CtrlS™

2025 COMPETITIVE STRATEGY LEADER

Transforming Innovation Into High-Growth Performance and Competitiveness

RECOGNIZED FOR BEST PRACTICES IN THE INDIAN DATA CENTER SERVICES INDUSTRY

FROST & SULLIVAN

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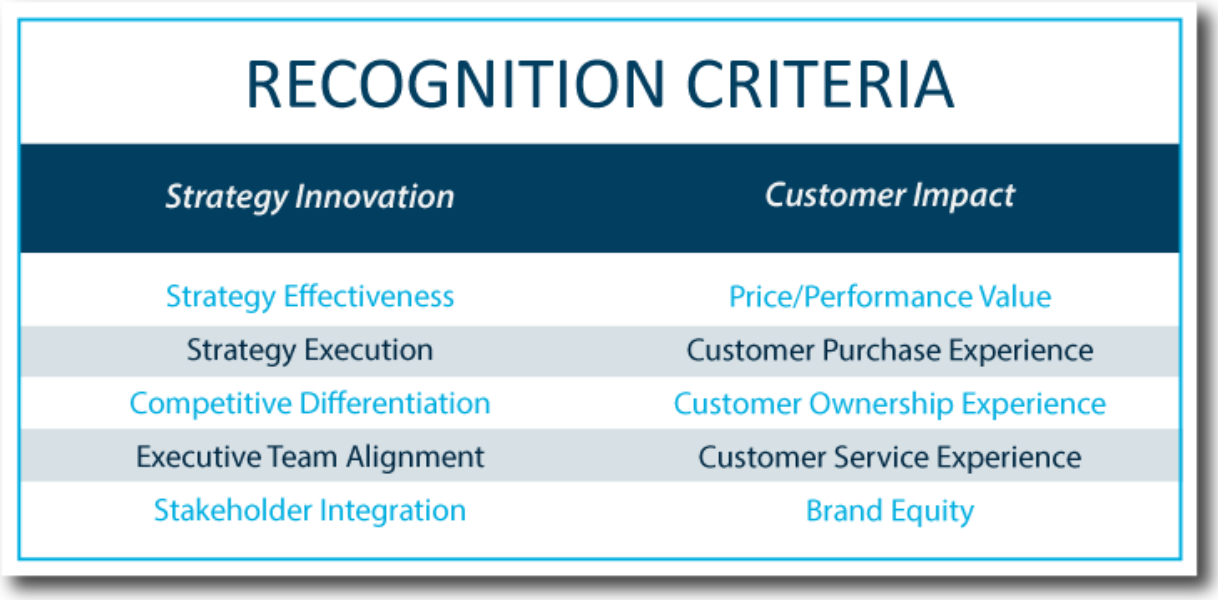
Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. CtrlS Datacenters excels in many of the criteria in the data center services space.



The Transformation of the India Data Center Services Industry

There is a growing adoption of artificial intelligence (AI), machine learning (ML), cloud computing, and large language model (LLM) capabilities driving data center demand in India. There is a significant increase in competition within India's data center service industry due to the growing demand for amplified information technology (IT) load capacity to enable these advanced technologies. Simultaneously, there is an amplified focus on sustainability, further challenging data centers to maintain high performance and reliability while minimizing environmental impact from reduced energy consumption, carbon emissions, and water usage.

Founded in 2007 and headquartered in Hyderabad, India, CtrlS Datacenters' (CtrlS) extensive value proposition lies in its ability to meet the diverse demands of the evolving Indian environment. The company supports its commitment to meeting various and ever-changing needs with a noteworthy focus on expansion. It is opening additional data center locations with varying capacity capabilities, including large campuses, mid-sized locations in large cities, and edge locations supporting increased AI workloads and reducing latency for edge cities. As a result, CtrlS demonstrates a strong competitive strategy, aligning with customers' changing needs and addressing the need for AI workloads as well as building edge data centers for AI inferencing.

CtrlS Datacenters' Value Proposition Sustained by Technology Leadership

CtrlS positions itself strategically to gain a competitive advantage in the colocation market through a comprehensive strategy emphasizing infrastructure quality, technological advancements, operational reliability, sustainability, and client-focused services. The company places quality and reliability at its core, operating Asia's largest Rated-4 data centers with an operational capacity of over 250-megawatt (MW) to offer high availability and reliability for crucial applications. CtrlS operates 15 data centers across eight key markets in India, including data center hubs such as Mumbai, Chennai and Hyderabad. In line with its commitment to quality, CtrlS claims industry-leading uptime service level agreements of 99.995% and power usage effectiveness (PUE) of 1.35 (design).[1] The company focuses on quality, reliability, and energy efficiency with an emphasis on technology innovation aligned with emerging demands, particularly from the increased use of cloud-computing services and AI technologies. As a result, CtrlS maintains an impressive growth plan, constructing hyperscale data centers leveraging advanced cooling technologies and high-density rack configurations to accommodate growing computing needs.

> *"CtrlS demonstrates a strong competitive strategy, aligning to customers' changing needs and addressing the need for AI workloads as well as building edge datacenters for AI inferencing."*
>
> ***- Nishchal Khorana***
> ***Associate Partner***

With the increasing reliance on cutting-edge solutions, CtrlS is creating next-generation data centers focused on meeting the needs of high-performance computing, AI, ML, and LLM workloads. Its facilities feature Rated-4 infrastructure, innovative direct liquid cooling solutions, and high-density power delivery, which manage the demanding thermal and power needs of contemporary AI systems without compromising reliability. The company prioritizes seamless connectivity for rapid, low-latency data transfer, crucial for large-scale AI training and inference. Designed with modular and scalable architecture, these advanced data centers ensure energy efficiency and significant PUE, meeting existing requirements and potential needs from future advancements in AI.

In addition to its commitment to quality and reliability, CtrlS recognizes the variable nature and needs of data center services and offers various colocation services, including solutions from dedicated server racks to customized data center buildings. This remarkable adaptability enables customers to create solutions that meet their unique requirements while ensuring cost-effectiveness and safeguarding high performance. The company also offers managed services, helping clients to reduce costs and maintain continuity through an on-demand service model.

Frost & Sullivan is impressed with CtrlS' extensive service offerings, providing clients with the flexibility to leverage colocation services that best align with their needs. Its various capacity loads, scalable architecture, and flexible service models showcase its commitment to empowering value across various applications and industry needs.

[1] Provided by CtrlS during interview.

Strategic Location Expansion Meeting Customers' Capacity and Regional Connectivity Needs

Combined with its large IT load capacity and widespread Indian geographic presence, CtrlS maintains ambitious growth plans, expanding its geographic locations and increasing its total workforce capacity. The company has a goal of achieving 1 gigawatt (GW) capacity to support the region's increased digital infrastructure and sustainability goals. Its recent location launches include:

Projects that went live:

- Patna DC 1:
  Patna Data Center, launched in 2024, expanded CtrlS' edge data center footprint by bringing enterprise-grade colocation and cloud services to underserved Tier 2 markets.
- Hyderabad DC 3:
  A greenfield Hyderabad Data Center was opened in late 2024 with a 13MW IT load catering to hyperscale cloud providers and large enterprises, becoming the third data center in the city and supporting Hyderabad's growing status as a technology center. The facility is built to withstand seismic activities and incorporates energy-efficient cooling and power systems, ensuring operational continuity, reliability, and sustainable operations.
- Chennai DC Campus:
  Chennai Data Center Park was opened in February 2025. This Rs 4,000-crore campus is AI-ready and features two hyperscale data centers with a combined IT load of 72 MW supported by a 120 MW substation. It is designed to support high-density graphic processing units of up to 70-kilowatts per rack, utilizing advanced liquid cooling technologies to maximize energy efficiency. These technologies include rear-door heat exchangers, immersion cooling, and direct-to-chip, which can eliminate up to 75% of the heat. It is built to withstand magnitude 7 earthquakes and is elevated 36 meters above sea level, ensuring zero flood risk, thereby mitigating potential impact from environmental events.

CtrlS is continuously adding locations with an impressive future expansion trajectory, further increasing IT load capacity and geographic span. The new projects announced focus significantly on AI and sustainability besides the unique cutting-edge data center features that CtrlS is known for.

Major greenfield projects announced recently include:

- Chandanvelly Data Center Park:

  The company recently announced plans for the Chandanvelly, Hyderabad Data Center Park, a 600 MW data center park featuring advanced cooling technologies designed to support ultra-high-density rack configurations, catering to the growing needs of AI and cloud computing sectors.

- DC Campus in Pharma City:

CtrlS plans to construct a 750 MW data center in Pharma City, Hyderabad that is run entirely on renewable energy, making it India's largest green data center and showcasing the company's commitment to sustainability and scalable infrastructure.

- Bhopal Edge Data Center:

CtrlS also announced plans in April 2025 for a Rs 500-crore Bhopal Data center to support high-performance cloud, AI, and digital services in central India.

Rapid Capacity Expansion:

In 2023, CtrlS announced a $2 billion investment over six years to expand operations, with the goal of adding 350 MW of AI- and cloud-ready hyperscale data center capacity.

In addition to significant capacity ramp up, CtrlS focuses on supporting pan-India needs with the goal of establishing over 20 edge data centers across Tier 2 and Tier 3 cities in India with state-of-the-art cooling, security, and power systems, ensuring reliable and secure deployment of AI workloads outside major metro regions. The company is expanding into GIFT City (Ahmedabad), Bhubaneswar, Guwahati, and several other Tier 2 and Tier 3 cities with edge facilities.

On the global expansion front, CtrlS is setting up its 150 MW hyperscale data center campus in Thailand, marking its first international location.

CtrlS demonstrates a significant commitment to the Indian market through its continuous expansion and investments in building data center facilities across multiple locations thereby strengthening its strategic positioning. This impressive location expansion roadmap showcases the company's understanding of the various needs (IT load capacity and geographic connectivity support), thereby underscoring its high brand reputation in India. Its first international location also marks a significant milestone, evidencing the region's recognition of its unique value proposition and expertise.

Impressive Partnerships

CtrlS' impressive growth plan and prominent capacity load are further fostered by its strategic partnerships and government collaborations, ensuring the company remains at the forefront of innovation tied to emerging needs and technology advancements.

Oracle Cloud:

In 2024, CtrlS formed a strategic partnership with Oracle, providing direct high-speed connectivity to over 150 cloud and AI services through Oracle Cloud Infrastructure and CloudConnect.

Telangana Government:

In 2025, the company signed a landmark memorandum of understanding with the Telangana government to develop a 400 MW capacity AI data center cluster. The campus incorporates cutting-edge cooling technologies and ultra-high-density rack setups specifically designed to address the requirements of AI and cloud computing companies. The project marks a significant boost to the state's digital economy, generating over 3,600 direct and indirect jobs and contributing to the state's incremental tax revenues.

ConnectiviTree:

In October 2024, CtrlS partnered with ConnectiviTree, a European telecommunications innovator, to deliver seamless, secure, and scalable data connectivity solutions for multinational enterprises.

Google Cloud:

In April 2025, the company achieved Google Verified Peering Provider status, enabling customers to establish direct, private connections to Google Cloud with reduced latency, improved network performance, and enhanced security for mission-critical workloads.

Genie Networks:

In June 2025, CtrlS partnered with Genie Networks to deploy Genie Analytics for traffic peering optimization. This collaboration provides CtrlS with end-to-end visibility and control over traffic flows for proactive capacity planning and improved network resilience, thereby improving throughput and minimizing latency.

This impressive span of partnerships with technology leaders underscores the company's competitive position, enabling it to offer advanced capabilities and enhance customer experience.

A Focus on Sustainability

CtrlS prioritizes sustainability as a foundational aspect of its operations, launching a series of initiatives that set the new standard for sustainability within the Indian data center sector. Moreover, as it works toward achieving its goal of net-zero carbon emissions by 2040 by implementing various eco-friendly initiatives, such as solar power projects and energy-efficient technologies, the company simultaneously supports the client's net-zero carbon emissions and sustainability goals. CtrlS has implemented numerous efficiency and environmental measures, including variable frequency drives, pilot projects for liquid cooling (which facilitate AI-based data centers), comprehensive water recycling efforts, and the elimination of single-use plastics across its campuses.

CtrlS' sustainability strategy focuses on adopting renewable energy resources. For example, it recently launched a GreenVolt 1 solar farm in Nagpur, Maharashtra, which provides 100 MW of captive solar energy. Its first phase (50 MW) became operational in June 2024, and the final phase is under development. The company is expanding this approach, aiming for over 1 GW of renewable energy capacity by 2030, powered by its additional projects in progress in Maharashtra, Uttar Pradesh, Tamil Nadu, and Karnataka.

Another notable achievement in sustainability is CtrlS' Mumbai and Chennai facilities. The facilities have been awarded LEED Platinum Certification (the highest global benchmark for environmentally responsible construction and operations), due to their sustainable infrastructure and innovative cooling and power systems designed to reduce environmental impact.

In addition to fully renewable energy-powered locations, the company also leverages renewable energy in existing locations when feasible. For example, its Noida data center utilizes solar power for 60% of its energy needs, aiming to generate 100 GWh over its lifetime to offset approximately 94,640 tons of carbon dioxide emissions.[2] This mixed energy approach underscores CtrlS' commitment to sustainability, as it looks to integrate renewable energy sources as much as possible without compromising technology quality or performance.

[2] Provided by CtrlS.

Conclusion

With the growing reliance on advanced technologies, such as artificial intelligence (AI), machine learning, cloud computing, and large language models, data center service providers face the challenge of delivering data centers that meet the increasing information technology load capacities while providing reliable and energy-efficient services. Through its strategic expansion efforts and focus on technology innovation bolstered by expansive partnerships, CtrlS Datacenters (CtrlS) differentiates itself in the competitive colocation market. The company's comprehensive strategy emphasizing technology advancement, infrastructure expansion, sustainability focus, and pan-India connectivity showcases its commitment to overcoming existing and emerging needs, positioning it as a key partner. CtrlS' extraordinary facility span includes cutting-edge, Rated-4 infrastructure with direct cooling and high-density power solutions that adeptly manage contemporary AI systems' demanding thermal and power needs. Its impressive growth plan, including multiple data center campuses and various edge locations supports country-wide connectivity aligned with increased capacity demands, while minimizing latency for connections with fifth-generation applications across Tier 2 and Tier 3 cities for enhanced user experience. Finally, the company places sustainability as a core focus, implementing various initiatives and renewable energy facilities, supporting its net-zero emission goals while empowering its clients to achieve their own sustainability goals.

With its strong overall performance, CtrlS Datacenters earns Frost & Sullivan's 2025 India Competitive Strategy Leadership Recognition in the data center services industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Competitive Strategy Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Strategy Innovation

Strategy Effectiveness: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

Strategy Execution: Company strategy utilizes best practices to support consistent and efficient processes

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Executive Team Alignment: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

Stakeholder Integration: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

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Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

Learn more.

Key Impacts:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)