



\$1T ASEAN digital economy by 2030
\$2T with progressive DEFA rules¹
27% CAGR² ASEAN digital economy

\$15.7T to global economy by 2030
from AI³
1.2% increase to global GDP by 2030⁴

1. McKinsey

2. Google-Bain-Temasek

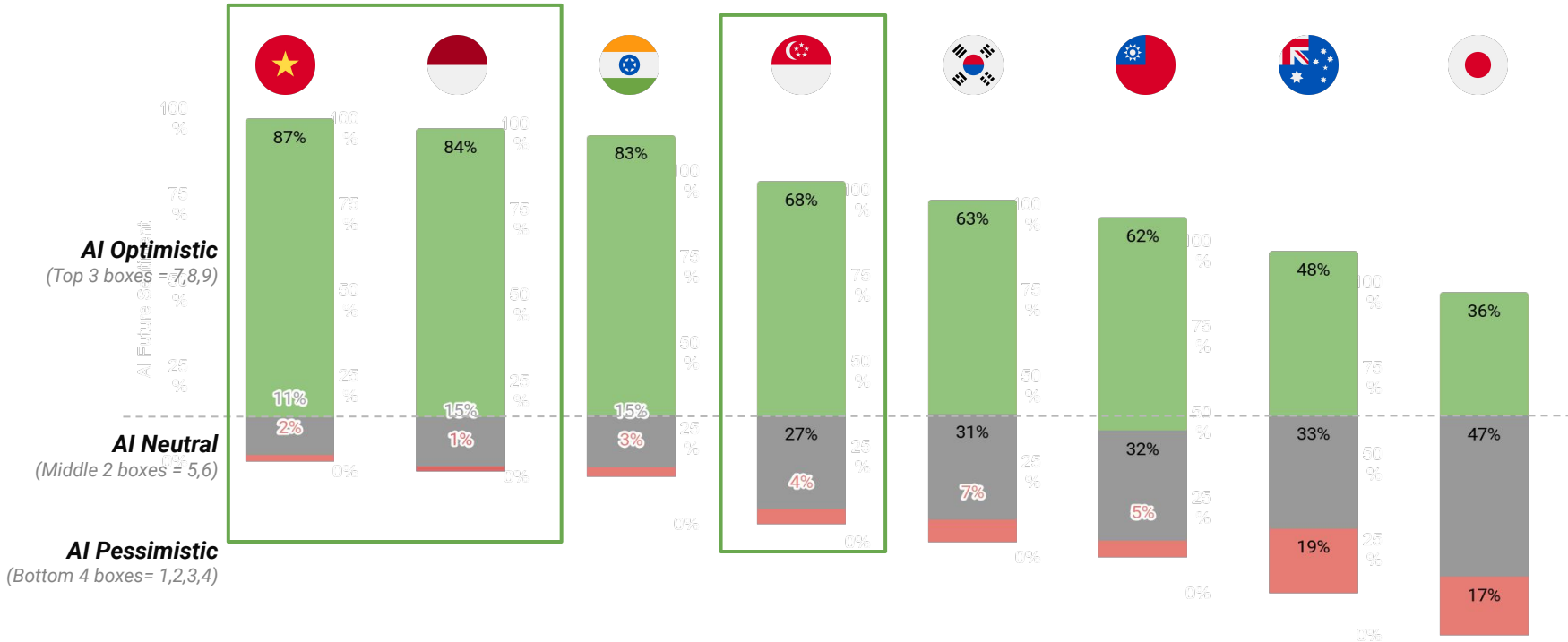
3. World Economic Forum/PwC

4. European Parliament



Countries in SEA are highly optimistic towards AI

E1. Thinking about artificial intelligence (AI), how do you feel about the future of AI in your country over the next five years?



Opportunity in application layer

- Large population
- Internet penetration

User Layer

- Scaled developer ecosystem
- Dynamic tech friendly population
- Positive regulatory framework

Application Layer

- Deep capital investment
- Deep AI R&D base
- Global tech companies
- Leading global academic institutions

Foundation Layer

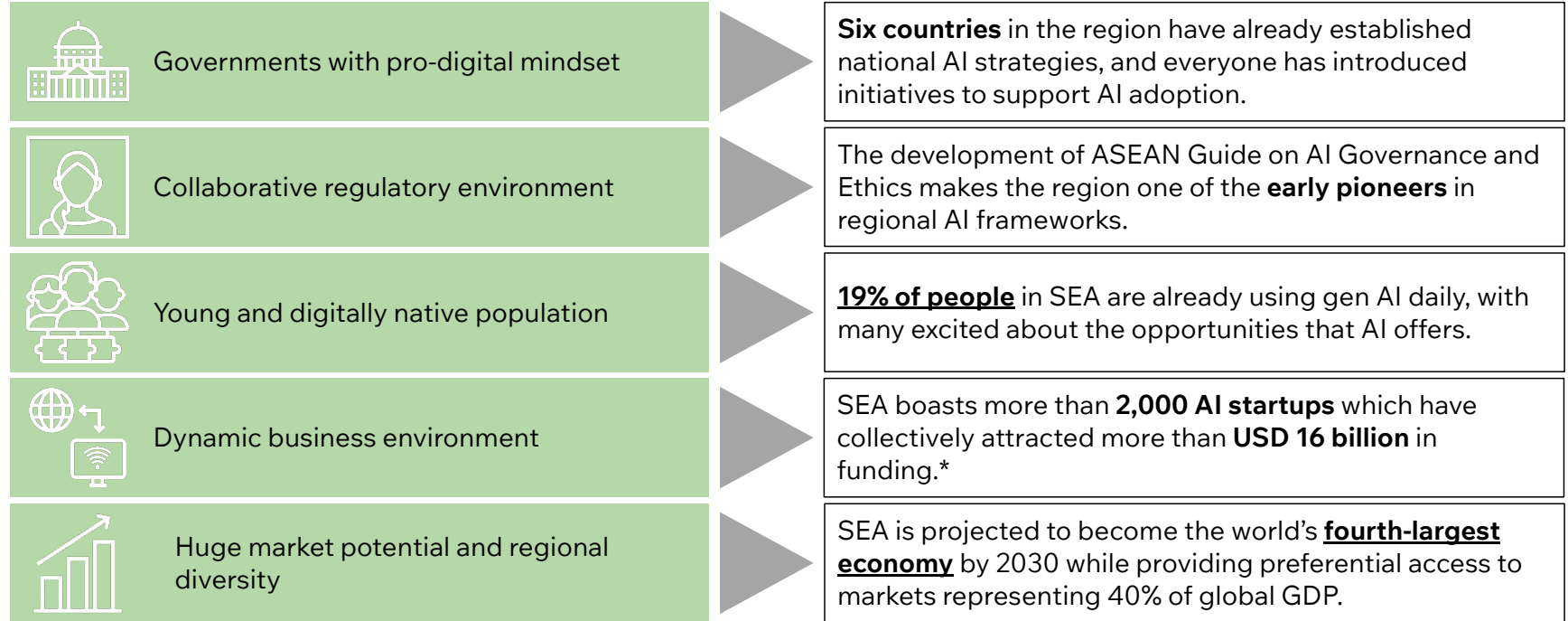
Deployment

Development



Southeast Asia's AI advantage

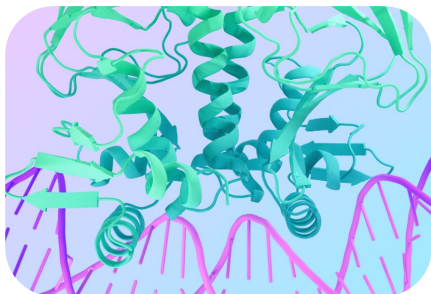
The benefits of pursuing greater AI adoption is huge. SEA's unique advantages, characterized by its governments with pro-digital mindset, collaborative regulatory environment, young and digitally native population, dynamic business environment, and huge market potential, makes the region well-positioned to be a leader in AI adoption.



Globally, AI is driving progress towards all 17 SDGs

SDG 3

Good Health and Well Being



In 2024, together with [Isomorphic Labs](#), we introduced [AlphaFold 3](#), which predicts the structure and interactions of all of life's molecules.

SDG 4

Quality Education



[Read Along](#): Google's speech-based reading tutor app, allows students to learn by reading aloud.¹

SDG 13

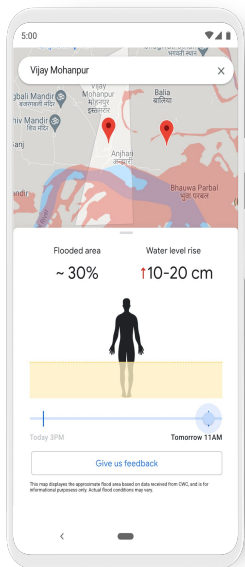
Climate Action



[Flood Hub](#), a Google Research initiative on food forecasting, provides actionable information to help individuals stay safe and allow communities to plan ahead

AI Opportunities | Examples

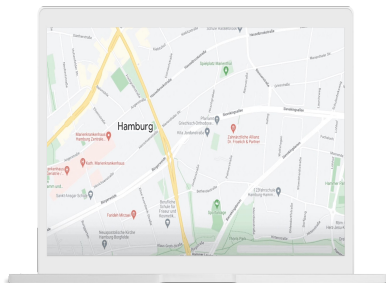
Forecasting floods



Flood Hub covers river basins across **80 countries worldwide**, providing critical flood forecasting to over **1,800 sites** and a population of **460 million people**.

Within ASEAN, Flood Hub is available in **Cambodia, Laos, Myanmar, Thailand and Vietnam**

Reducing traffic and travel emissions



Green Light, a Google Research initiative, uses AI and Google Maps driving trends to **model traffic patterns**, helping reduce stop-and-go traffic and **improve traffic flow** in cities. We pilot this initiative in **Jakarta and Bali, Indonesia**

Helping to prevent blindness



Google's **Automated Retinal Disease Assessment (ARDA)** uses AI to help healthcare workers detect diabetic retinopathy at scale. We are piloting this in **Thailand**.

AI-first company since 2017

Building on our decades of research and development, we're now seven years into our journey as an AI-first company.

At the heart of this is a vision to make AI more helpful for everyone, in a way that's accessible and responsible for all.



2017
Transformer



2018
BERT



2018
AlphaFold



2019
T5



2021
LaMDA



2022
PaLM



2023
Bard

Reinforcing our commitment to responsible AI

We were among the *first* companies to publish [AI Principles](#) in 2018.

AI **should**:

- 1 be socially beneficial
- 2 avoid creating or reinforcing unfair bias
- 3 be built and tested for safety
- 4 be accountable to people
- 5 incorporate privacy design principles
- 6 uphold high standards of scientific excellence
- 7 be made available for uses that accord with these principles

Applications we **will not** pursue:

- 1 likely to cause overall harm
- 2 technologies primarily intended to cause injury
- 3 surveillance violating internationally accepted norms
- 4 purpose contravenes international law and human rights



An Affirmative AI Policy Vision



Invest in Innovation Infrastructure

At the national level

Invest in R&D and AI infrastructure

E.g. cloud infrastructure, open government data sets including through public-private partnerships

Build an interagency apparatus to formulate national AI frameworks

AI is a cross-cutting technology that will implicate multiple equities and interests within a government

Establish policy frameworks that enable responsible innovation

E.g. Copyright frameworks that support innovation and creativity; privacy and security by-design principles; risk-based approaches to regulation

At the Regional level

Public - private partnerships and investment

Enabling regulatory frameworks, open data sets

Build an AI-ready workforce

At the national level

Modernise skilling programmes

Ensure AI is embedded as core component of education and professional development systems

Help educators develop AI literacy

E.g. through targeted training programmes with industry

Support workers in transition

E.g. through targeted training programmes with industry

At the Regional level

Develop a comprehensive regional AI Skilling roadmap

Exchange, design and scale best practices in AI skilling

60 million

People in APAC trained in digital skills by Google

Gemini Academy

Gemini Academy is an outreach program launched by Google to train teachers on AI proficiency, and how to use Bard and AI safely and responsibly. Gemini Academy has been launched in **Indonesia** and **Thailand**, and has trained over **2,000** and **5,000** K-12 teachers respectively. We are planning to expand Gemini Academy to more ASEAN markets.



AI Policy & Skilling Lab

Key activities

AI policy discourse



AI opportunity



Partnerships



AI Policy & Skilling Lab

Objectives:

- Increase policy makers' understanding of AI and shape AI policy discourse in Indonesia,
- Latest updates on AI innovation
- +150 policymakers across 30 government institutions

Topics

- **H1:**
 - AI and Cybersecurity;
 - AI and Education;
 - AI Opportunity White Paper
- **H2:**
 - AI and Copyright;
 - AI and Disaster preparedness; and
 - Global AI regulatory approaches

Promote inclusive adoption and accessibility

At the national level

Conduct national AI opportunity assessments for public services

Esp. in sectors that immediately impact citizens like health, education and transportation

Adopt cloud-first standards to promote AI uptake and transparent procurement rules that encourage fair competition

Give traditional industries and MSMEs an “AI jumpstart”

At the regional level

Support education in non-traditional sectors

Open data sets in local language

Helping workers in Asia-Pacific benefit from AI's potential



May 2024: Google.org launched the \$15M AI Opportunity Fund: Asia-Pacific, led by Asian Venture Philanthropy Network (AVPN) and supported by Asian Development Bank to help workers in the Asia-Pacific region, including in Southeast Asia, build AI knowledge and skills to increase their chances of success in an economy that relies on artificial intelligence.

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