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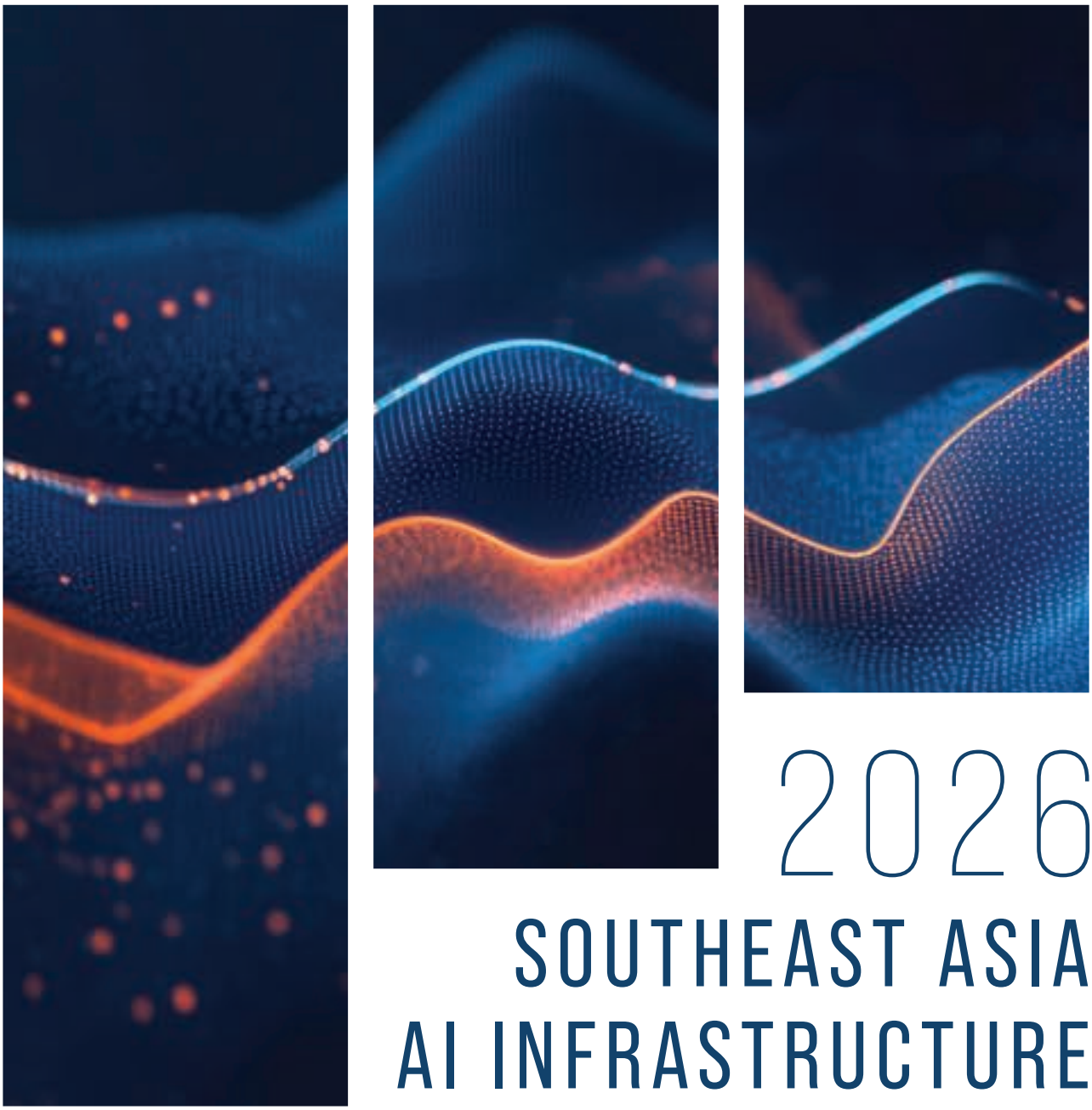
BEST PRACTICES



2026 SOUTHEAST ASIA AI INFRASTRUCTURE TRANSFORMATIONAL INNOVATION LEADERSHIP

Singtel

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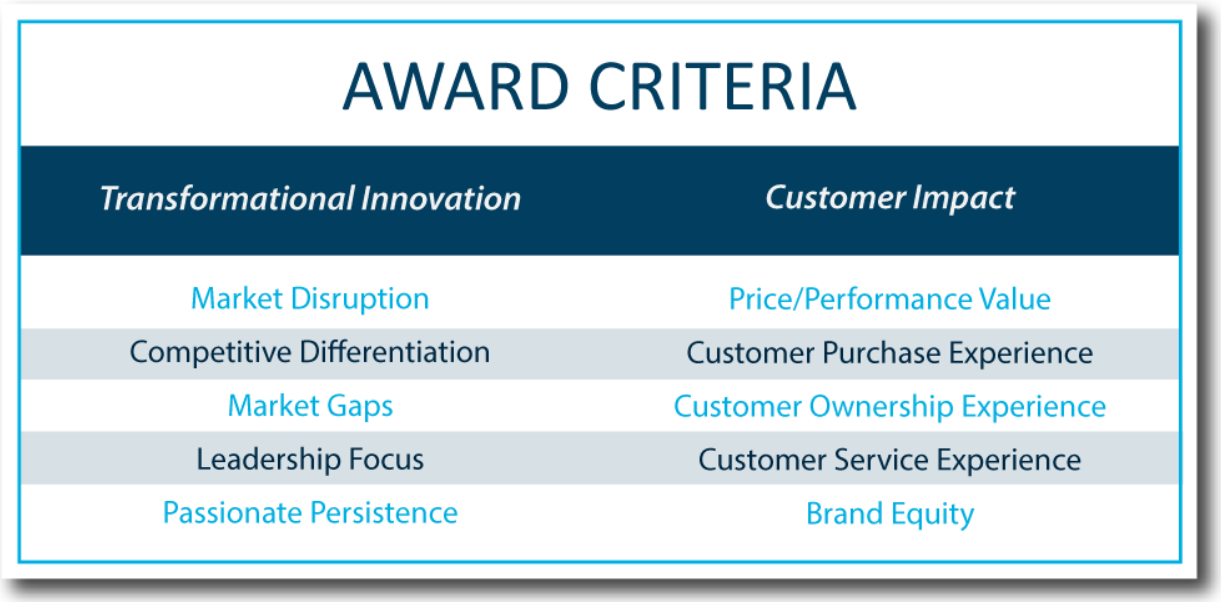
Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Singtel Digital InfraCo excels in many of the criteria in the AI Infrastructure space.



The Transformation of the AI Infrastructure Industry

Market Disruption

Redefining AI Infrastructure Through End-to-End Integration

The rapid rise of artificial intelligence is reshaping infrastructure requirements across industries, creating demand for platforms capable of securely supporting increasingly complex workloads while satisfying rising expectations around sovereignty, performance, and control. Within this environment, Singtel Digital InfraCo recognized those conventional approaches, which treat networks, data centres, compute infrastructure, and AI services as separate layers, would prove insufficient for enterprises seeking to operationalize AI at scale. Rather than participating in the market through isolated infrastructure offerings, Singtel Digital InfraCo pursued a fundamentally different strategy: building an integrated AI infrastructure operating model that unifies connectivity, data-centre resources, GPU capacity, and AI services within a single platform. This approach represents a significant departure from traditional infrastructure delivery models.

By combining sovereign data residency capabilities, highly secure operating environments, and end-to-end infrastructure ownership, the company established a foundation designed specifically for mission-critical AI adoption. Equally important, the model was developed around the realities of the Southeast Asian market, where organizations increasingly require trusted infrastructure environments that align with local regulatory requirements, operational expectations, and data-governance considerations.

Execution played a central role in transforming this vision into market impact. The company moved aggressively to establish leadership through the deployment of direct-to-chip liquid-cooled AI infrastructure and became an early adopter of successive GPU generations, including H100, H200, GB200, and GB300 platforms. These initiatives reinforced its position as a first mover in Singapore's AI infrastructure landscape while providing customers with access to advanced computing capabilities through a purpose-built environment optimised for AI workloads. Beyond infrastructure deployment, the company's architecture places AI resources at the edge of its telecommunications network, bringing models closer to users, applications, devices, and data sources. This creates the conditions for low latency inferencing and supports emerging AI use cases that require real-time responsiveness.

The result is a market-defining AI infrastructure platform that extends beyond traditional hosting and compute provision, reshaping how sovereign, enterprise-grade AI infrastructure is designed, delivered, and consumed across the region.

Competitive Differentiation & Market Gap Resolution

Converting Market Constraints into Competitive Advantage

While the emergence of sovereign AI infrastructure created significant opportunities across Southeast Asia, the market was simultaneously constrained by a set of structural challenges that threatened to limit broader AI adoption. Rather than viewing these conditions as barriers, Singtel Digital InfraCo identified them as opportunities to create durable competitive differentiation. The company's approach was shaped by a clear understanding that AI infrastructure success would depend not only on access to advanced computing resources but also on the ability to overcome constraints associated with power availability, land scarcity, regulatory complexity, talent shortages, capital intensity, and ecosystem maturity.

> *"Rather than participating in the market through isolated infrastructure offerings, Singtel Digital InfraCo pursued a fundamentally different strategy: building an integrated AI infrastructure operating model that unifies connectivity, data-centre resources, GPU capacity, and AI services within a single platform. This approach represents a significant departure from traditional infrastructure delivery models.*
>
> ***- Gautham Gnanajothi, Senior Vice President***

Southeast Asia's unique operating environment presented a particularly complex challenge. Growing demand for AI workloads coincided with finite power resources, limited data-centre capacity, and constrained availability of sovereign GPU infrastructure. At the same time, enterprises operating in highly regulated sectors required infrastructure environments capable of supporting increasingly stringent compliance, governance, and data-sovereignty requirements. These conditions created a gap between what organisations needed from AI infrastructure and what conventional providers could realistically deliver.

Against this backdrop, the company differentiated itself through an integrated operating model that combines secure connectivity, purpose-built AI infrastructure, GPU resources, and operational orchestration and management under a single framework. This approach enables organizations to procure and operate AI infrastructure through a unified service model rather than coordinating multiple providers across networking, hosting, compute, and support layers. Customers can further tailor infrastructure

environments according to workload sensitivity, selecting deployment models ranging from virtual private cloud environments to dedicated physical infrastructure configurations.

Differentiation is also strengthened by the company's deep familiarity with local and regional regulatory frameworks and its longstanding experience operating critical information infrastructure. This combination enables the delivery of AI infrastructure aligned with sovereign requirements and compliance considerations for highly regulated customers. Beyond infrastructure itself, the company has adopted a broader market-development perspective by actively addressing talent, capital, and incubating ecosystem partnerships that could otherwise slow AI adoption. As a result, competitive advantage is created not through a single technology or asset, but through the company's ability to systematically transform multiple market constraints into sustainable sources of value and market leadership.

Leadership Focus & Growth Strategy Excellence

Scaling AI Infrastructure with Purpose and Discipline

Sustaining leadership in the AI infrastructure sector requires far more than early market participation. As infrastructure technologies mature and competitive activity intensifies, long-term success increasingly depends on an organisation's ability to continually anticipate change, deploy capital effectively, and execute against a clear strategic roadmap. For Singtel Digital InfraCo, leadership has been built around a deliberate commitment to remaining ahead of market inflection points rather than reacting to them after they emerge.

This philosophy is reflected in a consistent pattern of first-mover execution. The company has repeatedly positioned itself at the forefront of major infrastructure transitions, including the deployment of direct-to-chip liquid cooling technologies and the adoption of successive generations of NVIDIA GPU platforms. Rather than viewing these initiatives as isolated technology investments, management has treated them as part of a broader strategy designed to secure long-term relevance in a rapidly evolving market. The objective is not simply to achieve leadership, but to continuously reinforce that position through disciplined innovation and timely execution.

The company's growth strategy is further strengthened by its extensive enterprise-market presence. As one of the region's largest enterprise service providers, the Singtel Group possesses established relationships across a broad customer base that increasingly seeks AI infrastructure capabilities. This provides a strong foundation for expanding AI services while shortening adoption pathways and accelerating commercial scale.

Equally important is the company's approach to growth enablement. Recognizing the capital-intensive nature of AI infrastructure, its management has implemented a multifaceted investment strategy that combines asset recycling, external capital partnerships, and infrastructure optimization initiatives. Complementing these efforts is a forward-looking expansion roadmap that extends beyond Singapore through strategic participation in emerging infrastructure opportunities across neighboring markets.

Together, these initiatives demonstrate a leadership model grounded in strategic foresight, disciplined execution, and long-term value creation. By aligning market access, infrastructure investment, technology evolution, and expansion planning within a unified growth framework, Singtel Digital InfraCo has

established the organisational foundations required to sustain AI infrastructure leadership as the market continues to evolve.

Technology Leverage & Operational Excellence

Intelligence-Driven Infrastructure Excellence

Competitive positioning in AI infrastructure is increasingly determined not by access to hardware alone, but by the intelligence, control, and operational capabilities layered above it. Having established a differentiated market position and a scalable growth strategy, Singtel Digital InfraCo has strengthened those advantages through a deliberate focus on innovation and development of intellectual property designed to transform AI infrastructure from a collection of assets into a highly orchestrated, software-defined platform.

This philosophy is embodied in Paragon, the company's in-house developed control-plane platform. Rather than relying exclusively on commercially available software stacks, the organisation invested in developing its own software layer capable of managing multi-tenancy, cybersecurity controls, workload placement, GPU virtualisation, and infrastructure orchestration across the AI environment. The platform provides customers with a highly configurable operating experience while enabling the company to maintain greater control over performance, security, and resource utilisation. This approach is further reinforced by a portfolio of 26 internationally granted patents spanning multiple markets, reflecting a long-term commitment to innovation and intellectual-property development.

> *Underlying these initiatives is a consistent willingness to address challenges that extend beyond immediate commercial priorities. Whether responding to talent shortages, infrastructure limitations, or ecosystem-development requirements, the company has demonstrated a persistent commitment to building long-term capability. This combination of human-capital investment, ecosystem stewardship, and sustained execution strengthens the foundations upon which its future AI infrastructure leadership will continue to evolve*
>
> ***- Gautham Gnanajothi,***
> ***Senior Vice President***

A defining characteristic of the platform is its ability to unite traditionally separate domains of operation. Network intelligence, infrastructure management, and AI workload control operate within a common framework, allowing customers to configure service behaviours aligned to the demands of mission-critical applications. This integration enables a level of operational precision that extends beyond conventional AI infrastructure environments and supports more predictable performance outcomes.

Operational excellence is further strengthened through advanced observability and automation capabilities. The company continuously monitors workloads, GPU utilisation, cooling systems, environmental conditions, and infrastructure health through an integrated operational architecture. Connected alarms, automated responses, and intelligent workload redistribution capabilities allow emerging issues to be identified and addressed rapidly, helping maintain service continuity. These capabilities become increasingly important as AI infrastructure grows in density, scale, and complexity.

By combining software innovation, patent-backed differentiation, infrastructure intelligence, and autonomous operational practices, Singtel Digital InfraCo has established a technology foundation that

enhances efficiency, strengthens resilience, and supports the sustained delivery of enterprise-grade AI infrastructure at scale.

Customer Value & Experience

Delivering AI Infrastructure Around Customer Needs

The ultimate measure of infrastructure excellence lies not in the sophistication of the underlying technology, but in the value it enables customers to realise. Having established a platform capable of addressing industry constraints and supporting advanced AI workloads, Singtel Digital InfraCo focuses on simplifying the journey from infrastructure consumption to operational AI deployment. Its approach is centred on reducing complexity, increasing flexibility, and providing customers with the control required to support highly demanding business environments.

A key differentiator is the company's ability to deliver AI infrastructure through a unified service model. Enterprises often face the challenge of coordinating multiple providers across networking, hosting, compute, and operational support functions, creating fragmented accountability and increasing operational risk. By bringing these elements together under a single commercial and operational framework, Singtel Digital InfraCo provides customers with one point of responsibility and a single service-level commitment spanning the full infrastructure stack. This simplifies management, accelerates deployment, and reduces the burden associated with operating mission-critical AI environments.

Customer value is further enhanced through a highly flexible consumption model. Organisations can select deployment approaches that align with their regulatory, operational, and security requirements, ranging from virtual private cloud environments to dedicated physical infrastructure configurations. This flexibility enables customers to adopt AI on terms that align with the sensitivity and complexity of their workloads rather than adapting their requirements to fit rigid infrastructure models.

Equally important is the degree of visibility and control available to customers. Through the company's integrated infrastructure environment, organisations can configure network behaviours, isolate traffic flows, define performance characteristics, and create operating environments tailored to specific use cases. These capabilities are particularly valuable for enterprises supporting business-critical applications where reliability, performance assurance, and governance requirements must be maintained consistently.

By combining operational simplicity, deployment flexibility, service assurance, and customer-centric configurability, Singtel Digital InfraCo delivers an AI infrastructure experience designed around customer requirements rather than infrastructure limitations. The result is a platform that enables organisations to accelerate AI adoption while maintaining the security, sovereignty, and operational confidence required for long-term success.

Human Capital, Ecosystem Development & Passionate Persistence

Building the Capabilities Behind Sustainable Leadership

Long-term leadership in AI infrastructure depends not only on technology, capital, and operational execution, but also on the ability to develop the talent, expertise, and ecosystem capabilities required to support continued innovation. Recognising that AI infrastructure growth could ultimately be constrained by workforce limitations and ecosystem maturity, Singtel Digital InfraCo has adopted a deliberate

capability-building strategy designed to strengthen the foundations of the broader AI landscape while simultaneously reinforcing its own long-term competitiveness.

Central to this approach is the development of future talent at its source. The company collaborates with universities and Institutes of Higher Learning to help introduce specialised AI infrastructure skills into educational curricula, creating pathways for graduates to enter a rapidly evolving sector. These initiatives are complemented by structured talent-development programmes, including internships, Management Associate programmes, catalyst programmes, and practical on-the-job learning opportunities that accelerate the transition from academic learning to industry contribution.

Capability development extends beyond new entrants. As AI technologies continue to reshape operating environments, the company has invested in reskilling and upskilling initiatives that enable existing employees to acquire new competencies and participate in higher-value AI-focused activities. This commitment is reinforced by a train-the-trainer approach that transforms specialist expertise into institutional capability, allowing knowledge gained from global technology leaders and industry experts to be systematically transferred throughout the organisation.

The same long-term perspective is evident in the company's ecosystem strategy. Rather than focusing exclusively on internal growth, Singtel Digital InfraCo actively supports the development of a broader AI ecosystem by collaborating with government agencies, attracting promising technology providers, facilitating ecosystem participation, and helping connect emerging AI innovators with enterprise demand. This commitment is further demonstrated through its Centre of Excellence for Applied AI with NVIDIA, which brings together AI infrastructure, technology providers, expertise, and enterprise and government use cases to accelerate applied AI innovation while strengthening local capabilities. Through these efforts, the organisation contributes to the development of a more mature and sustainable AI market capable of supporting future innovation and adoption.

Underlying these initiatives is a consistent willingness to address challenges that extend beyond immediate commercial priorities. Whether responding to talent shortages, infrastructure limitations, or ecosystem-development requirements, the company has demonstrated a persistent commitment to building long-term capability. This combination of human-capital investment, ecosystem stewardship, and sustained execution strengthens the foundations upon which its future AI infrastructure leadership will continue to evolve.

Conclusion

Artificial intelligence is reshaping the requirements of digital infrastructure, demanding new levels of scale, control, performance, and operational certainty. Within this rapidly evolving environment, Singtel Digital InfraCo has demonstrated a clear conviction that the future of AI infrastructure extends beyond individual technologies and requires the seamless integration of connectivity, compute, facilities, operations, and ecosystem enablement. That conviction has guided the development of a sovereign, end-to-end AI infrastructure platform purpose-built to address the complexities of enterprise and mission-critical AI adoption.

The company's success is not defined by a single innovation, investment, or market position. Rather, it stems from the way multiple strengths reinforce one another. Market disruption has been supported by differentiated execution; leadership ambition has been reinforced through disciplined growth strategies; proprietary software innovation and operational excellence have strengthened resilience and performance; and customer-centric delivery models have translated technical capabilities into meaningful business outcomes. Equally important, sustained investment in talent development and ecosystem advancement ensures that these advantages remain enduring rather than temporary.

By transforming structural market constraints into competitive strengths while simultaneously advancing the maturity of the broader AI landscape, Singtel Digital InfraCo has established itself as a defining force in Southeast Asia's AI infrastructure sector. Its vision, execution, innovation, customer focus, and long-term commitment to capability development collectively distinguish the company as a deserving recipient of the Transformational Innovation Leadership Award.

With its strong overall performance, Singtel Digital InfraCo earns Frost & Sullivan’s 2026 Southeast Asia Transformational Innovation Leadership Recognition in the AI Infrastructure industry.

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What You Need to Know about the Transformational Innovation Leadership Recognition

Frost & Sullivan's Transformational Innovation Leadership Recognition identifies the best up-and-coming, potentially disruptive market participant.

Best Practices Recognition Analysis

For the Transformational Innovation Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Transformational Innovation

Market Disruption: Innovative new solutions have a genuine potential to disrupt the market, render current solutions obsolete, and shake up competition

Competitive Differentiation: Solutions or products articulate and display unique competitive advantages

Market Gaps: Solution satisfies the needs and opportunities that exist between customers' desired outcomes and their current market solutions

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

Passionate Persistence: Tenacity enables the pursuit and achievement of seemingly insurmountable industry obstacles

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	Opportunity Universe	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	Transformational Model	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	Ecosystem	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	Growth Generator	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	Growth Opportunities	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	Frost Radar	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	Best Practices	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	Companies to Action	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

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 Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

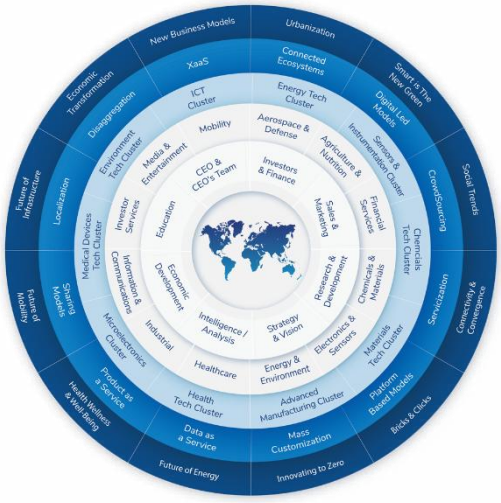
Learn more.

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:

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