FROST & SULLIVAN

trueIDC

2022
COMPANY
OF THE
YEAR

THAILAND
DATA CENTER 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. True IDC 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

Hyperscale and Retail Segments Drive Data Center Colocation Service Demand in Thailand

The data center colocation services market in Thailand continues to expand. Hyperscale cloud vendors, content and digital media, and enterprise segments (e.g., banking, financial services, and insurance) are the primary growth drivers. Underpinning the expansion are migrating hyperscale cloud providers and over-the-top/communication service providers, along with increased information technology spending by local enterprises looking to develop their digital infrastructure.

Government initiatives to promote technology, creativity, and innovation (such as Thailand 4.0 and Digital Transformation projects) on top of enterprise investments in digital technologies adoption during the pandemic will further accelerate data center colocation services demand. Notwithstanding the high growth potential, the market also faces particular restraints, such as fierce competition driving the need to differentiate and the lack of a skilled workforce to lead data center operations effectively.

Frost & Sullivan analysts anticipate that third-party data center expansions, enhancing service provider capabilities, and focusing on best practices will enable greater outsourcing of digital infrastructure services to third-party colocation services providers. Notably, forward-looking data center service providers focus on sustainability through improved energy efficiency in data center design and operations.

Visionary Innovation and Customer Impact of True IDC

True Internet Data Center (True IDC), a leading data center and cloud service provider in Thailand, offers end-to-end digital infrastructure. Highlights include its formidable channel partnership program (i.e., working with best-in-class partners ranging from Amazon Web Services, Avaya, CISCO, Google, Huawei, Microsoft, Tencent, Vmware, and ZTE), industry-leading certifications, software-defined network promoting an exceptional service-level agreement standard (99.999%), and a customer portal which extends top-tier cloud billing and advisory services.

Investments in Infrastructure Expansion Fuel Above-industry Revenue Growth

Bangkok is a key focus area for data center service providers. True IDC's portfolio comprises four centers (strategically located in North Muangthong, midtown Ratchada, midtown Pattanaka, and East Bangna), strengthening its domestic reach. Its fifth facility (established in 2015) in Yangon, Myanmar, provides services beyond the borders of Thailand. Leveraging a one-stop-shop approach, the company continues to expand and enhance its data center and cloud services offering.

Frost & Sullivan considers Bangna an alternative to Bangkok, primarily due to its economical land cost, infrastructure, and network connectivity that supports high-scale data operations. For this reason, True IDC is now developing an East Bangna campus. This data center hub will comprise four buildings at a total investment cost of approximately $91.5 million when completed. The first phase, built on eight acres of land, was launched in 2019. The second Uptime-certified building on the campus will be operational in 2022. It supplies up to 12 kiloWatts per rack and includes remote hands, rack cabinets, office space, cages, and individual server hosting. Moreover, True IDC has expansion plans at its Myanmar data center in Yangon. The company also targets Vietnam, Malaysia, and Cambodia for future expansion. True IDC has already contracted a team to acquire land for its development plans in Vietnam and appointed a general manager to start a similar process in Cambodia. Notably, the company achieved above-industry revenue growth in 2021.

> *"True IDC achieved strategic customer wins due to its continued expansion to address demand, its value proposition for integrated offerings, and its focus on operational excellence and innovation."*
>
> **- Nishchal Khorana,**
> **Vice President & Global Program Leader**

Technology and Innovation Capacity Acceleration Lead to Strategic Customer Wins

True IDC goes beyond its extensive expertise and best-in-class capabilities, with customer value as a strategic imperative. The company's premium colocation offerings are critical in meeting the growing business demand of medium to large enterprises and government agencies. By launching its Regional Command Center, True IDC brought its five data centers' control, operation, and surveillance features under one roof. Its software-defined network guarantees service continuity and maximizes availability by eliminating boundaries between data centers, enabling seamless resources sharing, and reducing latency. As a result, this capability could lead to cost savings of up to 80%.

True IDC works closely with customers throughout the entire purchase process to assess their specific needs and develop tailored solutions with roadmaps for seamless execution. As hyperscalers have specific requirements, True IDC offers a build-to-suit service, allowing customers to devise their

equipment arrangement and energy consumption. Also, the company takes the lead with internationally recognized certifications, such as ISO/IEC 20000-1, ISO/IEC 27001, ISO 22301, ISO 50001, CSA STAR Cloud Security, and Payment Card Industry Data Security Standard approval, allowing customers to run their businesses at ease. This foundational approach establishes ongoing trust with customers for long-lasting relationships extending throughout the service lifecycle.

In addition, True IDC introduced specific initiatives in 2021 to enhance the customer experience value chain:

- An environmental-friendly operation system turns True IDC's facilities into sustainable green data centers. Specifically, by deploying solar energy installations at its East Bangna campus, the company supports long-term sustainability by aligning its operations with environmental protection and carbon dioxide emissions reduction, purposefully promoting the uptake of renewable energy sources.

- To reinforce transparency and reliability in its relationships with global customers (i.e., enterprises and hyperscalers), True IDC performed a SOC2 type 2 assessment to capture how well it safeguards customer data and addresses risks. This report addresses five domains (i.e., security, availability, confidentiality, processing integrity, and privacy) relevant to organizations processing or storing client information in the cloud, such as data centers and cloud service providers.

- Intelligent artificial intelligence (AI) and machine learning (ML) tools, integrated with its proprietary management system, enhance facility efficiency by adding predictive capabilities. ML equips data center environments, promoting efficiency in power utilization, while AI helps reduce manual inspection and propels proactive, preventative maintenance.

- By implementing a portal to support a seamless customer experience, True IDC allows customers to place, monitor, and track requests for additional services and changes. Specific teams within the customer service department categorize and handle these requests.

- Lastly, all customers (i.e., business-to-business clients and the general public) can now experience the company's technology backbone at its interactive data and cloud experience data center.

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>
> **- Riana Barnard,**
> **Best Practices Research Analyst**

True IDC achieved strategic customer wins due to its continued expansion to address demand, its value proposition for integrated offerings, and its focus on operational excellence and innovation. It includes a global search engine company, e-commerce platform clients, cable companies, enterprise customers in the retail segment, and one-year upfront contracts with hyperscalers from China. Frost & Sullivan acknowledges True IDC's ability to develop solutions that respond to clients' needs, cementing its position as a leader in Thailand's data center service segment. Moreover, the company's impressive growth momentum and trajectory are a testament to its leadership, earning its clients greater value and enabling it to capture market share.

Conclusion

As Thailand's data center services market continues to expand, third-party data center expansions, enhancing service provider capabilities, and focusing on best practices are the critical success factors in gaining market share. True IDC excels with its strong leadership focus that incorporates customer-centric strategies and exemplifies best practices implementation. The company leverages a one-stop-shop approach to expand and enhance its data center and cloud services offering by adding advanced artificial intelligence and machine learning tools to its management system, improving efficiencies, and promoting preventative maintenance. Other highlights include its channel partnership program that supports a best-in-class cloud services ecosystem, industry-leading certifications, a user-friendly customer portal, and its commitment to long-term sustainability. The company remains a trusted partner, earning a reputation for offering the overall best in the data center services industry.

With its strong overall performance, True IDC earns Frost & Sullivan's 2022 Thailand 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

About Frost & Sullivan

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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)