

# Hyperscale Data Center Market in Western Europe and Nordic - Industry Outlook and Forecast 2018-2023

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## Abstracts

Western Europe and Nordic hyperscale data center market is estimated to generate revenues of around \$29 billion by 2023, growing at a CAGR of approximately 10% during 2017-2023. The research report also offers market share analysis in terms of area (square feet) and power capacity (MW) during the forecast period.

Western Europe and Nordic hyperscale data center market is driven by investments by colocation providers such as Equinix, Digital Realty, CyrusOne (Zenium), NTT (e-shelter), T-Systems, and STT GDC (VIRTUS Data Center). The availability of 100% renewable energy, cheaper electricity cost, tax incentives, and the availability of land is propelling the growth of Western Europe and the Nordic market. The market research report provides in-depth market analysis and segmental analysis of Western Europe and Nordic hyperscale data center market by IT infrastructure, electrical infrastructure, mechanical infrastructure, general construction, and geography. The report considers the present scenario of Western Europe and Nordic hyperscale data center market along with its market dynamics for the period 2018-2023. It covers a detailed overview of several market growth enablers, restraints, and trends. The study covers both the demand and supply sides of the market. It also profiles and analyzes leading companies and several other prominent companies operating in Western Europe and Nordic hyperscale data center market.

### Hyperscale Data Center Market in Western Europe and Nordic – Dynamics

The increasing focus on data privacy and the establishment of stringent regulations that for data security is fueling the development of the hyperscale data center market in Western Europe & Nordic. In May 2018, the European Union established the General Data Protection Regulation (GDPR), which restricts datacenter operators to store

personal data outside the European Union. The implementation of GDPR will augment the development of hyperscale data center market in Western Europe & Nordic. The government agencies are offering tax breaks and other benefits to attract a maximum number of investments in the hyperscale data center market in Western Europe & Nordic. These tax incentives yield millions of dollars savings for hyperscale data center market operators. For instance, in 2017, Sweden reduced the electricity tax rate by 97% to promote facilities development in the region. Soon after Sweden, countries such as Norway, Finland, Denmark, and Iceland reduce their tax rates to attract new investments in the market. The innovations in IT and support infrastructure is fueling the growth of the hyperscale data center market in Western Europe & Nordic. The OPC community focuses on providing facility infrastructures such as servers, storage, and network devices, power, and cooling solutions in the market. Leading facility operators such as Facebook, Google, Microsoft, Tencent, Alibaba, and IBM are also members of OCP along with ODM suppliers such as QCT, and Wiwynn. The leading vendors are focusing on designing components that offer higher flexibility for specific or multiple related services that help in reducing power consumption.

#### Hyperscale Data Center Market in Western Europe and Nordic – Segmentation

This market research report includes a detailed segmentation of the market by IT infrastructure, electrical infrastructure, mechanical infrastructure, general construction, and geography. Western Europe and Nordic hyperscale data center market by IT infrastructure is segmented into the server, storage, and network. Server segment dominated the largest market share in 2017, growing at a CAGR of around 12% during the forecast period. The growing adoption of high-performance computing servers and hyper-converged infrastructure solutions is propelling the growth of this segment in the Western European and Nordic market. The increase in adoption of 25 GbE and 50 GbE switches is transforming the networking deployment in Western Europe and Nordic hyperscale data center market at the top of the rack.

The electrical infrastructure segment in Western Europe and Nordic hyperscale data center market is classified into UPS systems, generators, transfer switches & switchgear, rack PDU, and other electrical infrastructure. Other electrical infrastructure is the fastest growing segment in the market in 2018, growing at a CAGR of around 6% during the forecast period. The other electrical infrastructure segment consists of utility transformers, lighting equipment, power cables and panels, busbars, circuit breakers, and transient voltage surge suppressor (TVSS) systems. The innovations in the OPC community is leading to an increase in adoption of 12VDC UPS in the European market. Western Europe and Nordic hyperscale data center market by mechanical

infrastructure are categorized into cooling systems, rack, and other infrastructure. Cooling systems occupied the majority of the market share in 2017, growing at a CAGR of more than 4% during the forecast period. Indirect evaporative/adiabatic cooler and air/water-side economizers are the most commonly used cooling systems in the market.

The increasing number of vendors using open designs that facilitate flexible management of infrastructure based on the OCP design and other open communities will lead to the growth of the Nordic market. Leading vendors such as HPE are offering infrastructure to enterprise customers pre-installed with their rack products to attract new consumers in Western Europe and Nordic hyperscale data center market. The general construction segment in Western Europe and Nordic hyperscale data center market is divided into building development, installation and commissioning services, building design, physical security, and DCIM. DCIM is the fastest growing segment in the market in 2017, growing at a CAGR of around 12% during forecast period. Features such as controlling power consumption, improving efficiency, and increasing operational capabilities are driving the need for DCIM solutions in the market. The growing need to protect customer information and the implementation of data protection regulations is fueling the growth of this segment. The growing adoption of security systems with sensors that are integrated with the existing DCIM solutions for real-time remote monitoring benefits will revolutionize Western Europe and Nordic hyperscale data center market.

## Market Segmentation by Infrastructure

IT

Electrical

Mechanical

General construction

## Market Segmentation by IT Infrastructure

Server

Storage

Network

## Market Segmentation by Electrical Infrastructure

UPS systems

Generators

Transfer Switch and Switchgear

Rack PDU

Other Infrastructure

## Market Segmentation by Mechanical Infrastructure

Cooling Systems

Rack

Other Infrastructure

## Market Segmentation by General Construction

Building Development

Installation & Commissioning

Building Design

Physical Security

DCIM

## Hyperscale Data Center Market in Western Europe and Nordic – Geography

*Hyperscale Data Center Market in Western Europe and Nordic - Industry Outlook and Forecast 2018-2023*

Western Europe and Nordic hyperscale data center market by geography are segmented into Western Europe (the UK, Germany, France, Netherlands, Ireland, and others) and Nordic (Denmark, Norway, Sweden, and Finland & Iceland). Western Europe dominated the largest market share in 2017, growing at a CAGR of approximately 11% during the forecast period. The growing adoption of multiple cloud-based services among organizations across different industry verticals is driving the growth of the Western European region in the market. Leading service providers such as Apple, Facebook, Google, and Amazon Web Service (AWS) are investing in the development of new facilities in the Nordic region. The availability of renewable energy sources and investments in submarine cable projects will boost revenues in the Nordic hyperscale data center market. Kolos is all set to construct the largest facility in Norway with a power capacity of 1GW. Similarly, the Silent Partner Group of Companies consists of Power Systems Group International, Silent Partner International, Storespeed and PVD Modular is planning six hyperscale facilities three in Finland and three in Norway each comprising of 250 MW of power capacity.

## Market Segmentation by Geography

### Western Europe

UK

Germany

France

Netherlands

Ireland

Others

### Nordic

Denmark

Norway

Sweden

Finland & Iceland

### Key Vendor Analysis

Western Europe and Nordic hyperscale data center market are witnessing the entrance of several cloud service providers intensifying the competition. The establishment of stringent data regulations will encourage vendors to innovate their product portfolio in the market. The penetration of open source infrastructure solutions such as ODM infrastructure will increase the level of competition in the market. The emergence of 200G and 400G will drive the demand for hyper-converged and hyperscale infrastructure in Western Europe and Nordic hyperscale data center market.

The major vendors in Western Europe and Nordic market are:

Apple

Amazon Web Service (AWS)

Aruba S.P.A

Facebook

Google

Microsoft

OVH

IBM

Other prominent vendors include Alibaba, CyrusOne (Zenium), Digital Realty, EcoDataCenter, Equinix, Global Switch, Hydro66, Iliad Data Center, INFINITY SDC, Kao Data ( Harlow Operations Ltd), NTT Communications (e-shelter), SAP, ST Telemedia Global Data Centres (STT GDC), T-Systems (Deutsche Telekom), and Verne Global.

Key market insights include

1. The analysis of Western Europe and the Nordic hyperscale data center market provides market size and growth rate for the forecast period 2018-2023.
2. It offers comprehensive insights on current industry trends, trend forecast, and growth drivers about Western Europe and Nordic hyperscale data center market.
3. The report provides the latest analysis of market share, growth drivers, challenges, and investment opportunities.
4. It offers a complete overview of market segments and the regional outlook of Western Europe and Nordic hyperscale data center market.
5. The report offers a detailed overview of the vendor landscape, competitive analysis, and key market strategies to gain competitive advantage.

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