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Data Center Market in Western Europe - Industry Outlook and Forecast 2020-2025

https://marketpublishers.com/r/D7743B339EDFEN.html
Date: April 2020
Pages: 343
Price: US$ 4,500.00 (Single User License)
ID: D7743B339EDFEN

Abstracts

COVID-19 is going to affect the data center market in Western Europe. A detailed analysis is included in the report.

The data center market in Western Europe by investment is expected to grow at a CAGR of over 1% during the period 2019–2025.

The implementation of the General Data Protection Regulations (GDPR) is expected to boost the data center market in Western Europe. As cloud-based services in Western Europe include hosting database, office software, financial and accounting, managing customer relationships and computer services, the demand for colocation, managed, and cloud-connectivity services will gain momentum. Several SMEs are looking to adopt cloud services such as PaaS and SaaS, and it is expected that more than 90% of SMEs in Western Europe will operate businesses through the cloud by 2024. The demand for hybrid infrastructure services is expected to grow at a CAGR of over 25% during the forecast period.

The increase in demand for data center services in Europe has led to the rise in merger and acquisition agreements. Also, data center construction is still growing at a significant rate, with large service providers investing in new construction and expansions in the European region. Besides, the data center colocation market in Europe is also witnessing increased interest from real estate and investment firms. The Europe data center market witnessed significant mergers and acquisition activities by US-based and APAC-based organizations. In 2019, QTS Realty Trust entered the market through the acquisition of TCN SIG Telehousing BV in the Netherlands. The market is also witnessing an increase in partnerships to develop and expand data center presence. For instance, Equinix partnered with GIC to invest over $1 billion for

expansion activities in Europe in 2019.

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

- Regulations driving Cloud Investments
- Growth in Colocation & Hyperscale Investments
- High Procurement of AI-based Servers
- Increase in Procurement of Green Energy
- Usage of Lithium-ion Batteries & Fuel Cells in Data Centers

Data Center Market in Western Europe: Segmentation

This research report includes detailed segmentation by IT infrastructure, electrical infrastructure, mechanical infrastructure, general construction, tier standards, and geography. The IT spending market is growing significantly YOY with Germany, Netherlands, the UK, France, and Ireland emerging as major markets. The growth is majorly driven by enterprises transforming from on-premise IT infrastructure to colocation and hyperscale and cloud operators. The server market witnessed strong growth in 2019. The procurement of ODM servers by hyperscale operators, cloud builders, and other enterprises has been a significant boost to the market. Several modern operators are involved in the adoption of server infrastructure that matches workload.

The demand for servers will continue to grow moderately as enterprises are likely to move to the cloud or colocation platforms during the forecast period. There will be an increase in demand for servers that support AI and ML application workloads. The market will also witness the adoption of AI servers as the market for high computing systems is increasing. The adoption of AI servers will increase during the forecast period in countries such as the UK, Germany, and the Netherland. There will be an increase in demand for servers with multicore processors, and the memory will grow as the average number of virtual machines per physical server continue to grow. Hyperscale operators are also expected to adopt advance storage mechanisms in new hyperscale facilities in the region.

The power systems market is expected to grow due to increasing greenfield construction, particularly greater than 10 MW. The penetration of lithium-ion battery systems is steadily growing in the market due to their reduced prices. The market is expected to look for integrated battery monitoring solutions along with infrastructure procurement at a low cost. The generators market will continue to grow because of the continuous construction of large and mega facilities. Several facilities in Western Europe adopt generators with low redundancy are they are supplied power from dual grids, with grid availability of over 99%. Also, there are facilities powered by renewable energy, where the need for redundant generators is low. The adoption of Diesel Rotary Uninterruptible Power Supply (DRUPS) systems is moderate in the market as they combine both battery and flywheel UPS topology and diesel generators to provide backup power during outages. These systems are highly reliable, efficient, and require less maintenance.

The favorable climatic conditions and the availability of renewable resources such as wind energy have helped data center operators to benefit from free cooling in the UK. Several facilities have adopted water-based cooling systems to cool their facilities. Also, the UK is the leading market for liquid-immersion cooling. Many data centers built in Germany are adopting free cooling to cool the facility. These facilities use redundant water and air-cooled system supported by free cooling with N+1 redundancy and CRAH units with N+1 configuration. In France, a majority of facilities are adopting free cooling solutions and several prefer water-based cooling using chillers. Facilities mostly prefer free cooling due to favorable climatic conditions. The facilities use CRAC units and chillers with free cooling in N+1 redundant configuration and cold aisle containment. The Netherlands market is witnessing significant growth in the adoption of free cooling systems. Enterprises are implementing redundant water and air-cooled systems supported by free cooling with N+1 redundancy and CRAH units with N+1 redundancy.

The data center market in Western Europe is expected to witness greenfield construction largely. High investments from hyperscale providers will become a major driver for revenue generation for general contractors and sub-contractors in the market. The UK market witnessed over 20 data center projects that were opened or under construction in 2019. Among them, about ten facilities were opened in 2019, and remaining facilities are likely to open by June 2020. Several facilities are built with multi-level security. There is an increasing demand for IP video surveillance systems in the market. APL, TPF Ing?nierie, and CAP INGELEC are some of the notable players providing construction services in France. In terms of physical security, there is a growing demand for IP video surveillance systems in the market. A majority of facilities developed in the Netherlands is expected to be greenfield development projects during the forecast period. Equinix, CyrusOne, Microsoft, Digital Realty, and Interxion carry out greenfield development in France.

Data centers of Tier II standards are designed with minimal redundancy. There are a few facilities in Western Europe that are Tier II certified based on designing and construction. In these facilities, redundancy is recognized between UPS and PDU systems. A majority of under-developed projects across the globe fall under the Tier III category. This trend is likely to continue in Western Europe during the forecast period, with many operators expected to move to Tier IV standards due to the growth in rack power density and critical data center applications. Germany is witnessing the highest number of Tier III facilities, followed by the UK, France, and the Netherland. Most facilities in France are Tier III certified by the Uptime Institute. The use of OCP infrastructure is likely to increase among colocation providers in the country during the forecast period.

Insights by Geography

The adoption of cloud services is one of the major drivers for the UK data center market. Several government departments are migrating to the cloud environment. Over the past eight years, the government has saved over $100 million in data center consolidation. With the UK likely to move out of the European Union, service providers are expected to face stringent rules and regulations regarding the storage and processing of data outside the country.

The IT and telecommunication industries are predominant adopters of cloud computing, followed by the transportation sector in the country. In Germany, NDC Data centre, Interxion, Digital Realty, Equinix, Global Switch, CyrusOne, NTT (e-Shelter), Etix Everywhere, and Colt DCS are the major investors invested in multiple facilities. In Germany, Frankfurt, Munich, Offenbach, and Hamburg witnessed investment in 2019.

Key Country

UK

Germany

France

Netherlands

Ireland

Others

Key Vendor Analysis

The Western Europe data center market continues to grow for greenfield, brownfield, and modular data center construction. The market is witnessing increased growth in the number of facilities, with high adoption of efficient and modular infrastructure solutions. It has a strong presence of vendors across all categories – IT, electrical, and mechanical infrastructure.

The adoption of ODM-based infrastructure solutions is increasing in penetration among enterprise operators in Europe. The deployment of OCP-ready data centers by colocation operators has aided this growth. HPE, Dell Technologies, Atos, IBM, Cisco, and Lenovo have a strong presence in the region.

Prominent Data Center Critical (IT) Infrastructure Providers

Arista

Atos

Broadcom

Cisco

Dell Technologies

Extreme Network

Hewlett Packard Enterprise (HPE)

Hitachi Vantara

Huawei

IBM

Inspur Group

Inventec

Juniper

Lenovo

NEC

NetApp

Oracle

Pure Storage

Quanta Cloud Technology (Quanta Computer)

Super Micro Computer

Wistron (Wiwynn)

Prominent Data Center Investors

3data

Apple

Aruba S.P.A

AWS (Amazon Web Services)

Bahnhof

Bulk Infrastructure

- Colt Data Centre Services (CCS)
- CyrusOne
- Digiplex
- Digital Realty
- Equinix
- Facebook
- Global Switch
- Google
- Interxion
- Microsoft
- Multigrid
- NDC Data Centers
- NTT Communications
- Scaleway Data Center
- STT GDC

Prominent Construction Services Providers

- AECOM
- Arup Group
- Bouygues

Cap Ingelec

DPR Construction

Etix Everywhere

Flex Enclosure

Future-tech

ISG

Jones Engineering Group

Kirby Group Engineering

KMCS

Linesight

LUPP Group

Mace Group

Mercury Engineering

M+W Group

NCC

Red Engineering

Skanska

SISK Group

Structure Tone

Winthrop

Prominent Infrastructure Providers

ABB

Airedale Air Conditioning

Alfa Laval

Asetek

Bosch Security Systems (Robert Bosch)

Caterpillar

Cummins

Delta Group

Eaton

Euro-Diesel (KINOLT)

Hitech Power Protection

KOHLER (SDMO)

Legrand

Nlyte Software

Piller Power Systems

Riello UPS

Rittal

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

Schneider Electric

Socomec

STULZ

Trane (Ingersoll Rand)

Vertiv

Key Market Insights Include

The report provides the following insights into the data center market in Western Europe during the forecast period 2020–2025.

1. It offers comprehensive insights into current industry trends, trend forecasts, and growth drivers about the data center market in Western Europe.
2. The report provides the latest analysis of share, growth drivers, challenges, and investment opportunities.
3. It offers a complete overview of segments and the regional outlook of the data center market in Western Europe.
4. The study offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

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Contents

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33 REPORT SUMMARY

33.1 Key Takeaways

34 QUANTITATIVE SUMMARY

34.1 Overall Market
34.2 Market By Infrastructure
34.3 Market By Support Infrastructure
34.4 Market by IT Infrastructure
34.5 Market by Electrical Infrastructure
34.6 Market by Mechanical Infrastructure
  34.6.1 Market by Cooling Systems
  34.6.2 Market by Cooling Technique
34.7 Market by General Construction
34.8 Market by Tier Standard
34.9 Regional Market by Investment
34.1 Regional Market by Area
34.11 Regional Market by Power Capacity
34.12 UK
  34.12.1 Market in UK
  34.12.2 Market by Infrastructure
34.13 Germany
  34.13.1 Market in Germany
  34.13.2 Germany by Infrastructure
34.14 Netherlands
  34.14.1 Market in Netherlands
  34.14.2 Netherlands by Infrastructure
34.15 France
  34.15.1 Market in France
  34.15.2 France by Infrastructure
34.16 Ireland
  34.16.1 Market in Ireland
  34.16.2 Ireland by Infrastructure
34.17 Other Western European Countries
  34.17.1 Market in Other Western European Countries
  34.17.2 Other Western European Country by Infrastructure

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35 APPENDIX

35.1 Abbreviations

List Of Exhibits

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List Of Tables

LIST OF TABLES

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