



GROUND REALITIES

# Infrastructure Rewired: From Capacity To Coherence

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72%



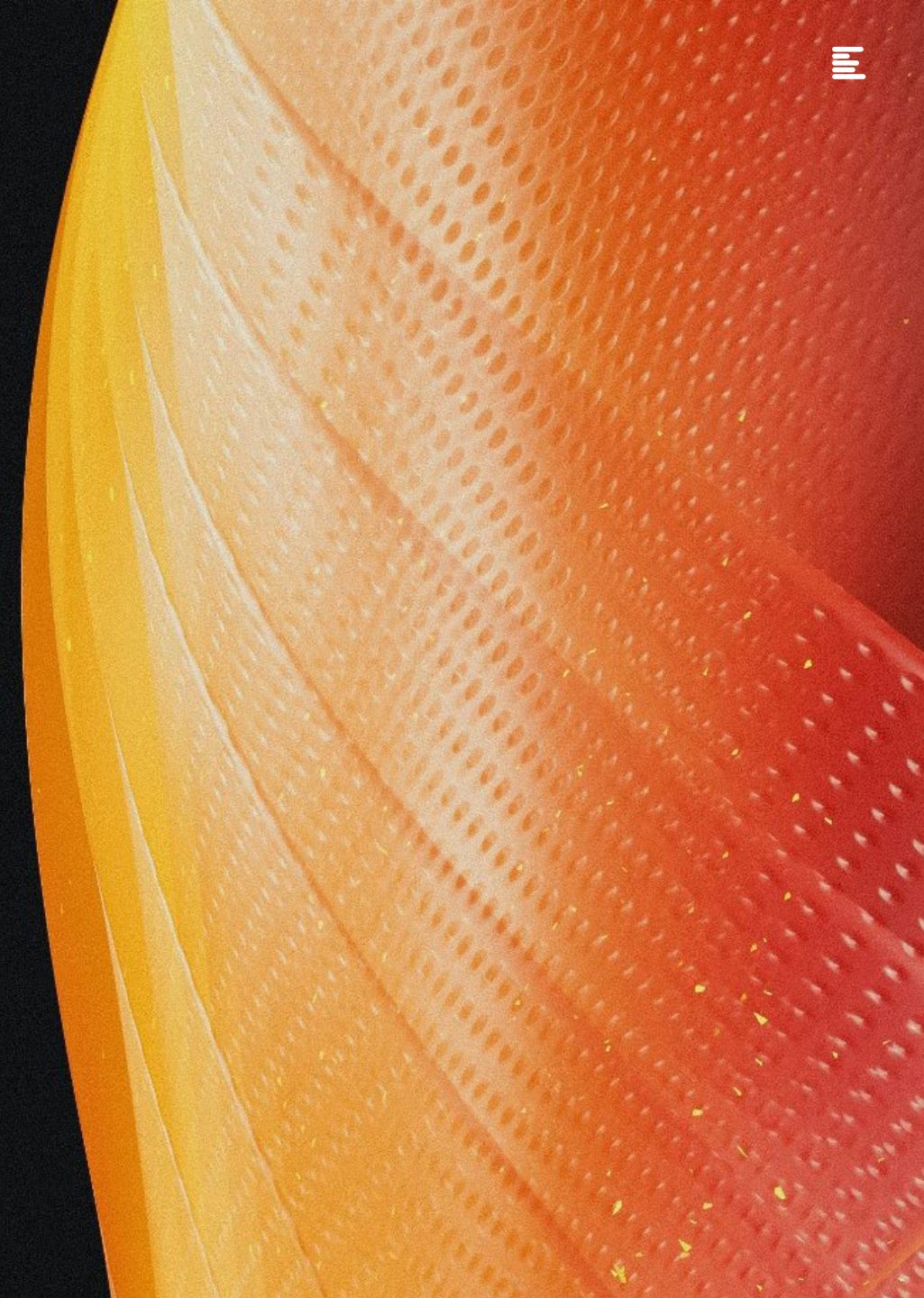
of Asia Pacific organisations expect strong AI workload growth in the next two years

While only 21%



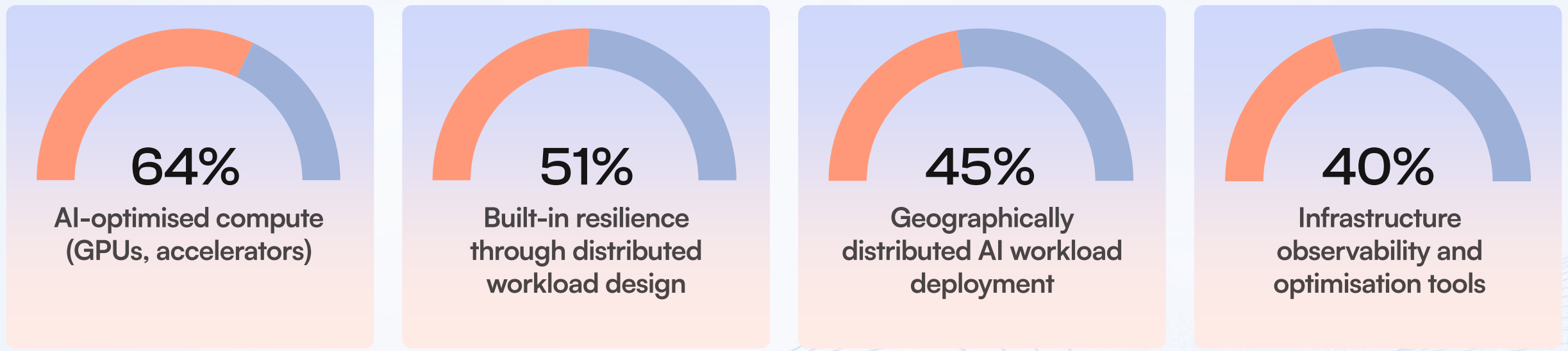
say their infrastructure can support meaningful expansion

This exposes a widening gap between ambition and readiness. AI workloads are increasingly spread across fragmented cloud, on-prem, and hybrid environments, with constraints emerging across compute, storage, and network layers together rather than in isolation.





# How Organisations are Optimising AI Infrastructure Performance in Asia Pacific

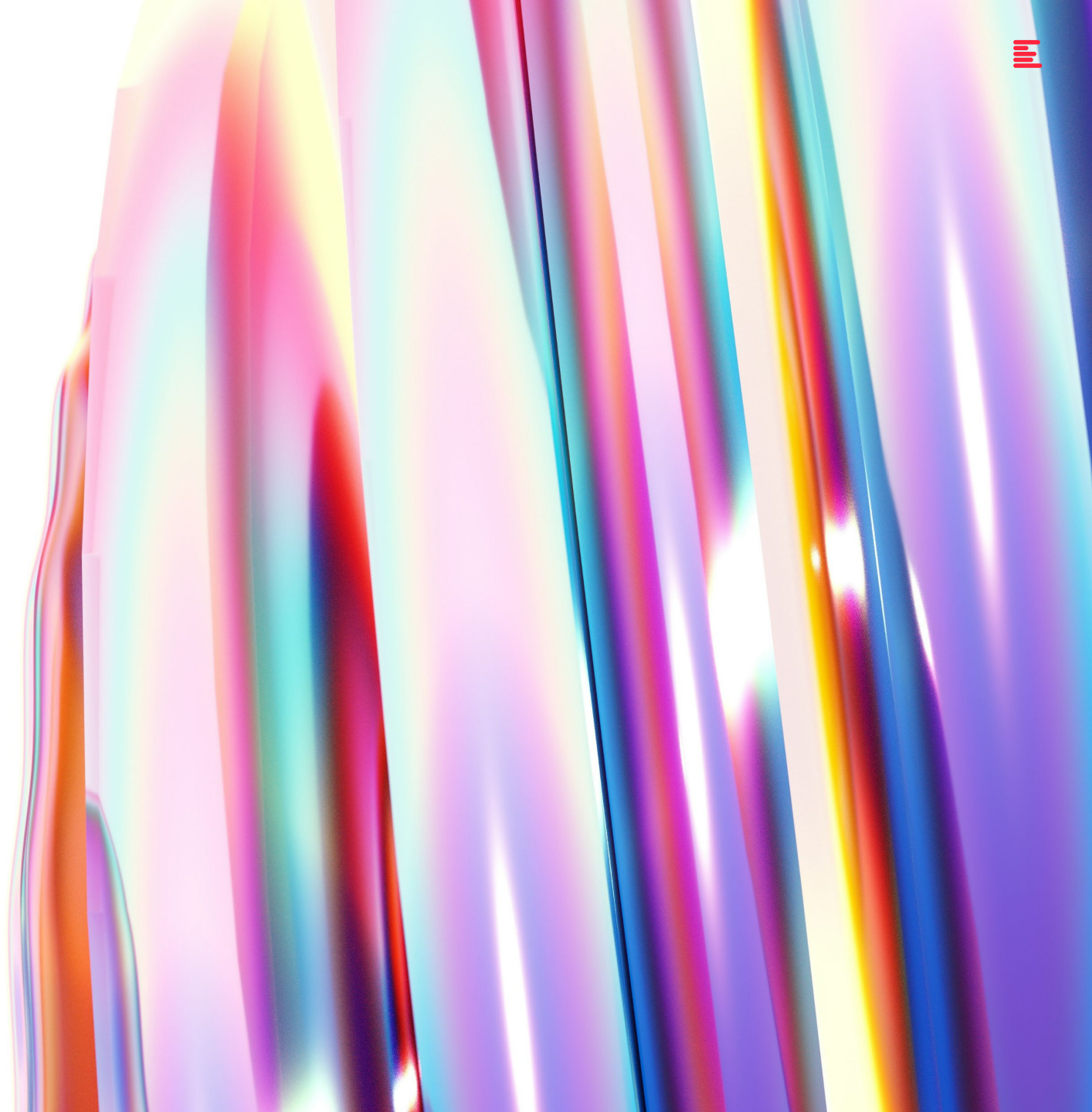


Source: Ecosystem, 2026

Investment is shifting away from full-stack replacement toward targeted improvements in how AI workloads run across distributed environments, with a focus on performance, resilience, and visibility.



**Here are 5 infrastructure trends drawn from Ecosystem research and validated through conversations with leaders across industries and markets in the region.**



# 01

## Infrastructure decisions are becoming transformation triggers

Infrastructure refresh cycles are being used to reset cloud and AI strategy, as licence renewals, platform changes, and virtualisation shifts force organisations to revisit core architecture choices.



**Decisions are increasingly driven by flexibility, workload movement, and AI readiness rather than short-term cost optimisation.**



**What started as a cost exercise became a structured clean-up of infrastructure and licences.**

**CIO, MANUFACTURING**

## 02

# Operating models are limiting scale more than technology

Delays in cloud and AI scaling are being driven by operating friction rather than technology gaps, as governance, security, and engineering teams work to different structures and speeds.



**Organisations are beginning to shift toward cross-functional product models to reduce this misalignment and improve delivery flow.**



**We need both AI capability and the ability to build the right guardrails around it.**

**HEAD OF IT TRANSFORMATION, INSURANCE**

## 03

# Hybrid environments are shaped as much by sovereignty as by architecture

Where workloads run is increasingly determined by regulation, not design preference.



**This is creating deliberately segmented environments where workload placement is determined by compliance, data residency, and cross-border rules.**



**The constraint is not cloud readiness, but whether data can leave the country and be hosted locally.**

**CISO, BANKING**

## 04

# Modernisation is funding AI expansion

AI investment is being enabled through infrastructure rationalisation rather than new budget allocation, as organisations repurpose capacity through migration, consolidation, and automation.



**Where modernisation is more advanced, it is directly improving operational efficiency and accelerating delivery of new workloads.**



**The numbers we started with versus what we actually needed to migrate were very different. We found machines and licences that did not need to be there anymore.**

**HEAD OF INFRASTRUCTURE, PUBLIC SECTOR**

## 05

## Complexity is now the primary scaling constraint

AI scale is being constrained less by infrastructure capacity and more by fragmentation across platforms, tools, and data pipelines.



**Organisations are responding by prioritising standardisation, consolidation, and observability to reduce friction in how environments operate together.**



Simply moving the module is not easy anymore. There are **interfaces, thousands of lines of code, and hidden bolt-on applications sitting behind the scenes.**

**HEAD OF ENTERPRISE SYSTEMS,  
E-COMMERCE**



# Closing the Data Governance Gap

Across Asia Pacific, the constraint is shifting from infrastructure capacity to how well cloud, on-prem, and hybrid environments work together under AI demand. Friction is showing up in data movement, integration, and execution across teams.

Tech providers are seeing demand shift toward improving integration, visibility, and management across these environments.

For more Ecosystem Insights, visit



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