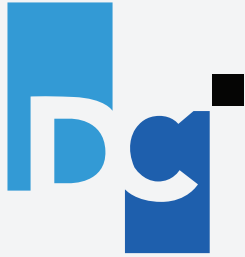# FROST & SULLIVAN

2022
COMPANY OF THE YEAR

INDONESIA
DATA CENTER SERVICES INDUSTRY

FROST & SULLIVAN

Best Practices Criteria for World-Class Performance

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

AWARD CRITERIA

Visionary Innovation & Performance	Customer Impact
Addressing Unmet Needs	Price/Performance Value
Visionary Scenarios Through Mega Trends	Customer Purchase Experience
Implementation of Best Practices	Customer Ownership Experience
Leadership Focus	Customer Service Experience
Financial Performance	Brand Equity

Transformative Mega Trends and Increased Digitization Drive Data Center Demand

Indonesia is a prominent data center colocation services market in Southeast Asia. A surge in cloud adoption services and hyperscale cloud providers that have launched or will launch their services in the country catalyzes Indonesia's hyperscale colocation demand. Frost & Sullivan expects the increased mobile data and internet uptake, escalating during the pandemic and driven by social media users, e-commerce adoption, and online gaming, to further play a role in Indonesia's growing demand for data center colocation services. With enterprises' increased spending on data-intensive technologies, favorable government policies toward digital technology adoption), and improvements in the country's connectivity and network infrastructure, Frost & Sullivan anticipates continued growth in the market. However, the market faces distinct restraints, such as intensified competition that drives service providers' need to differentiate, power and connectivity challenges, and the lack of skilled teams to lead data center operations effectively.[1]

Visionary Innovation and Customer Impact of DCI Indonesia

Founded in 2011 and headquartered in Jakarta, DCI Indonesia is a data center service provider that addresses the country's growing data center demand with continued investments in physical facilities and technology solutions. The company recently launched its fourth data center in Cibitung, a key

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[1] *Indonesian Data Center Colocation Services Growth Opportunities: Transformative Mega Trends and Increasing Digitization Initiatives Drive the Growth Pipeline of Data Center Colocation Services* (Frost & Sullivan, June 2021)

location for data centers in the country, to expand its power capacity. Its customer base includes global cloud service providers, e-commerce platforms, telecommunications service providers, and customers from various verticals (e.g., leading financial institutions). In 2021, Frost & Sullivan recognized DCI Indonesia for the second consecutive year as Company of the Year, calling attention to its holistic growth strategy that enables customer wins across cloud and hyperscale enterprise segments. It remains impressed with the company's continuing continued growth, innovation, and sustained leadership.

A Leader's Path

With its ongoing investment in critical information technology infrastructure, DCI Indonesia supports the country's digital economy and facilitates operational excellence to optimize efficiencies, increase customer value, and improve end-user interactions. It connects deep-seated domain knowledge with advanced capabilities to fulfill the growing demand requirements of hyperscale customers, providing scalability and best-in-class services.

> *"The company aligns well with customers' specific needs and develops tailored solutions with roadmaps for seamless execution. It leverages emerging technologies like AI capabilities and provides predictive maintenance for its electrical equipment to strengthen value. The implementation allows the operations team to predict electrical incidents before they happen, resulting in best-in-class services."*
>
> *- Riana Barnard,*
> *Best Practice Research Analyst*

DCI Indonesia's newest data center (JK5) at MM2100 Industrial Estate has a 15 megawatts (MW) comprehensive IT load capability. With units JK1, JK2, and JK3, it constitutes the largest data center campus in the country, developed on land owned by DCI Indonesia, and renders 37 MW total capacity. Furthermore, the company has strengthened its value proposition by opening an edge data center in Jakarta to increase its total capacity to 58 MW. The company also introduced its DCI platform, which enhances its core competency in managing data operations flawlessly across multiple locations from a centralized location. This task is achieved by implementing automation and standardized operational processes and procedures, providing stability across numerous sites. Moreover, it enables customers to experience an exceptional service-level agreement standard through a single point of contact while benefitting from redundant locations of data center facilities.

With a legacy of data center services leadership, the company's compelling value proposition underpins its sustained success. DCI Indonesia's focus on software-defined data centers has transformed its operational team, embracing automated systems through the adoption of artificial intelligence (AI), the Internet of Things, and predictive maintenance.

Roadmap to Success: Customer-centric, Continuous, Proactive

With its customer-centric corporate philosophy, DCI Indonesia operates on the central tenet that its success depends on customer satisfaction. This philosophy permeates the company's daily practices. Jakarta, the country's capital city, is home to a large enterprise customer base, and Java Island contributes to nearly 80% of the Indonesian data center services market revenue. For this reason, DCI

Indonesia launched its edge data center in central Jakarta. This 6 MW facility brings a strategic advantage, allowing DCI Indonesia to take the lead in a competitive data center services ecosystem. The edge data center addresses market demands requiring low latency connectivity and close proximity to the central population. Moreover, it aligns purposefully with the country's connectivity infrastructure development (i.e., submarine cable connectivity implementation) and the onset of the Internet Exchange and portal cross-connect. Also, DCI Indonesia lays the groundwork for supporting fifth-generation technology by securing low latency and fast and reliable connectivity.

> *"With its ongoing investment in critical information technology infrastructure, DCI Indonesia supports the country's digital economy and facilitates operational excellence to optimize efficiencies, increase customer value, and improve end-user interactions. It connects deep-seated domain knowledge with advanced capabilities to fulfill the growing demand requirements of hyperscale customers, providing scalability and best-in-class services."*
>
> *- Nishchal Khorana, Vice President and Global Program Leader, ICT*

The company aligns well with customers' specific needs and develops tailored solutions with roadmaps for seamless execution. It leverages emerging technologies like AI capabilities and predictive maintenance for its electrical equipment to strengthen value. The implementation allows the operations team to predict electrical incidents before they happen, resulting in best-in-class services. In addition, DCI Indonesia has successfully deployed an AI-driven system for its cooling infrastructure. It controls the cooling system to run without human intervention and enables auto-adjustment to eliminate hot spots and overcooled areas, improving energy efficiency and sustainability.

Frost & Sullivan lauds DCI Indonesia for enhancing customer value through its operational excellence, showing up in reduced human error, impeccable stability, advanced scalability, and long-term sustainability.

Positioned for Growth

Since its inception, DCI Indonesia's sterling reputation and customer-centric framework led to its coveted preferred partner status. Over the years, it added a range of new customers to its established base because of its exemplary reputation as a reliable data center provider in Indonesia.

Frost & Sullivan believes DCI Indonesia is well-positioned to drive the data center services space into its next growth phase, capturing market share and sustaining its leadership in the coming years.

Conclusion

With its ongoing investment in critical information technology infrastructure, DCI Indonesia provides data center capabilities and services to address the growing hyperscale colocation demand in the country. Overall, DCI Indonesia addresses this unmet need with a strong leadership focus that incorporates customer-centric strategies and exemplifies best practice implementation. It has the most significant data center campus and recently launched a 6 MW edge facility to increase its total capacity to 58 MW. In addition, a software-defined approach embraces automated systems (integrating emerging technologies such as AI and predictive maintenance features on its platform) to improve operational excellence, resulting in enhanced customer value through reduced human error, unprecedented stability, and increased scalability. DCI Indonesia remains a trusted partner, earning a reputation for offering the overall best in the data services market.

With its strong overall performance, DCI Indonesia earns Frost & Sullivan's 2022 Indonesia Company of the Year Award in the data center services industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year Award is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Award Analysis

For the Company of the Year Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or under-served needs are unearthed and addressed by a robust solution development process

Visionary Scenarios Through Mega Trends: Long-range, macro-level scenarios are incorporated into the innovation strategy through the use of Mega Trends, thereby enabling first-to-market solutions and new growth opportunities

Leadership Focus: Company focuses on building a leadership position in core markets and on creating stiff barriers to entry for new competitors

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate a consistent and repeatable level of success

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Impact

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers proudly own the company's product or service and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and high quality

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty

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About Frost & Sullivan

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 Engine™

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:

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