

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

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Report description:

The FLAP data center market is expected to grow at a CAGR of 2.86% from 2021-2027.

DRIVING FACTORS FOR INVESTMENT IN THE MARKET

- The FLAP data center market is one of Western Europe's major data center markets. The market is witnessing the growth of investments due to the adoption of 5G network services, Artificial Intelligence, cloud-based services, IoT, big data, and artificial intelligence.
- The increase in the adoption of cloud-based services in the country is growing the establishment of cloud regions by major cloud service providers such as Google, AWS, Microsoft, Tencent, OVHcloud, IBM, Alibaba, and Oracle.
- Telecom operators Vodafone, EE, Three UK, O2, Telefonica Deutschland, VodafoneZiggo, KPN Mobile, T-Mobile, and Deutsche Telekom are some of the significant operators deploying 5G network services across the FLAP market.
- In addition, in August 2022, the Greater London Authority announced plans to change the application process for data center development to tackle and ease the West London power crisis with better electricity management regulations.
- In terms of artificial intelligence, Cyxtera Technologies, a data center operator, announced plans to use CareAR's service experience management platform for providing remote hands service at its data centers in London and other locations.

DRIVING FACTORS FOR AREA IN THE MARKET

- Free Trade Zones, Special Economic Zones, and industrial parks majorly attract investment in the FLAP data center market. For instance, the UK government has established a low tax zone at London Gateway that will offer tax incentives, no stamp duties, rebates on construction & machinery, lower tariffs, and lower customs obligations.
- Some of the real estate companies in the FLAP industry are involved in developing the data center campus. For instance, P3 logistics Parks, a European logistics real estate firm, has acquired land to establish a data center campus in Hanau, west of Frankfurt. The campus is constructed in several phases.
- In the FLAP market, Frankfurt, London, Amsterdam, Paris and Slough, Chesham, and Dartford are significant locations for facilities

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development.

-□As per the Cushman & Wakefield global data center market comparison 2022 report, the land price in London is around USD 150 per square foot. The higher land cost in London is expected to shift investments to other cities in the industry with lower land prices. For instance, Amsterdam has a lower land price for building facilities in the FLAP data center market, which is USD 38 per square foot.

-□Some locations allocate most of the area for developing facilities in the FLAP industry. For instance, the Dutch Data Center Association states that over 70% of the data center floor space is in the Amsterdam region.

DRIVING FACTORS FOR THE POWER CAPACITY IN THE MARKET

-□In terms of renewable energy, in the FLAP market, renewable energy is majorly produced from solar, wind, hydroelectricity & marine & wave energy, and bioenergy. For instance, in April 2022, France's Government announced a strategy for renewable energy innovation projects as per the government's France 2030 national investment plan, with an investment of over USD 1 billion.

-□Governments across the industry are targeting to reduce carbon emissions. For instance, the Netherlands targets net zero carbon emissions by 2050.

-□The cities under the FLAP industry made commitments regarding carbon neutrality. For instance, Frankfurt has committed to converting the energy supply to renewable energy in the entire city by 2050.

-□The market also witnessed the commitments made by investors and organizations for procuring renewable energy sources to power the facilities. For instance, In April 2022, Telehouse announced that it aims to net zero carbon emissions by 2026.

-□The facilities in the FLAP market also witnessed the power purchase agreement for powering the centers. For instance, Google entered the corporate power purchase agreement (CPPA) with Orsted to provide 50 MW of wind energy for its facility in Germany.

SUPPLY & DEMAND IN THE FLAP DATA CENTER MARKET

-□Government support and initiatives are expected to increase the boost the FLAP market. For instance, in February 2022, the UK Government formed a joint venture with Ark Data Centers known as Crown Hosting Data Centres (CHDC) and invested around USD 300 million in hosting services.

-□In the FLAP market, several governments support the data centers to overcome the restrictions due to the moratoriums. For instance, according to the New urban master plan to avoid the moratorium, Frankfurt's planning department developed a new concept to manage the data center construction in Frankfurt for better usage of resources and reducing noise and carbon emissions.

-□Several sectors, such as BFSI, healthcare, education, hospitality, government, and transport, have observed data migration to the cloud in the FLAP market. For instance, in May 2022, Google signed an agreement with the Central Dutch government to facilitate multi-cloud adoption by government entities across several departments.

-□Some major colocation service providers in the FLAP market are CyrusOne, Digital Realty, Data4, Equinix, EdgeConneX, Global Switch, Serverfarm, Iron Mountain, Telehouse, Colt Data Centre Services, and VIRTUS Data Centres.

-□The increased demand for colocation data center facilities in the FLAP market is witnessing investments for new entrants such as CloudHQ, Global Technical Realty (GTR), and Yondr.

WHY SHOULD YOU BUY THIS RESEARCH?

- 1.□Market size available in the investment, area, power capacity, and FLAP market revenue.
- 2.□Assess the revenue share between retail and wholesale colocation across the FLAP market.
- 3.□Assessment of the data center construction cost breakup across the FLAP market.
- 4.□Study of the macroeconomic and microeconomic factors across the FLAP market.

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5. An assessment of the data center investment in the FLAP market by the data center operators.
6. Investments in the area (square feet) and power capacity (MW) across locations in the FLAP market.
7. A detailed study of the existing FLAP data center market landscape, an in-depth industry analysis, and insightful predictions about industry size during the forecast period.
8. Snapshot of existing and upcoming third-party data center facilities in the FLAP market.
 - a) Facilities Covered (Existing): 259
 - b) Facilities Identified (Upcoming): ~29
 - c) Coverage: 4 Cities
 - d) Existing vs. Upcoming (Area)
 - e) Existing vs. Upcoming (IT Load Capacity)
9. Data center colocation market in the FLAP
 - a) Market Revenue & Forecast (2021-2027)
 - b) Retail Colocation Pricing
10. The FLAP market investments are classified into power, cooling, and general construction services with sizing and forecast.
11. A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the industry.
12. Business overview and product offerings of prominent construction contractors, support infrastructure providers, and investors operating in the industry.
13. A transparent research methodology and the analysis of the demand and supply aspects of the industry.

VENDOR LANDSCAPE

Data Center Construction Contractors & Sub-Contractors

- 2bm
- AECOM
- Arup
- APL Data Center
- Artelia
- ARC:MC
- Atkins
- BENTHEM CROUWEL ARCHITECTS
- BladeRoom Data Centres
- Bouygues Construction
- CAP INGELEC
- Deerns
- Designer Group
- Dornan
- DPR Construction
- Eiffage
- EYP MCF
- Future-tech
- HDR Architecture
- ICT Facilities
- INFINITI
- ISG
- JCA Engineering

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- []Linesight
- []LPI Group
- []Lupp Group
- []Mace Group
- []Max Bogl Group
- []Mercury
- []Metnor Construction
- []MiCiM
- []M+W Group
- []NWA
- []Oakmont Construction
- []PM Group
- []Red Engineering
- []Reid Brewin Architects
- []Royal HaskoningDHV
- []Salute Mission Critical
- []Skanska
- []SPIE UK
- []STO Building Group
- []STS Group
- []Sudlows
- []Turner & Townsend
- []Waldeck
- []Winthrop Engineering & Contracting
- []Zech Group

Support Infrastructure Providers

- []3M
- []ABB
- []Airedale
- []Alfa Laval
- []Carrier
- []Caterpillar
- []Climaveneta (Mitsubishi Electric)
- []Condair
- []Cummins
- []D'Hondt Thermal Solutions
- []Delta Electronics
- []Eaton
- []ebm-papst
- []FlaktGroup

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- []Perkins Engines
- []Piller Power Systems
- []Riello UPS
- []Rittal
- []Rolls-Royce
- []Schneider Electric
- []Siemens
- []STULZ
- []Socomec
- []Trane Technologies
- []Vertiv

Data Center Investors

- []Amazon Web Services (AWS)
- []Ark Data Centres
- []China Mobile International (CMI)
- []Colt Data Centre Services
- []CyrusOne
- []DATA4
- []Digital Realty
- []Echelon Data Centres
- []EdgeConneX
- []Equinix
- []Global Switch
- []Iron Mountain
- []Kao Data
- []Keppel Data Centres
- []Maincubes
- []NTT Global Data Centers
- []Microsoft
- []NewTelco
- []Netwise Hosting
- []Serverfarm
- []T5 Data Centers

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- []Telehouse
- []Vantage Data Centers
- []VIRTUS Data Centres

New Entrants

- []CloudHQ
- []Global Technical Realty (GTR)
- []Yondr

EXISTING VS. UPCOMING DATA CENTERS

- []Existing Facilities in the region (Area and Power Capacity)
 - a)[]Frankfurt
 - b)[]London
 - c)[]Amsterdam
 - d)[]Paris
- []List of Upcoming Facilities in the region (Area and Power Capacity)

REPORT COVERAGE:

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

- []Electrical Infrastructure
 - a)[]UPS Systems
 - b)[]Generators
 - c)[]Transfer Switches & Switchgears
 - d)[]PDUs
 - e)[]Other Electrical Infrastructure
- []Mechanical Infrastructure
 - a)[]Cooling Systems
 - b)[]Rack Cabinets
 - c)[]Other Mechanical Infrastructure
- []Cooling Systems
 - a)[]CRAC & CRAH Units
 - b)[]Chiller Units
 - c)[]Cooling Towers, Condensers & Dry Coolers
 - d)[]Economizers & Evaporative Coolers
 - e)[]Other Cooling Units
- []General Construction
 - a)[]Core & Shell Development
 - b)[]Installation & Commissioning Services
 - c)[]Engineering & Building Design
 - d)[]Fire Detection & Suppression Systems
 - e)[]Physical Security
 - f)[]Data Center Infrastructure Management (DCIM)

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- Tier Standard
- a) Tier I & Tier II
- b) Tier III
- c) Tier IV
- Cities
- a) Frankfurt
- b) London
- c) Amsterdam
- d) Paris

KEY QUESTIONS ANSWERED:

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

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