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Middle East and North Africa (MENA) Data Center Market - Industry Outlook & 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 and North Africa Data Center Market Report

The Middle East and North Africa data center market by investment is expected to grow at a CAGR of 8% during the period 2020–2026.

The increased commercial 5G network deployment has led to the increased demand for high bandwidth internet in several Middle Eastern Tier II and Tier III cities. Edge data centers will create a decentralized data center model, where hyperscale facilities will connect multiple edge data centers. Saudi Arabia has been a leader in expanding its 5G networks, where telecom companies Zain, Saudi Telcom Company, and MOBILY are significant contributors to the market. Zain provides 5G access across 44 cities, followed by Saudi Telecom Company in 22 cities, and MOBILY in 21 cities. TAWAL, a Saudi ICT infrastructure company, has partnered with Nokia to provide turnkey services to expand and deploy 5G for TAWAL's infrastructure in Saudi Arabia. Nokia's 5G technology will be added in over 670 4G sites operated by TAWAL across Saudi Arabia. Nokia will also replace existing towers with newer ones in 2021. In January 2021, Zain deployed Phase II of its 5G deployment in Saudi Arabia in collaboration with Infovista, a network infrastructure company, and its radio planning portfolio. In the UAE, du, a major telecom operator, has partnered with Ericsson to transform its RAN 5G network using Ericsson's Radio System portfolio. Also, Etisalat deployed 5G Fixed Network in homes in the UAE in September 2020. Hence, these deployments will continue to drive innovations in the data center power space, with increased modular infrastructure offerings. In North Africa, governments and telecom operators are working toward deploying 5G in the next few years. Huawei is collaborating with telecommunications companies such as Maroc Telecom, Orange, and Inwi, to roll out 5G network services in

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Morocco.

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

Smart City Initiative fueling Data Center Deployments

Impact of COVID-19 on Data Center Market

Big Data, IoT & Cloud Driving Data Center Investment

Development of Modular Data Centers

The study considers the present scenario of the Middle East and North Africa 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.

MENA Data Center Market Segmentation

The MENA data center market research report includes a detailed segmentation by IT infrastructure, electrical infrastructure, mechanical infrastructure, cooling systems, cooling technique, general construction, tier standards, geography. The Middle East and North Africa (MENA) server market are witnessing growth due to the growth in data traffic. The demand for ODM servers is increasing in the market. Data center operators are adopting the IT infrastructure to match high-end data processing requirements. The server market is slowly shifting to blade servers to support a high-density operating environment due to the increased usage of IoT, big data analytics, artificial intelligence, and machine learning by enterprises in the region.

UPS systems are being widely adopted to provide backup power for cooling systems installed in the facility. The adoption of lithium-ion batteries is likely to increase during the forecast period as their price will decline. In the UAE, the market is observing the adoption of N+1 redundant UPS systems. Data center operators will increasingly use renewable energy to power facilities. Most facilities are equipped with up to 500 kVA UPS systems powered mostly by VRLA batteries with N+1 redundant configuration in Turkey. The market will witness the adoption of diesel generators and transfer switches

& switchgear with minimum N+N redundancy across data centers. It is expected that the demand for monitored and metered PDUs will grow during the forecast period due to the need to reduce OPEX across data centers. In Morocco, facilities have adopted power generators (equipped with on-site fuel reserve), dedicated transformer stations, modular inverters, and modular distribution boards.

The MENA data center market by mechanical infrastructure is expected to reach over USD 200 million by 2026. The adoption of cooling units highly depends on the IT load, rack density, and cooling systems design. Cooling systems and IT infrastructure are the predominant power consumers in data centers. Operators have adopted several innovations such as energy-efficient cooling infrastructure solutions to increase operational efficiency, reduce power consumption, and decrease carbon emissions. In terms of cooling systems, the use of free cooling techniques has grown significantly over the past few years across a few regions with favorable climatic conditions that can utilize evaporative/adiabatic coolers for cooling purposes. However, most facility developments in regions with tropical climatic conditions continue to use chilled water-based and air-cooled systems along with chiller units, cooling towers, dry coolers, condensers, and CRAC/CRAH units.

Most data centers in the region are designed to cool servers through water-based cooling techniques. The growing data center construction is a factor for adopting multiple chillers, cooling towers, and CRAH units. In Saudi Arabia, newly constructed facilities are likely to use advanced air-based cooling techniques because of the high temperature and less chance of availability of free cooling solutions. However, data centers that are built as part of commercial deployment include air-based cooling systems. The facilities in Turkey are adopting CRAC & CRAH units and chiller units. In terms of redundancy, most operators use N+1 and N+2 cooling redundancy for Tier III facilities. In addition, operators are likely to deploy dual-water feeds for efficient and uninterruptable operations.

Several global construction contractors offer their services in the MENA. Brownfield development is more cost-effective than greenfield development since the building is already built and only the installation needs to be done. Many facilities offer 24X7 onsite support, which includes security, maintenance, and smart hands teams. In addition, data centers are equipped with disaster recovery systems. Smaller facilities mainly dominate the Middle East and North Africa data center market with a power capacity of less than 15 MW. In the Middle East & North Africa, most facilities are operated by telecommunication operators. Therefore, various sensors, and video cameras are installed for surveillance in the data center to secure the datas. The market for physical security products has witnessed significant growth in recent years.

Tier I and Tier II data centers have reduced significantly over the past five years because of the increased awareness of redundant infrastructure in the MENA region. A majority of under-developed projects across the Middle Eastern & North Africa region fall under the Tier III category. Most data centers in the UAE are certified as Tier III facilities. In Turkey, modern data centers are developed according to Tier III standards, with a minimum of N+1 redundancy in power infrastructure. A few facilities operate 2N power infrastructure or have provisioned additional capacity to commission 2N infrastructure solutions based on the customer's demand. Tier IV facilities are mainly built by hyperscale developers such as Facebook, Apple, Microsoft, and Google and major colocation providers worldwide. KKB Kredi Kayit Burosu A.S.'s KKB Anadolu Veri Merkezi data center is designed as per Tier IV standards.

By IT Infrastructure

- Servers
- Storage
- 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

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Tier IV

INSIGHTS BY GEOGRAPHY

The UAE and Turkey account for the largest revenue contribution to the MENA data center market share. The adoption of cloud-based services leads to the growth of retail and wholesale colocation services in the region. 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 leads to the generation of a substantial amount of data, further increasing investments in the facilities. The UAE is one of the growing markets for renewable energy products. The UAE works toward the installation of 42 GW of renewable energy in the country by 2050. Dubai aims to commission a five-part renewable energy project and is currently setting up an 800 MW solar park in the country. All these factors are likely to increase the demand for data center services in the country. Turkey is one of the emerging data center market, wherein increasing digitization has become a significant driver for data center investment over the last few years. Most investments come from the telecommunications sector due to increasing smartphone users in the country. The market is evolving, and investments are expected to pick up during the forecast period, with contributions from local and global data center providers. Government initiatives, cloud services, and submarine cables will be the prominent drivers for investments in Turkey.

By Geography

- Middle East & Africa
  - UAE
  - Saudi Arabia
  - Turkey
  - Jordan
  - Morocco
  - Egypt

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Other Middle East and North African Countries

INSIGHTS BY VENDORS

The Middle East and North Africa data center market consists of a host of IT, electrical, & mechanical infrastructure providers and general contractors. The market is witnessing a massive increase in data usage by consumers using services offered by companies in the e-commerce, social media, and entertainment industries. Digital services provided by the BFSI and government sectors are also critical enablers for data growth in the market. In terms of electrical infrastructure, the data center market in the Middle East & North Africa witnessed increasing competition amongst the power infrastructure providers. Data center operators are looking to procure energy-efficient power infrastructure solutions. Over the next few years, operators will consider adopting lithium-ion batteries, fuel cell technology, and intelligent PDUs to improve the facility's efficiency.

Key Data Center Critical (IT) Infrastructure Providers

- Arista Networks
- Atos
- Broadcom
- Cisco Systems
- Dell Technologies
- Hewlett Packard Enterprise (HPE)
- Huawei Technologies
- Juniper Networks
- IBM
- Lenovo

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NetApp

Key Data Center Support Infrastructure Providers

ABB

Caterpillar

Cummins

Eaton

Envicool

Legrand

Rittal

Rolls-Royce Power Systems

Schneider Electric

STULZ

Vertiv Group

Key Data Center Investors

Amazon Web Services (AWS)

Akbank

Batelco

Etisalat Group

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Equinix

Gulf Data Hub

Dubai Electricity & Water Authority (DEWA)

N+ONE

Orange

Raya Data Center

Turkcell

Telecom Italia Sparkle

Khazna

Zain

Key Construction Constructors

Arup Group

Atkins

Deerns

ENMAR ENGINEERING

Edarat Group

ISG

RED Engineering

Harinsa Qatar (HQ)

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Turner & Townsend

McLaren Construction Group

LAING O'ROURKE

ICS Nett

Linesight

Qatar Site and Power (QSP)

KEY QUESTIONS ANSWERED:

1. How big is the Middle East and North Africa (MENA) data center market?
2. What is the impact of COVID-19 on the MENA data center market?
3. What are the trends and drivers enabling the data center market growth?
4. What is the growth rate of the MENA data center market?
5. Who are the key data center investors in the market?

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