Overall Market

30.1.2 Overall Market (Including IT Infrastructure)

30.1.3 Infrastructure: Market Size & Forecast

30.1.4 IT Infrastructure: Market Size & Forecast

30.1.5 Electrical Infrastructure: Market Size & Forecast

30.1.6 Mechanical Infrastructure: Market Size & Forecast

30.1.7 Cooling Systems: Market Size & Forecast

30.1.8 Cooling Techniques: Market Size & Forecast

30.1.9 General Construction: Market Size & Forecast

30.1.10 Tier Standards: Market Size & Forecast

30.2 Geography

30.2.1 Investment by Region

30.2.2 Area by Region

30.2.3 Power Capacity by Region

30.3 Western Europe

30.3.1 Overall Market Size

30.3.2 Market by Infrastructure

30.4 UK

30.4.1 Overall Market Size

30.4.2 Market by Infrastructure

30.5 Germany

30.5.1 Overall Market Size

30.5.2 Market by Infrastructure

30.6 Netherlands

30.6.1 Overall Market Size

30.6.2 Market By Infrastructure

30.7 France

30.7.1 Overall Market Size

30.7.2 Market By Infrastructure

30.8 Ireland

- 30.8.1 Overall Market Size
- 30.8.2 Market by Infrastructure
- 30.9 Switzerland
 - 30.9.1 Overall Market Size
 - 30.9.2 Market By Infrastructure
- 30.10 Belgium
 - 30.10.1 Overall Market Size
 - 30.10.2 Market by Infrastructure
- 30.11 Luxembourg
 - 30.11.1 Overall Market Size
 - 30.11.2 Market By Infrastructure
- 30.12 Other Western European Countries
 - 30.12.1 Overall Market Size
 - 30.12.2 Market by Infrastructure
- 30.13 Nordics
 - 30.13.1 Overall Market Size
 - 30.13.2 Market By Infrastructure
- 30.14 Denmark
 - 30.14.1 Overall Market Size
 - 30.14.2 Market By Infrastructure
- 30.15 Norway
 - 30.15.1 Overall Market Size
 - 30.15.2 Market By Infrastructure
- 30.16 Sweden
 - 30.16.1 Overall Market Size
 - 30.16.2 Market by Infrastructure
- 30.17 Finland & Iceland
 - 30.17.1 Overall Market Size
 - 30.17.2 Market By Infrastructure
- 30.18 Central & Eastern Europe
 - 30.18.1 Overall Market Size
 - 30.18.2 Market by Infrastructure
- 30.19 Russia & Czech Republic
 - 30.19.1 Overall Market Size
 - 30.19.2 Market By Infrastructure
- 30.20 Poland & Austria
 - 30.20.1 Overall Market Size
 - 30.20.2 Market by Infrastructure
- 30.21 Other Central & Eastern European Countries

- 30.21.1 Overall Market Size
- 30.21.2 Market By Infrastructure

31 APPENDIX

- 31.1 Abbreviations

List Of Exhibits

LIST OF EXHIBITS

- Exhibit 1 Segmentation of Data Center Market in Europe
- Exhibit 2 Market Size Calculation Approach 2020
- Exhibit 3 Average Electricity Pricing in Europe 2020 (per kWh)
- Exhibit 4 Impact of 5G to Boost Edge Data Center Investments
- Exhibit 5 Impact of Growing Procurement of Renewable Energy
- Exhibit 6 Renewable Energy Purchases by Data Center Providers in Europe in 2020
- Exhibit 7 Impact of Innovative UPS Battery Technology
- Exhibit 8 Impact of Adoption of District Heating by Data Centers
- Exhibit 9 Impact of Increased Adoption of 200/400 GBE Switch Ports
- Exhibit 10 Impact of COVID-19 Enhances Data Center Demand
- Exhibit 11 Impact of Cloud Adoption Drives Data Center Market
- Exhibit 12 Impact of Increasing Demand for Big Data & IoT Investments
- Exhibit 13 Impact of Rise in Colocation Investments
- Exhibit 14 Number of Colocation Projects by European Region (2020)
- Exhibit 15 Impact of M&As to Fuel Data Center Growth
- Exhibit 16 Impact of Tax Incentives Increase Data Center Investments
- Exhibit 17 Impact of Data Regulation Increases the Cloud & Colocation Data Center Investments
- Exhibit 18 Impact of Increased Power & Network Outages
- Exhibit 19 Impact of Security Challenges in Data Centers
- Exhibit 20 Impact of Lack of Skilled Workforce
- Exhibit 21 Impact of Rising Carbon Emissions from Data Centers
- Exhibit 22 Impact of Location Constraints for Data Center Construction
- Exhibit 23 Data Center Market in Europe 2020?2026 (\$ billion)
- Exhibit 24 Europe Market: IT Infrastructure & Support Infrastructure 2020?2026 (\$ billion)
- Exhibit 25 Data Center Market in Europe by Area 2020?2026 (million square feet)
- Exhibit 26 Data Center Market in Europe by Power Capacity 2020?2026 (MW)
- Exhibit 27 Five Forces Analysis 2020
- Exhibit 28 Incremental Growth by Infrastructure 2020 & 2026
- Exhibit 29 Data Center Market in Europe by Infrastructure
- Exhibit 30 Data Center IT Infrastructure Market in Europe 2020?2026 (\$ billion)
- Exhibit 31 Data Center Electrical Infrastructure Market in Europe 2020?2026 (\$ billion)
- Exhibit 32 Data Center Mechanical Infrastructure Market in Europe 2020?2026 (\$ billion)

- Exhibit 33 Data Center General Construction Market in Europe 2020?2026 (\$ billion)
- Exhibit 34 Incremental Growth by IT Infrastructure 2020 & 2026
- Exhibit 35 Data Center Server Infrastructure Market in Europe 2020–2026 (\$ billion)
- Exhibit 36 Data Center Storage Infrastructure Market in Europe 2020–2026 (\$ billion)
- Exhibit 37 Data Center Network Infrastructure Market in Europe 2020?2026 (\$ billion)
- Exhibit 38 Incremental Growth by Electrical Infrastructure 2020 & 2026
- Exhibit 39 Data Center UPS Systems Market in Europe 2020?2026 (\$ million)
- Exhibit 40 Data Center Generator Market in Europe 2020?2026 (\$ million)
- Exhibit 41 Data Center Transfer Switches & Switchgears Market in Europe 2020?2026 (\$ million)
- Exhibit 42 Data Center PDUs Market in Europe 2020?2026 (\$ million)
- Exhibit 43 Data Center Other Power Infrastructure Market in Europe 2020?2026 (\$ million)
- Exhibit 44 Incremental Growth by Mechanical Infrastructure 2020 & 2026
- Exhibit 45 Data Center Cooling Systems Market in Europe 2020?2026 (\$ million)
- Exhibit 46 Data Center Racks Market in Europe 2020–2026 (\$ million)
- Exhibit 47 Data Center Other Mechanical Infrastructure Market in Europe 2020?2026 (\$ million)
- Exhibit 48 Incremental Growth by Cooling Systems 2020 & 2026
- Exhibit 49 Data Center CRAC & CRAH Market in Europe 2020?2026 (\$ million)
- Exhibit 50 Data Center Chiller Units Market in Europe 2020?2026 (\$ million)
- Exhibit 51 Data Center Cooling Towers, Condensers & Dry Coolers Market in Europe 2020?2026 (\$ million)
- Exhibit 52 Data Center Economizers & Evaporative Coolers Market in Europe 2020?2026 (\$ million)
- Exhibit 53 Data Center Other Cooling Units Market in Europe 2020?2026 (\$ million)
- Exhibit 54 Incremental Growth by Cooling Technique 2020 & 2026
- Exhibit 55 Data Center Air-based Cooling Techniques Market in Europe 2020?2026 (\$ million)
- Exhibit 56 Data Center Liquid-based Cooling Technique Market in Europe 2020?2026 (\$ million)
- Exhibit 57 Incremental Growth by General Construction 2020 & 2026
- Exhibit 58 Data Center Core & Shell Development Market in Europe 2020–2026 (\$ million)
- Exhibit 59 Data Center Installation & Commissioning Market in Europe 2020–2026 (\$ million)
- Exhibit 60 Data Center Building & Engineering Design Market in Europe 2020–2026 (\$ million)
- Exhibit 61 Data Center Physical Security Market in Europe 2020–2026 (\$ million)

- Exhibit 62 Data Center DCIM/BMS Market in Europe 2020–2026 (\$ million)
- Exhibit 63 Incremental Growth by Tier Standards 2020 & 2026
- Exhibit 64 Overview of Tier Standards
- Exhibit 65 Number of Uptime Institute Certified Data Centers in Europe
- Exhibit 66 Tier I & Tier II Data Center Market in Europe 2020–2026 (\$ billion)
- Exhibit 67 Tier III Data Center Market in Europe 2020–2026 (\$ billion)
- Exhibit 68 Tier IV Data Center Market in Europe 2020?2026 (\$ billion)
- Exhibit 69 Incremental Growth by Geography 2020 & 2026
- Exhibit 70 Incremental Growth in Western Europe by Investment 2020 & 2026
- Exhibit 71 Incremental Growth in Western Europe by Area 2020 & 2026
- Exhibit 72 Incremental Growth in Western Europe by Power Capacity 2020 & 2026
- Exhibit 73 Data Center Market in Western Europe 2020?2026 (\$ billion)
- Exhibit 74 IT Infrastructure vs Support Infrastructure in Western Europe 2020?2026 (\$ billion)
- Exhibit 75 Data Center Market in Western Europe by Area 2020?2026 (Million Square Feet)
- Exhibit 76 Data Center Market in Western Europe by Power Capacity 2020?2026 (MW)
- Exhibit 77 Data Center IT Infrastructure Market in Western Europe 2020–2026 (\$ billion)
- Exhibit 78 Data Center Support Infrastructure Market in Western Europe 2020?2026 (\$ billion)
- Exhibit 79 Data Center Market in UK 2020?2026 (\$ million)
- Exhibit 80 Data Center Market in UK by Area 2020?2026 (Million Square Feet)
- Exhibit 81 Data Center Market in UK by Power Capacity 2020?2026 (MW)
- Exhibit 82 Data Center Support Infrastructure Market in UK 2020?2026 (\$ million)
- Exhibit 83 Data Center Market in Germany 2020?2026 (\$ million)
- Exhibit 84 Data Center Market in Germany by Area 2020?2026 (Million Square Feet)
- Exhibit 85 Data Center Market in Germany by Power Capacity 2020?2026 (MW)
- Exhibit 86 Data Center Support Infrastructure Market in Germany 2020?2026 (\$ million)
- Exhibit 87 Data Center Market in Netherlands 2020?2026 (\$ million)
- Exhibit 88 Data Center Market in Netherlands by Area 2020?2026 (Million Square Feet)
- Exhibit 89 Data Center Market in Netherlands by Power Capacity 2020?2026 (MW)
- Exhibit 90 Data Center Support Infrastructure Market in Netherlands 2020?2026 (\$ million)
- Exhibit 91 Data Center Market in France 2020?2026 (\$ million)
- Exhibit 92 Data Center Market in France by Area 2020?2026 (million square feet)
- Exhibit 93 Data Center Market in France by Power Capacity 2020?2026 (MW)
- Exhibit 94 Data Center Support Infrastructure Market in France 2020?2026 (\$ million)
- Exhibit 95 Data Center Market in Ireland 2020?2026 (\$ million)
- Exhibit 96 Data Center Market in Ireland by Area 2020?2026 (Million Square Feet)

- Exhibit 97 Data Center Market in Ireland by Power Capacity 2020?2026 (MW)
- Exhibit 98 Data Center Support Infrastructure Market in Ireland 2020?2026 (\$ million)
- Exhibit 99 Data Center Market in Belgium 2020?2026 (\$ million)
- Exhibit 100 Data Center Market in Belgium by Area 2020?2026 (million square feet)
- Exhibit 101 Data Center Market in Belgium by Power Capacity 2020?2026 (MW)
- Exhibit 102 Data Center Support Infrastructure Market in Belgium 2020?2026 (\$ million)
- Exhibit 103 Data Center Market in Switzerland 2020?2026 (\$ million)
- Exhibit 104 Data Center Market in Switzerland by Area 2020?2026 (million square feet)
- Exhibit 105 Data Center Market in Switzerland by Power Capacity 2020?2026 (MW)
- Exhibit 106 Data Center Support Infrastructure Market in Switzerland 2020?2026 (\$ million)
- Exhibit 107 Data Center Market in Luxembourg 2020?2026 (\$ million)
- Exhibit 108 Data Center Market in Luxembourg by Area 2020?2026 (million square feet)
- Exhibit 109 Data Center Market in Luxembourg by Power Capacity 2020?2026 (MW)
- Exhibit 110 Data Center Support Infrastructure Market in Luxembourg 2020?2026 (\$ million)
- Exhibit 111 Data Center Market in Other Western European Nations 2020?2026 (\$ million)
- Exhibit 112 Data Center Market in Other Western European Countries by Area 2020?2026 (million square feet)
- Exhibit 113 Data Center Market in Other Western European Countries by Power Capacity 2020?2026 (MW)
- Exhibit 114 Data Center Support Infrastructure Market in Other Western European Countries 2020?2026 (\$ million)
- Exhibit 115 Incremental Growth in Nordics by Investment 2020 & 2026
- Exhibit 116 Incremental Growth in Nordics by Area 2020 & 2026
- Exhibit 117 Incremental Growth in Nordics by Power Capacity 2020 & 2026
- Exhibit 118 Data Center Market in Nordics 2020–2026 (\$ billion)
- Exhibit 119 IT Infrastructure vs. Support Infrastructure in Nordics 2020–2026 (\$ billion)
- Exhibit 120 Data Center Market in Nordics by Area 2020–2026 (Million Square Feet)
- Exhibit 121 Data Center Market in Nordics by Power Capacity 2020–2026 (MW)
- Exhibit 122 Data Center IT Infrastructure Market in Nordics 2020–2026 (\$ billion)
- Exhibit 123 Data Center Support Infrastructure Market in Nordics 2020?2026 (\$ billion)
- Exhibit 124 Data Center Market in Denmark 2020?2026 (\$ million)
- Exhibit 125 Data Center Market in Denmark by Area 2020?2026 (Million Square Feet)
- Exhibit 126 Data Center Market in Denmark by Power Capacity 2020?2026 (MW)
- Exhibit 127 Data Center Support Infrastructure Market in Denmark 2020?2026 (\$ million)
- Exhibit 128 Data Center Market in Norway 2020?2026 (\$ million)

- Exhibit 129 Data Center Market in Norway by Area 2020?2026 (Million Square Feet)
- Exhibit 130 Data Center Market in Norway by Power Capacity 2020?2026 (MW)
- Exhibit 131 Data Center Support Infrastructure Market in Norway 2020?2026 (\$ million)
- Exhibit 132 Data Center Market in Sweden 2020?2026 (\$ million)
- Exhibit 133 Data Center Market in Sweden by Area 2020?2026 (Million Square Feet)
- Exhibit 134 Data Center Market in Sweden by Power Capacity 2020?2026 (MW)
- Exhibit 135 Data Center Support Infrastructure Market in Sweden 2020?2026 (\$ million)
- Exhibit 136 Data Center Market in Finland & Iceland 2020?2026 (\$ million)
- Exhibit 137 Data Center Market in Finland & Iceland by Area 2020?2026 (Million Square Feet)
- Exhibit 138 Data Center Market in Finland & Iceland by Power Capacity 2020?2026 (MW)
- Exhibit 139 Data Center Support Infrastructure Market in Finland & Iceland 2020?2026 (\$ million)
- Exhibit 140 Incremental Growth in Central & Eastern Europe (CEE) by Investment 2020 & 2026
- Exhibit 141 Incremental Growth in Central & Eastern Europe (CEE) by Area 2020 & 2026
- Exhibit 142 Incremental Growth in Central & Eastern Europe (CEE) by Power Capacity 2020 & 2026
- Exhibit 143 Data Center Market in Central & Eastern Europe 2020–2026 (\$ billion)
- Exhibit 144 IT Infrastructure vs Support Infrastructure in Central & Eastern Europe 2020–2026 (\$ billion)
- Exhibit 145 Data Center Market in Central & Eastern Europe by Area 2020–2026 (Million Square Feet)
- Exhibit 146 Data Center Market in Central & Eastern Europe by Power Capacity 2020–2026 (MW)
- Exhibit 147 Data Center IT Infrastructure Market in Central & Eastern Europe 2020–2026 (\$ billion)
- Exhibit 148 Data Center Support Infrastructure Market in Central & Eastern Europe 2020?2026 (\$ million)
- Exhibit 149 Data Center Market in Russia & the Czech Republic 2020?2026 (\$ million)
- Exhibit 150 Data Center Market in Russia & the Czech Republic by Area 2020?2026 (Million Square Feet)
- Exhibit 151 Data Center Market in Russia & the Czech Republic by Power Capacity 2020?2026 (MW)
- Exhibit 152 Data Center Support Infrastructure Market in RCR 2020?2026 (\$ million)
- Exhibit 153 Data Center Market in Poland & Austria 2020?2026 (\$ million)
- Exhibit 154 Data Center Market in Poland & Austria by Area 2020?2026 (Million Square

Feet)

Exhibit 155 Data Center Market in Poland & Austria by Power Capacity 2020?2026 (MW)

Exhibit 156 Data Center Support Infrastructure Market in Poland & Austria 2020?2026 (\$ million)

Exhibit 157 Data Center Market in Other CEE Countries 2020?2026 (\$ million)

Exhibit 158 Data Center Market in Other CEE Countries by Area 2020?2026 (Million Square Feet)

Exhibit 159 Data Center Market in Other CEE Countries by Power Capacity 2020?2026 (MW)

Exhibit 160 Data Center Support Infrastructure Market in Other CEE Countries 2020?2026 (\$ million)

List Of Tables

LIST OF TABLES

Table 1 Key Caveats

Table 2 Currency Conversion 2013?2020

Table 3 Data Center Site Selection Criteria

Table 4 12. List Of Submarine Fiber Cable Projects

Table 5 Impact of COVID-19 in the Data Center Market in 2020

Table 6 M&A Activities in 2020

Table 7 Data Center Market in Europe 2020?2026

Table 8 Europe Data Center IT Infrastructure & Support Infrastructure Market 2020?2026 (\$ billion)

Table 9 Data Center Infrastructure Market in Europe 2020?2026 (\$ billion)

Table 10 Data Center IT Infrastructure Market in Europe 2020?2026 (\$ billion)

Table 11 Data Center Electrical Infrastructure Market in Europe 2020?2026 (\$ million)

Table 12 Data Center Mechanical Infrastructure Market in Europe 2020?2026 (\$ million)

Table 13 Data Center Cooling Systems Market in Europe 2020?2026 (\$ million)

Table 14 Data Center Cooling Techniques Market in Europe 2020?2026 (\$ million)

Table 15 Data Center General Construction Market in Europe 2020?2026 (\$ million)

Table 16 Data Center Market in Europe by Tier Standards 2020?2026 (\$ billion)

Table 17 Data Center Market in Europe by Investment 2020?2026 (\$ billion)

Table 18 Data Center Market in Europe by Area 2020?2026 (million square feet)

Table 19 Data Center Market in Europe by Power Capacity 2020?2026 (MW)

Table 20 Data Center Market in Western Europe 2020?2026

Table 21 Data Center Infrastructure Market in Western Europe 2020?2026 (\$ billion)

Table 22 Data Center Market in UK 2020?2026

Table 23 Data Center Infrastructure Market in UK 2020?2026 (\$ million)

Table 24 Data Center Market in Germany 2020?2026

Table 25 Data Center Infrastructure Market in Germany 2020?2026 (\$ million)

Table 26 Data Center Market in Netherlands 2020?2026

Table 27 Data Center Infrastructure Market in Netherlands 2020?2026 (\$ million)

Table 28 Data Center Market in France 2020?2026

Table 29 Data Center Infrastructure Market in France 2020?2026 (\$ million)

Table 30 Data Center Market in Ireland 2020?2026

Table 31 Data Center Infrastructure Market in Ireland 2020?2026 (\$ million)

Table 32 Data Center Market in Switzerland 2020?2026

Table 33 Data Center Infrastructure Market in Switzerland 2020?2026 (\$ million)

Table 34 Data Center Market in Belgium 2020?2026

- Table 35 Data Center Infrastructure Market in Belgium 2020?2026 (\$ million)
- Table 36 Data Center Market in Luxembourg 2020?2026
- Table 37 Data Center Infrastructure Market in Luxembourg 2020?2026 (\$ million)
- Table 38 Data Center Market in Other Western European Countries 2020?2026
- Table 39 Data Center Infrastructure Market in Other Western European Countries 2020?2026 (\$ million)
- Table 40 Data Center Market in Nordics 2020?2026
- Table 41 Data Center Infrastructure Market in Nordics 2020?2026 (\$ billion)
- Table 42 Data Center Market in Denmark 2020?2026
- Table 43 Data Center Infrastructure Market in Denmark 2020?2026 (\$ million)
- Table 44 Data Center Market in Norway 2020?2026
- Table 45 Data Center Infrastructure Market in Norway 2020?2026 (\$ million)
- Table 46 Data Center Market in Sweden 2020?2026
- Table 47 Data Center Infrastructure Market in Sweden 2020?2026 (\$ million)
- Table 48 Data Center Market in Finland & Iceland 2020?2026
- Table 49 Data Center Infrastructure Market in Finland & Iceland 2020?2026 (\$ million)
- Table 50 Data Center Market in Central & Eastern Europe 2020?2026
- Table 51 Data Center Infrastructure Market in Central & Eastern Europe 2020?2026 (\$ billion)
- Table 52 Data Center Market in Russia & Czech Republic 2020?2026
- Table 53 Data Center Infrastructure Market in Russia & Czech Republic 2020?2026 (\$ million)
- Table 54 Data Center Market in Poland & Austria 2020?2026
- Table 55 Data Center Infrastructure Market in Poland & Austria 2020?2026 (\$ million)
- Table 56 Data Center Market in Other CEE Countries 2020?2026
- Table 57 Data Center Infrastructure Market in Other CEE Countries 2020?2026 (\$ million)

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