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A VIRTUAL CONFERENCE

DATA CENTRES IN INDIA

Growth Drivers, Emerging Trends and Market Outlook

November 17-18, 2021

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DATA CENTRES IN INDIA

MISSION

- India's fledgling digital economy is driving the data centre growth in the country. From on-premise data centres to cloud deployments to hyperscale and edge computing, data centres are becoming more sophisticated to keep pace with the dynamic business world.
- The Covid-19 pandemic has been a watershed event for the Indian data centre market. With a growing distributed and remote workforce, digitalisation and cloud migration became central to every organisation's business continuity strategy. Further, data usage has grown exponentially owing to high e-commerce activity, and increased social media and OTT usage. All these factors have created a huge demand for data centre infrastructure across the country.
- The growth is also being fuelled by the adoption of cutting-edge technologies such as IoT, big data analytics and smart city applications. The setting up of data centres has become vital for big technology firms owing to the government's data localisation norms, which call for critical citizen data to be stored within the country. Further, 5G services require a vast network of edge data centre deployments.
- As a result, in the past one year, the Indian data centre market has witnessed significant investment and expansion activity. As per industry estimates, the Indian data centre market has attracted close to $977 million in private equity and strategic investments since 2008. This is expected to grow to $3.7 billion over the next three years.
- Several global investors are making inroads into the Indian market, while homegrown players are scaling up their existing footprint. Several state governments have also come forward to announce monetary and other incentives to attract investments.
- The release of the draft Data Centre Policy in November 2020, which aims to establish India as a global data centre hub, is being hailed by industry stakeholders. Amongst the various proposals floated under the draft policy, granting of infrastructure status to the industry is being seen as a game changer as it will ease the process of obtaining long-term credit, while also simplifying procedures to set up data centres in India. The government is also working on a scheme to incentivise the establishment of hyperscale data centres.
- While the anticipated growth in capacities fares well for the industry, it also puts immense pressure on power requirements. As it is, the industrial data centres are amongst the biggest consumers of power in the country. Thus, it is imperative that the industry increases its focus on making the infrastructure energy efficient. The concept of green data centres is already gaining traction and several sustainability focused innovations are being explored by players.
- Sustainability practices have also become central to construction techniques, design and use of building materials in data centre infrastructure, making it more resilient and easy to scale up.
- On the technology front, emerging technologies such as AI, IoT, cloud and edge computing are transforming the operational capacity of data centres and making them more agile, secure and efficient.
- **The mission of this virtual conference is to examine the key emerging trends and progress in the data centre market in India, discuss emerging business models, assess new and upcoming opportunities, highlight the experience of data centre players, and discuss key challenges. The conference will also provide a platform for key industry stakeholders to share experiences, exchange ideas, and showcase the latest innovations and technologies.**

Target Audience

The conference is targeted at top and middle-level managers from:

- Data centre operators
- Data centre equipment manufacturers
- Technology & solution providers - IT Infrastructure, Data Security, Cloud, 5G, etc
- Telecom operators
- Telecom tower companies
- OFC companies
- DCIM & Edge solution providers
- Power solution providers
- Renewable energy companies
- Broadband service providers
- Energy management consultants
- EPC contractors
- Global investors
- Enterprises from different verticals (utilities, retail, BFSI, manufacturing, etc)
- Policymakers and regulators
- Industry analysts
- Financial institutions
- Legal consultants

AGENDA/STRUCTURE

MARKET TRENDS AND OUTLOOK

- What is the current status of the data centre market in India? What are the emerging trends and growth drivers?
- How has Covid-19 impacted the demand?
- What are the key challenges and future outlook?

KEYNOTE SESSION: GOVERNMENT'S PERSPECTIVE

- What key measures are being undertaken by the government in the data centre space?
- What is the progress on the draft data centre policy?
- What are incentives/support that the industry players can look forward to in the near term?

STATE FOCUS

- What are the key state-wide data centre projects being rolled out?
- What are the various incentives being offered to attract private sector investment?
- What are the future plans for expansion and investments?

INDUSTRY PERSPECTIVE

- How has the Indian data centre market evolved in the past three years? What are the key opportunities and challenges?
- What are your current focus areas and future plans?
- What are your expectations on the policy/ regulatory front?

CLOUD DATA CENTRES

- What are the key demand drivers for cloud-based data storage?
- What are the various cloud-based models being adopted by enterprises?
- What are the key risks? What is your outlook for the segment?

KEY CONSUMER SEGMENTS: DEMAND FROM ENTERPRISES, SMART CITIES AND E-GOVERNANCE APPLICATIONS

- What are the key factors driving the demand from key consumer segments?
- What are the key adoption trends? What are the various deployment models currently in use?
- What are the key challenges and future outlook?

EMERGING FOCUS AREAS I: HYPERSCALE DATA CENTRES AND DATA CENTRE PARKS

- What is the current footprint of hyperscale data centres in India?
- What are the key factors driving their adoption?
- What are the key challenges and opportunities in this space?

DESIGN AND BUILD STRATEGIES

- What are the emerging trends in the design and construction of data centres?
- What are the key building materials being used?
- What are the design, material and structure requirements for green data centres?

SUSTAINABLE DATA CENTRES – FOCUS ON ENERGY EFFICIENCY AND GOING GREEN

- What are the key trends in power consumption and management in data centres?
- What are the key solutions that can help in energy optimisation? What steps are being taken to reduce the carbon footprint of data centres?
- What have been the adoption trends for green energy/renewable energy?

EMERGING FOCUS AREAS II: MICRO AND EDGE DATA CENTRES

- What is the current footprint of micro and edge data centres in India?
- What are the key factors driving their adoption?
- What are the key challenges and opportunities in this space?

SMART DATA CENTRES: ROLE OF IOT, AI & ML AND VIRTUALISATION

- What are the emerging trends in data centre modernisation and infrastructure management?
- How are technologies like AI, IoT, virtualisation, softwarisation and automation helping data centre operations?
- What are the key challenges in deployment? What is the future outlook?

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DATA CENTRES IN INDIA

AGENDA/STRUCTURE

TELCO FOCUS AREAS AND PLANS

- How are telecom operators leveraging the opportunities in the data centre space?
- What are your focus areas in this regard? What are some of the recent initiatives?
- What are the future plans in terms of expansion, investments and partnerships?

DATA PROTECTION AND SECURITY CONSIDERATIONS

- What are the key cybersecurity-related issues faced by data centre players?
- What are the emerging technologies/solutions being used to secure data centres?
- What is the future outlook?

IMPACT OF 5G

- What are the key data centre requirements for 5G?
- How will the onset of 5G impact the uptake of data centre services in India?
- What will be the key challenges and opportunities?

FIBERISATION REQUIREMENTS

- What is the role of optic fibre cabling in data centres?
- What is the current level of data centre fiberisation in India?
- How are the fiberisation requirements changing with the advent of next-generation technologies?

ROLE OF TOWERCOS

- What role can towercos play in the data centre space?
- What are the key opportunities and benefits?
- What are the key challenges?

What differentiates our conferences?

- The **agenda** is developed by our researchers, who track the sector round the year. It is thus **relevant** and **topical**. It is not driven by a particular organisation and does not have a particular slant.
- The **speakers** are **professionals** and **experts** involved in the sector, not a mix of ambassadors, ministers, celebrities and business owners.
- The conferences do not just comprise panels and speeches; they provide a good mix of **expert presentations** and **case histories**, and of course **panel discussions**.
- We have **representation** from **across the country**, as is the case at our physical conferences too.
- Each **stakeholder group** – **policymakers**, **developers**, **financiers**, **consultants** and **relevant NGOs** – is represented at our conferences.
- The moderators merely ask the questions. The **stars** are the **speakers** themselves.
- The **sessions begin and end on time**.
- There is adequate time for a **Q&A session** with **each speaker**. These are not “hit and run” speeches.
- The **delegates** are **professionals** who are vested in the sector, and are not just assembled through social media.
- A **recap** of the conference is also made available to reinforce the key takeaways.

Previous Participants

The participants who have attended related conferences in the power, renewable, smart cities and telecom sectors have included: Aarvee Associates, ABB, Accelsap Consulting Services, Accenture, ACE Control Tech, ACE Enterprise, Aceline Infosolutions, ACME Cleantech Solutions, Actaris, Adani Power, Aditya Infotech, ADJ Engineering, AECOM, Aerzen Machines, Agence Francaise De Development, AIUT Technologies LLP, Aksh Optifibre, AkzoNobel, Al Ain Consulting Engineers L.L.C, ALSTOM, Amara Raja Batteries, Analysys Mason, Andritz Hydro, Anritsu, Apar Industries, APDCL, Applied Solar Technologies, Arcadis, Ardom Telecom, Arki Techno Consultants, ARS Energy, Arudra Engineers, Arvind, Ascend Telecom Infrastructure, Ashok Leyland, ATC India Towers, Atha Group, Australian Trade and Investment Commission (Austrade), Avantha Power, AVEVA Information Technology, Avineon India, B4S Solutions, Bahwan Cybertek, Bajaj Electricals, Balkrishna Industries, Bangalore Electricity Supply Company, Banyan Tree Advisors, Barco, BBNL, BCG, Beijing SPC Environment, Bhagalpur Smart City, Bharat Heavy Electricals, Bharat Sanchar Nigam Limited, Bharti Infratel, BHEL, Birla Cable, Birla Furukawa, Black & Veatch, Blue Star, BMR Advisors, BMW Steels, Boradband India Forum, BPL Telecom, Bray Controls, BSES Rajdhani Power, BSES Yamuna Power, BTL EPC, Busch Vacuum, Bygging, CA Technologies, Canada Trade Office, Capgemini, Capitel Partners, Care Rating, CBRE Asia Pacific, Central Electricity Authority, CESC, Chhattisgarh State Power Generation Company, China Telecom, CLP India, CMC, CMS Computers, COAI, Coastal Gujarat Power, Consus Consulting, Copius Capital Advisors LLP, Corning Technologies India, Coslight India Telecom, Cottagon S.A., CPCL, CPRI, Creative Microsystems, CRISIL, Critigen, CSRI NEERI, Cummins, Customized Energy Solutions, Cyient, Damodar Valley Corporation, Datagen Power, DB Power, Delhi Development Authority, Deloitte, Deloitte Touche Tohmatsu, Delta Electronics, Deltos Infra, Descon, Diamond Power, DMRC, DOT Ministry of Communication, DPSC, Druk Green Power Corporation, DSCL, DSM India, Dynalog, EagleBurgmann, Earthmetry, Easun Reyrolle, ECI Telecom, ECIL, Edelweiss ARC, Edelweiss Asset Reconstruction Company, Edifice Consultants, Edotco Group, Edwards India, Efftronics, EGIS, Elara Capital, Emerson Network, Enercon, Enersys India Batteries, Envision, Environnement SA India, EPTISA India, Ernst & Young LLP, ESDS, ESRI, Essential Energy India, ETAP Automation, Evalueserve, Exide, EY, Facile Maven, Fedders Lloyd, Ferbeck International, Finolex, Firefly Networks, FLSmidth, Fluentgrid, Forbes Marshall, Fox Solutions, GAIA Smart Cities, Gayatri, GE Grid Solutions, GE Power India, GE South Asia, Genesis Infra Project Consultants, Genus, GIFT, GMR, Greenko Group, GSECL, GSK Powertel, GTL Infrastructure, Gujarat International Finance Tec-City, Gurugram Metropolitan Development Authority, Guwahati Municipal Corporation, H2L-Vedanta, Haryana Power Generation Corporation, Havells, HBL Power, HCL Technologies, HEG, Hexagon, Himachal Futuristic Communications, Hindustan Controls, Hindustan Zinc, Hiranandani Communities, Hitachi, Honeywell, HP, HPCL, HPGCL, Huawei India, Huber Suhner, HUDCO, Hughes, Hyderabad Metropolitan Development Authority, IBM India, IBUS Networks, ICICI Bank, ICRA, ICSA, Idam Infrastructure, Idea Cellular, Ideck, IDFC Alternatives, IDFC Bank, IFS, IIFCL, Independent Architecture Planning Consultant, India Power, India Uniper Power Services, Indiana Conveyers, Indo Rama Petrochemicals, Indore Smart City, Indus Energy Consultants, Indus Towers, Infokool, Infosys, Infotech, Infozech, Intelligent Energy, Invendis Technologies India, Invensys, IOCL, IP Design Studio, IPE Global, IT System Integration Organization, Itron, Jabalpur Smart City, Jaiprakash Associates, Jaiprakash Power Ventures, Jaypee Bina Thermal Power Plant, Jaypee Ventures, Jindal Power, Jindal Stainless, JLL, JSPL, JSW, K Raheja Corp, Karam Industries, Kaveri Communications, KEC International, Keith Electronics, Khika, Kirloskar Oil Engines, KLG Systel, Knight Frank, Kotkar Energy Dynamics, KPCL, KPIT, KPMG, Krohm Solutions, KSK Energy, L&T ECC, L&T Smart World & Communication, L&T-Sargent & Lundy, Lahmeyer, LANCO, Lapp Holding, Lea Associates, Leena PowerTech, Lekha Wireless, Lifeline Technologies, Lubrizol Advanced Materials, M.N. Dastur & Company, M&I Materials, Maco Corporation, MACOM Technology Solutions, Madhya Pradesh Paschim Kshetra Vidyut Vitaran Company, MagikMinds Software, Mahadiscom, Maharashtra State Power Generation, Mahindra & Mahindra, Mahindra Consulting Engineer, Maithon Power, Manifold, Mars Telecom Systems, Maruti Udyog, Mascot Capital & Marketing, Matrix Comsec, MCT India, MEG, Megha Engineering & Infrastructures, Merchem Limited, METSO, Microtex Energy, Ministry of Communications & Information Technology, Ministry of Electronics & Information Technology-Govt. of India, Ministry of Housing and Urban Affairs, Ministry of Power, MINRAJ Consultants, Mitsubishi Heavy Industries, Morrison Hershfield Corp, Motilal Oswal, Mott MacDonald, MOXA, MSEB Holding Company, MTNL, Multi-Act Equity Consultancy, Munters India, Nabha Power, Nascent Infotech, NDMC, NDMC Smart City, NEC Technologies India, NEEPCO, NELCO, NESCO, Nevco Engineers, Nexant, NHPC, Nippon AMC, Nish Automation, NLC India, Nokia India, North South GIS, NPCL, NPTI, NSOFT (INDIA), NTPC, Odisha Electricity Regulatory Commission, Okaya Power, OMC Power, OMNI AGATE Systems, Opower, Oracle, Organo Corporation, Oriental Nicco Projects, OSI, Outokumpu, Owens Corning, Panasonic India, Paramount, Paramount Cables, Paramount Communication, Parbati-Koldam Transmission Co., PCI Limited, Perfect Controls, PFC Consulting, PGCIL, PGVCL, Philips, Phoenix IT, Pimpri Chinchward Municipal Corporation, Planet Smart City, PMAS, PMI Associates, Polycab, PowerGrid, PowerOne Data, Powertec, Praj Industries, Prasanna Technologies, Pratap Technocrats, ProArch Solutions, Protiviti, PRS Permacel, PTC, PTPS, Pune Smart City, PWC, PWD, Quadgen Wireless, Quadrant Consultants, Quality Austria Central Asia, Ramboll, Ramboll India, Ramco, Rare Enterprise, RattanIndia Power, RBC Capital Markets, REC, Reconnect Energy, Red Hat, Regency Infotech, Reli-e-Marg Software, Reliance, Reliance Jamnagar, Reliance Jio Infocomm, Riken Instrumentation, RMSI, Rockwell Automation, Rodic Consultants, Rolta, Rosenberger Electronic Co., RRVVNL, RS Consultant, Rudis LLC Trbovje, RuggedCom, Rustomjee, RV Solutions, Sai Computers, SAI Electricals, Sangir Plastics, SAP, SAS, SBI Capital Markets, SBI Caps, Schneider Electric, SCOPE, Secure Matrix, Secure meters, Securities Investment, SEI Trading, Sembcorp Green Infra, Sensus, SEW Infrastructure, Shah Technical Consultants, Siemens, Sify, Sikora India, Simco Group, Simona India, Softspin Services, Space TeleInfra, Spaceworld, SPANCO, SPC Environment Protection Tech, Spectranet, Speedon Networks, SPML, SRF, SSM Infotech, ST Microelectronics, Stalwart Advisors, State Grid Corporation of China, Steag, STEAG Energy, STELLAR Architect & Green Building Consultants, Stelmec, Sterlite, Sterlite FTTH, Sterlite Technologies, STL, STUP Consultants, Sun Microsystems, Suntech Group, Suyog Telematics, Svarn Group, SW Energy, Synergy Telecom, SYSTRA Group, Tafe Motors, TAIPA, TANGEDCO, Tarantula, Tata Automated Systems, Tata Communication, Tata Communications, Tata Consulting Engineers, TATA Cummins, Tata Power, Tata Power Renewable Energy, Tata Projects, Tata Steel, TCIL, TCS, Tech Mahindra, Techlineage, Technica Associates, Tecknobridge Software Solutions, TeestaUrja, Tek Components, Telecom Network Solutions, Telecom Regulatory Authority of India, TelEnergy Technologies, Telesonic Networks, TenovaDelkor, TERI, Thane Smart City, THDC, The New India Assurance Co., ThinkSpace BIM Consultancy Services LLP, Tikona Infinet, Tirumala Seven Hills, Torrent Power, Toshiba, Tower and Infrastructure Providers Association, Tower Vision, Toyo Engineering, Trading Engineers (International), Transit Intelligence, Trivananthpuram Smart City, TUV SUD South Asia, TVA Star Engineering Solutions, U.P. 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1 Login	9,000	1,620	10,620	150
2 - 3 Logins	15,000	2,700	17,700	250
4 - 5 Logins	21,000	3,780	24,780	350
6 - 9 Logins	27,000	4,860	31,860	450
10 - 20 Logins	33,000	5,940	38,940	550

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