

## **Indonesia Data Center Market - Investment Analysis & Growth Opportunities 2024-2029**

Market Report | 2024-04-23 | 137 pages | Arizton Advisory & Intelligence

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### **Report description:**

The Indonesia data center market is expected to grow at a CAGR of 5.91% from 2023-2029.

### **KEY HIGHLIGHTS**

- The Indonesia data center market is witnessing significant growth in Southeast Asia, driven by digitalization growth, rising connectivity, spill-up of demand from other major markets such as Singapore, and other factors contributing to market growth.
- Indonesia has positioned itself as a rapidly expanding data center location in Southeast Asia, experiencing significant growth in investments for data centers from local and global operators. For instance, in December 2023, Digital Edge announced that it had acquired the remaining shares of Indonesian digital infrastructure company - Indonet, with the initial acquisition beginning in 2021.
- The rising opportunities in the market have attracted several new entrants to the Indonesia data center market, such as Equinix, Digital Edge, Gaw Capital, BDx, and others.
- Despite a growing Southeast Asian market, Indonesia is growing on the regional cloud computing landscape. This status encourages substantial investments from cloud service providers within the country. For instance, in May 2023, under a collaboration agreement with Amazon Web Services (AWS) and Elitery, a managed IT services provider in Indonesia, the United States Agency for International Development (USAID) facilitated Indonesia's cloud-based digital transformation through the TALENTA initiative. This program focuses on workforce training and provides digital technology support for startups and small- to medium-sized enterprises.
- Indonesia has a favorable climate for developing renewable energy sources. By 2060, it aims to be a net-zero carbon emissions country with increasing renewable energy production. For instance, in November 2023, under the Just Energy Transition Partnership (JETP), Indonesia aimed to limit CO2 emissions to 250 million metric tons in its on-grid power sector by 2030.
- Data center operators in the country are focusing on adopting renewable energy sources. For instance, a prominent data center operator, Telkom Indonesia, has announced the adoption of renewable energy for its data center in Batam.

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-[]The digitalization trend significantly propels the growth of the Indonesia data center market, with the Indonesian government actively undertaking initiatives to drive digital transformation. For instance, in December 2023, the Indonesian government announced its plans to introduce a Digital Rupee to boost economic growth. The Digital Rupee, set to be launched under the project code- Project Garuda - will be issued and managed by the country's central bank, Bank Indonesia.

#### WHY SHOULD YOU BUY THIS RESEARCH?

- []Market size is available in terms of investment, area, power capacity, and Indonesia's colocation market revenue.
- []An assessment of the data center investment in Indonesia by colocation, hyperscale, and enterprise operators.
- []Investments in the area (square feet) and power capacity (MW) across cities in the country.
- []A detailed study of the existing Indonesia data center market landscape, an in-depth market analysis, and insightful predictions about market size during the forecast period.
- []Snapshot of existing and upcoming third-party data center facilities in Indonesia
- []Facilities Covered (Existing): 73
- []Facilities Identified (Upcoming): 16
- []Coverage: 18+ Cities
- []Existing vs. Upcoming (Area)
- []Existing vs. Upcoming (IT Load Capacity)
- []Data Center Colocation Market in the Indonesia
- []Colocation Market Revenue & Forecast (2023-2029)
- []Wholesale vs. Retail Colocation Revenue (2023-2029)
- []Retail Colocation Pricing
- []Wholesale Colocation Pricing
- []The Indonesian data center market investments are classified into 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 aspects of the industry.

#### VENDOR LANDSCAPE

- []The market has several global support infrastructure providers, which will increase its competitiveness and lead to lower infrastructure prices in the coming years. Some of the support infrastructure vendors in the Indonesia data center market include ABB, Caterpillar, Cummins, Delta Electronics, Eaton, Mitsubishi Electric, and others.
- []The Indonesia data center market is dominated by several local and global construction contractors, such as Aesler Group International, Arkonin, AWP Architects, Barry-Wehmiller Design Group, Turner & Townsend, DSCO Group, and others. For instance, in March 2024, BW Digital and Citramas announced plans to construct a new data center and subsea cable infrastructure in Indonesia.

#### IT Infrastructure Providers

- []Cisco Systems
- []Dell Technologies
- []Fujitsu
- []Hewlett Packard Enterprise

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- [Hitachi Vantara
- [Huawei Technologies
- [IBM
- [Inspur
- [Juniper Networks
- [Lenovo

#### Data Center Construction Contractors & Sub-Contractors

- [Aesler Group International
- [AO
- [Arkonin
- [Asdi Swasatya
- [Aurecon
- [AWP Architects
- [Beca
- [Cundall
- [Barry-Wehmiller Design Group
- [DSCO Group
- [Leighton Asia
- [NTT Facilities
- [Obayashi Corporation
- [Parker van den Bergh
- [PT PP
- [Ramboll
- [Sarana Multi Infrastructure
- [Tetra
- [Turner & Townsend
- [Vale Architects
- [WT

#### Support Infrastructure Providers

- [ABB
- [Caterpillar
- [Cummins
- [Cyber Power Systems
- [Delta Electronics
- [Eaton
- [Fuji Electric
- [HITEC Power Protection
- [Legrand
- [Mitsubishi Electric
- [Piller Power Systems
- [Rittal
- [Rolls-Royce
- [Schneider Electric

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- STULZ
- Vertiv

#### Data Center Investors

- Biznet Data Center
- Datacomm
- DCI Indonesia
- DTP
- Elitery
- EDGE DC
- IndoKeppel Data Centres
- IDC Indonesia
- MettaDC
- NTT DATA
- Princeton Digital Group
- Pure Data Centres Group
- SpaceDC
- ST Telemedia Global Data Centres
- Telkom Indonesia

#### New Entrants

- Big Data Exchange (BDx)
- Gaw Capital
- Digital Edge DC
- EdgeConneX
- Equinix
- Evolution Data Centres
- K2 Data Centres
- Minoro Energi Indonesia

#### EXISTING VS. UPCOMING DATA CENTERS

- Existing Facilities in the Region (Area and Power Capacity)
  - Jakarta
  - West Java
  - Other Cities
- List of Upcoming Facilities in the Region (Area and Power Capacity)
  - Jakarta
  - West Java
  - Other Cities

#### REPORT COVERAGE:

This report analyses the Indonesia data center market share. It elaboratively analyses the existing and upcoming facilities and

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

#### KEY QUESTIONS ANSWERED:

1. How big is the Indonesia data center market?
2. How many MW of power capacity will be added across Indonesia from 2024 to 2029?
3. How many existing and upcoming data center facilities exist in Indonesia?
4. What is the growth rate of the Indonesia data center market?
5. What factors are driving the Indonesia data center market?
6. Who are the key investors in the Indonesia data center market?

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