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

CAP spend on internet infrastructure in Europe reached EUR183 billion between 2011 and 2021

Examples of investment drivers by cluster

**HOSTING**
Growth in cloud zones for five main cloud providers

- Google
- Microsoft
- Amazon
- Alibaba
- Tencent

2018 cloud zones: 41
2022 cloud zones: 68

**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

**DELIVERY**
Growth in private peering locations for five main CAPs

- Google
- Microsoft
- Meta
- Amazon
- Netflix

2018 private peering locations: 161
2022 private peering locations: 209

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

An estimated EUR950 million can be saved by fixed network ISPs in Europe in 2022, as a result of investments made by CAPs.

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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 TelGeography 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.

Note: Regional estimates of investment are derived by splitting global estimates of investment for each cluster into different regions, based on relevant drivers or indicators for each cluster. Please see Annex B in the main report for more details. Estimates of CAP investment and ISP savings were made in USD, and converted at a ratio of 1:1.159 per EUR, for presentation purposes.
For more details please see:

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