

Poland Data Center Market - Investment Analysis and Growth Opportunities 2022-2027

Market Report | 2022-12-07 | 112 pages | Arizton Advisory & Intelligence

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Report description:

The Poland data center market will grow at a CAGR of 9.85% from 2021-2027.

The Poland data center market has been witnessing investments from new entrants, especially global companies owing to its strategic location because the country is connecting with major data center markets such as Germany, Sweden, and Denmark, and affordable land & power costs, and other factors. In Poland, Under the Act on the Acquisition of Real Estate by Foreigner, the foreign investor purchasing any real estate asset has to take prior permission from the Minister of Administration and Internal Affairs; failing to do so will be considered an invalid purchase.

KEY HIGHLIGHTS

- The country's government has taken several digitalization initiatives, such as Digital Competence Development Programme (2020-2030) and National Broadband Plan 2025, that will further drive technology growth and demand for centers in the country.
- In terms of renewable energy, the industry is among the significant emerging markets in the region with the availability of renewable energy sources such as wind, photovoltaic, hydropower, and others. The government is working towards an 'Energy Policy of Poland' to increase the share of renewable energy sources by at least 23% by 2030.
- In terms of 5G connectivity deployment, in Poland, telecom operators are actively deploying 5G services, including Orange, Polkomtel (Plus), T-Mobile, Nokia, and others.
- Poland has over 14 Special Economic Zones (SEZs) and Free Trade Zones (FTZs) in Warsaw, Katowice, Wroclaw, and Poznan, which provide multiple benefits to investors, such as exemption of corporate tax up to 50 years, full exemption of import and export tax, and support with the local labor recruitment.
- The Poland data center market has established over 20,000 Ukrainian companies, expected to grow many folds driven by the political crisis between Ukraine and Russia. The entry of Ukrainian companies is aided by factors such as legislative facilitation by Poland, such as ease in the procedure for employment for Ukrainians, facilitation for residence legislation, and providing support

for setting up the company in Poland.

WHY SHOULD YOU BUY THIS RESEARCH?

- Market size available in the investment, area, power capacity, and the Poland colocation market revenue.
- An assessment of the investment in Poland 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 Poland data center market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in Poland
- Facilities Covered (Existing): 46
- Facilities Identified (Upcoming): 5
- Coverage: 6+ Locations
- Existing vs. Upcoming (Area)
- Existing vs. Upcoming (IT Load Capacity)
- Data center colocation market in Poland
- Market Revenue & Forecast (2021-2027)
- Wholesale vs. Retail Revenue & Forecast (2021-2027)
- Retail Colocation Pricing
- Wholesale Colocation Pricing
- The Poland 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 industry.

VENDOR LANDSCAPE

- In Poland data center market, 3S, Atman, Equinix, Polcom, Adgar Investments & Development, Netia, and T-Mobile are the major colocation operators in the country. In 2021, the country witnessed investments from Equinix, 3S, Atman, and Beyond.pl, followed by new entrants such as Data4, Orange Business Services, and Vantage Data Centers.
- The country is witnessing an increase in the development of facilities by local operators for further construction/expansion of centers, which led due to the demand from local customers to colocate in regional data centers for benefits such as low prices and flexibility for services. For instance, Atman opened its F6 facility in 2021 and is constructing its F7 facility in Warsaw to expand its Warsaw data center campus.
- Global construction contractors have provided services in developing facilities in the Poland data center market. For instance, Turner & Townsend announced in March 2022 that to have been appointed by Data4 to provide project & cost management at Data4's construction in Warsaw.
- In Poland, companies collaborate with IT infrastructure providers to improve infrastructure efficiency in the facilities. For instance, Grupa Onet.pl Poland-based company has adopted Nexus 5000, Nexus 7000, and Nexus 2000 Switches from Cisco Systems for its data center networking.
- Global cloud service providers such as OVHcloud, Microsoft, and Google are investing in developing cloud regions in the country to expand their reach and better service their Central & Eastern European-based customers. For instance, in April 2021, Google announced the launch of its cloud data hub in Warsaw with an investment of around USD 2 billion.

IT Infrastructure Providers

- Atos
- Cisco Systems
- Dell Technologies
- Fujitsu
- Hewlett Packard Enterprise
- Hitachi Vantara
- Huawei Technologies
- IBM
- Inspur
- Juniper Networks
- Lenovo
- NetApp
- Pure Storage

Data Center Construction Contractors & Sub-Contractors

- AODC
- PORR GROUP
- Qumak
- Strabag
- TECHKO
- Turner & Townsend
- Warbud

Support Infrastructure Providers

- 3M
- ABB
- Aermec
- Airedale International Air Conditioning
- Alfa Laval
- Carrier
- Caterpillar
- Condair
- Cummins
- Daikin Applied
- Delta Electronics
- Eaton
- HITEC Power Protection
- Johnson Controls
- Legrand
- Mitsubishi Electric
- Perkins Engines
- Piller Power Systems
- Rittal
- Rolls-Royce
- Schneider Electric
- Siemens

- STULZ
- Vertiv

Data Center Investors

- 3S Group
- Artnet
- Atman
- pl
- Equinix
- Netia
- T-Mobile

New Entrants

- Data4
- Orange Business Services
- Vantage Data Centers

EXISTING VS. UPCOMING DATA CENTERS

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

REPORT COVERAGE:

This report analyses the Poland 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
- Tier III
- Tier IV
- Geography
- Warsaw
- Other Cities

KEY QUESTIONS ANSWERED:

- 1.□How much is the Poland data center market investment expected to grow?
- 2.□How many data centers have been identified in Poland?
- 3.□What are the driving factors for Poland data center market?
- 4.□What is the growth rate of the Poland data center market?
- 5.□Who are the key investors in the Poland data center market?
- 6.□How much will MW power capacity be added across Poland from 2022 to 2027?

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