

Indonesia Data Center Market - Investment Analysis & Growth Opportunities 2026-2031

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Report description:

The Indonesia data center market is expected to grow at a CAGR of 13.71% from 2025 to 2031.

INDONESIA DATA CENTER MARKET - KEY HIGHLIGHTS

- Indonesia is emerging as a key player in the Southeast Asia data center market, showcasing substantial growth potential. The government's proactive digital transformation initiatives, alongside the increasing implementation of artificial intelligence technologies and growing submarine connectivity, are driving significant investments in the country's data center infrastructure.
- Jakarta is the top data center destination in the country. It continues to be Indonesia's leading hub for data center expansion, marked by a concentrated growth in advanced facilities, hyperscale data centers, and dedicated cloud regions. There are 38 existing and 13 upcoming data centers in the city, as of September 2025.
- As of 2025, the construction cost of data centers in Indonesia ranged from \$8 million to \$9 million per MW, making it a more affordable option as compared to other regional hubs such as Singapore and Malaysia. However, these costs are expected to increase annually due to several factors, including supply chain issues, high inflation, and rising interest rates.
- In September 2025, the Investment Authority (INA) announced its decision to partner with foreign firms to invest in Indonesia-linked data centers, renewables and artificial intelligence ventures. It is also jointly developing a data center campus in Batam with DayOne.

SEGMENTS

- IT Infrastructure
 - o Server Infrastructure
 - o Storage Infrastructure
 - o Network Infrastructure

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- 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 and CRAH Units
 - o□Chiller Units
 - o□Cooling Towers, Condensers and Dry Coolers
 - o□Other Cooling Units
- General Construction
 - o□Core & Shell Development
 - o□Installation & commissioning Services
 - o□Building & Engineering 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
- Geography
 - o□Jakarta
 - o□Batam

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 in the country.
- 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): 88
 - o□Facilities Identified (Upcoming): 25
 - o□Coverage: 17 Cities
 - o□Existing vs. Upcoming (Data Center Area)
 - o□Existing vs. Upcoming (IT Load Capacity)
- Data center colocation market in Indonesia
 - o□Colocation Market Revenue & Forecast (2022-2031)
 - o□Retail & Wholesale Colocation Revenue (2022-2031)
 - o□Retail & Wholesale Colocation Pricing

- Indonesia data center landscape market 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.

INDONESIA DATA CENTER MARKET VENDOR LANDSCAPE

- In the current landscape of colocation investors, several established companies play a significant role. Notable players include BDx Data Centers, Bitera Data Center, Biznet Data Center, Datacomm Diangraha, Digital Realty, DCI Indonesia, DTP Telecom, Digital Edge, Digital Hyperspace Indonesia, Elitery, EdgeConneX, Equinix, Google, IDC Indonesia, IndoKeppel Data Centres, K2 Strategic, MettaDC, NTT DATA, Pure Data Centres, Princeton Digital Group, SM+, ST Telemedia Global Data Centres and Telkom Indonesia.
- The market has witnessed several new players emerge over the past few years. The notable entrants include Aslan Energy Capital, BW Digital, DAMAC Digital, DayOne, Gaw Capital, Microsoft, Minoro Energi, Racks Central, Singtel- Nxera and SEAX Global, and several others.
- DAMAC Digital announced its investment of \$2.3 billion in Jakarta Data Center, which will be an AI-ready data center. It is the company's second project and a part of its broader strategy to reach over 300MW capacity across Southeast Asia by 2026.
- In October 2025, Digital Edge secured \$325 million credit facility from local financial firm, PT Bank Central Asia Tbk (BCA), to support its new build expansion in the Jakarta metro, refinance existing BCA facility, and fund completion of the final phase of the 23MW EDGE2 site located in Jl. Kuningan Mulia, South Jakarta.
- Hyperscalers are accelerating investment in Indonesia, positioning the country as a key regional hub for cloud and AI infrastructure in Southeast Asia. Microsoft launched its first data center in May 2025 and is expected to contribute around \$2.5 billion to the economy and create 60,000 jobs by 2028. Additionally, it will also support digital training for one million people, with 840,000 already participating in AI capability-building.
- In July 2025, Oracle announced the launch of its first cloud region, the Indonesia North (Batam) cloud region with one availability zone. The company will lease a data center from DayOne, which is located in Nongsa Digital Park in Batam

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)
 - o □ Jakarta
 - o □ Other Cities

IT Infrastructure Providers

- Cisco
- Dell Technologies
- Fujitsu
- Hewlett Packard Enterprise
- Huawei Technologies
- Hitachi Vantara
- IBM

- Inspur
- Lenovo
- NVIDIA

Data Center Construction Contractors & Sub-Contractors

- Aesler Grup
- AO Construction
- ARKONIN
- Asdi Swasatya
- Aurecon
- AWP Architects
- BECA
- BW Design Group
- Cundall
- DSCO Group
- Jaya Karya Integrasi
- Leighton Asia
- NTT Facilities
- PT Berca Buana Sakti
- PT Jaya Teknik Indonesia
- PT Jaya Obayashi
- PT AtoZ Teknik
- PT Total Bangun Persada Tbk
- Parker, van den Bergh
- PT PP
- PT Indokoei International
- PT SMI
- PT Kajima Indonesia
- PT Sumaraja Indah
- PT Acset Indonusa Tbk
- RED Engineering
- Ramboll
- Turner & Townsend
- Tetra
- VINCI Energies
- Vale Architects
- WT Asia

Support Infrastructure Providers

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

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- Legrand
- Mitsubishi Electric
- Piller Power Systems
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- Schneider Electric
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- Vertiv

Data Center Investors

- BDx Data Centers
- Bitera Data Center
- Biznet Data Center
- Datacomm Diangraha
- Digital Realty Bersama
- DCI Indonesia
- DTP Telecom
- Digital Edge
- Digital Hyperspace Indonesia
- Elitery
- EdgeConneX
- Equinix
- Google
- IDC Indonesia
- IndoKeppel Data Centres
- K2 Strategic
- MettaDC
- NTT DATA
- Pure Data Centres
- Princeton Digital Group
- SM+
- ST Telemedia Global Data Centres
- Telkom Indonesia (NeutraDC)

New Entrants

- Aslan Energy Capital
- BW Digital
- DAMAC Digital
- DayOne
- Gaw Capital
- Microsoft
- Minoro Energi
- Racks Central
- Singtel-Nxera
- SEAX Global

KEY QUESTIONS ANSWERED:

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- 1.□How big is the Indonesia data center market?
- 2.□What factors are driving the Indonesia data center market?
- 3.□How much MW of power capacity will be added in Indonesia in 2031?

Table of Contents:

- 1.□CHAPTER 1: EXISTING & UPCOMING THIRD-PARTY DATA CENTERS IN INDONESIA
 - Data Center Snapshot
 - Data Center Snapshot by Cities
 - Existing & Upcoming Data Center Supply
 - List of Upcoming Data Center Projects in Indonesia□
- 2.□CHAPTER 2: INVESTMENT OPPORTUNITIES IN INDONESIA
 - Microeconomic & Macroeconomic Factors for Indonesia Market
 - Impact of AI on Data Center Industry in Indonesia
 - Investment Opportunities in Indonesia
 - Digital Data in Indonesia
 - Government Rules and Regulation for Data Centers
 - Market Investment by Area
 - Market Investment by Power Capacity□
- 3.□CHAPTER 3: DATA CENTER COLOCATION MARKET IN INDONESIA
 - Colocation Services Market in Indonesia
 - Demand across Industries in Indonesia
 - Retail Vs. Wholesale Data Center Colocation
 - Colocation Pricing (Quarter Rack, Half Rack, & Full Rack) and Addons□
- 4.□CHAPTER 4: MARKET DYNAMICS
 - Market Enablers
 - Market Trends
 - Market Restraints□
- 5.□CHAPTER 5: MARKET SEGMENTATION
 - IT Infrastructure: Market Size & Forecast
 - Electrical Infrastructure: Market Size & Forecast
 - Mechanical Infrastructure: Market Size & Forecast
 - General Construction: Market Size & Forecast□
- 6.□CHAPTER 6: TIER STANDARDS INVESTMENT
 - Tier I & II
 - Tier III
 - Tier IV□
- 7.□CHAPTER 7: GEOGRAPHY SEGMENTATION
 - Jakarta
 - Batam□
- 8.□CHAPTER 8: KEY MARKET PARTICIPANTS
 - IT Infrastructure Providers
 - Construction Contractors and Sub-Contractors
 - Support Infrastructure Providers
 - Data Center Investors
 - New Entrants□
- 9.□CHAPTER 9: APPENDIX

- Market Derivation
- Site Selection Criteria
- Quantitative Summary

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