

THE INDO-PACIFIC CONNECTIVITY OPPORTUNITY

Where Infrastructure, Capacity and Demand Converge

EXECUTIVE SUMMARY

The Indo-Pacific is entering an important new phase of digital infrastructure development.

Population scale, artificial intelligence, cloud adoption, data center expansion and continued investment in subsea and terrestrial fiber are reshaping how capacity moves throughout the region.

Indonesia sits at the center of much of this opportunity. With a population of 285.7 million in 2025, Indonesia represents significant scale in its own right. Its position between established digital hubs in Asia and Australia makes the country equally important from a connectivity perspective.

At the same time, new infrastructure is changing the regional map. Batam is developing into a strategic digital infrastructure location adjacent to Singapore. New subsea systems are creating additional capacity and route options. Australia has activated one of its most significant domestic subsea infrastructure investments in decades. Across the region, carriers, data center operators, hyperscalers and infrastructure providers continue to invest in the networks required for the next generation of digital demand.

But infrastructure alone does not complete the connectivity equation.

The opportunity is increasingly about connecting demand with the infrastructure that has already been built.

That requires visibility into network reach, understanding of local market capabilities, access to the right suppliers, intelligent pricing and the expertise to translate thousands of potential network options into a solution that can be delivered.

This is where the convergence of infrastructure, intelligence and ecosystem collaboration becomes increasingly important.

1. Indonesia: Scale Changes the Connectivity Equation

Indonesia's population reached 285,721,236 in 2025, according to the World Bank.

That number matters beyond demographics. More people, businesses, applications, cloud environments and digital services create increasing requirements for the infrastructure that moves information between locations, data centers, clouds and international markets.

Indonesia's geography makes the challenge particularly interesting. Connectivity across a large, distributed market is fundamentally different from connectivity within a geographically concentrated country. International subsea capacity is only one component. Traffic must ultimately move between landing points, data centers, carrier networks and customer locations.

The result is a connectivity environment in which global infrastructure and local network reach must work together.

For the service-provider ecosystem, this creates opportunities across subsea capacity, data center interconnection, terrestrial backbone infrastructure, metro fiber, Ethernet, Dedicated Internet Access, broadband and local access networks.

No single network needs to own every component. The opportunity is to make those components work together.

Source: World Bank - Indonesia population data

<https://data.worldbank.org/country/indonesia>

2. Follow the Infrastructure Investment

One of the clearest indicators of where connectivity demand is heading is where infrastructure capital is being deployed.

Batam provides an important example. Its proximity to Singapore gives it a unique position within the Southeast Asian digital infrastructure ecosystem. Rather than viewing Singapore and Indonesia as isolated connectivity markets, it is increasingly useful to consider the infrastructure developing between them.

The Nongsa Changi Cable (NCC) is a powerful example. Telin describes NCC as a direct high-capacity subsea connection between Nongsa Digital Park in Batam and Singapore's data center ecosystem. The system contains 24 fiber pairs and is designed to provide scalable capacity supporting hyperscalers, AI workloads and growing data center concentration in the region.

In July 2026, Telin, BW Digital and Nongsa Digital Park marked the successful landing of the cable in Batam.

This represents more than another cable landing. It illustrates how the digital infrastructure ecosystem is evolving.

A cable connects two points. An ecosystem connects capacity, data centers, networks, applications and ultimately customers.

That distinction will become increasingly important as AI and cloud architectures create greater requirements for capacity, resilience and connectivity between distributed infrastructure environments.

Telin - Submarine Cable Systems / Nongsa Changi Cable

<https://www.telin.net/en/carrier/telin-cable-system>

Telin - NCC Cable Landing, July 20, 2026

<https://www.telin.net/en/company/news/telkomgroup-nongsa-digital-park-and-bw-digital-strengthen-indonesias-digital-gateway-through-the-ncc-submarine-cable-system>

Telin - Building the Ecosystem Behind Southeast Asia's Next Digital Bridge

<https://www.telin.net/en/insight/article/building-the-ecosystem-behind-southeast-asias-next-digital-bridge>

3. Singapore and Batam: Proximity Is Becoming an Ecosystem

Singapore has long held a critical position in Asian connectivity. What is changing is the infrastructure developing around it.

Batam's proximity to Singapore creates the opportunity for a broader digital infrastructure ecosystem in which data center development, subsea connectivity and terrestrial networks operate across geographic boundaries.

Telin notes that Batam is already connected to more than 15 regional and international subsea cable networks. That existing infrastructure is important. But the next stage is not simply counting cables. It is determining whether infrastructure can support the scale, performance and resilience required by modern workloads.

AI is particularly important to this discussion. As compute becomes more distributed and data-intensive applications grow, connectivity between data centers becomes increasingly strategic. The network is no longer simply transporting traffic to an application. It is becoming part of the architecture that enables distributed digital infrastructure to operate.

This changes the connectivity conversation. The question moves from “Where does fiber exist?” to “Which infrastructure can support the application, where does it connect, what network can extend it to the customer, and how quickly can it be delivered?”

That is a significantly more sophisticated problem.

Telin - The Hidden Limits of Batam-Singapore Digital Infrastructure

<https://www.telin.net/en/insight/article/the-hidden-limits-of-batamsingapore-digital-infrastructure>

4. Australia Adds Another Dimension

The infrastructure transformation extends south into Australia.

On June 25, 2026, SUBCO announced that its SMAP hypercable was Ready for Service. The system connects Sydney, Melbourne, Adelaide and Perth across approximately 5,000 kilometers. SMAP contains 16 fiber pairs and provides more than 400 Tbps of capacity.

Those are significant numbers. But once again, capacity itself is only part of the story.

High-capacity subsea infrastructure strengthens the underlying digital foundation. Creating economic value from that infrastructure requires networks and service providers capable of extending connectivity beyond the cable itself.

A subsea system must connect into landing infrastructure. Landing infrastructure must connect into carrier and data center ecosystems. Those networks must ultimately reach the locations where customers need connectivity.

This is why local, regional and global networks are complementary rather than isolated parts of the connectivity market. Each expands the value of the others.

SUBCO - SMAP Hypercable Ready for Service, June 25, 2026

<https://sub.co/news/subco-announces-smap-hypercable-ready-for-service>

SUBCO - SMAP System Overview

<https://sub.co/smap/>

5. The Infrastructure Exists. Discoverability Becomes the Challenge.

As infrastructure expands, an interesting paradox emerges. The world can have more fiber, more networks and more capacity while connectivity remains difficult to source.

The challenge is fragmentation. A global requirement may involve one provider in Singapore, another in Indonesia, a regional network in Australia and entirely different access providers at individual customer locations.

Even within the same country, network reach can vary substantially by city, building and service type. Knowing that a carrier operates in a market is not enough.

The questions that matter are more specific: Can the provider reach this location? Is the building on-net or near-net?

What service is available? What bandwidth can be delivered? What are the commercial terms? How does that option compare with other available networks? How quickly can it be priced and delivered?

This is where network intelligence becomes as important as network infrastructure.

The industry's next challenge is not simply creating more supply. It is making existing supply easier to discover, evaluate and consume.

6. Turning Thousands of Networks Into Accessible Supply

Iceblue Global operates from a simple premise: global connectivity becomes more valuable when demand can find the right supply.

Iceblue Global provides connectivity across 180+ countries, with access to 4,400+ networks and more than 50 million buildings through a technology-enabled model.

The scale is important, but the value is not simply the size of the dataset. The value comes from transforming fragmented network information into actionable connectivity options.

Technology can help identify available networks, automate pricing and accelerate decisions. Regional expertise adds another layer. A network that is ideal for one market may not be the right provider in another. Local infrastructure, commercial models and building-level reach matter.

The strongest model combines both: technology provides scale and intelligence. The ecosystem provides reach. Expertise connects the two.

Iceblue Global - Global Connectivity. Automated. (+180 countries, +4,400 networks, +50M buildings)
<https://iceblueglobal.com/>

7. From Global Infrastructure to Local Reach

Infrastructure investment may be global, but connectivity requirements are ultimately local.

A new subsea system can provide hundreds of terabits of capacity, but the customer's requirement may still begin at a single commercial building. That final connection matters.

The value chain therefore extends from subsea infrastructure to cable landing, data center, network interconnection, metro fiber, local access and ultimately the customer.

Every participant contributes something essential. For Iceblue Global, this is why the ecosystem matters so much.

The objective is not to replace the infrastructure carriers have built. It is to help make that infrastructure more accessible to global demand.

A regional fiber provider may have exceptional reach within a particular market. A global carrier may need that reach for one customer location. A data center operator may need connectivity beyond its facility. A service provider may need a network it has never previously sourced.

Connecting those requirements creates value on both sides of the transaction. Demand gains reach. Supply gains opportunity.

8. Explore the Networks Behind the Opportunity

The Indo-Pacific illustrates a broader reality about global connectivity. Different regions have different infrastructure, network ecosystems and commercial dynamics. Understanding those differences matters.

Iceblue Global helps service providers navigate that complexity by connecting requirements with network supply across markets around the world.

Explore Iceblue Global coverage by region → iceblueglobal.com/coverage

9. Intelligence Powered by Technology. Guided by Expertise.

Automation is transforming global connectivity.

Iceblue Global uses technology to automate how connectivity is designed and priced, providing access to global carrier availability and market-driven pricing.

But automation does not eliminate the need for expertise. It changes where expertise creates value.

Instead of spending time manually searching fragmented sources, connectivity professionals can focus on understanding the requirement, evaluating the appropriate infrastructure and determining the best commercial and technical outcome.

This combination becomes increasingly important as network ecosystems become larger and more complex.

The future is not technology or people. It is technology enabling experienced people to make better decisions faster.

Iceblue Global

<https://iceblueglobal.com/>

10. Looking Ahead

The Indo-Pacific connectivity map is changing.

Indonesia has reached 285.7 million people. Batam and Singapore are becoming more closely connected through new digital infrastructure. Telin's Nongsa Changi Cable brings 24 fiber pairs between Nongsa Digital Park and Singapore's data center ecosystem. Australia's SMAP system brings more than 400 Tbps of capacity across 5,000 kilometers and 16 fiber pairs.

These are not isolated developments. They are signals of a larger transformation.

More infrastructure is being built. More capacity is becoming available. Digital infrastructure is becoming more distributed. And AI, cloud and data center growth are increasing the importance of the networks connecting it all.

For the connectivity industry, that creates an enormous opportunity.

The next competitive advantage will not simply come from owning infrastructure. It will come from knowing where the infrastructure is, what it can reach, how it connects, what it costs and how to make it accessible to demand.

The fiber is being built. The networks are expanding. The capacity is coming online.

Now the opportunity is to connect it.

Connecting Demand to Global Network Reach

The world's connectivity infrastructure continues to expand. The opportunity is making that infrastructure easier to discover, access and utilize.

Iceblue Global brings together global network reach, intelligent technology and connectivity expertise to help service providers connect customer demand with the right network supply.

Explore Iceblue Global coverage by region →

Learn more about Iceblue Global →

Source Reference List

World Bank - Indonesia Data

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SUBCO - SMAP Hypercable Ready for Service

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SUBCO - SMAP

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