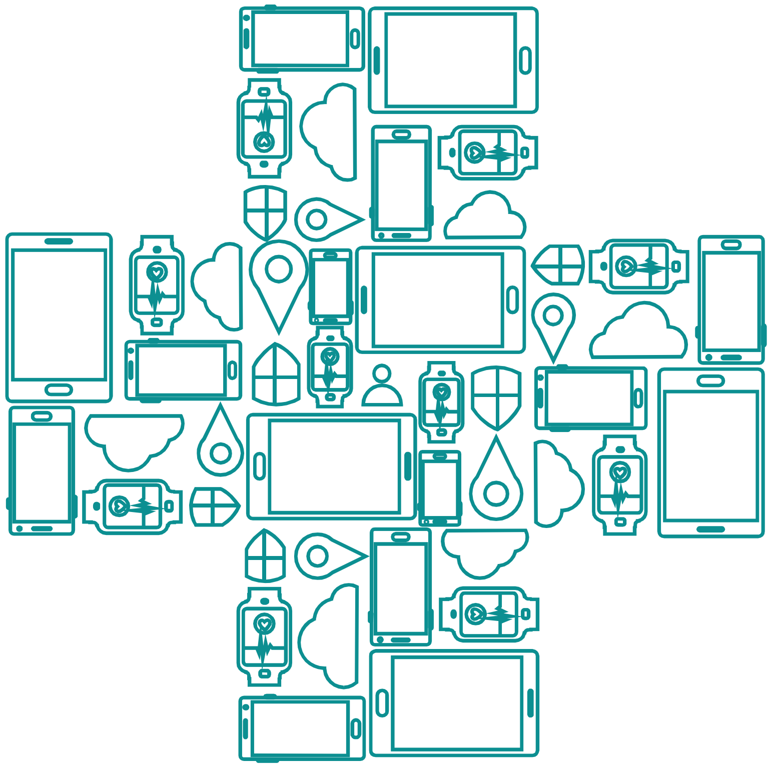
XALAM
FRONTIER MARKETS



MIDDLE EAST & NORTH AFRICA DATA CENTER RISING

From Dubai to Dammam and Cairo - How economic visions, AI and the cloud are transforming the Arab world's data center opportunity

Report Overview – Sample Pages - Table of Contents - March 2024

We provide the market data and insights that underpin our clients' investments in digital infrastructure across Africa, the Middle East, emerging Asia and Latin America.

XALAM
FRONTIER MARKETS

Introduction: Data centers as a digital anchor of the Arab world's economic transformation

XALAM FRONTIER MARKETS

- For the past decade, countries in the Middle East and North Africa (MENA) region have been engaged in an extraordinary attempt at economic transformation. Marshalling billions of dollars of investment, governments have sought to reduce their countries' dependence on oil, through gigantic investment in infrastructure to build commerce, tourism and technology hubs. Anchoring this transformation has been considerable investment in digital infrastructure. Historically, this mostly meant submarine cables, 4G and 5G broadband and increased terrestrial fiber density. Today, data centers, cloud and Artificial intelligence have become vital pillars of MENA's digital infrastructure investments.

- Recent data center market growth has been solid enough. Over the past three years (to 2023), nearly 40 new commercial facilities have come live in MENA, nearly doubling the region's live IT load, on the back of extensive submarine cable buildout, explosive Internet data traffic and increased cloud adoption. But it is the region's outlook that truly captures attention. In true Middle Eastern form, the region's stated ambitions are eye-popping. In Saudi Arabia alone, the government has called for an $18bn investment in hyperscale facilities to increase the country's capacity to 1300MW of IT load. Taking announcements and other plans at face value, MENA data center projects would unleash upwards of 2500MW of IT load capacity across the region over the next decade.

- This upside is not without pitfalls. As this report was going to print, the Gaza war had stoked geopolitical tensions, raising fears of a spillover across the region. Houthi attacks on Red Sea shipping lines are disrupting supply chains and setting back infrastructure projects. And there are other dangers, from over-ambitious projects to overly concentrated Internet markets.

- Still, the upside is unmistakable. MENA, and Gulf Cooperation Council (GCC) markets in particular, offer some of the world's best fundamentals for expanded commercial colocation services: rising digital and new technology demand, hyperscalers bulking up their local presence, a pioneering push towards AI, supportive, vision-driven governments, low power costs, mega investments in renewables, stable currencies – and high lease prices.

- At a time when opportunities for returns seem increasingly scarce in a high interest rate environment, our numbers suggest that the Middle East's singular combination of economic vision, cloud and AI push make the region's data center business one of the most extraordinary digital infrastructure investment opportunity in the Global South.

They are transforming Middle East and North African data center markets

XALAM FRONTIER MARKETS

Khazna
center3
GPX Global Systems, Inc.
AQABA DIGITAL HUB
MORO
GDH Gulf Data Hub
Batelco
e& etisalat and
inwi
QUANTUM SWITCH
EQUINIX
ميزة MEEZA
kalaam
du
RAYA Data Center
ooredoo
N+ONE DATACENTERS
موبايلي Mobily
orange
zain
Atlas Cloud Services
DATAMOUNT
EDGNEX DATA CENTRES by DAMAC
telecomegypt
OMAN DATAPARK
QST

Research scope, structure and sample pages

What exactly is in this report?

XALAM
FRONTIER MARKETS

How this report is structured

Table of contents detail (1)

Table of contents detail (2)

Table of contents detail (3) – Key charts

REGIONAL ANALYSIS

SAUDI ARABIA

Table of contents detail (4) – Key charts

XALAM ANALYTICS

UNITED ARAB EMIRATES

EGYPT

QATAR

BAHRAIN

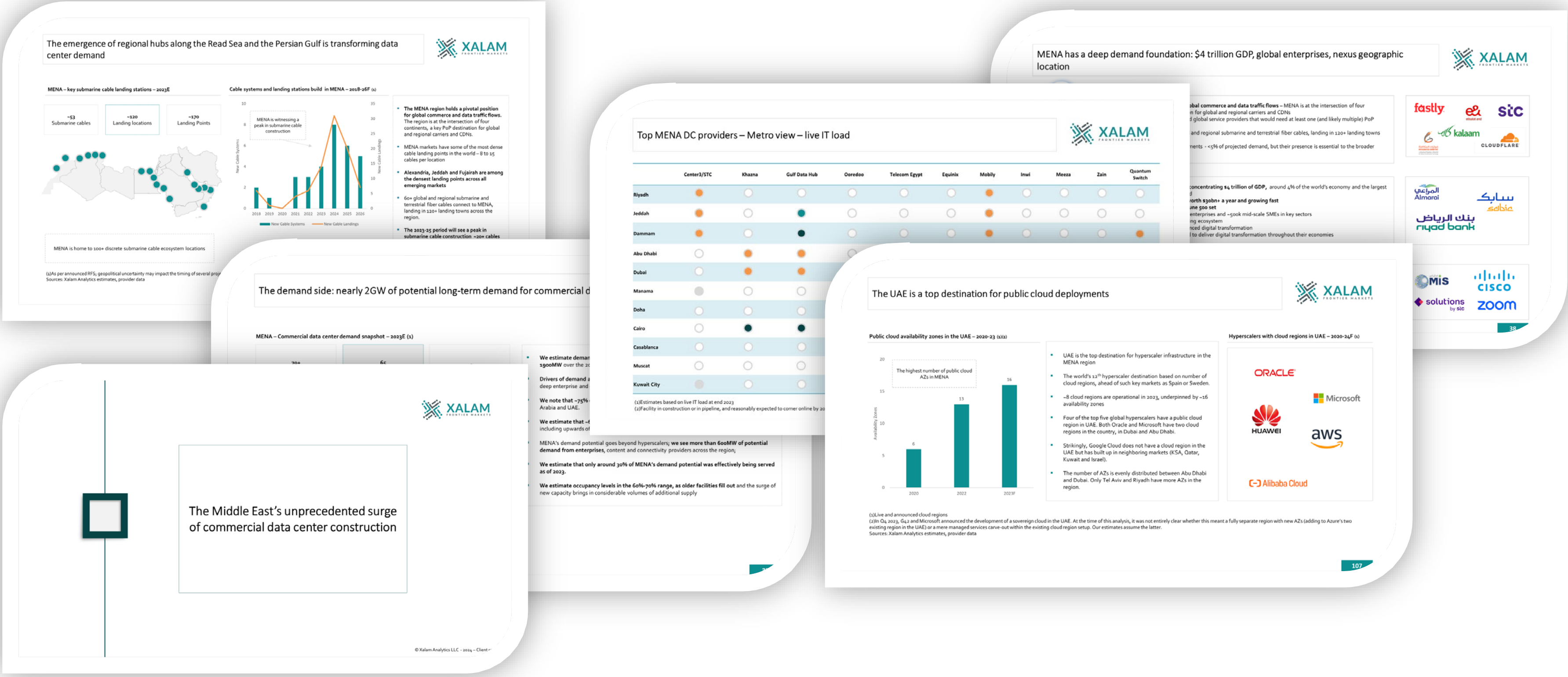
JORDAN

KUWAIT

MOROCCO

OMAN

Sample pages

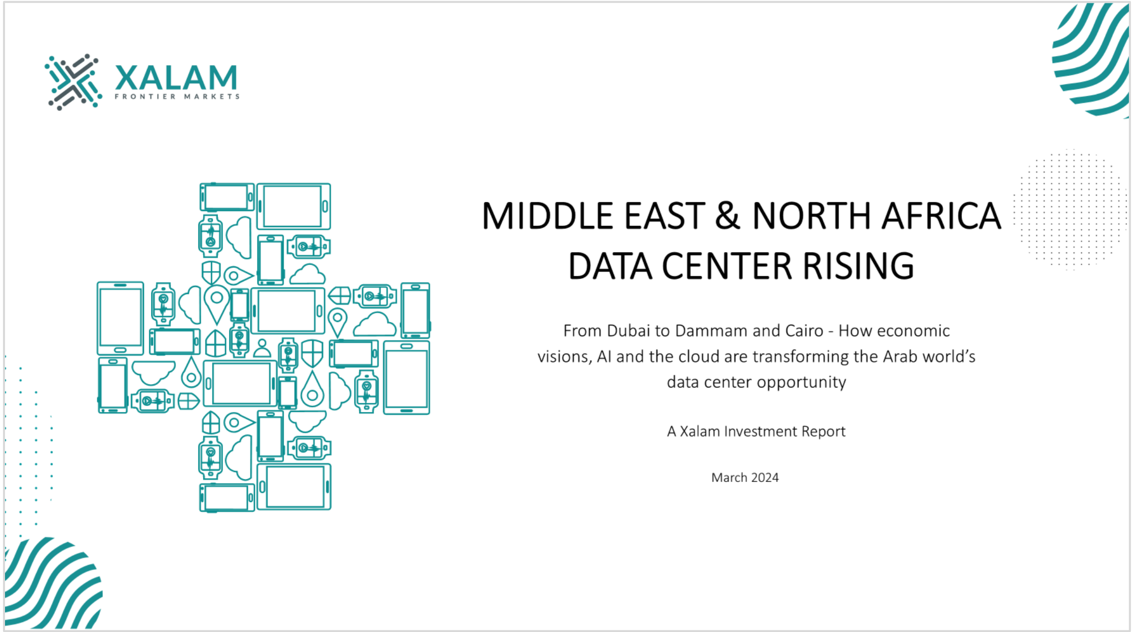


Packages and pricing

Report package

Report package, including:

- Full report in PDF format
- 190 pages, including ~100 Charts and Visuals
- 50 core charts with underlying data in Excel format
- Enterprise license



- **Price: $2500**

Invoice payment also available; please contact hello@xalamanalytics.com

@xalamanalytics
www.xalamanalytics.com