

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

Market Report | 2023-05-17 | 472 pages | Arizton Advisory & Intelligence

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### **Report description:**

The Middle East and Africa data center construction market is expected to grow at a CAGR of 8.54% from 2022-2028.

### **KEY HIGHLIGHTS**

- The region's major global cloud service providers include Amazon Web Services, Tencent Cloud, Microsoft, Google Cloud, Alibaba Cloud, Oracle, and Huawei Technologies. For instance, Microsoft announced its intention to open a cloud region in Saudi Arabia.
- The Middle East and 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), Raman, Saudi Vision, Blue, Equiano, Medusa Submarine Cable System, and SeaMeWe - 6, which are expected to be ready for services during the forecast period.
- The introduction of the 5G network in the Middle East & Africa is likely to generate a substantial amount of data, which will further lead to increasing investments in data centers. High internet connectivity, bandwidth, and less processing time is the feature of 5G technology. The countries like the UAE, Saudi Arabia, South Africa, Oman, Kuwait, Bahrain, Kenya, Nigeria, and Qatar commercially deployed 5G network services. Turkey, Israel, Ethiopia, Algeria, Ghana, Jordan, Lebanon, and Iran are other countries in 5G planning and are yet to deploy commercial services during the forecast period.

### **SEGMENTATION INSIGHTS**

- Most facilities are being developed to operate at a PUE of less than 1.5. In contrast, few facilities in countries like Turkey that adopt partial free cooling during peak winters aim to operate at a PUE of less than 1.3.
- 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 Middle East and Africa data center construction market is investing in cooling infrastructure due to the high-temperature climate in some countries. In 2022, cooling systems service providers invested a share of more than 65% of the total mechanical

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infrastructure.

## 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

### 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

## MARKET TRENDS

### Rise in the Procurement of Renewable Energy Sources

-□The Middle East and Africa have an abundance of availability of solar energy, where most of the countries in the region are undertaking renewable energy strategies & visions to develop renewable energy projects and meet the region's carbon-neutral goals set by respective governments.

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- I. In the UAE, the Energy Strategy 2050 aims to increase the share of renewable energy from 25% to 50% in the total energy mix by 2050.
- II. Saudi Arabia has launched The National Renewable Energy Program (NREP) under Vision 2030, where 13 projects will generate over 4.8 GW of renewable energy. In addition, Bahrain plans to generate around 280 MW of electricity from renewable sources by 2025, increasing to around 700 MW by 2030 to attain national renewable energy targets.
- III. 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.
- In December 2022, Saudi Arabia announced the development of 10 renewable energy projects with a power capacity of 7 GW, which is part of the Kingdom's 2030 Vision.
- 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.

#### Increasing Cloud Investments

- The increase in digitalization and the shift of workloads to cloud platforms from on-premises facilities to make their operations more efficient and scalable witnessed the increase in investments by cloud service providers in the Middle East and Africa over the last few years.
- I. Amazon Web Services aims to develop the infrastructure region in Tel Aviv, Israel, which will likely be operational in 2023.
- II. 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.
- III. In 2022, Google Cloud launched its first local cloud region in Israel. Further, Amazon outpost cloud services were deployed for the first time in Oman in the Oman Data Park, and Microsoft Azure established its first global data center region in Qatar.

#### GEOGRAPHICAL ANALYSIS

- UAE dominates the regional market in terms of data center developments. In addition, Saudi Arabia, South Africa, Israel, Kenya, and Oman are among the major contributors to high data center development activities in the Middle East and Africa data center construction market. Qatar, Nigeria, Bahrain, Egypt, Ethiopia, and Kuwait are emerging markets that witness significant growth due to digitalization and growth in connectivity.
- In the Middle East & Africa, the presence of smart cities in the region also drives data center investments. The UAE, Saudi Arabia, South Africa, Kenya, Kuwait, Morocco, Nigeria, Egypt, Ethiopia, and Ghana are some of the major countries in the region which triggered the smart city investments. For instance, the NEOM project in Saudi Arabia is under development as a part of Crown Prince Mohammed bin Salman's Vision 2030, which will also comprise the data center development under a joint venture firm ZeroPoint DC.

#### Geography

- Middle East
  - o UAE
  - o Saudi Arabia
  - o Bahrain
  - o Oman
  - o Kuwait
  - o Qatar
  - o Israel
  - o Jordan

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o Other Middle Eastern Countries

- Africa

o South Africa

o Kenya

o Nigeria

o Egypt

o Ethiopia

o Other African Countries

#### KEY MARKET PARTICIPANTS' INITIATIVES

The surge in data center activities across the region will be a major source of revenue for construction contractors. Some prominent local and global construction contractors in the Middle East and Africa data center construction market include AECOM, Laing O'Rourke, Dar Group, Mercury Engineering, Deerns, Anel Group, Linesight, M+W, McLaren Construction, Atkins, B2 Architects, ENMAR Engineering, Arup, DC Pro Engineering, Edarat, Sterling & Wilson, United Egypt, Westwood Management, HHM Building Contracting, Red Engineering, and Turner & Townsend. For instance, Laing O'Rourke is selected by Khazna Data Centres to design and build a facility and office space in Dubai Design District.

#### Major Vendors

##### Prominent Support Infrastructure Providers

- 4energy

- ABB

- Airedale

- Alfa Laval

- Canovate

- Caterpillar

- Cummins

- Delta Electronics

- EAE Group

- EATON

- Envicool

- EVAPCO

- Enlogic

- HITEC Power Protection

- Johnson Controls

- Legrand

- Master Power Technologies

- Rittal

- Rolls-Royce

- Schneider Electric

- Siemens

- STULZ

- Vertiv

##### Prominent Data Center Construction Contractors

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- [ ] INT'LTEC
- [ ] ISG
- [ ] LB Architects
- [ ] Laing O'Rourke
- [ ] Linesight
- [ ] M+W Group (Exyte)
- [ ] Mace
- [ ] Mercury Engineering
- [ ] McLaren Construction Group
- [ ] MIS
- [ ] MWK Engineering
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- [ ] Orascom Construction
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- [ ] Qatar Site & Power
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- []Sudlows
- []Telal Engineering & Contracting
- []Tri-Star Construction
- []Turner & Townsend
- []United Egypt
- []Westwood Management

#### Prominent Data Center Investors

- []21st Century Technology
- []Africa Data Centres
- []Adgar Investments and Development
- []Amazon Web Services (AWS)
- []Batelco
- []Bynet Data Communications
- []Digital Parks Africa
- []Equinix
- []Etisalat
- []EdgeConneX
- []Future Digital Data Systems
- []G42
- []Gulf Data Hub
- []Google
- []Galaxy Backbone
- []icolo.io (Digital Realty)
- []IXAfrica
- []Khazna Data Centers
- []Moro Hub
- []MedOne
- []MEEZA
- []Mobily
- []MainOne
- []Medallion Communications
- []Microsoft
- []NTT Global Data Centers
- []Oman Data Park
- []Ooredoo
- []Paratus Namibia
- []Rack Centre
- []Raxio Data Centres
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- []Tencent Cloud
- []Wingu

#### New Entrants

- []Airtel Nigeria
- []Clouddoon
- []Compass Datacenters
- []Digital Realty
- []EDGNEX
- []Global Technical Realty
- []Infinity
- []Kasi Cloud
- []Open Access Data Centres (OADC)
- []Vantage Data Centers
- []Quantum Switch
- []ZeroPoint DC

#### KEY QUESTIONS ANSWERED:

- 1.[]How big is the Middle East and Africa data center construction market?
- 2.[]What is the growth rate of the Middle East and Africa data center construction market?
- 3.[]What is the estimated market size in terms of area in the Middle East and Africa data center construction market by 2028?
- 4.[]Who are the new entrants in the Middle East and Africa data center construction market?
- 5.[]How many MW of power capacity is expected to reach the Middle East and Africa data center construction market by 2028?

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#### 43.2.1 ELECTRICAL INFRASTRUCTURE: MARKET SIZE & FORECAST

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#### 43.4.2 INFRASTRUCTURE: MARKET SIZE & FORECAST

### 43.5 SAUDI ARABIA

#### 43.5.1 INVESTMENT: MARKET SIZE & FORECAST

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### 43.6 BAHRAIN

#### 43.6.1 INVESTMENT: MARKET SIZE & FORECAST

#### 43.6.2 INFRASTRUCTURE: MARKET SIZE & FORECAST

### 43.7 OMAN

#### 43.7.1 INVESTMENT: MARKET SIZE & FORECAST

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#### 43.8.1 INVESTMENT: MARKET SIZE & FORECAST

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### 43.9 QATAR

#### 43.9.1 INVESTMENT: MARKET SIZE & FORECAST

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### 43.10 ISRAEL

#### 43.10.1 INVESTMENT: MARKET SIZE & FORECAST

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#### 43.11.1 INVESTMENT: MARKET SIZE & FORECAST

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#### 44 APPENDIX

##### 44.1 ABBREVIATIONS

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