sify

Economic & Social Impact Assessment

Sify Infinit Spaces Limited

A subsidiary of Sify Technologies Limited

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Table of content

About Sify Technologies and Sify Infinit Spaces 05

Economic and Social Impact of SISL 10

Key Demand Drivers for Data Centers 21

Why Sify is Poised for Success 28

AT A GLANCE:
SISL's Economic and Social Impact

₹4,408 Cr
of economic activity enabled

₹1,447 Cr
added to India's Gross Value Added (GVA):
nearly 3× the national budget for the IndiaAI Mission (FY25)

Per capita GVA of SISL employee:
55×
the national working average

₹103 Cr
in income generated

10,362
jobs supported across the ecosystem

Siruseri Data Center Investment is equivalent to
4%
of Chennai's Gross Fixed Capital Formation (GFCF)

Noida Data Center Investment is equivalent to
4%
of Gautam Buddha Nagar's GFCF

New educational institutions emerged within a
4-km radius
of SISL's campuses:
One school and three colleges in Vashi; one school in Rabale

About Sify Technologies and Sify Infinit Spaces

About Sify Technologies Limited

Sify Technologies Limited was incorporated in 1995 as a public limited company. In 1998, it made history by becoming India's first private Internet Service Provider. Just a year later, it became one of the first Indian technology firms to be listed on the NASDAQ - a milestone that reflected its early global ambition and pioneering spirit.

Like the world's most iconic tech companies that have continually reinvented themselves in response to shifting market forces, Sify's journey has been marked by resilience, adaptability, and foresight.

It navigated the dot-com crash, telecom liberalization, and successive waves of digital transformation to emerge as India's only organically grown, fully integrated ICT enterprise.

Sify's evolution - from launching India's first consumer internet services to becoming a digital transformation partner - can be traced through distinct phases of focused reinvention:

1995-1999
Consumer-facing ISP and internet pioneer

2000-2005
Transition into an enterprise services company with MPLS and Data Center services

2006-2012
Emergence as an ICT services provider with the launch of enterprise cloud offering

2013-2017
Shift toward cloud-centric services with hybrid and private cloud solutions

2022 onwards
Repositioned as a full-spectrum digital transformation partner

In FY21, Sify Technologies Limited (STL) undertook a strategic reorganization to deepen specialization and sharpen execution. As the parent company, STL restructured its operations by spinning off its core business lines into independently managed subsidiaries, each focused on distinct growth trajectories while continuing to leverage STL's unified technology architecture and integrated infrastructure.

STL drives India's enterprise connectivity through one of the country's largest MPLS and SD-WAN networks. STL accounted for 40% of the group's revenue in FY25.

Under STL's umbrella are two focused subsidiaries:

1. **Sify Infinit Spaces Limited (SISL)** designs, builds, and operates hyperscale-ready, carrier-neutral data centers across major cities. SISL accounted for 36% of the group revenue in FY25.
2. **Sify Digital Services Limited (SDSL)** enables cloud orchestration, cybersecurity, and digital modernization, helping clients transition from legacy systems to agile, future-ready architectures. SDSL accounted for 24% of the group revenue in FY25.

Mr. Raju Vegesna
Chairman & Managing Director,
Sify Technologies Limited

About Sify Infinit Spaces Limited (SISL)

SISL is the data center subsidiary of Sify Technologies and a cornerstone of India's digital infrastructure landscape. With a growing footprint of hyperscale, carrier-neutral data centers across major cities, SISL provides secure, scalable, and sustainable infrastructure to power the nation's expanding digital economy.

SISL currently operates 14 concurrently maintainable data centers across key locations: seven in Mumbai, two each in Noida and Chennai, and one each in Bengaluru, Hyderabad, and Kolkata. These campuses collectively support over 188 MW of IT power.

Evolution in SISL's offerings:

Enterprise Data Centers : Providing core physical infrastructure for businesses.

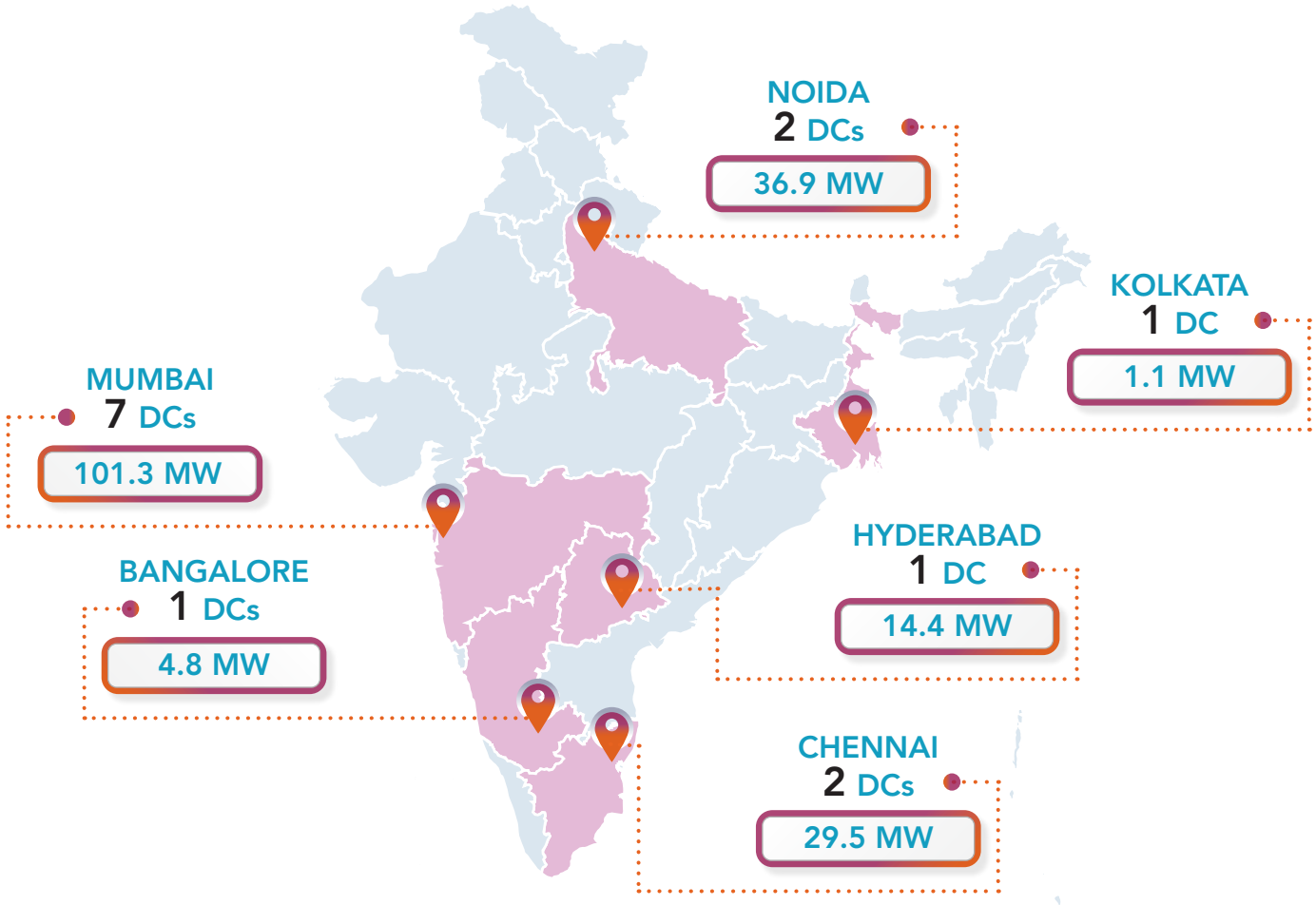
Hyperscale Data Centers : Scaling up to support global cloud and content providers.

Built-to-Suit Facilities : Delivering customized environments tailored to specific client requirements.

AI-Ready Data Centers : Developing next-gen facilities equipped to support high-density computing and AI workloads.

SISL's Data Center Footprint by Location and IT Power (MW)

Total - 14 DCs with 188 MW of IT Power



Its facilities are purpose-built to meet the high-availability demands of cloud service providers, large enterprises, and digital-native businesses. Each data center is engineered for operational excellence and designed to ensure industry-leading uptime, backed by global certifications including ISO 9001 (Quality), ISO 27001 (Information Security), ISO 20000 (Service Management), and PCI DSS (Data Security Standards).

Built on principles of modularity and energy efficiency, SISL's data centers reflect a deep-rooted commitment to sustainable digital infrastructure. By integrating renewable energy sources and advanced cooling technologies, SISL enables clients to meet performance benchmarks while advancing their ESG goals.

As India's first NVIDIA DGX-Ready Data Center partner certified for liquid cooling, SISL offers cost-effective, AI-ready environments tailored to the needs of modern enterprises deploying high-density computing workloads.

In line with its sustainability roadmap, SISL has executed power purchase agreements totaling 306 MW of solar and wind energy to power its hyperscale campuses - of which 99 MW has already been commissioned. This marks a decisive step toward reducing reliance on fossil fuels and significantly lowering the carbon footprint of its fast-growing operations. With parallel investments in both solar and wind, SISL is on track to meet a substantial portion of the energy needs of its flagship campuses - particularly in Mumbai - through renewable sources. The company remains committed to scaling green energy adoption across its entire nationwide data center footprint.

Key Highlights

- 14 modern Data Centers with over 188 MW of IT power
- Scalable and resilient infrastructure with RAS compliance
- Enhanced 10 levels of security with automation
- AI/ML-powered operations for 99.999% uptime and efficiency
- Four diverse fiber paths
- 306 MW of renewable energy contracted
- Data Centers ready for Liquid and Air-Cooling, up to 200 KW per rack
- Hyperconnected, carrier-neutral ecosystem with rich interconnectivity

SISL delivers a comprehensive suite of data center services encompassing:

Colocation Services: SISL provides secure, scalable colocation solutions ranging from single-cabinet deployments to multi-megawatt capacities. These services are housed in carrier-neutral, concurrently maintainable facilities equipped with advanced security measures, including multi-factor authentication and biometric access. Clients benefit from 24x7 support, smart hands services, and value-added offerings such as physical migration assistance and inter-rack cabling.

Built-to-Suit Data Centers: For organizations requiring customized infrastructure, SISL offers built-to-suit data center solutions. These facilities are tailored to specific client requirements, ensuring optimal performance, energy efficiency, and compliance.

Green Data Centers: Designed to align with clients' sustainability goals, SISL's green data centers incorporate energy-efficient technologies and operate at industry-leading levels of power and water usage effectiveness.

SISL's Interconnected Data Centers enables seamless connectivity enable seamless connectivity between 77 data centers across India. Utilizing high-speed, low-latency networks, DCI facilitates dynamic resource allocation, load balancing, and robust redundancy. Features include metro cross-connects with sub-50ms latency and access to multiple cloud providers, ISPs, and content delivery networks.

JOURNEY

MUMBAI 01: VASHI
Type: **India's 1st commercial Data center**
Operational: **2000**

CHENNAI 01: TIDEL PARK
Operational: **2001**

MUMBAI 02: AIROLI
Type: **Sify's 1st Cloud Data center**
Operational: **2008**

BENGALURU 01: ELECTRONIC CITY
Type: **Purpose-built Data center**
Operational: **2001**

NOIDA 01
Type: **North India's 1st Hyperscale Data center**
Operational: **2011**

MUMBAI 03: RABALE
Type: **AI-ready Hyperscale Data Center Campus**
Operational: **2013**
Tower 5 now live | 7 new towers to be operational in the coming years

KOLKATA
Type: **Cloud Data Center**
Operational: **2018**

HYDERABAD 01: FINANCIAL DISTRICT
Type: **Hyperscale Data Center Campus**
Operational: **2016**

NOIDA 02
Type: **AI-ready Hyperscale Data Center Campus**
Operational: **Tower B: 2025 Tower A&C to be operational in the coming years**

CHENNAI 02: SIRUSERI
Type: **AI-ready Hyperscale Data Center Campus**
Operational: **Tower B: 2025 Tower A&C to be operational in the coming years**

Economic and Social Impact

SISL is quietly becoming the scaffolding for India's digital future – an essential but often overlooked enabler of economic dynamism in a digital-first world. While its core business lies in managing and operating data centers, its true contribution extends far beyond infrastructure. SISL powers the backbone of digital services that fuel sectors ranging from e-commerce and fintech to healthtech, education, and enterprise IT. In doing so, it is not just facilitating data flow – it is shaping new economic structures, influencing labor market trends, and enabling regional technology capacity in ways that are invisible to the end user, but deeply transformational to the system.

Its impact cannot be fully captured through conventional metrics such as revenue or capacity utilization alone. Instead, SISL's significance lies in the velocity of digital activity it enables - how quickly businesses can scale,how seamlessly data-driven services operate, and how responsive the ecosystem becomes. Equally important is the breadth of value creation - reaching across supply chains, geographies, and policy landscapes. Whether it's unlocking job opportunities in underserved regions, supporting startups with reliable digital infrastructure, or enhancing India's global competitiveness in tech services, SISL acts as a force multiplier across the digital economy.

This chapter provides an overview of that layered impact - quantifying not just the direct economic contribution of SISL's operations, but also its wider influence on employment, enterprise growth, and ecosystem vitality across India.

Methodology for Estimating Economic Impact

This chapter presents the economic contribution of SISL through two distinct lenses: quantitative and qualitative impact. Together, they provide a holistic view of the value SISL generates across the economy.

Quantitative Impact

The quantitative assessment includes three types of impact:

- **Direct Impact:**
  Represents the economic value generated directly by SISL through its operations.
  These estimates are derived from financial data and operational information provided by SISL.
- **Indirect Impact:**
  Captures the economic activity generated along SISL's value chain.
- **Induced Impact:**
  Reflects the broader economic activity driven by consumption spending of employees associated with SISL and its supply chain.

Indirect and induced impacts have been estimated using a Dun & Bradstreet economic impact assessment model, which applies sector-specific multipliers based on India's input-output tables. These multipliers quantify how activity in one sector stimulates activity in others.

Qualitative Impact

Some of SISL's contributions extend beyond what can be captured through purely numerical or financial indicators. These include business, social and environmental benefits that influence broader ecosystem outcomes. Such qualitative impacts have been assessed through a structured review of secondary research, policy documents, and stakeholder reports.

Quantitative Impact

A. Gross Value Added (GVA)

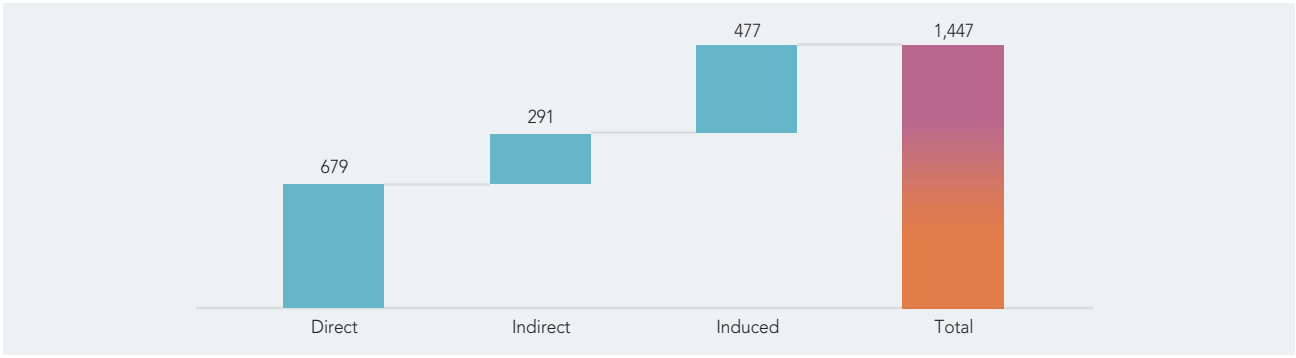
In FY25, SISL contributed ₹1,447 crores to India's gross value added (GVA), underscoring its role as a critical node in the country's digital infrastructure landscape. To contextualize this figure: the total gross value added by SISL is almost thrice the national budget allocated for IndiaAI Mission in FY25 – an area widely viewed as foundational to India's next wave of economic growth.

SISL's total GVA footprint comprises three distinct channels:

- **Direct Impact (₹679 crores):** Stemming from core operations, this represents the value added through its service offerings. It includes wages, salaries, profits, and taxes generated through the company's data center services, representing SISL's direct contribution to the economy.
- **Indirect Impact (₹291 crores):** This includes the ripple effects on SISL's upstream supply chain industries that support its operations - such as logistics, power distribution, facility management, and other ancillary services. These backward linkages stimulate secondary economic activity across diverse sectors.
- **Induced Impact (₹477 crores):** This reflects the broader consumption effect generated through the consumption of goods and services by individuals employed directly or indirectly through SISL's operations. As employees across SISL and its supply chain receive income, a portion of this is spent on housing, transportation, healthcare, education, retail and other services creating a third-order wave of demand that propagates across local and regional economies.

Together, these layers of value creation highlight SISL's role not only as a standalone enterprise but as an economic catalyst embedded within a broader supply and demand chain.

SISL's Contribution to GVA by Channels of Impact (Rs crores)



Source: Dun & Bradstreet

B. Productivity: Driving High Output with a Lean Workforce

With a lean workforce of 264 employees, SISL generated ₹679 crores in direct GVA in FY25. This translates to a per capita GVA of ₹2.6 crores - a productivity level that is:

> **55x higher than the average per capita GVA of ₹0.05 crores per working Indian**

(based on an estimated 63.7 crore working Indians and a total GVA of approximately ₹300 lakh crores).

This level of economic productivity is not incidental. It reflects the capital-intensive nature of the data center industry, the strategic location of assets, and a deliberate focus on automation, uptime reliability, and high-value service delivery. Rather than scale via headcount, SISL's operating model leverages advanced engineering and digital infrastructure to amplify output per employee.

As SISL scales up, this productivity edge is likely to be further institutionalized. This segment is characterized by high margins and global demand tailwinds, offering avenues for sustained, high-quality growth.

C. Output: Catalyzing Growth Across Industries

While both output and GVA measure economic activity, they represent different stages in the value chain. Output refers to the total value of goods and services produced, including the value of intermediate inputs used in production. GVA, on the other hand, isolates the net contribution by subtracting the value of intermediate consumption from output. In essence, GVA reflects the actual economic value created by an entity - through wages, profits, and taxes - whereas output captures the broader transactional volume, including pass-through costs.

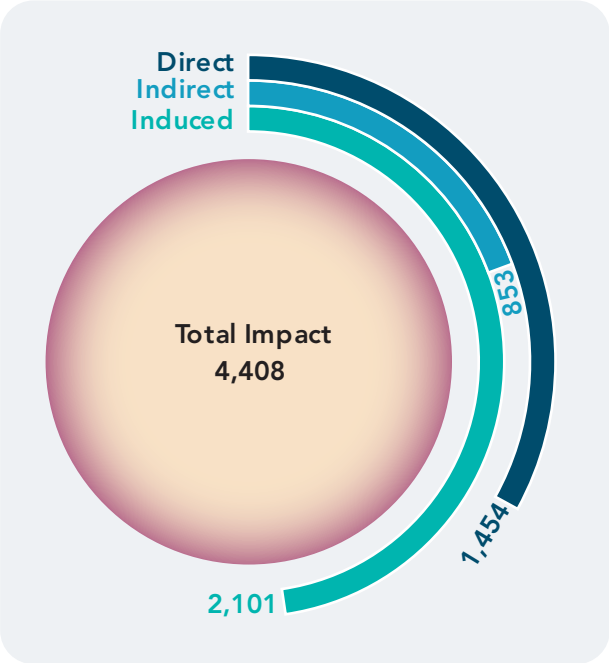
In output terms, SISL enabled **₹4,408** crores of economic activity in FY25. This includes:

- **Direct output (₹1,454 crores):** Core revenues from data center operations and other income.
- **Indirect output (₹853 crores):** Value generated across the supply chain.
- **Induced output (₹2,101 crores):** Consumption-led demand of direct and indirect employees.

SISL's footprint is not confined to metro cities. With facilities across multiple geographies, it plays a foundational role in supporting enterprise workloads, fintech platforms, OTT media, and government digital missions. This decentralized growth model allows SISL to align closely with India's rising digital demand while contributing to regional economic dispersion.

Looking ahead, SISL plans to scale its installed capacity, which will proportionally lift economic output, reinforce backward linkages, and support skilled employment across engineering, facility management, and IT operations.

SISL's Contribution to Output by Channels of Impact (Rs crores)



Source: Dun & Bradstreet

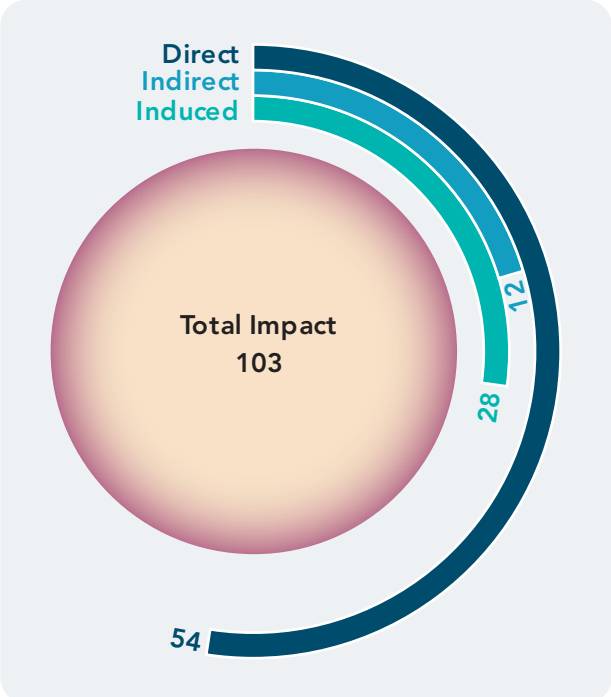
D. Income Generation: Building Income Ladders, Not Just Payrolls

The most impactful economic shifts rarely announce themselves. They emerge quietly - as stable, future-ready jobs in high-productivity sectors - and build income ladders that families can climb over time. For SISL, this isn't just about paying wages; it's about creating durable rungs of opportunity that elevate communities across generations.

In FY25, SISL injected **₹103** crores into the economy - not as an abstract number, but as thousands of real stories of upward mobility.

- **Direct wages (₹54 crores):** This represents the wages paid by SISL to its 264 employees, who earn an average income of ₹21 lakhs per annum. In a country with an average annual income of nearly ₹2 lakhs, this level of remuneration enables upward socioeconomic mobility, particularly for STEM and IT professionals.
- **Indirect income (₹21 crores):** This represents the wages paid by SISL's vendors to their employees. These vendors provide a stable income that helps elevate individuals within the broader economic structure, forming a vital second rung on the income ladder.
- **Induced income (₹28 crores):** This is the result of consumption-driven demand generated by the wages of both direct and indirect employees. As employees of SISL and its vendors spend their earnings on local goods and services – such as in cafeterias, transportation, retail, and wellness services - they create a multiplier effect in the community. This spending fuels local businesses and stimulates micro-entrepreneurial activity, benefiting everyone from small grocers to local service providers like after-school tutors, thereby distributing economic benefits across the wider community.

SISL's Contribution to Income Generation by Channels of Impact (Rs crores)



Source: Dun & Bradstreet

E. Employment Impact: Anchoring a New Type of Urban Labor Economy

Jobs supported during capital investment phase = **8,200**

Jobs supported during operation phase = **2,162**

Since the early 2000s, SISL's data center construction projects have directly employed over **8,200 workers during the capital investment phase alone.** This upfront job creation is only the first step. Sify's approach to labor is rooted in non-discriminatory hiring, workplace protections, and equal benefits. The company actively engages local talent during the establishment phase and provides training that builds employability - even beyond SISL's own needs. Many of these workers are later absorbed into its non-technical operations, creating a sustainable pipeline of employment.

The second-order effects are equally significant: by raising the benchmark for fair labor practices, SISL helps shape a more mature and ethical urban labor market. Over time, this improves job quality across the ecosystem, as workers gain bargaining power and expectations around fair treatment rise.

During its **operational phase**, SISL directly and indirectly supported **2,162 jobs** in FY25, but raw numbers don't tell the full story. These are not legacy industrial jobs. These are "infra-digital" jobs that sit at the intersection of physical infrastructure and digital systems, from cooling engineers to cybersecurity auditors.

- **Direct employment (264 jobs):** SISL's lean yet high-skilled workforce includes data center engineers, electrical and mechanical specialists, system architects, and compliance managers. These professionals are not just running servers - they're safeguarding the digital infrastructure that underpins India's enterprises, banks, media platforms, and government systems.
- **Indirect employment (440 jobs):** SISL's hyperscale and modular data centers (like those in Rabale, Noida, and Chennai) demand specialized execution, creating sustained employment in its supply chain throughout the operational lifecycle.
- **Induced employment (1,458 jobs):** As SISL expands, local PGs open, cafés double staff, cab aggregators add routes, and vendors scale up daily deliveries to support campus populations. These aren't gig jobs - they're community-building occupations, anchored in stable, recurring demand.

What's unique is that employment around data centers tends to be sticky - people stay longer, upskill faster, and invest locally. The network effects aren't just digital; they're human.

> **Data centers are to cities today what auto plants were to cities in the 1980s - a nucleus for urban economic evolution.**

F. Gross Fixed Capital Formation: Laying the Foundations of Tomorrow's Economy

To date, SISL has committed over ₹8,100 crores across its data center investments. The scale of this capital deployment underscores the increasing strategic significance of digital infrastructure as a foundational element driving the growth of urban and regional economies in India.

In Chennai, SISL's ₹2,500 crore investment in its second data center in the region represents approximately 4%* of the district's Gross Fixed Capital Formation (GFCF)

This is a notable contribution, particularly in a district where traditional sectors, like manufacturing, dominate GFCF. By focusing on cutting-edge digital infrastructure, SISL is catalyzing a shift towards technology-driven economic growth in the region.

Similarly, in Noida (Gautam Buddha Nagar), SISL's ₹2,500 crore investment in its data center contributes around 4%* of the district's GFCF. Historically, Noida's GFCF has been driven by sectors like real estate and IT/ITES. The addition of a state-of-the-art data center infrastructure complements and enhances the district's existing economic base, positioning it as a strategic enabler of long-term growth and competitiveness.

These investments are part of a broader trend where digital infrastructure is becoming a core pillar of regional economic development in India. The shift from traditional sectors such as manufacturing and real estate to the inclusion of technology infrastructure is reshaping the landscape of capital formation, highlighting the role of data centers in driving productivity, business expansion, and innovation across various industries.

*Note: * To assess the impact of SISL's investments on district-level GFCF, we began by estimating the Gross District Domestic Product (GDDP) for Chennai and Gautam Buddha Nagar. Since state and district GDP data is typically released with a delay, we projected the state GDP for FY25 by applying a 13% growth rate to the FY24 figures for Tamil Nadu and Uttar Pradesh. We further assumed that Chennai and Gautam Buddha Nagar account for 8% of the respective state GDP, based on the latest available data. To estimate the district-level GFCF, we applied the national GFCF-to-GDP ratio of 30%, assuming that the investment intensity in these districts aligns with the national trend.*

Qualitative Impact

A. Knowledge Spillover: Turning Infrastructure into Intelligence

SISL is not just creating the infrastructure to power India's digital economy - it is actively driving knowledge spillovers that reverberate across sectors, industries, and local economies. This phenomenon is key to understanding how the company's data center operations contribute to the broader economic and technological landscape. Moreover, the company's infrastructure isn't just a conduit for data - it's a catalyst for knowledge spillovers that ripple across industries, upskilling workforces, and advancing technologies. As SISL expands, so does the capability of every client hosted on its servers. But there's a second-order effect:

- **Reskilling the Workforce:** As businesses integrate with SISL's advanced systems, their teams gain expertise in AI pipelines, real-time data processing, and computing. The real-world impact is profound, enabling employees to operate at the cutting edge of technology and innovation.
- **Vendor Evolution:** Beyond clients, SISL's operations push vendor ecosystems to upskill. Electrical contractors, for instance, are shifting from traditional Heating, Ventilation, and Air Conditioning (HVAC) systems to high-tech liquid cooling installations, transferring clean tech knowledge to fields that were once far removed from it.
- **Localized Knowledge Hubs:** Every SISL data center becomes a localized knowledge node, where not only direct employees but entire communities learn, adapt, and grow. The company's decentralized approach to expansion ensures that every new facility helps rewire local economies and workforces, driving a future-ready digital infrastructure.

SISL is redefining the idea of data centers by creating spaces that are not just high-tech but also high impact, fueling technological literacy, and empowering India's workforce for the digital future.

B. Force Multipliers of the Digital Economy: SISL's Role in India's Next Growth Wave

Data centers have been officially accorded infrastructure status by the Government of India in recognition of their role in enabling the country's digital economy. In this landscape, SISL is not just a provider of data center capacity; it is a force multiplier powering India's digital ambitions. Its infrastructure is the silent engine behind the sectors that are redefining India's economic trajectory. From fintech platforms powering real-time payments to edtech solutions reaching remote learners, SISL enables the digital velocity that modern enterprises demand. This transformation is not isolated to metro hubs - it reverberates across manufacturing, healthcare, e-commerce, and public services, quietly reshaping productivity, accessibility, and innovation in Tier 2 and Tier 3 cities. In effect, SISL's footprint extends far beyond server racks -it underwrites the ambitions of a digital India. Few examples of its transformative impact across diverse industries include:

- **National Co-operative Bank:** SISL transformed a legacy network into a cloud-ready, intelligent architecture. This led to enhanced application reliability, centralized network control, improved bandwidth utilization, and increased security - critical for delivering seamless digital banking services across geographies.
- **India's Largest Power Utility Company:** SISL supported India's largest power utility to scale billing applications, serving over 25 million consumers. This solution enabled the utility to create a unified billing system that not only improved scalability but also operational efficiency, ensuring future-proof readiness.
- **Leading Oncology Healthcare Provider:** In the healthcare sector, a leading oncology provider collaborated with SISL to ensure the uninterrupted operation of over 175,000 radiation treatment plans. SISL's secure, highly available cloud platform empowered the healthcare provider to significantly improve patient care quality and operational reliability.
- **Major Retail Chain:** SISL helped a major retail chain modernize its IT infrastructure across over 600 outlets. By implementing hybrid cloud services, SISL enabled the retailer to modernize 80% of its business applications without experiencing service disruption. This transformation enhanced operational agility and ensured seamless business continuity.

- **National Postal Network:** Working alongside a government-run postal network, SISL connected over 30,000 postal locations nationwide. Through managed services, SISL enhanced the efficiency of the network, reducing the Total Cost of Ownership and improving the overall reliability of the infrastructure, creating a more cost-effective solution.
- **Billion-Dollar Chemical Manufacturer:** A billion-dollar chemical manufacturer collaborated with SISL to streamline its IT operations and boost system uptime. With SISL's managed services model, the manufacturer gained improved visibility, reliability, and customer satisfaction, driving operational excellence across its global operations.
- **US-Based Cloud Security Company:** A US-based cloud security company expanded its presence in India by utilizing SISL's colocation services in Mumbai, Noida, and Chennai. This enabled the cloud security company to establish secure, reliable infrastructure, supporting its strategic market entry into one of the world's most dynamic tech regions.

The common thread? These sectors didn't just consume SISL's services - they scaled faster, hired more, served better because of it.

The true economic impact of SISL lies not in its revenue, but in the exponential value created by the businesses that depend on its uptime.

C. Power Infrastructure: Converting Energy Access into Local Growth

Data centers inherently depend on grid stability. But what happens when you improve the grid? Everyone benefits.

In the regions where SISL operates, investments in power infrastructure - such as upgrading transmission lines, expanding transformer capacities, and installing advanced battery storage systems - have become integral practices. These enhancements not only support the seamless operation of data centers but also deliver significant benefits to the surrounding areas.

- **Residential neighborhoods** experience reduced power outages, ensuring greater reliability for everyday living.
- **Small businesses** gain access to higher load capacities, empowering them to grow and expand their operations.
- **Local Distribution Companies (DISCOMs)** benefit from grid-supporting infrastructure investments that enhance efficiency and stability.

SISL is committed to integrating renewable energy through initiatives like solar rooftops, green Power Purchase Agreements (PPAs), and hybrid energy models. SISL has currently contracted 306 MW of renewal energy and is firmly committed to further improving its impact on the environment.

D. Telecom & Connectivity: Revitalizing Local Economies through Digital Infrastructure

Every new data center acts as a catalyst, akin to a stone thrown into a digital pond, creating ripples that expand rapidly across local economies.

To power its operations, SISL consistently invests in laying fiber networks, upgrading internet nodes, and collaborating with telecom providers to ensure seamless, high-quality bandwidth. The impact of these efforts is far-reaching:

- **Local neighborhoods and business districts** benefit from faster internet speeds, transforming the way education, small businesses, and communities connect and operate.
- **The deployment of 5G technology** becomes more viable with the robust backhaul infrastructure supported by SISL's data centers, paving the way for next-generation mobile services.
- **IoT startups** find fertile ground nearby, leveraging low-latency connections, abundant bandwidth, and a conducive environment for innovation and testing.

SISL is fast becoming one of India's most consistent enablers of digital connectivity, particularly in underserved regions.

The best tech infrastructure doesn't just connect servers – it redefines the potential of the regions it serves, opening new doors to growth, innovation, and progress.

E. Empowering Local Businesses: Catalyzing Commercial Agglomeration

SISL's data center investments act as anchor points for broader urban transformation. Beyond direct employees and vendors, their presence attracts a wider constellation of businesses – hospital, educational institutions, tech startups, logistics players, food service operators, co-working spaces, and even real estate developers - drawn by improved infrastructure and growing economic density.

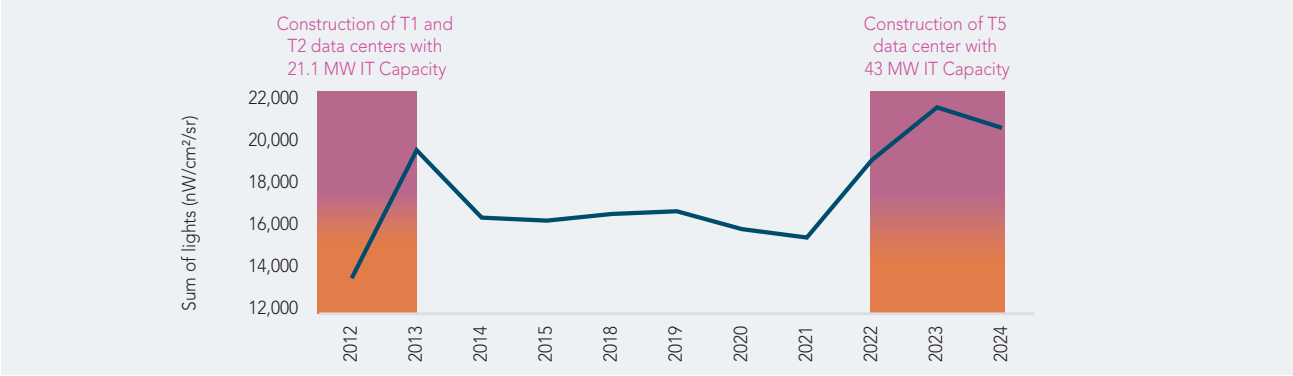
Nighttime luminosity data - a widely accepted proxy for local economic activity - shows distinct spikes aligned with SISL's capital investment cycles. For instance, in Rabale (Navi Mumbai), luminosity surged during the construction of SISL's T1 and T2 data centers in 2013 (21.1 MW IT capacity), and again from 2022 onward with the T5 facility (43 MW IT capacity). These bursts of brightness reflect the temporary employment, infrastructure upgrades, and construction-linked demand that accompany large-scale capital deployments.

What is Luminosity Data?

Luminosity data refers to satellite images that capture nighttime lights on Earth. These lights, visible from space, are a strong indicator of human activity and economic development.

Economists and researchers use changes in night lights over time to track local economic growth, especially in places where traditional data is delayed or unavailable. For example, a sudden increase in brightness in a region often signals increased economic activity - like what's observed around SISL's data centers during their development and operational phases.

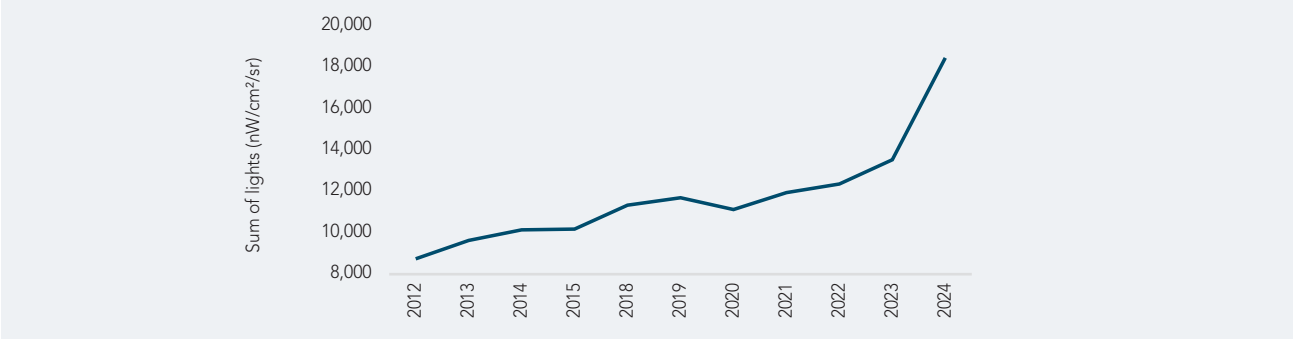
Nighttime Luminosity – Rabale, Navi Mumbai



Source: Dun & Bradstreet

But the story doesn't end with construction. Operational facilities continue to drive sustained activity. In Chennai, where SISL operates a data center at TIDEL Park, the median luminosity in the surrounding area has more than doubled between 2012 and 2024. This mirrors the trajectory of Chennai's GDDP, underscoring how digital infrastructure underpins long-term economic dynamism.

Nighttime Luminosity – Taramani, Chennai



Source: Dun & Bradstreet

Institutional responses echo this trend. For instance,

> **one school and three colleges have emerged within a 4-km radius of SISL's Vashi data center, while Rabale has seen a new school take root in the years since SISL's arrival**

Roads have been widened in Rabale, suburban train frequency has increased in Vashi, and metro connectivity has been expanded near Chennai's data center corridors.

These are not isolated upgrades; they are spillovers catalyzed by SISL's gravitational pull.

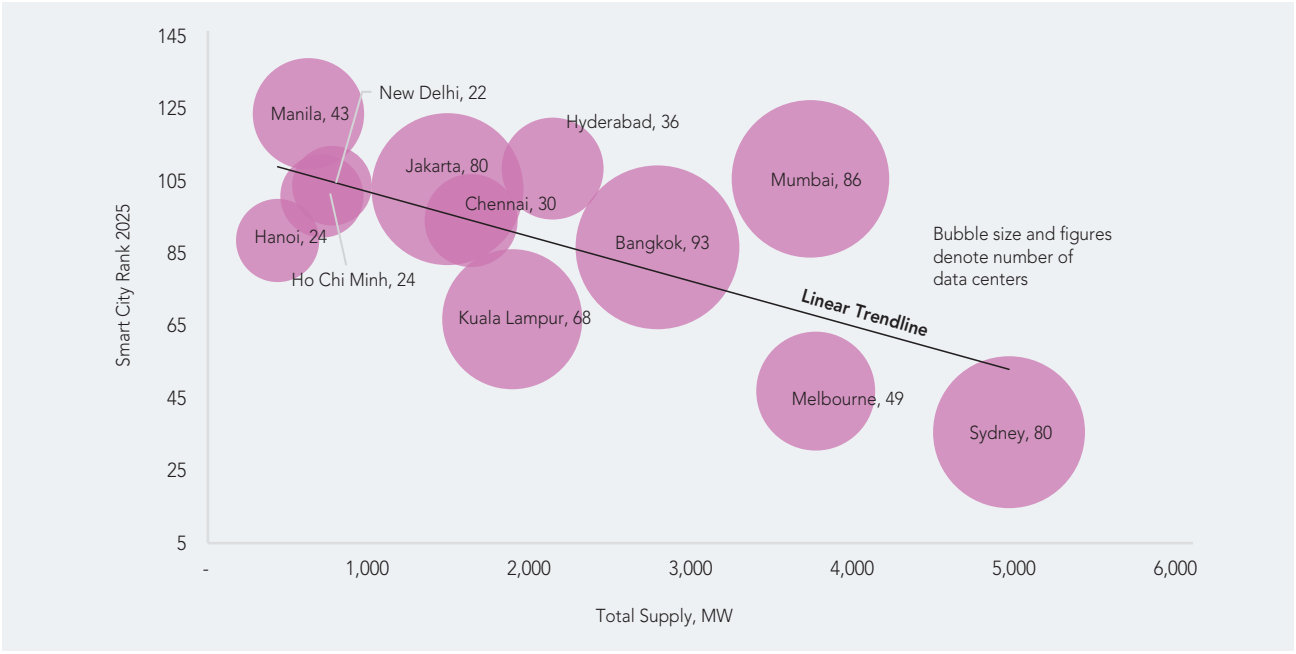
The result is a self-reinforcing ecosystem where improved access, reliable power, and proximity to digital infrastructure lower entry barriers for small businesses. What's more, these local businesses retain profits in the region, circulate capital faster, and drive long-term commercial resilience.

F. Social Fabric: Strengthening the Urban Core through Digital Infrastructure

The economic footprint of data center construction extends well beyond balance sheets - it actively shapes the social fabric of the cities they inhabit. By anchoring modern infrastructure and catalyzing related investments, data centers contribute to safer, more connected, and more livable urban environments. Their integration into smart city plans facilitates tangible quality-of-life improvements - ranging from enhanced mobility and reliable public services to increased safety and better access to digital amenities.

These shifts, in turn, attract new residents, boost footfall for local businesses, and elevate the city's overall appeal to talent and investment. Cities with higher data center capacity consistently lead in smart infrastructure, citizen services, and economic vibrancy, suggesting a reinforcing loop between digital backbone and social wellbeing.

Higher Data Center Supply (MW) - including Live, Under Construction, Committed, and Early-Stage - Correlates with a Better Smart City Ranking



Note: *Chennai's Smart City ranking was not available and has been extrapolated using the trendline equation (y = -0.0129x + 114.5)*
Source: DCByte, IMD

Macro Trends Fueling Growth in Data and Data Centers

1. Increasing Internet Penetration

The global rise in internet penetration is one of the biggest factors fueling the explosion in data generation. More than **two-thirds of the world's population is online.** That's over 500 core people generating data through every search, swipe and stream. And the pace of growth remains relentless. To put the scale in perspective: if all the data created globally in 2024 were stored on double-layer Blu-ray discs (each holding 50 GB and measuring 1.2 mm thick), the stack would reach the Moon - not once, but nine times over.

India is a key driver of this data boom. Three factors are causing an exponential increase in data generation:

- **Coverage:** In just a decade, the number of internet connections in the country has nearly quadrupled - to 97 crores by June 2024 from 25 crores in March 2014.
- **Infrastructure:** By December 2024, 4G mobile connectivity has reached 96% of India's 6.4 lakh villages. Also, India has deployed over 4.6 lakh 5G base stations across 779 districts, marking the **fastest rollout of 5G anywhere in the world**.
- **Speed:** Median mobile broadband speeds have soared to 95.7 Mbps in 2024 from 1.3 Mbps in 2014 - a **73x leap.**

The result is a nearly **350-fold jump in average monthly data consumption** per user - to 21 GB in 2024 from just 62 MB in 2014.

This is not just a surge - it is a structural shift. Higher speeds and wider reach have made high-definition video, real-time gaming, cloud applications, and AI services accessible to crores of users. As internet access deepens and habits mature, each new user represents a compounding node of digital demand.

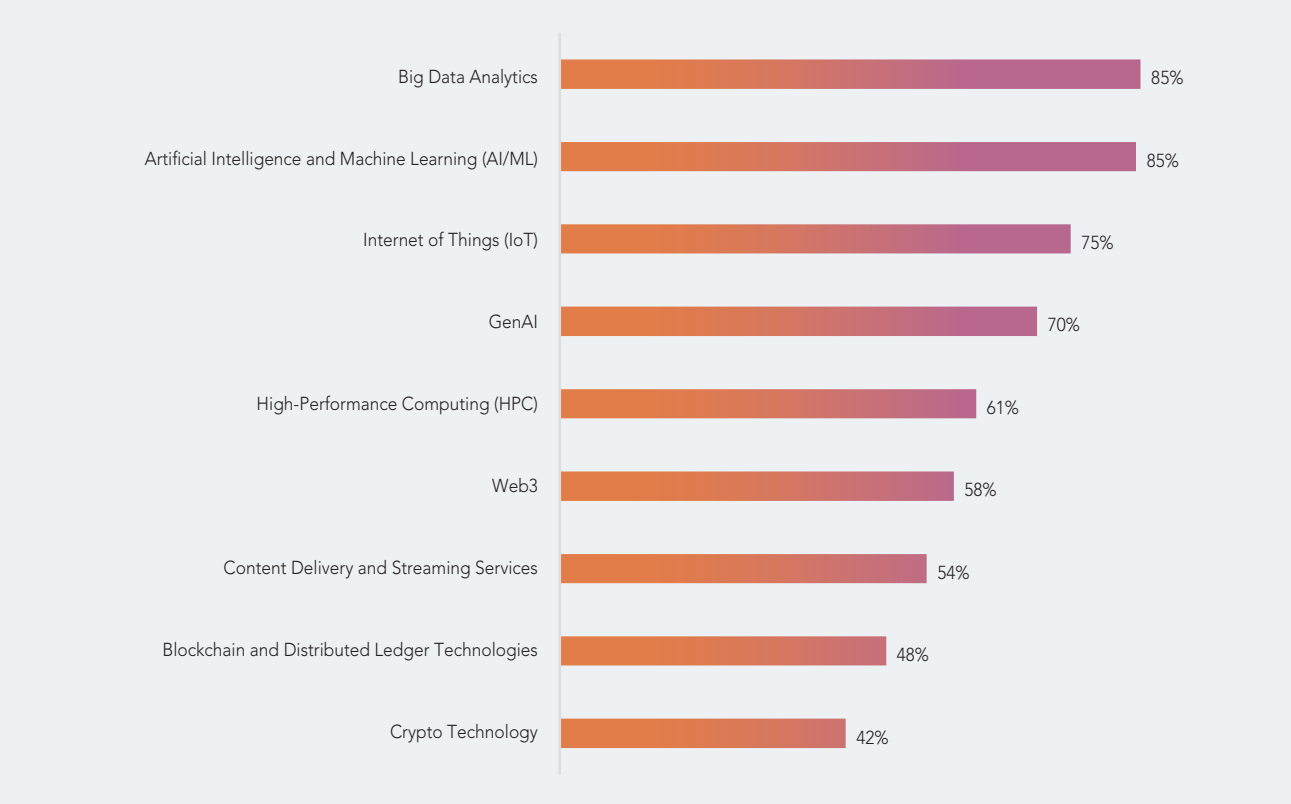
Looking ahead, internet penetration is far from plateauing. India alone is expected to add crores of new users, many of whom will leapfrog directly into data-rich digital ecosystems. Every incremental GB consumed is a trigger for upstream infrastructure - storage, compute, and networking capacity. With internet penetration pushing new demand from tier-1 cities into tier-2, tier-3, and rural regions, the pressure is shifting from centralized hyperscale setups to a distributed data center ecosystem. Low-latency expectations from 5G users, coupled with rising edge workloads, will necessitate a more regionalized, agile data center network.

2. Rise of Data-Intensive Technologies

While internet access enabled data generation, it's the new wave of technologies that's accelerating its complexity – and its scale. Modern enterprises aren't just capturing data; they're architecting operations around it. And that shift is reshaping the demand curve for digital infrastructure.

In a Dun & Bradstreet survey of over 300 Indian enterprises, conducted in April 2025, four emerging technologies stood out as the main drivers of rising data processing and storage needs. Respondents were asked to rate the extent to which each technology is driving their data processing and storage needs on a scale of 1 to 10 - 85% gave a top-tier score (8–10) to **Artificial Intelligence and Machine Learning (AI/ML) and Big Data Analytics,** confirming their dominance.

Top Technologies Increasing Data Processing and Storage Needs (Percentage of respondents rating 8 or above on a 10-point scale)



Source: Dun & Bradstreet Survey

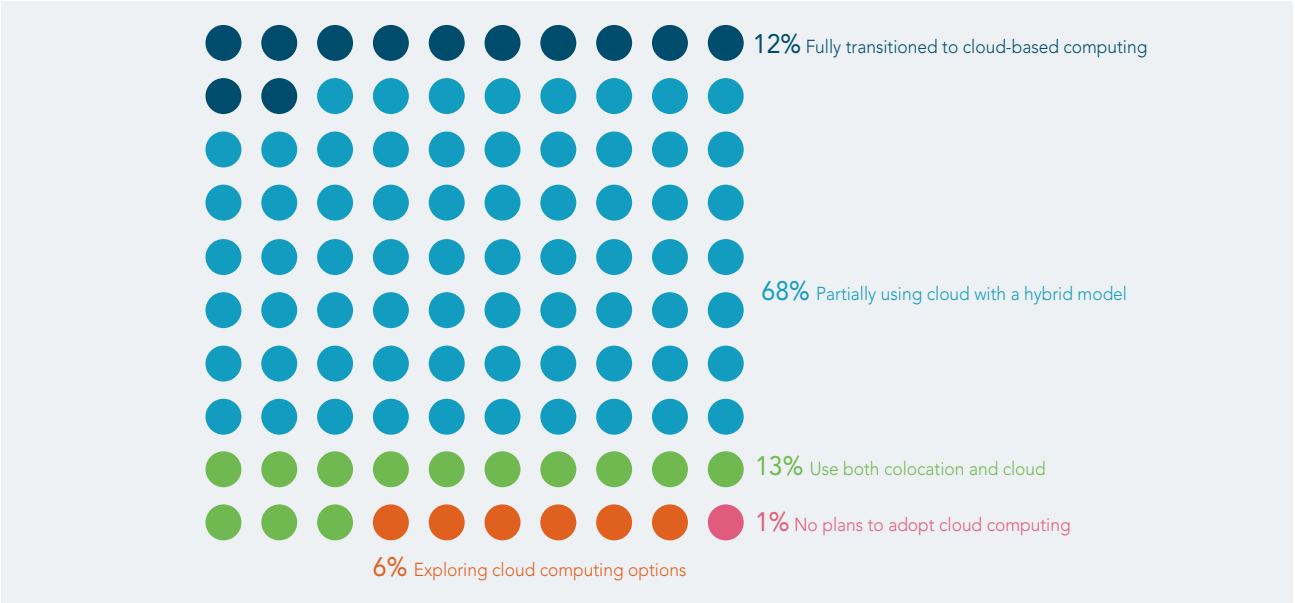
Close behind were **Internet of Things (IoT) at 75% and Generative AI (GenAI) at 70%,** both of which are redefining how - and where - data gets created and consumed. Technologies like High-Performance Computing, Web3, and blockchain are expanding this frontier further, driving up demand not just for space, but for high-density, low-latency environments. As these technologies move from pilots to enterprise-wide adoption, data centers will need to evolve from static storage hubs to agile compute engines.

3. Accelerating Digital Transformation

As organizations reimagine operations, customer engagement, and product delivery through technology, demand for compute and storage is rising sharply - placing cloud adoption at the center of this shift.

Dun & Bradstreet's survey reveals that while **only a third of firms** continue to **rely on their own on-premises infrastructure**, the majority are shifting workloads to public or private cloud environments. This migration is not merely about cost or flexibility - it's about future-readiness.

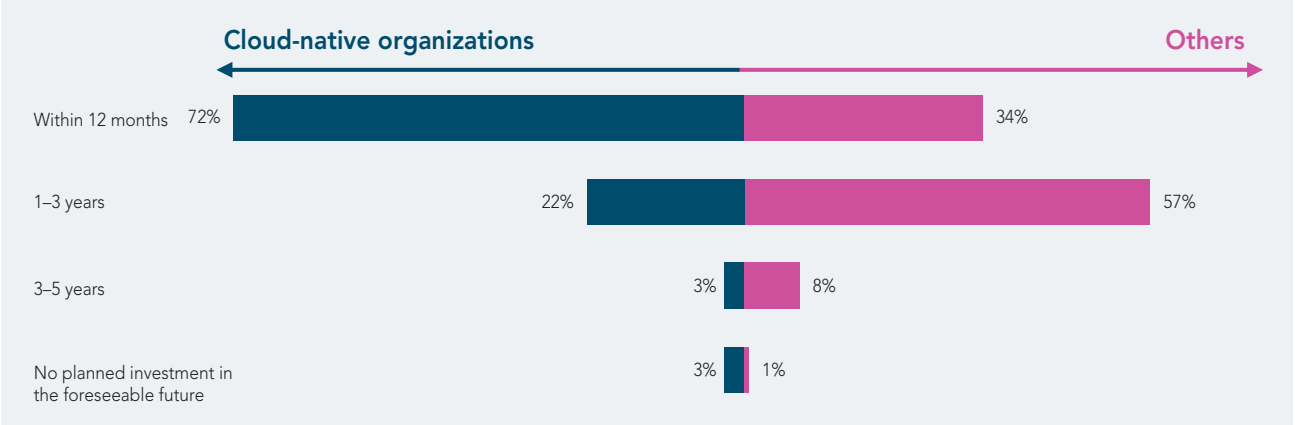
Current Stage in Adopting Cloud Computing (Percentage of respondents)



Source: Dun & Bradstreet Survey

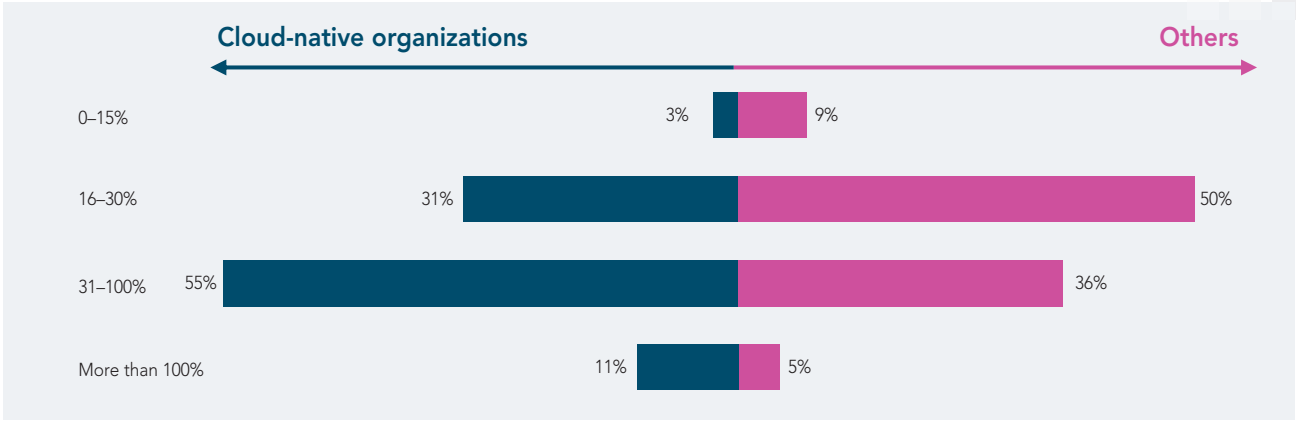
Cloud-native organizations, those that have fully transitioned to cloud computing, are pulling ahead in terms of IT scalability, agility, and investment pace. These early movers are setting the tone for data center demand. **Nearly three in four** expect to **expand infrastructure within the next 12 months,** and **over half anticipate capacity growth of 31–100%** over the next three years – well above their peers still in hybrid or exploratory stages. This signals a clear shift: as digital transformation deepens, compute and storage requirements will outpace traditional IT cycles, pushing enterprises toward scalable, distributed infrastructure models.

Anticipated Investment Timeline to Enhance Organization's IT infrastructure (Percentage of respondents)



Source: Dun & Bradstreet Survey

Anticipated Growth in Organization's IT Infrastructure Capacity (Percentage of respondents)



Source: Dun & Bradstreet Survey

4. Heightened Focus on Resilience

In today's hyperconnected economy, IT resilience is no longer a technical concern - it's foundational to brand reputation, customer trust, and regulatory compliance. For modern organizations, the question is no longer whether infrastructure can scale, but whether it can withstand disruption.

Dun & Bradstreet's survey reveals that when businesses evaluate colocation partners, **resiliency and disaster recovery capabilities (89%), risk and security profile of the facility (89%),** and **redundancy across multiple sites (86%**) emerge as top priorities – on par with financial strength and scalability. In a world shaped by cyber risks, climate volatility, and geopolitical tension, **uptime is currency.**

This growing need for fault-tolerant infrastructure is expanding the role of professionally managed data centers - especially those offering **cloud interconnects (88%), low-latency performance (84%)**, and **high network carrier density (86%).** For industries where every millisecond counts, like financial services and e-commerce, resilient architecture is no longer a differentiator - it's a prerequisite.

Top Priorities When Evaluating Colocation Partners (Percentage of respondents rating 8 or above on a 10-point scale)

Source: Dun & Bradstreet Survey

5. Evolving Compliance Frameworks

In India, where regulations around data privacy, cross-border data flows, and sector-specific mandates are evolving rapidly, enterprises are rethinking how and where their data is stored and processed.

The implementation of the Digital Personal Data Protection Act marks a significant shift. It requires organizations to not only ensure lawful processing of personal data but also store and manage such data in ways that offer demonstrable accountability and traceability. Add to that the Reserve Bank of India's stringent local data storage norms for financial institutions and Securities and Exchange Board of India's growing emphasis on cyber resilience, and the compliance bar continues to rise.

This environment will continue to catalyze demand for data centers - especially those that offer clear data residency, third-party audit support, certifications (such as ISO 27001, PCI DSS, SOC 2), and robust internal governance structures.

6. Growing Emphasis on Sustainability

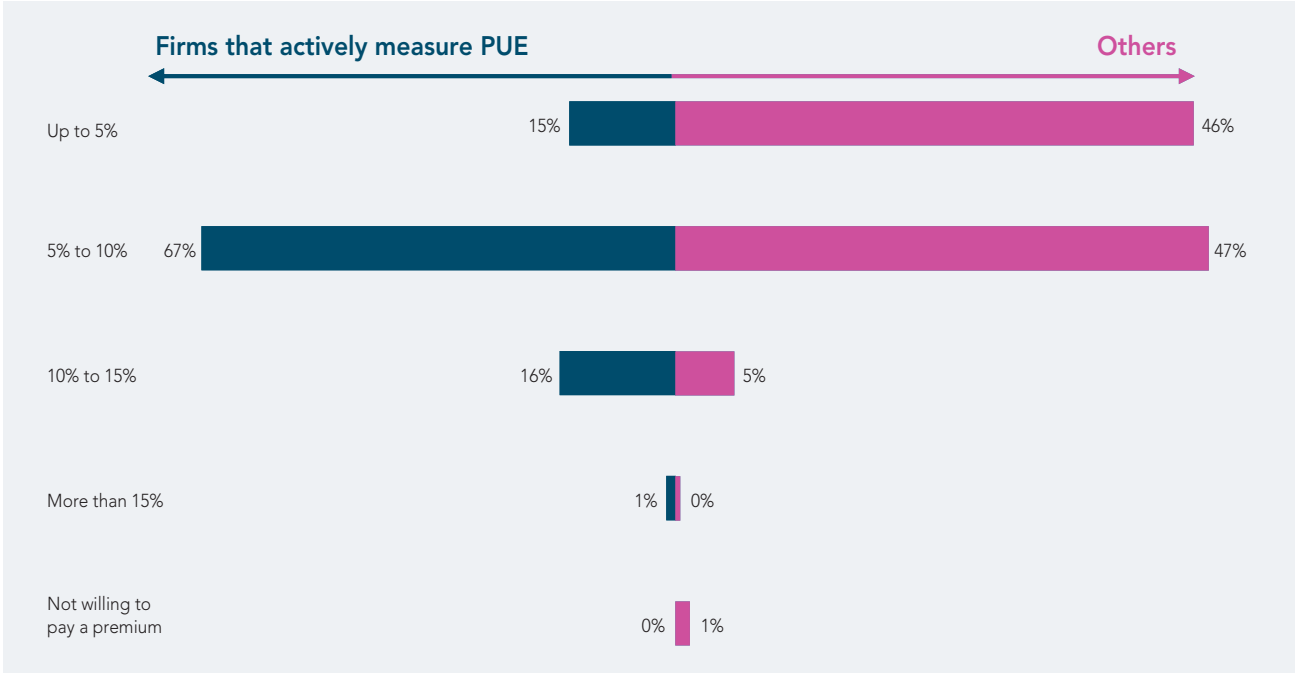
As stakeholder expectations rise, the environmental footprint of data infrastructure is facing greater scrutiny. Yet, Dun & Bradstreet's survey suggests that while sustainability is firmly on the agenda, it is still evolving into a decisive factor in infrastructure strategy.

81% of organizations cite **energy efficiency as a key criterion** when evaluating colocation partners - placing it on par with traditional performance metrics. However, only 67% prioritize access to green and renewable energy, suggesting that while operational efficiency is widely valued, sustainability commitments remain uneven.

This divide becomes even more apparent when we look at firms that **actively track Power Usage Effectiveness (PUE).** These organizations are significantly more inclined to pay a premium for green data centers. **67% of them are willing to pay 5-10% more** compared to just **47% among firms that do not track PUE**.

As ESG goals rise on corporate agendas, enterprises will increasingly turn to colocation providers that offer built-in energy efficiency and access to renewables - capabilities that are complex, capital-intensive, and often impractical to replicate in-house.

Willingness to Pay Premium for Adopting Green Data Centers (Percentage of respondents)



Source: Dun & Bradstreet Survey

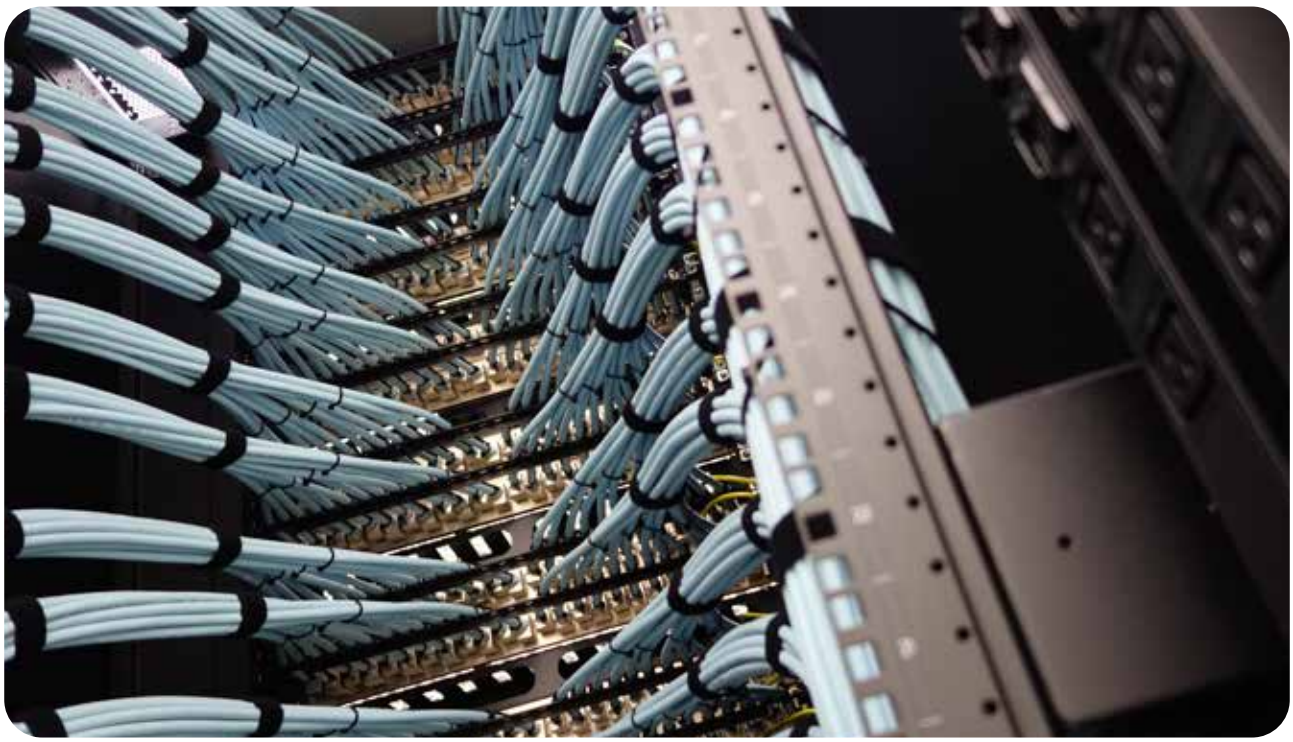
Annexure

Dun & Bradstreet conducted a nationwide survey of over 300 Indian organizations in April 2025 to uncover the key trends shaping data center demand. Using a stratified random sampling approach, the survey ensured broad representation across sectors and company sizes. Respondents included senior decision-makers - ranging from CIOs and IT heads to data infrastructure leads and business executives - providing strategic perspectives on data growth, infrastructure priorities, and cloud adoption. The firmographics of the respondents are as follows:

By Industry	Share of Respondents
Information and communication	24%
Financial and insurance activities	16%
Manufacturing	14%
Professional and administrative services	12%
Transportation and storage	7%
Real estate activities	7%
Wholesale and retail trade	6%
Utilities	5%
Accommodation and food service activities	3%
Construction	3%
Mining	3%

By Number of Employees	Share of Respondents
Less than 100	19%
100 to 250	27%
251 to 500	20%
501 to 1000	17%
More than 1000	18%

By Revenue	Share of Respondents
Up to ₹100 crores	40%
Between ₹100 to ₹500 crores	28%
Between ₹500 to ₹1,000 crores	12%
Between ₹1,000 to ₹2,500 crores	12%
Between ₹2,500 to ₹5,000 crores	6%
More than ₹5,000 crores	1%



Why SISL is Poised for Success

SISL stands out in India's rapidly expanding data center ecosystem due to its strong foundation in scalable, secure, and sustainable digital infrastructure. At a time when demand for high-density computing, AI workloads, and cloud-native operations is surging, SISL has positioned itself ahead of the curve with investments in AI-ready data centers.

Scalability

At the core of SISL's value proposition is its ability to deliver hyperscale-ready infrastructure. With 14 operational data centers and 188+ MW of IT power capacity, SISL has laid the groundwork for long-term growth.

Notably, it is the first data center operator in India to receive the NVIDIA DGX-Ready Data Center Certification for Liquid Cooling

underscoring its capability to support cutting-edge AI workloads. As digital transformation accelerates, SISL's ability to scale rapidly while upholding enterprise-grade standards makes it a trusted partner for future-ready businesses.

Rich Interconnect Ecosystem

A key pillar of SISL's infrastructure advantage lies in its sophisticated interconnect ecosystem, engineered to deliver ultra-low latency, high-availability connectivity across key metro regions. SISL's **Metro Cross-Connect** service links its data centers within the same city - such as the Airoli and Rabale campuses in Navi Mumbai - via pre-built, **high-bandwidth 1G/10G/100G Ethernet.** This fabric ensures **sub-50 millisecond latency** and built-in redundancy, creating a seamless foundation for data mobility, application continuity, and disaster recovery. Expansion of a similar solution to SISL facilities in Noida, Hyderabad, Bengaluru, and Chennai is already underway, reinforcing SISL's presence in every major economic corridor.

In addition, SISL offers **carrier-neutral Internet Exchange (IX) as a Service,** enabling customers to connect directly with **multiple global and domestic IX providers** - including AMS-IX, DE-CIX, Extreme-IX, SP-IXP, and NiXi. This results in optimized network performance, lower latency, and cost-efficient routing, especially critical for content-heavy, latency-sensitive workloads such as video, gaming, and AI model training.

Complementing this is SISL's **Data Center Interconnect (DCI)** service, which uses next-gen Ethernet VPN and Ethernet OAM protocols with automatic failover to deliver enterprise-grade resiliency and **near-100% uptime**. For customers with stringent disaster recovery or data replication needs, this creates a high-speed, high-availability architecture that supports continuous operations across multiple locations.

SISL's interconnect fabric combines performance, flexibility, and resilience - making it an ideal platform for businesses pursuing hybrid and multi-cloud strategies, latency-sensitive applications, or geographically distributed workloads.

Security and Operational Resilience

Security and operational resilience are also core to SISL's design philosophy. SISL's data centers are designed with a comprehensive **10-layer security architecture** which includes biometric access control, surveillance systems, and 24x7 on-ground security personnel, among other features. The facilities are K4-rated, offering reinforced protection against vehicular intrusion.

From a continuity standpoint, SISL's infrastructure includes redundant power feeds, dual utility grids, and N+N UPS systems, ensuring operational resilience under all conditions. The deployment of intelligent Building Management Systems and AI-driven monitoring further enhances fault detection, predictive maintenance, and system uptime.

Sustainability by Design

SISL has positioned sustainability as a core design principle rather than a compliance afterthought. The company has currently contracted over **306 MW of renewable energy,** enabling a significant portion of its data center load to be powered by solar and wind sources. For instance, its Rabale campus in Navi Mumbai draws 99 MW from renewable sources, making it one of the most energy-efficient hyperscale data center campuses in the region. This transition to green power is paired with high-efficiency electrical systems, precision air handling, and water-saving cooling technologies that collectively minimize the environmental footprint.

SISL is also committed to achieving carbon neutrality by 2030, a target that places it ahead of many peers. This ambition is underpinned by investments in energy monitoring, green building certifications, and low-PUE targets across its data centers. As digital infrastructure becomes an increasingly visible component of corporate emissions, SISL's renewable integration provides a crucial edge for enterprises aiming to decarbonize their digital operations.

Comprehensive Capabilities

The strength of SISL is further bolstered by its parent company, Sify Technologies. This backing brings in not only financial credibility but also access to a broader portfolio of enterprise services, from network management to cloud migration, giving SISL a strategic edge in delivering **end-to-end digital transformation solutions.**

With its hyperscale capacity, AI-ready architecture, integrated interconnectivity, and a clear roadmap for sustainable expansion, SISL is uniquely positioned to lead India's next chapter in digital infrastructure. Its platform strength offers enterprises not just capacity - but capability, resilience, and readiness for what comes next.

About Dun & Bradstreet:

Dun & Bradstreet, a leading global provider of business decisioning data and analytics, enables companies around the world to improve their business performance. Dun & Bradstreet's Data Cloud fuels solutions and delivers insights that empower customers to accelerate revenue, lower cost, mitigate risk and transform their businesses. Since 1841, companies of every size have relied on Dun & Bradstreet to help them manage risk and reveal opportunity.

Dun & Bradstreet Information Services India Private Limited is headquartered in Mumbai and provides clients with data-driven products and technology-drivenplatforms to help them take faster and more accurate decisions across finance, risk, compliance, information technology and marketing. Working towards Government of India's vision of creating an Atmanirbhar Bharat (Self-Reliant India) by supporting the Make in India initiative, Dun & Bradstreet India has a special focus on helping entrepreneurs enhance their visibility, increase their credibility, expand access to global markets, and identify potential customers & suppliers, while managing risk and opportunity.

India is also the home to Dun & Bradstreet Technology & Corporate Services LLP, which is the Global Capabilities Center (GCC) of Dun & Bradstreet supporting global technology delivery using cutting-edge technology. Located at Hyderabad, the GCC has a highly skilled workforce of over 500 employees, and focuses on enhanced productivity, economies of scale, consistent delivery processes and lower operating expenses.

Visit www.dnb.co.in for more information.

Disclaimer

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