

Data Center Market in Nordic - Industry Outlook and Forecast 2019-2024

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Abstracts

The Nordic data center market is expected to grow at a CAGR of over 7% during the period 2018-2024.

The availability of land to develop data centers is an active driver for the growth of the Nordic data center market. Hyperscale operators and colocation providers are establishing data centers in the Nordic region to decrease the electricity cost. Hydro and wind powers are the major renewable energy sources in the Nordic region. Strong support from the local government and energy producers is a significant boost for the operators in the region. The operators are also procuring renewable energy.

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

Increased Demand for Cloud Computing

Growth in Hyperscale Colocation Investment

Availability of Renewable Energy Sources

Construction of Cryptocurrency Data Centers

Increase in Modular Data Center Deployment

This research report on the Nordic data center market covers market sizing and forecast, market share, industry trends, growth drivers, and vendor analysis. The market

study includes insights on the segmentation by electrical infrastructure (UPS, generators, rack power distribution units, transfer switches & switchgears, and other), mechanical infrastructure (cooling systems, racks, and other mechanical infrastructure), cooling systems (CRAC & CRAH, chiller units, cooling towers & dry coolers, economizers & evaporative coolers, and other cooling units), cooling technique (air-based cooling technique and liquid-based cooling technique), general construction (building development, installation & commissioning services, building design, physical security, DCIM), tier standards (Tier I&II, Tier III, and Tier IV), and geography (Iceland, Sweden, Denmark, and Finland).

The report considers the present scenario of the Nordic data center market during the forecast period and its market dynamics for the period 2018-2024. It covers a detailed overview of several market growth enablers, restraints, and trends. The report profiles and examines leading companies and several other prominent companies operating in the market.

Nordic Data Center Market: Segmentation

This research report includes detailed market segmentation by electrical infrastructure, mechanical infrastructure, cooling systems, general construction, tier standards, and geography. The use of lithium-ion UPS systems will continue to grow among data center operators in the region as they help to reduce the OPEX through low maintenance cost. Vendors are continually coming up with innovative UPS solutions that increase efficiency and reduce cost. Large and mega datacenters in Nordic are likely to procure UPS systems of over 750 kVA, whereas small and medium facilities are installing UPS systems with less than 500 kVA capacity. The adoption of generators in the Nordic data center market is likely to decline during the forecast period as the popularity of carbon-neutral facilities is growing.

To facilitate free cooling in data centers, the use of direct/indirect evaporative coolers and air/water-side economizers will continue to grow in the Nordic region. The Nordic data center market is likely to witness the adoption of Open 19 rack architecture and related IT infrastructure designs. It is expected that 42U and 48U racks will be major revenue contributors to the Nordic data center market.

The market for CRAC and CRAH units in the Nordic data center market is expected to grow steadily during the forecast period as several data centers are installing direct evaporative coolers, which do not use CRAC or CRAH systems. The chiller market in the Nordic region is expected to be low due to the extensive use of free cooling

systems. Further, the adoption of free cooling chillers with smart technology is growing as they enable operations based on outside temperatures and use limited water for cooling.

Although the Nordic region has a strong presence of infrastructure vendors, the dependency on engineering firms that operate at the regional or global level is high in the market. The increase in the investment in hyperscale facilities in the Nordic region is likely to generate the demand for local engineering expertise. Further, the increase in greenfield facilities will generate high revenue for installation and commission service providers in the Nordic region.

Colocation data center and managed service providers in the Nordic region are expected to comply with regulations and certifications. Designing a facility with prescribed rules provides high reliability, scalability, and flexibility in data center operations along with efficiency and resilience. The importance of physical security systems, along with relevant securities, is growing among service providers in the Nordic region. In the future, the data center market is likely to witness the increased use of robot monitoring systems in the facility with sensors and video surveillance. The DCIM market is expected to grow in the Nordic region due to the growing power consumption and increasing carbon emissions. The adoption of intelligent security solutions will continue to grow in Norway, with organizations planning to build facilities with EMP physical security protection.

The Nordic data center market by Tier I and Tier II is expected to decline during the forecast period. However, Tier III facilities are likely to grow during the forecast period in the Nordic region. Denmark and Norway have five and six facilities, respectively, which are certified by the Uptime Institute. Many operators are expected to move to the Tier IV category based on the growth in the rack power density and critical applications. Nordic countries are witnessing increased hyperscale investments from Google, Facebook, Microsoft, and AWS.

Market Segmentation by Electrical Infrastructure

UPS

Generators

Rack Power Distribution units

Transfer Switches and Switchgears

Others

Market Segmentation by Mechanical Infrastructure

Cooling Systems

Racks

Other Mechanical Infrastructure

Market Segmentation by Cooling Systems

CRAC & CRAH

Chiller Units

Cooling Towers & Dry Coolers

Economizer & Evaporative Coolers

Other Cooling Units

Market Segmentation by General Construction

Building Development

Installation & Commissioning Services

Building Design

Physical Security

Data Center Infrastructure Management (DCIM)

Market Segmentation by Tier Standard

Tier I and Tier II

Tier III

Tier IV

Nordic Data Center Market: Geography

The adoption of cloud-based services in Denmark is growing significantly. Denmark is an ideal location for data center operations because it has the closest proximity to other European countries and robust fiber connectivity inside the country. The increasing number of several submarine fiber cable projects from Denmark that connects with other European countries such as the UK, Germany, the Netherlands, France, and the US is growing. The increased construction of hyperscale data centers in Denmark is expected to lead the growth of intelligent and efficient power infrastructure solutions during the forecast period.

The Finland data center market has witnessed significant growth in the recent year. The adoption of PaaS and IaaS solutions is increasing in the country. The availability of 100% renewable energy sources is helping Iceland to emerge as the most favorable location for data center development in the Nordic region. Increasing tax incentives on data center property and equipment by the Norwegian government is a significant factor for the data center development. Sweden has been witnessing significant data center investment. The availability of renewable energy and the presence of favorable climatic condition are few of the major factors that attract new data center investments in the country.

Key Countries Profiled

Iceland

Denmark

Sweden

Finland

Key Vendor Analysis

The Nordic data center market is witnessing steady growth, with the high adoption of efficient and modular infrastructure solutions. The market has evolved over the years with multiple innovations focused on reducing power and water consumption and decreasing carbon dioxide emissions.

Moreover, the Nordic data center market has a strong presence of vendors across all three categories: electrical infrastructure, mechanical infrastructure, and general construction. Hyperscale data centers are likely to adopt lithium-ion batteries, natural gas generators, and intelligent PDUs during the forecast period. Infrastructure vendors are expected to offer innovative products during the forecast period, especially those products that help to reduce power wastage and improve efficiency.

Prominent Construction Contractors

AECOM

DPR Construction

HDR Architecture

MACE Group

Mercury Engineering

NCC

Skanska

Prominent Infrastructure Providers

ABB

Eaton

Rittal

Schneider Electric

STULZ

Vertiv

Prominent Investors

Amazon Web Service (AWS)

Equinix

Facebook

Hydro66

Interxion

Microsoft

Other Prominent Construction Contractors

AFEC International

Arup Group

Bravida

COWI

Dornan

ENACO

Etix Everywhere

Flex Enclosure

Granlund

Kirby Group

MTH GROUP

Ramboll

Red Engineering

Royal Haskoning DHV

SRV Group

Sweco

Other Prominent Infrastructure Providers

Airedale Air Conditioning

Alfa Laval

Caterpillar

Condair Group

Cummins

General Electric (GE)

Hewlett Packard Enterprise (HPE)

Huawei

KINOLT

Legrand

MTU On-Site Energy (Rolls-Royce Power Systems Ag)

Socomec Group

Systemair

Swegon

Other Prominent Investors

Advania Data Centers

Bahnhof

Basefarm (Orange Group)

Digiplex

Fortlax

Multigrid

Tieto

Key Market Insights Include

The report provides the following insights into the Nordic data center market for the forecast period 2019–2024.

1. It offers comprehensive insights into current industry trends, trend forecast, and growth drivers about the Nordic data center market.
2. The report provides the latest analysis of Nordic data center market share, growth drivers, challenges, and investment opportunities.
3. It offers a complete overview of market segments and the regional outlook of the

Nordic data center market.

4. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

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