

European Data Center Colocation Market: Analysis By Type (Retail and Wholesale), By Enterprise Size (Large Enterprises and Small and Medium Enterprises), By End-Use (IT and Telecom, BFSI, Healthcare, Retail, and Others), By Region Size and Trends with Impact of COVID-19 and Forecast up to 2027

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Abstracts

The European data center colocation market in 2021 was valued at US\$14.03 billion. The market is expected to reach US\$29.37 billion by 2027. The process of renting a large amount of physical space, internet bandwidth, and network by a service provider within an existing data center to deploy the service provider's own data center to store massive amounts of data and manage server operations for large businesses is known as data center colocation.

Additionally, the adoption of cloud-based services by enterprises and social media by consumers are driving the construction of hyperscale data centers in Europe by companies such as Facebook, Google, Amazon Web Services (AWS), and Microsoft. Therefore, the growing adoption of cloud services in Europe is predicted to help in the expansion of data center colocation market in the forthcoming years. The market is expected to grow at a CAGR of approx. 13.1% during the forecasted period of 2022-2027.

Market Segmentation Analysis:

By Type: The report provides the bifurcation of the market into two segments based on the type: Retail Colocation and Wholesale Colocation. In 2021, retail colocation held a major share in the market. The segment is expected to grow at the highest CAGR in the

forthcoming years as it offers flexibility in terms of IT infrastructure, which benefits small and medium-sized enterprises (SMEs), which increase its market share in the colocation of data centers across the region.

By Enterprise Size: The report further provides the segmentation based on the enterprise size: Large Enterprises and Small and Medium Enterprises (SMEs). The large enterprises held the highest share in the market. The market's expansion is aided by the growing adoption of colocation services among major cloud service providers and hyperscalers in the region.

By End-Use: The report further provides the segmentation based on the end-use: IT & Telecom, BSFI, Healthcare, Retail and Others. The IT & Telecom held the majority share in the market on account of rising demand for additional data storage capacity as a result of increased adoption of smartphones, laptops, tablets, gaming consoles, and other gadgets and benefits provided by data center colocation providers to the IT industry such as speed of deployment, waste and energy efficiency, and scalability.

By Region: The report provides insight into the data center colocation market based on the regions namely Germany, the UK, France, Russia, Italy, and the Rest of Europe. Germany held the major share in the market owing to digital transformation strategies, the adoption of cloud computing by enterprises, IoT, AI, implementation of GDPR, and COVID-19. The German market is further divided based on type namely, Retail Colocation and Wholesale Colocation.

In the UK data center industry, London is a major location for investment, with regions like Manchester, Slough, and Birmingham expecting to see significant investment in the years to come.

Market Dynamics:

Growth Drivers: The European data center colocation market has been growing over the past few years, due to factors such as soaring demand for data center colocation services among small business, surging number of IOT connected devices and big data, rising costs of operating data center, mounting penetration of internet, and many other factors. The expansion of the telecommunications network and the rise in the number of new businesses centered on information technology have led to an increase in the demand for more rapid data processing and storage capacities. This is resulting in the adoption of digital technology and expansion of business operations by several small and medium enterprises (SMEs) across European economies.

Challenges: However, the market has been confronted with some challenges specifically, dearth of qualified labor, high initial and maintenance costs, etc.

Trends: The market is projected to grow at a fast pace during the forecast period, due to various latest trends such as growing execution of artificial intelligence, increasing adoption of cloud services, expansion of IT and telecommunications industry, etc. The adoption of cloud-based services by enterprises and social media by consumers are driving the construction of hyperscale data centers in Europe by companies such as Facebook, Google, Amazon Web Services (AWS), and Microsoft. Therefore, the growing adoption of cloud services in Europe is predicted to help in the expansion of data center colocation market in the forthcoming years.

Impact Analysis of COVID-19 and Way Forward:

Data center colocation market has benefited from the pandemic as data center colocation technologies help enterprises manage the rising needs of internet traffic. The demand for data centers grew significantly due to the pandemic and subsequent lockdowns across Europe, with a majority of the region's workforce shifting to remote working. In addition, companies from various industries came with more data space requirements to deploy their operations digitally on virtual space during the pandemic. The demand for colocation services led to strong utilization of existing data center space and drove revenues of service providers by over 10% in the initial two quarters.

Competitive Landscape:

The European data center colocation market is highly fragmented, with significant players in end-user industries maintaining their data centers due to the ease of managing an IT staff and many other customizations.

The key players in the European data center colocation market are:

Equinix, Inc.

Verizon Partner Solutions

AT&T Inc. (AT&T Intellectual Property)

Cisco Systems, Inc.

Iron Mountain Incorporated

Digital Realty Trust, Inc.

NTT Communications Corporation

Cyxtera Technologies Inc.

CyrusOne, Inc.

Global Switch Limited

Telehouse International Corporation of Europe Ltd.

Verne Global

AtNorth

Some of the strategies among key players in the market for data center colocations are mergers, acquisitions, and collaborations. For instance, in April 2022, NTT Ltd announced significant advancements to its Managed Campus Networks service, a portfolio of consulting, technical, and managed services designed to deliver a seamlessly integrated campus network in the most demanding head office, branch, and manufacturing environments. In February 2022, Equinix Inc., had inaugurated MU4, a brand-new International Business Exchange (IBX) building, at Dywidagstrasse 10 in Aschheim. More than 2,250 square meters (24,200 square feet) of colocation space and more than 825 cabinets are available in the first phases of MU4.?

Contents

1. EXECUTIVE SUMMARY

2. INTRODUCTION

2.1 Data Center Colocation: An Overview

2.1.1 Introduction to Data Center Colocation

2.1.2 Advantages of Data Center Colocation

2.2 Data Center Colocation Segmentation: An Overview

2.2.1 Data Center Colocation Segmentation

3. EUROPEAN MARKET ANALYSIS

3.1 European Data Center Colocation Market: An Analysis

3.1.1 European Data Center Colocation Market: An Overview

3.1.2 European Data Center Colocation Market by Value

3.1.3 European Data Center Colocation Market by Type

3.1.4 European Data Center Colocation Market by Enterprise Size

3.1.5 European Data Center Colocation Market by End Use

3.1.6 European Data Center Colocation Market by Region

3.2 European Data Center Colocation Market: Type Analysis

3.2.1 European Data Center Colocation Market by Type: An Overview

3.2.2 European Retail Data Center Colocation Market by Value

3.2.3 European Wholesale Data Center Colocation Market by Value

3.3 European Data Center Colocation Market: Enterprise Size Analysis

3.3.1 European Data Center Colocation Market by Enterprise Size: An Overview

3.3.2 European Large Enterprises Data Center Colocation Market by Value

3.3.3 European Small and Medium Enterprises Data Center Colocation Market by Value

3.4 European Data Center Colocation Market: End Use Analysis

3.4.1 European Data Center Colocation Market by End Use: An Overview

3.4.2 European IT & Telecom Data Center Colocation Market by Value

3.4.3 European BFSI Data Center Colocation Market by Value

3.4.4 European Healthcare Data Center Colocation Market by Value

3.4.5 European Retail Data Center Colocation Market by Value

3.4.6 European Others Data Center Colocation Market by Value

4. EUROPEAN REGIONAL MARKET ANALYSIS

- 4.1 Germany Data Center Colocation Market: An Analysis
 - 4.1.1 Germany Data Center Colocation Market: An Overview
 - 4.1.2 Germany Data Center Colocation Market by Value
 - 4.1.3 Germany Data Center Colocation Market by Type
 - 4.1.4 Germany Data Center Colocation Type Market by Value
 - 4.1.5 Germany Data Center Colocation Market by Enterprise Size
 - 4.1.6 Germany Data Center Colocation Enterprise Size Market by Value
 - 4.1.7 Germany Data Center Colocation Market by End Use
 - 4.1.8 Germany Data Center Colocation End Use Market by Value
- 4.2 The UK Data Center Colocation Market: An Analysis
 - 4.2.1 The UK Data Center Colocation Market: An Overview
 - 4.2.2 The UK Data Center Colocation Market by Value
 - 4.2.3 The UK Data Center Colocation Market by Type
 - 4.2.4 The UK Data Center Colocation Type Market by Value
 - 4.2.5 The UK Data Center Colocation Market by Enterprise Size
 - 4.2.6 The UK Data Center Colocation Enterprise Size Market by Value
- 4.3 France Data Center Colocation Market: An Analysis
 - 4.3.1 France Data Center Colocation Market: An Overview
 - 4.3.2 France Data Center Colocation Market by Value
- 4.4 Russia Data Center Colocation Market: An Analysis
 - 4.4.1 Russia Data Center Colocation Market: An Overview
 - 4.4.2 Russia Data Center Colocation Market by Value
- 4.5 Italy Data Center Colocation Market: An Analysis
 - 4.5.1 Italy Data Center Colocation Market: An Overview
 - 4.5.2 Italy Data Center Colocation Market by Value
- 4.6 Rest of Europe Data Center Colocation Market: An Analysis
 - 4.6.1 Rest of Europe Data Center Colocation Market: An Overview
 - 4.6.2 Rest of Europe Data Center Colocation Market by Value

5. IMPACT OF COVID-19

- 5.1 Impact of COVID-19 on Data Center Colocation Market
 - 5.1.1 General Impact
 - 5.1.2 Impact on Data Center Service Providers
 - 5.1.3 Impact on Supply Chain & Investments
 - 5.1.4 Post COVID-19 Scenario

6. MARKET DYNAMICS

6.1 Growth Driver

- 6.1.1 Soaring Demand for Data Center Colocation Among Small Businesses
- 6.1.2 Surging Number of IOT Connected Devices
- 6.1.3 Rising Cost of Operating a Data Center
- 6.1.4 Mounting Penetration of Internet
- 6.1.5 Growth In Sustainable Initiatives
- 6.1.6 Rising Investments in Colocation Data Center

6.2 Challenges

- 6.2.1 Dearth of Qualified Labor
- 6.2.2 High Initial and Maintenance Costs
- 6.2.3 Stringent Government Regulations And Security Requirements

6.3 Market Trends

- 6.3.1 Growing Execution of Artificial Intelligence
- 6.3.2 Increasing Adoption of Cloud Services
- 6.3.3 Rapid Digitalization
- 6.3.4 Expansion in IT & Telecom Industry
- 6.3.5 Emergence of 5G Technology and Its Services

7. COMPETITIVE LANDSCAPE

7.1 Global Data Center Colocation Market Players: Merger & Acquisition Activity

8. COMPANY PROFILES

8.1 Equinix, Inc.

- 8.1.1 Business Overview
- 8.1.2 Operating Region
- 8.1.3 Business Strategy

8.2 Verizon Partner Solutions

- 8.2.1 Business Overview
- 8.2.2 Operating Segment
- 8.2.3 Business Strategy

8.3 AT&T Inc. (AT&T Intellectual Property)

- 8.3.1 Business Overview
- 8.3.2 Operating Segment
- 8.3.3 Business Strategy

8.4 Cisco Systems, Inc.

- 8.4.1 Business Overview

- 8.4.2 Operating Segment
- 8.4.3 Business Strategy
- 8.5 Iron Mountain Incorporated
 - 8.5.1 Business Overview
 - 8.5.2 Operating Segment
 - 8.5.3 Business Strategy
- 8.6 Digital Realty Trust, Inc.
 - 8.6.1 Business Overview
 - 8.6.2 Business Strategy
- 8.7 NTT Communications Corporation
 - 8.7.1 Business Overview
 - 8.7.2 Business Strategy
- 8.8 Cyxtera Technologies Inc.
 - 8.8.1 Business Overview
 - 8.8.2 Business Strategy
- 8.9 CyrusOne, Inc.
 - 8.9.1 Business Overview
 - 8.9.2 Business Strategy
- 8.10 Global Switch Limited
 - 8.10.1 Business Overview
 - 8.10.2 Business Strategy
- 8.11 Telehouse International Corporation of Europe Ltd.
 - 8.11.1 Business Overview
 - 8.11.2 Business Strategy
- 8.12 Verne Global
 - 8.12.1 Business Overview
 - 8.12.2 Business Strategy
- 8.13 AtNorth
 - 8.13.1 Business Overview
 - 8.13.2 Business Strategy

List Of Figures

LIST OF FIGURES

Figure 1: Advantages of Colocation Data Centers

Figure 2: Data Center Colocation Segmentation

Figure 3: European Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 4: European Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 5: European Data Center Colocation Market by Type; 2021 (Percentage, %)

Figure 6: European Data Center Colocation Market by Enterprise Size; 2021
(Percentage, %)

Figure 7: European Data Center Colocation Market by End Use; 2021 (Percentage, %)

Figure 8: European Data Center Colocation Market by Region; 2021 (Percentage, %)

Figure 9: European Retail Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 10: European Retail Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 11: European Wholesale Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 12: European Wholesale Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 13: European Large Enterprises Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 14: European Large Enterprises Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 15: European Small and Medium Enterprises Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 16: European Small and Medium Enterprises Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 17: European IT & Telecom Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 18: European IT & Telecom Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 19: European BFSI Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 20: European BFSI Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 21: European Healthcare Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 22: European Healthcare Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 23: European Retail Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 24: European Retail Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 25: European Others Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 26: European Others Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 27: Germany Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 28: Germany Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 29: Germany Data Center Colocation Market by Region; 2021 (Percentage, %)

Figure 30: Germany Data Center Colocation Type Market by Value; 2017-2021 (US\$ Billion)

Figure 31: Germany Data Center Colocation Type Market by Value; 2022-2027 (US\$ Billion)

Figure 32: Germany Data Center Colocation Market by Enterprise Size; 2021 (Percentage, %)

Figure 33: Germany Data Center Colocation Enterprise Size Market by Value; 2017-2021 (US\$ Billion)

Figure 34: Germany Data Center Colocation Enterprise Size Market by Value; 2022-2027 (US\$ Billion)

Figure 35: Germany Data Center Colocation Market by Region; 2021 (Percentage, %)

Figure 36: Germany Data Center Colocation End Use Market by Value; 2017-2021 (US\$ Billion)

Figure 37: Germany Data Center Colocation End Use Market by Value; 2022-2027 (US\$ Billion)

Figure 38: The UK Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 39: The UK Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 40: The UK Data Center Colocation Market by Type; 2021 (Percentage, %)

Figure 41: The UK Data Center Colocation Type Market by Value; 2017-2021 (US\$ Billion)

Figure 42: The UK Data Center Colocation Type Market by Value; 2022-2027 (US\$ Billion)

Figure 43: The UK Data Center Colocation Market by Enterprise Size; 2021 (Percentage, %)

Figure 44: The UK Data Center Colocation Enterprise Size Market by Value; 2017-2021 (US\$ Billion)

Figure 45: The UK Data Center Colocation Enterprise Size Market by Value; 2022-2027 (US\$ Billion)

Figure 46: France Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 47: France Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 48: Russia Data Center Colocation Market by Value; 2017-2021 (US\$ Million)

Figure 49: Russia Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 50: Italy Data Center Colocation Market by Value; 2017-2021 (US\$ Million)

Figure 51: Italy Data Center Colocation Market by Value; 2022-2027 (US\$ Million)

Figure 52: Rest of World Data Center Colocation Market by Value; 2017-2021 (US\$ Billion)

Figure 53: Rest of World Data Center Colocation Market by Value; 2022-2027 (US\$ Billion)

Figure 54: Colocation Data Center Supply in Europe; Q4 2019–Q1 2021 (Megawatts)

Figure 55: Total Number of Internet of Things (IoT) Connected Devices in Europe; 2019-2027 (Billion)

Figure 56: Estimated Total Development Cost of Data Center; (US\$)

Figure 57: Number of Internet Users in Europe; 2020–2025 (Million)

Figure 58: European Artificial Intelligence Market; 2019-2025 (US\$ Billion)

Figure 59: European Cloud Computing Market; 2021-2030 (US\$ Billion)

Figure 60: Digitalization Level of The European Union, by country; 2022 (Index Score)

Figure 61: Equinix, Inc. Revenue by Operating Region; 2021 (Percentage, %)

Figure 62: Verizon Partner Solutions Revenue by Segment; 2021 (Percentage, %)

Figure 63: AT&T Inc. Operating Revenue by Segment; 2021 (Percentage, %)

Figure 64: Cisco Systems, Inc. Revenue by Operating Segment; 2021 (Percentage, %)

Figure 65: Iron Mountain Incorporated Total Revenues by Segment; 2021 (Percentage, %)

Table 1: Global Data Center Colocation Market Players: Merger & Acquisition Activity

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