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**TECHNOLOGY
INNOVATION
LEADER**

*Enhancing Customer Impact Through
Powerful Technology Integration*

*RECOGNIZED FOR BEST PRACTICES IN THE
GLOBAL AI HIGH DENSITY INFRASTRUCTURE
INDUSTRY*

F R O S T & S U L L I V A N

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. EdgeConneX excels in many of the criteria in the AI high density space.

RECOGNITION CRITERIA	
<i>Business Impact</i>	<i>Technology Leverage</i>
Financial Performance	Commitment to Innovation
Customer Acquisition	Commitment to Creativity
Operational Efficiency	Stage Gate Efficiency
Growth Potential	Commercialization
Human Capital	Application Diversity

AI-Optimized and Scalable Data Center Infrastructure

Artificial intelligence (AI) and high-performance computing (HPC) workloads are reshaping where and how computing takes place. Training large language models, running inference closer to users, and supporting real-time applications such as connected vehicles and industrial automation are driving facilities toward higher rack densities, advanced cooling methods, and more efficient power distribution. To sustain these demands, distributed architectures that combine centralized training hubs with localized inference points are becoming the preferred model for global deployment.

Frost & Sullivan observes that this evolution exposes the structural and operational limits of traditional data center designs. The growing concentration of thermal and electrical intensity within AI clusters challenges conventional mechanical and electrical systems, while the transition to liquid-based cooling introduces new operational requirements that few providers have fully mastered. Effective water management, redundancy planning, and workforce training become critical to ensuring reliability and safety. In parallel, the absence of consistent standards across chipmakers and cooling vendors complicates integration, as facilities must accommodate varied mechanical and fluid interfaces while maintaining long-term serviceability. Power availability further constrains growth: grid interconnect timelines often trail demand, and even where capacity exists, delivering stable, high-current power to individual racks remains a design challenge. Sustainability commitments compound these pressures, as operators must balance the energy intensity of AI workloads with renewable sourcing goals, water stewardship, and cost efficiency. Collectively, these factors redefine operational excellence and reshape the criteria for competitiveness in the data center industry.

“Frost & Sullivan commends the company for making Ingenuity the foundation of its global AI strategy. By combining modular flexibility with the ability to support industry-leading rack densities, Ingenuity enables customers to train and deploy AI at scale without sacrificing performance, resilience, or efficiency. This forward-looking architecture establishes the company as a trusted partner for organizations navigating the most demanding era of digital infrastructure.”

- Manuel Albornoz
Best Practices Research Analyst

Against this backdrop of escalating thermal, operational, and power complexity, Frost & Sullivan finds that EdgeConneX maintains a strong competitive position through its Ingenuity architecture. Ingenuity supports multiple cooling modes within each data hall, enabling operators to integrate diverse workloads and scale seamlessly from conventional deployments to high-density AI environments. In the United States, the company complements localized capacity near data sources with gigawatt-scale campuses dedicated to AI training, while international projects extend this model globally. Power strategies that combine renewable sourcing, on-site generation, and energy storage help overcome grid limitations and strengthen long-term sustainability performance.

EdgeConneX: Global Reach, Local Expertise, and a Proven Track Record

EdgeConneX delivers sustainable, scalable data center solutions with a clear focus on enabling next-generation AI and high-performance computing (HPC) workloads. Backed by EQT Infrastructure (part of the global investment organization EQT), the company serves industries including Cloud, AI, Content, and Networks with infrastructure tailored to specific location, capacity, and design requirements.¹ Its flagship Ingenuity platform reflects this mission, offering a flexible, future-proof architecture that supports the extreme power densities and diverse cooling needs of today’s AI and HPC deployments.

With more than 80 data centers across 59 markets in over 20 countries across the globe, EdgeConneX combines global reach with local expertise.² It partners with many of the world’s largest digital infrastructure providers, such as NVIDIA, Oracle, Vertiv, Schneider Electric, and other AI developers and providers, while continuously expanding its hyperscale and cloud customer base and strategic alliances.³ Building on a heritage of customized, build-to-suit projects for cloud giants and content providers, the company now focuses on building to density to meet the demands of AI at scale.

In 2021, Frost & Sullivan recognized EdgeConneX with the Competitive Strategy Leadership Recognition for the North American edge data center industry, honoring its ability to design and operate advanced facilities that support emerging technologies and evolving digital demands.⁴ In 2025, Frost & Sullivan remains impressed by the company’s continued leadership, particularly its ability to anticipate the infrastructure requirements of AI and deliver data centers that combine flexibility, resilience, and efficiency on a global scale.

¹ “EQT Infrastructure to acquire leading global data center provider EdgeConneX” (EdgeConneX website: <https://www.edgeconnex.com/news/press-releases/eqt-infrastructure-to-acquire-leading-global-data-center-provider-edgeconnex/>)

² “Empower Your Edge” (EdgeConneX website: <https://www.edgeconnex.com/>)

³ “We Work With Many Of The Largest Digital Infrastructure Companies In The World” (EdgeConneX website: <https://www.edgeconnex.com/>)

⁴ “EdgeConneX Lauded by Frost & Sullivan for Delivering a Full Spectrum of Data Center Solutions to Its Customers” (EdgeConneX website: <https://www.edgeconnex.com/news/press-releases/edgeconnex-lauded-by-frost-sullivan-for-delivering-a-full-spectrum-of-data-center-solutions-to-its-customers/>)

Ingenuity: AI-Ready Architecture for Extreme Density and Flexibility

Ingenuity is the company's next-generation data center platform, purpose-built for AI, HPC, and advanced cloud workloads. It marks a strategic evolution from build-to-suit projects into a build-to-density approach, enabling customers to scale with unprecedented power, cooling, and adaptability. Developed through years of collaboration with hyperscalers, chipmakers, and technology leaders, Ingenuity supports some of the highest-density deployments available worldwide, including large language model (LLM) training, GPU-intensive inference, and advanced research.

At its core, Ingenuity applies the concept of the "data center as a backplane." Each facility operates as a modular foundation that adapts to customer requirements across power delivery, density, and cooling. Data halls support a full spectrum of approaches—air cooling, rear-door heat exchangers, direct-to-chip, and the emerging immersion technologies of the future—allowing customers to select the optimal solution for each workload. This flexibility extends from conventional CPU racks at 10 kilowatts to GPU-driven deployments exceeding 600 kilowatts per rack, with a roadmap to 1 megawatt per rack and higher.

Ingenuity eliminates technology lock-in by integrating design features that maximize optionality. Reinforced slab-on-grade structures accommodate heavy, high-density racks, decoupled electrical systems provide scalable power delivery, and chilled water plants enable multiple liquid-cooling strategies. Programmable white space with higher ceiling clearances allows reconfiguration of power, piping, and connectivity as infrastructure evolves. Together, these elements ensure seamless refresh cycles without costly retrofits, keeping facilities aligned with new chip generations and server designs.

The platform also balances adaptability with long-term economic value. Pre-installed facility water infrastructure and compatibility across vendor ecosystems simplify integration, while long-term customer agreements provide stability for large-scale investment. Hybrid deployment models further enable cloud and AI configurations to run side by side, ensuring sustained relevance without overdesign or premature upgrades.

"Frost & Sullivan praises EdgeConneX for aligning its global expansion with the rapidly evolving demands of AI infrastructure. By combining large-scale capacity additions in strategic markets with the Ingenuity platform's flexibility to support future performance requirements, the company reinforces its position at the forefront of infrastructure innovation and ensures readiness to meet the most demanding AI and HPC workloads worldwide."

- Heena Juneja
Industry Principal

Close alignment with industry leaders strengthens Ingenuity's impact. The company works with chipmakers, server manufacturers, and standards bodies to align facility designs with next-generation hardware. Its role as an early NVIDIA DGX-certified partner, along with collaborations with neoclouds and hyperscalers, validates Ingenuity's readiness to scale the most demanding AI workloads.

Frost & Sullivan commends the company for making Ingenuity the foundation of its global AI strategy. By combining modular flexibility with the ability to support industry-leading rack densities, Ingenuity enables customers to train and deploy AI at scale without sacrificing performance, resilience, or efficiency. This forward-looking architecture

establishes the company as a trusted partner for organizations navigating the most demanding era of digital infrastructure.

Strategic Global Expansion to Support AI Growth

Between 2021 and 2025, the company accelerated its global footprint to meet surging demand for AI and cloud infrastructure. Ingenuity serves as the foundation of this expansion, enabling high-density deployments for LLM training, AI inference, and HPC. By combining its heritage in build-to-suit with a build-to-density approach, the company aligns new facilities with the evolving requirements of hyperscalers and AI providers worldwide.⁵

In Asia, a joint venture with Adani Enterprises established a Pan-India platform of large-scale, renewable-powered data centers supported by global training programs to maintain consistent standards. Southeast Asia expansion included scaling the Jakarta campus beyond 200 megawatts and announcing nearly 300 megawatts across Kuala Lumpur, Bukit Jalil, and Cyberjaya.^{6,7,8} In Japan, the company partnered with Kagoya Asset Management and Tatara R&D to develop a 250-megawatt campus in Kyoto-Osaka, while in China, it invested in Chayora to establish a presence in Beijing and Shanghai.^{9,10} In Europe, growth included new sites in Frankfurt and Barcelona, a full facility in Barcelona dedicated to LLM training, and continued scale at the Amsterdam campus. Dublin remains a strategic hub, where the company pioneered on-site natural gas power generation, an approach now replicated in other markets to mitigate grid constraints.¹¹

In the US, EdgeConneX shifted from broad coverage to targeted, gigawatt-scale campuses in Austin, Texas, New Albany, Ohio, Atlanta, Georgia and several other to be named markets. Each project addresses the unprecedented power requirements of AI workloads.¹² Backed by EQT Infrastructure, the company draws on substantial capital reserves to act decisively in a capital-intensive market, a clear advantage as supply chain challenges and power constraints intensify. While these hyperscale campuses provide the foundation for AI training, the company's hyperlocal platform continues to support distributed AI inference by placing capacity closer to data sources. Globally, EdgeConneX is expanding its infrastructure to support the unprecedented scale of AI training while also advancing their hyperlocal platform to meet localized AI inference demands.¹³

Furthering its commitment to skill development, EdgeConneX launched its state-of-the-art Global Training Center in Houston in April 2026 — a purpose-built, liquid-to-the-chip learning environment designed to bring learning closer to operations and standardize AI and advanced cooling training across its global workforce. Developed in collaboration with Salute, a leader in AI operations and comprehensive data center services, the facility focuses on three core areas: Operational and Technical Enablement,

⁵ Frost & Sullivan Interview with EdgeConneX (July 2024)

⁶ "AdaniConneX, a new Joint Venture formed Between EdgeConneX and Adani Enterprises, to Empower Digital India with a national platform of data centers" (EdgeConneX press release, February 2021)

⁷ "EdgeConneX Enters the Malaysia Market with Plans for Several Data Centers in Three Markets Offering Nearly 300 MWs of Capacity" (EdgeConneX press release, September 2023)

⁸ "EdgeConneX Acquires Adjacent Land at its Jakarta Hyperscale Data Center Campus" (EdgeConneX press release, December 2024)

⁹ "Global Data Center Leader EdgeConneX Unveils Plans for Japanese Market Entry" (EdgeConneX press release, January 2025)

¹⁰ "EdgeConneX® Makes Strategic Investment in Chayora as Global Market Development Focus Moves to China" (EdgeConneX press release, December 2021)

¹¹ Ibid.

¹² Ibid.

¹³ Ibid.

Workforce Development, and industry leadership. By closing the industry talent gap through immersive, real-world learning and embedding safety protocols into every aspect of its curriculum, EdgeConneX fosters a culture where operational excellence and innovation go hand in hand — accelerating readiness for the next generation of high-density, AI-driven infrastructure.

Frost & Sullivan praises EdgeConneX for aligning its global expansion with the rapidly evolving demands of AI infrastructure. By combining large-scale capacity additions in strategic markets with the Ingenuity platform’s flexibility to support future performance requirements, the company reinforces its position at the forefront of infrastructure innovation and ensures readiness to meet the most demanding AI and HPC workloads worldwide.

Collaborative Design for AI-Optimized Infrastructure

The company approaches infrastructure design with a focus on collaboration and precision, ensuring each facility aligns with the most demanding AI and hyperscale requirements. From the earliest planning stages, it works closely with technology leaders such as NVIDIA, Dell, SuperMicro, Vertiv, Schneider Electric and others to anticipate advances in AI hardware and architectures. In the absence of formal industry standards, the company sets its own benchmark through a living reference system that tracks more than 120 technical variables across deployments.¹⁴ This framework, embedded in the Ingenuity platform, translates customer-specific input into flexible, future-proof architecture for AI and HPC.

This commitment extends to operational boundaries. The company invests in clear “demarcation points” between facility and customer systems, particularly for liquid cooling, where maintenance and safety protocols must adapt to new risks. Deployments with neocloud partners illustrate how customized Service Level Agreements (SLAs) clarify responsibilities for fluid management and system oversight, enabling high-density AI workloads to run safely and reliably.

The precision-focused process also accelerates deployment timelines and reduces onboarding delays. By documenting customer preferences in areas such as power distribution, cooling, and rack densities, the company prevents overdesign, avoids unnecessary capital expenditure, and builds long-term trust. Through Ingenuity, this collaborative model delivers infrastructure that not only meets current AI requirements but also adapts seamlessly as workloads evolve.

Operational Readiness as a Competitive Advantage

The company views operational readiness as a defining strength that complements its Ingenuity architecture. In the era of AI and HPC, success depends not only on design but also on disciplined execution that ensures facilities operate safely, reliably, and at scale from day one. To achieve this, the company established a robust framework built on detailed planning, cross-functional coordination, and proactive risk management. A dedicated AI task force spanning engineering, construction, operations, and customer implementation continuously tracks evolving requirements and prepares each site for high-density, liquid-cooled deployments.

Fluid management illustrates the depth of this approach. The company addresses every technical detail, from quick-connect valve placement to strict sourcing and storage protocols for PG25 coolant, ensuring

¹⁴ Ibid.

consistency across facilities and preventing equipment damage. These measures extend into emergency response and maintenance procedures, reducing risks of downtime or injury while safeguarding high-value AI deployments.

Operational rigor is reinforced by a structured oversight framework. Digital planning tools and biweekly checkpoints track responsibilities, milestones, and readiness across global teams. This discipline becomes critical as partners such as NVIDIA advance next-generation architectures, requiring validation of designs and close vendor coordination for unprecedented density and complexity.

Frost & Sullivan highlights the company for transforming operational readiness into a competitive advantage. By combining oversight discipline, proactive risk mitigation, and close customer collaboration, the company delivers the reliability and execution strength required for the most demanding AI workloads. This holistic approach reinforces its position as a trusted partner in next-generation infrastructure.

Developing Talent and Building Sustainable Digital Economies

The company recognizes that the future of digital infrastructure depends as much on people as on technology. To strengthen the pipeline of professionals for AI and HPC, it launched an educational initiative designed to reach students across multiple grade levels and age groups. Through partnerships with [The Duke of Edinburgh's International Award USA Program](#) (Award USA) and Infrastructure Masons, the initiative connects young talent to technical education, mentorship, and real-world experiences, creating clear pathways from classrooms to careers in AI and cloud infrastructure. To keep learning engaging, the company also partnered with a Texas-based interactive STEM education provider to develop a curriculum covering computer science, AI, data center operations, and sustainability practices, with plans to expand from the United States to Southeast Asia and Europe.¹⁵

This focus on talent development is matched by a disciplined approach to operational growth. The company shifted from regional expansion to a synchronized global model, transferring best practices across its portfolio. Precast construction methods pioneered in Malaysia accelerate worldwide deployments, while lessons from natural gas power generation in Ireland support markets with grid limitations. A formal training academy prepares new employees in complex regions, immersing them in proven practices at established sites before applying standards locally. This approach allows the company to maintain incident rates well below industry thresholds while deploying hundreds of megawatts annually.

To sustain this pace, the company applies proactive supply chain management. It secures critical components such as steel and specialized fluids well in advance, balances procurement across markets, and uses flexible contracts to mitigate geopolitical and tariff risks. Its execution speed has positioned it as a trusted partner, with hyperscalers and property owners frequently seeking joint ventures or project takeovers to leverage its delivery expertise.

Frost & Sullivan applauds the company for preparing comprehensively for the next wave of AI infrastructure. By combining the Ingenuity platform with proactive talent development, operational

¹⁵ Frost & Sullivan Interview with EdgeConneX (July 2024)

discipline, and global knowledge transfer, it reduces risk, maximizes customer value, and enables infrastructure to scale at the pace AI and HPC workloads demand. This dual commitment to technology and people positions the company as a long-term leader in digital infrastructure and a trusted partner for the AI era.

Conclusion

EdgeConneX distinguishes itself as a global leader in artificial intelligence (AI)-optimized and scalable infrastructure by uniting its Ingenuity platform with strategic expansion, collaborative design, and disciplined execution. Ingenuity enables future-proof data centers that adapt seamlessly to evolving requirements in AI, HPC, and advanced cloud workloads. Its ability to anticipate market shifts, align with customer strategies, and execute at gigawatt scale is reinforced by advanced cooling and power solutions, rigorous readiness frameworks, and proactive supply chain management. Beyond technology, the company invests in talent development and community engagement, cultivating a skilled workforce and supporting sustainable growth in the digital economies where it operates. With a proven track record, strong industry partnerships, and the agility to scale infrastructure at the pace of global innovation, the company is uniquely positioned to meet the most complex demands of the AI era and deliver lasting value to its customers worldwide.

For its strong overall performance, EdgeConneX is presented with Frost & Sullivan's 2025 Global Technology Innovation Leadership recognition in the AI High-Density scalable infrastructure industry.

What You Need to Know about the Technology Innovation Leadership Recognition

Frost & Sullivan's Technology Innovation recognizes the company that has introduced the best underlying technology for achieving remarkable product and customer success while driving future business value.

Best Practices Recognition Analysis

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

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

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™.

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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)**

