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Platform orchestration in Asia Pacific

The new source of competitive advantage



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Your product is not your value proposition

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Your product is not your value proposition

For most of business history, your competitive advantage was a function of what you made and how efficiently you made it. You engineered something better than your competitors, sold as much of it as you could and the transaction marked the end of the story.

In the digital era, the terms of competition have changed and the transaction is now a starting point, not an endpoint. Software platforms such as app stores, enterprise marketplaces and the super apps that now define commercial life in much of Asia Pacific have shown that value does not have to reside in the product itself. It can come from an ongoing customer relationship, or the data the product generates, spreading into the wider ecosystem the platform connects.

We see this playing out in virtually every established industry in the region, and the implications for incumbents are more urgent than most have yet acknowledged.

Consider what this looks like from the customer's perspective.

A consumer's most frequent interactions with their bank may come through a retailer's checkout, a property portal or a ride-hailing app rather than the bank's own branch or application. The bank provides the capital and the compliance infrastructure; another company owns the relationship and sets the terms of the experience.

An automaker completes a vehicle sale, but the recurring revenue from navigation services, over-the-air updates, charging networks and in-car commerce flows to whoever controls the interface and the data. The product still sells. The enduring value accumulates elsewhere.

This is competition between ecosystems, not between products — and the rules are fundamentally different.

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The new source of competitive advantage

The platform advantage that matters today is not primarily about internal efficiency but being able to orchestrate exchanges between customers, partners and intermediaries you do not own.

Earlier waves of digital transformation focused on joining up an organization's own systems to drive down cost and accelerate speed to market. That work remains important, but it is no longer the source of durable differentiation.

The business that holds the orchestration layer — where customers, partners and data converge — owns the relationship, opens recurring and adjacent revenue streams, and can take new propositions to market at a pace that product-centric rivals cannot match. Far-sighted leaders are pursuing this position proactively, even as platform-first entrants move into their markets. The risk of disintermediation is real, but so is the upside for those who move with intent.

AI, and agentic AI in particular, makes this orchestration viable in ways that were not fully predictable even three years ago, and at a scale that was previously impractical. Far beyond recording transactions and aggregating data, platforms can now anticipate customer needs, recommend actions in real time and increasingly act autonomously on the customer's behalf.

> "The platform is no longer a passive infrastructure layer; it is becoming an active participant in the value chain."

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Nowhere is the platform imperative more immediate than in Asia Pacific

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Nowhere is the platform imperative more immediate than in Asia Pacific



The platform concept is already established here in ways that other regions are still attempting to replicate. Hundreds of millions of consumers and businesses across the region use super apps and embedded-finance experiences for financial services, retail and mobility.

The opportunity here is proven, but Asia Pacific (APAC) is one of the most structurally complex regions in which to build a platform at scale. Each market has its own data localization rules, financial regulations and digital infrastructure standards. If you want to operate in this "market of markets," your central technical and legal challenge is data sovereignty, and it is not primarily a compliance matter. You cannot orchestrate an ecosystem across APAC markets without first resolving where data lives, how it moves and who is permitted to act on it.

Private and sovereign AI is the platform-strategy question that sits at the heart of executive decision-making.

Our global research data confirms this: Nearly 66% of AI leaders in APAC already cite cross-border data restrictions as a major challenge, and 94% of organizations in the region consider sovereign or private AI to be important to their AI strategy. However, only 30% are prioritizing sovereign AI in a concrete, near-term way.[1]

Most organizations have identified the constraint, but the majority have not yet built for it. That gap between intent and action is an opening for incumbents with the discipline to close it — and for disruptors willing to build around those who can't.

[1] NTT DATA. 2026 Global AI Report: A Playbook for Private and Sovereign AI

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What leaders are doing differently



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What leaders are doing differently

Creating a platform ecosystem depends less on any single technology and more on how your organization thinks, moves and builds. Across Asia Pacific, we see the same three habits consistently distinguishing the leaders from those who are still deliberating:



1. They leverage the assets they already hold

They use regulated licenses, institutional trust, proprietary data and long-term customer relationships to claim an orchestration or embedded-partner role for the business rather than being the low-margin infrastructure behind someone else's platform.
In practice, this means organizing around the customer relationship rather than the product line, and accepting that the most valuable competitive position is no longer the one closest to the transaction.



2. They have reconfigured how decisions are made

Whether they are new entrants or established organizations reinventing themselves, platform leaders operate at a pace that traditional governance models cannot sustain. They accept that they're operating with incomplete information, so they choose to partner rather than build. They no longer wait to get everything perfect internally but instead ship and improve iteratively.
Without this change of operating tempo, even the most sophisticated architecture still moves at the old speed.



3. They build the technical foundations for orchestration from the start

This means composable architecture, unified and governed data, and OpenAPI connectivity designed for ecosystem participation rather than internal optimization. Critically, they treat data sovereignty and trust as design principles, embedding governance early, modernizing infrastructure in parallel with AI investment, and reassessing cloud dependencies to preserve the flexibility and control that regulated ecosystems require.

This is not yet where most organizations stand. Only 40% of APAC organizations report high confidence in their cloud security posture. More than half cite integration complexity in hybrid environments as a leading challenge when deploying AI in a sovereign or private configuration. The leaders who close that gap are rewarded for it: NTT DATA's research links this disciplined architectural approach to measurably stronger revenue growth and improved margins. Architecture now matters as much as algorithms. Sovereignty is becoming the foundation for trusted, scalable AI — not a brake on it.

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NTT DATA Advisory Services: Strategy before technology

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NTT DATA Advisory Services: Strategy before technology

The hardest part of the platform shift is the strategy that comes before your technology investment. You need to decide where to play in the ecosystem, which role to defend over time, which partnerships to pursue and what it will genuinely require to sustain a position at the orchestration layer rather than beneath it.

Executing that strategy in Asia Pacific is more complex than in any comparable region, and we know because we have made this transition ourselves — integrating businesses, deploying zero trust architectures at scale and consolidating fragmented systems onto common platforms. We are not advising on a journey we have only observed from the outside.

What we know for certain:

- The region's diversity means a platform strategy must be designed to operate across a wide range of markets simultaneously. Each has distinct regulatory environments, consumer behaviors and infrastructure maturity.
- It must also be built to adapt. Because the AI landscape continues to evolve on a cycle measured in months rather than years, a platform strategy cannot be set once and executed against a fixed plan.
- Most established organizations require structured support to make the transition. The agility that platform competition demands is as much a shift in operating model and cultural mindset as it is in technology.

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Why NTT DATA Advisory Services is uniquely positioned to help

Because we've navigated the same shift ourselves, we can demonstrate what good looks like, in practice, in our own business. We have a deep understanding of local markets and regulatory environments across Asia Pacific, and we have a global delivery capability — a combination that few advisory partners can authentically offer.

Our 150-year track record provides the institutional credibility that regulated industries require. NTT DATA is part of NTT Group, which invests more than $3 billion in R&D annually, keeping us close to where technologies are heading before they arrive in the mainstream.

The move from products to platforms is happening. Where do you choose to be — orchestrating the ecosystem, or providing the infrastructure beneath someone else's?

Discover how NTT DATA's Advisory Services can help you build the strategy, AI foundations and ecosystem capabilities to create a platform advantage.

Visit nttdata.com to learn more.

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