Digital Infra Leaders Summit

APAC 2024 EXECUTIVE SUMMARY

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Exclusive invitation-only executive-level workshops held alongside major events, the Digital Infra Leaders Summits have become a highlight on the calendar of digital infra CEOs and industry VIPs.

Held in Singapore in December 2024, alongside ITW Asia, the APAC Digital Infra Leaders Summit brought together 30 of the most influential stakeholders in APAC data centres and connectivity to tackle the main industry challenges the region's digital infra sector faces.

Having each completed a short, anonymised survey ahead of the workshops, analysis of the results was used to help structure and stimulate debate and discussion during the session.

In this Executive Summary, we share with you the main take homes from the session as well as the outcomes of the sentiment analysis

Participating organisations:

airtel, axiata, BDx, CapitaLand, CtrlS, DCI Data Centers, DigitalBridge, ESR, evolution Data Centres, 基滙資本 Gaw Capital, Grain Management, Iron Mountain®, HGC Global Communications, Infrastructure Masons, lightstorm, lintasarta, Morrison, NEXTDC, STACK Infrastructure, STTelemedia Global Data Centres, telenor, Telin

Key discussion areas included:

- Evolving investor sentiment in digital infrastructure asset classes
- Key industry growth drivers and headwinds
- Strategic priorities for the upcoming year
- Priorities for capex allocation
- Business model evolution
- M&A expectations and drivers
- Collaborative activities that should be considered
- The short- and long-term impact of satellite technologies
- The impact of AI on both growth and internal processes
- Ensuring access to affordable, sustainable power

Interested in participating in future workshops?

Contact Digital Infra Leaders' Summit Director, Laura Graves to enquire about eligibility and availability.

E: lgraves@techoraco.com

Digital Infra Leaders APAC Summit 2024
Top 10 takeaways

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1. Investor optimism in APAC digital infrastructure is high, fuelled by demand from AI workloads, cloud and content localisation
2. While AI-related infrastructure is attracting substantial investment, uncertainties around actual demand, coupled with efficiencies in data centre technologies are raising questions about potential data centre over supply
3. New AI-related digital infrastructure monetisation models remain unproven, whilst some carriers are reporting lower-than-expected adoption of AI-driven services, adding to the more cautious outlook
4. Legacy fibre networks are unsuitable for AI and cloud use-cases, creating investment potential for networks that can "scale-on-demand" and be "built-to-change"
5. There is also increased demand for connectivity to regions with more power and land availability for data centre deployments, as traditional locations grapple with power shortages
6. Whilst data centre workloads are moving to markets with power, sensitive data will remain in-country. Countries with natural power generation resources are poised to benefit as balancing power requirements with a net zero agenda and aversion to nuclear intensifies challenges
7. There is a consensus that traditional energy sources are needed to supplement renewable energy in the short to medium term, but they will increasingly face pressure from investors and customers
8. Inter-regional capacity shortages persist, with delays in new cables like Bifrost adding pressure. Proactive collaboration between carriers on larger regional projects is key to cost sharing and competition/ bargaining power with hyperscalers
9. Demand for subsea route diversification is expected to remain, given geopolitical dynamics in APAC
10. There is the potential for operators to explore backwards integration for margin expansion and energy security in the future

Agenda

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01

Scene Setting: Industry Economics and Key trends

02

Deep Dive 1: Investor sentiment & Digital infrastructure partnership models

03

Deep Dive 2: The new Energy security paradigm

04

Wrap-Up: Identifying Collective Industry Priorities

Optimism has slightly increased since last year

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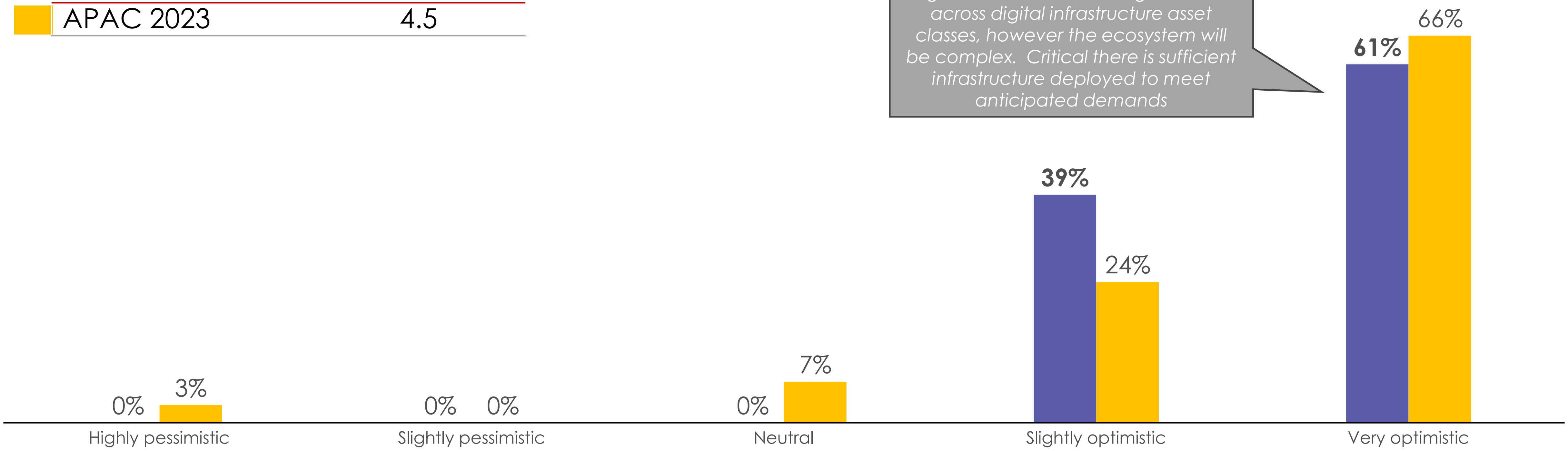
How optimistic are you on the outlook for the digital infrastructure sector in APAC?

Legend	Avg. score
APAC 2024	**4.6**
APAC 2023	4.5

View from the Summit
Significant tailwinds driving demand across digital infrastructure asset classes, however the ecosystem will be complex. Critical there is sufficient infrastructure deployed to meet anticipated demands



Note: n (APAC,2023) = 29; n (APAC, 2024) = 18; May not add up due to null responses provided

Optimism ranks similarly to MENA and North America

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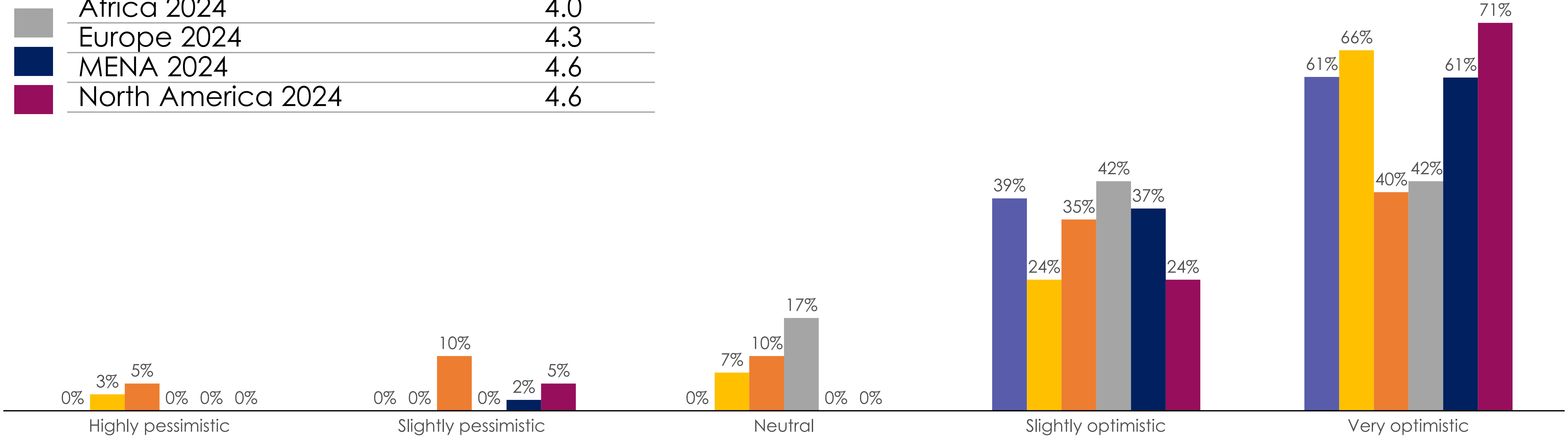
How optimistic are you on the outlook for the digital infrastructure sector in APAC?

Legend	Avg. score
APAC 2024	**4.6**
APAC 2023	4.5
Africa 2024	4.0
Europe 2024	4.3
MENA 2024	4.6
North America 2024	4.6



Note: n (APAC, 2024) = 18; n (Africa, 2024) = 20; n (Europe, 2024) = 24; n (NA, 2024) = 21; n (APAC,2023) = 29; n (MENA,2024) = 41; May not add up to null responses provided

High optimism in the data centre industry

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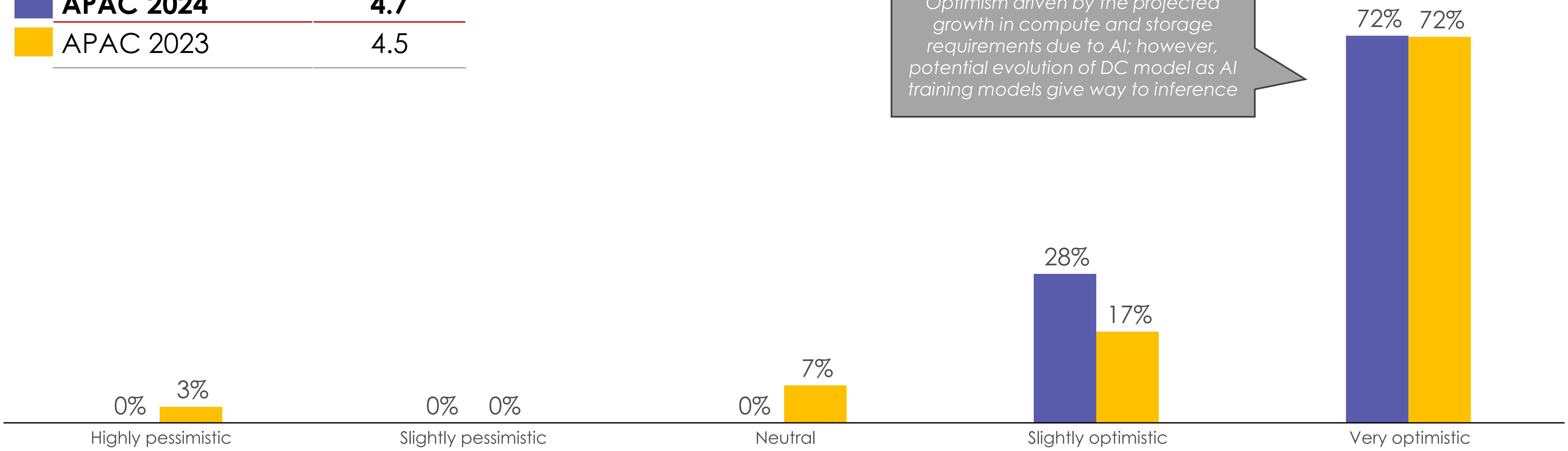
How optimistic are you on the outlook for the data centre sector in APAC?

Legend	Avg. score
APAC 2024	**4.7**
APAC 2023	4.5

View from the Summit
Optimism driven by the projected growth in compute and storage requirements due to AI; however, potential evolution of DC model as AI training models give way to inference



Note: n (APAC,2023) = 29; n (APAC, 2024) = 18; May not add up due to null responses provided

Optimism in APAC towards DCs rank higher than other regions

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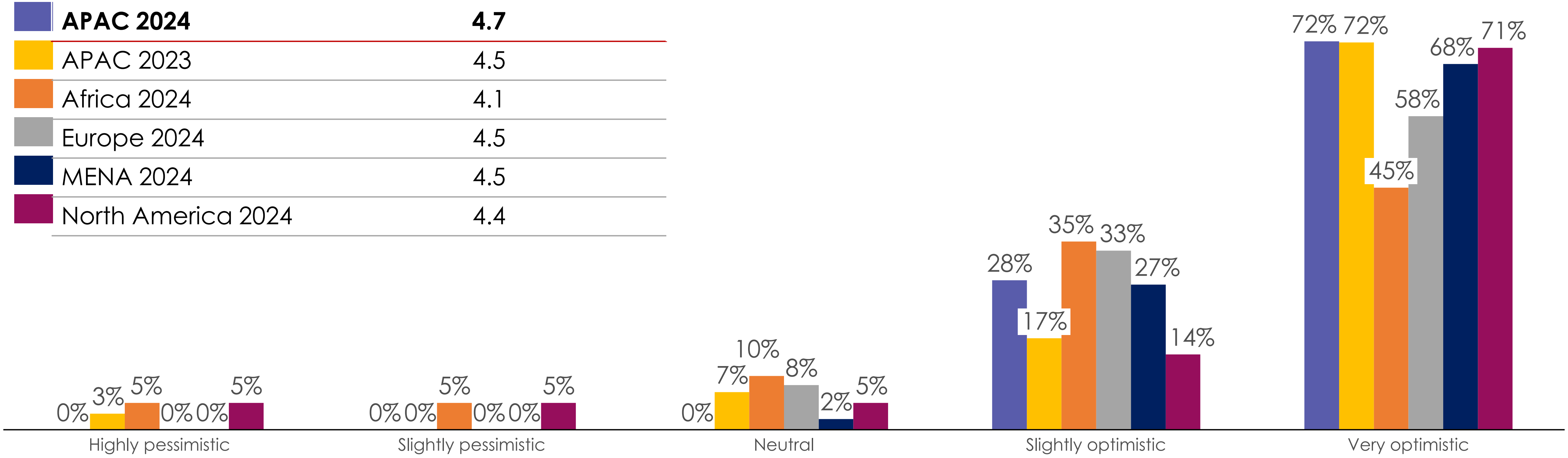
How optimistic are you on the outlook for the data centre sector?

Legend	Avg. score
APAC 2024	**4.7**
APAC 2023	4.5
Africa 2024	4.1
Europe 2024	4.5
MENA 2024	4.5
North America 2024	4.4



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Optimism in terrestrial fibre has decreased

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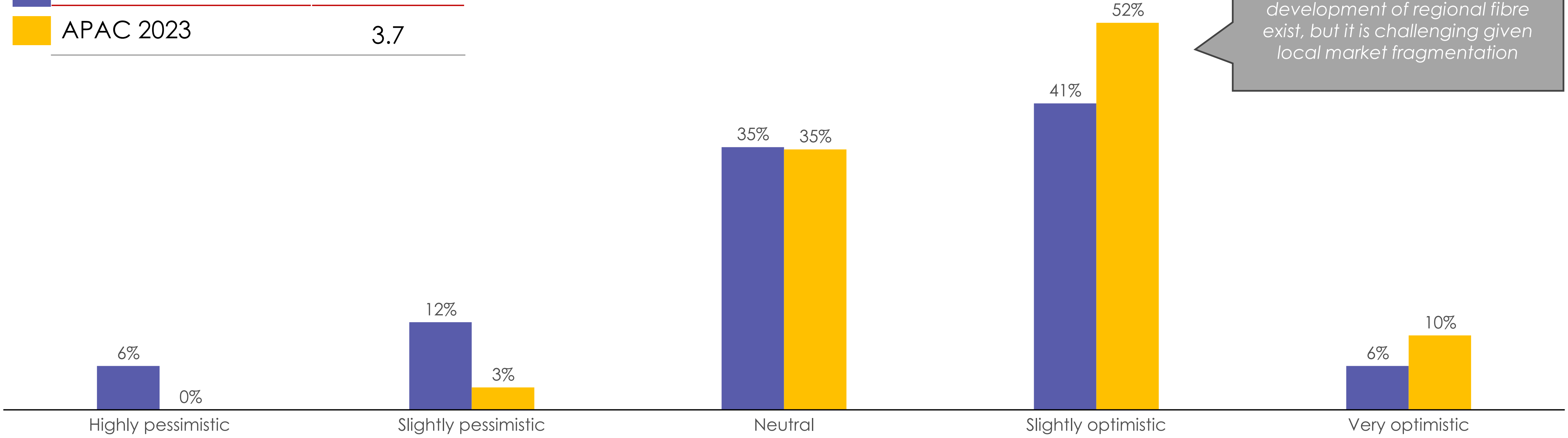
How optimistic are you on the outlook for the terrestrial fibre sector in APAC?

Legend	Avg. score
APAC 2024	**3.3**
APAC 2023	3.7



View from the Summit
Opportunities for further development of regional fibre exist, but it is challenging given local market fragmentation

Note: n (APAC,2023) = 29; n (APAC, 2024) = 18; May not add up due to null responses provided

Relative to other regions, terrestrial fibre optimism is low

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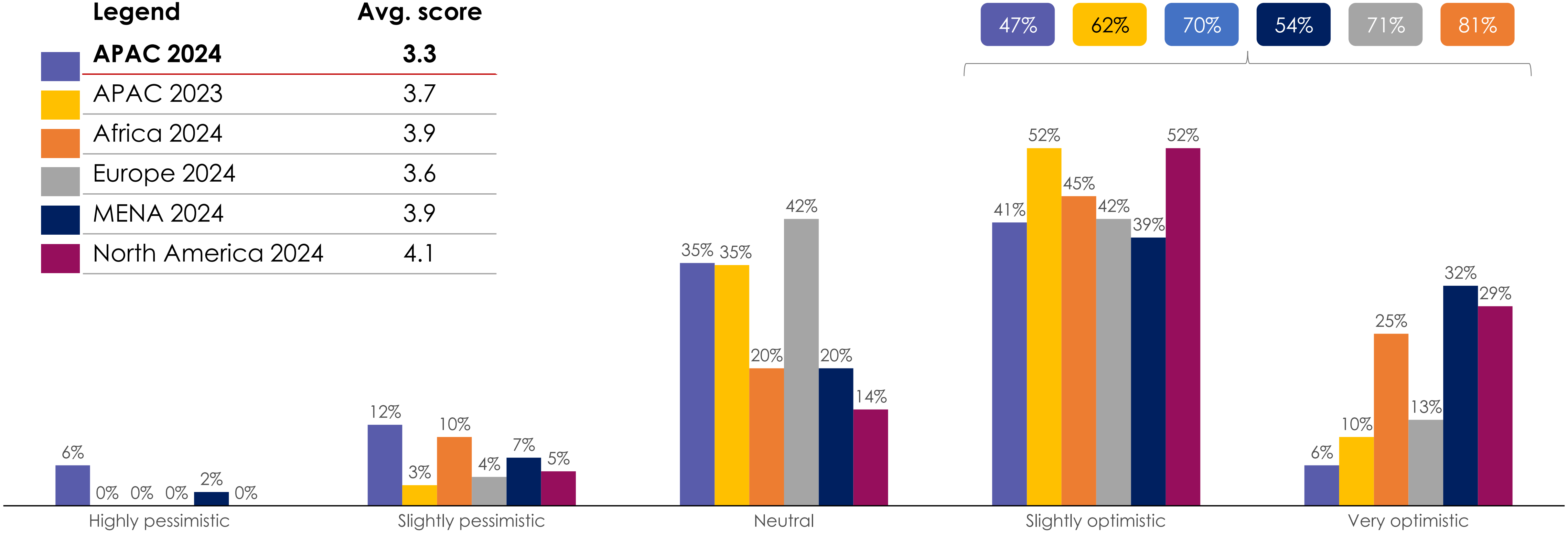
How optimistic are you on the outlook for the terrestrial fibre sector?

Legend	Avg. score
APAC 2024	**3.3**
APAC 2023	3.7
Africa 2024	3.9
Europe 2024	3.6
MENA 2024	3.9
North America 2024	4.1



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And subsea? 60% of all respondents are slightly or very optimistic about subsea…

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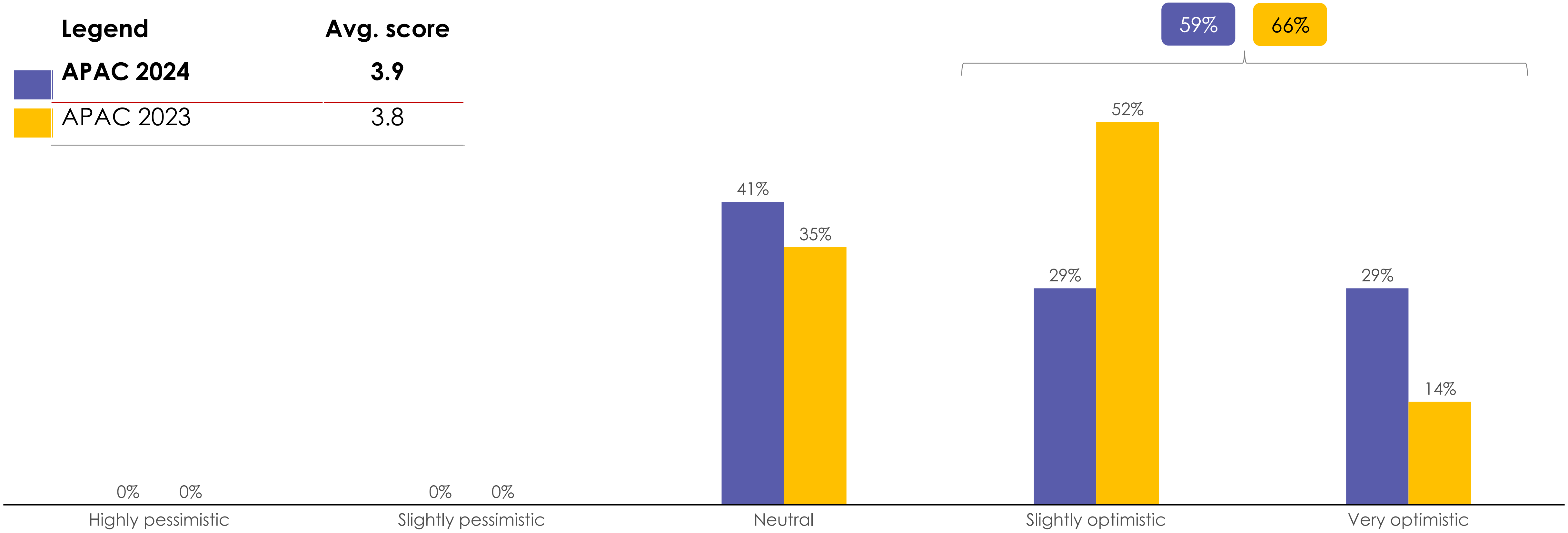
How optimistic are you on the outlook for the subsea cable sector in APAC?

Legend	Avg. score
APAC 2024	**3.9**
APAC 2023	3.8



Note: n (APAC,2023) = 29; n (APAC, 2024) = 18; May not add up due to null responses provided

… ranking below MENA and Africa in optimism for subsea cables

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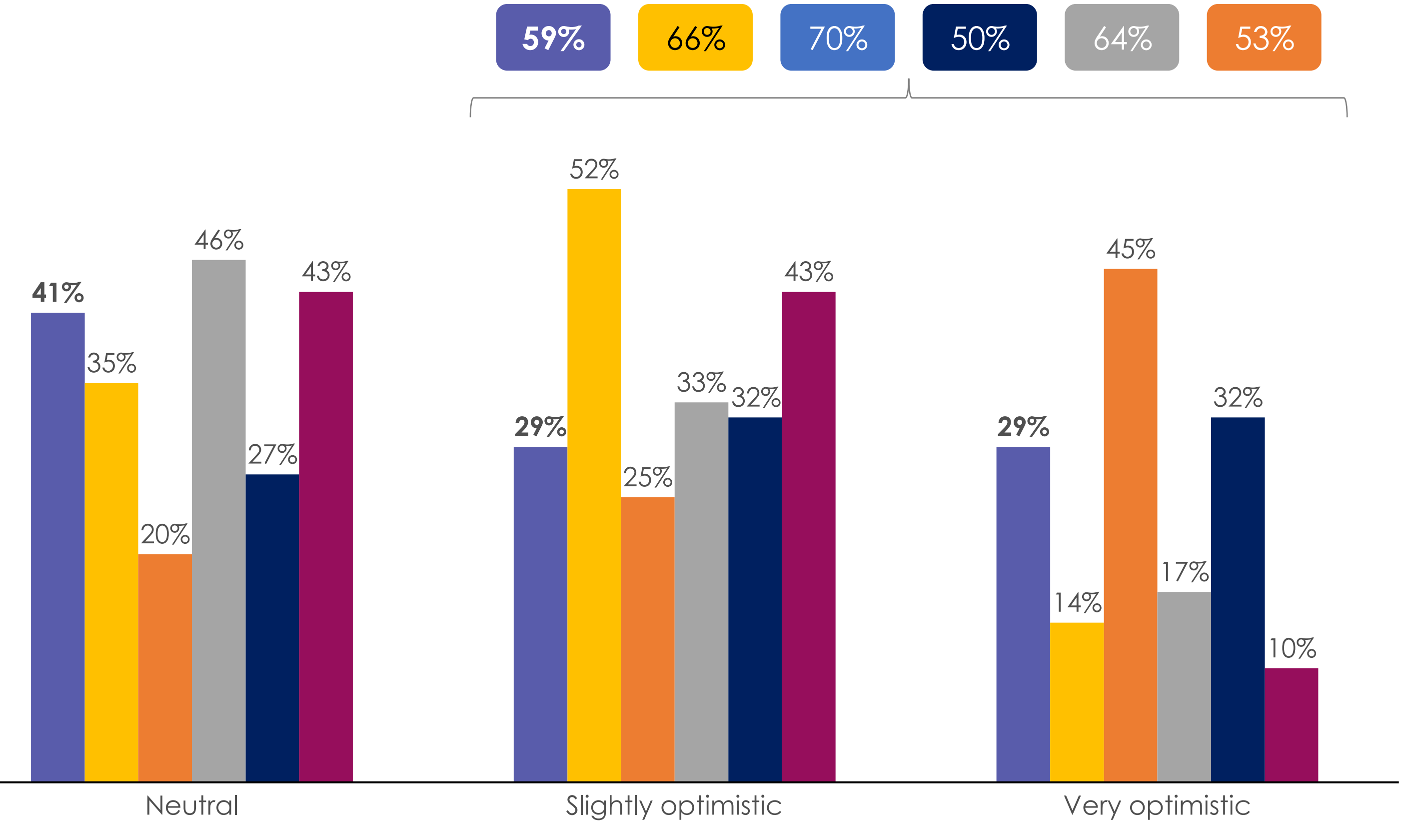
How optimistic are you on the outlook for the subsea cable sector?

Legend	Avg. score
APAC 2024	**3.9**
APAC 2023	3.8
Africa 2024	4.0
Europe 2024	3.6
MENA 2024	3.8
North America 2024	3.6



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Looking into the future, cloud services, AI & ML, Geopolitical & regulatory changes and Big data are the main growth drivers

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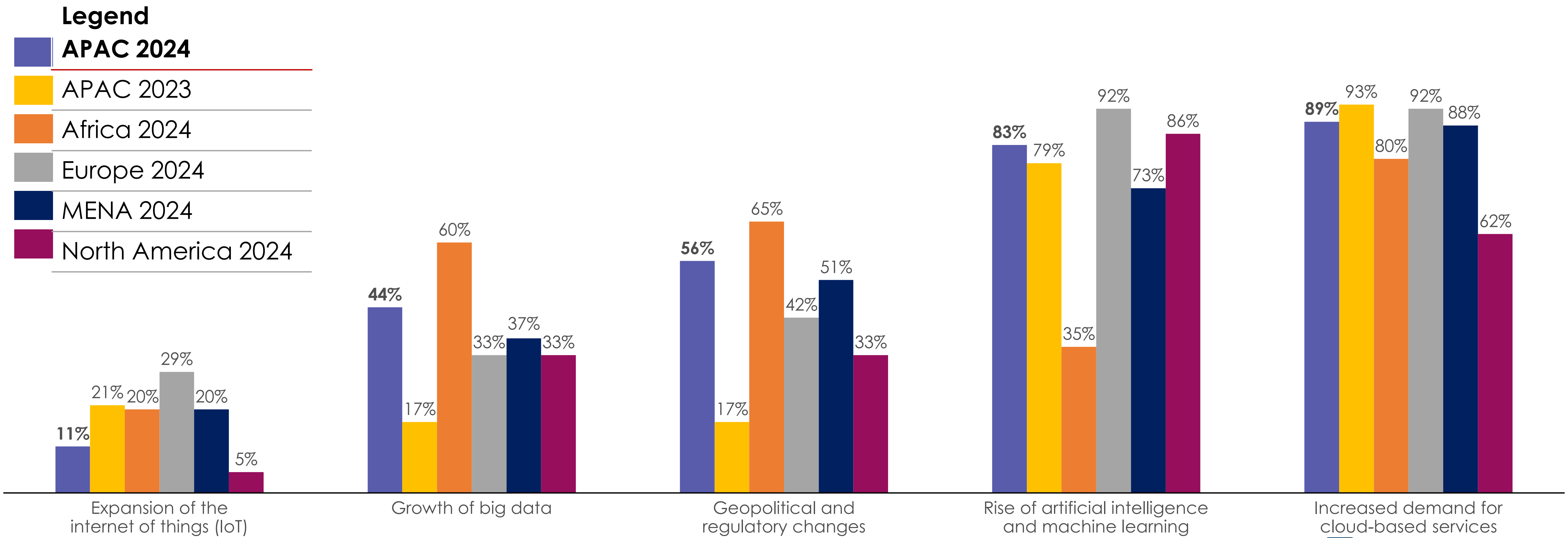
In your opinion, what are the key drivers for the growth of the digital infrastructure market in 2024-2025? (% of respondents that agree the area is a key growth driver)



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How to realise the AI opportunity? Everything BUT talent?

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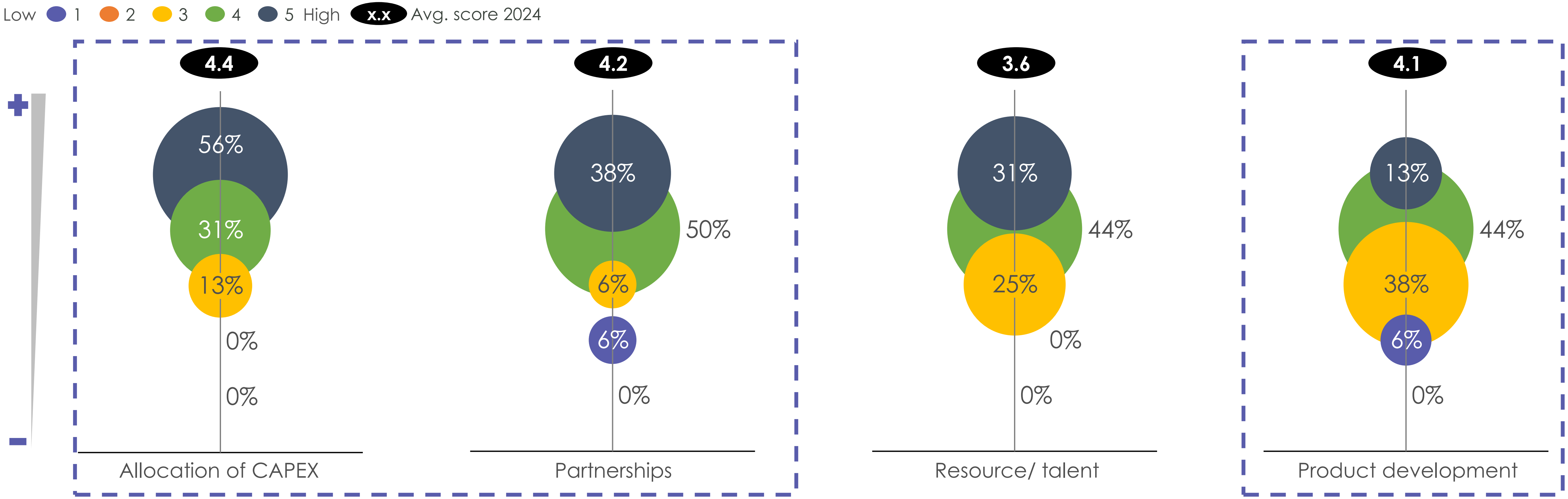
How relevant are the following in your leadership focus today with regards to AI

(score 1-5 with 1 being lowest and five being highest focus)



Note: n (APAC, 2024) = 18; May not add up to 100% due to rounding and/or null responses provided

You believe AI will have the greatest impact on hyperscale DC, Tier 1 and Tier 2+ city DC

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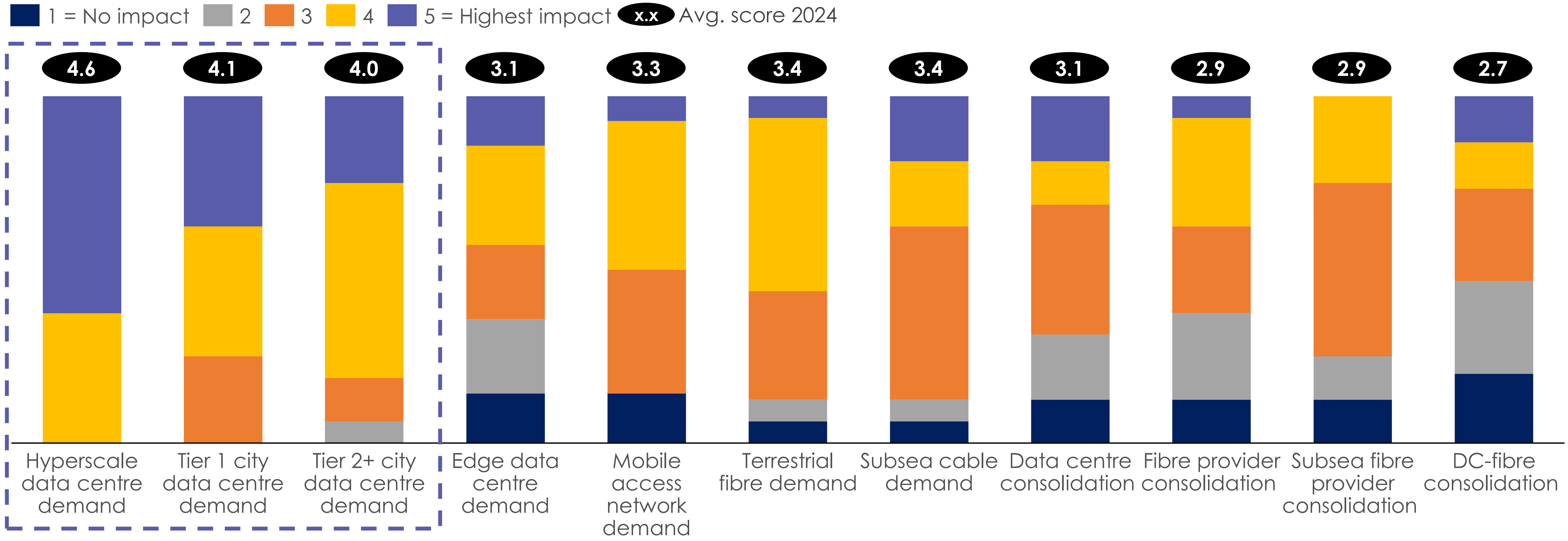
To what extent do you believe the growth in AI / generative AI will impact the following (score 1-5, with 1 being no impact and 5 being highest impact)



Note: n (APAC, 2024) = 18; May not add up to 100% due to rounding and/or null responses provided

Summary of discussion

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01 **AI trend will continue to grow, but not everyone may emerge winners**

- AI-driven infrastructure is attracting a significant amount of capital, but questions remain on eventual payoff
- Efficiencies in datacenter technologies and AI workloads may result in overcapacity
- Within the region, some carriers are seeing lower-than-expected take-up of AI-related services (e.g., GPUaaS)

02 **Proactive collaboration needed to support infrastructure regionalization**

- Cross-border infrastructure development provides greater access to capital sourced regionally
- Potential for more ambitious projects with attractive risk profiles and upside (e.g. India, Southeast Asia)
- Trends towards outsourced workloads to countries with power, while keeping sensitive workloads within borders
- Need for carriers need to proactively collaborate on larger regional projects or lose out to hyperscalers

03 **Innovative ways to overcome energy availability are needed**

- Highly challenging but key to balance needs for power, net-zero agenda, and aversion to nuclear (e.g. Japan)
- Increasing bets on geographies with natural power generation advantages (e.g. gas, geothermal)
- Investors are looking to bring power to a geography vs bringing a geography to power (e.g. Singapore)

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Scene Setting: Industry Economics and Key trends

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Deep Dive 1: Investor sentiment & Digital infrastructure partnership models

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Deep Dive 2: The new Energy security paradigm

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Wrap-Up: Identifying Collective Industry Priorities

Infrastructure focus: Overall sector perspective

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General investments in the digital infrastructure sector

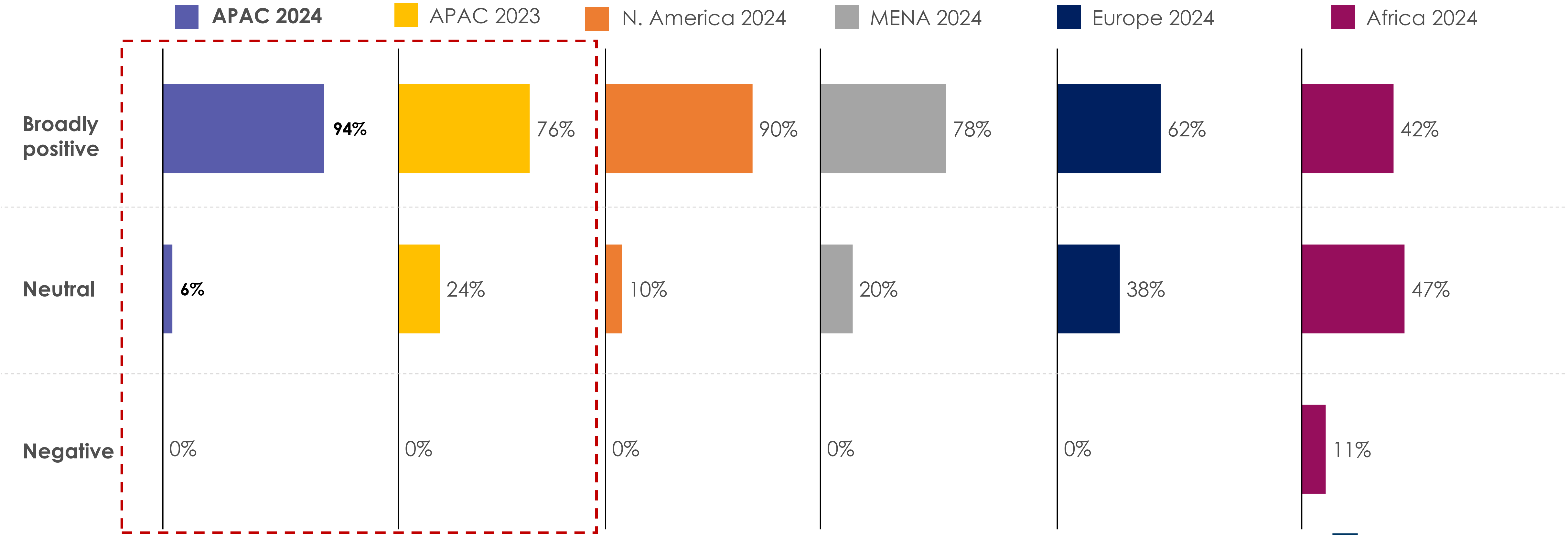
Data Centres

Terrestrial fibre

Subsea cable

Investor sentiment has increased in APAC over the past 12 months

To the best of your knowledge, in APAC, what is the overall investor sentiment, considering capital to be deployed in digital infrastructure over 2024-2025?



Note: n (Europe, 2024) = 24; n (Africa, 2024) = 20; n (NA, 2023) = 14; n (Africa, 2023) = 23; n (APAC,2023) = 29; n (MENA,2024) = 41; May not add up to null responses provided

There has been a 18% shift from "neutral" to "positive"

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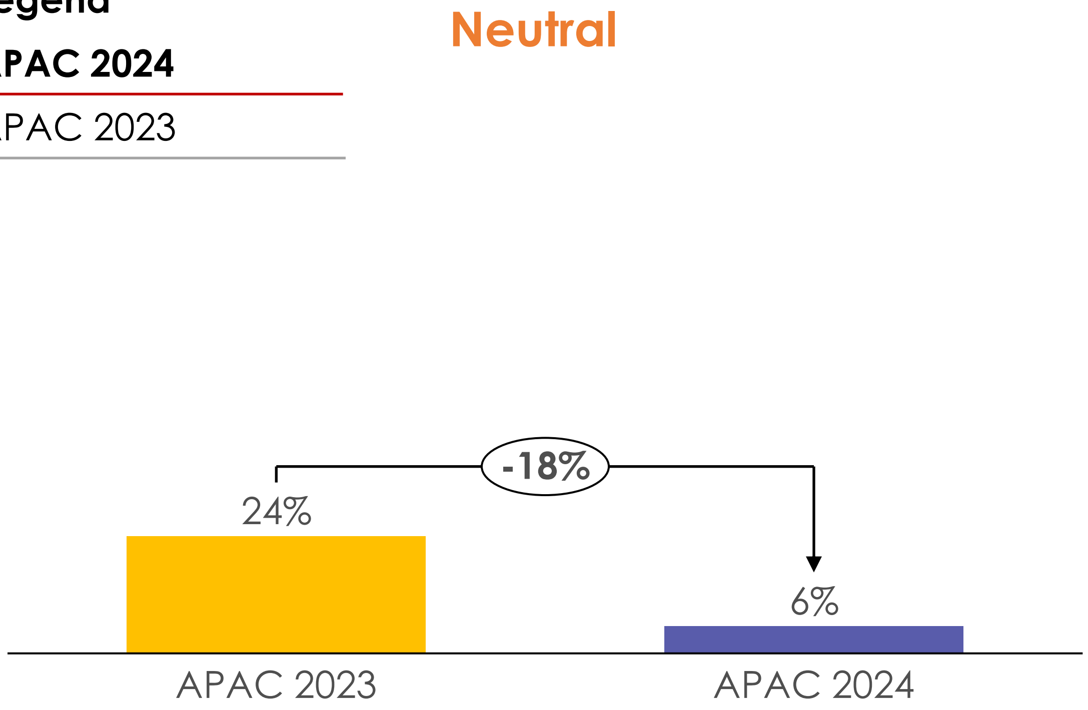
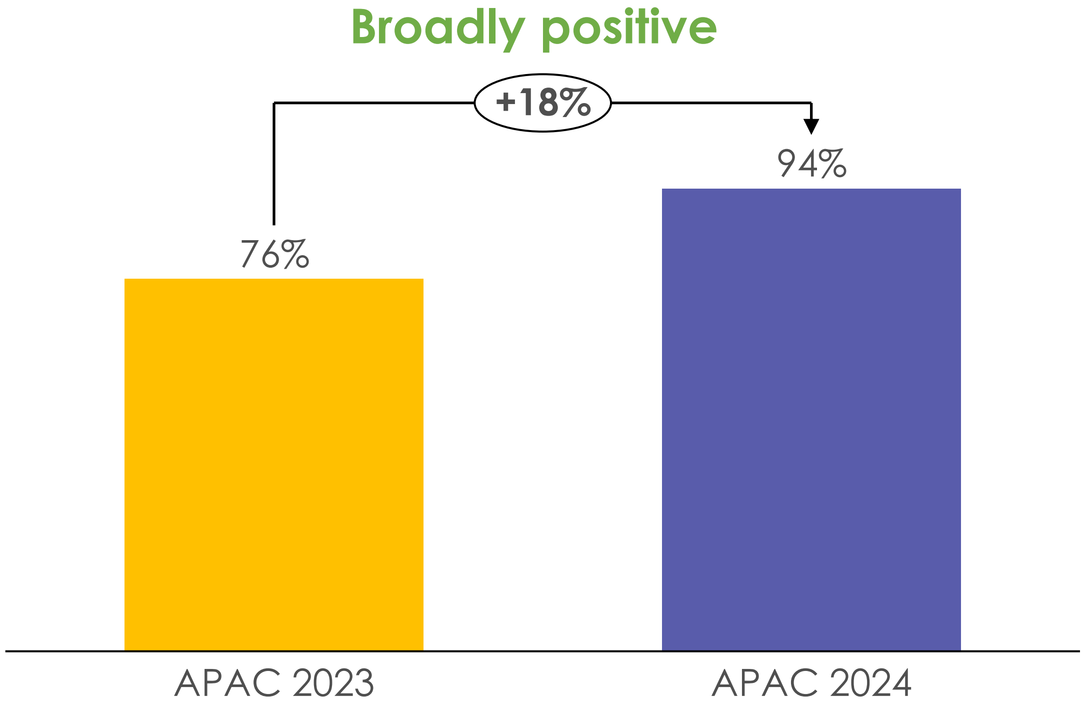
To the best of your knowledge, in APAC, what is the overall investor sentiment, considering capital to be deployed in digital infrastructure over 2024-2025?

Legend

APAC 2024

APAC 2023





Explanations provided by the participants on the following slides

Note: n (APAC,2023) = 29; n (APAC, 2024) = 18; May not add up due to null responses provided

There is a diverse view when it comes to anticipation of M&A

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What level of digital infrastructure industry M&A are you anticipating for 2024?
(Very low, Low, Moderate, High, Very High)

	Very low	Low	Moderate	High	Very high	Weight. Avg.
Data centres	0%	6%	39%	56%	0%	3.4
Terrestrial fibre	6%	29%	47%	18%	0%	2.8
Mobile towers	6%	18%	35%	41%	0%	3.1
Mobile access networks / MNOs	12%	29%	29%	29%	0%	2.6
Subsea cable	12%	59%	24%	6%	0%	2.1
Satellite	6%	41%	35%	12%	7%	2.7

Note: n (APAC,2023) = 29; n (APAC, 2024) = 18; May not add up due to null responses provided

What did you tell us?

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What is the overall investor sentiment, considering capital to be deployed in digital infrastructure over 2024-2025?

> Ample growth headroom with demand exceeding capacity

> Developing countries with room to improve / increase demand in digital fiberization & infrastructure

> APAC is a growth market, with a large population that will overtake other regions

> Plenty of capital still waiting to be deployed into DCs in APAC

> Still a fragmented industry and there is a lot of private equity eyeing into this industry

> Capital is evidently flowing into the DC sector and deals are being concluded

Note: n (APAC, 2024) = 18. May not add up to 100% due to rounding and/or null responses provided

Infrastructure focus: Data centres

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General investments in the digital infrastructure sector

Data Centres

Terrestrial fibre

Subsea cable

Data centre attractiveness for remains high

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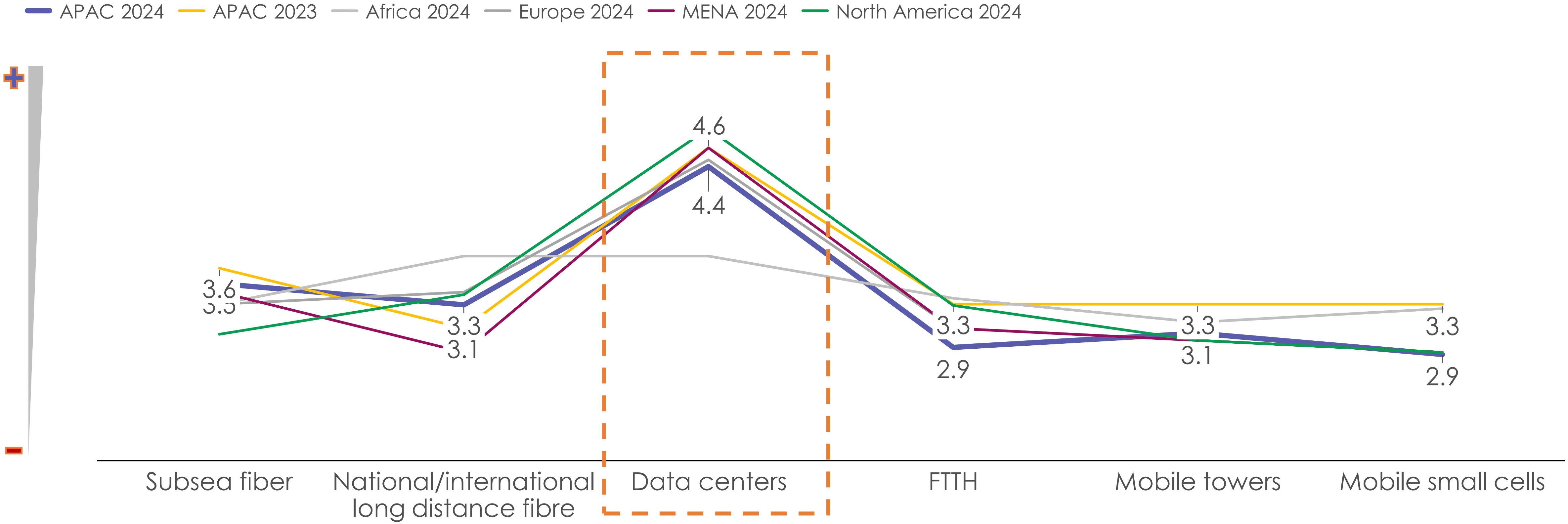
How attractive do you see digital infrastructure classes in APAC for investment over the next three years? (score 1-5, with 1 = low, 5 = high)



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…with attractiveness still expected to increase steadily over the next three years, but with a little more caution than last year

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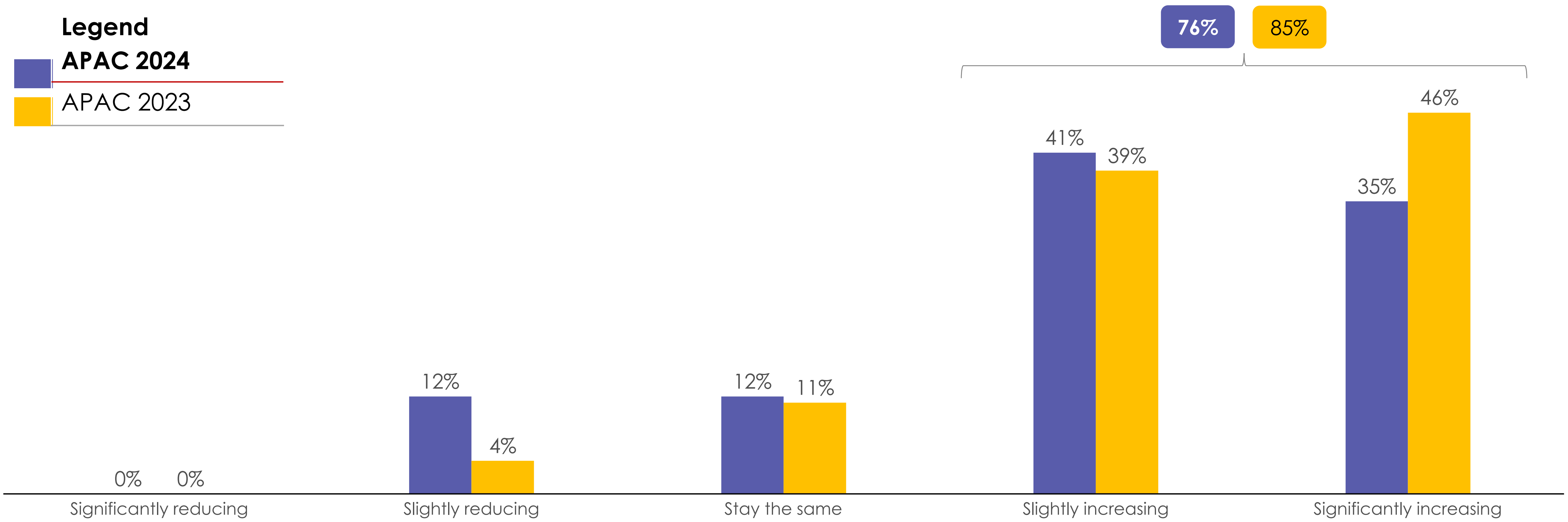
How do you see the attractiveness of data centre investment in APAC evolving over the next three years vs. today?



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Still, the increase in attractiveness is marginally less than other regions

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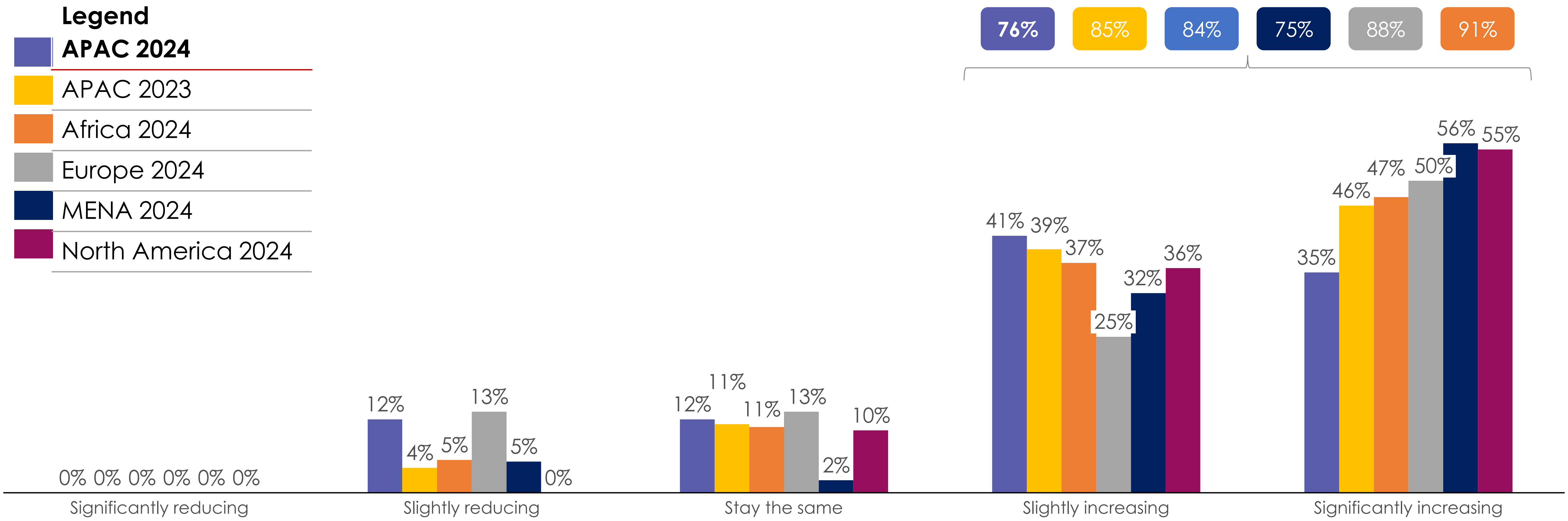
How do you see the attractiveness of data centre investment in APAC evolving over the next three years vs. today?



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You see that hyperscaler capacity requirements are driving up data centre demand capacity

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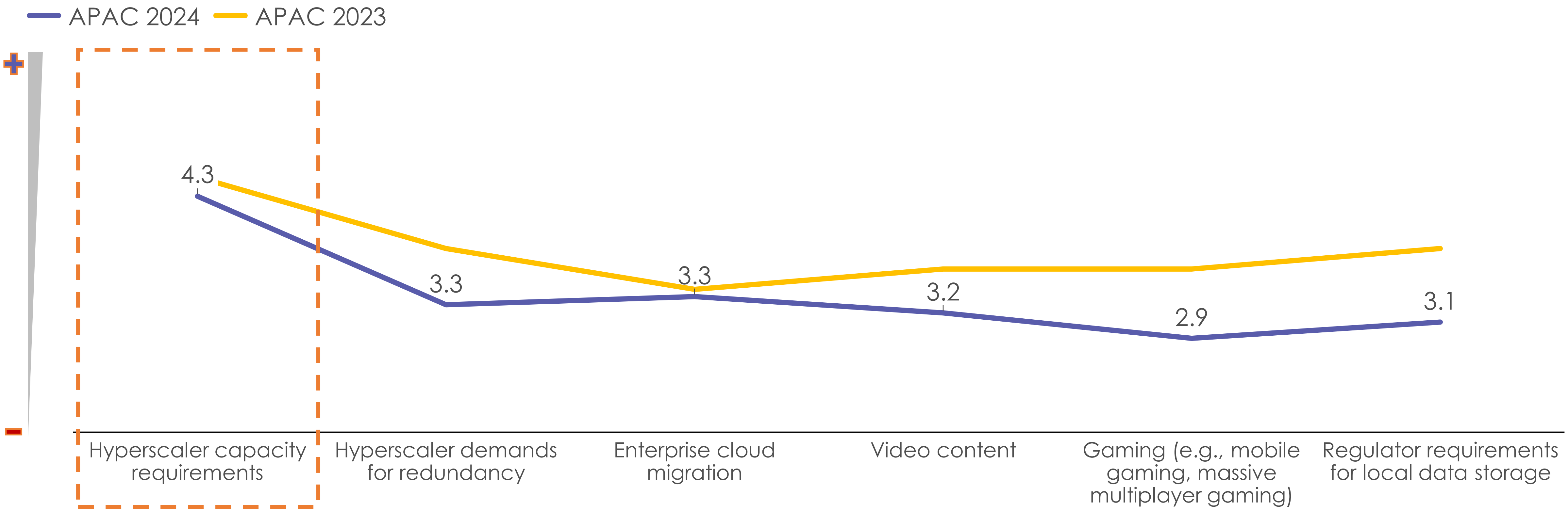
How will the relevance of the following data centre demand capacity factors change over 2024-2025?
(5 – very relevant, 1 – not relevant)



Note: n (APAC, 2024) = 18; May not add up to 100% due to rounding and/or null responses provided

Long-term WS colocation is still expected to attract the most capital

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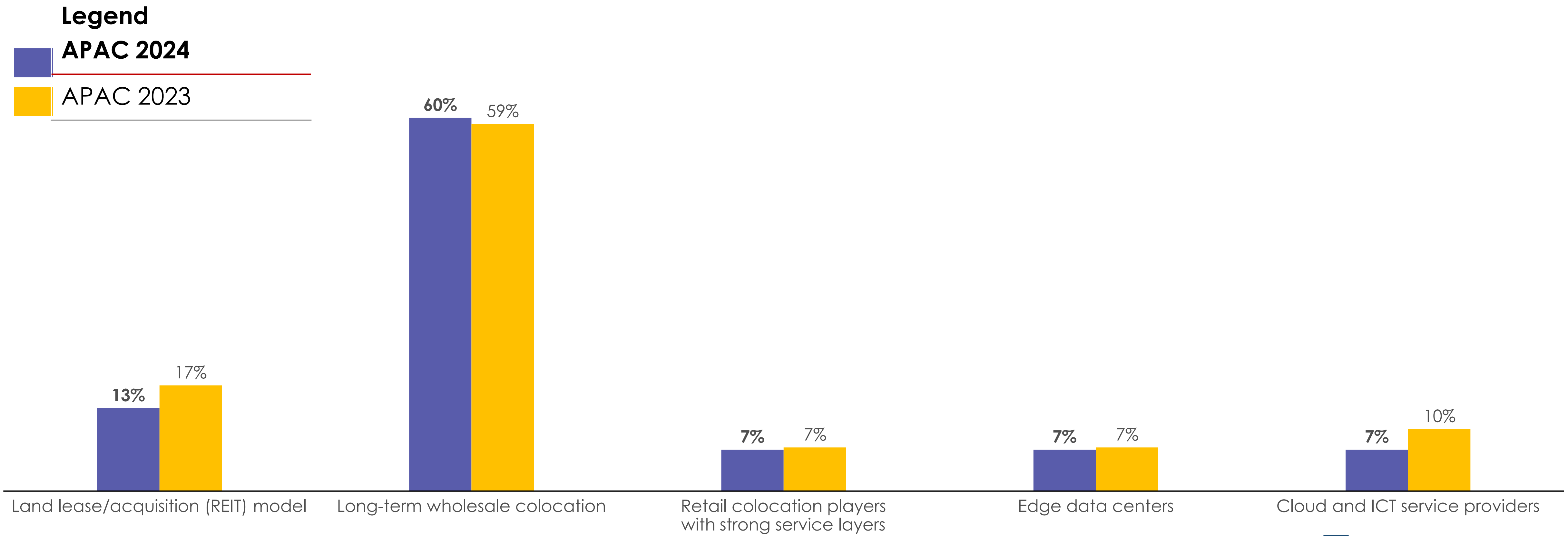
Which part of data centre market value chain will attract most capital in 2024-2025?



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Driving a significant change from REIT to WS colocation

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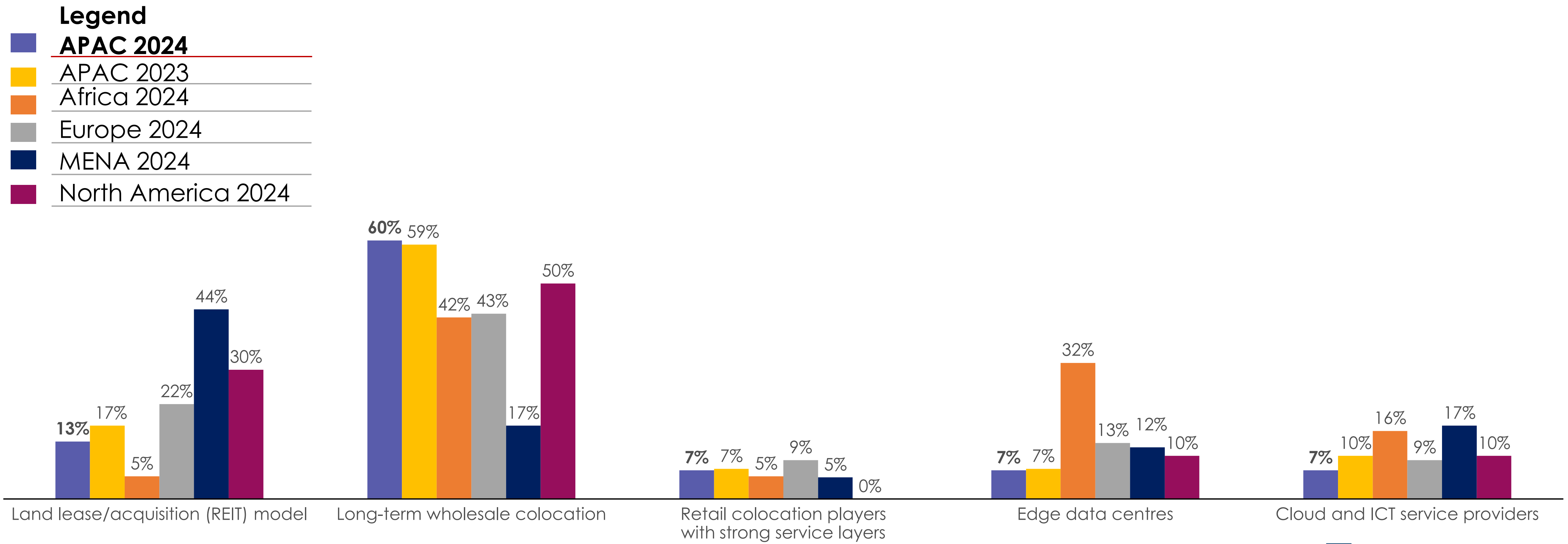
Which part of data centre market value chain will attract most capital in 2024-2025?



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Financial investors continue to be seen as main providers of financing

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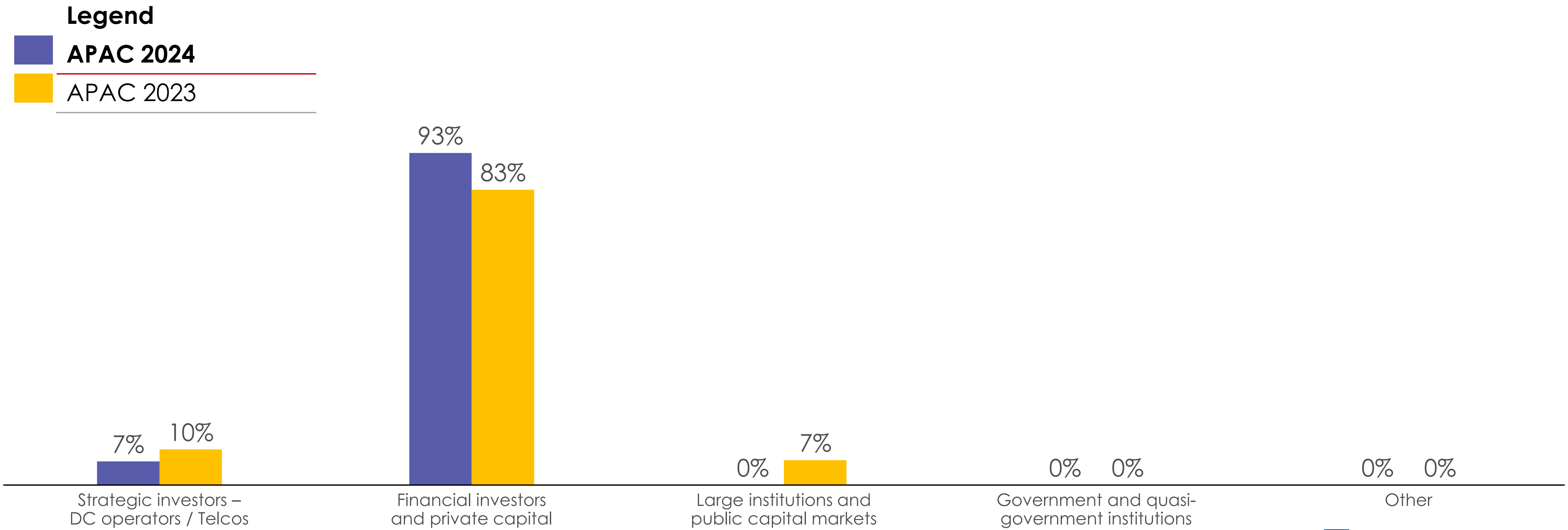
What do you see as the main providers of capital for data centres in APAC in 2024-2025?



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A pattern that remains consistent across the world different regions

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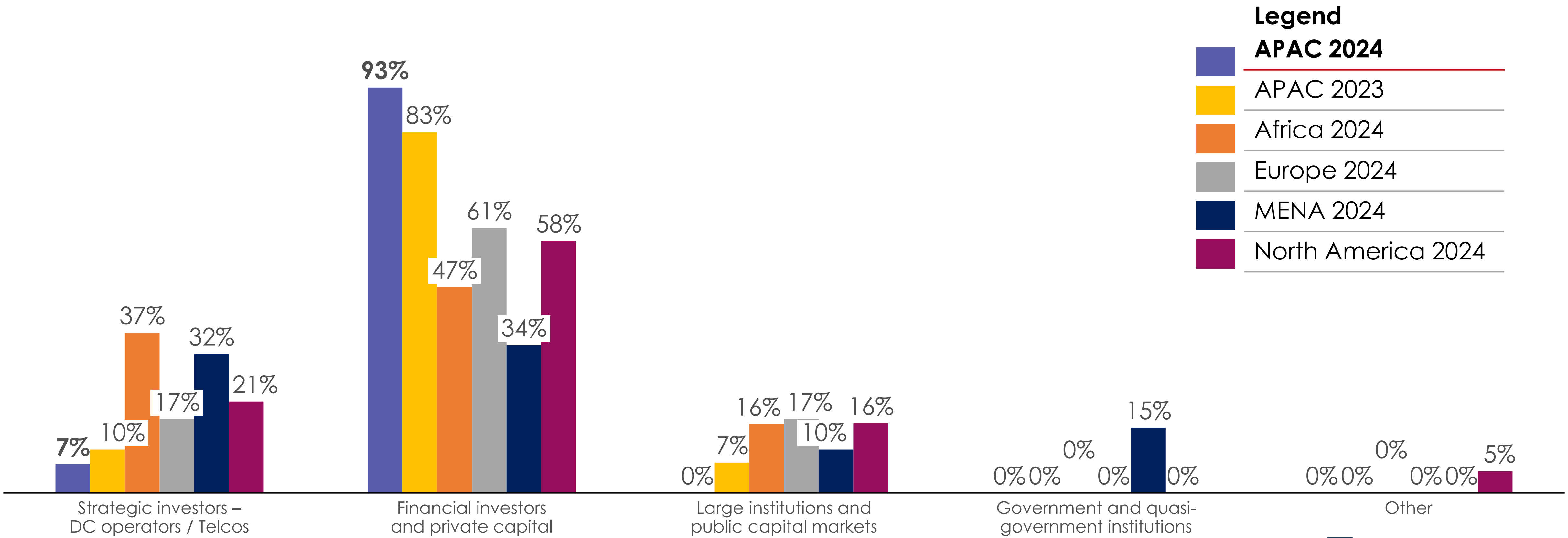
What do you see as the main providers of capital for data centres in APAC in 2024-2025?



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Accumulation of power in hyperscalers, and commercial challenges are the greatest challenges

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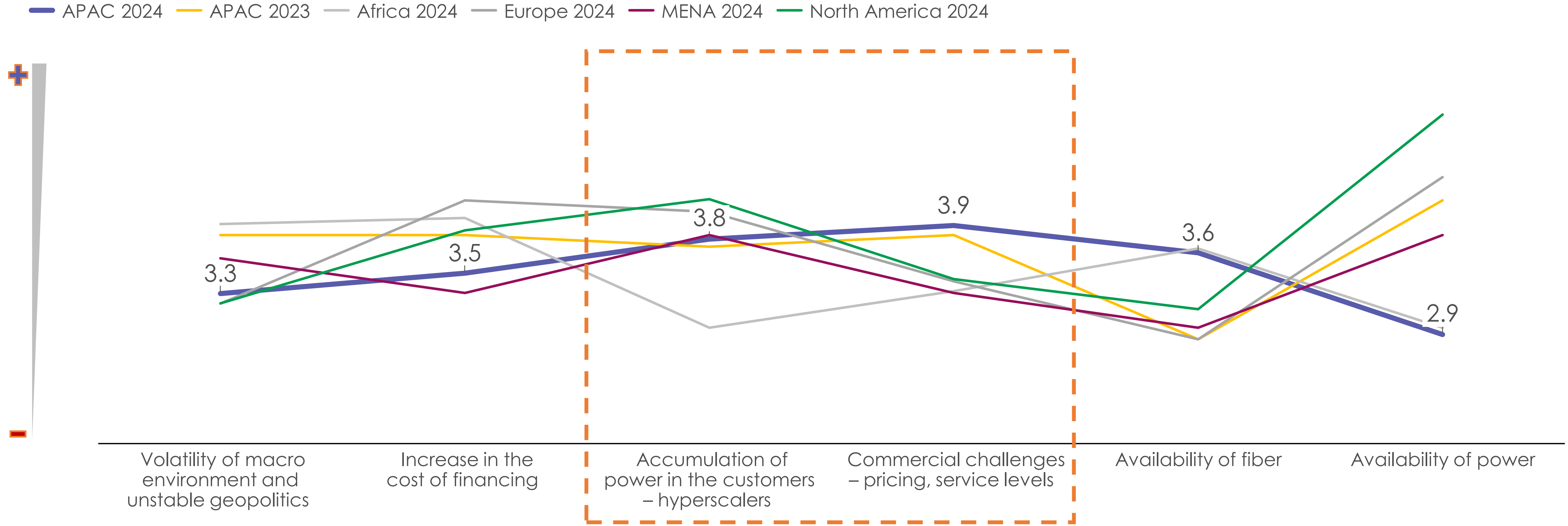
What are the key challenges facing data centre investors in APAC?
(score 1-5, with 1 = not challenging, 5 = very challenging)



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Geographical presence, footprint and scale elements of the DC business model are expected to change the most

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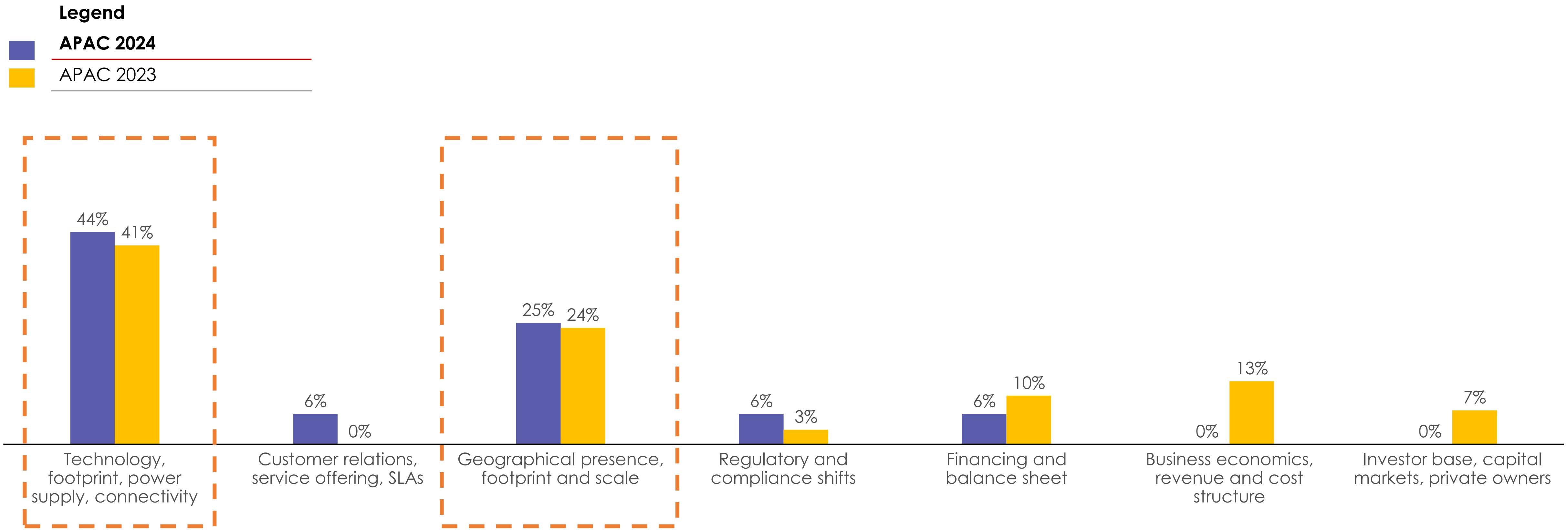
In your opinion, which parts of the DC business model will change the most in 2024-2025?



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Infrastructure focus: Terrestrial fibre and subsea cable

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General investments in the digital infrastructure sector

Data Centres	Terrestrial fibre	Subsea cable

60% of respondents think that attractiveness of both subsea and terrestrial fibre investment is increasing

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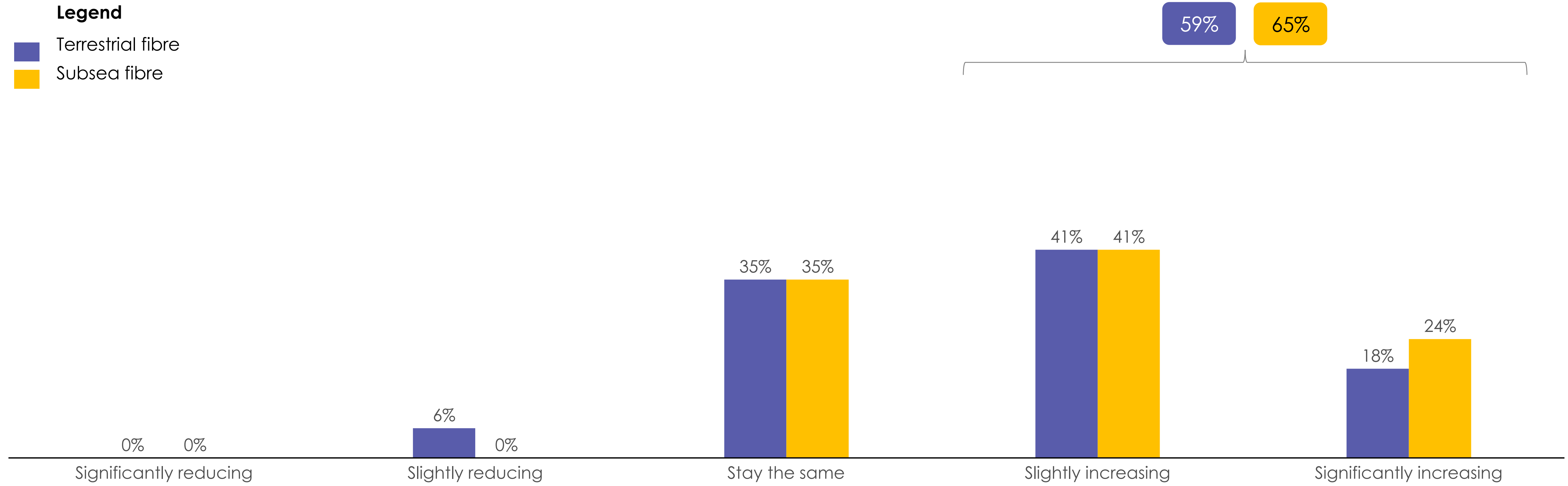
How do you see the attractiveness of terrestrial or subsea fibre investment in APAC evolve over the next three years vs. today?



Note: n (APAC,2023) = 29; n (APAC, 2024) = 18; May not add up due to null responses provided

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60% of respondents see attractiveness of terrestrial fibre investment increasing…

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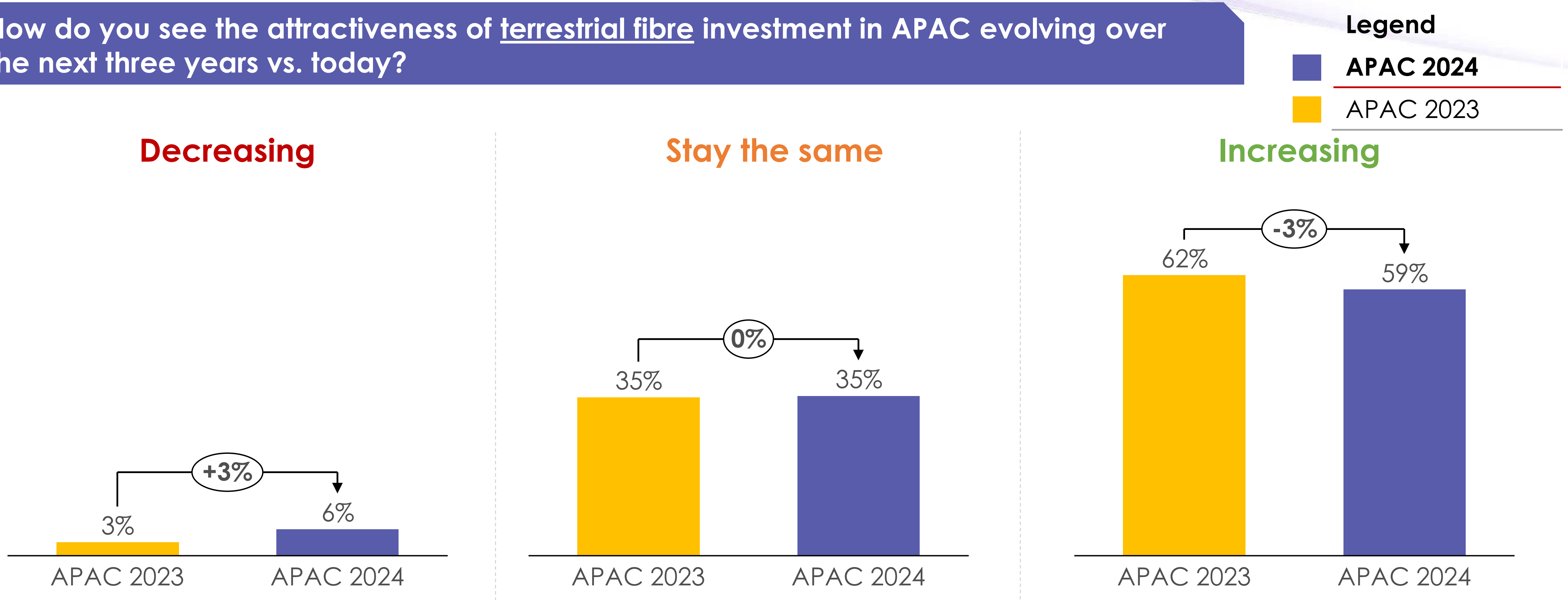
How do you see the attractiveness of terrestrial fibre investment in APAC evolving over the next three years vs. today?



Note: n (APAC, 2023) = 29; n (APAC, 2024) = 18; May not add up to null responses provided

… and subsea fibre attractiveness remains the same vs last year

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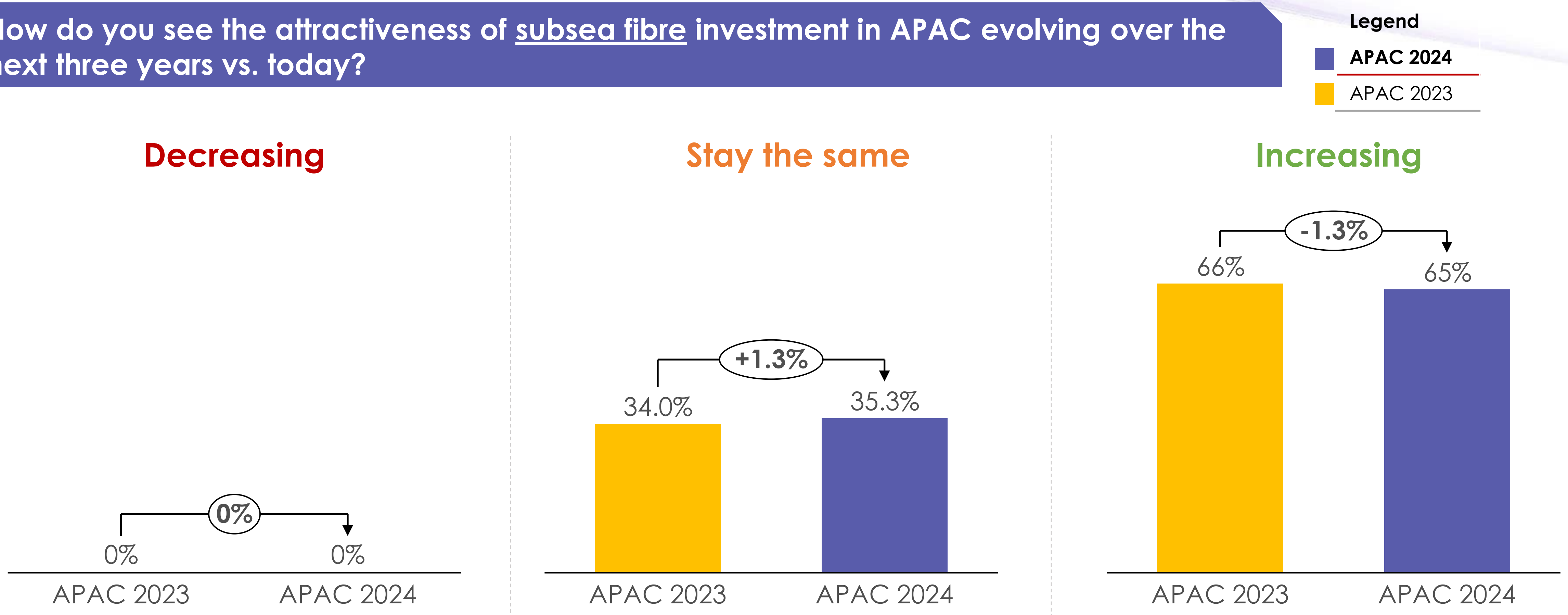
How do you see the attractiveness of subsea fibre investment in APAC evolving over the next three years vs. today?



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There is increasing adoption of more advanced fibre optics technologies to support higher bandwidth requirements

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Legend: Backbone, Metro

Expected evolution of Ethernet solution adoption

Example of high-capacity fibre rollout globally

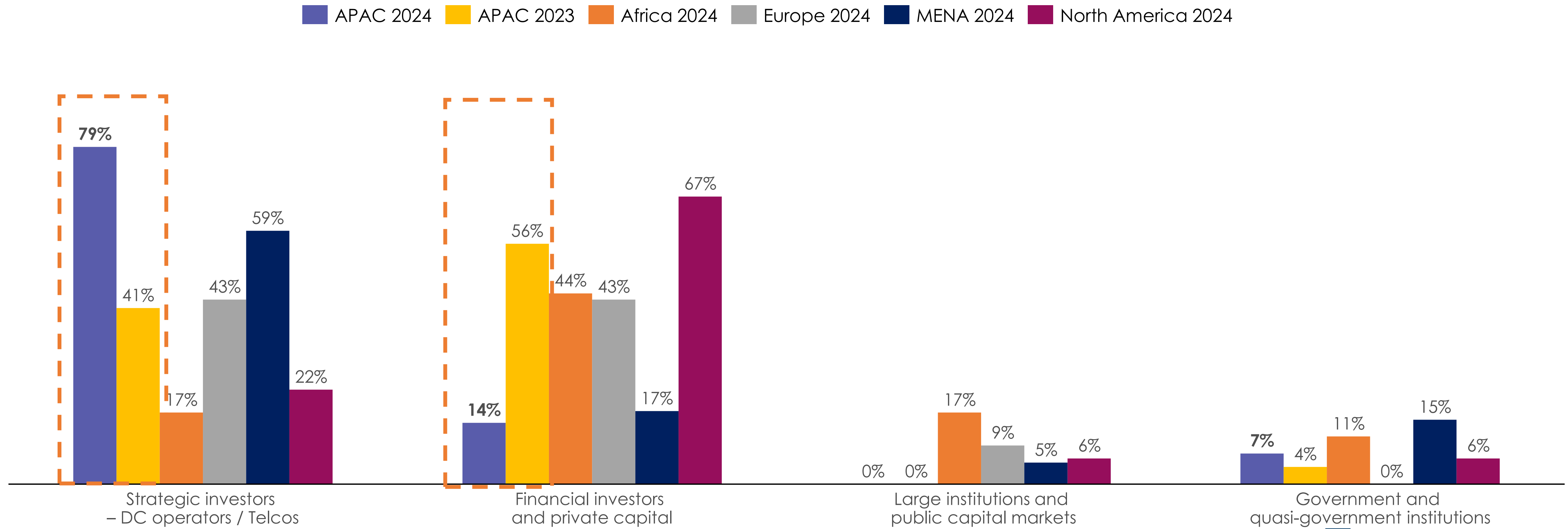
COMPANY	COUNTRY	YEAR	NW BANDWIDTH		TOPOLOGY		STAGE	
MTN	South Africa	2024	**800G**	1.6T			**Deployment**	Trial
entel	Chile	2024	**800G**	1.6T			**Deployment**	Trial
windstream	USA	2023	**800G**	1.6T			Deployment	**Trial**
Virgin media O2	UK	2023	**800G**	1.6T			**Deployment**	Trial
CityFibre	UK	2021	**800G**	1.6T			**Deployment**	Trial
VOCUS	Australia	2024	800G	**1.6T**			**Deployment**	Trial
etisalat by e&	UAE	2024	800G	**1.6T**			Deployment	**Trial**

Source: Frost & Sullivan, news clippings, FTI Delta analysis

For terrestrial fibre, primary sources of capital are expected to be primarily strategic

Digital Infra Leaders Summit

What do you see as the main providers of capital for terrestrial fibre in APAC 2024-2025?



Note: n (APAC, 2024) = 18; n (Africa, 2024) = 20; n (Europe, 2024) = 24; n (NA, 2024) = 21; n (APAC,2023) = 29; n (MENA,2024) == 41; May not add up to null responses provided

Accumulation of power in hyperscalers is a larger challenge in subsea vs terrestrial

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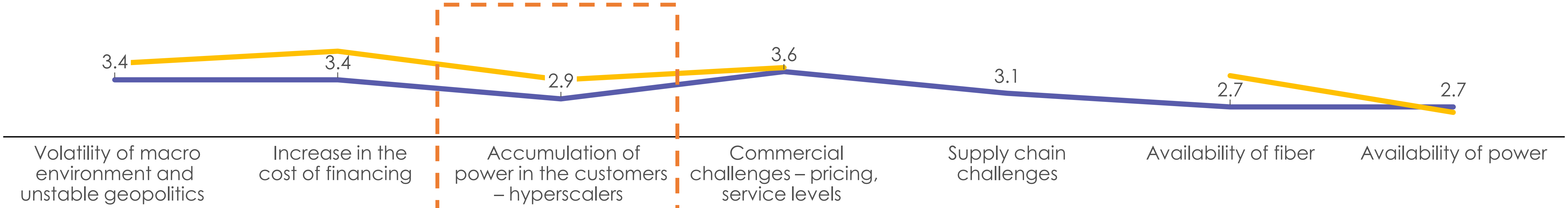
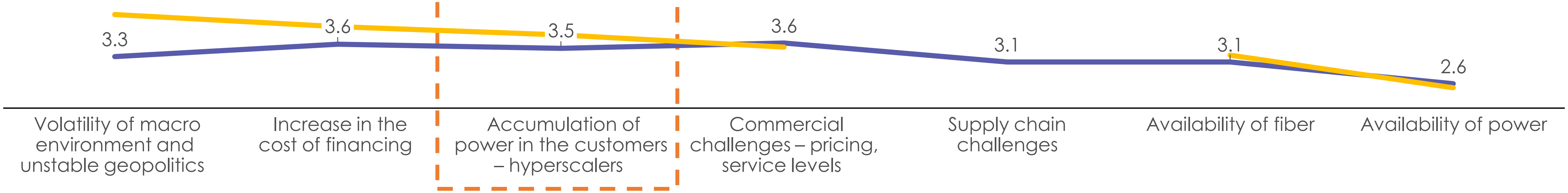
1 What are the key challenges facing terrestrial fibre investors in APAC?
(score 1-5, with 1 = low, 5 = high)



2 What are the key challenges facing subsea fibre investors in APAC?
(score 1-5, with 1 = low, 5 = high)



Note: n (APAC, 2023) = 29; n (APAC, 2024) = 18; May not add up to null responses provided

FTI DELTA

Deep dive: For terrestrial fibre, increase in the cost of financing, volatile geopolitics, and commercials are the key challenges

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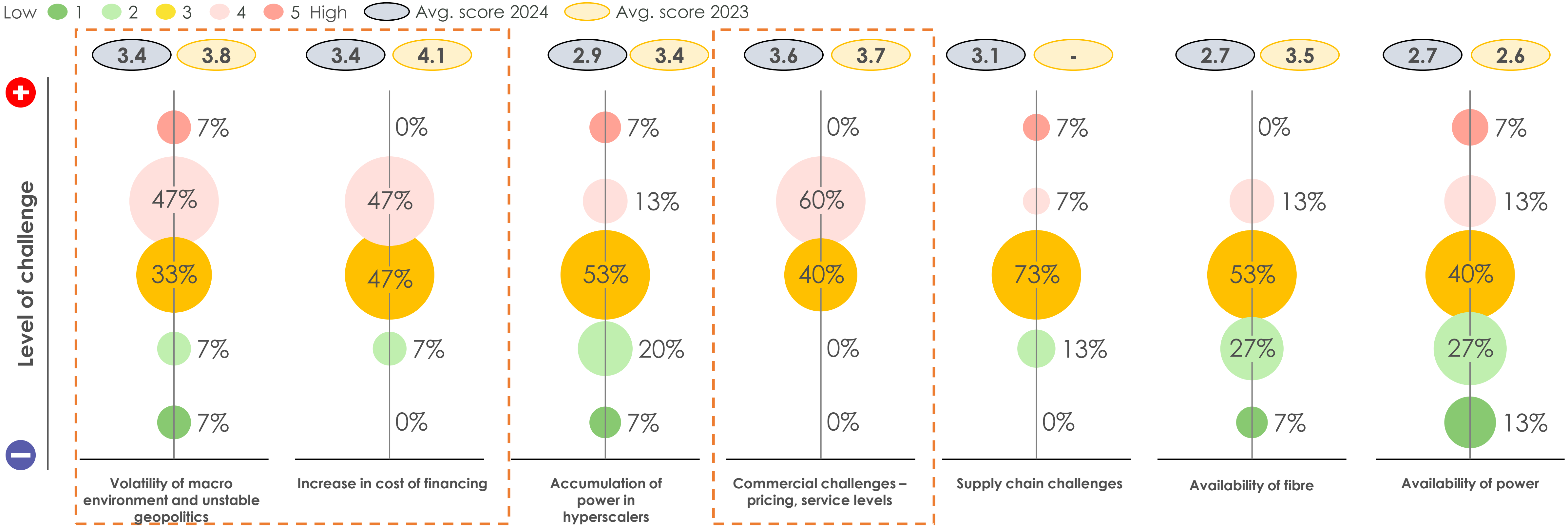
What are the key challenges facing terrestrial fibre investors in APAC?

(score 1-5, with 1 = not challenging, 5 = very challenging)



Note: n (APAC, 2023) = 29; n (APAC, 2024) = 18; May not add up to null responses provided

FTI DELTA

Deep dive: For subsea, increase in the cost of financing, power of hyperscalers and commercials are also key challenges

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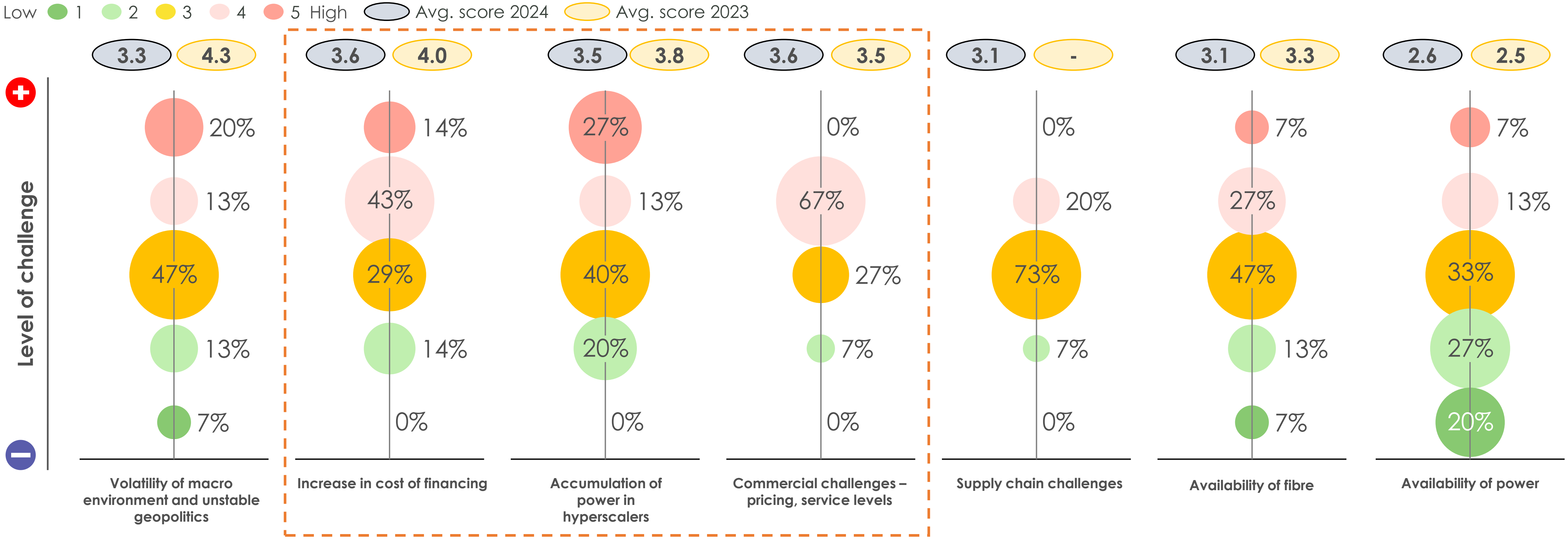
What are the key challenges facing subsea cable investors in APAC?
(score 1-5, with 1 = not challenging, 5 = very challenging)



Note: n (APAC, 2023) = 29; n (APAC, 2024) = 18; May not add up to null responses provided

Summary of discussion

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01	Strong optimism in digital infrastructure is driven by AI trends and demand	• Investor optimism is fueled by anticipated demand from AI workloads, cloud and content localization • However, optimism is balanced by increased financing costs, IRR expectations, and barriers to entry • There is potential for new digital infra. monetisation models for AI use-cases, but remains to be proven • Skepticism exists around actual demand levels from AI workloads and ability for supply to keep pace
02	Terrestrial fibre investments are evolving but face distinct challenges	• Potential for increased fiberisation from new DCs, but requires power infrastructure challenges to be resolved • Legacy fibre networks unsuitable for AI/cloud use-cases; potential for new fibre investments • Fibre networks need to 'scale-on-demand' and be 'built-to-change' to accommodate AI/cloud needs
03	Demand for diversified subsea routes to grow, but hyperscalers remain a challenge	• Demand for subsea route diversification is expected to remain, given geopolitical dynamics in APAC • Increased demand for connectivity to regions with more power and land availability for DC deployments • Inter-regional capacity shortages persist, with delays in new cables like Bifrost adding pressure • Partnerships and consortiums are becoming essential for cost sharing and negotiating power in subsea builds

Agenda

Digital Infra Leaders Summit

01

Scene Setting: Industry Economics and Key trends

02

Deep Dive 1: Investor sentiment & Digital infrastructure partnership models

03

Deep Dive 2: The new Energy security paradigm

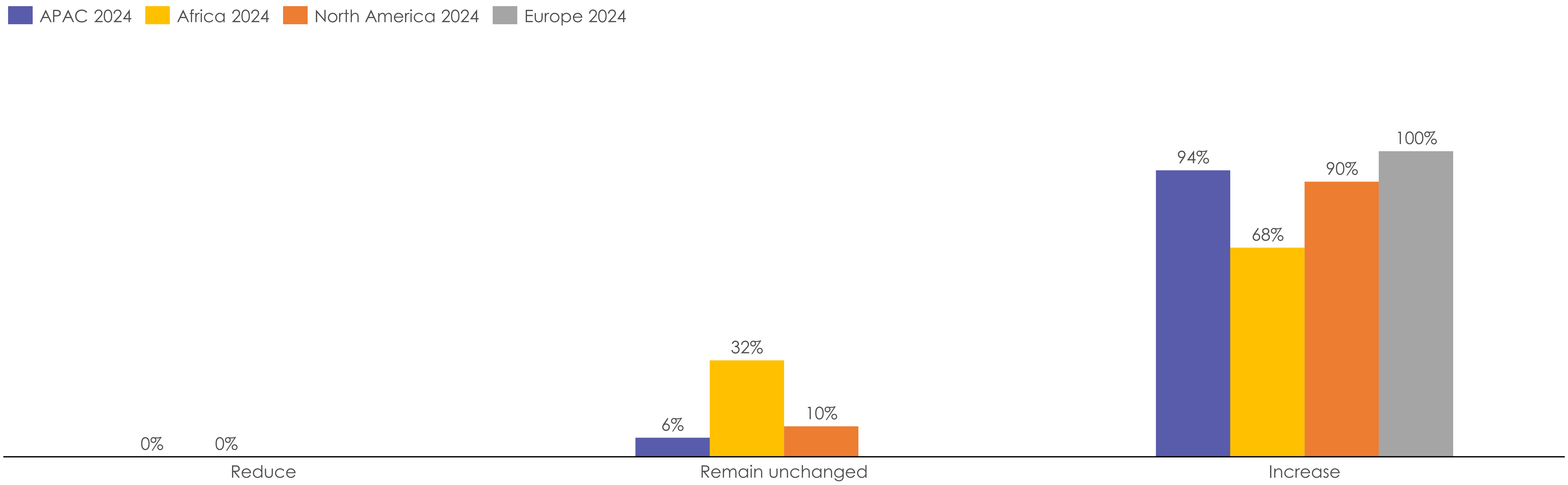
04

Wrap-Up: Identifying Collective Industry Priorities

Unsurprisingly, expectations are that power supply will increase and still be relevant

Digital Infra Leaders Summit

How will the relevance of power supply for digital infrastructure change over 2024-2025?



Note: n (APAC, 2024) = 16; n (Africa, 2024) = 20; n (Europe, 2024) = 24; n (NA, 2024) = 21; May not add up due to null responses provided

88% of respondents reaffirm to focus on improving energy efficiency

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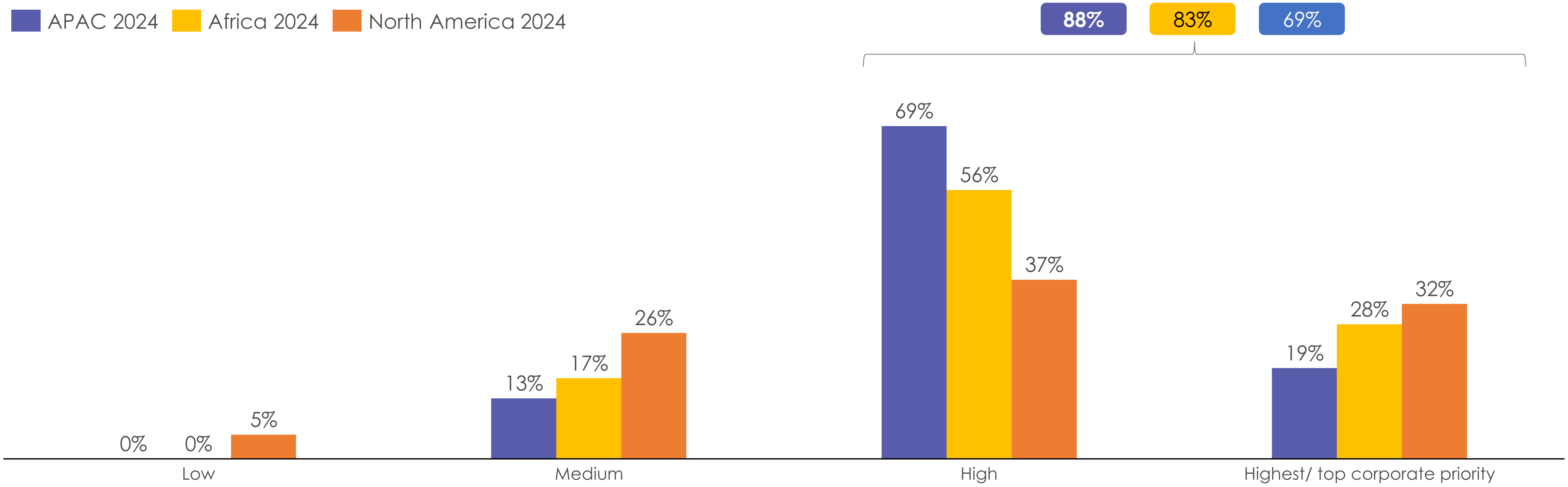
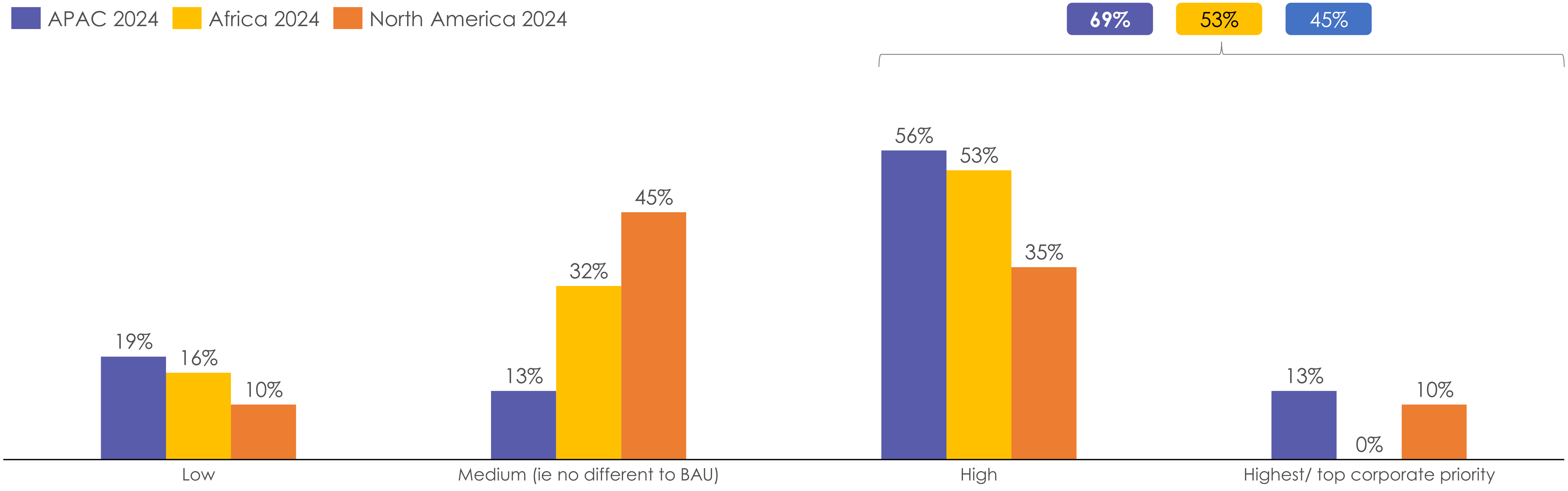
How big a focus does the company have on improving energy efficiency?



Note: n (APAC, 2024) = 18; May not add up to 100% due to rounding and/or null responses provided

~70% of respondents believe adapting to a green energy supply is high priority

What is the current level of priority for adapting to a green energy supply?



Note: n (APAC, 2024) = 18. May not add up to 100% due to rounding and/or null responses provided

Few have high confidence that there is sufficient access to affordable green energy

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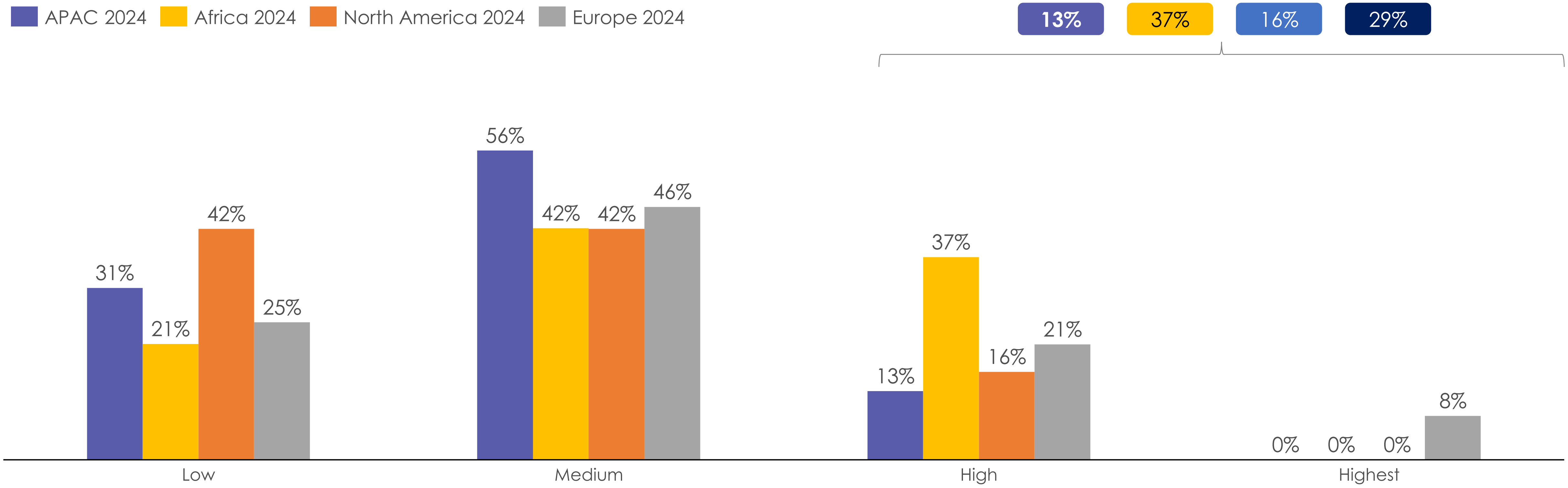
What level of confidence do you have today that you will be able to access sufficient green energy at affordable prices for your current business model?



Note: n (APAC, 2024) = 18. May not add up to 100% due to rounding and/or null responses provided

Energy and capacity upgrades are the top priorities for CAPEX allocation

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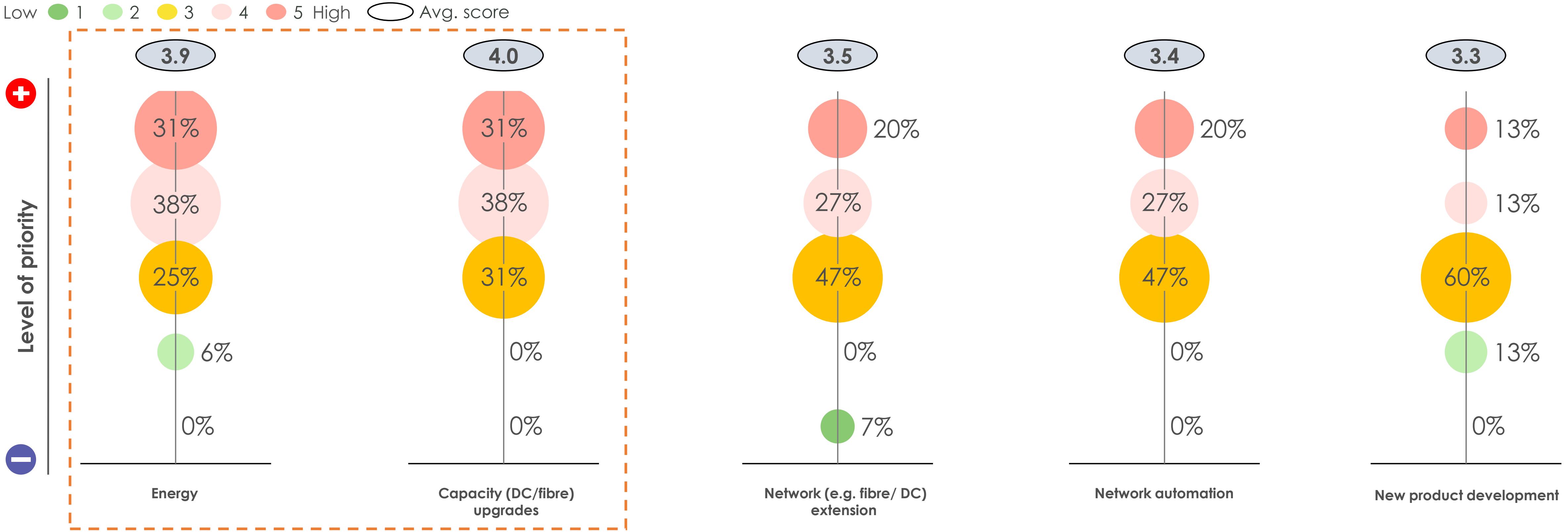
What level of priority are the following areas receiving for CAPEX allocation

(score 1-5, with 1 being lowest priority and 5 being highest priority)



Note: n (APAC, 2024) = 18; May not add up to 100% due to rounding and/or null responses provided

Working with utility partners, signing with IPPs, and investing in own generation are critical to avoid power becoming a limiting factor

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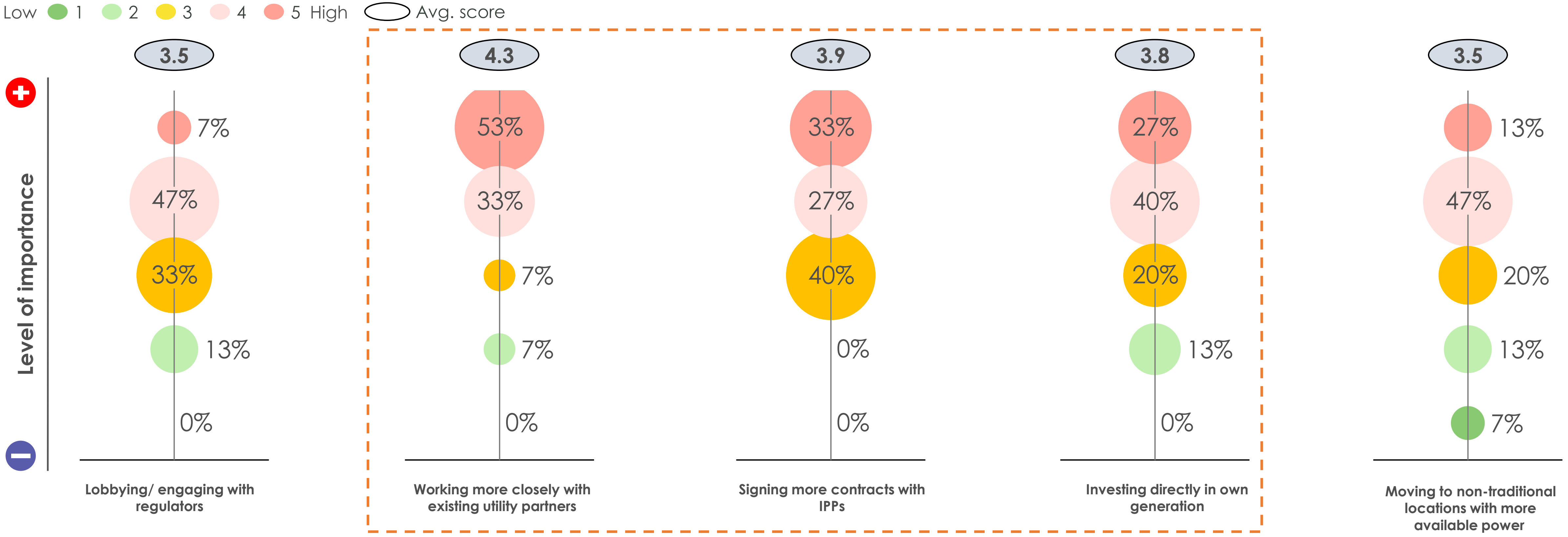
To avoid power becoming a limiting factor in your growth, what will be the most important strategies (score 1-5, with 1 = low and 5 - high)



Note: n (APAC, 2024) = 18; May not add up to 100% due to rounding and/or null responses provided

Summary of discussion

Digital Infra Leaders Summit

01 **Development of power infrastructure remains a key challenge for the region**

- Power requirements are expected to grow in tandem with continued DC demand from AI, cloud, and content
- Development of adequate power infrastructure remains a key focus to meet this increased demand
- Political instability, weak regulations, and cost barriers are slowing infrastructure deployment in key markets

02 **Green power is important, but requires rapid evolution of policies & regulations**

- Availability of renewable energy varies across regions; high costs & regulatory barriers remain limitations
- There is consensus that traditional energy sources are needed to supplement renewable energy in the short-medium term, but will increasingly face pressure from investors and customers
- DC operators are investing in their own renewable power generation (e.g. solar), but still face regulatory hurdles

03 **The future of energy supply will reshape digital infrastructure ecosystems**

- Hyperscalers will play a big influence in energy supply topologies by driving demand & dictating supply locations
- An increase in low-latency AI use-cases (e.g. inferencing) may shift the power demand to the edge
- The impact of AI on internet economics and future business models remains uncertain
- Potential for operators to explore backwards integration for margin expansion, energy security in future

Our agenda today

Digital Infra Leaders Summit

01

Scene Setting: Industry Economics and Key trends

02

Deep Dive 1: Investor sentiment & Digital infrastructure partnership models

03

Deep Dive 2: The new Energy security paradigm

04

Wrap-Up: Identifying Collective Industry Priorities

Sustainability and power supply management are the key priorities for APAC

Digital Infra Leaders Summit

Within the digital infrastructure sector, what is the top priority for the next 12 months to ensure continued growth?

Last year	This year
Funding and business models for to achieve target IRRs sufficient to counter increased costs for borrowing	Availability of power preferably green energy
Supply chain returning to pre-pandemic levels	Evolving technology which translates into adaptive product offerings
Ensuring consistent supply of capacity	Scalability and deep focus on Sustainability
Ensuring reliable and sufficient supply of power	Creating speed, scale and certainty for our customers
Meeting sustainability targets and requirements	Availability of power
Governments being able to meet power capacity needs	Ability to accumulate fibre access & capability

Note: n (APAC, 2023) = 29; n (APAC, 2024) = 18; May not add up to 100% due to rounding and/or null responses provided

Capturing demand from AI and resolving green power requirements offers the greatest potential for future value creation

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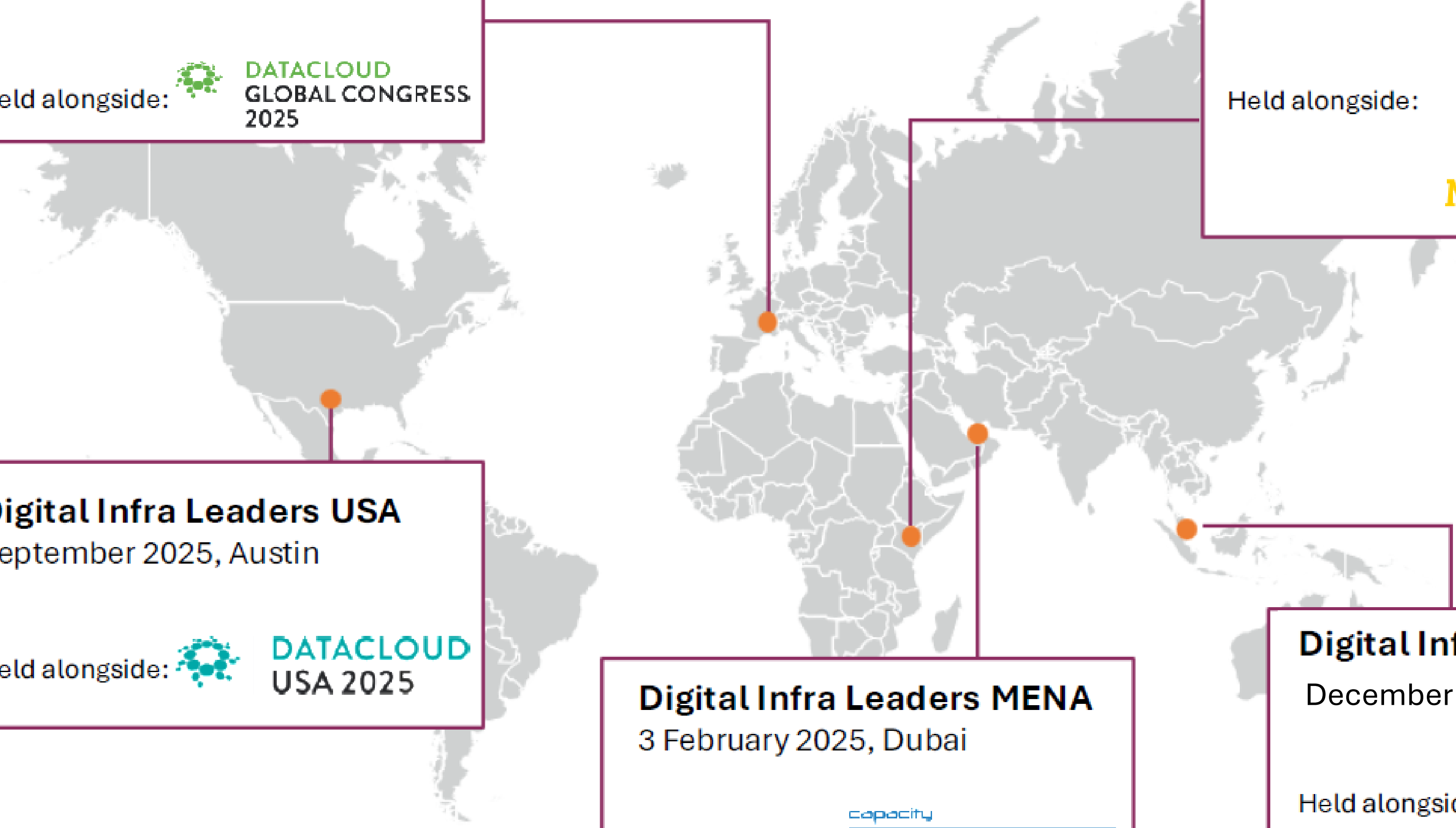
As an investor / operator in the digital infrastructure industry, where do you see the greatest potential for future value creation and how are you addressing these opportunities?

Last year	This year
Creating a DC platform which can cater to the growing and evolving needs of AI capacity	To involve and contribute to the digital evolution and development around the globe
Identifying the demand for digital ecosystem and focus on the ecosystem creation, rather than the infrastructure itself	Investing in future inventory and designing to new requirements required for AI
Enabling "Everything as a Service" through automation	Innovation in design and operating at scale
Being more intentional w.r.t. sustainability throughout the full lifecycle of digital infrastructure assets	AI workloads and green energy adoption
Edge data centres across tier 2 cities in APAC	Power hubs and combined DC campuses
Harnessing the scale required by global cloud companies in their data centre builds	Renewables supply and integration

Note: n (APAC, 2023) = 29; n (APAC, 2024) = 18; May not add up to 100% due to rounding and/or null responses provided

2025 calendar



Digital Infra Leaders Europe
3 June 2025, Cannes

Held alongside: DATACLOUD GLOBAL CONGRESS 2025

Digital Infra Leaders Africa
September 2025, Nairobi

Held alongside: itw Africa

Tower Xchange Meetup Africa

Digital Infra Leaders USA
September 2025, Austin

Held alongside: DATACLOUD USA 2025

Digital Infra Leaders MENA
3 February 2025, Dubai

Held alongside: capacity MIDDLE EAST 2025

Digital Infra Leaders Asia
December 2025, Singapore

Held alongside: itw Asia

About the organisers

With deep and long-standing networks spanning the entire digital infrastructure community, the Digital Infra Leaders Summits are a collective effort of techoraco's Capacity Media, Datacloud, the GLF, ITW and TowerXchange

capacity
a techoraco brand

Capacity Media is the premier and most trusted source of information and networking for those #KeepingTheWorldConnected, made up of the global connectivity and digital infrastructure communities.

Through our world-renowned series of large scale and regional events, awards, our print products such as Capacity Magazine, our daily digital news coverage, Capacity TV channel, and executive podcasts; Capacity Media is your authority on the latest developments shaping the industry of tomorrow.

Our eminent events portfolio includes International Telecoms Week (ITW), the Capacity series, Metro Connect and the Global Carrier Awards. Join us in our mission to connect people and communities across the global digital infrastructure industry.

https://www.capacitymedia.com/

DATACLOUD
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Datacloud exists to facilitate the growth of the global IT infrastructure ecosystem. From investment, to design, through to operation, our network reaches the full life cycle of the data centre, cloud, edge, finance, and big tech industries.

Through our slate of global events we provide thought-leadership directly from the most senior leaders in our space, and unique networking opportunities around the world.

We understand the importance of data infrastructure in modern society, and we believe in the power of connections

https://datacloudseries.com/

GLF community

The GLF is a membership organisation that provides a single voice to the broader digital ecosystem, ensuring alignment amongst international connectivity leaders for industry transformation. Our mission is to provide leadership to the industry that is #KeepingTheWorldConnected based on the principles of interoperability, connectivity, and value creation.

www.itwglf.com

itw
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International Telecoms Week (ITW) is the world's largest annual meeting for the global connectivity community to meet, learn and conduct business. Uniting decision makers from across the telecoms and ICT Infrastructure ecosystem, this is a must-attend event for anyone who is enabling and pioneering the future of communication.
In 2023, we expanded our horizons and bringing you ITW Africa! The only event in Africa where you can meet the entire infrastructure value chain, including cloud, finance, satellite, and carrier providers.

www.internationalteleomsweek.com

TowerXchange
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TowerXchange is the market leader in telecom tower industry market intelligence. Our premium data sets and industry reports are trusted by towercos, MNOs, investors, equipment vendors and solution providers.

Our annual series of Meetups represent the most important date on the calendar for tower industry professionals and have been assembling CXOs and the who's who in digital infrastructure for over a decade

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