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

Market Report | 2023-01-10 | 108 pages | Arizton Advisory & Intelligence

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Report description:

The Sweden data center market is expected to grow at a CAGR of 9.15% during 2022-2027.

MARKET INSIGHTS

The country has the presence of major cloud service providers such as AWS, Microsoft, Google, and Oracle, & hyperscale operator, Facebook, which are contributing to the expansion of the market in the country along with expected growth opportunities for wholesale colocation providers.
The Government of Sweden launched the National Cyber Security Center (NCSC), which prevents, identifies, and protects IT networks from cyber-attacks. Sweden data center market is growing, aided by factors such as digitalization growth, robust connectivity, and increasing investments in renewable energy generation. The industry also has GDPR implemented, which acts as a driver for increasing demand for facilities construction due to the need for storing data locally in the country.

Regarding 5G connectivity, telecom operators such as Tele2, Telia Sweden, Tre, Telenor, Net4Mobility, and 3 Sweden are deploying 5G network services across the country. For instance, Net4Mobility aims to cover around 90% of the population through its 5G network services. Further, the country has abundant renewable energy sources, with over 60% renewable energy mix, which is likely to reach 100% by 2040. In addition, the country aims to be carbon neutral by 2045.

KEY HIGHLIGHTS

1. The country's government has taken several digital initiatives to support digitalization that will drive data center demand. For instance, the Government of Sweden established its National Digitalization Council in 2017 as part of its digitalization strategy for growing the country's digital growth opportunities.
2. The country has been witnessing the adoption of high computing power technologies such as AI supported by government

initiatives. The government established its National AI Strategy, namely the National Approach for Artificial Intelligence, in 2018, which aims at establishing future policy actions and growth of adoption of AI in areas such as education & training, research, innovation, and others.
3. Northern Data (Hydro66) in Sweden provides the OCP Ready Colo Facility program, where hyperscale companies can easily accommodate racks and deploy OCP Open Racks and IT infrastructure solutions.
4. In Sweden, Amazon Web Services (AWS), Microsoft, Facebook, atNorth, EcoDataCenter, and Conapto are procuring renewable energy to power their facilities. For instance, EcoDataCenter is involved in developing the facility in the Falun data center campus, which is powered by 100% renewable energy.
5. The country is among the prominent locations in the Nordic that have adopted the district heating concept for data centers. According to DG Energy and MSB (Swedish Civil Contingencies Agency), the energy consumption from district heating is around 38%, followed by 23% from electricity, 21% from biomass, and 18% from heat.

WHY SHOULD YOU BUY THIS RESEARCH?

- Market size available in the investment, area, power capacity, and the Sweden colocation market revenue.
- An assessment of the investment in Sweden 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 Sweden data center market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in Sweden
  - Facilities Covered (Existing): 34
  - Facilities Identified (Upcoming): 6
  - Coverage: 9+ Locations
  - Existing vs. Upcoming (Area)
  - Existing vs. Upcoming (IT Load Capacity)
- Data center colocation market in Sweden
  - Market Revenue & Forecast (2021-2027)
  - Wholesale vs. Retail Revenue & Forecast (2021-2027)
  - Retail Colocation Pricing
  - Wholesale Colocation Pricing
- The Sweden 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

- The Sweden data center market has a presence of several local and global operators such as Equinix, Digital Realty, Northern Data (Hydro66), EcoDataCenter, STACK Infrastructure (DigiPlex), Conapto, and others.
- 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 Sweden under the name of STACK Infrastructure EMEA unit.
- Most of the facilities developed in the country adopt the district heating concept to supply the excess heat generated by the data center to the local residentials. For instance, the EcoDataCenter facility, Falun data center campus, is designed to provide waste heat to the district heating system.

-The Sweden data center market in terms of area is dominated by Stockholm, followed by emerging locations such as Lulea, Falun, Malmo, and others. Stockholm has witnessed the establishment of Stockholm Data Parks, which has aided in the growth of the data center market.
-Sweden's data center market is one of the most connected locations in the Nordic region in terms of subsea cable connectivity. The country has around 23 existing submarine cables connecting Sweden to major markets such as Estonia, Finland, Lithuania, Denmark, and others.
-Local and global construction contractors are actively offering their services in the Sweden data center market. For instance, RED has provided MEP consultancy services to the STACK Infrastructure (DigiPlex) data center facility in Stockholm, Sweden.

Major Vendors
IT Infrastructure Providers

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

Data Center Construction Contractors & Sub-Contractors
-AFEC
-Bravida
-Coromatic
-Dornan
-DPR Construction
-Granlund
-Kirby Group Engineering
-NCC
-RED
-STS Group
-Skanska
-Sweco
-Swedish Modules

Support Infrastructure Providers
-ABB
-Alfa Laval
-Caterpillar
-Carrier
-Cummins
-Eaton
-FlaktGroup
-HITEC Power Protection

-KOHLER-SDMO
-Legrand
-NetNordic
-Rittal
-Reillo Elettronica (Riello UPS)
-Rolls-Royce
-Schneider Electric
-Socomec
-STULZ
-Swegon
-Vertiv

Data Center Investors
-atNorth
-Bahnhof
-Conapto
-Digital Realty
-EcoDataCenter
-Equinix
-Meta (Facebook)
-Google
-Multigrid
-Microsoft
-Northern Data

EXISTING VS. UPCOMING DATA CENTERS
-Existing Facilities in the region (Area and Power Capacity)
oStockholm
oOther Cities
-List of Upcoming Facilities in the region (Area and Power Capacity)

REPORT COVERAGE:

This report analyses the Sweden 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
oServers
oStorage Systems
oNetwork Infrastructure
-Electrical Infrastructure
oUPS Systems
oGenerators
oTransfer Switches & Switchgears
oPDUs

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
- Geography
o Stockholm
o Other Cities

KEY QUESTIONS ANSWERED

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

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