Case study

Cloud Services in India

Indian Industry Challenges

In the last few years cloud demand has exploded in India. AI, containerization, edge computing and Kubernetes adoption have all been surging, driving a hunger for high-performance, interconnected and compliant infrastructure. And with 800 million Internet users, a hugely successful (and internationally focused) IT services industry, and an economy on course to $10 trillion by 2030, the stakes could not be higher.

The Pan-Indian cloud market is increasing at an average CAGR of 44% per year. According to Structure Research, the market for cloud services is set to grow from $6.5BN in 2023 to $25.5BN in 2028. There are already a dozen cloud regions up and running, with many new zones in the pipeline from Hyderabad to Chennai, from Mumbai to Delhi-NCR.

According to some estimates, India's IT service sector includes 20% of the global chip-design workforce. The IT and business process management industry employs over 5 million people and has a phenomenal 55% share of the global market for IT services. Other sectors such as banking, finance, healthcare and manufacturing, are booming too, and are aiming to shift 70-80% of their workloads, according to IDC, to the cloud for cost-effectiveness and reliability.

IRON MOUNTAIN®
DATA CENTERS

Industry

Cloud Services in India

Challenges

> AI integration
> Scalability
> Interconnection
> Security
> Quality

Solutions

> Power pipeline
> Pan-India footprint
> Mature ecosystems
> Leading compliance

An AI-Ready, Connection-Rich Partner

In 2021 Iron Mountain Data Centers (IMDC) started a joint venture with Web Werks, one of India's top colocation providers. Web Werks already operated three carrier-neutral data centers in Mumbai, Pune and Delhi-NCR, and owned land for a greenfield data center in Navi Mumbai. Our joint objective was to become one of the few global data center providers to offer a pan-India capability backed by the interconnected, compliant and scalable infrastructure needed to support growing demand from multinationals, hyperscale cloud providers and ambitious Indian digital businesses.
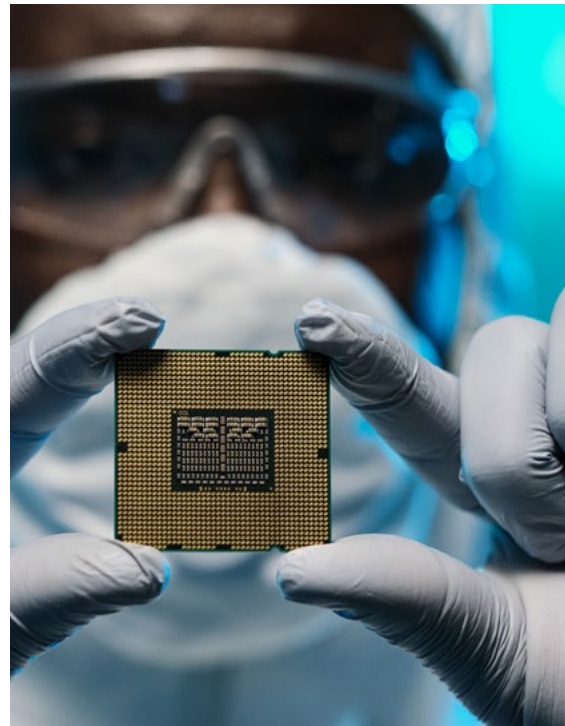
Growth has been rapid. Within two years we added new sites and grew potential customer data center space from 158,000 sqft (14,700 m^2) to 484,000 sqft (44,700 m^2). We currently serve every type of cloud provider from IaaS and PaaS through SaaS, private clouds, hosters and MSPs with either new or upgraded facilities in Mumbai and Hyderabad (the two most cloud-rich regions currently) as well as Delhi-NCR, Pune and Bengaluru.

More Power in More Places

Reliable power supply in the face of growing demand can be an issue in India. By 2026 the majority of cloud applications will use AI and the implications of this for power requirements are significant.

Our strategy in India has been shaped to address this shift. We now have power agreements in place to ramp up total availability across our 7 facilities to 70 MW. As the bulk of our data centers are new builds with flexible power management, we can also offer the high densities and advanced cooling that AI requires.

"Iron Mountain adds value for our customers by opening up partnerships. Our portfolio is extremely broad, but it stops at Hypervisor level so is not very deep. For depth our customers need to find partners, and if they can access them within the data center then this reduces sprawl and improves performance and security."

Ecosystems & Connectivity

As IaaS, PaaS and SaaS customers develop more retail-style and sector-specific clouds they are also beginning to own the ecosystems they build. Customers are not just interested in a vendor's cloud application stack and delivery models, they also look at the whole ecosystem of providers that brings them value. These long-term alliances require shared values and in many cases - for guaranteed performance - shared space.

Our JV partner Web Werks has been a leading pan-Indian colocation provider for many years. As a result, our most mature campus in Mumbai has an 850-strong customer ecosystem. Customers have convenient in-house access to 9 carriers, 160+ ISPs and four major Internet Exchanges: AMS-IX, De-CIX, Extreme IX and NIXI with direct cloud connects to a growing range of leading providers. Both existing and new facilities on our footprint are interconnected with our Mumbai campus, ensuring a rich ready-made ecosystem for all customers.
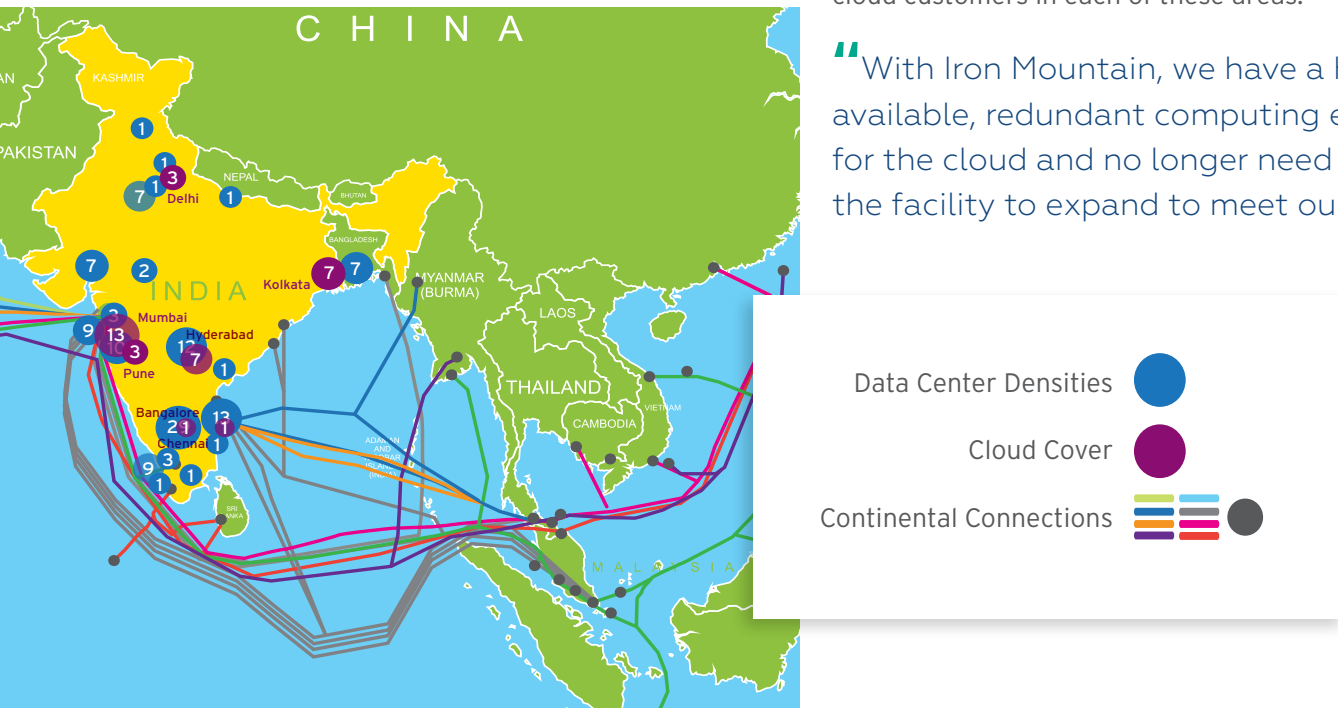
Secure Services

Security is a huge concern for the Indian IT and BFSI industries in particular. For cloud service providers, AI-infused API's for multiple sectors and the increasing focus on security services make the broadest possible compliance framework critical. For infrastructure to support these and other services, data security levels, operational and sector-specific standards need to be consistent across continents. IMDC is renowned for compliance levels across all global regions, and we are in the process of implementing our industry-leading program of third party quality and sectoral certifications across our India facilities. We offer ISO 9001, ISO 27001, SOC 2, PCI-DSS, ISO 50001, ISO 14001 and OSPAR (in APAC).

A Trustworthy Partner

According to IDC's Cloud Pulse Survey trust is the number one factor in cloud vendor selection, and its definition is broadening. We believe that, as trusted partners, data center providers should do their utmost to support their cloud customers in each of these areas.

"With Iron Mountain, we have a highly available, redundant computing environment for the cloud and no longer need to wait for the facility to expand to meet our needs."

Data Center Densities

Cloud Cover

Continental Connections

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About Iron Mountain Data Centers