

## **Africa Data Center Construction Market - Industry Outlook & Forecast 2023-2028**

Market Report | 2023-05-17 | 310 pages | Arizton Advisory & Intelligence

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### **Report description:**

The Africa data center construction market is expected to grow at a CAGR of 10.70% during 2022-2028.

### **KEY HIGHLIGHTS**

- In the African data center construction market, South Africa is the major contributor to the capacity in the region, with more than 50%, followed by Nigeria, Kenya, and other African countries. Cloud-based services, smart city developments, and fiber connectivity drive continuous regional data center investments.
- The region's major global cloud service providers include Amazon Web Services, Microsoft, Google Cloud, Oracle, and Huawei Technologies. For instance, in September 2022, Google Cloud announced its plan to open a new cloud region in Cape Town, South Africa. The cloud region is expected to be operational in the next 2-3 years.
- The Africa data center construction market grows continuously in terms of connectivity by deploying new submarine cables such as Africa-1, 2Africa, India Europe Xpress (IEX), Equiano, and Medusa Submarine Cable System SeaMeWe - 6, which are expected to be ready for services during the forecast period.

### **MARKET TRENDS**

#### **Deployment of 5G Technologies**

- The introduction of the 5G network in Africa is likely to generate a substantial amount of data, which will further lead to increasing investments in the African data center construction market. High internet connectivity, bandwidth, and less processing time is the feature of 5G technology. The countries like South Africa, Nigeria, Kenya, Egypt, and Ethiopia, have witnessed the commercial launch of the 5G network in the region, while the countries like Ghana, Algeria, Tanzania, and Congo were in the initial stages of their development.
- Vodacom, MTN, Ericsson, Orange, Ethio Telecom, and Rain are the main telecom operators in Africa involved in the commercial deployment of 5G services that partially or entirely cover 5G services in the country. Several pilot 5G projects are underway and

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expected to be deployed in the forecasted period.

## Procurement of Renewable Energy Sources

-□Due to the unavailability of proper power infrastructure in the African region, the facilities were forced to develop their renewable energy infrastructure for power generation.

I.□MTN, a South Africa-based telecom company, operates four data centers in Kenya and other African countries, uses renewable energy to power its facilities, and targets carbon neutrality by 2040. It has introduced the "Project Zero" program.

II.□In June 2022, Vantage Data Centers signed 20 years Power Purchase Agreement (PPA) with SolarAfrica in which the company will procure 87 MWp of solar energy that will be used to power its new facility.

-□The African region also has abundant availability of solar energy, like the Middle Eastern region. In contrast, most African countries are undertaking renewable energy strategies & visions to develop renewable energy projects and meet the carbon-neutral goals set by respective governments in the region.

I.□In July 2022, the Nigerian government made a statement regarding its commitment to the sustainability goal for 2030. The government is planning to generate 30 GW of electricity from renewable sources by generating renewable energy as 30% of its total production.

II.□Egypt expects to increase the share of electricity produced from renewable sources to 42% by 2035.

## SEGMENTATION INSIGHTS

-□Data centers are investing in power infrastructure with a minimum of N+1 redundancy. In 2022, UPS systems accounted for a market share of more than 30% of the total electrical infrastructure in data centers.

-□The Africa data center construction market is investing in cooling infrastructure due to the high-temperature climate in some African countries. In 2022, cooling systems service providers invested a share of more than 65% of the total mechanical infrastructure.

-□The region witnessed growth in the deployment of data centers in Tier III and Tier IV certification in the design phase/construction phase of the region. At the same time, most private and public entities (BFSI, education, government) have received Uptime Institute's Tier III/IV certification, either during the design phase or for the constructed facility.

## SEGMENTS ANALYSIS

The report includes the investment in the following areas:

### Infrastructure

-□Electrical Infrastructure

-□Mechanical Infrastructure

-□General Construction

### Electrical Infrastructure

-□UPS Systems

-□Generators

-□Transfer Switches & Switchgear

-□PDUs

-□Other Electrical Infrastructure

### Mechanical Infrastructure

-□Cooling Systems

-□Racks

-□Other Mechanical Infrastructure

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## Cooling Systems

- CRAC and CRAH Units
- Chillers Units
- Cooling Towers, Condensers, and Dry Coolers
- Other Cooling Units

## Cooling Techniques

- Air-based Cooling
- Liquid-based Cooling

## General Construction

- Core & Shell Development
- Installation & Commissioning Services
- Engineering & Building Design
- Fire Detection & Suppression
- Physical Security
- DCIM/BMS Solutions

## Tier Standard

- Tier I & Tier II
- Tier III
- Tier IV

## GEOGRAPHICAL ANALYSIS

-□In the Africa data center construction market, countries like South Africa, Kenya, and Nigeria are the developed data center markets in the region. Facilities in the region are developed with government support, which includes incentives for the operation of the data centers.

-□Smart Cities, Special Economic Zones, Free Trade Zones, and governmental incentives and exemptions drive Africa data center construction market growth. South Africa, Kenya, Morocco, Nigeria, Egypt, Ethiopia, and Ghana are some of the major countries in the region which triggered the smart city investments. For instance, the Lanseria Smart City project, and Nkuna City project in South Africa, and the Eko Atlantic City in Nigeria.

## Geography

- Africa
  - o□South Africa
  - o□Kenya
  - o□Nigeria
  - o□Egypt
  - o□Ethiopia
  - o□Other African Countries

## KEY MARKET PARTICIPANTS' INITIATIVES

-□The African data center construction market is witnessing increased demand across industries, and acquisitions & joint ventures enable new players to enter the market, attract customers, and capture a higher market share.

I.□Equinix expanded its footprint in the region by completing the acquisition of MainOne, including MDX-I, in H1 2022.

II.□Digital Realty acquired a major stake of around 55% in Teraco.

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## Major Vendors

### Prominent Support Infrastructure Providers

- [4energy
- [ABB
- [Caterpillar
- [Cummins
- [Delta Electronics
- [EATON
- [EVAPCO
- [Enlogic
- [Legrand
- [Master Power Technologies
- [Rittal
- [Rolls-Royce
- [Schneider Electric
- [Siemens
- [STULZ
- [Vertiv

### Prominent Data Center Construction Contractors

- [Abbeydale
- [Advanced Vision Morocco
- [ARSMAGNA
- [Arup
- [Atkins
- [b2 Architects
- [CAP DC
- [Chess Enterprises
- [Copy Cat Group
- [Eastra Solutions
- [Edarat Group
- [EDS Engineers
- [Egypro
- [H&MV Engineering
- [Ingenium
- [Interkel
- [LB Architects
- [MWK Engineering
- [Orascom Construction
- [Royal HaskoningDHV
- [Shaker Group
- [Sterling & Wilson
- [Summit Technology Solutions
- [Tri-Star Construction

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- []United Egypt
- []Westwood Management

#### Data Center Investors

- []21st Century Technology
- []Africa Data Centres
- []Digital Parks Africa
- []Galaxy Backbone
- []icolo.io (Digital Realty)
- []IXAfrica
- []MainOne
- []Medallion Communications
- []NTT Global Data Centers
- []Paratus Namibia
- []Rack Centre
- []Raxio Data Centres
- []Telecom Egypt
- []Teraco (Digital Realty)
- []Wingu

#### New Entrants

- []Open Access Data Centres (OADC)
- []Nxtra by Airtel
- []Clouddoon
- []Kasi Cloud
- []Google
- []Vantage Data Center

#### KEY QUESTIONS ANSWERED:

- 1.[]How big is the African data center construction market?
- 2.[]What is the growth rate of the African data center construction market?
- 3.[]What are the significant trends in the African data center construction market?
- 4.[]What is the estimated market size in terms of area in the African data center construction market by 2028?
- 5.[]Who are the new entrants in the African data center construction market?
- 6.[]How much MW of power capacity is expected to reach the African data center construction market by 2028?

#### Table of Contents:

- 1 RESEARCH METHODOLOGY
- 2 RESEARCH OBJECTIVES
- 3 RESEARCH PROCESS
- 4 SCOPE & COVERAGE
- 4.1 MARKET DEFINITION
- 4.2 BASE YEAR

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#### 4.3 SCOPE OF THE STUDY

#### 4.4 MARKET SEGMENTS

##### 4.4.1 MARKET SEGMENTATION BY INFRASTRUCTURE

##### 4.4.2 MARKET SEGMENTATION BY ELECTRICAL INFRASTRUCTURE

##### 4.4.3 MARKET SEGMENTATION BY MECHANICAL INFRASTRUCTURE

##### 4.4.4 MARKET SEGMENTATION BY COOLING SYSTEMS

##### 4.4.5 MARKET SEGMENTATION BY COOLING TECHNIQUES

##### 4.4.6 MARKET SEGMENTATION BY GENERAL CONSTRUCTION

##### 4.4.7 MARKET SEGMENTATION BY TIER STANDARDS

##### 4.4.8 MARKET SEGMENTATION BY GEOGRAPHY

#### 5 REPORT ASSUMPTIONS & CAVEATS

##### 5.1 KEY CAVEATS

##### 5.2 CURRENCY CONVERSION

##### 5.3 MARKET DERIVATION

#### 6 PREMIUM INSIGHTS

##### 6.1 KEY HIGHLIGHTS

##### 6.2 SEGMENTAL ANALYSIS

##### 6.3 MARKET TRENDS

##### 6.4 GEOGRAPHICAL ANALYSIS

##### 6.5 KEY MARKET PARTICIPANTS' INITIATIVES

#### 7 MARKET AT A GLANCE

#### 8 INTRODUCTION

##### 8.1 DATA CENTER SITE SELECTION CRITERIA

###### 8.1.1 KEY

#### 9 MARKET OPPORTUNITIES & TRENDS

##### 9.1 INCREASE IN SMART CITY INITIATIVES

##### 9.2 GOVERNMENT SUPPORT FOR DATA CENTER DEVELOPMENT

##### 9.3 GROWING ADOPTION OF ARTIFICIAL INTELLIGENCE

##### 9.4 MIGRATION FROM ON-PREMISES TO COLOCATION & MANAGED SERVICES

##### 9.5 RISE IN 5G NETWORK CONNECTIVITY AND EDGE DATA CENTER DEPLOYMENTS

#### 10 MARKET GROWTH ENABLERS

##### 10.1 INCREASING ADOPTION OF CLOUD SERVICES

##### 10.2 GROWTH IN PENETRATION OF BIG DATA & IOT

##### 10.3 RISE IN RENEWABLE ENERGY ADOPTION

##### 10.4 INCREASE IN SUBMARINE CABLE & INLAND CONNECTIVITY

#### 11 MARKET RESTRAINTS

##### 11.1 LOW BUDGETS & INVESTMENT CONSTRAINTS IN DATA CENTER DEVELOPMENT

##### 11.2 LOCATION CONSTRAINTS ON DATA CENTERS

##### 11.3 DEARTH OF SKILLED WORKFORCE

##### 11.4 SECURITY THREATS IN DATA CENTERS

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- 12 MARKET LANDSCAPE
  - 12.1 MARKET OVERVIEW
  - 12.2 INVESTMENT: MARKET SIZE & FORECAST
  - 12.3 AREA: MARKET SIZE & FORECAST
  - 12.4 POWER CAPACITY: MARKET SIZE & FORECAST
  - 12.5 FIVE FORCES ANALYSIS
    - 12.5.1 THREAT OF NEW ENTRANTS
    - 12.5.2 BARGAINING POWER OF SUPPLIERS
    - 12.5.3 BARGAINING POWER OF BUYERS
    - 12.5.4 THREAT OF SUBSTITUTES
    - 12.5.5 COMPETITIVE RIVALRY

- 13 INFRASTRUCTURE
  - 13.1 MARKET SNAPSHOT & GROWTH ENGINE
  - 13.2 ELECTRICAL INFRASTRUCTURE
    - 13.2.1 MARKET OVERVIEW
    - 13.2.2 MARKET SIZE & FORECAST
  - 13.3 MECHANICAL INFRASTRUCTURE
    - 13.3.1 MARKET OVERVIEW
    - 13.3.2 MARKET SIZE & FORECAST
  - 13.4 GENERAL CONSTRUCTION
    - 13.4.1 MARKET OVERVIEW
    - 13.4.2 MARKET SIZE & FORECAST

- 14 ELECTRICAL INFRASTRUCTURE
  - 14.1 MARKET SNAPSHOT & GROWTH ENGINE
  - 14.2 UPS SYSTEMS
    - 14.2.1 MARKET OVERVIEW
    - 14.2.2 MARKET SIZE & FORECAST
  - 14.3 GENERATORS
    - 14.3.1 MARKET OVERVIEW
    - 14.3.2 MARKET SIZE & FORECAST
  - 14.4 TRANSFER SWITCHES & SWITCHGEAR
    - 14.4.1 MARKET OVERVIEW
    - 14.4.2 MARKET SIZE & FORECAST
  - 14.5 POWER DISTRIBUTION UNITS
    - 14.5.1 MARKET OVERVIEW
    - 14.5.2 MARKET SIZE & FORECAST
  - 14.6 OTHER ELECTRICAL INFRASTRUCTURE
    - 14.6.1 MARKET OVERVIEW
    - 14.6.2 MARKET SIZE & FORECAST

- 15 MECHANICAL INFRASTRUCTURE
  - 15.1 MARKET SNAPSHOT & GROWTH ENGINE
  - 15.2 COOLING SYSTEMS
    - 15.2.1 MARKET OVERVIEW
    - 15.2.2 MARKET SIZE & FORECAST

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## 15.3 RACKS

### 15.3.1 BUSINESS OVERVIEW

### 15.3.2 MARKET SIZE & FORECAST

## 15.4 OTHER MECHANICAL INFRASTRUCTURE

### 15.4.1 MARKET OVERVIEW

### 15.4.2 MARKET SIZE & FORECAST

## 16 COOLING SYSTEMS

### 16.1 MARKET SNAPSHOT & GROWTH ENGINE

### 16.2 CRAC & CRAH UNITS

#### 16.2.1 BUSINESS OVERVIEW

#### 16.2.2 MARKET SIZE & FORECAST

### 16.3 CHILLER UNITS

#### 16.3.1 MARKET OVERVIEW

#### 16.3.2 MARKET SIZE & FORECAST

### 16.4 COOLING TOWERS, CONDENSERS & DRY COOLERS

#### 16.4.1 MARKET OVERVIEW

#### 16.4.2 MARKET SIZE & FORECAST

### 16.5 OTHER COOLING UNITS

#### 16.5.1 MARKET OVERVIEW

#### 16.5.2 MARKET SIZE & FORECAST

## 17 COOLING TECHNIQUE

### 17.1 MARKET SNAPSHOT & GROWTH ENGINE

### 17.2 AIR-BASED COOLING

#### 17.2.1 MARKET OVERVIEW

#### 17.2.2 MARKET SIZE & FORECAST

### 17.3 LIQUID-BASED COOLING

#### 17.3.1 MARKET OVERVIEW

#### 17.3.2 MARKET SIZE & FORECAST

## 18 GENERAL CONSTRUCTION

### 18.1 MARKET SNAPSHOT & GROWTH ENGINE

### 18.2 CORE & SHELL DEVELOPMENT

#### 18.2.1 MARKET OVERVIEW

#### 18.2.2 MARKET SIZE & FORECAST

### 18.3 INSTALLATION & COMMISSIONING SERVICES

#### 18.3.1 MARKET OVERVIEW

#### 18.3.2 MARKET SIZE & FORECAST

### 18.4 ENGINEERING & BUILDING DESIGN

#### 18.4.1 MARKET OVERVIEW

#### 18.4.2 MARKET SIZE & FORECAST

### 18.5 FIRE DETECTION & SUPPRESSION

#### 18.5.1 MARKET OVERVIEW

#### 18.5.2 MARKET SIZE & FORECAST

### 18.6 PHYSICAL SECURITY

#### 18.6.1 MARKET OVERVIEW

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## 18.6.2 MARKET SIZE & FORECAST

## 18.7 DCIM/BMS SOLUTIONS

### 18.7.1 MARKET OVERVIEW

### 18.7.2 MARKET SIZE & FORECAST

## 19 TIER STANDARDS

### 19.1 MARKET SNAPSHOT & GROWTH ENGINE

### 19.2 TIER STANDARDS OVERVIEW

### 19.3 TIER I & II

#### 19.3.1 MARKET OVERVIEW

#### 19.3.2 MARKET SIZE & FORECAST

### 19.4 TIER III

#### 19.4.1 MARKET OVERVIEW

#### 19.4.2 MARKET SIZE & FORECAST

### 19.5 TIER IV

#### 19.5.1 MARKET OVERVIEW

#### 19.5.2 MARKET SIZE & FORECAST

## 20 GEOGRAPHY

### 20.1 INVESTMENT: MARKET SNAPSHOT & GROWTH ENGINE

### 20.2 AREA: MARKET SNAPSHOT & GROWTH ENGINE

### 20.3 POWER CAPACITY: MARKET SNAPSHOT & GROWTH ENGINE

## 21 SOUTH AFRICA

### 21.1 MARKET SNAPSHOT & GROWTH ENGINE

### 21.2 MARKET OVERVIEW

### 21.3 INVESTMENT: MARKET SIZE & FORECAST

### 21.4 AREA: MARKET SIZE & FORECAST

### 21.5 POWER CAPACITY: MARKET SIZE & FORECAST

### 21.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

## 22 KENYA

### 22.1 MARKET SNAPSHOT & GROWTH ENGINE

### 22.2 MARKET OVERVIEW

### 22.3 INVESTMENT: MARKET SIZE & FORECAST

### 22.4 AREA: MARKET SIZE & FORECAST

### 22.5 POWER CAPACITY: MARKET SIZE & FORECAST

### 22.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

## 23 NIGERIA

### 23.1 MARKET SNAPSHOT & GROWTH ENGINE

### 23.2 MARKET OVERVIEW

### 23.3 INVESTMENT: MARKET SIZE & FORECAST

### 23.4 AREA: MARKET SIZE & FORECAST

### 23.5 POWER CAPACITY: MARKET SIZE & FORECAST

### 23.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

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## 24 EGYPT

### 24.1 MARKET SNAPSHOT & GROWTH ENGINE

### 24.2 MARKET OVERVIEW

### 24.3 INVESTMENT: MARKET SIZE & FORECAST

### 24.4 AREA: MARKET SIZE & FORECAST

### 24.5 POWER CAPACITY: MARKET SIZE & FORECAST

### 24.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

## 25 ETHIOPIA

### 25.1 MARKET SNAPSHOT & GROWTH ENGINE

### 25.2 MARKET OVERVIEW

### 25.3 INVESTMENT: MARKET SIZE & FORECAST

### 25.4 AREA: MARKET SIZE & FORECAST

### 25.5 POWER CAPACITY: MARKET SIZE & FORECAST

### 25.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

## 26 OTHER AFRICAN COUNTRIES

### 26.1 MARKET SNAPSHOT & GROWTH ENGINE

### 26.2 MARKET OVERVIEW

### 26.3 INVESTMENT: MARKET SIZE & FORECAST

### 26.4 AREA: MARKET SIZE & FORECAST

### 26.5 POWER CAPACITY: MARKET SIZE & FORECAST

### 26.6 SUPPORT INFRASTRUCTURE: MARKET SIZE & FORECAST

## 27 COMPETITIVE LANDSCAPE

### 27.1 SUPPORT INFRASTRUCTURE

### 27.2 CONSTRUCTION CONTRACTORS

### 27.3 DATA CENTER INVESTORS

## 28 PROMINENT SUPPORT INFRASTRUCTURE PROVIDERS

### 28.1 4ENERGY

#### 28.1.1 BUSINESS OVERVIEW

#### 28.1.2 PRODUCT OFFERINGS

### 28.2 ABB

#### 28.2.1 BUSINESS OVERVIEW

#### 28.2.2 PRODUCT OFFERINGS

### 28.3 CATERPILLAR

#### 28.3.1 BUSINESS OVERVIEW

#### 28.3.2 PRODUCT OFFERINGS

### 28.4 CUMMINS

#### 28.4.1 BUSINESS OVERVIEW

#### 28.4.2 PRODUCT OFFERINGS

### 28.5 DELTA ELECTRONICS

#### 28.5.1 BUSINESS OVERVIEW

#### 28.5.2 PRODUCT OFFERINGS

### 28.6 EATON

#### 28.6.1 BUSINESS OVERVIEW

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- 28.6.2 PRODUCT OFFERINGS
- 28.7 EVAPCO
  - 28.7.1 BUSINESS OVERVIEW
  - 28.7.2 PRODUCT OFFERINGS
- 28.8 ENLOGIC
  - 28.8.1 BUSINESS OVERVIEW
  - 28.8.2 PRODUCT OFFERINGS
- 28.9 LEGRAND
  - 28.9.1 BUSINESS OVERVIEW
  - 28.9.2 PRODUCT OFFERINGS
- 28.10 MASTER POWER TECHNOLOGIES
  - 28.10.1 BUSINESS OVERVIEW
  - 28.10.2 PRODUCT OFFERINGS
- 28.11 RITTAL
  - 28.11.1 BUSINESS OVERVIEW
  - 28.11.2 PRODUCT OFFERINGS
- 28.12 ROLLS-ROYCE
  - 28.12.1 BUSINESS OVERVIEW
  - 28.12.2 PRODUCT OFFERINGS
- 28.13 SCHNEIDER ELECTRIC
  - 28.13.1 BUSINESS OVERVIEW
  - 28.13.2 PRODUCT OFFERINGS
- 28.14 SIEMENS
  - 28.14.1 BUSINESS OVERVIEW
  - 28.14.2 PRODUCT OFFERINGS
- 28.15 STULZ
  - 28.15.1 BUSINESS OVERVIEW
  - 28.15.2 PRODUCT OFFERINGS
- 28.16 VERTIV
  - 28.16.1 BUSINESS OVERVIEW
  - 28.16.2 SERVICE OFFERINGS
- 29 PROMINENT DATA CENTER CONSTRUCTION CONTRACTORS
  - 29.1 ABBEYDALE
    - 29.1.1 BUSINESS OVERVIEW
    - 29.1.2 SERVICE OFFERINGS
  - 29.2 ADVANCED VISION MOROCCO
    - 29.2.1 BUSINESS OVERVIEW
    - 29.2.2 SERVICE OFFERINGS
  - 29.3 ARSMAGNA
    - 29.3.1 BUSINESS OVERVIEW
    - 29.3.2 SERVICE OFFERINGS
  - 29.4 ARUP
    - 29.4.1 BUSINESS OVERVIEW
    - 29.4.2 SERVICE OFFERINGS
  - 29.5 ATKINS
    - 29.5.1 BUSINESS OVERVIEW

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29.5.2 SERVICE OFFERINGS  
29.6 B2 ARCHITECTS  
29.6.1 BUSINESS OVERVIEW  
29.6.2 SERVICE OFFERINGS  
29.7 CAP DC  
29.7.1 BUSINESS OVERVIEW  
29.7.2 SERVICE OFFERINGS  
29.8 CHESS ENTERPRISES  
29.8.1 BUSINESS OVERVIEW  
29.8.2 SERVICE OFFERINGS  
29.9 COPY CAT GROUP  
29.9.1 BUSINESS OVERVIEW  
29.9.2 SERVICE OFFERINGS  
29.10 EASTRA SOLUTIONS  
29.10.1 BUSINESS OVERVIEW  
29.10.2 SERVICE OFFERINGS  
29.11 EDARAT GROUP  
29.11.1 BUSINESS OVERVIEW  
29.11.2 SERVICE OFFERINGS  
29.12 EDS ENGINEERS  
29.12.1 BUSINESS OVERVIEW  
29.12.2 SERVICE OFFERINGS  
29.13 EGYPRO  
29.13.1 BUSINESS OVERVIEW  
29.13.2 SERVICE OFFERINGS  
29.14 H&MV ENGINEERING  
29.14.1 BUSINESS OVERVIEW  
29.14.2 SERVICE OFFERINGS  
29.15 INGENIUM  
29.15.1 BUSINESS OVERVIEW  
29.15.2 SERVICE OFFERINGS  
29.16 INTERKEL  
29.16.1 BUSINESS OVERVIEW  
29.16.2 SERVICE OFFERINGS  
29.17 JLB ARCHITECTS  
29.17.1 BUSINESS OVERVIEW  
29.17.2 SERVICE OFFERINGS  
29.18 MWK ENGINEERING  
29.18.1 BUSINESS OVERVIEW  
29.18.2 SERVICE OFFERINGS  
29.19 ORASCOM CONSTRUCTION  
29.19.1 BUSINESS OVERVIEW  
29.19.2 SERVICE OFFERINGS  
29.20 ROYAL HASKONINGDHV  
29.20.1 BUSINESS OVERVIEW  
29.20.2 SERVICE OFFERINGS  
29.21 SHAKER GROUP

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- 29.21.1 BUSINESS OVERVIEW
- 29.21.2 SERVICE OFFERINGS
- 29.22 STERLING AND WILSON
- 29.22.1 BUSINESS OVERVIEW
- 29.22.2 SERVICE OFFERINGS
- 29.23 SUMMIT TECHNOLOGY SOLUTIONS
- 29.23.1 BUSINESS OVERVIEW
- 29.23.2 SERVICE OFFERINGS
- 29.24 TRI-STAR CONSTRUCTION
- 29.24.1 BUSINESS OVERVIEW
- 29.24.2 SERVICE OFFERINGS
- 29.25 UNITED EGYPT
- 29.25.1 BUSINESS OVERVIEW
- 29.25.2 SERVICE OFFERINGS
- 29.26 WESTWOOD MANAGEMENT
- 29.26.1 BUSINESS OVERVIEW
- 29.26.2 SERVICE OFFERINGS

- 30 DATA CENTER INVESTORS
- 30.1 21ST CENTURY TECHNOLOGIES
- 30.1.1 BUSINESS OVERVIEW
- 30.1.2 SERVICE OFFERINGS
- 30.2 AFRICA DATA CENTRES
- 30.2.1 BUSINESS OVERVIEW
- 30.2.2 SERVICE OFFERINGS
- 30.3 DIGITAL PARKS AFRICA
- 30.3.1 BUSINESS OVERVIEW
- 30.3.2 SERVICE OFFERINGS
- 30.4 DIGITAL REALTY
- 30.4.1 BUSINESS OVERVIEW
- 30.4.2 SERVICE OFFERINGS
- 30.4.3 KEY NEWS
- 30.5 EQUINIX
- 30.5.1 BUSINESS OVERVIEW
- 30.5.2 SERVICE OFFERINGS
- 30.5.3 KEY NEWS
- 30.6 GALAXY BACKBONE
- 30.6.1 BUSINESS OVERVIEW
- 30.6.2 SERVICE OFFERINGS
- 30.6.3 KEY NEWS
- 30.7 IXAFRICA
- 30.7.1 BUSINESS OVERVIEW
- 30.7.2 SERVICE OFFERINGS
- 30.8 MEDALLION COMMUNICATIONS
- 30.8.1 BUSINESS OVERVIEW
- 30.8.2 SERVICE OFFERINGS
- 30.9 NTT GLOBAL DATA CENTERS

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- 30.9.1 BUSINESS OVERVIEW
- 30.9.2 SERVICE OFFERINGS
- 30.9.3 KEY NEWS
- 30.10 PARATUS NAMIBIA
- 30.10.1 BUSINESS OVERVIEW
- 30.10.2 SERVICE OFFERINGS
- 30.11 RACK CENTRE
- 30.11.1 BUSINESS OVERVIEW
- 30.11.2 SERVICE OFFERINGS
- 30.12 RAXIO DATA CENTRES
- 30.12.1 BUSINESS OVERVIEW
- 30.12.2 SERVICE OFFERINGS
- 30.12.3 KEY NEWS
- 30.13 TELECOM EGYPT
- 30.13.1 BUSINESS OVERVIEW
- 30.13.2 SERVICE OFFERINGS
- 30.14 WINGU
- 30.14.1 BUSINESS OVERVIEW
- 30.14.2 SERVICE OFFERINGS

- 31 NEW ENTRANTS
- 31.1 OPEN ACCESS DATA CENTRES
- 31.1.1 BUSINESS OVERVIEW
- 31.1.2 SERVICE OFFERINGS
- 31.2 AIRTEL NIGERIA
- 31.2.1 BUSINESS OVERVIEW
- 31.2.2 SERVICE OFFERINGS
- 31.3 CLOUDOON
- 31.3.1 BUSINESS OVERVIEW
- 31.3.2 SERVICE OFFERINGS
- 31.4 KASI CLOUD
- 31.4.1 BUSINESS OVERVIEW
- 31.4.2 SERVICE OFFERINGS
- 31.5 GOOGLE
- 31.5.1 BUSINESS OVERVIEW
- 31.5.2 SERVICE OFFERINGS
- 31.6 VANTAGE DATA CENTERS
- 31.6.1 BUSINESS OVERVIEW
- 31.6.2 SERVICE OFFERINGS

- 32 REPORT SUMMARY
- 32.1 KEY TAKEAWAYS

- 33 QUANTITATIVE SUMMARY
- 33.1 AFRICA DATA CENTER CONSTRUCTION MARKET
- 33.1.1 INVESTMENT: MARKET SIZE & FORECAST
- 33.1.2 INFRASTRUCTURE: MARKET SIZE & FORECAST

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- 33.2 MARKET SEGMENTATION
  - 33.2.1 ELECTRICAL INFRASTRUCTURE: MARKET SIZE & FORECAST
  - 33.2.2 MECHANICAL INFRASTRUCTURE: MARKET SIZE & FORECAST
  - 33.2.3 COOLING SYSTEMS: MARKET SIZE & FORECAST
  - 33.2.4 COOLING TECHNIQUES: MARKET SIZE & FORECAST
  - 33.2.5 GENERAL CONSTRUCTION: MARKET SIZE & FORECAST
  - 33.2.6 TIER STANDARDS: MARKET SIZE & FORECAST
- 33.3 MARKET BY GEOGRAPHY
  - 33.3.1 INVESTMENT: MARKET SIZE & FORECAST
  - 33.3.2 AREA: MARKET SIZE & FORECAST
  - 33.3.3 POWER CAPACITY: MARKET SIZE & FORECAST
- 33.4 SOUTH AFRICA
  - 33.4.1 INVESTMENT: MARKET SIZE & FORECAST
  - 33.4.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 33.5 KENYA
  - 33.5.1 INVESTMENT: MARKET SIZE & FORECAST
  - 33.5.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 33.6 NIGERIA
  - 33.6.1 INVESTMENT: MARKET SIZE & FORECAST
  - 33.6.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 33.7 EGYPT
  - 33.7.1 INVESTMENT: MARKET SIZE & FORECAST
  - 33.7.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 33.8 ETHIOPIA
  - 33.8.1 INVESTMENT: MARKET SIZE & FORECAST
  - 33.8.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 33.9 OTHER AFRICAN COUNTRIES
  - 33.9.1 INVESTMENT: MARKET SIZE & FORECAST
  - 33.9.2 INFRASTRUCTURE: MARKET SIZE & FORECAST
- 34 APPENDIX
  - 34.1 ABBREVIATIONS

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