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**COMPETITIVE
STRATEGY LEADER**

*Transforming Innovation Into High-Growth
Performance and Competitiveness*

*RECOGNIZED FOR BEST PRACTICES IN THE
SOUTHEAST ASIA GPU-AS-A-SERVICE INDUSTRY*

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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 RE:AI excels in many of the criteria in the GPU-as-a-Service space.

RECOGNITION CRITERIA	
Strategy Innovation	Customer Impact
Strategy Effectiveness	Price/Performance Value
Strategy Execution	Customer Purchase Experience
Competitive Differentiation	Customer Ownership Experience
Executive Team Alignment	Customer Service Experience
Stakeholder Integration	Brand Equity

The Infrastructure Gap in the AI Economy

The potential of artificial intelligence (AI) to transform industries through faster innovation and smarter decisions drives unprecedented demand for high-performance computing powered by graphics processing units (GPUs). However, the limited supply and high cost of GPUs, combined with the expense of building AI-ready infrastructure, force most enterprises to rely on hyperscalers for access to compute. To maximize utilization, hyperscalers direct their AI infrastructure investments toward large markets with strong enterprise bases, robust AI ecosystems, and high cloud demand.

This focus puts enterprises in underserved regions, such as Southeast Asia (SEA), at a disadvantage compared to GPU-rich markets like the United States, Europe, and China, thereby restricting their ability to innovate, compete, and scale in the global digital economy. Renting GPU capacity from overseas offers access but imposes considerable expenses and adds latency, which slows responsiveness. It also creates compliance and data sovereignty risks, especially for industries that handle sensitive information and must keep their AI infrastructure within national borders.

These challenges create opportunities for regional providers such as data center operators to step in and deliver AI-ready infrastructure that enables local enterprises to innovate, compete globally, and future-proof their businesses.

Delivering End-to-end, Reliable, Scalable, and Future-ready AI Factory

A leading digital infrastructure provider, Singapore Telecommunications Limited (Singtel), combines extensive data center assets, strong connectivity, its homegrown patented Paragon software, and

strategic partnerships to spearhead the establishment of AI infrastructure in the SEA region. In October 2024, Singtel launched RE:AI, its sovereign AI Cloud Service operated through its wholly owned subsidiary Digital InfraCo. At its core, RE:AI delivers AI-as-a-Service (AIaaS) and GPU-as-a-Service (GPUaaS), providing enterprises with on-demand access to high-performance GPUs such as NVIDIA H100s and GB200, while paving the way for GB300 Grace Blackwell Superchips in 2026, without the burden of ownership costs.

RE:AI sets itself apart by going beyond GPUaaS, integrating compute, connectivity, applications, and orchestration. RE:AI sets new standards for AI infrastructure excellence and enterprise-scale GPU-as-a-Service delivery. This end-to-end approach provides reliable, flexible, and future-ready AI infrastructure that few competitors globally can match.

Singtel RE:AI's extensive infrastructure portfolio and strong telco heritage provide a distinct competitive edge, enabling true end-to-end service level agreements with assured performance. Innovation is central to RE:AI's competitive strategy. By maintaining full-stack control—including data centers, network connectivity, AI compute and applications orchestration—RE:AI ensures unmatched reliability, sovereignty, and adaptability. Its AI infrastructure supports mission-critical workloads across regulated sectors, such as government, finance, research, and healthcare, enabling compliance without compromising performance. By retaining the Paragon orchestration software in-house, Singtel RE:AI

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- Renato Pasquini
Vice President, Research

ensures differentiation and operational control, allowing it to scale workloads dynamically across multi-clouds including those from major hyperscalers, optimize resource allocation, enforce consistent policies across regions, and rapidly implement new features or optimizations without relying on third-party platforms. As a result, enterprises gain secure, local, and reliable AI services across the entire value chain, from connectivity to GPU-powered processing and cloud delivery.

Its control of core assets also enables rapid adaptation; for example, leveraging network exchange sites for its AI factory to enable low latency data transfer for AI workloads and retrofitting network exchanges from

traditional air cooling to energy-efficient liquid cooling to support high-density GPU clusters. This agility in transforming infrastructure enables Singtel RE:AI to outpace its competitors, avoid lengthy lead times for new builds, and solidify its position as the trusted AI partner for enterprises and governments in the region.

As the first mover in Singapore's AI infrastructure space, Singtel RE:AI has been leveraging pre-existing data center Points of Presence in Singapore to deliver GPUaaS. However, to meet the escalating demand for AI workloads and provide a more scalable and sustainable infrastructure, Singtel is investing in the development of its largest data center to date: DC Tuas. The new data center is currently under construction and will offer 58 megawatts (MW) of information technology load capacity after its 2026 launch. Additionally, DC Tuas will be connected to Singtel's existing cable landing station, enhancing its global connectivity and supporting high-bandwidth, low-latency applications.

Singtel RE:AI has built a replicable blueprint for regional scale. This advantage positions the company to establish regional leadership by leveraging Nxera, its regional data center arm, and regional partners to drive AI-ready data center rollouts in Thailand, Indonesia, and Malaysia. As such, Singtel RE:AI is well positioned to have localized infrastructure for GPUaaS offerings in these three countries in future. With this investment, Singtel's data center capacity across Singapore, Malaysia, Thailand, and Indonesia by the end of 2026 will approximately double to 200 MW.

Competitive Edge through Sovereign AI and Global-Regional Partnerships

In a rapidly evolving AI landscape, Singtel RE:AI distinguishes itself through a combination of forward-looking strategy, sovereign-first infrastructure, and strong regional partnerships. By addressing the unique needs of regulated and compliance-sensitive industries, Singtel RE:AI moves beyond conventional market segments to capture high-value opportunities where trust, data sovereignty, and security are paramount. As a trusted sovereign operator, Singtel anchors its RE:AI strategy in an AI factory that delivers secure, end-to-end connectivity—seamlessly connecting data from campus to cloud over sovereign-grade networks, including quantum-encrypted links and dark fiber. RE:AI further strengthens this position by providing secure data center facilities for sensitive workloads, leveraging ISO 27001-certified Tier III infrastructure to ensure high standards of protection. This approach positions Singtel RE:AI as the preferred partner for sectors such as government, banking, IHLs and research, and healthcare, where adherence to regulations and risk management is non-negotiable.

It also differentiates Singtel in SEA's competitive landscape, where most providers target global enterprises, consumer companies, or small and medium enterprises, while few focus on sovereign and regulated markets. By serving customers who value compliance and security assurance, Singtel RE:AI's approach is both sustainable and risk-averse, anchoring its AI cloud business in sectors with enduring demand and strong regulatory alignment.

Singtel RE:AI drives scale and enhances its AI offerings by forming regional and global partnerships that extend market reach and empower enterprises with greater choice. To accelerate adoption across SEA, RE:AI leverages the Bridge Alliance, a global consortium of 35 mobile operators. Through this network, local telcos such as Telkomsel in Indonesia and Maxis in Malaysia can resell RE:AI services directly to enterprises in their respective markets. In parallel, Singtel's data center business (Nxera) also supports growth through colocation, offering liquid-cooled, AI-ready facilities to hyperscalers and enterprises looking to deploy their own AI chips. This dual approach gives Singtel RE:AI deep local reach, trusted go-to-market channels, and the flexibility to serve a broad spectrum of customer needs.

Singtel RE:AI's strategy also encompasses global partnerships with new-generation cloud providers and hyperscalers. For global enterprises in the SEA region, these collaborations translate into unprecedented flexibility and choice. Through partnerships with Vultr (US), Nscale (Europe), and GMI Cloud (Asia), alongside integrations with major hyperscalers like AWS, Azure, and Oracle, businesses gain seamless access to GPU resources worldwide. Powered by Paragon, Singtel's proprietary orchestration platform, customers enjoy a single pane of glass to deploy AI workloads efficiently across Singtel-owned regions and partner clouds, optimizing cost, compliance, or proximity, and choosing between keeping data sovereign in-country or leveraging lower-cost GPUs overseas. This freedom stands in sharp contrast to hyperscalers

that lock customers into closed ecosystems. Singtel RE:AI's aggregated, superset view of global GPU resources empowers enterprises to adopt AI on their own terms while ensuring secure, sustainable, and scalable growth in the digital economy.

Frost & Sullivan recognizes Singtel RE:AI's strategic foresight in leading the AI infrastructure landscape in SEA. By investing in AI-ready data centers and leveraging its full-stack control and end-to-end service assurance, the company has a distinctive competitive advantage, positioning it as the preferred partner for enterprises across industries seeking to accelerate AI-driven transformation.

Driving Competitive Advantage through Sustainable AI and Superior Service

Sustainability is a cornerstone of Singtel's RE:AI strategy, addressing the significant energy demands of high-density AI infrastructure through a combination of technological innovation and strategic energy management. In Singapore, where renewable energy availability is limited, Singtel RE:AI deploys liquid cooling across its AI farms, reducing power usage effectiveness to below 1.25 when running at full

capacity.¹ This capability significantly lowers energy consumption and carbon emissions. Complementing these measures, Singtel invests in renewable energy certificates and partners with regulators to expand long-term access to renewables. Together, these initiatives enable enterprises running AI workloads on RE:AI to operate on infrastructure that is sustainable, resilient, and aligned with long-term net-zero commitments.

Singtel RE:AI also differentiates itself through a highly advanced customer service model, leveraging decades of experience operating sovereign infrastructure and integrating advanced automation. Service delivery is software-driven, automated, and proactive, enabling

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- Rubini Kamal
Best Practices Research Analyst

high reliability and performance with a lean operations footprint. Every RE:AI facility features multi-level monitoring per GPU, rack, system, and data hall, integrating data from chillers, central processing units, networks, and building systems. AI-powered analytics detect anomalies, infer potential issues, and trigger standard operating procedures in real time. In most cases, the system automatically resolves performance issues, requiring human intervention only in exceptional circumstances.

This predictive and proactive approach ensures high uptime and reliability. For example, if a GPU shows abnormal heat, the system preemptively shifts workloads and manages affected components to prevent disruption. Singtel RE:AI further reinforces this differentiated service through a dedicated customer success function, engaging clients to gather feedback, identify feature gaps, and incorporate insights into the roadmap. The company provides enablement sessions where needed, helping customers maximize

¹ <https://www.singtel.com/about-us/media-centre/news-releases/singtel-secures-green-loan-for-dc-tuas>

the value of RE:AI while respecting regulatory and confidentiality constraints typical of government, research, and regulated industries.

By combining sustainable infrastructure, predictive automation, and proactive customer engagement, Singtel RE:AI delivers a level of service maturity that supports mission-critical AI workloads with confidence, transparency, and care, strengthening its competitive positioning and reinforcing RE:AI as a trusted, sustainable, and high-performance sovereign AI platform.

Scaling AI Impact through Robust Ecosystem, Innovation, and Leadership

Singtel RE:AI's commitment to accelerating AI adoption is evident in its strategy of delivering turnkey, industry-specific solutions. By tailoring offerings for sectors such as finance, healthcare, government, and research, RE:AI helps enterprises reduce complexity, accelerate time-to-value, and lower barriers to AI adoption. At the RE:AI launch, Singtel introduced strategic partnerships spanning research, manufacturing, and technology development, demonstrating the practical value of RE:AI across diverse industries.

Demand for Singtel RE:AI's AI cloud has been robust. In Singapore, RE:AI reached very high utilization shortly after launch, driven by government agencies and research institutions. Similarly, the Nxera data center in Thailand had high customer adoption immediately after its opening, highlighting strong market demand for sovereign, sustainable, and AI-ready capacity.

An example of RE:AI in action is SEA-LION v3, a SEA-focused large language model developed by AI Singapore. Pre-trained on Singtel's RE:AI infrastructure using 64x8 NVIDIA H100 GPUs, SEA-LION achieved breakthrough performance across 11 regional languages, demonstrating how it supports customer-driven innovation, enabling global-scale models while fostering homegrown solutions tailored to the region's unique linguistic and cultural context.

Singtel RE:AI continues to expand its ecosystem through strategic partnerships with model developers, application providers, and government agencies. These collaborations strengthen turnkey offerings and accelerate enterprise adoption. For instance, partnerships with Mistral, H2O.ai, Hippocratic.AI, Hive AI, and AlphaSense are enabling the development of ready-to-deploy solutions across healthcare, finance, market intelligence, and enterprise generative AI tools. Its partnership with Singapore's Economic Development Board fosters a comprehensive ecosystem by providing incentives to industries to accelerate AI adoption while supporting talent growth. Complementing this, the AI Acceleration Academy aims to train over 10,000 individuals within Singtel's workforce in AI skills, promoting long-term development of regional digital talent and aligning with Singapore's National AI Strategy 2.0.

Customer demand and long-term innovation continue to shape Singtel's RE:AI roadmap. The company is diversifying its infrastructure beyond NVIDIA GPUs, exploring inference-optimized hardware and new partnerships to meet evolving enterprise requirements. By combining a strong partner ecosystem, proven solutions, and customer-driven insights, Singtel ensures RE:AI meets immediate enterprise needs while shaping the future of AI infrastructure in SEA, reinforcing its position as a leading AI infrastructure provider in the region.

Conclusion

Frost & Sullivan believes that innovation and growth opportunities drive future success, and having a competitive strategy is critical. Singtel RE:AI has been a pioneer in the GPUaaS industry in Singapore and leads the AI infrastructure market through full-stack control, sovereign-first, AI-optimized infrastructure, and strategic partnerships, enabling enterprises to scale AI workloads efficiently, ensure data sovereignty, and accelerate AI-driven transformation. Its growth pipeline is robust, as it expands its data center capacity across Singapore, Malaysia, Thailand, and Indonesia to approximately double to 200 megawatts by year-end 2026 and positions itself as the leading provider in Southeast Asia. Overall, Singtel RE:AI develops and implements its strategy with its enterprise and government customers in mind, securing its position as a trusted partner and market leader in AI infrastructure.

With its strong overall performance, Singtel RE:AI earns Frost & Sullivan's 2025 Southeast Asia Company of the Year Recognition in the GPU-as-a-Service industry.

What You Need to Know about the Competitive Strategy Leadership Recognition

Frost & Sullivan's Competitive Strategy Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Competitive Strategy Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Strategy Innovation

Strategy Effectiveness: Effective strategy balances short-term performance needs with long-term aspirations and overall company vision

Strategy Execution: Company strategy utilizes best practices to support consistent and efficient processes

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

Executive Team Alignment: Executive team focuses on staying ahead of key competitors via a unified execution of its organization's mission, vision, and strategy

Stakeholder Integration: Company strategy reflects the needs or circumstances of all industry stakeholders, including competitors, customers, investors, and employees

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

