

# Singapore Data Center Market - Investment Analysis and Growth Opportunities 2021-2026

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## Abstracts

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

Singapore data center market size will witness investments of USD 5 billion by 2026

According to the Government Technology Singapore, the government spent around USD 3.5 billion on ICT procurement in FY20, focusing on the development of new tech tools to respond to the COVID-19 pandemic, the development of citizen- and business-centric digital services, development of ICT systems on the cloud region, modernization of government ICT infrastructure; and application of data analytics, artificial intelligence (AI) and sensors in the public sector. With the internet penetration of 85% and the broadband speed pegged over 200 Mbps, Singapore has the highest average broadband speeds in Southeast Asia. The country accounted for over 40% of the data center area developed in Southeast Asia in 2020. The demand for data centers has also heightened the use of the existing data center capacity (MW) in the market, with colocation service providers witnessed a strong uptake for their data center spaces by existing customers. Cloud service providers and video conferencing service providers have contributed majorly toward colocation uptake archiving.

The report considers the present scenario of the Singapore data center market and its market dynamics for the forecast period 2021-2026. It covers a detailed overview of several growth enablers, restraints, and trends in the market. The study includes the demand and supply aspects of the market.

Key Highlights of The Report:

Over 30% of organizations have implemented cloud computing in Singapore due to the increased demand for data services from consumers and the growth in connected devices

The public cloud market spending crossed USD 2 billion in 2020, and is expected to grow significantly during the forecast period

Facebook invests in its first self-built facility in Singapore, which is likely to be operational by 2022

The Singapore region accounted for over 40% of the data center area developed in Southeast Asia in 2020

IoT-enabled devices have witnessed a high demand for monitoring and surveillance services with the outbreak of the COVID-19 pandemic, especially in the healthcare sector

The onset of the COVID-19 pandemic has increased the demand for data center services owing to the increase in internet-related services and the shift to remote working by organizations

The Electricity regulator Energy Market Authority (EMA) plans to import 100 MW of green energy from Malaysia by the end of 2021 to promote the consumption of green energy in Singapore.

AWS is building its first renewable power project in the region to generate over 60 MW of power.

Fuel cells can be installed in the facilities in Singapore to reduce the OPEX for operators.

## Singapore Data Center Market Insights

In 2020, the implementation of 5G and the increased usage of the internet increased the demand for cloud-based storage solutions among organizations in Singapore

Data centers adopt higher bandwidth switches at the aggregator layer, which includes 40/100 GbE switch ports

The demand for SDDs and NVMe SDDs is growing from cloud service providers and managed hosting providers in the country

The adoption of (DRUPS) Diesel Rotary Uninterruptible Power Supply systems, including flywheel UPS and diesel generators, is high among the service providers in Singapore

The implementation of the carbon tax in the region has prompted data center operators to opt for high-efficient gas generators to reduce carbon emissions.

Lithium-ion battery solutions with low CAPEX than traditional VRLA systems are observing high adoption in the facilities.

## Singapore Data Center Market Insights

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emissions.

Lithium-ion battery solutions with low CAPEX than traditional VRLA systems are observing high adoption in the facilities.

The emergence of nickel-zinc batteries and the high adoption of 48V DC UPS systems will also provide a major boost to the Singapore data center market share.

Increased deployment of artificial intelligence and machine learning workloads will increase the application of liquid-immersion and direct-to-chip cooling systems.

## Singapore Data Center Market Vendor Landscape

A host of IT infrastructure providers, construction contractors, support infrastructure providers, and investors constitute the Singapore data center market. Vendors are involved a flurry of infrastructure and construction activities. Arista Networks, Broadcom, Cisco Systems, Dell Technologies, Hewlett and Packard Enterprise (HPE) are some of the leading IT infrastructure providers. The market also witnessed the entry of new player Stratus DC Management, which has planned data center development in Singapore.

### IT Infrastructure Providers

Arista Networks

Broadcom

Cisco Systems

Dell Technologies

Hewlett Packard Enterprise (HPE)

Huawei Technologies

IBM

Inspur

Lenovo

MiTAC Holdings

NetApp

Quanta Cloud Technology

Wistron (Wiwynn)

#### Construction Service Providers

Arup Group

AWP Architects

Aurecon Group

AECOM

Cundall

DSCO Group

Fortis Construction

Faithful+Gould

Gammon Construction

HDR (Hurley Palmer Flatt)

Kienta Engineering Construction

LSK Engineering

M+W Group (EXYTE)

NTT FACILITIES GROUP

PM Group

Sato Kogyo

### Support Infrastructure Providers

ABB

Bosch Security Systems (Robert Bosch)

Caterpillar

Cummins

Eaton

Fuji Electric

HITEC Power Protection

KOHLER-SDMO

Legrand

Mitsubishi Electric Corporation

Piller Power Systems

Rolls-Royce Power Systems

Rittal

Schneider Electric

Vertiv Group

## Data Center Investors

AirTrunk Operating

BDx (Big Data Exchange)

Digital Realty

Equinix

Facebook

Iron Mountain

NTT Global Data Centers

Keppel Data Centres

ST Telemedia Global Data Centres

## Report Coverage:

This report on the Singapore Data Center market offers an elaborative analysis of the existing and upcoming facilities, datacenter investments in terms of IT, electrical, mechanical infrastructure, general construction, and geography. It discusses market sizing and estimation for different segments with respect to the investment in the facilities. The segmentation includes:

### Existing Vs Upcoming Data Centers

Existing Facilities in the region (Area and Power Capacity)

South

East

North

List of Upcoming Facilities in the region (Area and Power Capacity)

## Singapore Data Center Investment Coverage

### Infrastructure Type

IT Infrastructure

Electrical Infrastructure

Mechanical Infrastructure

### IT Infrastructure

Server

Storage

Network

### Electrical Infrastructure

Uninterruptible Power Supply (UPS)

Generators

Transfer Switches and Switchgears

PDUs

Other Electrical Infrastructure

### Mechanical Infrastructure



Cooling Systems

Rack Cabinets

Other Mechanical Infrastructure

General Construction

Building Development

Installation & Commissioning Services

Building Design

Physical Security

DCIM

Tier Segments

Tier I & Tier II

Tier III

Tier IV

Geography

Singapore

Target Audience

Datacenter Real Estate Investment Trusts (REIT)

Datacenter Construction Contractors

Datacenter Infrastructure Providers

New Entrants

Consultants/Consultancies/Advisory Firms

Corporate and Governments Agencies

## Why Should You Buy This Research?

Market size available in the area, power capacity, investment, and colocation revenue.

An assessment of the Singapore data center investment in the market by colocation, hyperscale, and enterprise operators

Data center investments in terms of area (square feet) and power capacity (MW) across cities in the country

A detailed study of the existing Singapore data center market landscape, an in-depth industry analysis, and insightful predictions about the Singapore data center market size during the forecast period

Snapshot of existing and upcoming third-party facilities in Singapore

Facilities Covered (Existing): 38

Facilities Identified (Upcoming): 4

Coverage: 3 Regions

Existing vs Upcoming (Data Center Area)

Existing vs Upcoming (IT Load Capacity)

Data center colocation market in Singapore

Market Revenue & Forecast (2020-2026)

Retail Colocation Pricing

Wholesale Colocation Pricing

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