

Indonesia Data Center Market - Investment Analysis & Growth Opportunities 2022-2027

Market Report | 2022-06-20 | 107 pages | Arizton Advisory & Intelligence

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Report description:

Indonesia's Data Center market is expected to grow at a CAGR of 5.46% during 2022-2027.

- In Indonesia, Jakarta is a preferred location with better network connectivity and proximity to the end-users to improve the latency.
- Due to the COVID-19 pandemic, the country is witnessing growth in cloud adoption by various industry verticals such as enterprises, government agencies, and education sectors. Therefore, AWS, Microsoft, Google, and Alibaba Cloud are some cloud service providers that have a presence in the country.
- Telecom operators, followed by colocation operators, dominate Indonesia's data center market. Also, the Indonesian data center market is witnessing the entry of new investors, such as Data Center First plans to build data centers in the country.
- According to the Ministry of Finance Indonesia, the government provides tax incentives to the data center industry to invest in Indonesia. With more than \$2.10 billion investment will get a tax reduction for around 20 years.
- The data center operators are procuring renewable energy to operate their operations. For instance, DCI Indonesia opened its first phase in the H2 data center campus with a power capacity of around 15 MW, and the campus will be powered by solar farms built inside the campus.
- In Indonesia, Free Trade Zones attract data center operators to invest in the country by enabling various tax incentives for the data centers constructed in the FTZs. In November 2021, GDS Services acquired land in Nongsa Digital Park to build two data center buildings with 107,600 square feet and a power capacity of around 28 MW.

KEY HIGHLIGHTS OF THE REPORT

- Indonesia has over 65 operational colocation data centers. Most colocation data centers are being developed according to Tier III standards. According to Uptime Institute, over 45 data center facilities are certified under tier III standards by the uptime institute.
- The major demand drivers for colocation services in Indonesia are industries such as cloud service providers, telecom service providers, 5G deployment, and growing AI.

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- According to the Ministry of Communication and Informatics, public entities must establish data centers inside Indonesia.
- To improve and boost the digital economy of Indonesia, the government launched the Digital Indonesia Roadmap 2021-2024, which accelerates the growth of digital transformation in the country.
- In Indonesia, the telecom operators are working towards deploying commercial 5G services by the companies such as Telkomsel and Indosat.
- The deployment of 5G networks will boost the digital economy of the region and will lead to higher demand for high-bandwidth networking infrastructure. For instance, Amazon Web Services (AWS) supports its customers with an edge data center facility in Jakarta.

INDONESIA DATA CENTER MARKET VENDOR LANDSCAPE

- Some of the key investors in the Indonesia data center industry are DCI Indonesia, DTP, Keppel Data Center, Telekom Indonesia, and Biznet Data Center.
- In Indonesia, we expected the demand for edge data centers to grow as 5G deployment increases. In October 2021, PT Ekagrata Data Gemilang opened an edge data center, EDGE1, with a power capacity of 6 MW and a rack capacity of around 1,300.
- The telecom operators are joining hands with foreign investors to build data centers in the country. For instance, in November 2021, the telecom operator Smartfren signed an MoU with UAE-based technology company G42 group to build a 1,000 MW data center in Indonesia.
- ABB's infrastructure provider delivered UPS systems PowerWave 33 to IndoKeppel Data Centers in Jakarta, Indonesia.

Major Vendors

IT INFRASTRUCTURE PROVIDERS

- Cisco
- Dell Technologies
- Fujitsu
- Hewlett Packard Enterprise
- IBM
- Inspur
- Lenovo

DATA CENTER CONSTRUCTION CONTRACTORS & SUB-CONTRACTORS

- Asdi Swasatya
- AWP Architects
- DSCO Group
- NTT Facilities

SUPPORT INFRASTRUCTURE PROVIDERS

- ABB
- Caterpillar
- Cummins
- Cyber Power Systems
- Delta Electronics
- Eaton
- Fuji Electric
- HITEC Power Protection
- Legrand
- Mitsubishi Electric

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- Pillar Power Systems
- Rolls-Royce
- Schneider Electric
- STULZ
- Vertiv Group

DATA CENTER INVESTORS

- DCI Indonesia
- DTP
- Keppel Data Centres
- Biznet Data Center
- NTT Global Data Centers
- Space DC
- Princeton Digital Group (PDG)

NEW ENTRANT

- Data Center First

WHY SHOULD YOU BUY THIS RESEARCH?

- Market size available in the investment, area, power capacity, and the Indonesia colocation market revenue.
- An assessment of the data center investment in Indonesia by colocation, hyperscale, and enterprise operators.
- Data center investments in the area (square feet) and power capacity (MW) across cities.
- A detailed study of the existing Indonesia data center market landscape, an in-depth industry analysis, and insightful predictions about the Indonesia data center market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in Indonesia
 - o Facilities Covered (Existing): 66
 - o Facilities Identified (Upcoming): 10
 - o Coverage: 14 Cities
 - o Existing vs. Upcoming (Data Center Area)
 - o Existing vs. Upcoming (IT Load Capacity)
- Data center colocation market in Indonesia
 - o Market Revenue & Forecast (2021-2027)
 - o Retail Colocation Price
- The Indonesia data center landscape market investments are classified as IT, power, cooling, and general construction services with sizing and forecasting.
- A comprehensive analysis of the latest trends, growth rate, potential opportunities, growth restraints, and prospects for the industry.
- Business overview and product offerings of prominent IT infrastructure providers, construction contractors, support infrastructure providers, and investors operating in the industry.
- A transparent research methodology and the analysis of the demand and supply aspect of the market.

EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the region(Area and Power Capacity)
 - o Jakarta
 - o Other Cities
- List of Upcoming Facilities in the region(Area and Power Capacity)

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REPORT COVERAGE:

This report analyses the Indonesia data center market share. It elaboratively analyses the existing and upcoming facilities and investments in IT, electrical, mechanical infrastructure, general construction, and tier standards. It discusses market sizing and investment estimation for different segments. The segmentation includes:

- IT Infrastructure
 - oServers
 - oStorage Systems
 - oNetwork Infrastructure
- Electrical Infrastructure
 - oUPS Systems
 - oGenerators
 - oSwitches & Switchgears
 - oPDUs
 - oOther Electrical Infrastructure
- Mechanical Infrastructure
 - oCooling Systems
 - oRack Cabinets
 - oOther Mechanical Infrastructure
- Cooling Systems
 - oCRAC and CRAH Units
 - oChillers Units
 - oCooling Towers, Condensers, and Dry Coolers
 - oOther Cooling Units
- General Construction
 - oCore & Shell Development
 - oInstallation & Commissioning Services
 - oEngineering & Building Design
 - oFire Detection & Suppression Systems
 - oPhysical Security
 - oData Center Infrastructure Management (DCIM)
- Tier Standard
 - oTier I & Tier II
 - oTier III
 - oTier IV

KEY QUESTIONS ANSWERED

1. What will be the market size of the Indonesia data center market?
2. How many data centers are there in Indonesia?
3. What are the driving factors of the Indonesian data center market?
4. What are the key trends in the Indonesian data center market?
5. Who are key investors in the market in 2022?

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