Datacenter Services & Infrastructure

Covering the companies, products, services and technologies of the global datacenter market.

The Datacenter Services & Infrastructure Channel focuses on the global datacenter market with research covering critical metrics such as capacity and utilization as well as products, technologies, strategies and trends used by companies building and managing advanced, resilient and efficient datacenters. Technologies covered include mechanical and electrical equipment; connectivity; demand-side energy approaches; IT hardware and software for the management of datacenters (such as DCIM); prefabricated and modular datacenters; and ‘edge’ datacenters. Services covered include multi-tenant datacenter services and interconnection, segmented by key regional markets, both in the US and globally. Specific deliverables include profiles of vendors, geo-specific evaluations, examinations of key trends, analysis of M&A activity, and tracking of the ongoing expansion activity of datacenter operators and hyperscalers. Aimed at executives from datacenter providers, as well as vendors, investors and real estate professionals, the Datacenter Services & Infrastructure Channel covers the overall size, scope and growth of multiple aspects of the datacenter industry.

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Introduction

Enterprises will continue to adopt public cloud (IaaS), but as one option among many. For at least the next several years, they will also want private hosted cloud, colocation and some on-premises equipment, and will make use of services for advice, migration and help managing various elements. In the longer term, the rise of IoT and massive amounts of data to be created, processed and stored will continue to push demand for datacenter space as well as for services. In this rapidly changing IT world, providers with the scale to influence customers and regulators, spread risk, reduce costs, offer more flexibility and automate will have a competitive advantage, as long as they know who their target customers are and still offer the service levels that customers want.

There is a widespread assumption across the datacenter world that strong demand for IT, datacenter capacity and datacenter equipment will continue through the decade from 2015 to 2025. The patterns of demand for technology, almost all of which are upwards, will be shaped by many factors. Among these are supplier pricing, continued adoption of cloud, effectiveness of management and automation software (including for distributed infrastructure resiliency), the spread of the IoT, and macroeconomic and political factors, such as tax and privacy laws and energy policy.

Upcoming Research on Datacenter Services & Infrastructure

DEMAND-SIDE RESEARCH: VOICE OF THE CUSTOMER
The Voice of the Customer product suite provides survey-based insights from our global panels of IT purchasing decision-makers across enterprises, service providers and technology consumers.

MACROECONOMIC OUTLOOK
Through quarterly survey-based data and insight from our Leading Indicator panel of technology users, Macroeconomic Outlook examines global macroeconomic conditions and factors such as employment trends, price pressures and credit availability to monitor the state of corporate fitness.

VOICE OF THE ENTERPRISE (VOTE)
Combining 451 Research’s industry-leading analysis with data from The 451 Alliance, a global community of IT professionals, Voice of the Enterprise tracks adoption across thousands of organizations and exposes the major opportunities for enterprises, IT vendors, suppliers and investors. The following VotE products are part of the Datacenter Services & Infrastructure Channel.

Cloud, Hosting & Managed Services
Quarterly survey-based data and insight on the cloud, hosting and managed services market from our global panel of enterprise IT decision-makers

Datacenters
Annual survey-based data and insight on enterprise strategies for datacenters and related technologies and services, gathered from our proprietary global panel of enterprise IT and line-of-business decision-makers
Digital Pulse

Survey-based data and insight collected six times per year from our global panel of enterprise IT decision-makers, providing a unified, top-level view of enterprise IT strategies and initiatives and the underlying business and technology drivers.

VOICE OF THE SERVICE PROVIDER (VSP)

Through semiannual surveys and in-depth interviews with a curated global service provider panel, 451 Research’s Voice of the Service Provider helps to qualify and quantify buying behaviors, business drivers and strategic priorities for the expanding universe of public cloud providers, hosters, MSPs, telcos, systems integrators, SaaS companies and colocation providers. Each survey has a focused theme.

SUPPLY-SIDE RESEARCH

DATA CENTER KNOWLEDGEBASE

451 Research’s Datacenter KnowledgeBase is a global database of more than 7,000 retail and wholesale colocation datacenter facilities. This KnowledgeBase is established as the industry’s most authoritative and comprehensive set of intelligence on the multi-tenant datacenter (colocation) market, bringing together data from on-site visits, quarterly provider outreach and financial analysis.

We track more than 30 regional markets and more than 100 individual metrics per facility. The KnowledgeBase is available in four geographic market levels:

- Worldwide (Global) – All metro areas plus market sizing and forecast
- Global Region(s) – All metro areas within a single region, plus market sizing and forecast for that region
- Large Metro Area(s) – Sites within a single large metro area
- Emerging Metro Area(s) – Sites within a single emerging metro area

The Datacenter KnowledgeBase is currently updated on a quarterly basis. Clients access it online and can export data into Excel.

MARKET MONITOR & FORECAST

Understanding the pace of growth and identifying the segments and industries driving value in the market is the focus of 451 Research’s market tracking and forecasting methodologies. Through regular updates, 451 Research delivers its tracking and forecasting of the supply of key business application market indicators by region and country.

Data Services & Infrastructure

Proprietary forecast provides global datacenter market sizing in terms of the total number of datacenter sites, datacenter install base count, space, power and racks. It is segmented by datacenter owner type (Enterprise DC and MTDC) and datacenter size.
TECHNOLOGY & BUSINESS INSIGHT REPORTS

NORTH AMERICAN MARKETS
These reports provide an overview of the competitive dynamics in the market, a 451 Research Market Map™ of the competitors in the area, market share of the dominant providers, supply and demand trends, utilization trends and a pipeline of planned leased datacenter builds.

LEASED DATACENTER MARKET REPORT: DALLAS
Analyst: Stefanie Williams
Publication Date: Q1 2021

LEASED DATACENTER MARKET REPORT: SOUTH TEXAS
Analyst: Stefanie Williams
Publication Date: Q1 2021

LEASED DATACENTER MARKET REPORT: TORONTO
Analyst: Jonathan Schroth
Publication Date: Q1 2021

LEASED DATACENTER MARKET REPORT: THE CAROLINAS
Analyst: Dan Thompson
Publication Date: Q1 2021

LEASED DATACENTER MARKET REPORT: MIDWEST
Analyst: Stefanie Williams
Publication Date: Q1 2021

LEASED DATACENTER MARKET REPORT: MONTREAL
Analyst: Jonathan Schroth
Publication Date: Q1 2021

LEASED DATACENTER MARKET REPORT: PORTLAND/HILLSBORO
Analyst: Kelly Morgan
Publication Date: Q1 2021

LEASED DATACENTER MARKET REPORT: NEW ENGLAND
Analyst: Jonathan Schroth
Publication Date: Q2 2021

LEASED DATACENTER MARKET REPORT: NORTHERN VIRGINIA
Analyst: Kelly Morgan
Publication Date: Q2 2021

LEASED DATACENTER MARKET REPORT: SILICON VALLEY
Analysts: Stefanie Williams, Kelly Morgan
Publication Date: Q2 2021

LEASED DATACENTER MARKET REPORT: ATLANTA
Analyst: Stefanie Williams
Publication Date: Q3 2021

LEASED DATACENTER MARKET REPORT: CHICAGO
Analyst: Jonathan Schroth
Publication Date: Q3 2021

LEASED DATACENTER MARKET REPORT: PHOENIX
Analyst: Dan Thompson
Publication Date: Q3 2021

LEASED DATACENTER MARKET REPORT: DALLAS
Analyst: Stefanie Williams
Publication Date: Q4 2021

LEASED DATACENTER MARKET REPORT: NEW YORK/NEW JERSEY
Analyst: Jonathan Schroth
Publication Date: Q4 2021
**EMEA MARKETS**
These reports provide an overview of the competitive dynamics in the market, a 451 Research Market Map™ of the competitors in the area, market share of the dominant providers, supply and demand trends, utilization trends and a pipeline of planned leased datacenter builds.

**LEASED DATACENTER MARKET REPORT: AMSTERDAM**
Analyst: Kelly Morgan  
Publication Date: Q1 2021

**LEASED DATACENTER MARKET REPORT: REST OF EAST AFRICA**
Analyst: Rahiel Nasir  
Publication Date: Q1 2021

**LEASED DATACENTER MARKET REPORT: BRUSSELS**
Analyst: Rahiel Nasir  
Publication Date: Q1 2021

**LEASED DATACENTER MARKET REPORT: FRANCE**
Analyst: Kelly Morgan  
Publication Date: Q1 2021

**LEASED DATACENTER MARKET REPORT: SAUDI ARABIA**
Analyst: Rahiel Nasir  
Publication Date: Q1 2021

**LEASED DATACENTER MARKET REPORT: VIENNA**
Analyst: Daniel Bizo  
Publication Date: Q1 2021

**LEASED DATACENTER MARKET REPORT: LONDON**
Analyst: Kelly Morgan  
Publication Date: Q2 2021

**LEASED DATACENTER MARKET REPORT: WEST AFRICA**
Analyst: Rahiel Nasir  
Publication Date: Q2 2021

**LEASED DATACENTER MARKET REPORT: SOUTH AFRICA**
Analyst: Rahiel Nasir  
Publication Date: Q3 2021

**LEASED DATACENTER MARKET REPORT: GERMANY**
Analysts: Kelly Morgan, Rahiel Nasir  
Publication Date: Q3 2021

**LEASED DATACENTER MARKET REPORT: MADRID**
Analyst: Daniel Bizo  
Publication Date: Q4 2021

**LEASED DATACENTER MARKET REPORT: NORDICS**
Analyst: Kelly Morgan  
Publication Date: Q4 2021

**ASIA-PACIFIC MARKETS**
These reports provide an overview of the competitive dynamics in the market, a 451 Research Market Map™ of the competitors in the area, market share of the dominant providers, supply and demand trends, utilization trends and a pipeline of planned leased datacenter builds.

**LEASED DATACENTER MARKET REPORT: MALAYSIA**
Analyst: Dan Thompson  
Publication Date: Q1 2021

**LEASED DATACENTER MARKET REPORT: AUSTRALIA**
Analyst: Stefanie Williams  
Publication Date: Q2 2021

**LEASED DATACENTER MARKET REPORT: HONG KONG**
Analyst: Dan Thompson  
Publication Date: Q2 2021
**LEASED DATACENTER MARKET REPORT: BEIJING**

**Analyst:** Dan Thompson  
**Publication Date:** Q3 2021

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**LEASED DATACENTER MARKET REPORT: SINGAPORE**

**Analyst:** Dan Thompson  
**Publication Date:** Q3 2021

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**LEASED DATACENTER MARKET REPORT: SHANGHAI**

**Analyst:** Dan Thompson  
**Publication Date:** Q4 2021

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**LEASED DATACENTER MARKET REPORT: JAPAN**

**Analyst:** Dan Thompson  
**Publication Date:** Q4 2021

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**LATIN AMERICAN MARKETS**

These reports provide an overview of the competitive dynamics in the market, a 451 Research Market Map™ of the competitors in the area, market share of the dominant providers, supply and demand trends, utilization trends and a pipeline of planned leased datacenter builds.

**LEASED DATACENTER MARKET REPORT: ARGENTINA**

**Analyst:** Dan Thompson  
**Publication Date:** Q2 2021

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**LEASED DATACENTER MARKET REPORT: CHILE**

**Analyst:** Dan Thompson  
**Publication Date:** Q3 2021

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**LEASED DATACENTER MARKET REPORT: BRAZIL**

**Analyst:** Dan Thompson  
**Publication Date:** Q4 2021

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**OTHER REPORTS**

**LEASED DATACENTER GLOBAL PROVIDERS 2021**

**Analyst:** Stefanie Williams  
**Publication Date:** Q2 2021

This report examines the overall size, scope and growth of the multi-tenant datacenter market globally. This report segments the global market into regions including North America, EMEA, Asia-Pacific and Latin America. It spotlights various prominent global datacenter providers and provides a market outlook for each.

**INTERCONNECTION UPDATE 2021**

**Analyst:** Craig Matsumoto  
**Publication Date:** Q3 2021

This report provides a view of key trends in interconnection, including SDN providers and their impact on the interconnection sector, as well as examples of architecture and case studies for enterprise and service providers interconnecting with cloud providers, partners and customers.

**DIGITAL TRANSFORMATION IN APAC**

**Analyst:** Agatha Poon  
**Publication Date:** Q4 2020

This report provides a perspective on the evolution of digital transformation in APAC, with a specific focus on key trends that are shaping the market dynamics. It also discusses the status of the Chinese startup ecosystem and its role in transforming the cloud landscape.

**PREVIEW: 2022 TRENDS IN DATACENTER SERVICES & INFRASTRUCTURE**

**Analysts:** Kelly Morgan, Dan Thompson, Daniel Bizo, Stefanie Williams, Rahiel Nasir, Jonathan Schroth  
**Publication Date:** Q4 2021

This report provides a view of key trends that will affect the global datacenter market in 2022. It details the top trends, likely impact and recommendations for each.
SPOTLIGHT REPORTS

Q1 2021

Minneapolis datacenters continue to grow (Stefanie Williams)
Subsea fiber: connecting canada to more of Asia, Europe and the US (Jonathan Schroth)
The hills are alive with datacenters: one of the fastest-growing US Markets is Hillsboro, Oregon (Kelly Morgan)

Q2 2021

West Africa poised to take off as a datacenter destination (Rahiel Nasir)
Clouds in Chile: US cloud providers continue to demand datacenter space in Santiago (Dan Thompson)
Northern Virginia maintains its comfortable lead as the top datacenter market in the world (Kelly Morgan)
About 451 Research
451 Research is a leading information technology research and advisory company focusing on technology innovation and market disruption. More than 100 analysts and consultants provide essential insight to more than 1,000 client organizations globally through a combination of syndicated research and data, advisory and go-to-market services, and live events. Founded in 2000, 451 Research is a part of S&P Global Market Intelligence.

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