

## **Denmark Data Center Market - Investment Analysis & Growth Opportunities 2022-2027**

Market Report | 2022-12-07 | 107 pages | Arizton Advisory & Intelligence

### **AVAILABLE LICENSES:**

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### **Report description:**

Denmark data center market is expected to grow at a CAGR of 14.97% during 2021-2027.

### **MARKET OVERVIEW**

In Denmark, Copenhagen is the prominent data center investment location as it has robust fiber connectivity, 5G network services, and power utility infrastructure. Regarding connectivity, there is a significant amount of submarine deployments in the country. For instance, Havhingsten was launched by Meta in collaboration with Aqua Comm and Bulk Fibre. Denmark offers cold climate conditions, which operators can use for cooling their centers (free cooling). Around 85% of free cooling is provided by the country, helping to cut off energy consumption by about 50%.

In terms of 5G network services, according to Danish Technological Institute, the country's 5G coverage stands at 99.3%. The prominent telecommunication operators, such as Telenor Group, Hi3G Denmark, and Telia, deploy 5G services across Odense, Copenhagen, and Aalborg. Denmark generates more than 80% of power from renewable energy sources. Colocation operators such as GlobalConnect, Digital Realty, Colt Data Centre Services, and STACK Infrastructure (DigiPlex) are procuring renewable energy sources for powering their facilities.

### **KEY HIGHLIGHTS**

a) Denmark data center market is one of the emerging markets in the Nordic region. 5G deployments, adoption of cloud-based services, adoption of IoT and Big Data, and investments in renewable energy are the major factors supporting the increase in data center investments.

b) In Denmark, the ICT industry has immense growth, valued at around USD 35 billion in 2021. According to IMD World Digital Competitiveness Ranking, Denmark ranked 4th in digital competitiveness among 64 countries globally in 2022.

c) Denmark is home to colocation operators such as GlobalConnect, Digital Realty, NNIT, Cibicom A/S, Bulk Infrastructure, Colt

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DCS, and Telia Group.

d) Due to the Russia-Ukraine war, some European countries may face electricity shortages because of the uncertain operation of Nord Stream 1 (offshore natural gas pipelines in Europe). Though Denmark currently has sufficient electricity supply, in the future, the electricity supply may fall short, which will drive up the price of electricity.

e) Cloud demand is significantly increasing in the country, due to which major cloud service providers are planning to set up cloud regions. There are significant investments by hyperscale operators such as Meta, Google, and Apple. In addition, Google and Meta (Facebook) by acquiring land for the expansion of their facilities and centers developments in the country.

#### WHY SHOULD YOU BUY THIS RESEARCH?

- Market size available in the investment, area, power capacity, and the Denmark colocation market revenue.
- An assessment of the investment in Denmark by colocation and enterprise operators.
- Investments in the area (square feet) and power capacity (MW) across locations in the country.
- A detailed study of the existing market landscape, an in-depth industry analysis, and insightful predictions about the Denmark data center market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in Denmark
  - o Facilities Covered (Existing): 24
  - o Facilities Identified (Upcoming): 07
  - o Coverage: 10+ Locations
  - o Existing vs. Upcoming (Area)
  - o Existing vs. Upcoming (IT Load Capacity)
- Data center colocation market in Denmark
  - o Market Revenue & Forecast (2021-2027)
  - o Retail Colocation Pricing
- The Denmark market landscape investments are classified into IT, power, cooling, and general construction services with sizing and forecast.
- A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the industry.
- Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the industry.
- A transparent research methodology and the analysis of the demand and supply aspects of the market.

#### VENDOR LANDSCAPE

- Copenhagen, the major financial capital of Denmark, is the primary Denmark data center market hub, with 11 existing third-party centers. Other cities such as Odense and Groningen are other significant locations in Denmark for facilities development.
- In Denmark, Apple, Digital Realty, Meta, GlobalConnect, Microsoft, Penta Infra, and Cibicom were some key investors in 2021. The industry has witnessed investments from some new market entrants, such as STACK Infrastructure (DigiPlex).
- Denmark data center market will be heavily witnessing greenfield construction. Hyperscale providers put in significant investments, making them one of the major drivers for generating revenue for sub-contractors and general contractors in the market.
- Denmark has a free trade zone such as the Freeport of Copenhagen, benefitting industrial and enterprise investments with tax incentives.
- Providing district heating helps the facilities to reduce their energy usage and decrease their overall OPEX. The hyperscale and colocation operators have provided excess heat from the data center to the nearby cities and regions.

#### Major Vendors

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- [ ] Arista Networks
- [ ] Atos
- [ ] Broadcom
- [ ] Cisco Systems
- [ ] Dell Technologies
- [ ] Hewlett Packard Enterprise
- [ ] Huawei Technologies
- [ ] IBM
- [ ] Lenovo
- [ ] NetApp

## Data Center Construction Contractors & Sub-Contractors

- [ ] Aarsleff
- [ ] Arup
- [ ] Caverion
- [ ] Coromatic
- [ ] COWI
- [ ] Exyte (M+W Group)
- [ ] Gottlieb Paludan Architects
- [ ] Logi-Tek
- [ ] Mace Group
- [ ] Mercury
- [ ] MT Hojgaard
- [ ] NOVENCO Building & Industry
- [ ] Ramboll Group
- [ ] Soren Jensen

## Support Infrastructure Providers

- [ ] ABB
- [ ] Caterpillar
- [ ] Climaveneta (Mitsubishi Electric)
- [ ] Cummins
- [ ] Eaton
- [ ] Grundfos
- [ ] KOHLER-SDMO
- [ ] Legrand
- [ ] NG Metal
- [ ] Riello UPS (Riello Elettronica)
- [ ] Rittal
- [ ] Rolls-Royce
- [ ] Schneider Electric
- [ ] Socomec
- [ ] STULZ

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- Systemair
- UniCool
- Vertiv

#### Data Center Investors

- Apple
- Digital Realty
- Meta (Facebook)
- GlobalConnect
- Google
- Microsoft
- Penta Infra
- Cibicom A/S

#### New Entrant

- STACK Infrastructure (DigiPlex)

#### EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the region (Area and Power Capacity)
  - o□Copenhagen
  - o□Other Cities
- List of Upcoming Facilities in the region (Area and Power Capacity)

#### REPORT COVERAGE:

This report analyses the Denmark 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
  - o□Servers
  - o□Storage Systems
  - o□Network Infrastructure
- Electrical Infrastructure
  - o□UPS Systems
  - o□Generators
  - o□Transfer Switches & Switchgears
  - o□PDUs
  - o□Other Electrical Infrastructure
- Mechanical Infrastructure
  - o□Cooling Systems
  - o□Rack Cabinets
  - o□Other Mechanical Infrastructure
- Cooling Systems
  - o□CRAC & CRAH Units
  - o□Chiller Units

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- o□Cooling Towers, Condensers & Dry Coolers
- o□Economizers & Evaporative Coolers
- o□Other Cooling Units
- General Construction
- o□Core & Shell Development
- o□Installation & commissioning Services
- o□Engineering & Building Design
- o□Fire Detection & Suppression Systems
- o□Physical Security
- o□Data Center Infrastructure Management (DCIM)
- Tier Standard
- o□Tier I & Tier II
- o□Tier III
- o□Tier IV
- Geography
- o□Copenhagen
- o□Other Cities

#### TARGET AUDIENCE

- Real Estate Investment Trusts (REIT)
- Construction Contractors
- Infrastructure Providers
- New Entrants
- Consultants/Consultancies/Advisory Firms
- Corporate and Governments Agencies

#### KEY QUESTIONS ANSWERED

- 1.□How much is the Denmark data center market investment expected to grow?
- 2.□How many data centers have been identified in the Denmark Data Center Market?
- 3.□What are the driving factors for the Denmark data center market?
- 4.□What is the growth rate of the Denmark data center market?
- 5.□Who are the key colocation operators in the Denmark data center market?

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