FROST & SULLIVAN

BEST PRACTICES

2026

SINGAPORE SD-WAN AND SASE SERVICE PROVIDER

COMPANY OF THE YEAR

Singtel

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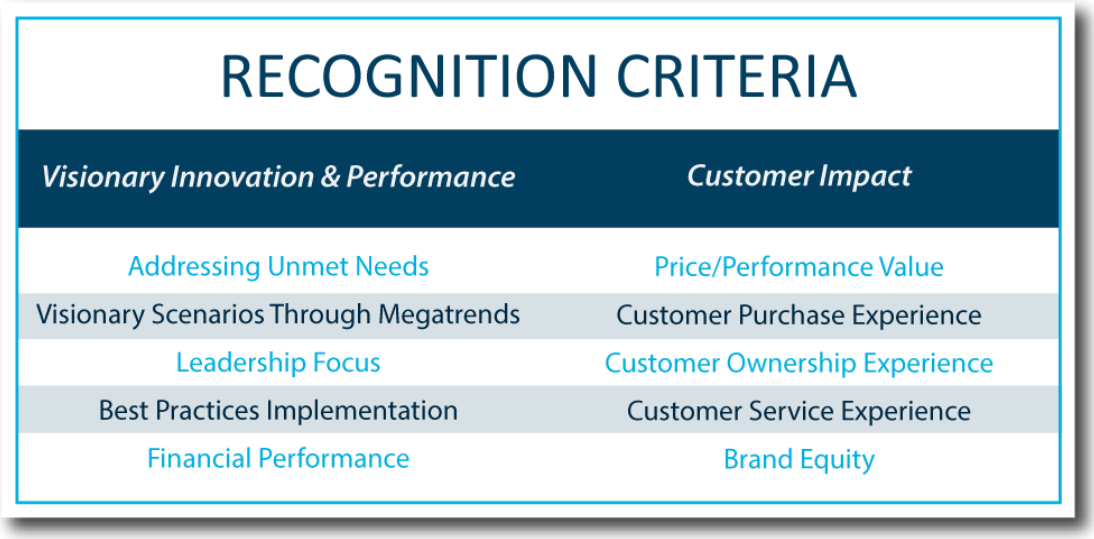
Best Practices Criteria for World-Class Performance

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 excels in many of the criteria in the SD-WAN and SASE service provider space.



Singapore Software-Defined Wide Area Network (SD-WAN) and Secure Access Service Edge (SASE) Service Provider Market

Singapore's SD-WAN and SASE service provider market is shaped by the city-state's role as a regional business hub, an advanced digital infrastructure, and strong regulatory requirements for security and resilience. Enterprises in Singapore increasingly operate hybrid and multi-cloud environments while supporting distributed workforces, driving demand for scalable, secure, and performance-driven connectivity solutions.

The market is shifting away from traditional Multi-Protocol Label Switching (MPLS)-centric architectures toward SD-WAN-enabled hybrid connectivity combined with cloud-delivered security services. SASE adoption is accelerating as organizations seek to consolidate networking and security, improve visibility, and enforce consistent Zero Trust policies across users, devices, and applications. Key demand drivers include cloud migration, cybersecurity risk exposure, data protection regulations, and the growing importance of SaaS and digital platforms.

Service providers differentiate themselves through multi-vendor support, depth of managed services, local network ownership, and the ability to integrate SD-WAN, Secure Service Edge (SSE), and managed security operations. Singapore's mature enterprise base prioritizes reliability, service assurance, and compliance, favoring providers with strong operational capabilities and local presence. As enterprises expand into IoT, 5G, and edge computing, the SD-WAN and SASE market in Singapore continues to evolve toward more intelligent, automated, and service-centric models.

Driving Strategic Stewardship of Secure Connectivity Leadership

Singtel's leadership focus is anchored in Singtel CUBΣ (CUBE), its flagship connected intelligence platform designed to orchestrate secure connectivity at scale. Through CUBΣ, Singtel demonstrates a strategic shift beyond traditional telecommunications toward a platform-led model that unifies SD-WAN, SASE, and managed security under a single operational platform.

CUBΣ embodies Singtel's ecosystem mindset by integrating best-in-class partners, including Palo Alto Networks, Zscaler, Fortinet, and Cisco, within a single, Singtel-managed platform. This allows enterprises to adopt leading SD-WAN and SASE technologies without assuming fragmentation or integration risk typically associated with multi-vendor deployments.

CUBΣ reduces this risk through centralized orchestration, unified policy management, and single-provider operational accountability under common SLAs, eliminating the need for customers to self-integrate multiple solutions.

Singtel's disciplined and responsible approach to AI adoption within CUBΣ focuses on clearly defined operational use cases such as analytics, routing optimization, and security monitoring, with human oversight, governance, and accountability embedded into workflows.

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>
> ***– Tetsuya Niihara***
> ***Director***

Compared to competitors that rely on vendor-embedded AI within individual products, Singtel differentiates itself by applying AI at the platform orchestration layer, maintaining consistent control and accountability across best-in-class technologies.

By aligning strategy, delivery, and go-to-market execution around CUBΣ, Singtel reinforces confidence among enterprise customers by leveraging its nationwide network infrastructure in Singapore, supported by regional and global enterprise connectivity coverage, and establishes itself as a long-term steward of secure connectivity leadership.

Architecting the Future of Intelligent and Secure Networks

Singtel expresses its vision for intelligent and secure networks through CUBΣ, a cloud-native platform that anticipates the convergence of networking, security, AI operations, and edge computing. Rather than pursuing isolated innovations, CUBΣ serves as the foundation for autonomous, data-driven enterprise networks.

Capabilities such as AI Studio, digital twin modeling, and intelligent routing are embedded within the CUBΣ platform, supporting predictive insights, proactive optimization, and data-driven operational decision-making across distributed environments. By design, CUBΣ supports dynamic workloads, AI-enabled services, and expanding device ecosystems through controlled orchestration and consistent policy enforcement, while maintaining strong governance and operational control.

CUBΣ also extends Singtel's vision beyond fixed networks by integrating mobile and 5G-native security into a single platform. This allows Zero Trust principles to be consistently enforced across cloud, IoT, and cellular access, positioning Singtel at the forefront of next-generation enterprise architectures.

Solving Enterprise Connectivity and Security Complexity at Scale

Enterprises operating in hybrid and multi-cloud environments increasingly face operational fragmentation, rather than pure technology gaps. Many organizations rely on a mix of local broadband, private links, cloud connectivity, and multiple security platforms sourced from different vendors. This often results in limited end-to-end visibility, inconsistent security policy enforcement, slow incident resolution, and unclear accountability across network and security domains, challenges that most in-house IT teams struggle to manage at scale.

CUBΣ directly addresses these unmet needs by acting as a single operational and governance layer across heterogeneous connectivity and security environments. Instead of requiring customers to integrate and manage each component independently, CUBΣ consolidates SD-WAN, SASE, and managed security services into a unified platform operated by Singtel. This reduces operational silos, simplifies policy management, and establishes a clear single point of accountability for service performance and security outcomes.

> *"Importantly, CUBΣ is designed to integrate legacy infrastructure, multiple security platforms, and third-party networks, realities common in mature enterprise environments. While Singtel is not the only provider in Singapore offering managed single-vendor solutions, it differentiates itself through a pragmatic, platform-led execution approach that combines multi-vendor integration with localized, telco-grade operational ownership."*
>
> ***– Tetsuya Niihara***
> ***Director***

CUBΣ is designed to accommodate varying levels of customer maturity. Organizations with limited security resources can rely on Singtel-operated services delivered under defined SLAs, while more mature enterprises retain flexibility through co-managed models. In both cases, complexity is reduced because orchestration, monitoring, and change management are coordinated on a single platform rather than dispersed across multiple tools and vendors.

In practice, large regional enterprises using CUBΣ have been able to consolidate fragmented network and security operations, gain unified visibility across sites and cloud workloads, and standardize security controls without redesigning their entire infrastructure. This platform-led approach demonstrates how Singtel aligns CUBΣ's design directly with real enterprise pain points, effectively addressing the operational and governance challenges that drive demand for managed SD-WAN and SASE services today.

Operationalizing Vision through Scalable and Disciplined Execution

Singtel operationalizes its SD-WAN and SASE vision through Singtel CUBΣ, which provides a standardized, automation-driven execution model. By leveraging CUBΣ's orchestration engines, Singtel delivers consistent service provisioning, reducing deployment timelines and configuration risk across complex enterprise environments.

AIOps capabilities embedded within CUBΣ further reinforce operational excellence. By analyzing telemetry across connectivity and security domains, CUBΣ reduces alert noise, improves root-cause analysis, and enhances service stability post-deployment.

Importantly, CUBΣ is designed to integrate legacy infrastructure, multiple security platforms, and third-party networks, realities common in mature enterprise environments. While Singtel is not the only provider in Singapore offering managed SD-WAN and SASE services, it differentiates itself through a platform-led execution model that combines multi-vendor integration with localized, telco-grade operational ownership.

Compared with major global providers, which typically operate through regionally distributed, product-centric service models, Singtel delivers centralized orchestration and single-provider accountability anchored in Singapore's nationwide infrastructure. This pragmatic, platform-centric approach ensures implementations are sustainable at scale, establishing Singtel as a benchmark for managed SD-WAN and SASE delivery in Singapore.

Simplifying the Journey to Secure, Integrated Connectivity

Singtel simplifies the enterprise procurement journey through CUBΣ by reducing the complexity typically involved in sourcing, evaluating, and contracting SD-WAN, SASE, and connectivity services from multiple vendors. Instead of managing separate commercial discussions, technical assessments, and contractual frameworks, enterprises engage with Singtel through a cohesive, solution-led procurement process aligned with business and risk requirements.

Through the CUBΣ platform, customers can assess secure connectivity options as integrated service outcomes rather than discrete products, enabling clearer comparison, faster decision-making, and phased adoption without restructuring commercial or operational models. This streamlined procurement approach lowers entry barriers, shortens buying cycles, and improves confidence for enterprises adopting secure connectivity at scale.

CUBΣ supports both consultative engagement and digital self-service by allowing enterprises to begin their adoption journey through Singtel-led solution discovery and architecture design, before progressively transitioning to self-managed consumption if and when they are ready. In the consultative engagement model, Singtel works closely with customer stakeholders to assess existing network complexity, security posture, AIry requirements, and operational maturity, and then maps these requirements into an integrated SD-WAN and SASE solution under the CUBΣ platform.

This approach is differentiated by Singtel's ability to combine local network ownership, managed service operations, and platform orchestration within a single engagement. Unlike product-centric providers that rely primarily on standardized templates or partner-led integration, Singtel assumes end-to-end responsibility for solution design, deployment, and ongoing operations. As a result, customers can adopt secure connectivity solutions at a pace aligned with their internal readiness and benefit from Singtel's expertise throughout the lifecycle. Enterprises can start with foundational connectivity or SD-WAN services and progressively expand into SASE and managed security without restructuring commercial or technical foundations.

For example, Singtel has publicly highlighted enterprise deployments in which customers initially modernized their WAN connectivity and SD-WAN architecture before incrementally extending security capabilities, such as cloud-based access controls and managed security services. This phased adoption model allows enterprises to evolve their secure connectivity posture in line with business priorities and internal readiness, without requiring disruptive redesigns of their underlying network or operating model.

By aligning purchasing decisions with customer readiness through CUBΣ, Singtel reduces complexity, accelerates adoption, and improves overall confidence, particularly for large and regulated organizations in Singapore.

Delivering Sustained Value Across the Service Lifecycle

Through CUBΣ, customers benefit from a consistent and predictable ownership experience that extends beyond initial deployment. CUBΣ remains the operational backbone of the environment, enabling customers to gain end-to-end visibility and proactive insights across SD-WAN, SASE, and connectivity services. This reduces operational uncertainty, shortens response cycles, and allows internal teams to focus on strategic priorities rather than day-to-day issue triage.

Customers also benefit from Singtel's integrated Network Operations Center (NOC) and Security Operations Center (SOC) support model. Through this setup, customers gain continuous network performance monitoring, coordinated fault isolation, proactive threat detection, and structured incident escalation within a single operational platform. While Singtel does not publicly disclose aggregated mean time to resolution (MTTR) metrics, customers typically experience faster and more predictable incident resolution compared with fragmented, multi-vendor support models, as issues are managed end-to-end by a single service provider.

CUBΣ supports flexible ownership models based on customer preference and maturity. Under a fully managed model, customers delegate day-to-day monitoring, configuration changes, and incident response to Singtel, benefiting from defined service levels and operational accountability. Under a co-managed model, customers retain control over selected policies or internal tools while Singtel provides continuous monitoring, security oversight, and escalation support. In both cases, services remain coordinated through the same CUBΣ platform, preventing operational fragmentation. By anchoring the entire service lifecycle on a single, Singtel-managed platform, customers gain transparency, reliability, and long-term confidence that their secure connectivity environment can scale and evolve without increasing operational burden.

Conclusion

Singtel distinguishes itself in Singapore's SD-WAN and SASE market through Singtel CUBΣ (CUBE), its connected intelligence platform that unifies secure, integrated connectivity across networks, cloud, endpoints, and emerging edge environments. In a market where enterprises must balance cost efficiency with operational resilience and security accountability, CUBΣ fills a critical gap by enabling unified, multi-vendor managed SD-WAN and SASE services purpose-built for Singapore's local and regional enterprise realities.

Through the CUBΣ platform, Singtel brings together strong network ownership, advanced security integration, and AI-driven operational platform. This allows enterprises to achieve consistent performance, accelerate response, and continuously optimise security operations across heterogeneous infrastructures. By extending secure connectivity beyond traditional perimeters to include cloud workloads, IoT devices, and cellular access, CUBΣ positions Singtel as a forward-looking provider aligned with evolving Zero Trust and edge-first architectures.

Singtel's disciplined execution is embedded within CUBΣ's automation, orchestration, and integrated NOC and SOC operations, ensuring reliable service delivery at scale, simplifying complexity, strengthening cyber resilience, and delivering a seamless, outcome-driven customer experience while significantly reducing operational burden for customers. Anchored by decades of trust as Singapore's leading digital infrastructure provider, Singtel, through CUBΣ, demonstrates strong leadership, technical depth, and sustained market relevance in the SD-WAN and SASE services landscape.

With its comprehensive vision, execution excellence, and customer-centric approach, Singtel earns Frost & Sullivan's 2026 Singapore Company of the Year Recognition in the SD-WAN and SASE service provider industry.

What You Need to Know about the Company of the Year Recognition

Frost & Sullivan's Company of the Year 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 Company of the Year Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Visionary Innovation & Performance

Addressing Unmet Needs: Customers' unmet or underserved needs are unearthed and addressed to create growth opportunities across the entire value chain

Visionary Scenarios Through Megatrends: Long-range scenarios are incorporated into the innovation strategy by leveraging megatrends and cutting-edge technologies, thereby accelerating the transformational growth journey

Leadership Focus: The company focuses on building a leadership position in core markets to create stiff barriers to entry for new competitors and enhance its future growth potential

Best Practices Implementation: Best-in-class implementation is characterized by processes, tools, or activities that generate consistent, repeatable, and scalable success

Financial Performance: Strong overall business performance is achieved by striking the optimal balance between investing in revenue growth and maximizing operating margin

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)