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India: Cloud and Data Centre Growth in India - 2021 to 2025

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Abstracts

About the Report

This 67-page report provides a complete up to date analysis of the third-party Data Centre market in India.

About India

India has the availability of water and fibre connectivity including the connection via international sub marine cables – well over ten. New Data Centre expansion being focused on the largest cities including Mumbai and Navi Mumbai.

The large cloud computing providers (AWS, Microsoft Cloud & Google Cloud Platform) all now have a local cloud presence in India, with facilities being introduced to cater for data sovereignty concerns. Government legislation is likely to stop personal data being stored outside of India in the future and is already preventing personal payment data from being sent outside the country.

The Indian Government has established a National e-Governance Plan (NeGP) and a GI Cloud Initiative to set up a cloud enabled Data Centre, National Data Centres and infrastructure as a State Area Wide Network (SWAN).

The vast majority of Indian Data Centre facilities have been developed as third-party sites, but there has been some investment by Amazon (AWS) in dedicated Hyperscale Data Centre facilities. Other Cloud Service Providers (CSPs) rent capacity from third-party Hyperscale Data Centre facilities. Most investment is being ploughed into third-party Data Centre facilities suitable for Hyperscale user needs, with larger campus

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facilities under development by Indian Data Centre Providers – a new trend is the partnerships being formed between Indian Data Centre Providers and foreign investors.

India has become one of the fastest growing Data Centre & Cloud markets in the world, and the report looks at the Data Centre & Cloud landscape in India, with a forecast for the 4 years from the beginning of 2021 to the beginning of 2025 – including:

Indian Data Centre raised floor space (in m2)

Indian Data Centre Customer Power (DCCP in MW)

Indian Data Centre capex investment (in millions of USD)

Indian Data Centre revenues (in millions of USD)

Indian Public Cloud revenues (in millions of USD)

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SECTION ONE – THE INDIAN DATA CENTRE LANDSCAPE – FROM THE BEGINNING OF 2021 TO THE BEGINNING OF 2025 – EXAMINES THE IMPORTANCE OF INDIA AS A GEOGRAPHICAL LOCATION, MID-WAY BETWEEN EUROPE AND ASIA:

DCP considers the growth of India as an economic power, with cloud, mobile, digital technology adoption and usage.
DCP also considers the state of Indian fibre connectivity including subsea cable connectivity and the development of domestic fibre connectivity and the availability of Dark Fibre services.
DCP evaluates the availability of power for Data Centres in India, with energy costs and the development of power and renewable power resources
Finally, DCP examines the regulatory framework for the Indian market, including for personal data usage, data sovereignty and the Indian central Government & municipal governments role in encouraging cloud services and e-commerce.

SECTION TWO – THE KEY INDIAN DATA CENTRE PROFILES – FROM THE BEGINNING OF 2021 TO THE BEGINNING OF 2025 – EXAMINES THE KEY INDIAN DATA CENTRE PROVIDER PROFILES AND CSPS (CLOUD SERVICE PROVIDERS):

DCP provides a profile on the Data Centre Provider & CSPs - with details on strategy, facilities available, the products offered and power and space availability with the key new investments being made.
DCP examines the geographical spread and location of the key Data Centre facilities across India, with the main Data Centre City Clusters that are being formed, with ecosystem development and the total investments being made in new third-party Data Centre facilities and dedicated Hyperscale Data Centre facilities
DCP provides a summary of the Key Indian Data Centre & Cloud statistics as of the beginning of 2021.

SECTION THREE – THE INDIAN DATA CENTRE - TRENDS, FORECASTS & CONCLUSIONS – FROM THE BEGINNING OF 2021 TO THE BEGINNING OF 2025 – EXAMINES THE KEY TRENDS IN THE REPORT AND PROVIDES A 4-YEAR FORECAST FROM THE BEGINNING OF 2021 TO THE BEGINNING OF 2025 INCLUDING:

DCP provides a summary of the key trends impacting the Indian Data Centre market (both third-party & dedicated Hyperscale segments) identified in the report.

DCP creates a 4-year forecast for third-party Indian Data Centre Providers & Dedicated Hyperscale facilities in the Indian market measured by Data Centre raised floor space (in m2) & DCCP (Data Centre Customer Power in MW), Data Centre revenues and Data Centre investments (in millions of USD) from the beginning of 2021 to the beginning of 2025.

Finally, DCP provides the key conclusions to the Data Centre India from the beginning of 2021 to the beginning of 2025 survey.

Appendix One – A list of Cloud & Data Centre Providers that are included in the report

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