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Western Europe and Nordic Data Center Market - 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 Western Europe and Nordic Data Center Market Report

The Western Europe and Nordic data center market by investment is expected to grow at a CAGR of approx. 4% during the period 2020–2026.

The market witnessed supply chain-related challenges in Q1 and Q2 2020 for both IT infrastructure and support infrastructure providers. However, these recovered in Q3 2020. The market growth was aided by previously announced projects and expansions of facilities in a few locations where data centers were deemed essential services. A majority of the demand for data center services is contributed by cloud-based service providers.

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

5G boosting Edge Data Center Investments

Growing Procurement of Renewable Energy

Innovative UPS Battery Technology

Increased Adoption of 200/400 GBE Switch Ports

The study considers the present scenario of Western Europe and Nordic 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.

Western Europe And Nordic Data Center Market Segmentation

The Western Europe and Nordic data center market research report includes a detailed segmentation by IT infrastructure, electrical infrastructure, mechanical infrastructure, cooling technique, cooling systems, general construction, tier standards, geography. In 2020, the IT infrastructure adoption among newly established and existing data centers grew significantly. Germany is the leading market in the IT infrastructure spending, followed by the UK, the Netherlands, France, and Ireland. The emergence of software-defined architectures and converged infrastructure expects to drive the IT infrastructure solutions market in Western Europe. Similarly, the increasing adoption of cloud computing services in the Nordic region leads to increased procurement of IT infrastructure components. Finland, Sweden, and Denmark are the leading contributors to cloud adoption, with 50% of enterprises using cloud computing services.

Several Western Europe facilities have adopted flexible designs to facilitate dual power feeds, 2N redundant UPS and PDU systems, and N+1 generators. The growth of lithium-ion UPS systems is aided by benefits such as reducing the OPEX through lower maintenance costs and decreasing UPS battery failure chances. Vendors are continuously coming out with innovative UPS solutions to boost efficiency and reduce cost. The construction of large and mega data center facilities in Western Europe and Nordics is likely to aid the generators market. DRUPS solutions are likely to witness high demand among data centers, with multiple modules having the capacity of up to 2 MW in N+N redundant configurations.

Several Western Europe data centers support free cooling systems that include adiabatic coolers, evaporative coolers, and free cooling chiller systems. Water-based cooling includes water-treatment plants and systems that can aid water consumption by up to 20%. Most operators procure 45U–52U rack cabinets. The procurement of 42U racks is declining in the market.

Western Europe is the most active market for data center construction in Europe. The increase in data center demand has increased revenue opportunities for contractors and sub-contractors in the industry. A significant data center construction in the region is managed by Europe-based construction service providers, including architects and

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engineering firms. However, the non-availability of skilled workforce to handle multiple hyperscale projects is a major challenge for several contractors in the region. Hyperscale data center development will be a major boost for contractors and sub-contractors operating in the Nordic region. Most hyperscale projects are built in collaboration with global data center construction contractors and sub-contractors.

Western Europe and Nordic data center market size by tier standards is expected to reach approx. USD 12 billion by 2026, growing at a CAGR of over 5%. There are 112 Tier III certified facilities in Western Europe and Nordic region, with the UK, Spain, Italy, and Lithuania leading the list. Most new data centers are designed to be of Tier III standards with a minimum of N+1 redundancy. The European region hosts around 50 facilities that are Tier IV certified facilities. Denmark, France, Greece, Italy, Luxembourg, the Netherlands, Norway, Spain, Switzerland, and the UK have several Tier IV facilities. These facilities are equipped with at least 2N+1 redundancy in the infrastructure that makes the facility fault-tolerant, with UPS systems and PDUs having 2N+2 redundancy. Facebook, Apple, Google, and Microsoft are major hyperscale developers.

By IT Infrastructure

- Servers
- Storage
- Network

By Electrical Infrastructure

- UPS Systems
- Generators
- Transfer Switches and Switchgears
- PDUs
- Other Electrical Infrastructures

By Mechanical Infrastructure

- Cooling Systems
  - CRAC & CRAH Units
  - Chiller Units
  - Cooling Towers, Dry Coolers, & Condensers
  - Economizers and Evaporative Coolers, and Other Units
  - Racks
  - Other Mechanical Infrastructure
- 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

The Western Europe data center market is likely to witness growth due to the adoption of cloud services among SMEs, with the increased interest in the digitalization of businesses. The demand for smart devices, coupled with growing internet penetration, will fuel the growth and corresponding infrastructure in the region. Western Europe data centers are built to support OCP rack infrastructure solutions. The UK, the Netherlands, Germany, and France are the leading destinations for data center development.

By Geography

- Western Europe
  - UK
  - Germany
  - France
  - Netherlands
  - Ireland
  - Belgium
  - Switzerland
  - Luxembourg

Italy

Spain

Other Western European Countries

Nordic

Denmark

Norway

Sweden

Finland & Iceland

INSIGHTS BY VENDORS

Western Europe and Nordic data center market consists of several IT infrastructure, electrical, mechanical, and general construction service providers. Huawei Technologies, Super Micro Computers, Atos, and NEC are the major IT infrastructure vendors. Atos experiences strong demand for its infrastructure solutions in the Western Europe and Nordics markets. The data center market by electrical infrastructure has become competitive due to increased interest displayed by operators in procuring energy-efficient infrastructure solutions. Several data center requirements from service operators prompt vendors to develop innovative products with over 90% efficiency in performing data center operations and reducing OPEX by up to 50%. The Western Europe and Nordics data center market comprises several local and global construction contractors, architectural and engineering firms, physical security vendors, and DCIM solutions providers. Revenue opportunities for vendors are high due to the growing construction of hyperscale data centers.

Key Data Center Critical (IT) Infrastructure Providers

Arista Networks

Atos

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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

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Wistron (Wiwynn)

Key Data Center Support Infrastructure Providers

ABB

Airedale Conditioning Systems

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

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Rittal

Riello Elettronica (Riello UPS)

Schneider Electric

STULZ

Socomec

Trane Technologies

Vertiv Group

Key Data Center Investors

acens Technologies

Adam

Aruba

Bahnhof

CyrusOne

Colt Data Center Services (Colt DCS)

Digital Realty

DigiPlex

DATA4 Smart Data Centers

Equinix

Echelon Data Centers

EcoDataCenter

Facebook

Google

Global Switch

GlobalConnect

Green Mountain

Iron Mountain

Microsoft

Nexica - Econocom Group

NTT Global Data Centers

QTS Realty Trust

VIRTUS Data Centres

Telecom Italia Sparkle

T5 Data Centers

Vantage Data Centers

Key Construction Constructors

AECOM

Arup Group

Bouygues Construction

CapIngelec

DPR Construction

Deerns

Fluor Corporation

Future-Tech

HDR Architecture

ISG

Jones Engineering

Kirby Group

Linesight

Mercury Engineering

Mace Group

M+W Group (Exyte)

Metnor Construction

RED-Engineering

Structure Tone

Winthrop Engineering and Contracting

KEY QUESTIONS ANSWERED

1. How big is Western Europe and Nordic data center market?
2. What are the upcoming industry applications for data centers?

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3. Which are the major IT companies operating in the Western Europe and Nordic data center market?
4. What are the top trends driving the Western Europe and Nordic data center market?
5. Which segments are expected to grow at the fastest CAGR during the forecast period?
6. How does COVID-19 affect the data center market landscape?

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