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Data Centre Emerging Markets 2016 to 2019

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Abstracts

The TCL Emerging Markets Data Centre – from 2016 to 2021 report is an extensively revised report based on the last TCL Emerging Markets Data Centre – 2015 to 2020 report - which was first published in early 2015.

This 2016 version of the report has been extensively revised - with seven large new country markets added - including the markets of: Brazil, Ghana, India, Kenya, Mexico, Nigeria & South Africa.

All of the new Country Markets have been selected on the amount of potential forecast future growth coupled with the arrival of new Carrier Neutral Data Centre specialists as a sign of market maturity. New Carrier Neutral Data Centre facilities are developed as the IT segment reaches maturity, with the initial Data Centre facilities typically being Carrier Based (Telecoms Provider) facilities.

TCL has also updated the profiles for the Bulgaria, Russia, South Africa and Turkey country markets, which remain in the report from 2015. However, TCL has omitted the smaller Data Centre Country Markets of Croatia, Macedonia, Montenegro, Serbia and the Ukraine from the 2016 report, the information on these markets will be part of the Appendix.

The forecasts for Data Centre space and pricing in the report are based on a “bottom up” approach. Every known Data Centre provider in each country has been included in the research analysis to provide a total base line Data Centre raised floor capacity and Data Centre Customer Power (in m2 and MW respectively) and with pricing for each country market.

Altogether almost 200 Data Centre providers of rack space are included in the TCL survey across the 10 countries – with approximately 353 identified Data Centre facilities

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included altogether (as some Data Centre operators have multiple facilities in some countries) with a total of over 502,000 m2 of Data Centre raised floor space and 702 MW of Data Centre Customer Power (DCCP) as of the end of 2016.

Country Coverage

Bulgaria, Brazil, Ghana, India, Kenya, Mexico, Nigeria, Russia, South Africa, Turkey (TCL provides additionally the profiiles of the 2015 covered markets including Croatia, Macedonia, Montenegro, Serbia and the Ukraine).

Types of Data Centres covered

Carrier Based Data Centres facilities

Carrier Neutral Data Centre facilities

(It excludes “self-build” enterprise Data Centre facilities from the survey and focuses purely on 3rd party Data Centre facilities that provide colocation services.)

Forecast:

TCL produced a 5 year forecast for each country market based on projected space capacity growth, Data Centre equipped utilization levels and price increases in Data Centre stock for the period from the beginning of 2015 to the beginning of 2020. Each country market has a 5 year forecast for Data Centre raised floor capacity and Data Centre Customer Power (DCCP).

TCL also provides a forecast for Data Centre rack space and m2 pricing at the end of 2016 – as well as a 5 year forecast for rack space pricing and per m2 suite pricing and capacity from the end of 2016 to the end of 2021.

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