

Data Centre Opportunity Framework(TM)

Mapping Asia's Digital Infrastructure Growth

A comprehensive framework for evaluating data centre investment opportunities across Asian markets. Covers power availability, regulatory environment, connectivity, talent pool, and demand drivers to produce a market readiness score.

Purpose

The Data Centre Opportunity Framework(TM) helps investors, operators and policymakers decide whether a specific Asian market is genuinely ready for data centre investment. By scoring power and land, regulatory environment, connectivity, talent pool and demand signal, it separates headline market enthusiasm from executable opportunity and indicates where a market's binding constraint actually sits.

Components

1. Power & Land

Sufficient and reliable power supply with land availability

2. Regulatory Environment

Clear, supportive policy framework with stable governance

3. Connectivity

Submarine cable landing points and cross-border fibre links

4. Talent Pool

Local engineering and operations talent availability

5. Demand Signal

Confirmed hyperscaler and enterprise demand

How to use it

Score each of the five dimensions for the target market using verifiable data, not promotional material. For power and land, obtain grid capacity figures, tariff structures and actual land availability with zoning certainty. For regulatory environment, assess data sovereignty rules, licensing timelines and policy stability across election cycles. For connectivity, map submarine cable landing points, cross-border fibre and latency to major demand centres. For talent pool, test the real availability of electrical and mechanical engineers, not just headline graduate numbers. For demand signal, distinguish confirmed hyperscaler commitments from expressions of interest. Weight the dimensions to reflect your risk appetite, identify the binding constraint, and compare markets on weakest-link performance rather than average score. Revisit scores quarterly; regulatory and power positions shift quickly in Asian markets.

Worked example

Although designed for Asian digital infrastructure, the framework's logic transfers to any capital-intensive infrastructure bet, as PIA's investigation of Denver International Airport's automated baggage system shows. Opened in 1995, the airport delayed its opening by over a year largely because of the baggage system's failures. Scored retrospectively, the 'power and land' analogue - physical and spatial provision - was inadequate: the system's complexity had to be retrofitted into tunnels and spaces not designed around it. The regulatory and governance environment was permissive to the point of weakness, with the city committing to

an unproven technology at full scale. Connectivity, in the form of systems integration between carts, scanners and controls, was the binding constraint and was underestimated. The talent and contractor base could not deliver what was specified. Demand signal - airline requirements - was real but could not rescue a project whose other dimensions failed.

Limitations

The framework scores readiness; it does not price deals, model returns or predict policy shocks. Data quality varies sharply across Asian markets, and published figures on power capacity or hyperscaler demand are often promotional. Weightings are judgement calls, so two analysts can reach different scores on the same market. It is a screening tool to structure diligence, not a substitute for site-level commercial and technical due diligence.

Relationship to PMOS

PIA intends the framework to feed PMOS's portfolio module: market readiness scores would sit alongside project delivery data so sponsors can see whether underperformance reflects the market or the execution. This integration is on the PMOS roadmap; the scoring model is currently applied manually in PIA's research.

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This document is the canonical reference version of the framework.