

Global Presence, Local Expertise.

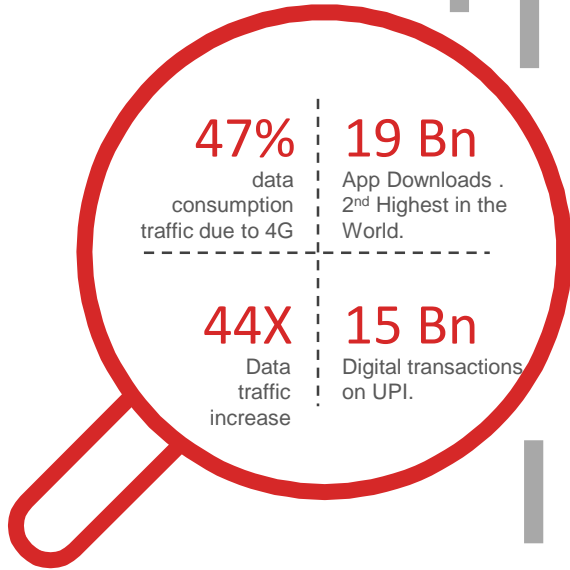
Zainab Lakdawalla
Director Sales



Agenda

- 1 About STT GDC
- 2 STT GDC India
- 3 Global Data Centre Platform
- 4 Our Unique Features
- 5 Service Portfolio
- 6 Operational Excellence
- 7 Industry Recognition

RIDING THE DIGITAL WAVE



Consumer Related

- **>600 M** Internet Users
- **>500 M** smartphone users
- **400 M** Social media users
- **120-150 M** online shoppers
- **300 M** online gamers
- **19 Bn** App Downloads ; 2nd highest in the world
- **12 GB** Data Consumption/Mo/user – amongst the highest in the world; lowest price per GB
- **\$1 trillion** digital transactions by **2025**



E-Governance Related

- Aadhar enrollment: **1.25 Bn**
- eKYC : **~8 Bn** transactions
- **34 M** Digilocker users; **3.8 Bn** issued documents
- **381 M** Jandhan accounts



Start-ups

- **~9,500** tech led start-ups in India. **2-3** born everyday
- **\$100 Bn** value of tech start-ups in India
- **\$15 Bn** funds raised in 2019
- To grow to **\$400 Bn** in 5 years



Industry & New Tech

- Est **\$250-300 Bn** size of the digital economy
- **\$8 Bn** best value of IoT industry; **\$18 Bn** by FY26
- **\$200 M** size of AI industry; **\$550 M** by FY26



Edge DC & Device Momentum

- **30% to 70%** increase in Internet coverage by 2026
- **50%** traffic (video & ecommerce) from Tier 2/3 cities
- **Cloud** and **IoT** spread beyond Tier 1 cities

NEW OPPORTUNITIES OPEN IN THE INDIA MARKET



Video Conferencing

- **30X** usage growth for Google Meet
- **22%** of MS Team meetings use Video
- **30X** growth in Zoom meeting daily participants



Remote Working

- **41%** organisations have not initiated secure access
- **50%** organisations cite a need for proper infrastructure
- **84%** organisations that may continue to offer remote work capabilities



E-commerce

- **220 million** Online shoppers in India by 2025
- **1200%** Growth of e-commerce in India by **2026**



Policy Enablement

- National Digital Communications Policy, 2018
- Vision 2021 of Reserve Bank of India
- Personal Data Protection Bill, 2019
- MeitY's Vision of \$1 Trillion Digital Economy by 2025



Future Tech

- **33.5%** CAGR growth in Big Data till FY25
- **31.3%** Rise in demand for cobots



Digital Payments

- **>26%** in **FY22**--Growth of Digital Payments due to preference for paperless and contactless
- **190** million monthly UPI transactions
- **360** million e-commerce users in India
- **736** million Aadhar linked bank accounts

TRENDS REDEFINING THE IMPORTANCE OF DATA CENTRES

Several shifts are set to define the future of Data Centres

Demand to move from captive to colocation and IaaS-based offerings

- **21%** of overall Data Centre outsourcing market ~ **US\$ 0.5 BN**
- **22%** - Expected colocation revenues growth at a CAGR over the FY19-26 period
- **~ 490 MW**- Projection of operational capacity to be added over the next **3-4 years**

Shift to newer, more efficient technologies

- **20%** - Data centre hardware switches will be procured via an as-a-service model by 2025
- Automation in DC management has increased with Cloud, AI and VR technologies
- Data centre owners are increasingly using micro data centres in their infrastructure
- Environmentally friendly technologies has also grown manifold

Players moving to lower rung cities owing to

- Space constraints
- High rental costs in top **4 cities**
- Large international players acquiring local players to foray into India

ICT companies are major investors in renewable energy

Top four off-takers of renewables in 2019 are:

- Google
- Facebook
- Amazon
- Microsoft

COLOCATION BENEFITS



Flexibility and scalability



Lower Opex and Capex



Better disaster recovery capabilities



Lower cooling and power costs, guaranteed SLA and uptime



High-end physical security features



Adherence to international compliances, standards and certifications and sustainability practices



Higher PUE on account of design and infrastructure

WHERE DOES INDIA STAND VS THE WORLD?

India's share at **~2%** of World, projected to double in **18 months**.
>\$4.5 BN – Indian DC Market Size between 2020-2025

India at **~250 MW** designed capacity today, will reach **~500MW** in **18 months** and **1000MW+** in **4 years**.
USA added **~500 MW** last year.

India **2nd largest** DC market in APAC. China growing at 4x-5x vs India.

World colocation growing at **~12% CAGR**, India at **23% CAGR**.



Growth Drivers of DCs



Growth in e-commerce:
220 MN online shoppers in India



Rise of future tech:
31.3% rise in demand for cobots



Increase use of social media: **400 MN** Social Media Users



Greater preference for OTT platforms: **50% traffic** (video and ecommerce) from Tier 2 and 3 cities



Rapid digitalization of services across industries: **64%** organizations in India need cloud computing

ST TELEMEDIA GLOBAL DATA CENTRES

Headquartered in Singapore, wholly owned by ST Telemedia, a direct, wholly-owned subsidiary of Temasek.



STT GDC is an integrated global platform of carrier-neutral and advanced data centres across developed and emerging markets.

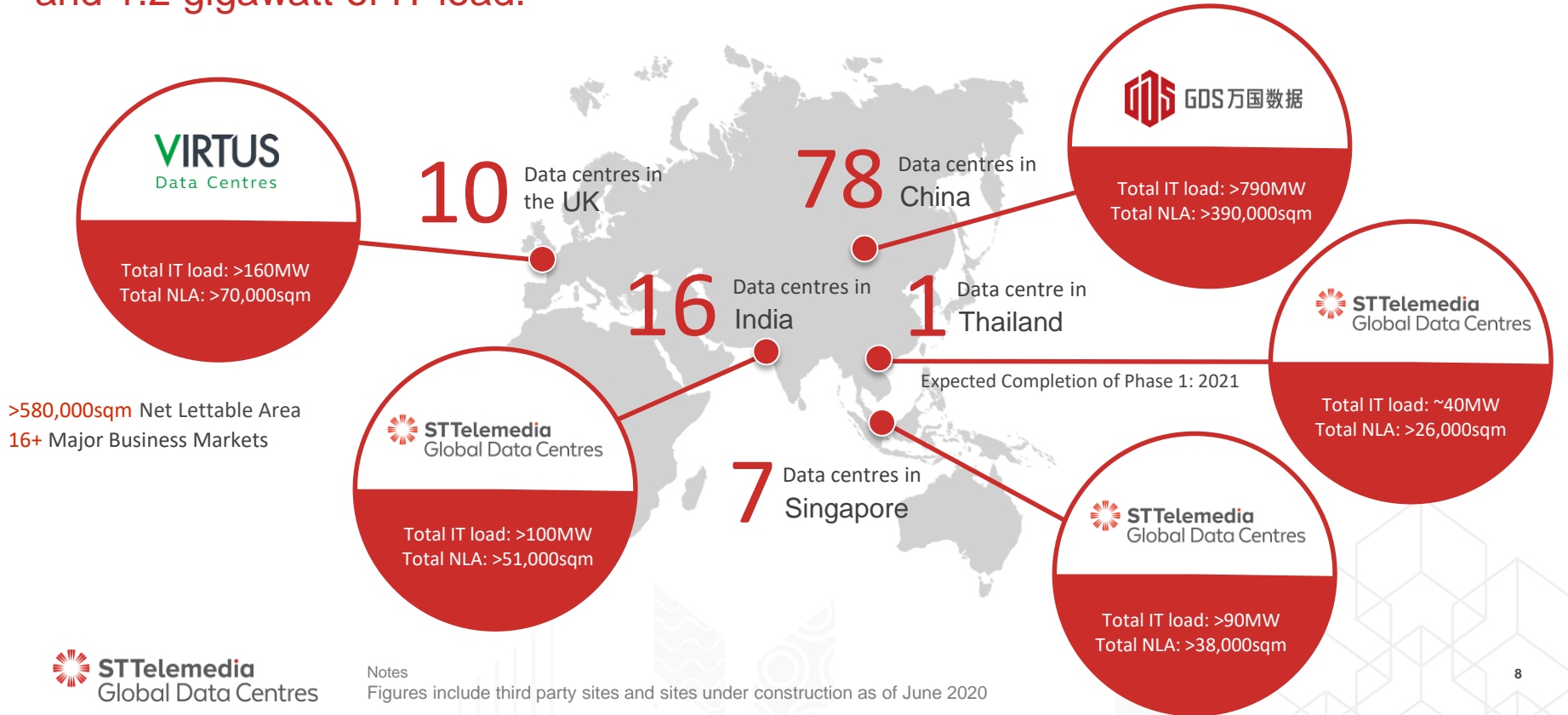
Since establishment, the STT GDC platform has expanded rapidly to build significant presence in major economic markets.

Currently, STT GDC actively manages a portfolio of **over 110¹ data centres** with an aggregate **IT load of 1.2 gigawatt** and **net floor area of >580,000 sqm** across Singapore, India, the United Kingdom, Thailand and China.

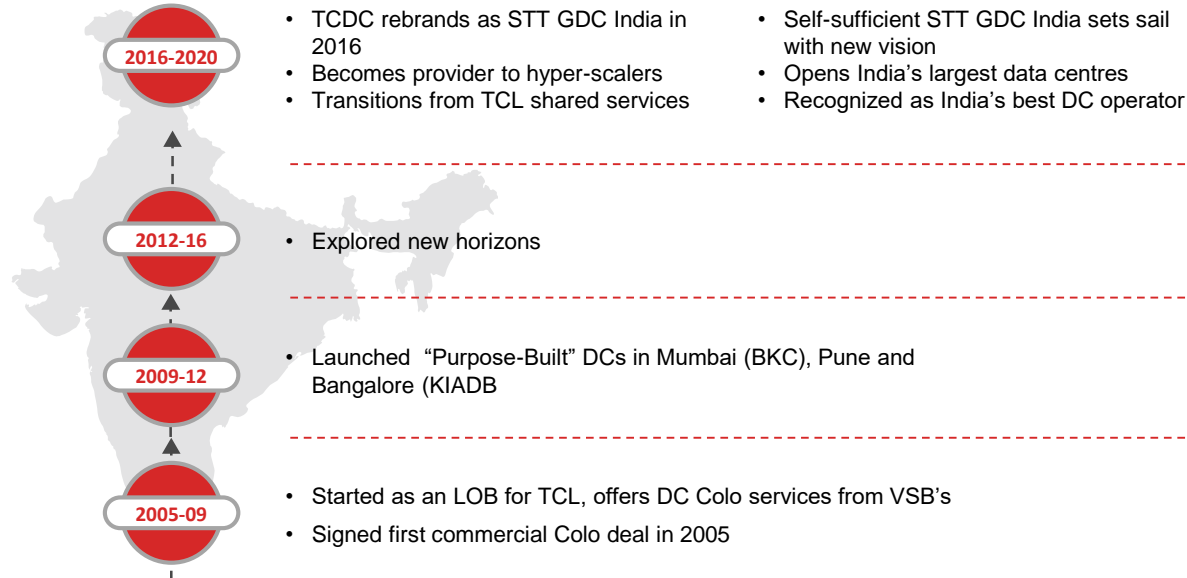
¹Including third party sites and sites under construction as of June 2020

ST TELEMEDIA GLOBAL DATA CENTRES

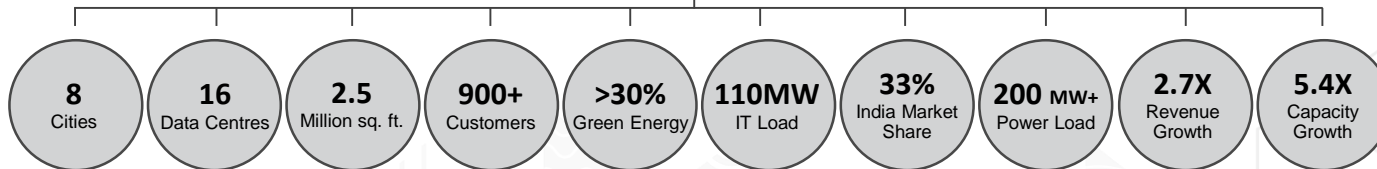
Our global platform spans 5 geographies comprising more than 110¹ data centres and 1.2 gigawatt of IT load.



STT GDC INDIA-OUR GROWTH STORY



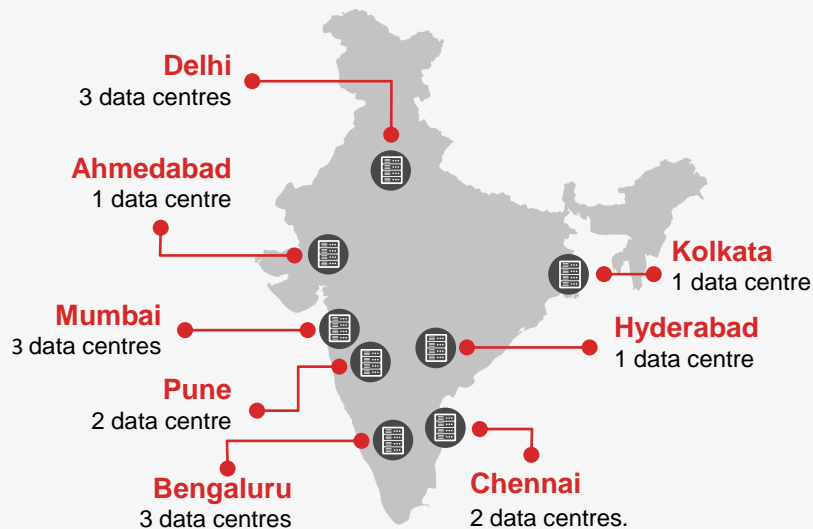
Key Achievements



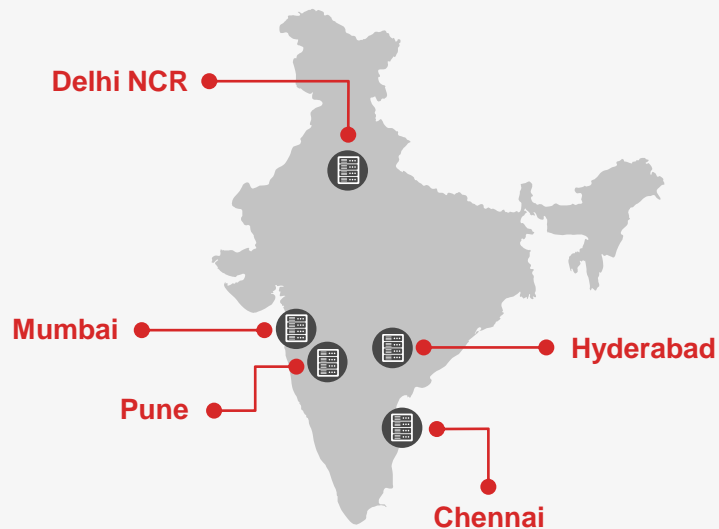
HOW IS STT GDC INDIA RIDING THE GROWTH WAVE ?

Operating since 2004 in India, 33% market share in India colocation market. 16 DCs live in 8 cities, 105 MW IT load projected to double in 3 years.

16 Existing DCs with 105 MW IT load



Upcoming DCs, total 2x of current IT load



* 135 MW included under construction facilities

OUR UNIQUE FEATURES

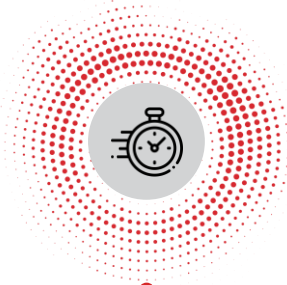
Most Credible Colocation Provider with Least Risk



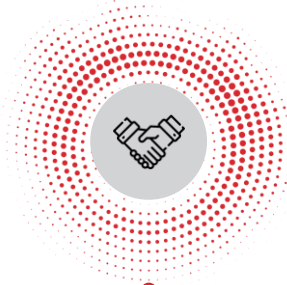
Financially stable
strong reputation
and brand



No tenancy risk
Land parcels, large
capacities on short notice



Proven delivery track record
always On
Time delivery



Closest to customers
multi-city presence in India
and overseas



Network rich & carrier neutral
all DC Campus are also
PoPs

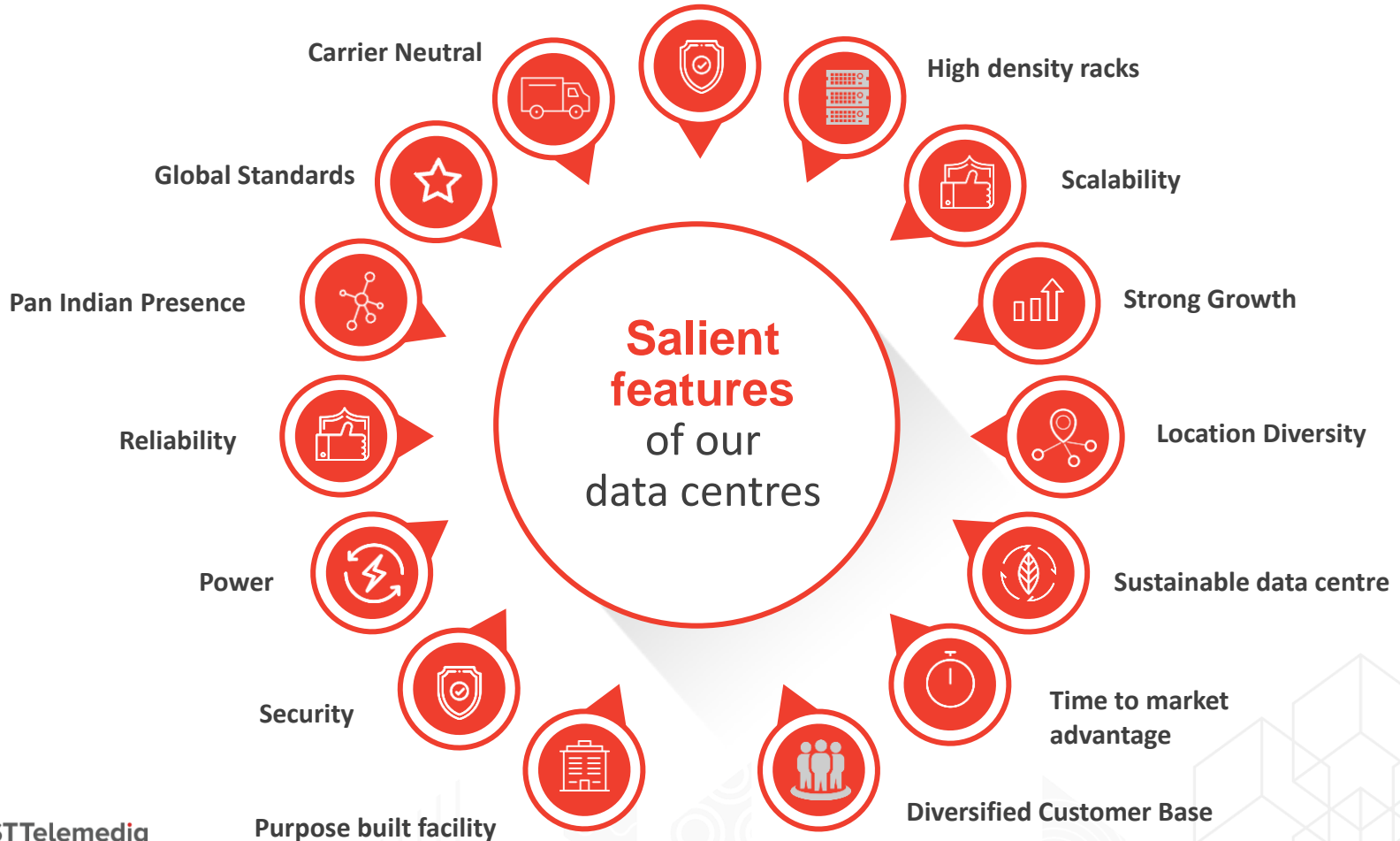


Design Excellence
strategic locations, high
voltage tap, enterprise grade



Operations excellence
decades of experience, low
maintenance window

High Quality Portfolio



SECURITY BUILT INTO EVERY LAYER

Highly secure data centres for our customers' mission-critical data



OPERATIONAL EXCELLENCE

- Built and managed to top standards of the industry
- Accredited and compliant to relevant security, risk, regulatory and audit requirements



HARDENED PERIMETER

- Anti-crash barriers (vehicular)
- Turnstile access (personnel)
- Anti-crash and anti-climb boundary walls with perimeter protection against vehicle-borne improvised explosive device (VBIED)



24x7 SECURITY MONITORING

- 24x7 Technical Assistance Centre teams and on-site manned guards
- 24x7 video surveillance and intrusion detection
- 24x7 CCTV recording at 1080p resolution, fixed with pan-tilt-zoom (PTZ) video analytics
- Personnel verification upon entry



STRINGENT SECURITY ACCESS

- 24x7 controlled site access with 2-factor authentication by pre-authorization to only authorized floors and data centre halls
- Biometric, contactless card access system with RFID real-time movement tracking within building and biometric access control system
- Mantrap



INDIVIDUAL RACK ACCESS

- Mechanical lockset with unique keys
- Keycard-based centralized locking

OPERATIONAL EXCELLENCE

Consistent quality across our global portfolio



Strong global-local leadership

- Enabling market entry for our customers across our global platform
- Global strength matched by our local expertise, with accredited and qualified teams on the ground who know their home markets best



Built and operated to global standards of excellence

- Centre of Operational Excellence department to adopt best practices and communication across STT GDC platform



TIA-942

SS 564

SSAE18

..and more



State-of-the-art, new data centres

- Purpose-built data centre designed to the highest technical specifications
- Modular approach providing customer expansion options in future



Reliability

- Robust systems and procedures in place to manage change control and incidents
- High power availability for customers' mission-critical data, providing peace of mind and reliability they need



Wide range of connectivity options

- Carrier-neutral
- Interconnection and peering fabrics
- Ready connectivity via both local and global network service providers
- Direct connectivity to Cloud Service Providers



Physical security

- Multi-layer security at all sites
- On-site security personnel
- Enhanced security measures *e.g. intrusion detection, physical access controls, 24x7 CCTV monitoring*

OUR EXCELLENCE, PERFORMANCE & DEDICATION IS AWARDED

FROST & SULLIVAN

Colocation Service Provider
of the Year award 2020



Great Place to Work
Certification 2020-21



ET Iconic Brand 2020



Confederation of Indian Industry

"Best Debut Team" Northern Region Inter
Industry Competition on Environment, Health
and Safety Management, 2020



Most Trusted Data Centre
Services Provider of the Year



Most Promising
Business Leader of Asia



Cooling (Energy Efficient Management)
Green DC Initiatives (Environmental)



IGBC Performance Challenge for
Green Buildings - Excellence Award



CEO with
HR Orientation

FROST & SULLIVAN

Colocation Service
Provider of the Year 2019



Data Centre
Company of the Year



Energy Smart Award



North India Best
Employer Award



Best Employee
Engagement Practices

FROST & SULLIVAN

Colocation Service
Provider of the Year 2018



Design Management Award
Green DC Initiatives Award



Design Management Award
Green DC Initiatives Award



CEO of the Year 2018
For Excellence in IT



Data Centre Operations
Team of the Year 2018

FROST & SULLIVAN

Best Practices Award 2017





Thank You