FROST & SULLIVAN

ST TELEMEDIA GLOBAL DATA CENTRE (INDIA) RECEIVES THE 2023
COMPANY OF THE YEAR AWARD

Identified as best in class in the Indian data center colocation services industry

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. STT GDC India excels in many of the criteria in the data center colocation 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

A Visionary Leader Empowering the Colocation Services Market

Founded in 2004, ST Telemedia Global Data Centers (India) (STT GDC India) is an industry-leading integrated data center solutions provider, empowering the country's burgeoning digital economy. It facilitates clients' digital strategies with unmatched offerings supported by its deep domain knowledge, advanced technological capabilities, and reliable, scalable, and secure infrastructure. Leveraging 19 years of expertise and commitment to innovation, the company maintains the largest pan-India footprint with a presence in 10 major cities across the country (i.e., Mumbai, Pune, Ahmedabad, Chennai, Bangalore, Hyderabad, Delhi, Noida, Jaipur and Kolkata), serving many fortune 500 companies

With its strong focus on environmental sustainability and world-class services (e.g., customer-centric solutions, industry-leading uptime, and state-of-the-art equipment), STT GDC India holds the coveted preferred partner status with customers across industries, including global hyperscalers and Fortune 500 companies. In 2022, Frost & Sullivan recognized STT GDC India (a majority-owned subsidiary of ST Telemedia Global Data Centers Singapore) for its cutting-edge innovation, eco-responsible and ethical business practices, customer-centricity, and notable commercial success, and remains impressed with the company's continuing innovation and sustained leadership.

Demonstrating Leadership through Strategic Expansion and Technological Innovation

STT GDC India strengthens its market leadership and value proposition through robust investments in its data center footprint expansion, technological advancement, and innovative solutions development. In

2022, the company reported double-digit growth in information technology load, bringing its total capacity to 250+ megawatts (MW), spanning 25 data centers (FY23). It aims to expand up to 550+ MW within four years with several new builds, including a campus in Greater Noida (100 MW), two data centers in Pune (40 MW), Navi Mumbai (80 MW), and Chennai (40 MW) respectively. As part of a broader deal with the Uttar Pradesh government (that includes expansion in Noida), the enterprise will establish its presence in a new city, Lucknow.[1] Moreover, in anticipation of increasing demand for edge data centers from hyperscalers and over-the-top companies in the coming years, the colocation services provider plans to grow its portfolio. The company intends to expand its edge data center footprint into five new cities, including Lucknow, Jaipur, Bhopal, and Cochin.

STT GDC India offers customers the most up-to-date and innovative solutions and services by leveraging cutting-edge technology. It integrates automation and new technologies into its construction and operational processes to optimize outcomes and improve delivery times. For example, the company employs building information modeling software in the design and building phases. The virtual three-dimensional modeling solution enables cross-functional collaboration, iterative development, and customer-centricity to optimize the building design, promote efficiency and error-free design, accelerate time-to-market, and exceed customer expectations.

STT GDC India has progressively integrated artificial intelligence (AI) technologies and High Performance Computing (HPC) innovation to enhance its data center solutions and services in recent years with parallel processing capabilities, accelerating outcomes and innovation. The specialised proficiency in high-density computing and liquid-cooled servers perfectly caters to high-power demands, bolstered by the partnership with HPC OEMs, propelling the concept of Sustainable AI Factories worldwide. The liquid-cooled GPU setups have been launched in Singapore and India, with plans for global expansion.

"As an industry pioneer instrumental in leading the country's data center market, STT GDC India follows best practices that enable it to provide exceptional solutions and services. The company's replicable, integrated project management framework that underpins its highly structured approach to data center development, helping it deliver best-in-class facilities on time."

- Rubini Kamal
Best Practices Research Analyst

As an industry pioneer instrumental in leading the country's data center market, STT GDC India follows best practices that enable it to provide exceptional solutions and services. The company's replicable, integrated project management framework underpins its highly structured approach to data center development, helping it deliver best-in-class facilities on time. It continues incorporating new best practices to enhance its operations and drive superior results. For example, the enterprise has started including its operations team throughout the entire data center development lifecycle, ensuring a smooth handover and faster time to market.

Roadmap to Success: Customer-centric, Continuous, Proactive

STT GDC India's services go beyond its extensive expertise and best-in-class capabilities, with customer

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[1] https://www.sttelemediagdc.com/in-en/newsroom/stt-gdc-india-signs-mou-government

value as a strategic imperative. Over the years, the company has earned a sterling reputation for helping its customers realize its digital strategies through an in-depth understanding of their unique needs. It offers customers comprehensive and highly flexible solutions ranging from customized racks to suites and build-to-suit buildings to powered shell models. As a testament to its industry-leading data centers, solutions, and services, in 2022, STT GDC India added over 45 customers to its portfolio. Notably, the company won two double-digit capacity orders from hyperscalers while its contracting capacity increased by 40% compared to the previous year. Moreover, its revenue grew by almost 26%, making way for robust expansion and continued growth.

With its customer-centric corporate philosophy, STT GDC India operates on the central tenet that its success depends on customer satisfaction. This philosophy permeates the company's regular practices and guides its cross-functional team (i.e., operations, customer experience management, and sales). Its customer experience management team fosters strong client relationships through regular communication, customer satisfaction evaluations, and proactively identifying their ever-evolving needs. Moreover, it leverages service desk solutions to streamline incident reporting and customer support processes, thus enhancing customer experiences and increasing issue resolution and service request efficiencies. For example, its self-service portal enables customers to independently report and track issues and service requests, enabling prompt ticket logging and faster resolution (compared to manual helpdesk support). With the convenience of the multi-channel platform (e.g., email, instant messaging, phone), customers have logged more than 80% of incidents through the self-service portal. As a result of its exceptional services, STT GDC India achieved a Net Promoter Score of 74 in 2023 (up from 72 in 2022).

> *"As a testament to its industry-leading data centers, solutions, and services, in 2022, STT GDC India added over 45 customers to its portfolio. Notably, the company won two double-digit capacity orders from hyperscalers while its contracting capacity increased by 40% compared to the previous year. Moreover, its revenue grew by almost 26%, making way for robust expansion and continued growth."*
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> *- Kapil Baghel*
> *Industry Analyst - ICT*

Building a Sustainable Future

STT GDC India is committed to establishing a long-term sustainable business by building and operating environmentally sustainable data centers, upholding social responsibility, and adhering to the principles of good governance. The company has attained 36% renewable energy usage and is on track to reach 60% of renewable energy usage by 2026 and to achieve carbon-neutral data centre operations by 2030. Besides designing and constructing Leadership in Energy and Environmental Design-certified data centers, the enterprise has signed several renewable energy power purchase agreements.[2] In addition to renewable energy, STT GDC India employs new technologies to optimize operational efficiency, significantly reducing its power usage effectiveness (PUE). The company achieves a 25% to 30% PUE reduction with technologies such as liquid immersion cooling. For instance, the typical design PUE of a hyperscale data center is around 1.45, while the design PUE of liquid immersion goes as low as 1.17. It also works with customers to increase ambient temperatures and humidity to reduce PUE (e.g., increasing

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[2] https://www.sttelemediagdc.com/in-en/newsroom/stt-gdc-india-partners-o2-power-supply-renewable-energy-data-centre-bengaluru

ambient temperature from 25 to 27 facilitates PUE reduction by 0.1). Moreover, the company continues to invest in high-efficiency equipment such as chillers and direct cooling systems to promote overall energy efficiency.

STT GDC India operates under a safety-first culture; it is ISO 45001 certified (the international standard for occupational health and safety), signifying its commitment to creating a safe and healthy work environment for employees and other stakeholders. It reported zero fatalities or serious injuries for two consecutive years. It continues to be committed to building an inclusive, equal-opportunity workplace, with a diversity mix in non-shift roles now at over 20%. The company also continues to invest extensively in its employees, as reflected in its Great Place to Work certification five times in a row, in recognition of its employee-centric policies, conducive environment, and continuous employee development.

Lastly, STT GDC India has increased its efforts on its corporate social responsibility initiatives, going beyond its target requirement. In 2022, the company has invested in empowering farmers through infrastructure improvement, technology, and resource access. It helped tribal villages in the Dahod district, Gujarat, to increase their annual household income through various initiatives like overcoming water shortages for their agricultural needs, which are rain-dependent by building wells and store water, installing solar pumps and providing access to high-quality seeds. Initially earning around INR40,000 to INR50,000, the enterprise helped the rural community increase their income to INR150,000 per annum.[3] Furthermore, it trained over 100 data center technicians in its Center of Excellence lab in Bangalore, increasing their earning capability by two to three times while promoting the data center ecosystem.[4]

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[3] https://ik.imagekit.io/n16yxpm26c/sttgdc/global_en/public/2023-07/STT_GDC_ESG_Report_2022.pdf
[4] Ibid

Conclusion

STT Telemedia Global Data Centers (India) is a visionary leader in the Indian data center colocation market. The company leverages state-of-the-art technologies, extensive domain knowledge, and industry best practices to provide customers with cost-effective, best-in-class solutions that promote the best outcomes and lower environmental impact. Through continuous investments in expanding to multiple locations, STT GDC India remains steadfast in its commitment to fostering strategic growth within the country and bolstering its capacity to meet ever-increasing demands. It significantly emphasizes new technologies, harnessing the power of artificial intelligence and liquid immersion cooling systems to boost its data centers' energy efficiency. Enhancing its value proposition, the company leverages cutting-edge technology to offer customers the most up-to-date and innovative solutions and services. Moreover, STT GDC India promotes outstanding customer value by working closely with them, understanding their needs, and implementing solutions that address their requirements. The company is committed to establishing a long-term sustainable business. It demonstrates a strong focus on environmental sustainability to future-proof its data centers through its steady transition to renewable energy and integrating state-of-the-art technologies to promote energy-efficient data centers. Overall, the company's consistent focus on expansion, improving operational efficiency, and sustainability in delivering data center services reinforces its strong value proposition in the market. With its strong overall performance, STT GDC India earns Frost & Sullivan's 2023 Indian Company of the Year Award in the data center colocation 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

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)