

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

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Report description:

Norway data center market is expected to grow at a CAGR of 17.25% during 2022-2027.

MARKET OUTLOOK

-□Norway is among the prominent locations across the region regarding the availability and usage of renewable energy sources. The government has taken several initiatives to grow renewable energy adoption, such as setting targets for achieving net zero emissions by the year 2050. The district heating system is among the major initiatives the country has significantly adopted toward a sustainable economy. For instance, in February 2021, the Norwegian government announced a proposal to demand data center operators connect their facilities to the district heating system.

-□Norway data center market is a significantly growing industry in the Nordic region aided by factors that include government initiatives, growing cloud data center regions, adoption of advanced technology, growth in subsea & inland connectivity, and district heating systems. The country's government is working towards the digital transformation of government operations and the economy. The government of Norway has established its Norwegian Digitalization Agency, which aims to coordinate digitalization in the country strategically.

-□The government of Norway has established several industrial business parks that offer spaces for business for sustainable operations. Mo Industrial Park, Heroya Industrial Park, Haugaland Business Park, and Raufoss Industrial Park are some of the business parks in Norway. The Norway data center market is well connected to several major markets with around 11 submarine cables followed by upcoming cables such as Celtic Norse, Leif Erikson, and N0r5ke Viking, which will be ready for services in coming years.

KEY HIGHLIGHTS

-□The Government of Norway is actively working to support the growth of the data center industry in the country. For instance, in 2018, the government introduced a Data Center Development Strategy (DCDS) to establish Norway as a Data Center Nation.

-□In June 2021, the Norwegian data center industry announced the establishment of Norsk Datasenterindustri (Norwegian Data

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Center Industry) to strengthen the industry in Norway.

-□Global cloud providers such as Amazon Web Services, IBM, and Microsoft Azure have a presence in the country. In September 2021, Microsoft announced the launch of three availability zones in its Norway East Azure Cloud region in Oslo. In addition, in October 2022, Google plans to establish the new Google cloud region in Norway.

-□In Norway, several sectors, such as BFSI, healthcare, education, hospitality, government, and transport, have migrated their resources to the cloud region. For instance, Moss Municipality has shifted some applications to Microsoft Azure.

-□In terms of 5G connectivity, telecom operators such as Telia, Nokia, Telenor, Ice, Ericsson, and Equinor, are involved in deploying the 5G network services across the country. For instance, in July 2022, Eltel Norway signed an agreement with Telenor to upgrade Telenor's telecommunication network with 5G network technology.

-□The Government of Norway has established The Norwegian Industrial Property Office (NIPO), which offers Norwegian industrial development and promotion of economic growth. This is expected to increase further availability of area and opportunities for industrial investment in the country.

WHY SHOULD YOU BUY THIS RESEARCH?

-□Market size available in the investment, area, power capacity, and the Norway colocation market revenue.

-□An assessment of the investment in Norway 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 Norway data center market size during the forecast period.

-□Snapshot of existing and upcoming third-party data center facilities in Norway

o□Facilities Covered (Existing): 26

o□Facilities Identified (Upcoming): 11

o□Coverage: 10+ Locations

o□Existing vs. Upcoming (Area)

o□Existing vs. Upcoming (IT Load Capacity)

-□Data center colocation market in Norway

o□Market Revenue & Forecast (2021-2027)

o□Wholesale vs. Retail Revenue & Forecast (2021-2027)

o□Retail Colocation Pricing

o□Wholesale Colocation Pricing

-□The Norway 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

-□Norway data center market has several local and global operators, such as Green Mountain, LEFDAL MINE DATACENTER, Bulk Infrastructure, Basefarm (Orange), and STORESPEED are some of the major colocation operators in the country.

-□In addition, the country also witnessed investments from new entrants such as AQ Compute, STACK Infrastructure, and Namsos Datasenter.

-□The country witnessed the entry of new global service providers through acquisitions. For instance, in March 2022, IPI Partners announced operating its recently acquired DigiPlex's data centers in Norway under the name of STACK Infrastructure EMEA unit.

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- The increase in the deployment of the 5g network connectivity is aiding the Edge data centers investments that offer low latency and easy connectivity to tier II and tier III cities. For instance, in February 2022, Namsos Datasenter, in partnership with Keysource, a service provider, announced the deployment of an edge data center in Norway, which is expected to be operational in 2023.
- Most of the facilities developed in the country adopt the district heating concept to supply the excess heat generated by the facilities to the local commercial and residential buildings. For instance, Green Mountain announced the expansion of its RJU1-Rjukan facility and plans to share waste heat from the facility with a nearby land-based fish farm.
- Several operators in the country are investing in sustainable operations for their data centers. For instance, Green Mountain's upcoming project Kalberg site is powered by the Statnett substation, which is powered by three hydropower production projects. The site will have a 100% renewable energy supply from wind and hydro sources.
- Norway data center market has a significant presence of local and global vendors regarding IT, support, and general construction services. For instance, CTS Nordics have been selected to provide design & build services for Green Mountain's data center expansion project in Oslo.

Major Vendors

IT Infrastructure Providers

- Arista Networks
- Cisco Systems
- Dell Technologies
- Hewlett Packard Enterprise
- Huawei Technologies
- Hitachi Vantara
- IBM
- Juniper Networks
- Lenovo
- NetApp
- NetNordic
- Oracle
- Pure Storage
- Super Micro Computer

Data Center Construction Contractors & Sub-Contractors

- Coromatic
- COWI
- CTS Nordics
- Designer Group
- Keysource
- RED Engineering
- YIT

Support Infrastructure Providers

- ABB
- Alfa Laval
- Carrier
- Caterpillar
- Cummins

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- []Eaton
- []FlaktGroup
- []HITEC Power Protection
- []KOHLER-SDMO
- []Legrand
- []Piller Power Systems
- []Rittal
- []Rolls-Royce
- []Schneider Electric
- []Socomec
- []STULZ
- []Trane
- []Vertiv

Data Center Investors

- []Bulk Infrastructure
- []Green Mountain
- []Green Edge Compute
- []STORESPEED

New Entrants

- []AQ Compute
- []Namsos Datasenter
- []STACK Infrastructure (DigiPlex)

EXISTING VS. UPCOMING DATA CENTERS

- []Existing Facilities in the region (Area and Power Capacity)
 - o[]Oslo
 - o[]Other Cities
- []List of Upcoming Facilities in the region (Area and Power Capacity)

REPORT COVERAGE:

This report analyses the Norway 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

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- 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
- 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

KEY QUESTIONS ANSWERED

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

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