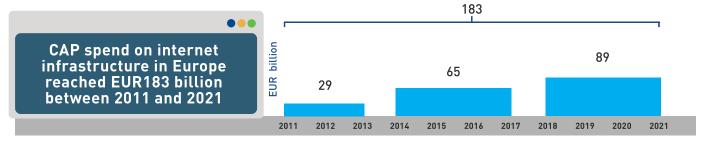
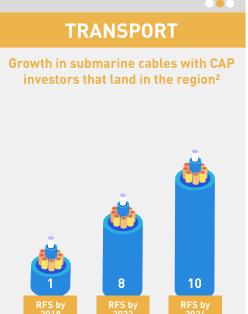
Internet infrastructure in Europe is relatively mature, but spend continues to grow over time

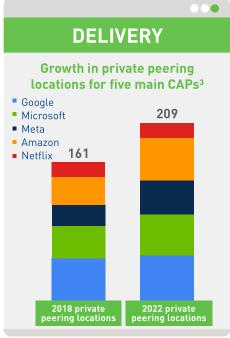
Total spend by CAPs on internet infrastructure over various periods since 2011



Examples of investment drivers by cluster

HOSTING Growth in cloud zones for five main cloud providers¹ Google Microsoft Amazon Alibaba Tencent 68 41





The number of cloud zones for five main cloud providers grew by

66%

between 2018 and 2022

The number of submarine cables with CAP investors that will be ready for service will be

700%

higher in 2022 compared to 2018

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



- 1 Number of cloud availability zones. Sourced from cloud provider websites in mid-2018 and mid-2022.
- 2 Examples of submarine cables with direct CAP investors, Sourced from TeleGeography Submarine Cable Map in mid-2022. 'RFS' refers to 'ready for service'. Submarine cables frequently connect different regions, and adding the figures presented across regions can result in double counting.
- 3 Number of private peering locations. Sourced from PeeringDB in mid-2018 and mid-2022. Please note that the growth in traffic at private peering locations is significantly faster than the growth in number of private peering locations.

For more details please see:

https://www.analysysmason.com/internet-content application-providers-infrastructure-investment-2022



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