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Data Center Market in Middle East - Industry Outlook and Forecast 2021-2026

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Middle East Data Center Market Report

The Middle East data center market by investment is expected to grow at a CAGR of 7% during the period 2020–2026.

The data center market has observed a steady growth due to the outbreak of the COVID-19 pandemic, resulting in heightened access to internet-related services aided by nationwide lockdowns and restrictions. IoT-enabled devices witnessed high acceptance for monitoring and surveillance purposes, especially in the healthcare sector, during the pandemic. Government agencies have also contributed to the growth of cloud-based services in the Middle East. In Kuwait, the Ministry of Health (MoH), the Central Agency for Information Technology (CAIT), collaborated with Zain to launch an application – Shlonik to monitor citizens that have returned to the country. The growing adoption of cloud, IoT, big data in the wake of the COVID-19 has increased colocation investments in the region. Cloud, social media, and video conferencing service providers have contributed majorly to data generation. Many enterprises operating in the cloud are migrating to colocation data centers to operate hybrid infrastructure services.

The following factors are likely to contribute to the growth of the Middle East data center market during the forecast period:

Smart City Initiatives fueling Data Center Deployments

Submarine Cable Deployment and Impact on Data Center Investment

Big Data, IoT, and Cloud Technology driving Data Center Investments

Migration from On-Premises Infrastructure to Colocation & Managed Service

The study considers the present scenario of the Middle East data center market and its market dynamics for the period 2020?2026. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Middle East Data Center Market Segmentation

The Middle East data center market research report includes a detailed segmentation by IT infrastructure, electrical infrastructure, mechanical infrastructure, cooling technique, cooling systems, general construction, tier standards, geography. The Middle East IT infrastructure market expects to grow at a CAGR of over 6% during 2020–2026. The server market is shifting slowly from rack-based to blade servers to support a high-density operating environment. This is because of the increased usage of IoT, big data analytics, artificial intelligence, and machine learning by enterprises across the Middle Eastern market. Enterprises prefer servers that can reduce space in the data center environment without affecting performance.

The UPS market in the Middle East anticipates to cross USD 89 million during the forecast period. There has a steady rise in the deployment of edge computing; also, colocation operators are investing in the region, which increases the demand for high-capacities UPS in the region. The use of 750?1,500 kVA systems has witnessed high adoption along with less than 500 kVA UPS systems. The adoption of lithium-ion batteries is also likely to increase during the forecast period as the price of these batteries is expected to decline during the forecast period.

Cooling systems, including water-cooled chillers, CRAH, and cooling towers, are installed with N+20 redundancy in the Middle East region. Most facilities in the region design to cool servers via water-based cooling techniques. The growing construction of data centers in the UAE is a key factor in developing multiple chillers, cooling towers, and CRAH units. In Saudi Arabia, data centers' construction will increase the adoption of multiple chillers, cooling towers, and CRAH units. Newly constructed data center facilities will use advanced air-based cooling techniques because of the high temperature. Data centers in Turkey adopt CRAC & CRAH units and chiller units. In terms of redundancy, most operators use N+1 and N+2 cooling redundancy. Besides, operators are likely to deploy dual water feed for efficient and uninterruptable operations.

Brownfield development is more cost-effective than greenfield development in the Middle East. In the Middle Eastern region, data center commissioning service providers follow standard operating procedures, depending on the depth of commissioning required in the facility. The Middle East data center market is mostly dominated by small data centers with less than 15 MW power centers. The building & engineering design market is expected to reach over USD 32 million in 2026, growing at a CAGR of approx—7%. The increasing demand for reliable, efficient, and flexible building infrastructure among service operators is expected to influence its growth. The adoption of physical security apparatus is increasing to protect the data and information. BFSI, telecommunication, and healthcare are the most vulnerable sectors for intrusions and breaches. Sensors and video cameras are installed for surveillance in data centers in the region. The use of artificial intelligence and machine learning in the data center is driving the DCIM solutions market. DCIM solutions improve efficiency, monitor power consumption, and predict system failures. They are becoming a major part of data center operations as they monitor critical elements such as power, cooling, and IT infrastructure.

Most data centers in the UAE are Tier III certified or built according to Tier III standards. Several data centers in Saudi Arabia are built according to Tier III or Tier IV standards and have a minimum redundancy of N+1 in power and cooling infrastructure. Tier III data centers are equipped with UPS systems redundancy of N+1. The majority of modern data centers in Turkey are developed according to Tier III standards, with a minimum of N+1 redundancy in power infrastructure. A few data centers operate 2N power infrastructure or have additional capacity to commission 2N infrastructure solutions based on the customer’s demand. Most developments in Turkey are greenfield projects, whereas modular data centers are confined to enterprise on-premises deployments.

By IT Infrastructure

Servers

Storage

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Network

By Electrical Infrastructure

UPS Systems

Generators

Transfer Switches and Switchgears

PDUs

Other Electrical Infrastructures

By Mechanical Infrastructure

Cooling Systems

CRAC & CRAH Units

Chiller Units

Cooling Towers, Dry Coolers, & Condensers

Other Cooling Units

Racks

Others Mechanical Infrastructure

By Cooling Technique

Air-based Cooling Technique

Liquid-based Cooling Technique

By General Construction

Core and Shell Development

Installation and Commissioning Services

Engineering and Building Designs

Physical Security

DCIM/BMS

By Tier Standards

Tier I & II

Tier III

Tier IV

INSIGHTS BY GEOGRAPHY

Turkey, UAE, and Saudi Arabia are the three largest contributors to the Middle East data center market share. The rising adoption of cloud-based services leads to the growth of retail and wholesale colocation services in the UAE. The market is witnessing an increase in the demand for colocation spaces across existing and upcoming data centers. The rapid investment in 5G technology and its deployment is increasing investments in data centers. Dubai is one of the most preferred locations for data centers in the UAE, followed by Abu Dhabi. Similarly, Saudi Arabia is observing rapid digitalization and automation of business activities. In 2020, over 75% of companies implemented IoT in their applications. The internet penetration in Saudi Arabia was around 95% in 2020. Enterprises across various industries such as banking, financial services, insurance, IT & telecommunications, energy & utilities, media & entertainment, and manufacturing have adopted cloud services, thereby driving the market.

By Geography

Middle Eastern Countries

UAE

Saudi Arabia

Jordan

Turkey

Other Middle Eastern Countries

INSIGHTS BY VENDORS

Arista Network, AWS, Atos, Broadcom, Cisco Systems, and Dell Technologies are among the major IT vendors expanding their presence in the Middle East region. They have a strong physical presence in the region and are the major adopters of high-density, mission-critical servers, storage infrastructure, and network infrastructure. Vendors are focusing on sustainable data centers. They procure renewable energy sources in partnership with local service providers. Construction and design are critical for data center operators because they need to adhere to the Uptime standards.

Key Data Center Critical (IT) Infrastructure Providers

Arista Networks

Atos

Broadcom

Cisco Systems

Dell Technologies

Hewlett Packard Enterprise (HPE)

Huawei Technologies

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IBM

Lenovo

NetApp

Key Data Center Contractors

Atkins

Deerns

ENMAR ENGINEERING

Edarat Group

ISG

RED Engineering

Harinsa Qatar (HQ)

Turner & Townsend

McLaren Construction Group

LAING O'ROURKE

ICS Nett

Linesight

Qatar Site and Power (QSP)

Key Data Center Investors

Amazon Web Services (AWS)

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Akbank

Batelco

Etisalat Group

Equinix

Gulf Data Hub

Turkcell

Telecom Italia Sparkle

Khazna

Zain

KEY QUESTIONS ANSWERED

1. How big is the Middle East data center market?
2. What factors are driving the data center market in the Middle East?
3. What opportunities are offered in the UAE data center market?
4. What is the Middle East data center market growth?
5. What factors are enabling the growth of colocation service providers in the region?

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