

# Europe Middle East and Africa Colocation Market - Forecasts from 2020 to 2025

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## Abstracts

Europe Middle East and Africa (EMEA) data center colocation market was valued at US\$14.861 billion in 2019 and is projected to expand at a CAGR of 12.45% over the forecast period to reach US\$30.041 billion by 2025. The colocation market is gaining momentum on account of increased spending for the enterprises in the region. Information and communications technology is the heart of the digital economy, it is estimated that increasing investments in information and communications technology will positively impact the colocation market in the coming years. Increasing investment in information and communication technology is expected to be one of the prime factors driving the market in the region. However, rising security concerns in the region are anticipated to hinder the growth of the market during the forecast period.

### Market scenario in Europe

One of the main factors augmenting the growth of the market in the region is the growing focus on data privacy and regulation in countries like Germany and the United Kingdom. Even companies operating in the entertainment and media, healthcare, communication, and government sectors are increasingly outsourcing their IT infrastructure needs as well as for opting for colocation space to focus on their core business operations and reduce operating costs. Rising investment expenditure by Governments as well as business enterprises in the ICT sector across the region is further augmenting the colocation market. In fact, countries like the Netherlands and UK are considered as one of the most wired countries which is a prime factor for the growth of information and communications technology companies across the region. Additionally, investments in the infrastructure in the ICT sector are estimated to further assist the market growth opportunities owing to the increasing investments that will promote the development of infrastructure as well as the services related to the ICT

sector. Also, the growth of large enterprises in the region has been driving with it the adoption of cloud computing among them. Growing demand for cloud storage coupled with the continuous focus of enterprises towards data security is fueling the popularity of data center colocation, thus driving their market growth. Furthermore, the rising number of mobile data plans and the growing smartphone industry will require telecom companies to further increase the investment in acquiring data center services in order to adapt and manage the latest server technology. According to the World Bank, mobile cellular subscription per 100 people in France has increased from 91.898 in 2010 to 108.408 in 2018.

### Trends in the Middle East and Africa

In the Middle East and Africa, Saudi Arabia is the biggest economy and is also estimated to be the biggest ICT market in the region. Enterprises in the Middle East and Africa region are actively investing in Data Centers to consolidate their IT infrastructure, resulting in colocation and managed services to witness high growth over the forecast period. Besides, there is a growing focus to promote digitalization in countries like the United Arab Emirates which is driving the cloud-based services. In fact, 70% of the startups in Dubai are using cloud computing, with 24% building their startup on the cloud itself (Source: Cloud Report 2017: Dubai Silicon Oasis Authority). Additionally, 80% of the startups are planning to increase their cloud spending in the next two years (Source: Cloud Report 2017: Dubai Silicon Oasis Authority), which is anticipated to drive the data center colocation market in the region. In March 2018, Du-an Emirates Integrated Telecommunication Company, entered into a partnership with Epsilon to connect the UAE and major data centers in United States, Europe, and Asia, thus reducing the overall lead time which is further projected to support the data center colocation market. Furthermore, countries in the region have been witnessing an increasing number of applications requiring high bandwidth. Moreover, the bandwidth cost is expected to fall significantly during the course of the forecast period on account of the arrival of the undersea cable. This is leading to the increasing deployment of high-speed applications in the region.

### Segmentation:

#### By Colocation Model

Retail Colocation

Wholesale Colocation

## By End Users

Small Enterprises

Medium Enterprises

Large Enterprises

## By Industry Vertical

Banking and Financial Services

Manufacturing

Communication and Technology

Healthcare

Energy

Government

Media and Entertainment

Others

## By Country

Germany

United Kingdom

France

Netherlands

Spain

Saudi Arabia

United Arab Emirates

Israel

Others

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