Data is the Future, The Future is Datacentre
What’s driving Data and Datacentre growth in India!

33%+ CAGR Cloud growth
India Cloud market will be $5B in next few years. Hyperscalers are driving Datacenter growth in India.
73% of the outsourcing pie

23% CAGR Colo growth thru hybrid cloud
50% Enterprise IT infra is still NOT outsourced.
27% of the outsourcing pie.
Hyperscalers are also leveraging colo in India.

$1 trillion digital transactions by 2025
190 million monthly UPI transactions.
360 million e-commerce users in India.
736 million Aadhar linked bank accounts

Data sovereignty regulations
Draft Data Protection Bill (2018) for personal data.

Edge DC & Device momentum
<USD 0.3 /GB of data, 80% drop in 3 years.
From 30% to 70% Internet coverage by 2026
50% traffic (video & ecommerce) from Tier 2/3
Enterprise Cloud spread beyond Tier 1 cities.

Investment
Ready to invest and build in advance.
$5M/MW
Capex intensive ($100M per 20 MW, 7+ yr ROI)
Government’s DC Policies and IT/ITeS
India’s share at ~2% of World, projected to double in 18 months.

India at ~250 MW designed capacity today, will reach ~500MW in 18 months and 1000MW+ in 4 years. USA added ~500 MW last year.

India 2nd largest DC market in APAC. China growing at 4x-5x vs India.

World colocation growing at ~12% CAGR, India at 23% CAGR.
15 existing DC with 85 MW across 8 Cities, 160 MW of additional expansion
#1 colo player in India with 33% market share and revenue share!

**Existing Capacities**

- **Delhi**: 3 data centres
- **Ahmedabad**: 1 data centre
- **Mumbai**: 3 data centres
- **Pune**: 1 data centre
- **Bengaluru**: 3 data centres
- **Chennai**: 2 data centres
- **Hyderabad**: 1 data centre
- **Kolkata**: 1 data centre

**New Upcoming Capacities**

- **Delhi NCR DC**: Total 30 MW
- **Mumbai DC**: Total 45 MW
- **Bengaluru**: 18 MW (RFS in Oct 2019)
- **Pune DC2 & DC3**: Total 30 MW
- **Hyderabad**: 15 MW
- **Chennai**: Total 20.5 MW. (RFS in Nov 2019)

**Existing IT load of 85 MW**

**Upcoming Capacities, IT load of 160 MW**

How is STT GDC India addressing the datacentre growth!
STT GDC India can help you scale in India and other geos!

Global player with headquarters in Singapore, 5 geographies, 90 DCs and 700MW+ of IT Load Capacity

80+ Data Centres*
16+ Major Business Markets

Top 5 DC Player in the UK

10 Data centres in the UK

No.1 DC Player in China
25% Market Share

53 Data centres in China

Top 5 DC Player in India
33% Market Share

15 Data centres in India

No.1 DC Player in India
25% Market Share

7 Data centres in Singapore

Top 5 DC Player in Singapore

STT GDC India can help you scale in India and other geos!

Notes
*Figures include third party sites and sites under construction as at March 2019, except for China (GDS) updated as at December 2018 per quarterly release.
In Summary

- Customer Demand is growing at 30%
- Providers are reciprocating by investing in advance
- STT GDC India is leading the charter with 33% market share

Thank You and Have a Great Day!