The Southeast Asia Data Centre Market

A look at new players and key drivers as well as the opportunities and challenges in Asia

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Agenda

- Asia Pacific Landscape
- Impact of end-user devices
- Impact of online services
- DCIM (DataCentre Infrastructure Management)
- DataCentre Security
- CSOEP (Certified Service Oriented Enterprise Professional)
- Background & BICSI Relationship
- DataCentre SEA Report
Asia Pacific Landscape
Asia Pacific Market Landscape

BroadGroup estimates that around 85-90% of Asian data centre space is in-house (owned by corporates, government, SMEs), and this varies from around 75% in Singapore to 95% in Indonesia.

**DataCentre Markets**

<table>
<thead>
<tr>
<th>Tier</th>
<th>Markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tier I</td>
<td>Singapore, Hong Kong, Tokyo</td>
</tr>
<tr>
<td>Tier II</td>
<td>Sydney, Shanghai, Kuala Lumpur, Taipei</td>
</tr>
<tr>
<td>Tier III</td>
<td>Manila, Melbourne, Seoul, Shenzhen</td>
</tr>
<tr>
<td>Developing</td>
<td>Vietnam, Cambodia, Indonesia, Brunei, China Provincial</td>
</tr>
</tbody>
</table>

Source: BroadGroup
Market growth and customer analysis in APAC indicates a strong demand for Data Centre services—especially in the areas of Infrastructure as a Service and Platform as a Service (IaaS and PaaS).

Expansion and investments are often led by US groups such as Digital Realty or Equinix, but also include those building up a regional presence such as Global Switch or CSF Malaysia, creating both more opportunity and an ability to deal with the same supplier in multiple countries.
Asia Pacific Market Landscape

The third party market is owned by: Telcos, carrier neutral players or systems integrators, vendors or specialist providers.

The target market often varies but typically is directed around one of the following segments:

- Pure shell and core space – just space and power
- Co-location – basic hosting of servers
- Simple managed services such as remote monitoring
- Managed hosting – managing website and Internet traffic
- Disaster recovery and business continuity
- Managed services – such as application management, database management, storage management, back up management as offered by many Asian and global telcos
- Advanced management services – which could private cloud and total outsourcing solutions, as offered by companies management as offered by many Asian and global telcos
Four broad markets will pertain over the next few years:

- South East Asia
- Greater China + North Asia
- Australia/New Zealand

largest and fastest growing will be Greater China.
Asia Pacific Market Landscape

Market share by ‘000 m² of datacentre space by 2015

- S E Asia: 35%
- Greater China: 26%
- North Asia: 23%
- Australia/NZ: 17%

Source: BroadGroup
Asia Pacific Market Landscape

Market share by m2 of datacentre space

Source: BroadGroup
Impact of end-user devices

Exponential growth impacting the capacity requirements of Telco operators & DataCentres.

Source: Singapore Today Newspaper 22 Nov 2012
# Impact of online services

## Internet Penetration in South East Asia

**Facebook and Social Media in South East Asia**

<table>
<thead>
<tr>
<th>Country</th>
<th>Population</th>
<th>GDP (PPP) Per Capita</th>
<th>Internet Users</th>
<th>Internet Pen.</th>
<th>Facebook Penetration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Singapore</td>
<td>5,183,700</td>
<td>$59,936</td>
<td>3,598,074</td>
<td>70%</td>
<td>70.78%</td>
</tr>
<tr>
<td>Brunei</td>
<td>401,890</td>
<td>$49,517</td>
<td>197,514</td>
<td>50%</td>
<td>73.36%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>28,318,000</td>
<td>$15,578</td>
<td>15,635,925</td>
<td>55.3%</td>
<td>72.58%</td>
</tr>
<tr>
<td>Thailand</td>
<td>64,964,000</td>
<td>$9,693</td>
<td>14,063,287</td>
<td>21.2%</td>
<td>78.27%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>240,271,522</td>
<td>$4,668</td>
<td>22,110,119</td>
<td>9.1%</td>
<td>143.53%</td>
</tr>
<tr>
<td>Philippines</td>
<td>93,983,000</td>
<td>$4,111</td>
<td>24,975,044</td>
<td>25%</td>
<td>92.91%</td>
</tr>
</tbody>
</table>

Source: [http://www.mvfglobal.com/south-east-asia](http://www.mvfglobal.com/south-east-asia)
DataCentre Infrastructure Management (DCIM)

DCIM extends Service challenges in the DataCentre. Tools & Processes will grow exponentially and requires integration between the IT and DC layers.

Source: Globeron – CSOEP framework
Challenges & Skill Gaps
Cloud Computing & Cloud Services
- Private Cloud
- Public Cloud

Social Networking (e.g. identity thefts)

Regulatory requirements
- e.g. Monetary Authority Singapore (MAS) Enhanced DataCentre Requirements for the Financial Industry.
Certified Service Oriented Enterprise Professional

Addressing Skill gaps:

Service Oriented Certification:
1. DataCentre
2. Infrastructure & Architecture
   1. Processes
   2. Security
   3. Management

Copyright: Globeron – CSOEP framework
Background & BICSI Relationship
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BICSI Member: #237560

http://www.csoep.com/

https://www.bicsi.org/ams/outside_vendor.aspx

<table>
<thead>
<tr>
<th>RCDD</th>
<th>RITP</th>
<th>ESS</th>
<th>NTS</th>
<th>OSP</th>
<th>WD</th>
<th>Installer 2 Copper/Fiber</th>
<th>Technician</th>
<th>Certified Trainer</th>
</tr>
</thead>
<tbody>
<tr>
<td>32</td>
<td>32</td>
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<td>32</td>
<td>32</td>
<td>15</td>
<td>18</td>
<td>32</td>
<td></td>
</tr>
</tbody>
</table>

Globeron is the leading training provider in Service Oriented Enterprise/Cloud Computing Services (DataCentre+Infrastructure+Process+Security+Management), Wireless and Security Domains.

Speaker at past conferences:
6th BICSI South East Asia Conference in 2008 – Globeron - Service Oriented Enterprise (CSOEP)
8th BICSI South East Asia Conference in 2010 – Motorola Solutions – Wireless Security Risks
BroadGroup is the leading data centre consulting practice and has the largest library of research reports in the data centre sector worldwide. Furthermore, they lead in DataCentre events.

Speaker at past conferences:
6th BICSI South East Asia Conference in 2008
DataCentres South East Asia - Research Report
Available Q1 - 2013
http://www.broad-group.com/
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