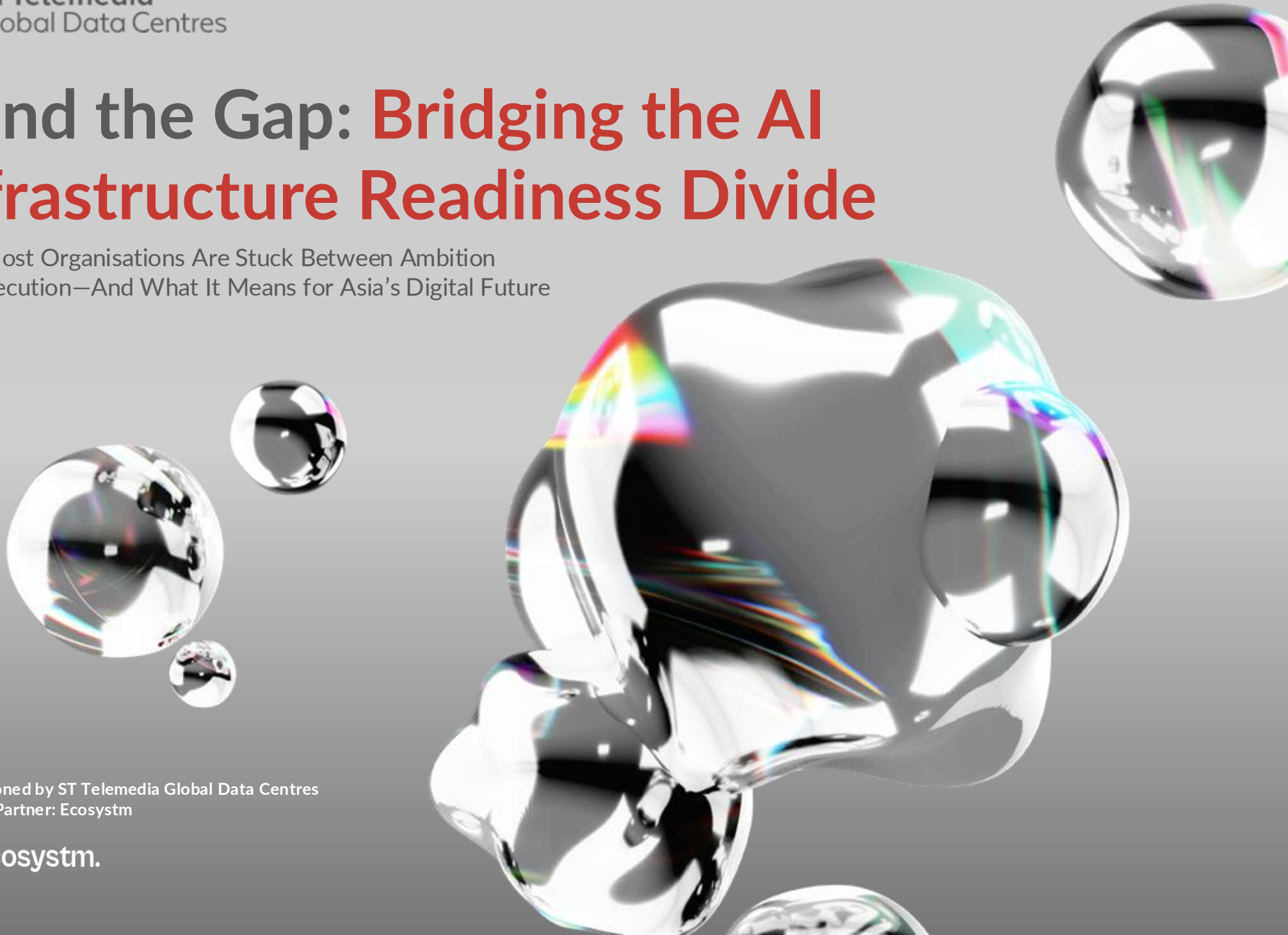
STTelemedia
Global Data Centres

Mind the Gap: Bridging the AI Infrastructure Readiness Divide

Why Most Organisations Are Stuck Between Ambition and Execution—And What It Means for Asia's Digital Future



Commissioned by ST Telemedia Global Data Centres
Research Partner: Ecosystm

ecosystm.

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Executive Summary

As organisations in Asia move beyond the initial rush to deploy AI, many are encountering significant roadblocks to their ambitions of transforming operations and generating
new revenue streams.
Getting AI right, as many are discovering, requires getting crucial foundations in place. In the race for the global US$1 trillion AI opportunity[1], the core challenge for the region's organisations is no longer about vision but about execution and infrastructure readiness.

While 90% of organisations have embarked on their AI journeys, a substantial 71% remain stalled in the 'Building' phase, struggling to scale their solutions to achieve measurable return on investment (ROI) due to foundational infrastructure gaps and talent deficits. This widening gap between AI ambition and infrastructure reality represents the central paradox organisations must urgently address.

To strengthen AI adoption, Asian organisations must progress up the AI infrastructure maturity scale across critical parameters for their digital infrastructure. Success depends on deepening efforts in strategic alignment and ambition, organisational readiness, data governance and compliance, and most critically, AI infrastructure as a fundamental building block.

This report offers more than a market overview. It provides a practical guide for organisations to understand their current AI infrastructure maturity, benchmark themselves against industry leaders , and create a roadmap to advance up the AI infrastructure maturity ladder. By doing so, they can realise their ambition to become modern, AI-powered organisations prepared for the future.

Methodology
Commissioned by ST Telemedia Global Data Centres (STT GDC) with research partner Ecosystm, the *AI Infrastructure Readiness Study* underpins this report. Drawing on insights gathered in 2025 from over 600 professionals across nine Asian countries, spanning diverse sectors such as banking, manufacturing and government, the findings represent a robust cross-section of the market, with half of respondents working in enterprises exceeding 1,000 employees.

[1]Powering the AI Era | Goldman Sachs

The State of AI Infrastructure Readiness in Asia

Despite ambitious goals for revenue growth and innovation, AI infrastructure readiness across Asia region is fundamentally stalled. Notably, only 16% of organisations have an operational AI strategy with robust infrastructure and governance. An even rarer 1% have AI fully embedded in their business, supported by optimised, resilient and sustainable infrastructure. Together, these "Integrators" and "Leaders" represent future-ready organisations that form the vanguard of regional AI adoption.

Most Asian organisations occupy the middle ground, ambitious in their AI vision yet lacking the infrastructure foundation to execute effectively[2]. This "stuck majority" comprising 71% of organisations represents where growth has stalled across the region. These organisations find themselves caught between proofs of concept and production value, trapped in a self-reinforcing Catch-22 cycle.

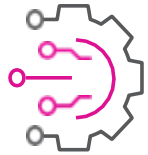
Across the region, 56% of organisations face budget constraints and struggle to measure AI ROI, while also lacking the infrastructure to scale promising AI pilots into production. This deployment gap prevents clear ROI from emerging, perpetuating the cycle. Breaking this cycle will be crucial to unlocking AI's measurable value.

Organisations in the Leader and Integrator categories are far more likely to unlock unexpected value and innovation from their AI deployments, with 72% reporting success compared with just 34% of organisations still in the Building stage. This highlights the impact of backing AI ambition with sustained infrastructure investment.

[2]Modelled based on responses to multiple questions

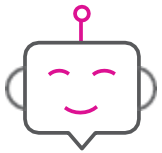
How organisations in Asia are stacking up in terms of AI infrastructure readiness.

12%
Explorers



71%
Builders

16%
Integrators



1%
Leaders

AI is driven at two speeds across Asia

Asia's diversity manifests in divergent approaches to AI readiness. Rather than moving at a uniform pace, the region is splitting into two distinct tracks. Mature markets are leading the way, while emerging markets have an opportunity to start on a clean slate, bypass legacy constraints and leapfrog established players.

The fast track: mature markets

A cluster of leading countries have accelerated the pace in AI readiness. Singapore, Japan and South Korea lead with strong operational and regulatory maturity, scoring highly on AI readiness assessments. These markets excel in strategy development, governance formalisation and building organisational readiness. Singapore, for example, leads the region with strong public-private partnerships, supported by robust governance and talent pipelines such as its National AI Strategy (NAIS) 2.0[3].

Yet, these leaders face their own challenges. Singapore, notably, confronts land constraints and energy capacity required to support explosive growth in high-density AI training. This limitation has compelled the country to explore expansion beyond areas where data centres would traditionally be located. Japan and Korea both face challenges of their own, including those related to energy supply and talent.

[3]National AI Strategy | Smart Nation Singapore

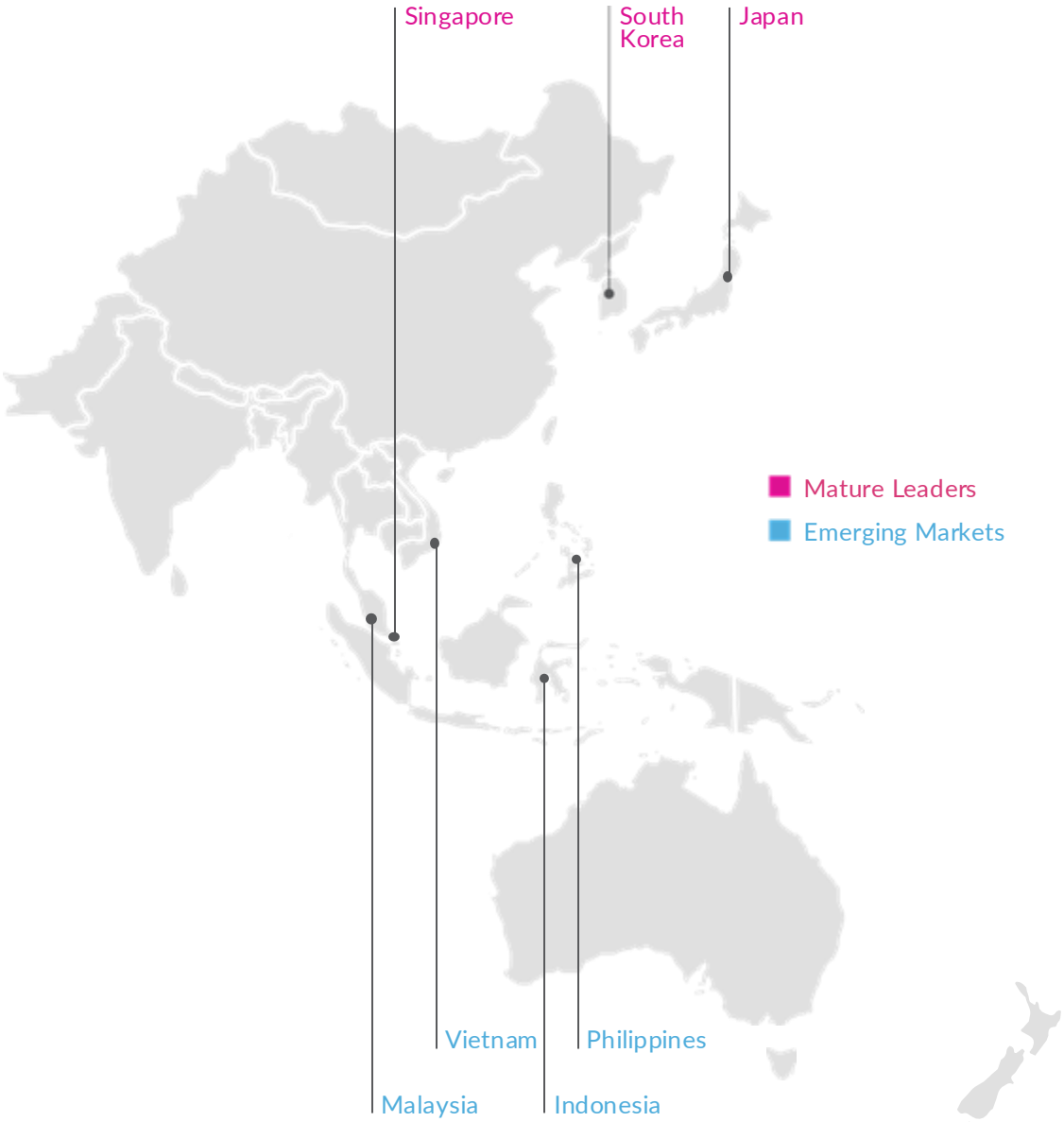
The opportunity track: emerging markets

Emerging markets including Malaysia, Indonesia, the Philippines and Vietnam lack the head start of their faster-moving regional counterparts, yet they stand at the cusp of a transformative opportunity to join the more established market as leaders.

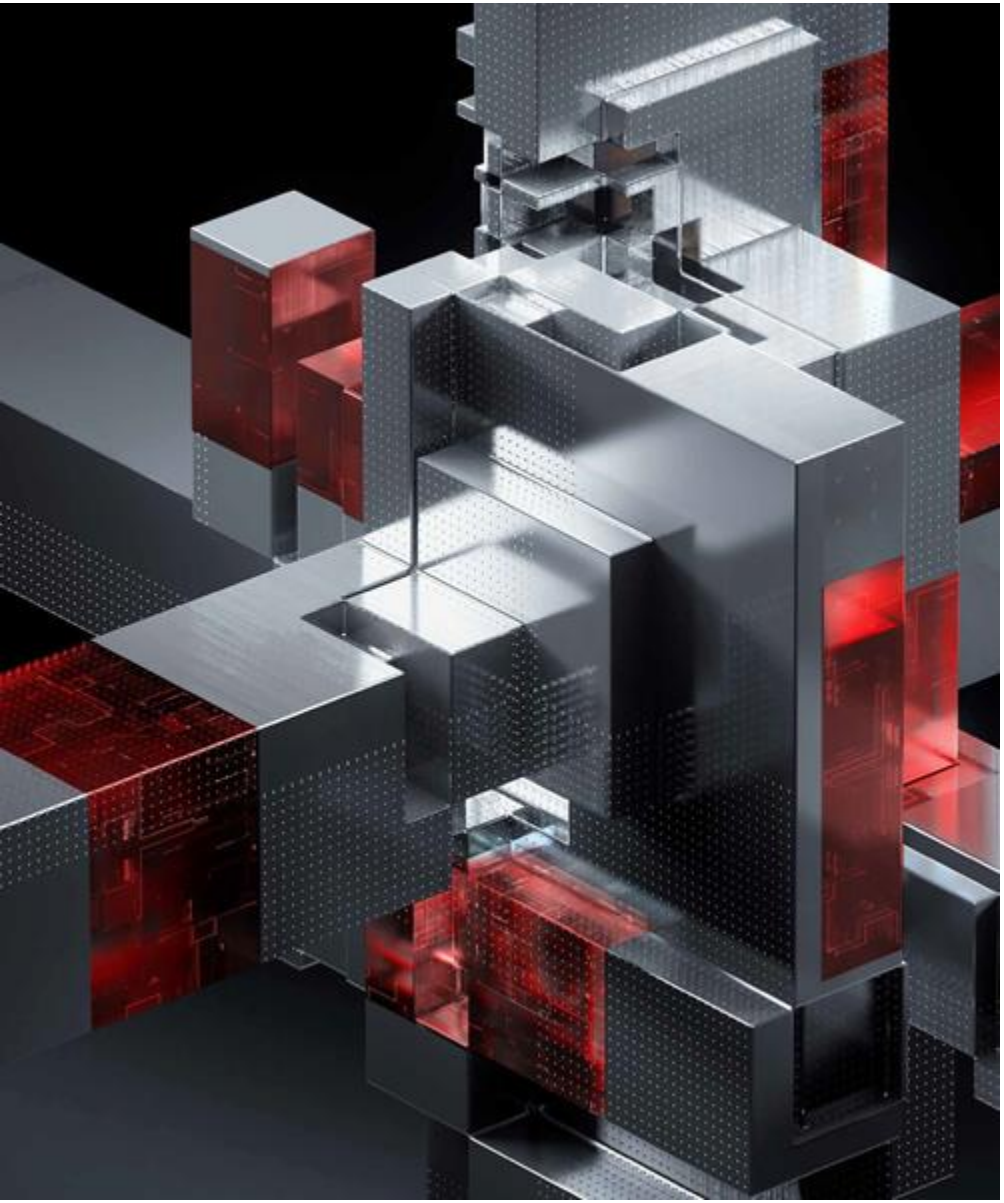
By partnering with specialised providers, organisations can overcome infrastructure limitations and talent shortages to build AI at scale; this strategy is just as critical for supporting infrastructure needs in mature markets as it is for emerging ones.

Growing technical expertise and refined governance will be essential to this endeavour. Malaysia demonstrates this potential. Possessing the land, power and capacity that Singapore lacks, Malaysia has successfully complemented Singapore's AI expansion within Johor state, which borders Singapore. Similarly, Indonesia is emerging as a critical player; with strategic zones like the Nongsa Digital Park in Batam and vast renewable energy potential, it offers a strategic near-shore hub that further alleviates the region's infrastructure capacity crunch.

Each group holds complementary strengths that addresses the other's capacity constraints, though each must navigate specific challenges. The dynamic relationship between these two clusters, and how it evolves, will determine strategic AI workload deployment across the region in the coming years.



AI Ambition Meets Infrastructure Reality



Expectations for AI across Asia are high, driven by the prospect of investments that could radically transform organisations. 72% expect moderate to exponential growth of AI workloads over the next three years. This accelerating pace demands appropriate AI-ready infrastructure, yet most organisations lack it and traditional data centres across Asia cannot provide it.

AI workloads demand higher power density, advanced cooling capabilities, and ultra-fast networking, requirements that require significant infrastructure upgrades. Unfortunately, organisations are attempting to purchase AI readiness through hardware investments alone; 64% prioritise GPU acquisitions. At the same time, they overlook other infrastructure-related gaps and critical operational expertise, both causing AI initiatives to falter:

Key Infrastructure deficits

Compute and storage deficit:

Among organisations surveyed, 49% report insufficient compute capacity for AI workloads, with only 7% having adequate headroom for complex AI applications and adoption growth. Similarly, 53% acknowledge inadequate storage, while an additional 28% cite future scalability as a concern.

Networking limitations:

Data transfer constraints throttle model training and inferencing. 82% of Asian organisations report network bottlenecks, latency issues, or insufficient optimisation for high-demand AI workloads, while only 7% have high-performance, low-latency networks capable of supporting such applications.

Location readiness:

Distributed AI is essential for delivering superior user experiences to users as well as meeting data residency and sovereignty requirements. Yet, 83% of Asian organisations report that fewer than half of their IT locations are AI-ready.

Resolving these infrastructure constraints extends beyond simple technology acquisitions or reactive hardware investments without coherent strategy. To address the fundamental constraints limiting AI success, Asian organisations must overcome the following critical roadblocks:

Insufficient budget for exponential growth

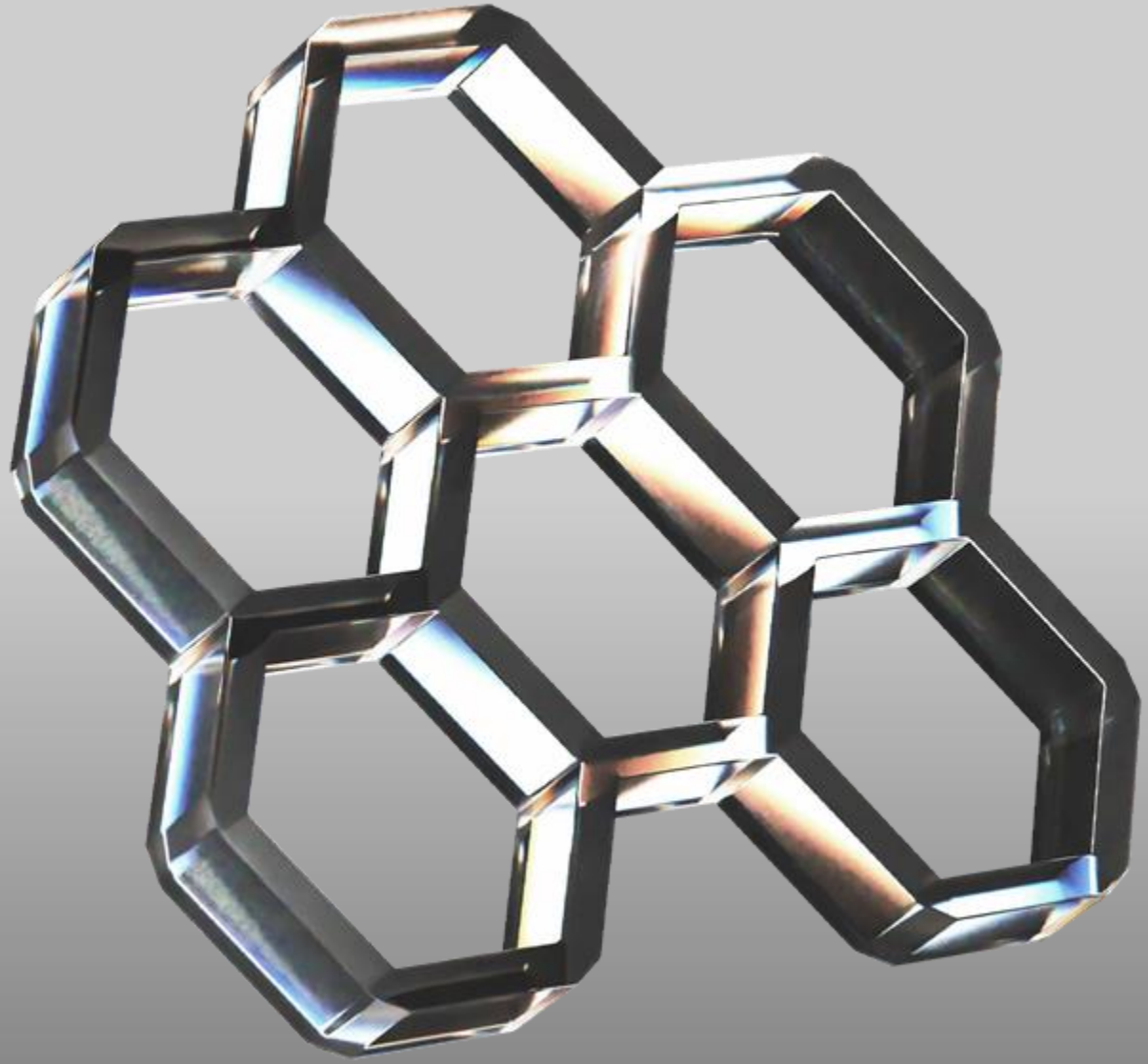
Organisations are attempting to fund exponential AI scaling with incremental budgets. While 72% expect moderate to significant AI workload growth over the next three years, financial commitment has not kept pace. 72% of organisations invest less than 5% of their IT budget in AI, creating severe capital constraints. Consequently, 42% of organisations explicitly struggle to scale infrastructure rapidly enough to meet demand, demonstrating that in-house builds are becoming unsustainable.

Infrastructure build lags behind innovation

A critical execution deficit persists. With 91% of organisations planning multi-location deployments, they face build cycles of 12–18 months. In contrast, AI hardware cycles (GPUs, networking) evolve rapidly and continuously, creating the risk of obsolescence where infrastructure becomes outdated before deployment.

Lack of operational expertise

While the data science talent shortage is significant (56%), an overlooked operations gap is equally undermining AI infrastructure readiness. Some 52% of organisations lack in-house expertise to manage complex AI infrastructure; conversely, only 9% claim to have robust internal AI talent. Unlike data science roles, deep operational expertise for high-density environments is difficult to develop quickly, forcing organisations to choose between stalling progress or partnering with specialised providers. For many, partnering with a trusted infrastructure specialist represents a more viable strategy than attempting to build, staff, and manage everything internally.



What the Future-ready Organisations Are Doing Right

The challenges highlighted in this study are not unique to Asia; however, they underscore the imperative to align ambition with execution to realise AI objectives. For Asian organisations to join the 17% **of future-ready organisations** — those actively integrating or leading in AI adoption — they must shift focus from transactional, short-term fixes to a strategic, holistic approach.

Five strategies of AI-ready winners

1

They partner instead of building

Rather than developing everything themselves, winning organisations today collaborate with specialised partners to get ahead. This approach grants access to scarce infrastructure and expertise while reducing time-to-deployment from 12-18 months to 3-6 months.

A critical secondary benefit is the conversion of capital expenditure (CAPEX) into predictable operational expenditure (OPEX).

2

They leverage distribution instead of centralisation

Successful AI adopters distribute AI workloads geographically across the region's data centres. Indeed, 45% employ such strategies, according to this study.

This distribution addresses sovereignty, latency and resilience concerns while enabling regional expansion without requiring infrastructure from scratch.

3

They design for sustainability instead of retrofitting

As densely packed AI data centres consume increasing power and water, organisations must urgently improve their environment and community impact. Enhanced efficiency also reduces cost. These two imperatives go hand in hand, as winning organisations in the study demonstrate. They are five times more likely to make sustainability central to infrastructure decisions.

Designing sustainability into the AI infrastructure early avoids costly retrofits later and mitigates regulatory or reputational risks.

4

They measure holistically

Winning organisations go beyond traditional key performance indicators (KPIs). 61% measure operational efficiency gains, while 65% track customer experience metrics. Additional indicators might include innovation impact and regulatory compliance achievements.

These broader metrics justify infrastructure investment even before traditional ROI materialises.

5

They have moved beyond transactional thinking into strategy

Winning organisations have moved beyond transactional thinking, evaluating providers strategically through fundamentally different questions:

- Can this partner bridge our internal expertise gap
- Will they help us scale quickly and globally?
- Do they bring operational excellence, not merely space and power?

When organisations purchase AI infrastructure, they acquire more than racks and kilowatts. They procure the operational talent necessary to run complex, high-density AI workloads. Recognising this hidden value in strategic partnerships distinguishes organisations that simply build AI from those truly succeeding.

What organisations want versus what they need

selecting the right partners to deploy capable digital infrastructure is critical. A fundamental disconnect exists between how organisations evaluate infrastructure providers, and the operational capabilities required for successful AI deployment. This gap frequently leads to decisions that undermine long-term success.

Evaluating for baseline criteria

When organisations assess colocation providers, their stated priorities, though important, often focus on baseline criteria:

Security:

51%

Reliability:

51%

Connectivity:

45%

These represent table stakes; every credible provider already delivers on basic security, reliability, and connectivity. By prioritising these elements, organisations evaluate differentiated, specialised infrastructure using only baseline criteria, neglecting the factors that truly enable high-performance AI at scale.

The hidden operational needs

Examining organisations' actual operational challenges reveals often overlooked requirements:

Specialised AI expertise: While 52% lack in-house expertise for complex infrastructure, only 14% prioritise this when evaluating providers.

Scalability capability: 42% struggle with scaling to meet AI demands, yet only 36% prioritise scalability in evaluation criteria.

Sustainability: A significant 52% lack necessary cooling strategies for sustainable AI operations, but merely 9% prioritise sustainability when selecting partners.

This mismatch underscores the disadvantages of the transactional approach, explaining subsequent operational struggles. Low-cost solutions become expensive when insufficient talent exists to run complex systems effectively.

The Strategic Partnership Advantage

Given the extreme cost, complexity, and specialised skills required for modern AI, **outsourcing infrastructure** represents the most financially and operationally sensible solution for most organisations. Running modern AI infrastructure demands fundamentally different skills from traditional IT, requiring expertise in:

- **Managing high-density cooling systems** to prevent both CPUs and GPUs overheating.
- **Optimising specialised hardware performance** for AI workloads.
- **Orchestrating complex hybrid cloud environments.**
- **Implementing AI for IT operations and automation** for energy efficiency and maintenance at scale.

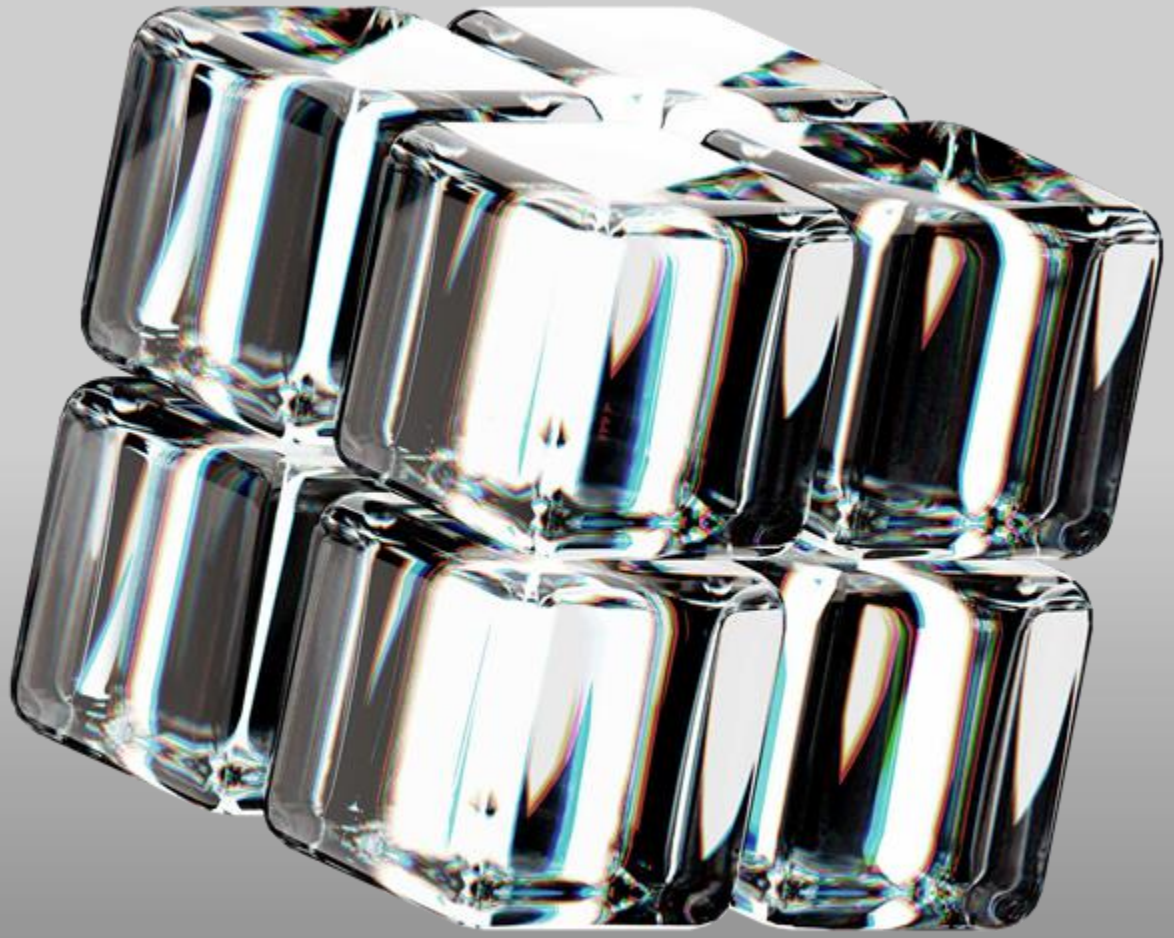
Hiring a handful of specialists to address expertise gaps is not enough for mission-critical infrastructure. Instead, this requires an entire **operations team** with expertise is in scarce supply. Such talent proves difficult to attract and retain when competing against hyperscalers and specialised AI infrastructure providers.

The Solution: Offload Technical Deficit

Rather than undertaking the monumental challenge of building and operating a specialised facility, organisations should engage **specialised colocation providers**. This strategic partnership enables them to:

1. **Offload technical deficit immediately** without incurring heavy technology investments to catch up on years of evolution. This allows organisations to access cutting-edge AI hardware and capabilities swiftly.
2. **Access high-density capacity** without the enormous cost and complexity of a self-build: Beyond hardware costs, identifying and recruiting expertise capable of operating AI infrastructure effectively represents a significant challenge even for large enterprises competing against hyperscalers and AI-focused companies innovating at unprecedented pace.

When investing in an infrastructure partnership, organisations should look beyond purchasing space and power. They are, in fact, acquiring the **expert talent and operational supply chain** required to run sophisticated, high-density AI infrastructure successfully.



Three Questions Every Organisation Must Answer

The challenges discussed—capacity shortfalls, expertise gaps, and strategic planning—distil into three fundamental questions. Organisations currently winning with AI have answered these, positioning them ahead in the race to production value.

I. WHERE should AI run?

The answer isn't "wherever deployment costs least," but rather "where data resides, regulatory compliance applies, and low latency and performance prove critical". For many Asian organisations, this mandates a distributed strategy. With 67% of organisations affected by data sovereignty regulations and 31% prioritising data locality for latency and performance, location proves critical.

For the 91% planning multi-location deployment, the optimal strategy is not about choosing between markets, but leveraging a unified platform that spans both mature and emerging markets:

- **Mature Markets:** Offer deep connectivity ecosystems and proximity to financial and business hubs for immediate data processing.
- **Emerging Markets:** Provide the scale and power headroom necessary for growth, without compromising on technical standards or connectivity.

Have you mapped your workloads to these optimal locations, or are you defaulting to existing infrastructure? Organisations must carefully evaluate their options.

II. HOW should AI be deployed?

While organisations pursue optimal economics, increasingly leveraging dedicated infrastructure for both enterprise model training and inference workloads, execution remains challenging. Currently, 46% face both high capital and operating expenditures managing their own infrastructure. Additionally, 42% struggle to scale, requiring more flexible, rapid deployment.

The target state is a hybrid-by-design approach using specialised infrastructure partners to deliver AI-ready capacity without the capital burden or typical 12-18 month build cycles.

III. WHO Will Run Your AI Infrastructure?

This is where the talent gap becomes most acute. With 43% citing talent shortages as a key barrier and 52% lacking specific internal expertise to manage complex infrastructure, a critical bottleneck has emerged.

Since closing this gap through hiring alone often proves too slow and expensive, the winning strategy is forming strategic partnerships. This approach combines an organisation's domain expertise with a provider's operational excellence — essential because incorrect infrastructure strategy risks failure for even the strongest AI vision.

Unlocking the Full Value of AI

The Vision

Unlocking economic transformation and regional prosperity

If Asia successfully bridges the infrastructure divide, the region will unlock extraordinary economic potential.

Mature markets like Singapore, leveraging their governance expertise, will anchor the region's AI ecosystem, while emerging markets possessing abundant land, power and cost advantages — will provision high-density capacity for regional and global AI training and inference. This complementary dynamic will spawn a hyper-connected digital infrastructure ecosystem spanning Asia, positioning the region as a critical node in the global AI supply chain.

Jobs, skills and human capital

Data centre operations, AI infrastructure management and related technical fields will experience dramatic employment growth. The data centre sector will catalyse skills development and professional advancement across the region, attracting global talent and strengthening Asia's competitive position in the global digital economy.

Distributed resilience and sovereignty

By distributing AI workloads across sovereign, distributed infrastructure, Asian organisations will meet regulatory requirements while building resilient systems less vulnerable to geographic or geopolitical disruption. This distributed model will enable organisations to maintain regulatory compliance, ensure data sovereignty, and deliver ultra-low latency services to their users — a compounding competitive advantage as AI becomes embedded in critical services.

Sustainable digital transformation

Winning organisations designing sustainability into AI infrastructure from inception — through liquid cooling systems, renewable energy integration, and operational efficiency — will avoid costly retrofits and establish themselves as environmental stewards. This virtuous cycle will further strengthen regulatory confidence and attract ESG-focused investment capital into Asia.

The Cost of Inaction: Deepening inequality and development divergence

Failure to bridge the infrastructure gap will entrench a two-tier divide. Mature markets will advance while emerging economies stagnate, amplifying inequality and widening development gaps. Research indicates AI risks creating a "new era of divergence" where technology leaders extend advantages while laggards fall further behind[4]. For emerging markets, this could mean missing a generational opportunity to leapfrog legacy systems and compete globally.

Talent drain and brain drain acceleration

As infrastructure-ready mature markets attract AI talent and investment, emerging markets will face accelerating brain drain. Without robust AI infrastructure, regional organisations cannot attract or retain top technical talent, creating a self-reinforcing cycle of capability erosion and competitive disadvantage.

Missed economic opportunity

By 2030, each year of delay in infrastructure development compounds the opportunity cost. Organisations unable to deploy AI at scale will lose competitive ground to more prepared rivals, potentially ceding entire markets and revenue streams. For the region collectively, this represents billions in foregone productivity, innovation and economic growth.

Jobs displacement without transition

Unlike a managed transition where skills development parallels AI adoption, rapid AI deployment without infrastructure readiness and workforce preparation creates dislocation — particularly for women, who face twice the displacement risk from automation[5]. Without deliberate policy and infrastructure investment supporting upskilling, AI could amplify unemployment and social inequality rather than creating broadly shared prosperity.

Energy security and sustainability risks

Organisations rushing to deploy AI infrastructure without sustainability considerations will face mounting energy demands that strain regional power grids. Ad hoc, retrofitted infrastructure will prove far more energy-intensive than purpose-built systems, potentially jeopardising Asia's decarbonisation commitments and burdening communities with environmental externalities .

Regional digital resilience and control

Without a resilient, distributed base of AI-ready infrastructure across Asian markets, organisations risk concentrating critical workloads in a narrower set of environments, limiting their options for how and where these workloads are run. This concentration can heighten exposure to external regulatory and operational shifts and make it harder for the region to shape and safeguard its long-term digital, economic and security priorities on its own terms[6].

[4]UNDP Asia-Pacific. (2025). AI risks sparking a new era of divergence as development gaps between countries widen. https://www.undp.org/asia-pacific/press-releases/
[5]Channel NewsAsia. (2025). AI boom could widen inequality worldwide, with Asia most at risk. https://www.channelnewsasia.com/asia/ai-artificial-intelligence-asia-risk-widen-inequality-automation-5527671
[6]ASEAN Energy. (2025). The rise of data centres, artificial intelligence and ASEAN's decarbonisation goal. https://accept.aseanenergy.org/the-rise-of-data-centres-artificial-intelligence-and-aseans-decarbonisation-goal/

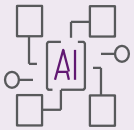
Unlocking the Full Value of AI.

For many organisations in Asia, the AI journey has begun, yet roadblocks threaten progress. Successfully scaling AI requires holistic transformation, progressing beyond the pilot-driven 'Building' stage to the production-ready 'Leading' status.

This fundamental shift demands synchronised mandates spanning from C-suite strategy to operational planning, coupled with concerted action from private and public stakeholders across the region to overcome the current infrastructural and operational bottlenecks. Only through coordinated effort can economies fully realise the value of AI.

Making the Strategic Shift

Businesses must transition from reactive spending to proactive, specialised investment. To join the **17%** capable of scaling AI, rather than remaining among the **71%** trapped between pilots and production, leaders must act on three fronts:



Strategic shift from ad-hoc to planned AI

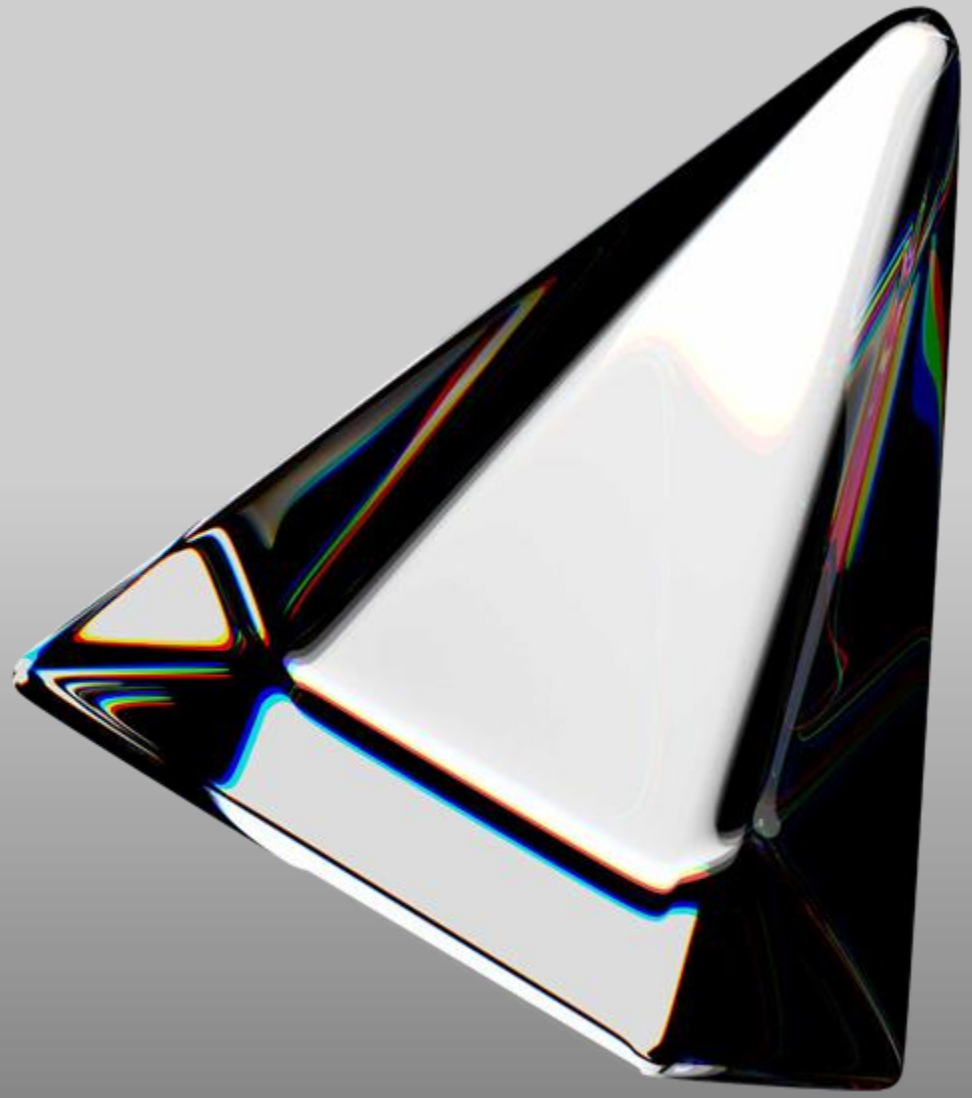
Organisations must abandon reactive spending and adopt formal AI technology adoption roadmaps. Currently, too many organisations evaluate partners using baseline criteria like basic connectivity or price-per-rack, ignoring the strategic differentiation essential for AI. Investment must shift toward purpose-built AI hardware and partners capable of delivering "AI-readiness" rather than merely floor space.

Optimise execution & resource management

The talent and capacity gap demands immediate action. With organisations lacking internal expertise for complex infrastructure and struggling to scale rapidly, attempting everything in-house creates a bottleneck. The most effective path to scale leverages strategic partnerships. By outsourcing capacity and operations to specialised providers, organisations immediately bridge expertise gaps immediately while cultivating internal talent over time.

Futureproofing for competitive advantage

Organisations should integrate long-term considerations into infrastructure decisions from the outset. Currently, 52% lack necessary cooling strategies for sustainable operations, yet only 9% prioritise sustainability when selecting partners. By embedding sustainability goals and cost management strategies early, organisations avoid the trap where low initial costs balloon due to inefficiencies later.

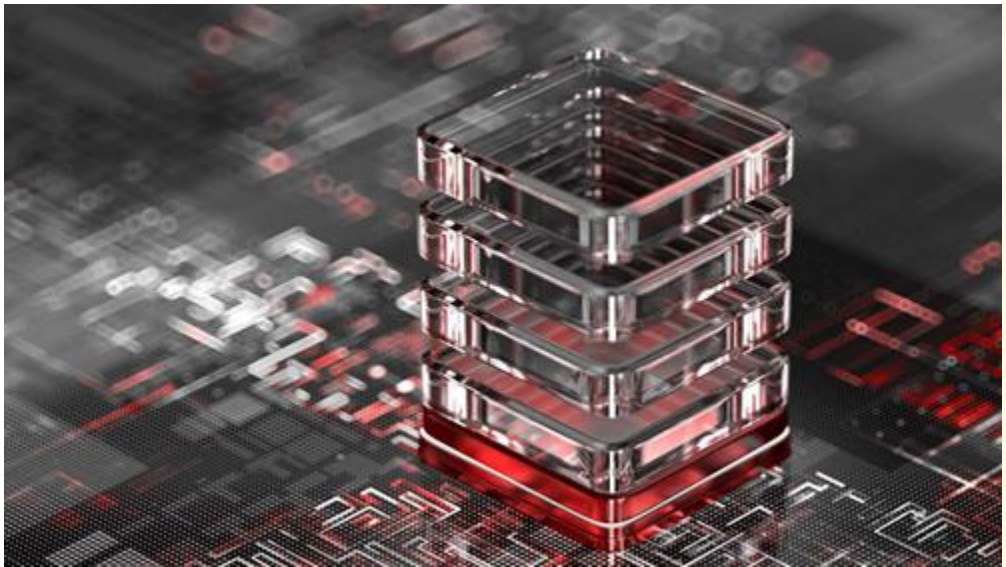


The Way Forward

As organisations pursue real-world AI results, the era of experimentation rapidly yields to a mandate for scalable, production-grade execution. Today's inertia does not reflect a failure of vision but a failure to invest strategically in the operational and physical foundations required for production AI.

For organisations seeking to reach the highest 'Leading' tier of AI-readiness, the imperatives are clear:

- **Infrastructure is a strategic differentiator:** No longer a back-office IT consideration, it is a strategic asset defining competitive advantage.
- **The "Build vs. Partner" decision:** This choice determines whether you remain among the struggling 71% or join the scaling 17%.
- **ROI depends on readiness:** Pilots fail without production-grade foundation.
- **Geographic distribution is essential:** Multi-location strategies are now prerequisites for compliance, resilience and growth.



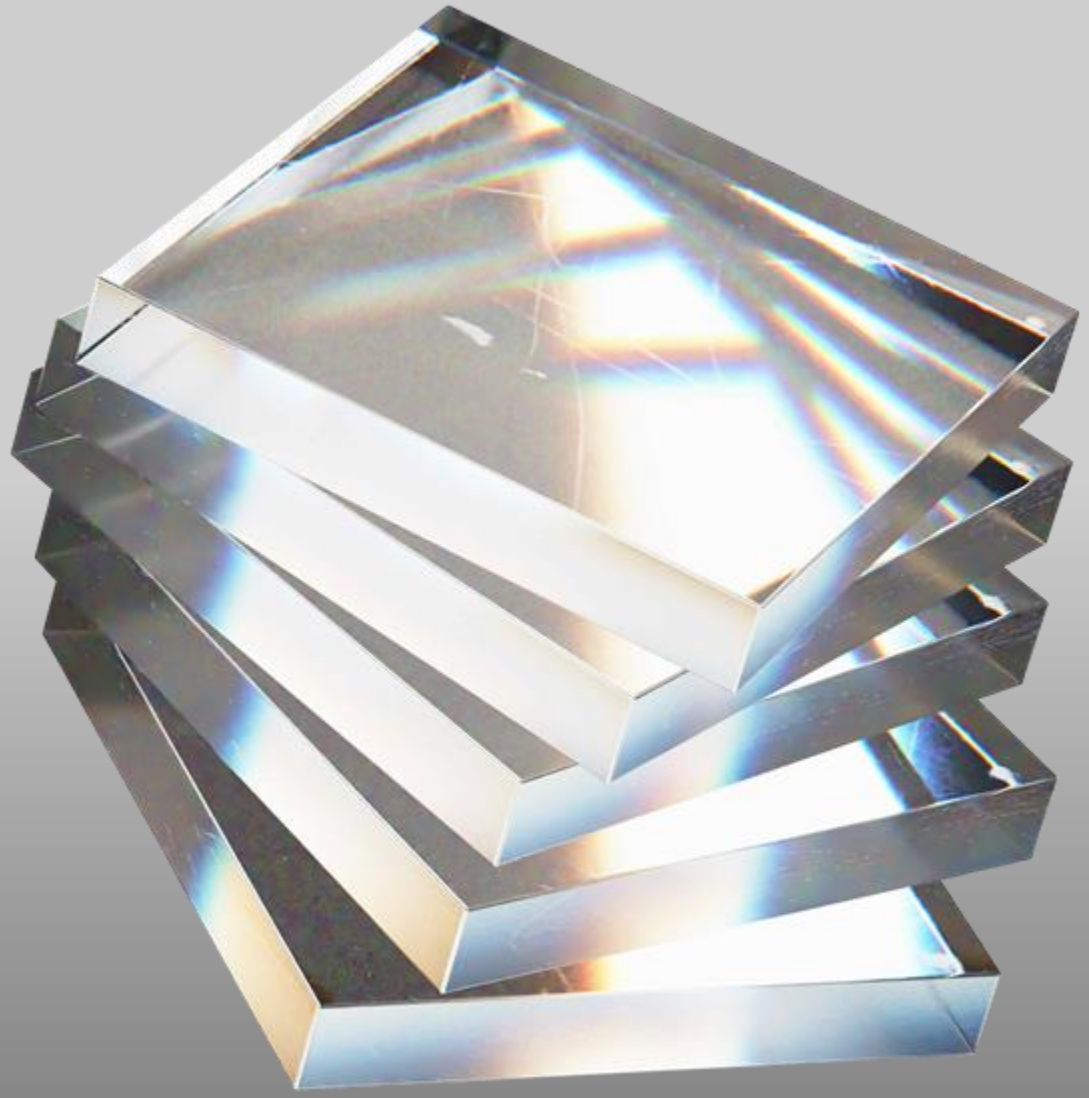
Policy Imperatives

Policymakers play a vital role in enabling regional AI success. Critical shifts warranting policy guidance include:

- **The readiness gap:** The disparity between mature and emerging markets requires policy intervention to ensure equitable growth.
- **Multiplier effects:** Future-ready organisations generate unexpected value; policy should encourage high-density infrastructure investment.
- **Harmonisation:** Data sovereignty frameworks require alignment across Asia to enable seamless regional AI operations and strengthen the region's competitive advantage.
- **Sustainability standards:** AI infrastructure standards should be mandated before retrofit costs become prohibitive, securing environmental commitments and cost efficiency at the same time.

Today, the infrastructure debate has migrated from the back-office to the C-suite. Tomorrow's leaders will be those recognising that infrastructure required to scale AI represents a specialised strategic asset, not a commodity expense.

By immediately embracing specialisation through partnership, Asian organisations can close the gap between ambitious AI vision and challenging infrastructure reality. The present moment will determine winners and losers in Asia's AI race. The time for action is now.



About This Report

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Commissioned by ST Telemedia Global Data Centres (STT GDC) with research partner Ecosystm, the *AI Infrastructure Readiness Study* forms the foundation of this report.

The AI Infrastructure Readiness Study evaluated organisational infrastructure preparedness for AI adoption and workloads. Unlike traditional IT maturity models emphasising general technology adoption, this assessment specifically examines purpose-built infrastructure capabilities required to successfully deploy, scale and sustain AI systems workloads.

Organisations were assessed across five key pillars:

Strategic Alignment & Ambition	Organisational Readiness	Data Governance & Compliance	Current Digital Infrastructure	Future AI Infrastructure Planning
How deeply AI is embedded in an organisation's strategy, including the clarity of its vision and stage of adoption, as well as how it drives innovation, delivers impact, and generates unexpected value that strengthens competitive advantage.	How prepared an organisation is for AI adoption, including its culture around data-driven decision-making, leadership support, internal AI talent capacity, and the effectiveness of upskilling initiatives to build future-ready skills.	How effectively an organisation governs and protects its data for AI, including data governance maturity, confidence in privacy safeguards, approaches to bias and fairness, and the strategic imperative for distributed data practices.	How well an organisation's digital infrastructure supports AI, enabling scalable, integrated, and efficient compute, storage, and network operations while ensuring data consistency and energy-efficient performance.	How prepared an organisation is to scale its AI infrastructure for future growth, high-performance demands, and sustainable, resilient operations across geographies.

Scores were normalised and aggregated across all criteria to calculate final scores, placing organisations into one of four distinct AI Infrastructure Readiness maturity stages: Exploring AI, Building AI, Integrating AI, or Leading AI.

AI Infrastructure Readiness Maturity Stages

Exploring AI

AI initiatives are ad-hoc and exploratory; infrastructure lacks basic support, and efforts are hindered by talent deficits and fragmented governance. Much of the focus is on establishing a basic AI vision and understanding infrastructure gaps.

Building AI

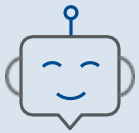
A broad AI vision is documented, and initial operational solutions are deploying. Infrastructure is sufficient for current needs but requires better integration and formalisation of data governance. The focus is on scaling talent and basic compute.

Integrating AI

AI is a core driver; infrastructure is robust, scalable, and optimised for high-demand workloads, enabling seamless deployment. The focus is on optimising performance, scalability, and achieving regulatory confidence.

Leading AI

AI is fully embedded, transforming business models, and driving market leadership. The infrastructure is hyper-optimised, highly resilient, and proactively managed for sustainability. Pioneering innovation and driving market leadership are the focus here.



Survey Demographics

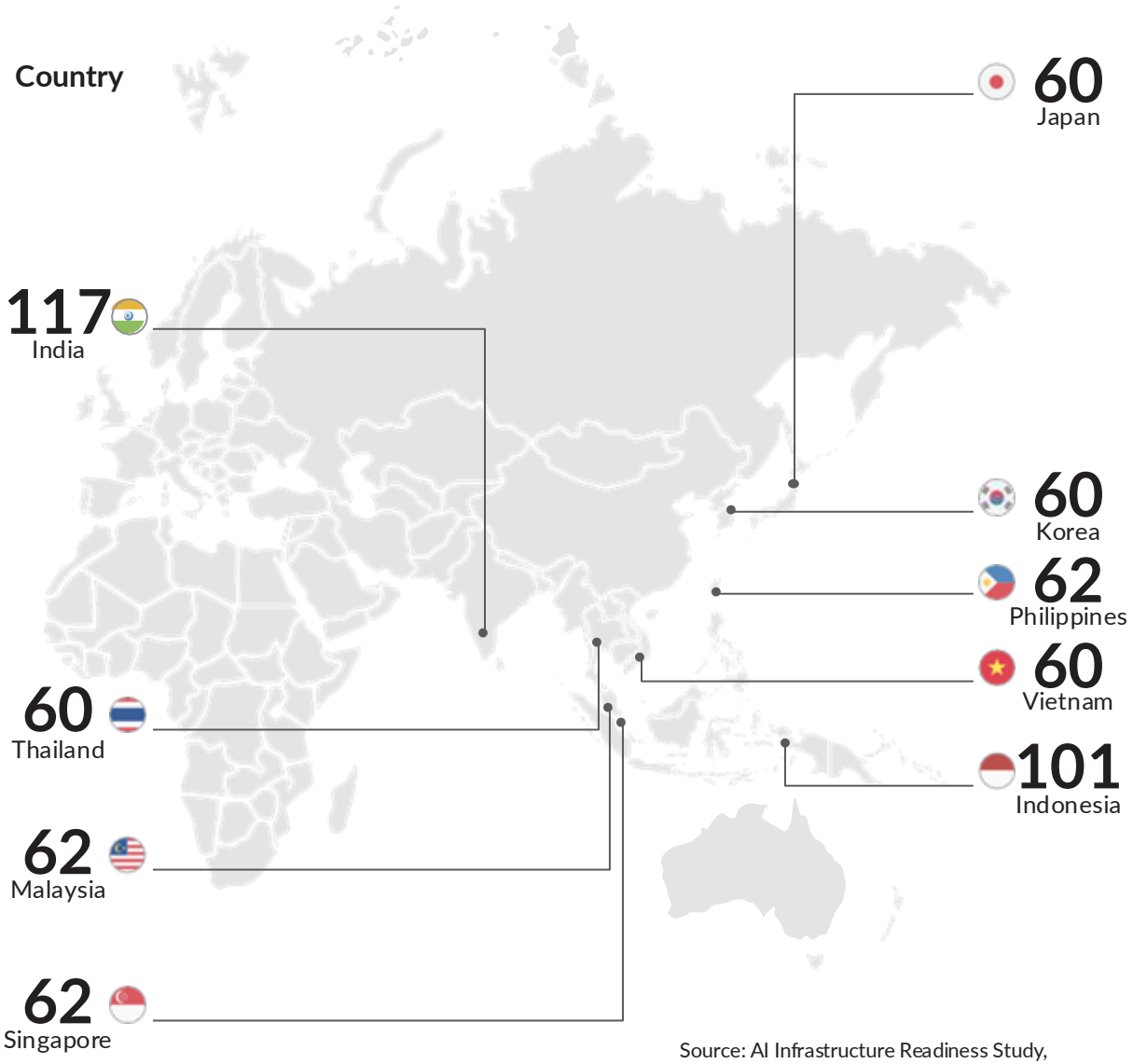
Industry

- 14% Banking & Financial Services
- 13% Manufacturing
- 10% Healthcare
- 10% Professional Services
- 10% Education
- 10% Energy & Utilities
- 10% Government
- 10% Retail & Wholesale
- 10% Hospitality
- 5% Telecom

Organisation type

- 43% Enterprise (1000 or more employees)
- 29% Large (250-999 employees)
- 28% Digital Natives

Country



Source: AI Infrastructure Readiness Study, commissioned by STT GDC, October 2025, n=644

About Ecosystm

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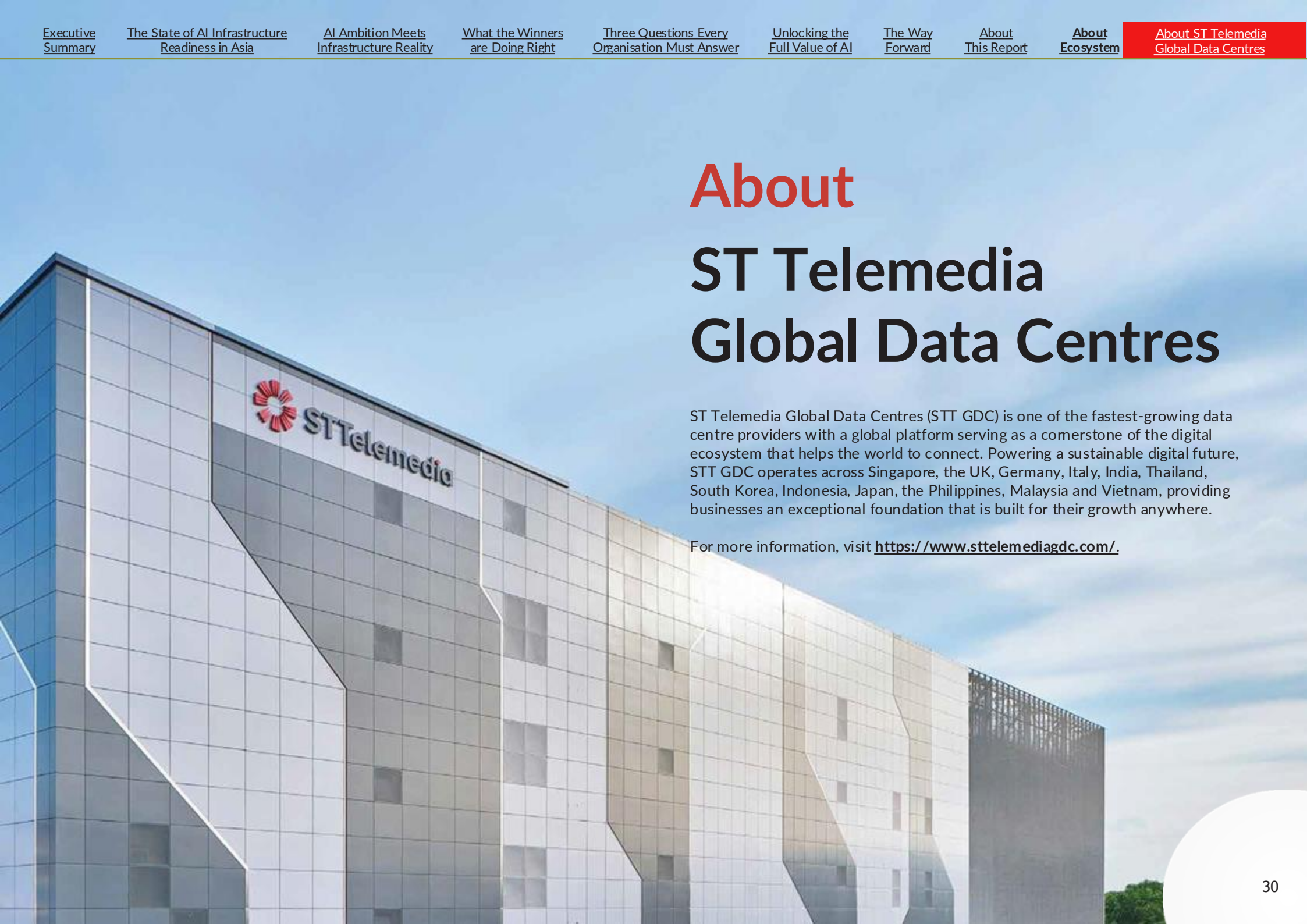
About ST Telemedia Global Data Centres



About

ST Telemedia Global Data Centres

ST Telemedia Global Data Centres (STT GDC) is one of the fastest-growing data centre providers with a global platform serving as a cornerstone of the digital ecosystem that helps the world to connect. Powering a sustainable digital future, STT GDC operates across Singapore, the UK, Germany, Italy, India, Thailand, South Korea, Indonesia, Japan, the Philippines, Malaysia and Vietnam, providing businesses an exceptional foundation that is built for their growth anywhere.

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