

Switzerland Data Center Market - Investment Analysis & Growth Opportunities 2022-2027

Market Report | 2022-10-20 | 110 pages | Arizton Advisory & Intelligence

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Report description:

The Switzerland data center market is expected to grow at a CAGR of 3.37% during 2022-2027.

MARKET INSIGHTS

The market is preferred for investments due to the geographical advantages like data center free cooling, less prone to natural calamities, high availability of the data center infrastructure supplement and technology, and highly qualified labor with low tax rates. Cloud service providers such as Microsoft, Google, and Oracle have a strong presence in Switzerland and are expanding further with the construction of new availability zones. For instance, in June 2022, Microsoft added an availability zone in its Zurich Azure region in Switzerland.

The industry is aided by factors such as growth in the adoption of cloud-based services, adoption of AI, big data & IoT, and deployment of 5G network services. In terms of renewable energy, the Energy Strategy 2050 focuses on boosting renewable energy generation in Switzerland. It aims to add around 11,400 GWh (excluding hydroelectric) renewable energy to its electricity generation mix by 2035. The region's market is one of the most mature markets of Western Europe as it is well connected to the FLAPD markets such as Germany, France, and Italy.

KEY HIGHLIGHTS

a) In Switzerland, Zurich is the major financial capital and the country's primary data center hub, with over 50 existing third-party data centers. Other cities such as Geneva and Bern are major locations in Switzerland with significant internet exchange landing stations.

b) With the increasing demand for digital technologies and smart devices, the adoption of advanced technologies such as 5G, AI, big data & IoT is increasing in the Switzerland data center market.

c) Regarding 5G network services, Switzerland witnessed the 5G deployments from Swisscom, Salt Mobile, Sunrise, Nokia, and

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Huawei Technologies for commercial and industrial services.

d) Switzerland has become a hub for Artificial Intelligence (AI), as Google and IBM are increasing their AI research investments. For instance, Swiss International Airlines (SWISS) adopted artificial intelligence and collaborated with Google Cloud to develop a platform for managing the operation of regular flights.

e) The Swiss Federal Data Protection Act (DPA) and the Swiss Federal Data Protection Ordinance (DPO) provide guidelines for data protection and privacy for the data stored inside the country.

WHY SHOULD YOU BUY THIS RESEARCH?

1. Market size available in the investment, area, power capacity, and Switzerland colocation market revenue.
2. An assessment of the investment in Switzerland by colocation and enterprise operators.
3. Investments in the area (square feet) and power capacity (MW) across locations in the country.
4. A detailed study of the existing market landscape, an in-depth industry analysis, and insightful predictions about the Switzerland data center market size during the forecast period.
5. Snapshot of existing and upcoming third-party data center facilities in Switzerland
 - a. Facilities Covered (Existing): 51
 - b. Facilities Identified (Upcoming): 4
 - c. Coverage: 20 Cities
 - d. Existing vs. Upcoming (Area)
 - e. Existing vs. Upcoming (IT Load Capacity)
6. Data center colocation market in Switzerland
 - a. Market Revenue & Forecast (2021-2027)
 - b. Wholesale vs. Retail Revenue & Forecast (2021-2027)
 - c. Retail Colocation Pricing
 - d. Wholesale Colocation Pricing
7. The Switzerland market landscape investments are classified into IT, power, cooling, and general construction services with sizing and forecast.
8. A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the industry.
9. Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the industry.
10. A transparent research methodology and the analysis of the demand and supply aspects of the market.

VENDOR LANDSCAPE

- The market has witnessed investments from new entrants such as STACK Infrastructure. Additionally, the industry has witnessed edge data center investment, Siemens, Swiss Center of Applied Underground Technologies (SCAUT), Datwyler Cabling Solutions, and Amberg Engineering partnered to develop underground edge centers in urban tunnels in Switzerland.

- In addition, the providers are entering the Switzerland data center market by acquiring the local centers; for instance, in April 2022, NorthC, a Netherlands data center provider, signed an agreement to acquire the data center of Metrics.

- Some of the Switzerland providers aim to be carbon neutral; for instance, NorthC Group aimed to be carbon neutral by 2030 by using 100% of renewable energy sources at its facilities.

- The industry has the presence of both local and global construction contractors that cater to major operators in the market. For instance, Basler & Hofmann provides design services for Vantage Data Centers' Zurich Campus Building 1.

Major Vendors

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IT Infrastructure Providers

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- ☐ Atos
- ☐ Broadcom
- ☐ Cisco Systems
- ☐ Dell Technologies
- ☐ Fujitsu
- ☐ Hewlett Packard Enterprise
- ☐ Huawei Technologies
- ☐ IBM
- ☐ Inspur
- ☐ Lenovo
- ☐ NetApp
- ☐ NEC Corporation

Data Center Construction Contractors & Sub-Contractors

- ☐ Arup
- ☐ Basler & Hofmann
- ☐ cpcm
- ☐ DPR Construction
- ☐ ffbk Architekten
- ☐ Gruner
- ☐ ISG
- ☐ Kirby Group Engineering
- ☐ Steiger Concept
- ☐ Turner & Townsend

Support Infrastructure Providers

- ☐ ABB
- ☐ Caterpillar
- ☐ Cummins
- ☐ Eaton
- ☐ Legrand
- ☐ Mitsubishi Electric
- ☐ Rittal
- ☐ Rolls Royce
- ☐ Schneider Electric
- ☐ Socomec
- ☐ STULZ
- ☐ Vertiv

Data Center Investors

- ☐ Digital Realty
- ☐ Equinix
- ☐ NTT Global Data Centers
- ☐ Vantage Data Centers

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-□Green

New Entrants

-□Stack Infrastructure

EXISTING VS. UPCOMING DATA CENTERS

-□Existing Facilities in the region (Area and Power Capacity)

-□Zurich

-□Other Cities

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

REPORT COVERAGE:

This report analyses the Switzerland data center market share. It elaboratively analyses the existing and upcoming facilities and investments in IT, electrical, mechanical infrastructure, general construction, and tier standards. It discusses market sizing and investment estimation for different segments. The segmentation includes:

-□IT Infrastructure

-□Servers

-□Storage Systems

-□Network Infrastructure

-□Electrical Infrastructure

-□UPS Systems

-□Generators

-□Transfer Switches & Switchgears

-□PDUs

-□Other Electrical Infrastructure

-□Mechanical Infrastructure

-□Cooling Systems

-□Rack Cabinets

-□Other Mechanical Infrastructure

-□Cooling Systems

-□CRAC & CRAH Units

-□Chiller Units

-□Cooling Towers, Condensers & Dry Coolers

-□Economizers & Evaporative Coolers

-□Other Cooling Units

-□General Construction

-□Core & Shell Development

-□Installation & commissioning Services

-□Engineering & Building Design

-□Fire Detection & Suppression Systems

-□Physical Security

-□Data Center Infrastructure Management (DCIM)

-□Tier Standard

-□Tier I & Tier II

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- Tier III
- Tier IV
- Geography
- Zurich
- Other Cities

KEY QUESTIONS ANSWERED

1. How much is the investment in the Switzerland data center market expected to grow?
2. What is the growth rate of the Switzerland data center market?
3. How many data centers have been identified in Switzerland?
4. What are the driving factors for Switzerland's data center market?
5. Who are the key investors in the Switzerland data center market?

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