Internet infrastructure in Europe is relatively mature, but spend continues to grow over time

**Total spend by CAPs on internet infrastructure over various periods since 2011**


<table>
<thead>
<tr>
<th>Year</th>
<th>CAP Spend (EUR billion)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>29</td>
</tr>
<tr>
<td>2012</td>
<td>65</td>
</tr>
<tr>
<td>2013</td>
<td>89</td>
</tr>
<tr>
<td>2014</td>
<td>29</td>
</tr>
<tr>
<td>2015</td>
<td>65</td>
</tr>
<tr>
<td>2016</td>
<td>89</td>
</tr>
<tr>
<td>2017</td>
<td>29</td>
</tr>
<tr>
<td>2018</td>
<td>65</td>
</tr>
<tr>
<td>2019</td>
<td>89</td>
</tr>
<tr>
<td>2020</td>
<td>209</td>
</tr>
<tr>
<td>2021</td>
<td>183</td>
</tr>
</tbody>
</table>

**Examples of investment drivers by cluster**

**HOSTING**

- Growth in cloud zones for five main cloud providers:
  - Google
  - Microsoft
  - Amazon
  - Alibaba
  - Tencent

- The number of cloud zones for five main cloud providers grew by 66% between 2018 and 2022.

**TRANSPORT**

- Growth in submarine cables with CAP investors that land in the region:
  - RFS by 2018: 1
  - RFS by 2022: 8
  - RFS by 2024: 10

- The number of submarine cables with CAP investors that will be ready for service will be 700% higher in 2022 compared to 2018.

**DELIVERY**

- Growth in private peering locations for five main CAPs:
  - Google
  - Microsoft
  - Meta
  - Amazon
  - Netflix

- The number of private peering locations for five main CAPs grew by 30% between 2018 and 2022.

ISPs can achieve cost savings as a result of investments that CAPs make to bring traffic closer to end users, in two main areas:

- CAP investments that enable ISPs to access content at domestic peering locations
- CAP investments to cache content within ISP networks

An estimated EUR950 million can be saved by fixed network ISPs in Europe in 2022, as a result of investments made by CAPs.
For more details please see:

Stay connected
You can stay connected by following Analysys Mason via LinkedIn, Twitter and YouTube.

linkedin.com/company/analysys-mason
@AnalysysMason
youtube.com/AnalysysMason
analysysmason.podbean.com