

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

Market Report | 2022-12-07 | 93 pages | Arizton Advisory & Intelligence

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Report description:

Turkey data center market is expected to grow at a CAGR of 8.43% during 2021-2027.

MARKET OVERVIEW

In Turkey, Istanbul is the prominent data center hub, and the city hosts the maximum number of data centers in the country. The business capital is an intersection connecting Asia and Europe. Most of the country's data centers use some form of renewable or green sources to power them. Turkcell facility in Tekirdag uses solar panels spanning 12,900 square feet to power the facility. The country aims to reduce carbon emissions by 35% by 2030.

Turkey is well connected to other parts of the world through submarine cables. There are currently six submarine cables under operation in the country, namely MedNautilus Submarine System, KAFOS, SeaMeWe-3, SeaMeWe-5, Turcyos-1, and Turcyos-2. Public and private enterprises are seen shifting their workloads to the cloud, which increases demand significantly for colocation data center investments and developments in the country. Technology Development Zones (TDZ) has been set up to offer start-ups incentives and other benefits. The tax incentives focusing solely on effective data center investments and operations will likely grow during the forecast period.

KEY HIGHLIGHTS

- a) Turkey is an emerging data center market in the Middle East and acts as a bridge between Asia and Europe. The growing demand for smart devices, analytics, cloud adoption, and the growth of wireless networking technologies are a few factors driving the country's market.
- b) The country is investing highly in renewable energy. Operators are procuring renewable energy to be used inside their facilities to achieve sustainability goals. For instance, Turkcell acquired a wind farm with a capacity of 18 MW in Turkey.
- c) Free Zones (FZ) are prevalent in Turkey, which helps to promote the exports of goods and services. The country has a presence of 21 FZ, which help to provide complete exemption from customs duties, real-estate taxes, used machines, and others.
- d) Digital investments will significantly increase with the Turkish Government's 2019-2023 plan and 5G expansion fueled by trials

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and incentives provided for it. The ICT sector is expected to grow with the transition to 5G and next-gen technologies, attracting more data center investments into the country.

e) Several smart city projects are ongoing in the country, which provides opportunities for foreign investors to provide smart applications and other services. The green city program is also underway in cities such as Istanbul, Izmir, and Ankara.

WHY SHOULD YOU BUY THIS RESEARCH?

- Market size available in the investment, area, power capacity, and the Turkey colocation market revenue.
- An assessment of the investment in Turkey by colocation and enterprise operators.
- Investments in the area (square feet) and power capacity (MW) across locations in the country.
- A detailed study of the existing market landscape, an in-depth industry analysis, and insightful predictions about the Turkey data center market size during the forecast period.
- Snapshot of existing and upcoming third-party data center facilities in Turkey
 - o Facilities Covered (Existing): 31
 - o Coverage: 2+ Cities
 - o Existing vs. Upcoming (Area)
 - o Existing vs. Upcoming (IT Load Capacity)
- Data center colocation market in Turkey
 - o Market Revenue & Forecast (2021-2027)
 - o Wholesale vs. Retail Revenue & Forecast (2021-2027)
 - o Retail Colocation Pricing
 - o Wholesale Colocation Pricing
- The Turkey market landscape investments are classified into IT, power, cooling, and general construction services with sizing and forecast.
- 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 aspects of the market.

VENDOR LANDSCAPE

- Colocation providers such as Equinix and Telehouse and telecom operators such as Telecom Italia Sparkle, Turkcell, Vodafone, Turk Telekom, and Teknotel Telekom are some of the main colocation operators in the Turkey data center market.
- Global colocation service providers expect to enter the Turkey data center market by entering into strategic partnerships with local enterprises. For instance, Telehouse operates a data center in Turkey in partnership with Teknotel Telekom.
- The construction contractors in the country have both global as well as local presence, which is supplying to significant operators present in the Turkey data center market. Arup, ENMAR ENGINEERING, Deerns, Prota Engineering, and RED are the major contractors and subcontractors in the country.

Major Vendors

IT Infrastructure Providers

- Arista Networks
- Atos
- Broadcom
- Cisco Systems
- Dell Technologies
- Hewlett Packard Enterprise

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- [H]uawei Technologies
- [I]BM
- [I]nspur
- [J]uniper Networks
- [L]enovo

Data Center Construction Contractors & Sub-Contractors

- [A]ECOM
- [A]nel Group
- [A]rup
- [D]eerns
- [E]nmar Engineering
- [H]ill International
- [M]ace
- [M]anco Architects
- [P]rota Engineering
- [R]ED

Support Infrastructure Providers

- [A]BB
- [A]iredale International Air Conditioning
- [A]lfa Laval
- [C]anovate
- [C]aterpillar
- [C]ummins
- [E]AE
- [E]aton
- [G]rundfos
- [H]ITEC Power Protection
- [L]egrand
- [R]ittal
- [R]olls-Royce
- [S]chneider Electric
- [S]iemens
- [S]TULZ
- [V]ertiv

Data Center Investors

- [E]quinix
- [N]GN
- [P]ENDC
- [T]elehouse
- [T]urkcell
- [T]urk Telekom

EXISTING VS. UPCOMING DATA CENTERS

- [E]xisting Facilities in the region (Area and Power Capacity)

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- o Istanbul
- o Other Cities (Ankara, Bursa, Denizli, Izmir, and Tekirdag)
- List of Upcoming Facilities in the region (Area and Power Capacity)

REPORT COVERAGE:

This report analyses the Turkey 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
 - o Servers
 - o Storage Systems
 - o Network Infrastructure
- Electrical Infrastructure
 - o UPS Systems
 - o Generators
 - o Transfer Switches & Switchgears
 - o PDUs
 - o Other Electrical Infrastructure
- Mechanical Infrastructure
 - o Cooling Systems
 - o Rack Cabinets
 - o Other Mechanical Infrastructure
- Cooling Systems
 - o CRAC & CRAH Units
 - o Chiller Units
 - o Cooling Towers, Condensers & Dry Coolers
 - o Other Cooling Units
- General Construction
 - o Core & Shell Development
 - o Installation & commissioning Services
 - o Engineering & Building Design
 - o Fire Detection & Suppression Systems
 - o Physical Security
 - o Data Center Infrastructure Management (DCIM)
- Tier Standard
 - o Tier I & Tier II
 - o Tier III
 - o Tier IV

KEY QUESTIONS ANSWERED

1. How big is Turkey data center market?
2. What is the growth rate of the Turkey data center market?
3. How much MW of power capacity will be added across Turkey during 2022-2027?
4. Who are the key vendors in the Turkey data center market?
5. Which all cities are included in Turkey data center market report?

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