IDC MarketScape

IDC MarketScape: Asia/Pacific Datacenter Operations and Management 2023 Vendor Assessment

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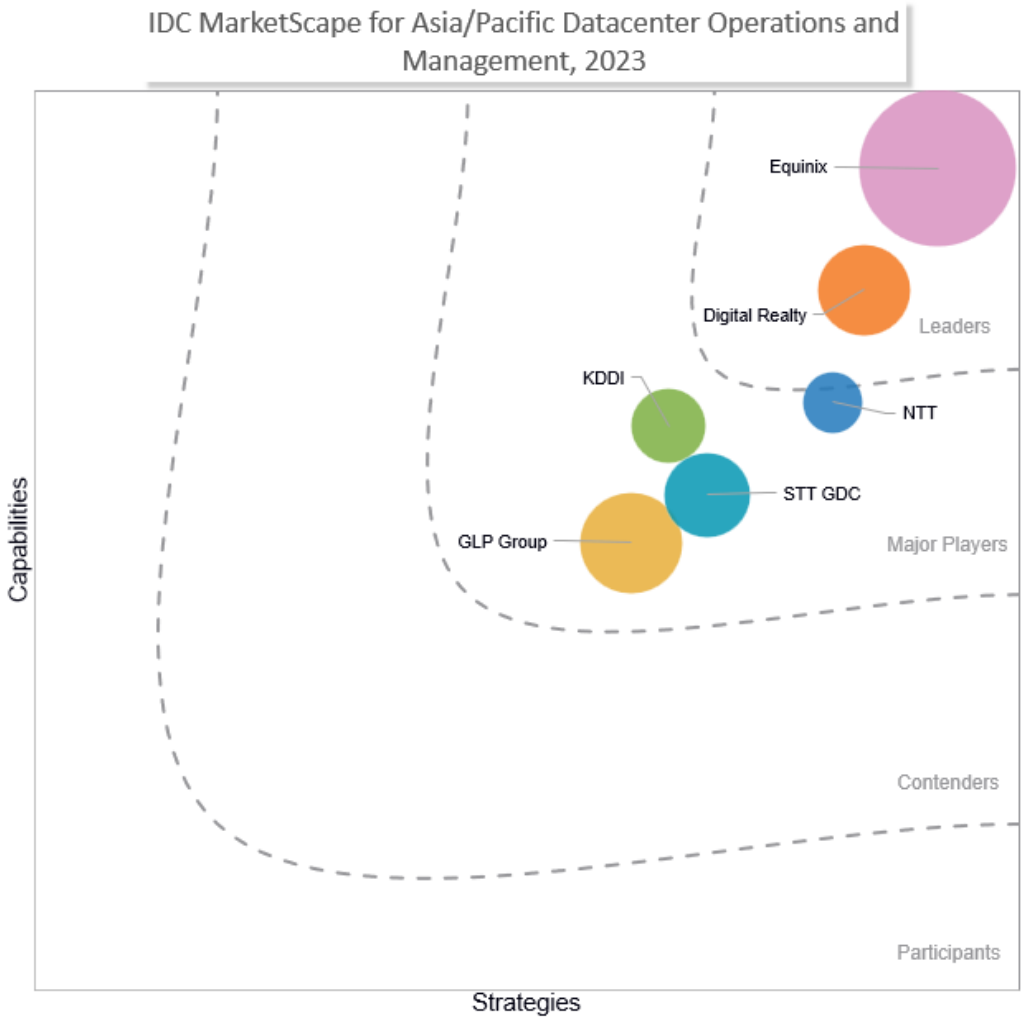
THIS MARKETSCAPE EXCERPT FEATURES: STT GDC

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape for Asia/Pacific Datacenter Operations and Management 2023 Vendor Assessment



Source: IDC, 2023

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

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IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Asia/Pacific Datacenter Operations and Management 2023 Vendor Assessment (Doc #AP50445823e). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Advice for Technology Buyers, Featured Vendor Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Datacenters are playing an increasingly important role as the infrastructure backbone of the digital economy, serving as central hubs for cloud computing, connectivity, and application deployment. They are vital infrastructure components that provide strong connectivity to captive, hosted, and cloud environments. Third-party datacenters are becoming increasingly important in the hybrid multicloud ecosystem, resembling hyperscale cloud service providers (CSPs). Both enterprises and hyperscale organizations recognize the significance of having continuously available and compliant infrastructure. Business leaders prioritize business resilience, with a specific emphasis on integrating business continuity and disaster recovery (BCDR) as essential aspects of their resilience strategies.

As more people in the Asia/Pacific region are consuming a variety of digital services, from streaming to virtual banking, it has caused many enterprises in Asia/Pacific to reconsider their digital infrastructure strategy. Although most digital transformation (DX) efforts in the datacenter industry were accelerated during the COVID-19 pandemic, this only laid the groundwork for what is yet to come, with the mainstream AI and ML adoption causing disruption at the core of computing. Because of recent advancements, executives are being compelled to reevaluate their strategies and find a balance in utilizing hosting services. Organizations are increasingly demanding datacenter services to secure high-quality, resilient, and secure infrastructure for their digital initiatives.

On the flip side, when observing the Asia/Pacific datacenter infrastructure supply trends, this market is growing rapidly, particularly at hyperscale. There is growth in both emerging and mature markets, with the expansion of cloud regions from hyperscalers, such as Amazon Web Services (AWS), Microsoft Azure, Google Cloud Platform (GCP), Alibaba Cloud, Huawei, and Tencent Cloud, seeking to grow their regional footprint. Subsequently, a new wave of datacenter SPs, such as AirTrunk, NeutraDC, and YTL, in addition to major real estate, private equity, and asset managers are tapping into the lucrative datacenter market, aiming to fill the demand shortages for colocation and other datacenter-related services at hyperscale size and deployment. As a result, there has been a recent uptake in mega-datacenter projects in Asia/Pacific.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

To gain insights into the competitive landscape of prominent datacenter SPs in the Asia/Pacific region, it was essential to assess their capabilities to cater to the organizations' requirements across various sizes and levels of prominence. To achieve this, a vendor inclusion criterion was established to define the parameters of the study. All vendors had to meet six specific criteria to be eligible for participation in the IDC MarketScape. They must:

- Offer a range of services to customers (e.g., network and interconnection, cloud infrastructure, colocation, remote management, security, BCDR, managed services [i.e., hosting, security network, applications]).

- Have generated over US$100 million in datacenter revenue for FY22 from datacenter-related services (including colocation, bare metal services, interconnection, and so forth).
- Operate a minimum IT load capacity of 150MW (existing and planned capacity).
- Have a datacenter facility located in at least two countries in the Asia/Pacific region.
- Implement environmental, social, and governance (ESG) initiatives for their organization and their stakeholders.
- Focus primarily on end-user organizations rather than wholesale services to technology providers and provide managed datacenter services rather than public cloud services self-managed by customers.

ADVICE FOR TECHNOLOGY BUYERS

Datacenters play a pivotal role in enabling businesses harness the full potential of DX and remain competitive in the ever-evolving technology landscape. Although wholesale datacenters attract large-scale clients with cost-effective solutions and tailored infrastructure, retail datacenters remain resilient because of their unique advantages. Retail datacenters cater to a diverse range of customers, including small and medium-sized businesses (SMBs), by offering flexible solutions that meet their specific needs. These datacenters provide managed services, connectivity options, and onsite support, allowing businesses to focus on their core competencies while leveraging the expertise of datacenter providers. Additionally, proximity to urban areas often found in retail datacenters enables low-latency connections and facilitates collaboration among businesses. Despite the rise of wholesale services, retail datacenters continue to thrive by delivering personalized solutions and maintaining a strong customer-centric approach in this ever-evolving industry.

When considering buying datacenter space in the diverse digital infrastructure landscape of the Asia/Pacific region, several factors should be considered. Understanding the local market conditions, regulatory environment, and cultural nuances is crucial. Each country in the region may have different requirements and regulations governing data security and privacy, which must be adhered to. Evaluating the scalability and flexibility of the datacenter space is essential to accommodate the evolving needs of businesses in a rapidly changing digital landscape. Robust connectivity is another crucial consideration, as the Asia/Pacific region spans vast distances, and reliable network connectivity is crucial for seamless data transmission. Furthermore, assessing the reliability and resilience of the datacenter infrastructure, including power and cooling systems, is vital to ensure uninterrupted operations.

With these foundational considerations in mind, technology buyers must also be adaptive and forward-thinking in their approach. Embracing the rise of as-a-service consumption models can lead to strategic flexibility and efficiency, allowing for streamlined technology adoption and a focus on achieving core business objectives. IDC believes that the focus on ensuring business agility and scalability is boosting demand for consumption-based models across various locations, including public cloud, on-premises, and edge.

A holistic approach, emphasizing both infrastructure and operational solutions, can result in a balanced and future-ready technology strategy. Moreover, given the increasingly digital and interconnected nature of businesses, prioritizing cyber-resiliency in infrastructure decisions is paramount. A tailored, proactive approach to security, rooted in a comprehensive understanding of the latest threats and best practices, will serve technology buyers well in this dynamic landscape.

Lastly, as cloud strategies continue to dominate, the importance of understanding and optimizing workload placement cannot be overstated. Adopting a workload-first mindset ensures that infrastructure decisions align with the specific demands and sensitivities of each application,

promoting both efficiency and security. Through a combination of strategic thinking, diligent research, and a commitment to flexibility, technology buyers can navigate the challenges and opportunities of the modern digital landscape with confidence.

FEATURED VENDOR PROFILE

This section briefly explains IDC's key observations resulting in STT GDC position in the IDC MarketScape. The description here provides a summary of the vendor's strengths and opportunities.

STT GDC

ST Telemedia Global Data Centres (STT GDC) is positioned in the Major Players category in the IDC MarketScape for Asia/Pacific Datacenter Operations and Management 2023.

STT GDC, based in Singapore, operates a global footprint of over 50 datacenters in 15 markets, across two continents. In the Asia/Pacific region, STT GDC commands a substantial footprint with a remarkable 1GW of IT load capacity extending across key markets, such as India, Indonesia, Japan, the Philippines, Singapore, South Korea, and Thailand. Additionally, the company holds a significant ownership stake in GDS, a major player in the China colocation market, with ownership of slightly over a third of the company.

STT GDC has undertaken an ambitious expansion in India and the Southeast region, highlighted by its complete acquisition of Tata Comm's datacenter business in India, resulting in a substantial footprint of 21 sites in the country. STT GDC has ambitious plans to further expand its capacity to 220MW in IT load. Moreover, the company has initiated flagship projects in key cities, such as Bangkok, Jakarta, and Manila, demonstrating its commitment to building hyperscale datacenters and offering colocation and interconnection services supported by significant capital investments.

STT GDC has established a robust R&D capability in Singapore, actively engaging in proof-of-concept (POC) endeavors aimed at enhancing operational efficiency. These initiatives encompass the exploration of clean hydrogen energy, in collaboration with Linde Gas and YTL, as a potential power source for Singapore's datacenter ecosystem. Additionally, STT GDC partnered with PTT Digital to harness cold energy from liquefied natural gas (LNG) regasification for electricity and cooling in datacenters. STT GDC also implements chassis-level precision immersion liquid cooling to reduce dependence on traditional, energy-intensive cooling components. Furthermore, the company's collaboration with ABB and Schneider Electric leverages AI, ML, and advanced analytics to optimize energy usage and reduce the carbon footprint of datacenter facilities.

In tandem with these efforts, STT GDC has joined forces with Firmus Technologies to launch Sustainable Metal Cloud (SMC), a GPU-centric infrastructure as a service (IaaS) in Singapore. SMC provides access to high-performance AI clusters via a bare-metal-service model, utilizing Firmus' immersion-cooled "HyperCube" platform hosted within STT GDC locations. This innovative venture is set to deliver sustainable, scalable, high-performance, and cost-effective AI solutions, with live deployment slated for 2H23 in Singapore, India, and Australia. This collaboration promises to optimize AI workloads, reduce energy consumption and CO2 emissions, and enhance computing efficiency.

STT GDC has made significant strides in its sustainability journey, achieving a commendable 52% renewable energy usage for its global operations. With a firm commitment to reducing greenhouse gas emissions and achieving carbon neutrality by 2030, STT GDC is actively integrating sustainability into its operations. This commitment extends to its partnership with Firmus, with plans to establish the world's inaugural fleet of Sustainable AI Factories. Beginning in Singapore and India, and expanding to other regions, Firmus' HyperCube infrastructure is deployed to support HPC workloads, such as AI, DL, and visual computing, overcoming resource constraints in these

regions. The Cube's scaled immersion computing platform, in conjunction with NVIDIA DL A100 and H100 GPUs and a high-speed network fabric, delivers a sustainable AI computational cloud. SMC is set to provide a hyperscale cluster for DL and Omniverse computing across Asia, India, and Europe, delivered from STT GDC's Cube-enabled sites.

IDC sees STT GDC's key differentiators in the Asia/Pacific market as its ability to rapidly scale and develop innovative solutions. STT GDC is expanding its footprint with the aim of becoming a global datacenter player. The company is actively exploring opportunities to expand into new markets in the Asia/Pacific region and in other major markets, such as the United Kingdom and Germany. Through strategic partnerships focused on developing innovative solutions and expanding its footprint, including its ongoing work on network fabric development, STT GDC is becoming a prominent player in the region.

Strengths

STT GDC's strengths are:

- **Regional footprint.** Fueled by its acquisition and partnerships with local vendors, STT GDC has become a formidable force in Asia/Pacific. With over 700MW of planned capacity, the company's datacenter global footprint, upon completion, will be able to compete against major datacenter providers. What is noteworthy is STT GDC has been particularly aggressive in growth markets, such as the Philippines and Indonesia, historically overlooked by global datacenters. These markets are now undergoing a construction boom as hyperscale demand takes off.
- **Strategic partnerships.** Firmus and STT GDC have joined forces in a collaborative effort to develop Sustainable AI Factories. This partnership aims to harness the power of AI to create environmentally friendly and energy-efficient manufacturing facilities. Additionally, STT GDC has formed strategic alliances with industry giants ABB and Schneider Electric, leveraging AI, ML, and advanced analytics to optimize energy consumption and significantly reduce their datacenter facilities' carbon footprint. These partnerships demonstrate STT GDC's commitment to sustainable practices and its proactive approach toward utilizing cutting-edge technologies to drive positive environmental impact.
- **Innovation lab.** One of key strengths of STT GDC's R&D facility in Singapore is driving growth in datacenter efficiency. As part of its efforts, STT GDC has collaborated with Linde Gas and YTL to explore the viability of clean hydrogen energy as a potential power source for the datacenter ecosystem in Singapore. These POC endeavors underline STT GDC's commitment to sustainable practices and its drive to adopt innovative solutions in the pursuit of a greener and more efficient datacenter industry.
- **Secure platform.** STT GDC's datacenters are designed to meet various compliance and certification requirements, ensuring its customers benefit from globally recognized standards of excellence. To guarantee the utmost security, both physical and technological measures have been incorporated into the company's facilities. Moreover, certain datacenters operated by STT GDC can host government workloads, demonstrating the company's capacity to meet government agencies' stringent security and regulatory demands.

Challenges

STT GDC's challenge is:

- One area in which STT GDC can improve is by enhancing its global brand presence. Although the company has successfully built a strong regional footprint, it currently lacks the global reach that sets it apart from global datacenter players. Indeed, the company is expanding its presence in Europe, with a 56MW facility under construction in Germany,

adding to its existing 200MW footprint in the region. However, to be a global brand, STT GDC will need to consider expansion to other regions, such as North America and the South Pacific. Another drawback of its aggressive expansion and partnerships is that the company's datacenters have non-uniform capabilities across their operated markets. STT GDC's approach of establishing joint ventures with capable local partners is a prudent strategy, enabling the company to effectively address the different regions' diverse requirements. Nevertheless, its country-based expansion has led to the development of separate national platforms, which the company is actively working to integrate in alignment with its growth objectives. By streamlining and harmonizing these platforms, STT GDC can enhance operational efficiency and create a more unified and cohesive organization that can better support its ambitious expansion plans.

Consider STT GDC When

If your organization requires hyperscale or wholesale datacenter services, STT GDC is a compelling choice. The company has a track record of success as a wholesale colocation provider, with clients praising its prompt and high-quality service. In Singapore, STT GDC stands out for its deep understanding of local compliance regulations. Moreover, if your organization plans to expand into emerging markets in which STT GDC is also expanding, the company's expertise in operating in challenging environments will ensure a seamless datacenter experience and provide a reliable platform for your organization's growth.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is with customer needs. The capabilities category focuses on the capabilities of the company and product today, here, and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and GTM plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed. Market share is defined as vendor revenue generated in Asia/Pacific for FY22.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences

to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

This IDC MarketScape covers datacenter operations and management services, including datacenter outsourcing, colocation, managed hosting, and private cloud IaaS. Datacenter services can be found in three segments of IDC's taxonomy: hosted infrastructure services, managed (support) services, and IT outsourcing and cloud services (for additional details, see *IDC's Worldwide Services Taxonomy, 2022* [IDC #US47769222, July 2022]).

Hosting Infrastructure Services and Private Cloud Services

Hosting infrastructure services (HIS) include the management of servers, networking, and other infrastructure solutions in a third-party SP datacenter. HIS encompasses activities related to the provisioning, management, and maintenance of the infrastructure that supports businesses' applications, which include activities around application development and deployment. The specific capabilities delivered under this umbrella typically include support for associated application infrastructure platforms (e.g., middleware, databases, and application servers), comprehensive infrastructure management, and systems-level (as opposed to server-level) administration in support of these application environments. Software-centric activities (i.e., middleware, operating system [OS], and database) are often performed by service providers as part of HIS engagements. HIS also includes any hosting services delivered on a virtualized infrastructure (commonly referred to as "private cloud"), in addition to services supported on a traditional dedicated physical infrastructure.

HIS engagements involve discrete, standalone offerings that are often function or application-specific in nature. Thus, HIS can be distinguished from IT outsourcing by the scope of the service, the nature of the service-level agreements (SLAs), the customers' responsibilities and involvement in service delivery, and the degree of service risk and operational control that is transferred to the service provider.

Given the ongoing transition to cloud models and the emergence of service providers' cloud-based hosting offerings, IDC has simplified the current segmentation of this HIS market into "traditional" or "noncloud" HIS and cloud-based HIS.

The revised HIS market segmentation is defined as follows:

- **Traditional HIS.** These services are delivered in a noncloud fashion and therefore do not conform to the cloud services attributes specified by IDC. Traditional HIS includes legacy shared hosting/virtual private server, dedicated hosting, and complex managed hosting. Traditional HIS typically shares attributes commonly associated with cloud hosting infrastructure (i.e., the ability to rent rather than buy IT infrastructure, standardized packaged solutions) but not others (e.g., self-service, pay-per-use pricing, and elastic scaling).
- **Cloud HIS.** These services combine the use of multitenant (shared) resources, radically simplified packaging, self-service provisioning, highly elastic and granular scaling, flexible pricing (often pay per use/pay as you go), and broad leverage of internet standard technologies to make offerings dramatically easier, cheaper, and better to consume. The cloud segmentation of the HIS market covers services offered by third-party providers, such as hosted private/dedicated cloud and managed public cloud. The cloud portion of HIS does not include private clouds in captive datacenters or unmanaged public cloud/IaaS or virtual private cloud, which IDC has forecast in the document *Worldwide Whole Cloud Forecast, 2017–2021* (IDC #US43215817, December 2017).

- **Colocation.** This subsegment covers commercial/retail colocation services in which the service provider offers colocation services and related datacenter management systems. Colocation services are defined as a customer's use of a third party's datacenter facilities (i.e., physical floor/cage/rack space, network capacity and heating, ventilating, and air-conditioning [HVAC]/power infrastructure) in which the customer operates its own servers/storage systems, network equipment, and other types of infrastructure.

HIS also includes services above and beyond basic hosting functionality, such as equipment rental and maintenance as well as integrated managed services for functions such as storage, backup/recovery, security, and broader management functions, such as monitoring and help desk, which may be included as part of the HIS offering.

In concordance with IDC's demand-side methodology, HIS only includes services consumed by end users (including service providers in which the services provider is an end user) and explicitly does not include HIS that is simply resold by service providers, value-added resellers, or other entities.

Exceptions and Exclusions

Colocation services provided by nondedicated datacenters (e.g., office rental companies providing access to the internet as part of the charge for office space) are not included.

HIS provides infrastructure-driven management functionality that is not specific to a particular type of application. The definition excludes connectivity fees associated with remote access to the datacenter, professional services billed on a time-and-materials basis, and the resale of hardware or software. It also excludes enterprise application management, business process outsourcing (BPO), and application/business productivity functionality delivered via the software-as-a-service (SaaS) or software-on-demand model. As such, HIS does not include the hosted management of enterprise application software but does encompass management of middleware and other types of enabling, infrastructure-oriented software. For example, if the starting point of a client engagement is a request to "manage my SAP application instances," then IDC would define it as hosted application management.

IDC's Worldwide Whole Cloud Forecast, 2017–2021 includes HIS that features multitenant platforms, pay-per-use pricing, self-service capabilities, and all the other attributes commonly associated with cloud services. However, IDC's public cloud forecast is a separate effort from the foundation markets defined in this taxonomy and, as such, the precise level of overlap has yet to be determined.

IT Outsourcing

IT outsourcing services involve a long-term, contractual arrangement in which a service provider takes ownership of and responsibility for managing all, or part of a client's information systems (IS) infrastructure and operations based on an SLA. Typically, IT outsourcing engagements involve contracts for which a large portion of the IS environment is outsourced, usually over a 5- to 10-year period, although the length of these engagements can be much shorter.

At the core of an IS/datacenter outsourcing contract is taking over the management of day-to-day operations of a datacenter and its systems infrastructure (either mainframe-based or through a "server farm") that supports an enterprises business application environment (e.g., enterprise resource planning [ERP], supply chain management [SCM], customer relationship management [CRM], and messaging). At the minimum, these engagements involve ongoing systems infrastructure management, which could include providing just remote infrastructure management but usually also includes providing the ongoing management (24 x 7) of one or more of the following services:

- Endpoint management (e.g., PCs, laptops, and smart devices)
- Local and WAN operations management
- Help desk support

- Datacenter/facilities operations (e.g., ongoing datacenter facilities management) (Datacenter facilities can range from a small closet-like room to full-scale hosting centers, [e.g., tiers 1–4].)
- Application management (e.g., ERP, SCM, CRM, and messaging)
- Hosted application management
- HIS
- Cloud services (e.g., SaaS, platform as a service [PaaS], and IaaS)

The key attributes of engagements for IT outsourcing are as follows:

- **People.** Engagements may involve transferring (rebadging) client personnel or may not involve any transfer of client personnel to the provider.
- **Location of assets.** Assets (e.g., hardware) can either be located at the client site or hosted at the provider's own datacenters (hosted).
- **Ownership of assets.** Assets (e.g., datacenter facility, hardware, and software license) are either owned by the client or the provider.
- **Type of service.** Services involve either just dedicated (to one client) or a combination of dedicated and some shared types of services (e.g., cloud services, such as PaaS, IaaS, and SaaS), which are embedded as part of the engagement. These cloud services are provided by either the primary service provider that holds the direct relationship with the client or can be sourced from another third-party provider but for which the primary provider is responsible for ensuring SLA.
- **Structure of service.** Services can be either customized or standardized.
- **Payment.** Payment can be made as either a fixed or variable fee (e.g., pay as you go).

IT outsourcing contracts can also include related consulting, development, testing, and systems integration activities. This can also include the design and build of a dedicated datacenter facility for the client, whether located at the client site or at the provider's hosting facility. Along with activities performed by the outsourcer's employees, an IT outsourcing contract can include (though does not always include) ongoing capital spending on new equipment and facility needs.

Exceptions and Exclusions

To maintain consistent IDC definitions, IS/datacenter outsourcing does not capture/include outsourcing/managed services engagements that involve just discrete elements of the IT/application environment. These discrete markets include:

- Network and endpoint outsourcing services (NEOS)
- HIS
- Hosted application management (HAM)
- Application management
- BPO (e.g., HR, finance and accounting [F&A], procurement, and customer care)
- Cloud services (e.g., PaaS, IaaS, SaaS, and business process as a service [BPaaS])
- BCDR

LEARN MORE

Related Research

- *Market Analysis Perspective: South Korea Datacenter Operations and Colocation Services Market Trends, 2023* (IDC #AP50326923, August 2023)
- *Southeast Asia Datacenter Operations and Colocation Services Market Trends, 2023* (IDC #AP50326023, August 2023)

- *IDC Survey Spotlight: 2023 Datacenter Sustainability Trends in Southeast Asia* (IDC #AP50326523, August 2023)
- *Asia/Pacific (Excluding Japan) DC Deployment Model and Spend Forecast, 2H22: 2022-2027* (IDC #AP50326223, July 2023)
- *IDC Survey Spotlight: 2023 Digital Infrastructure Deployment Trends* (IDC #AP50326423, May 2023)
- *IDC Survey: Sustainability Trends and Insights for Datacenter Providers in Asia/Pacific (Excluding Japan) in 2023* (IDC #AP49498523, March 2023)
- *IDC FutureScape: Worldwide Cloud 2023 Predictions — APEJ Implications: Positioning for Success — Opportunities for Tech Sales and Marketing Leaders* (IDC #AP49941122, January 2023)
- *IDC FutureScape: Worldwide Cloud 2023 Predictions — APEJ Implications* (IDC #AP49168423, January 2023)
- *IDC FutureScape: Worldwide Future of Digital Infrastructure 2023 Predictions — APEJ Implications* (IDC #AP49699422, January 2023)
- *Market Analysis Perspective: Asia/Pacific Regional Datacenter Operations and Colocation Services Market Trends, 2022* (IDC #AP46315720, July 2022)

Synopsis

This IDC study utilizes the IDC MarketScape framework to examine, analyze, and evaluate the vendors operating in the Asia/Pacific datacenter services market. The research employs a combination of quantitative and qualitative methods to assess the strategies and capabilities of vendors in meeting the requirements of technology buyers that are seeking datacenter operations and management services. The evaluation is conducted using a comprehensive set of parameters that are crucial for fulfilling the current and future needs of technology buyers. This IDC MarketScape report focuses on vendors in the Asia/Pacific datacenter market that have a substantial presence and operational reach across two or more countries in the region.

"Datacenters play a pivotal role in enabling businesses to harness the full potential of digital transformation beyond just providing space and power to house their critical IT infrastructures," says William Lee, research director, Datacenters and Telecommunications research, IDC Asia/Pacific. "As enterprises increasingly understand the need for cohesive integration between their core infrastructures to clouds and edge locations, they will expect datacenter providers to help facilitate this connection."

About IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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