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Netherlands Data Center Market - Investment Analysis and Growth Opportunities 2021-2026

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Abstracts

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

Netherlands Data Center Market Size Will Witness Investments of USD 4.5 Billion By 2026, Growing at a CAGR of 6% During 2021–2026.

The Netherlands is a mature data center market in Western Europe and is a part of the FLAP markets, acting as a digital gateway to Europe. The country's data center landscape is thriving due to increased digitalization, connectivity, and sustainable development of data centers. The data center market in the Netherlands includes about 30 unique third-party data center service providers operating over 80 facilities. Also, the country is witnessing further investments in nearly 15 facilities that are expected to be operational in the next 2–3 years. The COVID-19 pandemic has been a major boost to the Netherlands data center market, with increased colocation uptake by existing customers, as well as increased investment in new data centers and cloud regions. In the Netherlands, the growth in digital infrastructure, artificial intelligence, and IoT in Netherlands is attracting cloud and colocation service providers to invest in the data center market.

The report considers the present scenario of the Japanese data center market and its market dynamics for the forecast period 2021?2026. It covers a detailed overview of several growth enablers, restraints, and trends in the market. The study includes the demand and supply aspect of the market.

KEY HIGHLIGHTS OF THE REPORT:

The implementation of 5G networks will increase the usage of new class ethernet switches among data centers in the Netherlands.

The market is likely to increase the deployment of OCP-Ready colocation facilities, which are likely to increase the adoption of open computing hardware.

The adoption of UPS systems with a capacity of over 500 KW in N+1 or 2N configuration is likely to witness adoption in the Netherlands data center market.

In terms of electrical infrastructure, generators are primarily used in N+1 redundant configuration.

Growing awareness of end-to-end power monitoring in the facilities will experience strong adoption of monitored and metered/switched PDUs.

Power fluctuations and outages in the facilities will increase the installation of 2N redundant PDUs at a high capacity.

The use of direct free cooling solutions is likely to boost the adoption of duct systems in data centers. Also, evaporative and water-based economizer solutions are supporting the adoption of pipes with N+N redundancy.

The increase in greenfield projects will be a strong revenue contributor for local architectural firms.

NETHERLANDS DATA CENTER MARKET INSIGHTS

Over 90% of organizations in the Netherlands have adopted cloud technology, with BFSI, healthcare, education, hospitality, government, and transport sectors topping the list.

The COVID-19 pandemic has been a significant contributor to cloud adoption in the Netherlands, with over 55% of the population working from home, thereby driving cloud adoption.

The public cloud revenue expects to reach over USD 10 billion by 2026, with SaaS emerging as the leading revenue contributor.

Around 98% of Dutch households have Internet access, making the Netherlands the most connected country in Europe.

Excellent fiber connectivity, availability of renewable energy and free cooling solutions, developed telecom infrastructure, and the availability of district heating has made the Netherlands a favorable location for data center development.

Government initiatives expect to increase the digitalization of the consumer and enterprise environment through technology such as 5G, AI, virtual reality, and augmented reality.

NETHERLANDS DATA CENTER MARKET VENDOR LANDSCAPE

Arista Networks, Atos, Broadcom, Cisco Systems, Dell Technologies, Hewlett Packard Enterprise (HPE), Huawei Technologies, IBM, Lenovo, MiTAC Holdings, NetApp, and Wistron are the leading the IT infrastructure market in the Netherlands. The IT infrastructure adoption is growing due to the development of data centers and expansions of cloud regions by hyperscale data center operators. Global cloud service providers such as Microsoft, Facebook, and Google are expanding their presence with the opening of cloud regions. These providers already have a strong physical presence in major areas such as Ireland, Belgium, Denmark, the Netherlands, and Sweden.

IT Infrastructure Providers

Arista Networks

Atos

Broadcom

Cisco Systems

Dell Technologies

Hewlett Packard Enterprise (HPE)

Huawei Technologies

IBM

Lenovo

MiTAC Holdings

NetApp

Wistron (Wiwynn)

Construction Service Providers

Arup

BENTHEM CROUWEL ARCHITECTS

Deerns

Dornan

DPR Construction

HDR (Hurley Palmer Flatt)

Kirby Group Engineering

Linesight

Mace Group

Mercury

RED

Royal HaskoningDHV

Turner & Townsend

Winthrop Engineering and Contracting

Support Infrastructure Providers

ABB

Caterpillar

Climaveneta (Mitsubishi Electric)

Cummins

Delta Electronics

Eaton

KOHLER-SDMO

Legrand

Riello UPS

Rittal

Rolls-Royce Power Systems

Schneider Electric

Socomec

STULZ

Vertiv Group

Data Center Investors

CyrusOne

Cyxtera Technologies

Dataplace

Digital Realty

EdgeConnex

Equinix

Global Switch

Google

Interconnect

NorthC Datacenters

Quality Technology Services (QTS) Realty Trust

Serverius

Worldstream

REPORT COVERAGE:

This report offers analysis on the Netherlands Data Center market share and elaborative analysis of the existing and upcoming facilities, datacenter investments in terms of IT, electrical, mechanical infrastructure, general construction, and geography. It discusses market sizing and estimation for different segments with respect to the investment in the facilities. The segmentation includes:

EXISTING VS. UPCOMING DATA CENTERS

Existing Facilities in the region (Area and Power Capacity)

Amsterdam

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Rotterdam

Groningen

Almere

Dronten

Eemshaven

Eindhoven

Hoofddorp

Naaldwijk

Deventer

Middenmeer

Leeuwarden

Utrecht

Zwolle

List of Upcoming Facilities in the region (Area and Power Capacity)

NETHERLANDS DATA CENTER INVESTMENT COVERAGE

Infrastructure Type

IT Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

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- General Construction
- IT Infrastructure
  - Server
  - Storage
  - Network
- Electrical Infrastructure
  - Uninterruptible Power Supply (UPS)
  - Generators
  - Transfer Switches and Switchgears
  - PDUs
  - Other Electrical Infrastructure
- Mechanical Infrastructure
  - Cooling Systems
  - Rack Cabinets
  - Other Mechanical Infrastructure
- Cooling Systems
  - CRAC & CRAH Units
  - Chillers
  - Cooling Towers, & Condensers, and Dry Coolers

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- Economizers & Evaporative Coolers
- Other Cooling Units
- General Construction
  - Building Development
  - Installation & Commissioning Services
  - Building and Engineering Design
  - Physical Security
  - DCIM
- Tier Segments
  - Tier I & Tier II
  - Tier III
  - Tier IV
- Geography
  - Amsterdam
  - Other Cities

WHY SHOULD YOU BUY THIS RESEARCH?

Market size available in the area, power capacity, investment, and colocation revenue.

An assessment of the Netherlands data center investment in the market by colocation, hyperscale, and enterprise operators

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Data center investments in terms of area (square feet) and power capacity (MW) across cities in the Netherlands

A detailed study of the existing Netherlands data center market landscape, an in-depth industry analysis, and insightful predictions about the Netherlands data center market size during the forecast period

Snapshot of existing and upcoming third-party facilities in the Netherlands

- Facilities Covered (Existing): 78
- Facilities Identified (Upcoming): 23
- Coverage: Over 14 Cities
- Existing vs. Upcoming (Data Center Area)
- Existing vs. Upcoming (IT Load Capacity)

Data center colocation market in the Netherlands

- Market Revenue & Forecast (2020-2026)
- Retail Colocation Pricing
- Wholesale Colocation Pricing

Classification of the Netherlands data center market investments into multiple segments and sub-segments (IT, power, cooling, and general construction services) with market sizing and forecast

A comprehensive analysis of the latest trends, growth rate, potential opportunities, and growth restraints, and future prospects for the data center market

Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the market

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A transparent research methodology and the analysis of the demand and supply aspect of the market

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