

AI GOVERNANCE IN SOUTHEAST ASIA

Version 2.0



ABOUT THE COUNCIL

Since 1984, the US-ASEAN Business Council has been the premier advocacy organization for US corporations operating within the dynamic Association of Southeast Asian Nations (ASEAN). Worldwide, the Council's membership of more than 190 companies generates almost US\$7 trillion in revenue and employs nearly 15 million people. Today our members include the largest US companies conducting business in ASEAN, and range from newcomers to the region to companies that have been working in Southeast Asia for more than 100 years. The Council has eight offices around the globe, in Washington, DC; New York, NY; Bangkok, Thailand; Hanoi, Vietnam; Jakarta, Indonesia; Kuala Lumpur, Malaysia; Manila, Philippines; and Singapore.

To achieve its objectives, the Council conducts research and analysis of economic, environmental, financial, political, and social, conditions in the ten countries of the Association of Southeast Asian Nations (ASEAN) namely Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, the Philippines, Singapore, Thailand, Timor-Leste, and Vietnam. The Council utilizes the results of its research and analysis to provide educational programs, technical information for product innovation, and trade and investment-related activities.



TABLE OF CONTENTS

Foreword	01
Brunei Darussalam	03
Cambodia	05
Indonesia	08
Lao PDR	12
Malaysia	14
Myanmar	19
The Philippines	21
Singapore	27
Thailand	35
Timor-Leste	39
Vietnam	40
Appendix: AI Use Cases	45

FOREWORD

Southeast Asia stands ready to be one of the biggest beneficiaries of greater artificial intelligence (AI) adoption and integration. With an expected 18% GDP uplift by 2030, AI adoption has the potential to [double](#) the region's digital economy projections to US\$2 trillion. Most ASEAN Member States now have national AI strategies in place or are on track to finalizing their current drafts, aiming to leverage AI in strategic sectors such as health, agriculture, and education.

Building upon existing national AI strategies, additional policy guidance is beginning to emerge as well as increased engagement in multilateral forums, including the ASEAN Working Group on AI Governance (WG-AI) and the UNESCO AI Readiness Assessment Methodology (RAM) processes. There is a clear desire to chart an “ASEAN way” for AI governance that balances responsibility and innovation, underscored by the voluntary, risk-based approach outlined under the [ASEAN Guide on AI Governance and Ethics](#), [Expanded ASEAN Guide on AI Governance and Ethics - Generative AI](#), and [ASEAN Responsible AI Roadmap](#), as well as the [upcoming establishment](#) of an ASEAN AI Safety Network (ASEAN AI SAFE).

However, gaps in institutional readiness, digital economy maturity, and talent constraints present challenges for the region's AI outlook. Despite the endorsement of key ASEAN AI policy frameworks, some ASEAN Member States have begun to introduce prescriptive regulatory measures through national draft laws and decrees, presenting the potential for a fragmented policy landscape. The adoption of transparent, risk-based governance frameworks aligned with internationally accepted best practices and standards will be essential to promote regional competitiveness and strengthen investor confidence.

As ASEAN Member States seek to establish themselves as regional AI hubs in a competitive landscape, it is important to ensure the right policies and frameworks are in place to support a robust AI ecosystem. Governments are actively exploring ways to modernize public sector infrastructure, improve the usability and accessibility of public data, and encourage training and SME initiatives to support an AI-enabled workforce. The Council's 2025 AI policy brief, [Responsible AI Playbook for Resilient Economic Growth](#), outlines foundational enablers and key recommendations to support ASEAN's AI ambitions, highlighting the importance of interoperability and harmonization, data governance best practices (e.g., open public sector data), critical infrastructure (e.g., 5G, cloud-first policies), AI safety (e.g., risk assessments, security standards), and broader AI ecosystem support (e.g., R&D incentives, clear IP regimes). Together, these recommendations and priorities reflect a wider shift toward practical, enabling policies with that support innovation and public trust in AI.

This report provides a snapshot of the current AI policy landscape in the region as of November 2025, building upon insights from the first edition released in October 2023 as well as the Council's recent AI capacity-building engagements. The report is organized by country to enable members to have better insight into shifts in AI policy, government initiatives, and related trends across the region.



Mario Masaya

Vice President of Research, Technology and Financial Services
US-ASEAN Business Council



BRUNEI DARUSSALAM

Brunei Darussalam released its national AI guide in 2025. In May 2025, Brunei's Minister of Finance and Economy II Dato Seri Setia Dr Awang Haji Mohd Amin Liew bin Abdullah [announced](#) Brunei's plans to develop a national AI strategy, integrating AI across various sectors, while addressing regulatory gaps, data privacy safeguards, and the inclusive adoption of such technologies.

The importance of AI and emerging technology is recognized in Brunei's digital economy policy frameworks, including the [Digital Paradigm Framework \(2020-2025\)](#) and [Digital Economy Masterplan 2025](#). To realize its vision of becoming a Smart Nation, the country has made efforts to encourage greater adoption of Industrial Revolution 4.0 technologies and develop a digital-ready workforce.

NATIONAL AI GUIDE

In May 2025, Authority of Information and Communications Technology Industry (AITI) released the [Guide on AI Governance and Ethics for Brunei Darussalam](#) (Guide) in collaboration with the national AI Governance and Ethics Working Group. The Guide outlines principles and ethical practices in line with the principles of Melayu Islam Beraja (MIB) and Maqasid of Shariah. Key principles include transparency and explainability, data protection and governance, security and safety, robustness and reliability, fairness and equity, human centricity, and accountability and integrity. The Guide takes notable influence from the [ASEAN Guide on AI Governance and Ethics](#), including in its categorization of AI stakeholders and voluntary, risk-based approach, and may be periodically updated to stay relevant with trends in AI development and adoption.

ORGANIZATIONAL STRUCTURE

AITI has played leading role in the country's AI governance, establishing the national AI Governance and Ethics Working Group tasked with developing Brunei's national AI guide. The working group includes representatives from 24 organizations, including the Ministry of Transportation and Infocommunications (MTIC), Ministry of Health (MOH), Ministry of Finance and Economy (MOFE), Ministry of Education (MOE), E-Government National Center (EGNC), Cyber Security Brunei (CSB), Brunei Darussalam Central Bank (BDCB), local universities, and private sector stakeholders.

TALENT DEVELOPMENT

In line with the Digital Economy Masterplan's objective of fostering a digital and future-ready society, the [AITI Strategic Plan \(2020-2025\)](#), [Brunei ICT Industry Competency Framework \(BIICF\)](#), and [MOE Digital Transformation Plan \(2023-2027\)](#) incorporate digital transformation through education and skills-building in their agendas, including the adaption of AI skills. The Government has also spearheaded initiatives, such as [Digital Upskilling Program](#) and efforts to [provide](#) training to teachers, have been implemented to support AI adoption and skills development. The School of Digital Science (SDS) at Universiti Brunei Darussalam (UBD) has [introduced](#) a degree in AI and has worked with the government to [upgrade](#) the [CareerBN](#) platform to integrate AI technologies, bridging skills identification and job matching gaps.

AI ADOPTION

The health sector was an early priority area for AI adoption, with the government introducing AI-enabled [online COVID-monitoring resources](#) and BruHealth mobile app [functionalities](#). Other recent priority sectors have included government applications and [natural resource management](#). The Prime Minister's Office (PMO) and the Public Service Department have [launched](#) new AI initiatives to enhance civil service recruitment and policymaking processes. Brunei Darussalam has been [selected](#) one of two pilot countries to implement the Commonwealth's StrategusAI toolkit, offering an opportunity strengthen policymaking, regulations, and strategy development through the toolkit's real-time analysis and scenario modelling to help governments craft data-driven policies.



CAMBODIA

Cambodia is in the process of [finalizing](#) its draft national AI strategy. In May 2023, the Ministry of Industry, Science, Technology and Innovation (MISTI) released [Artificial Intelligence Landscape in Cambodia: Current Status and Future Trends](#), detailing the local AI landscape and outlook and providing suggestions on how Cambodia can encourage the development of responsible AI. AI adoption has also been highlighted as a key digital enabler under the [Cambodia Digital Economy and Society Policy Framework \(2021-2035\)](#), and [Cambodia Digital Government Policy \(2022-2035\)](#), as well as some sectoral policies, such as the [Cambodia Financial Technology Development Policy \(2023-2028\)](#).

AI adoption remains largely [concentrated](#) in Cambodia's primary sectors. As Cambodia seeks to achieve upper middle-income status by 2030 and a high-income country by 2050, it will be increasingly important for Cambodia to tap into the benefits of emerging technology to enhance productivity and achieve greater economies of scale. However, Cambodia currently faces significant barriers to greater AI development and deployment, including a talent shortage and financial constraints. In June 2025, Cambodia [launched](#) its [UNESCO AI Readiness Assessment \(RAM\) Report](#) with support from the UN Economic and Social Commission for Asia Pacific (UNESCAP) and the EU.

DRAFT NATIONAL AI STRATEGY

The Ministry of Post and Telecommunications (MPTC) is leading the [drafting](#) of Cambodia's [National AI Strategy \(NAIS\) 2025-2030](#), outlining the country's six key strategic priorities anchored by guiding principles and 41 strategic measures. Key priority areas include human resource development, data governance, digital government and public sector innovation, and adoption sectors such as agriculture, health, and education.



The National Council of Science, Technology and Innovation (NCSTI) worked with the United Nations Economic and Social Commission for Asia and the Pacific (UNESCAP) to [convene](#) technical experts, government officials, and private sector representatives to provide inputs in drafting the NAIS under the Community of Practice on AI Initiative (COPAI). Through collaborative research and shared learning programs, COPAI aims to [align](#) the NAIS with Cambodia's existing frameworks including the [National STI Roadmap 2030](#), [Digital Economy and Society Policy Framework for 2021-2035](#), and [National Research Agenda](#).

ORGANIZATIONAL STRUCTURE

Under the [Cambodia Digital Economy and Society Policy Framework \(2021-2035\)](#), the Digital Government Committee (DGC) is directed to work on short- to long-term measures to increase AI utilization in data-driven governance systems and infrastructure investment in coordination with the Ministry of Post and Telecommunications (MPTC), Ministry of Economy and Finance, and other relevant institutions. According to the Draft NAIS, an Inter-Ministerial Working Group on AI will be established under DGC to support the overall implementation of the strategy, and MPTC would lead implementation of several of the strategic priorities.

In April 2025, the Ministry of Civil Service (MCS) [held](#) a meeting to discuss the allocation of AI functions across government institutions, following a new circular [mandating](#) ministries to clearly define their core and supporting function under the executive branch. The meeting was chaired by MCS Secretary of State Youk Bunna and attended by representatives from MCS, MISTI, MPTC, the Office of the Council of Ministers, and other ministries to gather input from relevant ministries. MCS will be responsible for compiling the feedback into a report for leadership to review.

TALENT DEVELOPMENT

Only 30% of Cambodians are [estimated](#) to possess basic media and digital literacy knowledge, which has been a major barrier to greater AI adoption and broader digital transformation. During the 2021-2022 academic year, only 10% of students in higher education [pursued](#) areas of study focused on digital skills, highlighting limited interest or resources for digital-related training. CADT aims to [increase](#) the share of students taking digital technology courses to 20% to help address the digital talent gap.

Under the Digital Education Strategy for Schools (DESS), MoEYS is [adopting](#) a more proactive approach to AI integration into Cambodia's education system, including secondary and higher education. The Government also [provides](#) PhD scholarships to 5 to 10 experts to study at French universities per year to strengthen its AI talent pipeline. Looking ahead, MoEYS [plans](#) to establish an AI research center to further support AI adoption by educators and students.



In 2024, MPTC launched the [Roadmap for Digital Skills Development in Cambodia \(2024-2035\)](#), to bridge the country's digital skills gap, including fostering AI talent. The MPTC has since launched initiatives to strengthen the local digital workforce, including a new [professional development association](#) and [community platform](#), to encourage knowledge-sharing and training; provide scholarship opportunities; and support internship and job placement.

RECENT DEVELOPMENTS

AI Forum Cambodia is working with the Southeast Asian Languages in One Network project, led by AI Singapore, to [develop](#) an open-source Khmer Large Language Model (LLM) to support equitable access to AI in Cambodia. A demo of the Khmer LLM is [expected](#) to occur by the end of 2025.

In addition to finalizing the National AI Strategy (NAIS) 2025-2030, Cambodia is [expected](#) to develop a National AI Governance Framework and MPTC AI Promotion Strategy to help drive AI adoption in key sectors. The Framework is targeted to be submitted to the National Digital Economy and Society Council for final review by the end of this year but public details on the current draft are limited.



INDONESIA

Indonesia has had a national AI strategy in place since 2020 and is in the process of finalizing its National AI Roadmap. In 2025, one of the Ministry of Communication and Digital Affairs' (KOMDIGI) core priorities has been to [translate](#) both the National AI Roadmap and the AI Ethics Guidelines Concept into two Presidential regulations – one on the National AI Strategy and one on AI Ethics. Among ASEAN Member States, Indonesia is expected to be one of the largest beneficiary from greater AI adoption, [reportedly](#) serving as the third-largest source of traffic to AI services globally in 2024. However, Indonesia is projected to face a 9 million shortage in skilled tech workers by 2030, posing challenges to country's ability to fully integrate AI across different sectors.

Indonesia has become increasingly involved in global and regional AI discussions. At the ASEAN-level, Indonesia has spearheaded the Public-Private Dialogue on AI initiative in 2025 to support regional efforts to strengthen multistakeholder partnerships and greater AI adoption. Indonesia has also [indicated](#) interest in hosting UNESCO's AI Global South Forum in 2026 after becoming the first Southeast Asian country to complete UNESCO's [AI Readiness Assessment Methodology \(RAM\) exercise](#).

NATIONAL AI STRATEGY

In August 2020, Indonesia [released](#) the National Strategy for AI (2020-2045) to harness the potential of AI to drive domestic economic growth and technological development and support efforts to [achieve](#) Indonesia's broader development strategy, Vision of Indonesia 2045. Stranas KA outlined five national priorities where AI is expected to have the largest impact: health services, bureaucratic reform, education and research, food security, and mobility and smart cities. While Stranas KA served as an initial strategic reference point during Indonesia's early AI policy development phase, government consultations and current policy work have now [become](#) increasingly anchored around KOMDIGI's National AI Roadmap and Draft AI Ethics Guidelines, which – once formalized through Presidential Regulation – are anticipated to take precedence over earlier strategic documents.



Complementing these national efforts, sectoral authorities have begun researching and issuing AI guidance. In January 2025, the Indonesian Press Council issued [Regulation No. 1/2025 on Guidelines for the Use of AI in Journalistic Works](#), which mandates human oversight of AI-assisted journalism, requires verification of AI-generated content, and sets transparency obligations for disclosing AI tools used. In April 2025, the Financial Services Authority (OJK) launched [AI Governance for Indonesian Banks](#), a governance framework to guide responsible AI development and implementation in banking, setting a minimum benchmark and emphasizing risk management and prudence while allowing adaptation through future regulations, standards, and guidelines. In October 2025, KOMDIGI [announced](#) that all ministries and government agencies will be required to develop sector-specific AI regulations, which will be based on the overarching national AI usage guidelines that KOMDIGI plans to issue in 2026.

ORGANIZATIONAL STRUCTURE

The development of Stranas KA was initially [coordinated](#) by the Agency for the Assessment and Application of Technology (BPPT), which facilitated discussions amongst a working group comprised of various public and private stakeholders prior to the national strategy's release. Stranas KA primarily served as an early strategic foundation document during Indonesia's initial AI policy development phase. Over time, Indonesia's institutional landscape for AI governance has evolved, with KOMDIGI now serving as the primary authority guiding national AI governance direction and actively engaging industry, academia, and multilateral partners. Within KOMDIGI, the Directorate General of Digital Ecosystem [houses](#) the Director of AI and Emerging Technology, which is the core unit shaping regulatory approaches, national AI coordination, and policy engagement. KOMDIGI has also [played](#) a leading role in representing Indonesia in global forums such as the AI Safety Summit in 2023 and 2024.

Under Stranas KA, the AI Innovation Center (PIKA) was created, with one of its main deliverables to be the creation of an orchestrating organization to help oversee the implementation of Stranas KA. In August 2021, the AI Industry Research and Innovation Collaboration (KORIKA) was established to support AI innovation and encourage AI adoption across various sectors through facilitating a quadruple helix AI ecosystem between government, industry, academia, and communities. In late 2023, PIKA officially operationalized the National AI Coordination Office as an institutional mechanism to enhance ongoing national AI coordination and strengthen cross-ministerial alignment.

The Ministry of Health has also [established](#) Pojka AI to serve as its AI working group, dedicated to developing guidance, policy instruments, and safeguards to ensure responsible AI adoption and secure health data processing.



TALENT DEVELOPMENT

Given Indonesia's AI talent gap, the government has launched several initiatives to encourage the development of AI talent and digital skills development more broadly. Under the Digital Indonesia Road Map (2021-2024), KOMDIGI has [launched](#) several programs to close Indonesia's digital talent gap, including the Digital Talent Scholarship (DTS) and has [forged](#) partnerships with international partners on talent development in the technology sector. Over 950 universities [offer](#) courses related to AI and machine learning, with at least six universities having AI-specific programs.

Since 2024, the DTS program has [expanded](#) with new tracks in generative AI, data governance, and AI ethics, with a goal of training 100,000 participants by 2025. The Indonesia AI Research Consortium (IARC) also [launched](#) an AI Labs Network to connect research nodes across Java, Sulawesi, and Kalimantan. In the Draft National AI Roadmap, KOMDIGI [formalizes](#) the categorization of national AI talent development into three groups – AI Developer Talent, AI User Talent, and AI-Impacted Talent – to enable more targeted and proportional capacity-building efforts. This aligns with KOMDIGI's ongoing work this year to [prepare](#) two Presidential Regulations on National AI strategy and AI Ethics, where development readiness is anticipated to form a core strategic pillar.

Additionally, KOMDIGI – in collaboration with local think tank ThinkPolicy.id – co-developed the report [Co-Creating Indonesia's AI Future Through Meaningful Policy Dialogues](#). This report helped map ecosystem needs, identify talent challenges, and inform future policy design prior to the drafting of the National AI Roadmap and Presidential Regulation process.

OTHER GOVERNMENT INITIATIVES

Government adoption of AI and other emerging technology has been encouraged under [Presidential Regulation No. 95/2018 on E-Government](#). The government has sought to integrate AI systems into several public services and tools, including [public service portals](#), [food data processing](#), and [natural resource monitoring](#). Under the Blueprint for Digital Health Transformation Strategy 2024, Indonesia also [aims](#) to implement an AI-based health analysis system from 2023 to 2024 at the central and local levels as it seeks to establish more integrated health data and services. Phase I of the AI-based health analysis system was completed in 2024 in 15 provinces, with Phase II underway to further integrate AI into the national health information exchange.

AI has also become a key component of Indonesia's smart city developments, including the Jakarta Smart City (JSC) initiative. Under the JKC initiative several AI projects have been [rolled out](#), including traffic and rainfall prediction, transportation safety and vehicle tax revenue estimation



citizen feedback categorization, chatbots, and COVID-19 crowd detection. Since 2024, smart city AI pilots have expanded to other cities such as Surabaya, with new applications in flood prediction, urban mobility, and smart waste management.

RECENT DEVELOPMENTS

In August 2025, KOMDIGI [launched](#) a public consultation on the accompanying White Paper on the National AI Roadmap to address the socio-economic impact of AI and increase Indonesia's global AI competitiveness by outlining programs, institutional responsibilities, and timelines for implementation. The public consultation also introduced Indonesia's Draft AI Ethics Guidelines, which aims to establish principles for accountability, transparency, and alignment with the Personal Data Protection Law (Law No. 27/2022), while also addressing risks such as disinformation and deepfakes.

The public consultation is part of the forthcoming Draft Presidential Regulation on Artificial Intelligence (AI) and the Draft Presidential Regulation on AI Ethics Guidelines which had been targeted for finalization by Q1 2026, postponed from 2025 due to the ongoing internal deliberation with other ministries and agencies.

The Roadmap is expected to provide guidance on measures to mitigate AI risk, strengthen innovation, increase inclusion, and enhance AI innovation. Key priority sectors for AI development include health, education, bureaucratic reform, smart city development, and food security. Over 400 representatives from government, industry, academia, civil society, and media were involved in the development process as part of the National AI Roadmap Task Force. Meanwhile, the Draft Guidelines aim to strengthen the ethical framework introduced by the Ministerial Circular Letter No. 9/2023 on AI Ethics.



LAO PDR

Lao PDR's national artificial intelligence (AI) strategy is currently under development. AI adoption in Lao PDR is limited, with only 1% of the workforce [employed](#) in the ICT sector. The importance of AI adoption is recognized in some policy documents, including the [Draft Decree on Digital Transformation](#) released in 2025. However, persistent challenges related to internet affordability, digital skills, and ICT education ecosystem have [presented](#) barriers to greater adoption. Internet expansion has [improved](#) in recent years, rising to over 66.2% in 2025, but connectivity [remains](#) uneven, particularly in rural areas.

Under the [National Digital Economy Development Vision 2040 \(2021-2040\)](#), Lao PDR seeks to expand its digital economy from 3% to 10% of GDP by 2040. The Digital Economy Strategy (2021-2030) and the National Digital Economy Development Plan (2021-2025) [outline](#) the need for Lao PDR to develop digital infrastructure and policies, expand high-speed internet access, promote digital technology skills, and increase public awareness of digital technologies

DRAFT NATIONAL AI STRATEGY

Lao PDR's draft National AI Strategy to 2035 is expected to provide greater direction for research and development, capacity building, and responsible deployment. Public information on the draft is limited, but the strategy is expected to outline core AI principles and identify priority sectors for AI adoption. The strategy is being [shaped](#) in parallel with the country's UNESCO AI Ethics Readiness Assessment Methodology (RAM), which has identified governance and coordination weaknesses and put forth recommendations to strengthen human capital investment, coordination, and multi-sectoral governance, including the establishment of a National AI Council.



ORGANIZATIONAL STRUCTURE

The Ministry of Technology and Communications (MTC) is [leading](#) the drafting of the national AI strategy and initiatives to introduce AI across government functions and industry activities. Key sectors for greater AI adoption include labor, education, and media. Broader digital governance is [coordinated](#) through the National Digital Transformation Committee, which is chaired by the Prime Minister, with the Deputy Prime Minister and Minister of Public Security, the Deputy Prime Minister and Minister of Foreign Affairs, and the Minister of Technology and Communications serving as Vice Chairman.

TALENT DEVELOPMENT

Gaps in formal education initiatives, such as university AI initiatives and [primary school STEM education](#), have [caused](#) challenges in establishing an AI talent pipeline. National research spending [remains](#) less than 1% of GDP, leaving limited resources for technological innovation.

Partnerships with [Chinese](#) and [Korean institutions](#) as well as multilateral partners offer opportunities to foster greater talent development and research opportunities. UNESCO and UN agencies have [launched](#) AI capacity-building programs, including AI training for Technical and Vocational Education and Training (TVET) instructors as well as a Lao-language AI primer and AI literacy initiatives for schools, civil servants, journalists, and rural youth.

OTHER GOVERNMENT INITIATIVES

While AI adoption in Lao PDR remains limited, the government has taken steps to explore how AI can be integrated into government operations. In 2025, the National Assembly took part in discussions with the Parliamentary Assembly of the Francophonie to [explore](#) how AI can be integrated into parliamentary operations, including policy work and efforts to combat misinformation. The Government has also partnered with China's Guangxi Zhuang Autonomous Region to [establish](#) the China-Laos AI Innovation Cooperation Center in Vientiane, promoting joint research, knowledge exchange, and sectoral AI applications.

In June 2025, the Government also [signed](#) a Memorandum of Understanding (MOU) to conduct a feasibility study on green-powered AI infrastructure and developing a dedicated AI Special Economic Zone (SEZ) as well as establish an AI Innovation Center. The AI SEZ is expected to span over 15 hectares near Vientiane.



MALAYSIA

Malaysia is in the process of updating its national AI strategy and advancing several national and regional AI policy priorities. AI adoption is expected to [unlock](#) up to US\$113.4 billion in economic value for Malaysia, highlighting its role as a central driver of national growth. Under the [National 4th Industrial Revolution \(4IR\) Policy](#), AI was identified as one of five foundational 4IR technologies. In addition to the National 4IR Policy, the [National AI Roadmap 2021-2025](#) (AI-Rmap) aligns with the aims of the [National Policy on Science, Technology and Innovation \(DSTIN\) \(2021-2030\)](#), [10-10 Malaysia Science, Technology, Innovation, and Economy \(10-10 MySTIE\) Framework](#), [Malaysia Digital Economy Blueprint](#), and other national policies and programs that support AI development and implementation.

In December 2024, the government [launched](#) the National AI Office (NAIO), incubated under the MyDIGITAL Corporation, to strengthen coordination and drive AI-Rmap's priorities, providing interim leadership. NAIO has since [identified](#) 55 concrete AI use cases across sectors to accelerate adoption, ranging from traffic prediction in transportation and radiology applications in healthcare to smart agriculture platforms for food security and workforce reskilling collaborations through TalentCorp. Recent public-private initiatives are also helping to address these gaps as Malaysia works to align its approach with regional frameworks like the ASEAN Guide on AI Governance and Ethics.

During its ASEAN Chairmanship year in 2025, Malaysia has sought to position itself as a regional thought leader on AI safety, [spearheading](#) the ASEAN AI Safety Network (ASEAN AI SAFE) initiative. ASEAN AI SAFE aims to provide a platform to coordinate standards, risk management, and responsible AI adoption across Southeast Asia. The declaration for establishment is expected to be formally adopted at the 47th ASEAN Summit, with establishment targeted to take place by early 2026. This agenda was reinforced at the ASEAN AI Malaysia Summit in August, which gathered participants from government, industry, academia, and civil society to shape a shared regional agenda for inclusive and trustworthy AI. During the Summit, Prime Minister Anwar Ibrahim [underscored](#) a vision for an AI model that is inclusive, equitable, and culturally grounded.



NATIONAL AI ROADMAP

In 2021, Ministry of Science, Technology, and Innovation (MOSTI) issued the AI-Rmap, a living document which seeks to guide Malaysia's AI development and adoption and support Malaysia's goal of becoming a high-tech nation by 2030. The AI-Rmap outlines seven key principles to guide responsible AI use and innovation, including fairness, transparency, accountability, and privacy and security. Six strategies are detailed to support Malaysia's AI innovation system related to AI governance, research and development, digital infrastructure, talent development, acculturation and multistakeholder collaboration.

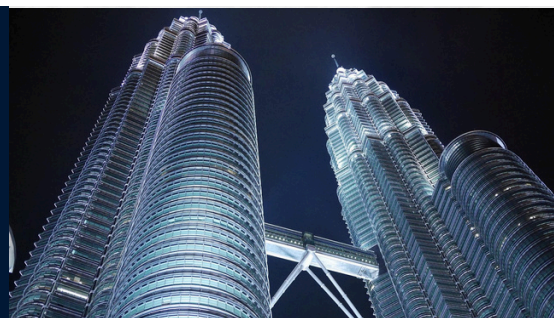
The roadmap was refined in 2024 to provide clearer national AI use cases and updated strategic initiatives. Five priority sectors have been identified for greater AI adoption, namely agriculture and forestry, medical and healthcare, smart cities and transportation, education, and public service. To embed responsible practices across these sectors, MOSTI released Malaysia's [National Guidelines on AI Governance and Ethics](#) in 2024 under Strategic Initiative 1.4, setting out principles for inclusive and trustworthy AI development within a local context.

The government is currently reviewing outcomes from the AI-Rmap to transition to the next phase of ecosystem growth. To strengthen this transition, NAIIO has been [tasked](#) with aligning its key deliverables, such as the upcoming AI Technology Action Plan 2026-2030, with the goals set out in the AI-Rmap to ensure continuity and stronger coordination across Malaysia's evolving AI ecosystem.

ORGANIZATIONAL STRUCTURE

The AI-Rmap was developed by experts from Universiti Teknologi Malaysia, with support from the National Tech Association of Malaysia and MOSTI's National Science and Research Council. The AI-Rmap identified key agencies and collaborators to advance Malaysia's AI agenda, including MOSTI, MDEC, the Ministry of Investment, Trade and Industry (MITI), the Malaysian Communications and Multimedia Commission (MCMC), the Ministry of Higher Education (MOHE), and the Ministry of Human Resources (MOHR).

Under the AI-Rmap, the establishment of an AI Coordination and implementation Unit (AI-CIU) was listed as a key deliverable to strengthen coordination. In December 2024, the AI-CIU formally [transitioned](#) into NAIIO, marking a significant step toward centralized AI governance. NAIIO is currently [operating](#) under a 12-month incubation phase within the MyDIGITAL Corporation to establish foundational frameworks and partnerships. NAIIO's initiatives are supported by specialized working groups, bringing together stakeholders from government, industry, academia, and civil society. The specialized Working Groups (WGs) were [established](#) in February 2025, with a focus on critical domains such as AI sovereignty, regulation and policy, governance



and ethics, safety, security, talent development, and advisory functions in emerging AI issues.

To strengthen standards alignment, the Malaysian Standards Department (JSM) has been [set up](#) a National Mirror Committee, chaired by MIMOS, to develop national AI standards aligned with ISO/IEC frameworks. In 2025, a Digital Asset and AI Advisory Council, chaired by the Prime Minister, was also [established](#) to convene local and international experts, industry players, academics and policy thinkers. The Council serves to provide strategic advice to strengthen Malaysia's position in the global digital economy, particular on AI, big data analytics, cloud computing, stablecoins, and cryptocurrencies.

TALENT DEVELOPMENT

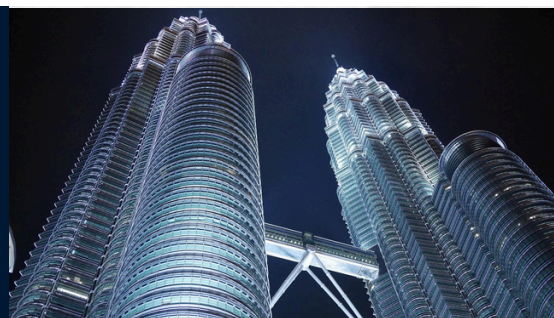
AI talents in Malaysia have traditionally been sourced by upskilling employees, industry-university partnerships, and advertising. The AI-Rmap seeks to develop AI talents through comprehensive and inclusive AI education, reskilling and upskilling employees, and attracting overseas talent. In addition to strategic initiatives outlined in the AI-Rmap, Malaysia has launched various tools and initiatives to encourage AI talent development, including the [MyIndustry AI Scholarship Program](#) and the [Digital Skills Training Directory](#) by MDEC.

To increase public literacy, Malaysia launched several initiatives with industry, including free online modules under [AI Untuk Rakyat](#) and the [rollout](#) of industry certificate scholarships. The AI Talent Roadmap 2024-2030 further outlines Malaysia's commitment to early-stage education supported by programs like [Cikgu Juara Digital](#), which has trained hundreds of teachers and reached thousands of students in AI and data science. To strengthen alignment with industry needs, TalentCorp, MyDIGITAL, and the National AI Office set up the [MyMahir National AI Council for Industry](#) in 2025 to coordinate workforce strategies and partnerships.

OTHER GOVERNMENT INITIATIVES

The government has also launched tools and programs aimed at making AI more accessible to encourage greater industry adoption. In 2021, MDEC [launched](#) the Data, Analytics and AI Readiness Assessment Tool with the support of the International Data Corporation (IDC) to enable enterprises and organizations to become Industrial Revolution 4.0-ready by better understanding their data, analytics, and AI readiness and identifying strengths and areas for improvement. This tool has since evolved into the broader Data-Driven Enterprise Program, which continues to help companies expand markets, enhance customer service, and monetize data.

In 2021, the Malaysian Investment Development Authority (MIDA) launched the [AI for SMEs \(AI4S\) Program](#) in collaboration with Intel Malaysia and Malaysia Productivity Corporation (MPC) to



enable SMEs to implement AI pilot projects using Intel's AI Starter Kit. To date, the program has supported more than 100 SMEs and produced dozens of case studies demonstrating productivity gains and quality improvements.

Government organizations at the national and state level have also begun to adopt AI for several use cases, including [traffic management](#), [an integrated immigration system](#), and [pilot sentencing tools for judicial use](#). In February 2025, the Ministry of Digital, through its National Digital Department (JDN) and in collaboration with MDEC, launched the [Public Sector AI Adoption Guidelines](#) to guide ministries and agencies in responsible AI use. The guidelines set out practical tools for adoption, including an overview of AI, ethical principles such as fairness, accountability, and transparency, explaining roles and responsibilities for implementation. The guidelines also introduce risk management measures, adoption procedures and self-assessment templates.

RECENT DEVELOPMENTS

NAIO is expected to deliver seven priority actions areas, namely developing the National AI Action Plan (2026-2030), establishing an AI Adoption Regulatory Framework, accelerating AI technology adaptation, releasing a national AI Code of Ethics, conducting an AI Impact Study for Government, publishing a National AI Trend Report, and developing AI-related datasets.

In July 2025, NAIO launched a national public consultation to gather input on the National AI Action Plan, focusing on issues such as job impact, privacy, education, and sustainability. The document is expected to focus on three core guiding principles, namely accountability and transparency, privacy and security by design, and human oversight, while considering ongoing and existing legal dimensions, such as the [Personal Data Protection Act 2010 \(Act 709\)](#), and the [Cybersecurity Act \(Act 854\)](#). The final version will be tabled in December 2025.

In June 2025, Digital Minister Gobind Singh announced that the NAIO was preparing a detailed report with proposals for Malaysia's first AI law outlining requirements for responsible AI development, risk management, and transparency. The proposals were expected to be submitted to the Ministry of Digital for Cabinet consideration, marking the country's first concrete move toward dedicated AI legislation. While legislative consultations are anticipated to follow, the government has already indicated that the Bill is expected to be tabled in Parliament in the second half of 2026.

Malaysia's Personal Data Protection Act (PDPA) was also amended in 2024 to address AI-specific issues such as data portability, biometric data protection, and enhanced privacy safeguards to mitigate risks from automated decision-making. In April 2024, MOSTI launched an AI Sandbox Pilot Program in collaboration with NTIS, MRANTI, and NVIDIA to support AI startups and talent development. The programs is aimed at catalyzing up to 900 startups and nurturing over 13,000



new AI talent by 2026.

Sector-specific regulatory efforts have also progressed. The Ministry of Communications [announced](#) that AI Guidelines for Media, Public Relations, and Digital Content Creation will be launched in late 2025 to address responsible use of AI in communications. Meanwhile, Bank Negara Malaysia (BNM) published its discussion paper on [AI in the Malaysian Financial Sector](#) in August 2025, inviting public feedback. The paper outlines BNM's regulatory and developmental approach toward AI adoption in the financial sector, including supervisory expectations, risk governance, and guiding principles for responsible use.



MYANMAR

Myanmar is in the process of drafting its national AI strategy. Frameworks related to the broader digital economy, such as the [Myanmar Digital Economy Roadmap](#), [Universal Service Strategy \(2019-2023\)](#), and [Draft Myanmar E-Governance Master Plan 2030](#), also highlight the importance of AI adoption and enablers for greater adoption such as talent development.

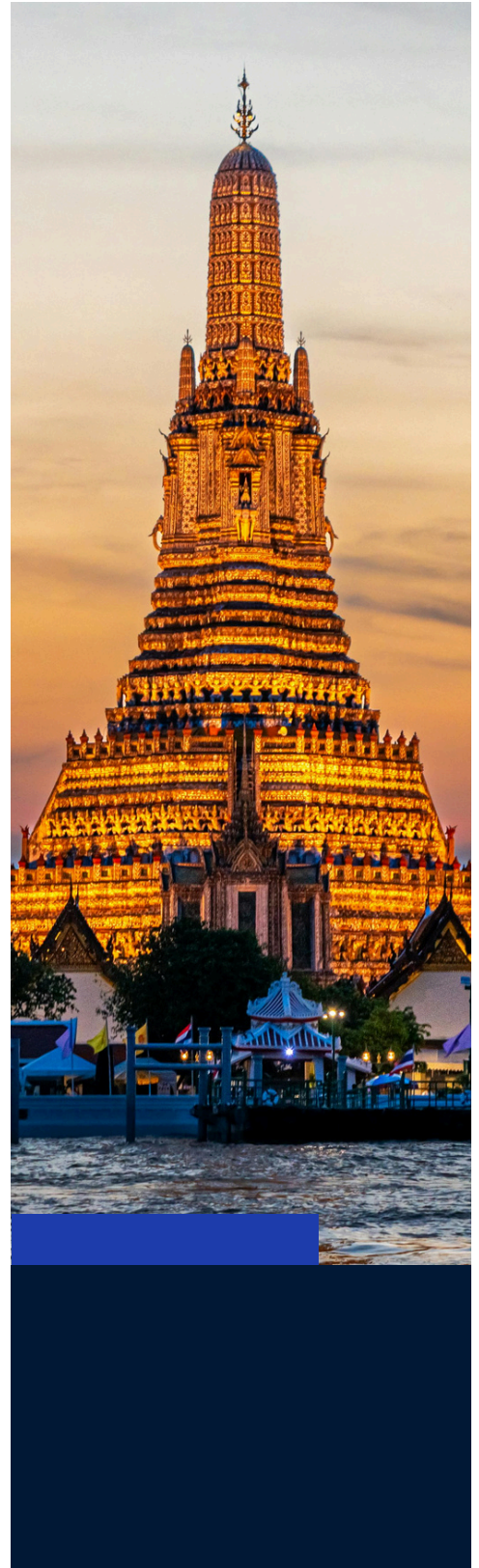
Myanmar's rapid increase in its rate of smartphone penetration presents an opportunity for digital and financial leapfrogging, enabling the country to accelerate its pace of development and change via technology. However, AI adoption is limited due to financial, human capital, and physical capital constraints. Many AI use cases in Myanmar continue to be driven by foreign companies doing business in Myanmar, such as [AI-enabled chatbots](#) and [natural disaster recovery efforts](#).

DRAFT NATIONAL AI STRATEGY

In 2025, the Ministry of Science and Technology (MoST) [announced](#) that it has been drafting Myanmar's National AI Strategy and National AI Policy. It also seeks to deepen international and regional cooperation to support responsible AI adoption and digital transformation. Limited public details about the draft are available.

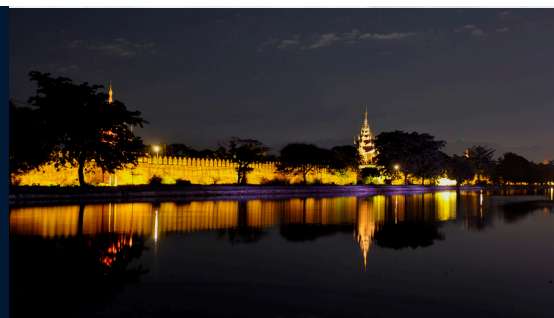
ORGANIZATIONAL STRUCTURE

Under the [Myanmar Digital Economy Roadmap](#), the Ministry of Science and Technology is mandated to be responsible for policy implementation related to AI, with cooperation from the Ministry of Transport and Communications (MoTC). The Roadmap also calls for enhancing AI adoption, with efforts to be overseen by the Innovation & Digital Skills Committee led by MoST, with support from the Ministry of Education (MoE) and private sector partners.



TALENT DEVELOPMENT

Educational opportunities and initiatives related to AI remain limited, with some universities offering diplomas or courses in AI including the [University of Yangon](#). Under the [National Education Strategic Plan for 2016-2021](#), ICT and digitalization are mentioned in relation to improving digital access and facilities, but the plan makes little mention of employer demand for digital skills and competencies that would be necessary for AI-related professions. Additionally, frequent internet disruptions, rising internet prices, and slowing internet connections since February 2021 have placed major barriers on workers' ability to access digital educational resources.



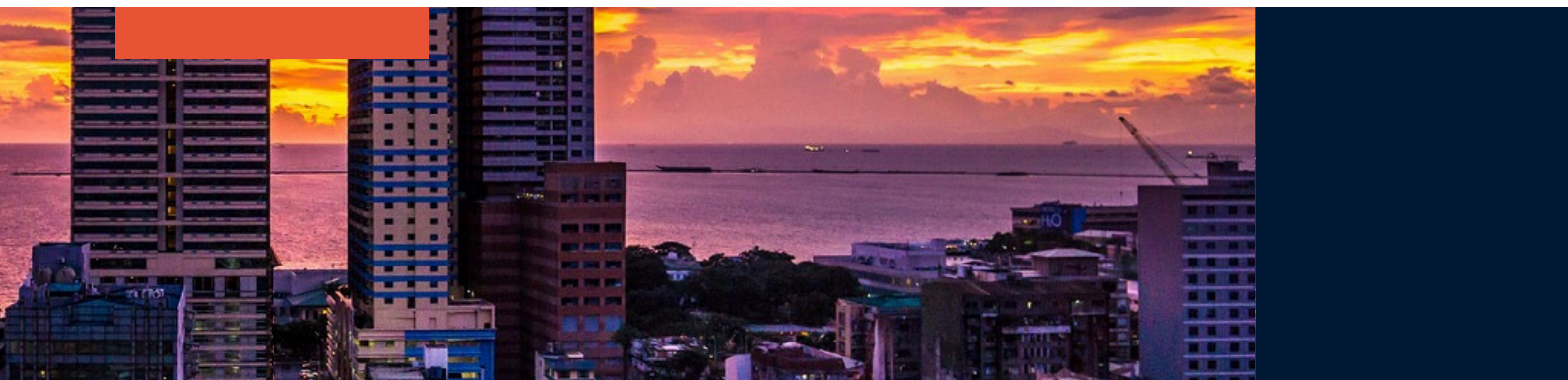
THE PHILIPPINES

In May 2025, President Marcos Jr. [approved](#) National AI Strategy for the Philippines (NAIS Ph) to guide the development, deployment, and governance of AI in the Philippines, through 2028. Prior to this, the Department of Trade and Industry (DTI) [released](#) its National AI Strategy Roadmap 2.0 (NAISR 2.0), updating its 2021 roadmap to incorporate recent developments and recalibrate proposed strategies in alignment with the national agenda outlined in the [Tatak Pinoy Act \(Republic Act 11981\)](#). The Philippines is [expected](#) to earn as much as PHP 2.6 trillion (US\$44.4 billion) in annual gains if businesses successfully adopt AI solutions into their operations.

NATIONAL AI STRATEGY

In 2024, DTI, in partnership with the Asian Development Bank (ADB), [announced](#) the National AI Strategy Roadmap 2.0 (NAISR 2.0), which aimed to support strategic AI adoption to bolster innovation, economic growth, and the local quality of life. Adapting to the evolving digital landscape, NAISR 2.0 will incorporate ethics and governance frameworks, address limited AI adoption via infrastructure and human capital development, harmonize AI regulatory and legal frameworks.

In 2025, DOST [launched](#) the National AI Strategy for the Philippines (NAIS Ph), aimed at driving the development, deployment, and governance of AI implementation across the country through 2028. NAIS Ph [outlines](#) phased strategies across 2024 to 2028, focused on infrastructure, workforce, innovation, ethics and policy, and deployment across various sectors and institutions. The strategy also aims to [build](#) a collaborative AI ecosystem, through initiatives such as the AI Factory and AI Refinery. The former focuses on AI integration via workforce development, infrastructure, governance, policy, and ethics while the latter aims to drive AI innovation by connecting public, private, and the academe to real-world applications.



NAIS Ph is anchored by a Collaborative AI Ecosystem that fosters AI R&D and supports workforce development, infrastructure, and policy to accelerate AI adoption and integration. The strategy is built around five core desired outcomes – sovereignty, security, safety, sustainability, and skills. These outcomes shape how government, private sector, and the academia can co-develop AI capacity, deploy AI systems responsibly, and ensure that AI adoption contributes to long term national competitiveness and social benefits.

AI ETHICS AND GOVERNANCE

The National Privacy Commission [released](#) guidelines for AI systems to [align](#) with the [Data Privacy Act of 2012 \(Republic Act 10173\)](#), emphasizing principles of transparency, fairness, accuracy, and data minimization. Under the [guidelines](#), personal information controllers (PICs) must incorporate disclosure procedures on the usage of personal data, implement governance mechanisms, monitor biases, and provide mechanisms to exercise data subject rights. The guidelines also mandate the creation of an AI ethics board within PICs.

The Commission on Elections (COMELEC) [introduced](#) Resolution No. 11064 or governing guidelines for the use of social media, AI, and internet technologies for digital election campaigns. Under the guidelines, online campaign-related platforms are mandated to register with COMELEC's Education and Information Division. Technology platforms and providers are also [required](#) to enhance content monitoring frameworks, comply with COMELEC takedown requests, and align terms of service with COMELEC's election-related content transparency guidelines. This regulatory trajectory reflects an ongoing shift toward codifying AI related rules into formal national legislation. This direction is also [aligned](#) with the Legislative-Executive Development Advisory Council (LEDAC), which identified legislation on the fair use of social media, AI, and internet technologies in elections as one of the approved priority measures for the 20th Congress.

Institutional guidance instruments are now emerging alongside privacy regulation and electoral governance. The DICT and Civil Service Commission [issued](#) a draft Joint Memorandum Circular in 2024 on the Principles and Guidelines for an Ethical and Trustworthy Use of Artificial Intelligence in government and continue stakeholder consultations. Separately, the Supreme Court [announced](#) in November 2024 that it is drafting an AI Governance Framework for the Judiciary to codify standards for AI-use in court operations, legal research and case management, and has initiated pilot deployments of AI tools in selected courts.

At the regional level, local governments are also advancing AI-related initiatives aimed at strengthening innovation, ecosystem development, and talent pathways. For example, Western Visayas has [sought](#) to drive AI development and innovation through its AI Development Action Plan supported by a Technical Working Group on AI. Similar regional efforts are emerging across



the country as subnational actors begin experimenting with localized AI integration and innovation support models.

ORGANIZATIONAL STRUCTURE

There is currently no dedicated government agency that deals with overseeing, coordinating, and enforcing AI policies and regulations. Proposed House Bills (HBs) call for the [development](#) of a central AI authority, such as a Philippine AI Board (PAIB) (HB 10944) or AI Development Authority (HB 7396).

Under the NAIS Ph national strategy, key government agencies including the Department of Trade and Industry (DTI), Department of Information and Communications Technology (DICT), Department of Science and Technology (DOST), Commission on Higher Education (CHED), Department of Economy, Planning, and Development (DEPDev), and Technical Education and Skills Development Authority (TESDA) are assigned strategic tasks in AI development and implementation.

In March 2025, the National Innovation Council [approved](#) the creation of an AI think tank to assess the current AI ecosystem, capacities, and future trajectories for practical integration of AI technologies to support the country's economic future. The think tank will be led by the DOST and will convene experts across the government, industries, and academia.

This legislative direction is also being reinforced at the national level. In October 2025, LEDAC [approved](#) a new set of priority measures for the 20th Congress that include proposed legislation related to cybersecurity, digital economy reforms, and AI-linked governance such as the fair use of social media and AI technologies in electoral contexts. These priority measures indicate that Congress is now positioning emerging technology rulemaking within broader structural reform efforts, complementing executive-level strategies and helping shape a more coherent enabling environment for AI adoption.

RESEARCH AND INNOVATION

NAISR 2.0 prioritizes innovation, with the goal of increasing the country's research and development (R&D) budget from 0.3% of GDP to the UNESCO-recommended target of at least 1% of GDP. In line with this objective, DTI also launched the Center for AI Research (CAIR), the first AI hub in the country. The center will engage AI experts and leading data scientists in multidisciplinary research to develop AI solutions for priority sectors, including healthcare and agriculture. The research center is currently [supported](#) by a PHP70 million (US\$1.2 million) subsidy and is [expected](#) to be income-generating within the next three years through partnerships with



relevant industries. As of February 2025, the Department of Education (DepEd) likewise [launched](#) its Education Center for AI Research (E-CAIR) or its research center focused on developing AI tools for basic education.

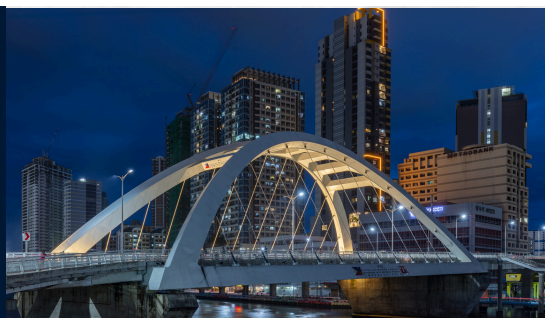
Under the NAIS Ph agenda of fostering collaborative AI ecosystems, the DOST also [plans](#) to develop and [expand](#) AI Hubs, such as i-Hub and Advancing Computing Analytics, Big Data, and AI in the Philippines (ACABAI-PH). These hubs [aim](#) to democratize AI by enabling businesses and innovators to access AI tools without extensive technical expertise or investment. In April 2025, DOST launched the Nexus of AI Research and Applications (NAIRA), which will train 600 individuals in AI literacy and provide collaborative opportunities to co-develop AI tools for real-world applications such as health, education, and agriculture. The DOST will also launch the “AI as a Service” (AlaaS) platform, which will provide AI tools, models and infrastructure. Under the NAIS Ph, the government aims to enhance these AI tools to be integrated into practical use cases and commercialized by 2029.

TALENT DEVELOPMENT

While 61% of the Philippine labor market is [considered](#) to be highly complementary with AI, 14% of the labor market is considered to have low complementarity, indicating notable vulnerability to job displacement. Areas with low AI complementarity include the business process outsourcing (BPO) sector, which [contributed](#) nearly US\$38 billion in 2024. Consequently, IT-& Business Process Association (IBPAP) and independent [coalitions](#) have urged the government to [upskill](#) and [develop](#) labor protection laws for this specific sector amid the risk of AI displacement.

To leverage the potential of AI-complementary labor and address the risks of AI displacement in vulnerable sectors, the Philippine government is proactively integrating AI through its human capital development agenda. DepEd and TESDA partnered with IBPAP to [develop](#) competency-based programs in data analytics, machine learning, and cybersecurity, particularly targeting the BPO labor force. DepEd, DTI, and ADB have also [launched](#) Phase 2 of the SkillsUpNet Philippines (SUN PH) program, supporting digital transformation of priority sectors.

Beyond the BPO sector, DepEd is [incorporating](#) AI usage in the classroom, [crafting](#) regulations to ensure its ethical integration, and is actively [coordinating](#) with TESDA to ensure that the educational curriculum is aligned with the overall industry labor needs. In line with RA 11927 or the Digital Workforce Competitiveness Act, DICT’s Strengthening the Philippine Workforce through Adaptive and Responsive Digital Knowledge (SPARK) program [aims](#) to equip Filipinos with critical digital skills to remain globally competitive. The program offers specialized training for women, persons with disabilities, returning overseas Filipino workers, MSMEs, and communities in geographically isolated and disadvantaged areas (GIDAs). It [covers](#) competencies like digital

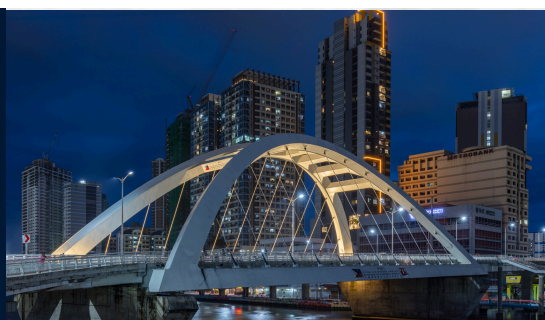


literacy, AI, and cybersecurity, with courses delivered through collaborations with private sector partners to enhance training and certification opportunities.

RECENT DEVELOPMENTS

Beyond ongoing AI initiatives, the Philippine Government is also looking to address priority constraints, including regulatory gaps (e.g., overlapping agency mandates), data challenges (e.g., fragmented data collection and management standards), digital infrastructure and connectivity, human capital and skills gap, energy and environmental sustainability concerns (e.g., energy costs, e-waste), and sector-specific barriers, especially in education, healthcare, and agriculture. To address these challenges, several bills have been [introduced](#) for consideration.

Policy Proposal	Details	Status
HB 7913	AI Development and Regulation Act of the Philippines Proposes the creation of a central AI Authority, develop a national regulatory AI framework, and delineate roles of government agencies	Received by Committee* in May 2023. Pending since January 2024.
HB 7396		Received by Committee in March 2023. Pending since January 2024.
HB 10944	AI Development and Regulation Act of the Philippines Proposes the creation of a central AI Authority and developing a national regulatory AI framework	Received by Committee in September 2024.
HB 9425	Penalizing Deepfake Act Establishes legal clarity for deep-fake related actions and crimes	Received by Committee in October 2023. Pending since November 2023.
HB 10385	AI Regulation Act Establishes an AI bureau within DICT	Received by Committee in May 2024.



Policy Proposal	Details	Status
HB 9448	Protection of Labor Against AI Automation Act Prohibits the hiring and termination primarily due to AI systems	Received by Committee in November 2023. Pending since January 2024.
HB 10460		Received by Committee in May 2024.
HB 10567	Deepfake Accountability and Transparency Act Proposes fines for undisclosed deepfakes	Received by Committee in July 2024.

*House of Representatives, Committee on Information and Communications Technology



SINGAPORE

Singapore has updated its national AI strategy to support its objective of developing a world-class AI ecosystem and strengthening its commitment to advance responsible and inclusive AI development. Singapore continues to serve as a global thought leader in AI governance standards and safety, [engaging](#) in international forums such as the Global Partnership on AI (GPAI) and playing an active role in shaping emerging global norms.

Singapore's coordinated effort to encourage innovation and the responsible use of AI has earned it top places in global AI governance rankings. In the [2024 Oxford Insights' Government AI Readiness Index](#), Singapore ranked first globally in the Government and Data & Infrastructure pillars, signaling Singapore's high degree of relative AI maturity. Singapore has [committed](#) to investing over S\$1 billion (US\$771.9 million) from 2024 to 2029 to support the implementation of Singapore's updated national AI strategy and the country's broader AI compute, talent, and industry development. Some of Singapore's flagship programs include the [National Multimodal LLM](#), [Enterprise Compute Initiative](#), and [AI for Science](#).

At the regional level, the Infocomm Media Development Authority (IMDA) chairs the [ASEAN Working Group on AI Governance](#) (WG-AI), which was established at the 1st ASEAN Digital Senior Officials' Meeting and ASEAN Telecommunications Regulators' Council (ADGSOM-ATRC) Leaders' Retreat in 2024 to guide implementation of ASEAN's AI governance frameworks. WG-AI's mandate was [expanded](#) in 2025 to serve as the main coordinator for all of ASEAN's AI initiatives. IMDA also played a key role in the development of the [ASEAN Guide on AI Governance and Ethics](#) (2024) and [Expanded ASEAN Guide on AI Governance and Ethics – Generative AI](#) (2025), which serve as the guiding documents for WG-AI's activities.

Through the AI Verify Foundation, Singapore is also driving greater alignment by making its AI testing and assurance tools interoperable with internationally recognized standards, including U.S. National Institute of Standards and Technology (NIST) [AI Risk Management Framework](#) (AI RMF),



U.S. NIST [AI RMF – Generative AI Profile](#), [Hiroshima Process Code of Conduct](#), and [ISO/IEC 42001:2023](#). In May 2024, Singapore published the [AI Playbook for Small States](#), offering guidance to similarly resourced countries seeking to adopt responsible AI. On the research front, the country took a leadership role in launching the [Singapore Consensus on Global AI Safety Research Priorities](#) at the International Conference on Learning Representations (ICLR) 2025, reinforcing its commitment to shaping safe and inclusive frontier AI development.

NATIONAL AI STRATEGY

In 2019, Singapore announced its [National AI Strategy](#) (NAIS), which aimed to position the country as a global hub for AI solutions by 2030. The strategy was part of Singapore's broader [Smart Nation initiative](#). In December 2023, the government released the [NAIS 2.0](#), a refreshed strategy that outlines Singapore's vision to harness AI for the public good. It focuses on three key areas: investing in general-purpose AI capabilities, particularly foundation models and compute infrastructure; accelerating deployment of impactful AI use cases across the economy and society; and strengthening talent, governance, and international partnerships.

NAIS 2.0 positions AI as a critical enabler of Singapore's competitiveness, embedding AI across society, the economy and government. In contrast to the first iteration, which focused on specific sectors and pilot projects, NAIS 2.0 adopts a systems-based approach built on three interdependent domains: activity drivers, people and communities, and infrastructure and environment. Ten strategic enablers guide national action across these areas: anchoring AI Centers of Excellence, advancing government use of AI, growing AI talent, raising AI literacy, building attractive AI hubs, investing in computational infrastructure, enabling quality data access, developing trusted and responsible AI, empowering regional and international partnerships, and shaping global AI norms. These enablers are utilized in support of the 15 national actions, including a continued commitment to five key AI projects: intelligent freight planning, seamless municipal services, chronic disease prediction and management, personalized education, and streamlined border clearance.

ORGANIZATIONAL STRUCTURE

The National AI Office (NAIO) under the Smart Nation and Digital Government Office was formed in 2019 to set Singapore's national agenda for AI and catalyze efforts across various stakeholders to work on national AI priorities. As of 2024, NAIO operates under the Ministry of Digital Development and Information (MDDI). NAIO also collaborates with the IMDA and the Personal Data Protection Commission (PDPC), which lead the charge on guidance and regulations related to responsible, trusted AI. The three agencies report to the Minister of Digital Development and Information Josephine Teo, who concurrently serves as Minister-in-charge of the Smart Nation



Initiative and Cybersecurity.

Established in 2018, the [Advisory Council on the Ethical Use of AI and Data](#) is also a key player in guiding AI policy. Members of the Advisory Council [include](#) Alibaba Group, DBS Group, Google, Microsoft, Temasek International, and Singapore University of Technology and Design. The Advisory Council advises the government on issues arising from the commercial deployment of AI that may require policy or regulatory attention, working closely with the IMDA and PDPC.

In May 2024, the Digital Trust Center (DTC) at Nanyang Technological University was [designated](#) to serve as Singapore's AI Safety Institute (AISi) to address gaps in global AI safety science and collaborate with other AISis around the world. Four priority research areas have been identified, namely testing and evaluation; safe model design, development and deployment; content assurance; and governance and policy.

RESPONSIBLE AI AND AI SAFETY INITIATIVES

In 2020, PDPC released the [Model AI Governance Framework \(Second Edition\)](#) to provide policymakers and industry actors with practical tools to address current and potential AI challenges, with the goal of facilitating trust in the use of AI technologies. The Framework is grounded in two principles: 1) AI actors should ensure the decision-making process is explainable, transparent, and fair and 2) AI solutions should be human-centric. The government provided [tools](#) to help AI actors ensure that their products are in alignment to these principles.

In January 2024, Singapore introduced a dedicated [Model AI Governance Framework for Generative AI](#), which elaborates on earlier guidance by outlining nine governance dimensions specific to generative AI. This framework reinforces the importance of ensuring that AI decisions are explainable, transparent, and fair.

In parallel, Singapore [passed](#) the Elections (Integrity of Online Advertising) (Amendment) Act 2024, prohibiting the publication of online election advertising during the election period that contains digitally generated or manipulated, realistic but false depictions of candidate – such as deepfakes or other synthetic media. It also empowers the Returning Officer to order the correction or removal of such content. This legislative step complements existing AI governance frameworks by directly addressing the risks of AI enabled misinformation in democratic processes.

In October 2024, the Cyber Security Agency of Singapore (CSA) released the [Guidelines on Securing AI Systems](#) and the [Companion Guide on Securing AI Systems](#) to support implementation of the Guidelines. These resources focused on the technical robustness and cybersecurity of AI systems, offering baseline recommendations against threats such as supply



chain attacks, adversarial machine learning, data poisoning, and model theft.

In 2022, Minister Teo [announced](#) the launch of AI Verify at the World Economic Forum's Annual Meeting in Davos. AI Verify is a voluntary AI governance testing framework and toolkit. The tool seeks to enable trust-building by encouraging greater transparency, accountability, and safety through the verification of the performance of an AI system against developers' claims. In June 2023, Minister Teo announced the establishment of the AI Verify Foundation to promote the development of tools for responsible AI and boost AI testing capabilities to meet the needs of companies and regulators globally. The seven pioneering members include: IMDA, Aicadium (Temasek's AI Center of Excellence), IBM, Microsoft, Google, Red Hat and Salesforce. In May 2024, Singapore launched AI Verify [Project Moonshot](#), one of the world's first Large Language Model evaluation toolkits, to address emerging safety and security concerns.

During the 2025 AI Action Summit in Paris, Singapore announced new AI safety initiatives, including research on multilingual [red teaming](#) and [LLM safety](#) across 10 languages as well as a [Global AI Assurance Pilot](#). The Global AI Assurance Pilot was launched by AI Verify Foundation and IMDA to help codify shared norms and best practices for the technical testing of generative AI applications, drawing upon industry use cases. The final version was [announced](#) in July 2025.

SECTOR-SPECIFIC GUIDANCE

At the sectoral level, Singapore has released principles and guidelines for the financial services and health sectors. For example, in 2024 Singapore [announced](#) a S\$200 million (US\$154 million) investment over five years to accelerate AI and genomics-driven innovations in healthcare, including the use of generative AI tools for medical documentation and imaging.

Financial Services Sector

In 2018, the Monetary Authority of Singapore (MAS) released the [Principles to Promote Fairness, Ethics, Accountability and Transparency \(FEAT\) in the Use of AI and Data Analytics in Singapore's Financial Sector](#) to serve as a foundational framework for consideration as an increasing number of financial institutions utilize AI and data analytics. Announced in 2019, the [Veritas Initiative](#) acts as an extension of the NAIS, aiming to create a framework in partnership with the financial industry for the responsible use of AI and the incorporation of FEAT principles into AI and data analytics (AIDA) solutions.

In June 2023, MAS [released](#) the Veritas Toolkit version 2.0, an open-source toolkit to enable the responsible use of AI in the financial industry and published a [white paper](#) detailing key lessons learned by leading financial institutions. The consortium included 31 financial industry players, with Accenture and Bank of China as the main developers of the toolkit. BNY Mellon, DBS Bank



(DBS), OCBC Bank (OCBC), United Overseas Bank Limited (UOB) also contributed to the pilot testing of this toolkit. Looking forward, the consortium is expected to focus on responsible AI training and adoption of the Veritas Methodologies and Toolkit.

MAS has since published information papers on [Cyber Risks Associated with Generative AI](#) (July 2024), [AI Model Risk Management \(AI MRM\)](#) (December 2024), and [Cyber Risks Associated with Deepfakes](#) (September 2025) to provide additional guidance to financial institutions on managing model risks posed by increasingly complex and autonomous AI systems. The paper highlights key expectations across the AI model lifecycle, cyber threats arising from generative AI and deepfakes, and potential mitigation measures. The information papers reinforce that model governance should not be treated separately but integrated into an enterprise-wide risk management framework, as AI becomes more widely adopted.

Health Sector

In 2021, the Ministry of Health (MOH) published the [AI in Healthcare Guidelines \(AIHGle\)](#) in collaboration with Health Sciences Authority (HSA) and the Integrated Health Information Systems (IHIS) (now known as Synapse). AIHGle seeks to share best practices for developers and implementers of AI in healthcare. It also complements the existing HSA regulatory requirements of AI Medical Devices (AI-MDs). Other related guidelines include the [Regulatory Guidelines for Software Medical Devices – A Life Cycle Approach](#) updated by HSA in 2022 to provide clarity on the regulatory requirements for software medical devices throughout their entire life cycle. The Guidelines offer the division of responsibilities at the development and deployment stages of AI Medical Devices (AI-MDs).

In May 2023, the Bioethics Advisory Committee opened a two-month public consultation following the release of a series of ethical, legal and social issues related to the use of big data and AI in human biomedical research, culminating in the publication of a final [advisory report](#) in February 2025. The report offers principle-based recommendations to support responsible data use, including best practices on consent, governance and risk mitigation in AI applications. In May 2025, HSA [conducted](#) a public consultation proposing the expansion of regulatory exemptions for AI-powered Software Medical Devices (AI-SaMD) used for public healthcare, aiming to support innovation while maintaining essential safety and oversight standards.

TALENT DEVELOPMENT

The Government has made a concerted effort to [develop](#) an “AI-fluent” workforce by providing basic AI literacy initiatives, upskilling opportunities for tech talent, and incentives for high-quality global AI talent. Singapore currently [has](#) 6,000 AI professionals and is expected to grow its local talent pool to at least 15,000 professionals by 2028. In recent years, IMDA has launched a variety of



programs to support these priorities in partnership with other organizations. Programs aimed at reskilling and upskilling Singaporean professionals in the AI field include the National Research Foundation's (NRF) [AI Fellowship](#) as well as the AISG-led [SkillsFuture for Digital Workplace 2.0](#), [AI Apprenticeship Program \(AIAP\)](#), and [AIAP for Industry](#). The [TechSkills Accelerator \(TeSA\)](#) similarly seeks to encourage the acquisition of relevant in-demand skills, offering job placement as well. Additional partnerships aimed at training professionals with industry experience as AI PhDs have been developed with industry partners such as Alibaba, Nvidia, SenseTime, and Grab. Under TeSA, Singapore is expected to launch the [Pinnacle AI Industry Program](#) during the second half of 2025 to support frontier companies in upskilling their local talent to become expert model builders for enterprise applications.

In 2020, Singapore published [A Guide to Job Redesign in the Age of AI](#) to help organizations adapt workforce roles and tasks alongside AI adoption, supporting companies in reskilling and redesigning jobs to ensure employees remain relevant in an AI-driven economy. Other programs such as [SGInnovate](#) and AI Singapore's (AISG) [Learn AI platform](#) offer opportunities for individuals to engage in talent development programs and knowledge-sharing sessions, some aimed specifically at young learners. In October 2022, Singapore [announced](#) additional commitments in which the government planned to invest US\$50 million in developing local AI talent and double the number of AI apprenticeships by 2027. At the time of the announcement, Singapore had invested more than US\$450 million in AI research and development in the preceding five years.

In April 2023, Singapore [introduced](#) a new visa scheme aimed at attracting global talent in fields including AI and ICT. The scheme includes new bonus criteria for fresh employment pass (EP) applicants who possess skills in shortage in Singapore. The jobs detailed on the [Shortage Occupation List \(SOL\)](#), include cybersecurity and cyber risk professionals, AI engineers and scientists, and systems and software development specialists. The visa scheme complements the existing Tech@SG Program in which the Economic Development Board (EDB) and Enterprise Singapore (ESG) help facilitate EP applications for prospective employees for fast-growing tech companies.

Singapore has also made a concerted effort to support its national AI startup ecosystem as a critical driver for value creation. NAIS 2.0 Programs such as the ECI provide targeted resources to enable Singapore-based startups to build and scale AI solutions locally, while partnerships through the AI Verify Foundation and SGInnovate foster collaboration with major multinational technology firms to support interoperable development and commercial deployment.



OTHER GOVERNMENT INITIATIVES

- [AI Singapore \(AISG\)](#): National program launched in 2017 that seeks to further collaboration between researchers and industry. AISG offers research grants, AI PhD fellowships, innovation and talent development-related programs for Singaporeans.
- [Smart Urban Co-Innovation Lab](#): Southeast Asia's first industry-led lab for smart city solutions development initiated by CapitaLand Investment (CLI) and supported by CapitaLand Ascendas Real Estate Investment Trust, IMDA, and Enterprise Singapore (ESG). The lab focuses on smart city solutions including advanced manufacturing, cloud computing, healthcare, intelligent estates, smart mobility, smart wellness, sustainability, urban agriculture, and urban logistics.
- [SMU-A*STAR Joint Lab in Social & Human-Centric Computing](#): Hosted by the Agency for Science, Technology and Research (A*STAR) and Singapore Management University (SMU), the S\$10 million (US\$7.5 million) lab researches computational social science and human-AI synergy and their use to best enable the deployment of AI-based assistive technologies for human tasks.
- [AI Government Cloud Cluster \(AGCC\)](#): Announced in May 2023 and hosted by SNDGO and Google Cloud, the platform is designed to accelerate AI adoption in Singapore's public sector. It has been implemented for use by Singapore's government agencies and research, innovation, and enterprise (RIE) ecosystem. The Government Technology Agency (GovTech) is the first public sector organization to use the AGCC and is exploring the use of its models in Pair, which was [announced](#) in February 2023 to enable civil servants to boost productivity with the use of large language model-powered assistants while safeguarding privacy, security, and confidentiality.
- [Enterprise Compute Initiative \(ECI\)](#): Announced in Budget 2025 with up to S\$150 million (US\$115.5 million) in funding, the Enterprise Compute Initiative aims to accelerate AI adoption among Singapore-based companies by providing cloud credits, tools, and consultancy for developing Minimum Viable Products (MVPs) and managing change. As a short-term catalyst for AI-driven value creation, ECI aligns with the NAIS 2.0 goal of anchoring AI teams in Singapore. Running until 31 March 2027, the program will launch multiple cohorts in partnership with cloud service providers, helping companies lay the foundations for establishing dedicated AI teams locally.
- [HTX "AI First" Transformation](#): In June 2024, the Home Team Science and Technology Agency (HTX) launched its HTxAI movement, marking its transition to an AI-first agency. This covers both system deployment and the hiring of 500 AI specialist staff focused on mission-critical domains, such as surveillance, robotics, cybersecurity, and generative AI applications like HTX's in-house LLM, 'Phoenix'. Strategic partnerships with companies such as Google Cloud, Microsoft, Mistral AI, and Thales have facilitated the creation of secure, sovereign AI computational and governance infrastructure tailored to Singapore's public safety needs.



RECENT DEVELOPMENTS

Singapore is actively engaging with international partners through the Global Partnership on AI (GPAI) and bilateral forums to develop interoperable AI testing sandboxes. These efforts aim to align governance approaches and technical standards across borders, reinforcing Singapore's strategic role as a global testbed for trustworthy AI governance. Singapore has taken substantial steps to advance AI safety research, addressing emerging concerns related to generative AI as well as potential blind spots in generative AI testing for Southeast Asian languages and cultural sensitivities. In 2025, Singapore [conducted](#) the world's first real-world technical testing of GenAI systems using the AI Verify framework, evaluating transparency, fairness, and robustness across practical use cases.

Singapore, through AI Singapore, has also [invested](#) in Southeast Asia-centric LLM development and evaluation. AI Singapore [leads](#) the SEA-LION project, a family of open large language models designed for Southeast Asian languages and contexts, including versions such as SEA LION v3.5 (8B and 70B). These efforts are [supported](#) by regional expert engagements, such as roundtable discussions on multilingual AI data and evaluation, and the 5th Languages Summit to address Western-centric bias, data scarcity, and culturally sensitive model testing.

Singapore has also released additional guidelines for public consultation, addressing specific considerations related to agentic AI and AI adoption by financial institutions. In October 2025, CSA [released](#) the [Draft Addendum to the Guidelines and Companion Guide on Securing AI Systems for Agentic AI](#) for public consultation. The Addendum outlines how risks arising from agentic AI capabilities can be identified and assessed based on system autonomy and workflows and provides practical controls to mitigate relevant risks across the AI development lifecycle. In November 2025, MAS [released](#) a [Consultation Paper on Guidelines for AI Risk Management](#), outlining proposed expectations for AI risk management oversights, policies, procedures, and related factors.



THAILAND

Thailand is currently implementing its national AI strategy and has issued subsequent nonbinding guidelines to encourage responsible AI adoption and support its ambitions to become a regional AI leader. Recent draft policies indicate that Thailand may be looking to clarify its AI regulatory regime. Over 502 billion baht (US\$15.4 billion) has been [committed](#) to developing core AI infrastructure, including data centers, cloud investment, and open-source models.

In June 2025, Thailand [hosted](#) UNESCO's 3rd Global Forum on the Ethics of AI in Bangkok, highlighting lessons learned from UNESCO's [Readiness Assessment Methodology](#) (RAM), which supports countries' implementation of the [UNESCO Recommendation on the Ethics of AI](#) and is currently being implemented by seven ASEAN Member States. Discussions focused on turning global ethical guidelines into actionable national policies, building regional cooperation mechanisms, and strengthening readiness assessment tools. During the Forum, former Prime Minister Paetongtarn Shinawatra [announced](#) the establishment of AI Governance Practice Center (AIGPC) to foster knowledge exchange and increase expertise in AI ethics, which is set to be the first of its kind in the region and is expected to launch in 2026.

NATIONAL AI STRATEGY

In 2022, Thailand issued the [National AI Strategy and Action Plan \(2022-2027\)](#) to promote Thailand's AI development and application to strengthen the country's economy and competitiveness. The National AI Strategy and Action Plan outlines 15 work plans across five key strategies to advance Thailand's legal readiness, national infrastructure, human capital and education, innovation, and AI adoption. During the first phase (2022 – 2023), Thailand focused on AI adoption in initial target sectors – government services, food and agriculture, and medical and healthcare. Under the second phase (2024 – 2027), the focus has shifted to promoting AI in finance, transportation, public safety, tourism, education, energy, and manufacturing.



AI ETHICS AND GOVERNANCE

In February 2021, the Thai cabinet approved the recommendation by the Ministry of Digital Economy and Society (MDES) to pilot the application of [Thailand AI Ethics Guideline](#) within selected agencies. MDES is expected to assess the initial results before upscaling the Guideline application to the wider government. The Guideline has been in a joint development since 2019 by MDES, Mahidol University, and Microsoft Thailand, and covers six key areas: competitiveness, legal standards, operational codes, security and privacy, equality, and credibility.

Thailand is also expanding international ethical AI cooperation. In January 2025, AI Governance Clinic (AIGC) under the Electronic Transaction Development Agency (ETDA) [signed](#) a Memorandum of Understanding with South Korea's AI Industry Cluster Agency (AICA) to establish collaboration in AI. The government also partnered with UNESCO to develop Thailand's [AI Readiness Assessment Report](#), which notes the talent gap in AI workforce and access to digital tools. The report calls for a shift from high-level strategies to actionable policies to strengthen regulatory mechanisms and cross-sector coordination.

Several Thai government agencies have also released its own AI ethical guideline. In August 2024, AIGC released the [Generative AI Governance Guideline for Organizations](#) to support the application of ethical AI within organizations. In March 2022, National Science and Technology Development Agency (NSTDA) launched its own [AI guideline](#) modeled after the Thailand AI Ethics Guideline for stakeholders and researchers involved in NSTDA's grants and projects. The Office of the Basic Education Commission also launched a [manual](#) for educators, students, and parents, on the use of AI in education.

ORGANIZATIONAL STRUCTURE

Thailand's national AI strategy was developed in coordination by the Ministry of Higher Education, Science, Research, and Innovation (MHESI) and MDES. The National AI Committee under the National Digital Economy and Society Committee (NDESC) was appointed in August 2022 to serve as a driving committee for the implementation of Thailand's national AI strategy, with the Prime Minister serving as Chairman and the Deputy Prime Minister and Minister of Foreign Affairs serving as Vice-chairman.

In 2022, the Electronic Transaction Development Agency (ETDA) [launched](#) the AI Governance Clinic (AIGC) in cooperation with local and overseas partners to develop an AI governance framework regarding electronic transactions and serve as a source of human resource and capacity development. Under AIGC, ETDA released [AI Governance Guidelines for Executives](#) in 2023 to serve as a foundational document in promoting good governance, outlining best



practices to guide corporate executives as more organizations implement AI systems.

In April 2025, the government [appointed](#) a new National AI Committee, with the Prime Minister chairing the Committee. The Committee also [includes](#) ministers from MDES, MHESI, Ministry of Commerce, and Ministry of Finance. Representatives from government agencies such as DEPA, NSTDA, National Innovation Agency (NIA), as well as from stakeholders such as Thai Chamber of Commerce and Artificial Intelligence Entrepreneur Association of Thailand (AIEAT) are also present in the Committee. During its first meeting in May 2025, the National AI Committee reaffirmed the goal for Thailand to become a regional AI hub. To strengthen the country's AI ecosystem, the Committee recommended increasing investment in infrastructure, developing open-source AI platforms, and creating a data bank to support AI development. The Committee also highlighted public health as a key sector where AI could drive economic growth and help Thailand achieve its aim of becoming a medical hub for the ASEAN region.

The legislative branch is also paying attention to AI development. In January 2024, the House of Representative [voted](#) to create the ad-hoc Committee to study the practice and regulation of AI. This ad-hoc Committee, which is composed of parliament members, scholars, and entrepreneurs, has held over 40 meetings with various AI stakeholders to inform future policy. The Committee is conducting a study on the impact and regulatory regime of AI and is expected to present the final study to the full House of Representatives.

TALENT DEVELOPMENT

Thailand is actively working to address its AI workforce shortage. The [reported](#) 21,631 AI professionals in Thailand falls short of the Thai Government's ambition to [develop](#) 10 million AI users, 90,000 professionals, and 50,000 developers by 2027.

In 2024, a total of 113,438 participants [completed](#) AI-related training programs offered by government agencies like the Digital Government Development Agency (DGA), the Digital Economy Promotion Agency (DEPA), and the National Electronics and Computer Technology Center (NECTEC). The Ministry of Higher Education, Science, Research and Innovation (MHESI) is also collaborating with private sector to develop AI-related courses to support Thailand's AI talent pipeline. During the same period, the government also reportedly granted around 1 billion baht (US\$31 million) to support 592 AI-related research and projects. To attract international expertise, Thailand is [developing](#) a Global Digital Talent Visa to enable foreigners with skills in digital technology to work in the country without a work permit.



RECENT DEVELOPMENTS

In September 2025, the Bank of Thailand (BOT) released its [AI Risk Management Guidelines for Financial Service Providers](#) to provide clarity on AI governance and development and security controls for financial service providers. It outlines a framework for AI governance and risk management for financial service providers. The BOT Guidelines task executives and committees with ensuring adequate risk management measures are in place and that there is sufficient human oversight. Additionally, financial providers must implement specific measures to mitigate AI-related risks concerning data, model development, and cybersecurity.

Draft laws to regulate AI are being developed by different government agencies. In 2022, the MDES Office of the National Digital Economy and Society (ONDE) circulated [Draft Royal Decree on AI System Service Business](#) for public consultation, adopting a risk-based approach. Under Draft Royal Decree, high-risk AI is prohibited, including those that use subliminal techniques to influence behavior, rely on credit scoring or sensitive personal information, and utilize real-time remote biometric identification. The Electronic Transaction Committee are tasked with overseeing and issuing mitigation measures to ensure compliance with the law. In addition, foreign AI service providers are obligated to appoint local representative in Thailand.

While adopting a similar risk-based approach, [Draft Principles of Thailand's AI Law](#), introduced by ETDA in June 2025, does not pre-define a list of high-risk AI applications. Instead, each sectoral regulator is granted the authority to announce a list of cases that are considered prohibited or high-risk AI in their own domains. This approach is based on the presumption that sectoral regulators have the deepest understanding of the risks. The Draft Principles also cited international standards and AI regulations in other countries, including [ISO/IEC 42001:2023](#), [NIST AI Risk Management Framework](#), and [EU AI Act](#). ETDA sought additional comments on the right to explanation and imposing additional responsibility on generative AI provider as laid out in the EU AI Act, as well as elements in China's [Interim Measures for the Management of Generative AI Services](#) on legal sourcing of training data and addressing illegal AI use.

Moreover, ETDA also have a package of draft laws in the pipeline. In August 2023, [Draft Act on Promotion and Support of AI Innovation in Thailand](#) was released for public consultation, covering AI sandboxes, data sharing, standards, contract standards, and risk assessments. The public consultation also included [Draft ETDA Notification: Risk Assessment on the Use of AI](#), which mandate AI providers to publish an AI risk assessment report under the oversight of ETDA, and [Draft ETDA Notification: AI Sandbox](#), which operationalizes the AI testing ground. Upon gaining approval from ETDA, AI testers have the responsibility to collect logs, publish information regarding the test, and ensure the security of data involved in the test. Since the 2023 public consultation, there has yet to be further progress.



TIMOR-LESTE

Timor-Leste has no national AI strategy. While AI is [acknowledged](#) as a key driver for the country's digital transformation and broader economic development, no dedicated AI strategies, guidelines, or laws under development to promote adoption. Connectivity, urban-rural divides, and digital talent gaps present major challenges to greater AI adoption. In 2023, Timor-Leste was [reported](#) to have some of the slowest Internet speeds globally, with almost 50% of the population being active Internet users.

There is no dedicated authority overseeing AI policy and adoption. In 2017, the Information and Communication Agency (TIC Timor) was established under the Ministry of Transport and Communications (MTC) to oversee digitalization and government IT.

RECENT DEVELOPMENTS

[Timor Digital 2032](#), the country's primary digital strategy, is being [updated](#) to support AI integration. Furthermore, efforts to [improve](#) ICT infrastructure, connectivity, and skilling programs present an opportunity for the country to establish foundational requirements that can facilitate future adoption.



VIETNAM

Vietnam is currently implementing its national AI strategy and clarifying its AI regulatory regime. Vietnam's AI ambitions were reaffirmed by [Resolution No. 57-NQ/TW](#) in 2024, which set out targets for Vietnam to become a regional AI hub and global AI R&D player.

Recent national assessments [project](#) Vietnam's AI market size reaching approximately US\$1.52 billion by 2030, with around 20% annual growth. Capital inflows into Vietnamese AI enterprises [increased](#) eightfold between 2023 and 2024, with adoption becoming more common in several sectors including financial services, health, and manufacturing. Consumer adoption is also rapidly [expanding](#), with 78% of online Vietnamese users having engaged with at least one AI platform in the past three months and one-third using AI daily.

On June 12, 2025, Prime Minister Pham Minh Chinh signed [Decision 1131/QĐ-TTg](#), issuing Vietnam's first comprehensive List of Strategic Technologies and Strategic Technology Products and introducing a national technology roadmap to guide coordinated efforts and identify priority areas. The decision identifies 11 strategic technology groups and 35 corresponding product categories to guide national investment, procurement, and implementation efforts. The first prioritized group — AI Digital Twins, and Virtual Reality/Augmented Reality (VR/AR) — includes six product categories, namely Vietnamese Large Language Models (LLMs), virtual assistants, domain-specific AI, analytical AI, digital twins, and the metaverse.

However, data, computing infrastructure, investment, and AI talent constraints [continue](#) to present significant barriers to Vietnam's effort to scale AI technologies and adoption. 45% of AI providers [cite](#) talent shortages as a major barrier while 23% report challenges in data and computing infrastructure and 30% note regulatory and legal clarity gaps.



NATIONAL AI STRATEGY

In 2021, Vietnam issued the [National Strategy for AI Research, Development and Application through 2030](#) to promote the research, development, and use of AI and enable Vietnam to become a regional leader in AI. The strategy forms part of a broader effort to promote the country's digital transformation, which the government views as a strong foundation for Vietnam's development as an AI powerhouse.

Vietnam's national AI strategy sets out targets and tasks through 2025 and 2030, focusing on building legal frameworks, digital infrastructure, open data, and fostering AI research and innovation. It further emphasizes the integration of AI into public administration, social services, and national defense and security, while prioritizing the upskilling of workers to boost labor productivity and improve living standards. By 2030, the government [aims](#) to establish three national AI innovation centers and 50 open, linked, and connected datasets. The first of these research centers, the HUST-Naver AI Center, was [launched](#) in 2021 at the Hanoi University of Science and Technology. Jointly operated by HUST and Naver Group of South Korea, the Center connects domestic and international AI actors, supports foundational research, and develops "Made in Vietnam" core technologies.

To operationalise the national strategy, the government adopted the [2024 Action Plan \(Decision No. 699/QĐ-BTTTT\)](#), which provides a framework for coordinated implementation, establishes benchmarks for inter-ministerial evaluation, and specifies mechanisms to support AI adoption across priority sectors.

AI PRINCIPLES

In 2024, the Ministry of Science and Technology (MOST) introduced voluntary [Guiding Principles for Responsible Research and Development of AI \(Decision No. 1290 / QĐ-BKHCN\)](#). The document outlines nine core principles, including integration of transparency, security, and ethical safeguards throughout the AI lifecycle.

ORGANIZATIONAL STRUCTURE

Vietnam's national AI strategy tasks multiple ministries with supporting legal frameworks, infrastructure development, investment promotion, and research ecosystem development. Vietnam's national AI strategy delegates responsibilities across 19 ministries and government agencies.



In 2025, the government [enacted](#) major restructuring to streamline governance and improve coordination for digital and AI strategies. Effective March 2025, the Ministry of Information and Communications (MIC) was merged into MOST, bringing oversight of science, technology, innovation, and digital industries under one ministry. The Ministry of Planning and Investment (MPI) was also merged into the Ministry of Finance (MOF), forming a unified authority managing finance, planning, and investment functions.

TALENT DEVELOPMENT

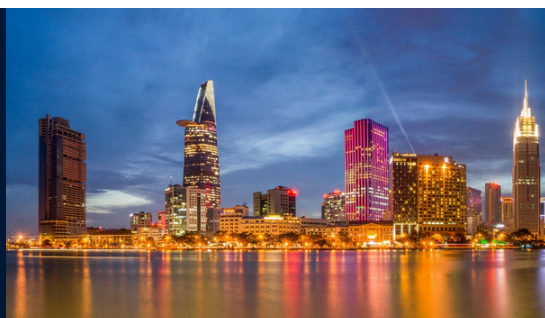
Vietnam has prioritized the development of high-quality human resources in AI and related digital technologies as a cornerstone of its national strategy and issued subsequent dispatches and directors to advance AI curricula and talent development.

In August 2024, the Prime Minister [issued](#) Dispatch No.83/CD-TTg, directing the Ministry of Education and Training (MoET), MOST, MIC (now MOST), MPI (now MOF) to expand AI-related curricula, establish specialised faculties, strengthen collaboration with enterprises and research institutions, and attract international expertise.

In December 2024, Directive No.43/CT-TTg was [issued](#) to accelerate breakthroughs in training high-quality human resources for semiconductors, AI, cloud computing, and other frontier technologies. The directive requires MoET to standardize curricula, provide tuition incentives and scholarships, and promote international cooperation, while assigning MIC (now MOST) responsibility for developing digital forecasting tools and platforms to support training.

In September 2024, [Decision No. 1017/QĐ-TTg](#) approved a long-term human resources development program for the semiconductor industry through 2030, with a vision to 2050. The program sets quantitative targets, including cultivating at least 5,000 AI specialists and 50,000 engineers by 2030.

Most recently, on August 22, 2025, the Party Central Committee issued [Resolution 71-NQ/TW](#), setting breakthrough objectives for education and training through 2035, with a vision toward 2045, emphasizing comprehensive digital transformation and the widespread application of AI and digital technologies. The resolution calls for integrating data analytics, AI, and entrepreneurship into innovation and training programs, expanding talent and postgraduate programs linked to research, strategic technologies, Industry 4.0 priorities, and national key projects, and connecting education with research, science and technology development, innovation, and national digital transformation. It also aims to raise AI and digital competency standards for learners and teachers at all levels through creative and experiential learning, and to involve enterprises and higher education institutions in training programs to strengthen digital



and AI skills. It also aims to adopt policies to involve enterprises and higher education institutions in training teachers and learners in digital and artificial intelligence competency.

The government has [convened](#) workshops and forums, such as the 2025 Vietnam National Forum on Education Innovation with AI, to encourage responsible integration of AI into teaching and learning. Together, these measures reflect efforts towards a systematic approach to building a pipeline of AI talent to meet growing demand.

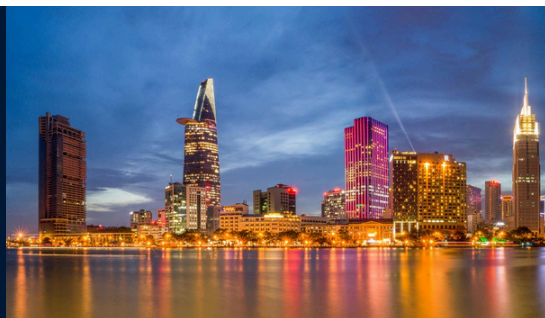
OTHER GOVERNMENT INITIATIVES

Vietnam has continued to strengthen its AI ecosystem through a combination of national programs, institutional support, and international partnerships. Earlier initiatives, such as the [Aus4Innovation](#) program, a ten-year, AUD 33.5 million partnership with the Australian government launched in 2018 remains active. The program provides capacity-building, policy advice, and technical assistance to support high-tech applications in fields including e-commerce, fintech, and AI. These initiatives have contributed to Vietnam's broader innovation agenda while reinforcing its commitment to inclusive socio-economic development.

At the national level, the government has invested in building a supportive institutional framework for startups and innovation. MOST and MPI have established entities such as the [National Technology Innovation Fund \(NATIF\)](#), [National Agency for Technology Entrepreneurship and Commercialization Development \(NATEC\)](#), the [National Startup Support Center \(NSSC\)](#), and the [Vietnam National Innovation Center \(NIC\)](#). These institutions have been tasked with fostering entrepreneurship, promoting technology commercialization, and facilitating domestic and foreign investment in AI-related ventures.

At the local level, select cities are also looking to establish themselves as AI hubs. In 2023, the People's Committee of Ho Chi Minh City [approved](#) a ten-year AI program covering the period 2020-2030, which set targets for digital infrastructure; broadband, 5G, and Internet Protocol version 6 (IPv6) adoption; and a shared urban data ecosystem. In early 2025, Ho Chi Minh City, in partnership with CMC Corporation, [announced](#) its ambition to become the world's first AI city by 2030, driven by the Vietnam Center for Industrial Revolution 4.0 (C4IR).

Launched in March 2025, the Digital Literacy for All Campaign marks another step in [advancing](#) Vietnam's national digital transformation, aiming to equip all citizens with essential digital skills. The initiative offers online training through platforms like binhdanhocvuso.gov.vn, covering topics from safe internet use to digital engagement with government services. Notably, the campaign leverages AI to enhance learning: the platform provides personalized digital skills training for citizens and students, while the Ministry of Education and Training is developing an AI-driven



platform for teachers to support lesson planning, grading, and broader educational tasks, under the vision of “AI education for all.”

RECENT DEVELOPMENTS

In June 2025, the National Assembly passed [Law on the Digital Technology Industry \(Law No.71/2025/QH15\)](#) (DTI Law). The DTI Law provides a legal framework for the digital technology industry, including provisions on AI and the classification of AI systems. The law made Vietnam one of the first countries in the region with specific legal provisions on AI. The DTI Law will come into full effect on January 1, 2026, although select financial incentives have been in effect since July 1, 2025.

However, in September 2025, MOST released the Draft Law on AI for public consultation, with plans to submit it to the National Assembly for review and approval during the 10th session of the 15th National Assembly. Designed as a dedicated legal framework for AI, the Draft Law is expected to supersede the DTI Law. The initial draft reflected the EU’s AI governance approach, proposing a risk-based classification system and ex-ante controls for high-risk AI systems. The Draft Law includes strict pre-approval mechanisms and heavy penalties aimed at protecting internal market interests and limiting foreign technological competition. This has resulted in strong pushback from industry. As a result, MOST has indicated a willingness to maintain a flexible legal framework with less stringent regulatory and compliance measures, and support sandbox mechanisms and voluntary compliance during the initial implementation period. The Draft Law also proposes a National Committee on AI chaired by the Prime Minister, a National AI Development Fund, AI clusters, and tax incentives to attract investment.

If passed, the Draft Law would take effect in January 2026. Provisions on prohibited acts and regulatory sandboxes are expected to be applied 12 months after the law’s effective date, and rules on high-risk AI systems are expected to be applied after 18 months. Technical details will be provided in subsequent decrees.



APPENDIX: AI USE CASES

EDUCATION & SKILLING

Gemini Academy by Google *ASEAN-wide*

OVERVIEW

Gemini Academy is an AI literacy program that trains individuals to use generative AI safely while enhancing their creativity and productivity. Indonesia was the first country in the world to launch Gemini Academy, and the program has since expanded across the Asia-Pacific region.

- 1. Gemini Academy for SMBs**
The Gemini Academy offers a structured training curriculum divided into three categories to address the diverse needs of SMEs at different stages of their development:
- 2. Potential Exporter SME**
Designed for businesses looking to explore international markets for the first time.
- 3. Basic Export SME**
Focused on SMEs with some export experience, aiming to strengthen their capabilities.
- 4. Advanced Export SME**
Tailored for established exporters seeking to optimize and scale their operations.

IMPACT

The Gemini Academy has trained over 200,000 teachers across 35 provinces in Indonesia, making it one of the country's largest AI-literacy initiatives. A Kantar Impact Study completed in 2024 reported that 98% of participating teachers reported feeling more confident using AI tools, and 99% said AI helped them work more efficiently in lesson planning and classroom preparation.

EDUCATION & SKILLING

JuaraGCP by Google *Indonesia*

OVERVIEW

Google Cloud's #JuaraGCP is an online self-study program designed specifically for developers in Indonesia to build practical cloud and AI skills. Through free access to Google Cloud Skills Boost labs and structured badge challenges, participants gain hands-on experience in areas such as data analytics, infrastructure, security, and generative AI using Gemini and Vertex AI. The program is delivered in "seasons" with community-based support from Google Developer Groups, fostering a collaborative environment that helps Indonesian developers upskill for the digital economy.

IMPACT

#JuaraGCP program has significantly expanded cloud and AI literacy among Indonesia's developer community. By May 2025, participants had completed more than 672,000 hands-on labs on the Google Cloud Skills Boost platform, covering topics from cloud infrastructure and data analytics to machine learning and generative AI with Gemini and Vertex AI. This large-scale engagement demonstrates growing local capacity in advanced cloud technologies and aligns with Indonesia's broader digital-skills and AI-talent development goals. The program's structured, gamified learning model — delivered through multiple "seasons" and supported by Google Developer Groups — has created a sustainable community of practice that encourages continuous upskilling.

The initiative contributes to Indonesia's broader digital transformation agenda by equipping developers, students, and professionals with in-demand cloud and AI capabilities aligned with industry needs. Its practical, self-paced approach and strong community support have made JuaraGCP a leading example of scalable, skills-based AI education in Southeast Asia, with expansion targets set to reach 800,000 labs by 2026.

EDUCATION & SKILLING

AI Policy and Skilling Lab by Google *Indonesia*

OVERVIEW

A collaborative initiative by CfDS UGM, Google Indonesia, and KORIKA, this program aims to strengthen the capacity of government institutions and policymakers in understanding and implementing AI. More than just a response to the rapid development of AI, it represents a proactive effort to build a foundation for AI governance that is adaptive, transparent, accountable, and inclusive.

IMPACT

The program has brought together over 400 government officials from ministries and agencies in Indonesia, equipping them with foundational knowledge of AI concepts, generative-AI applications, governance and public-service considerations.

Google for Startup Southeast Asia *Indonesia*

OVERVIEW

A three-month equity-free accelerator program for AI startups based in Indonesia. The Accelerator aims to connect the best of Google's products and people to empower startups to scale their business, towards success in the rapidly evolving landscape of AI and technology. This program is supported by the Ministry of Communications and Digital Affairs.

IMPACT

The initiative aims to empower 100 AI startups over five years, with the first 20 companies selected for the inaugural 2025 cohort. Through access to Google Cloud credits, mentorship, product design guidance, and investor networking opportunities, participating startups are strengthening their technical and business capabilities to scale AI solutions. The initiative contributes directly to Indonesia's national digital transformation agenda by accelerating innovation and entrepreneurship in AI-driven industries.

GENERAL

Agentforce by Salesforce *ASEAN-wide*

OVERVIEW

To deliver truly intelligent customer experiences, companies need more than just a language model — they need systems that unify data, ensure security, and take meaningful action. Salesforce's Agentforce meets this need, built into the Salesforce platform and integrated with Customer 360, enabling fast deployment of autonomous AI agents without added complexity.

Unlike rigid bots and IVR systems, Agentforce provides fluid, personalized interactions that adapt to customer needs. A case study with Astro Airlines (a fictional name for an ASEAN-based airline) illustrates how customers can seamlessly upgrade flights or adjust preferences through a voice-based AI agent — no menus, no frustration.

Core Capabilities - Agentforce is powered by five key elements:

- Role – Agent's responsibilities
- Data – Real-time, structured and unstructured sources
- Actions – Task execution capabilities
- Guardrails – Rules and safety parameters
- Channels – Phone, web, WhatsApp, and more

With Data Cloud and the Atlas Reasoning Engine, Agentforce generates accurate, personalized responses and continuously improves through real-time learning.

IMPACT

Agentforce is already delivering:

- Consistent, human-like service across channels
- Deep data integration for relevant, trusted answers
- Self-learning capabilities that refine performance over time

For businesses like Astro Airlines, it transforms customer service from scripted transactions into intelligent, outcome-driven conversations.

For Customers: Help That Just Works

No more pressing buttons or navigating menus.

Agentforce:

- Understands natural language
- Delivers tailored, instant solutions
- Works across your preferred channels

Whether upgrading a flight or checking a service issue, Agentforce provides smart, personalized support — anytime, anywhere.

GENERAL

Project SEA-LION

**supported by
Gemma 2 by
Google**

ASEAN-wide

OVERVIEW

In multilinguality, Google has collaborated with AI Singapore (AISG), a national program in AI, to launch Project Aquarium, an open data platform for Southeast Asian Languages. Google has also expanded our partnership to support further developments of SEA-LION – a family of LLMs trained and tuned to be representative of Southeast Asia’s cultural contexts and linguistic nuances.

IMPACT

The collaboration between Google and AI Singapore enabled the launch of AISG's first multimodal model, SEA-LION v4, built on Gemma 3's multimodal capabilities.

The team at AI Singapore is currently planning its next iteration of SEA-LION using Gemma, which aims to cater to a wider variety of use cases and offering local communities greater flexibility to help drive AI adoption across the region.

HEALTH & LIFE SCIENCES

PreceptorAI **by Meta** *Thailand*

OVERVIEW

To address the shortage of healthcare professionals and reduce misdiagnosis, PreceptorAI was developed as a standalone chat platform designed to fit seamlessly into doctors' workflows. It integrates with Line, a platform widely used in Thailand. Doctors input a patient's medical history and symptoms into the chat interface, and within seconds, the model generates a list of five possible differential diagnoses, along with detailed explanations and recommended investigations. While the AI provides suggestions, the final decisions — like ordering tests or — are always in the hands of the doctor.

IMPACT

PreceptorAI is specifically designed to identify rare diseases more effectively than general practitioners. In tests, it accurately included the correct disease in the list of five potential diagnoses 92% of the time. By improving diagnostic accuracy and reducing workloads, they are empowering healthcare professionals and ensuring that patients receive the best care — no matter how rare or complex their condition may be.

LEGAL

GPT Legal by Meta *Singapore*

OVERVIEW

Legal teams spend significant time reviewing case law to support or challenge court arguments. Creating summaries of judgments is very time-consuming as judgments can exceed 100 pages. A Justice's Law Clerk (JLC) typically takes 2-3 days to produce a summary for one judgment.

Due to the intensive effort required and the need for legal training, only a subset of judgments is manually summarized. Over 15,000 judgments remain unreported (not summarized), which reduces productivity for legal researchers who must read the full unreported judgments.

IMPACT

This solution significantly enhances the accessibility of case judgments and the efficiency of legal research. By automating the summarization process, the time required to produce case summaries is reduced from days to 10 minutes on average, expanding the number of summarized cases and enabling lawyers to make faster and more informed decisions. With ~75% of lawyers in Singapore using the LawNet platform, the solution is already making a substantial impact on the legal community.

Legal Virtual Assistant for Citizens, Businesses, and Public Servants by Meta *Vietnam*

OVERVIEW

With over 100,000 legal documents stored across various sources, citizens, businesses, and public sector officials often struggle to access and interpret relevant regulations efficiently. The complexity and fragmentation of legal information, coupled with the inefficiency of traditional legal methods, create an urgent need for a solution that can swiftly retrieve, categorize, and update legal information, ensuring accurate and accessible legal guidance for all stakeholders.

IMPACT

This solution cuts legal research time by approximately 30%, significantly enhancing efficiency for businesses, citizens, and government agencies. By democratizing legal knowledge, it enhances legal accessibility for Vietnamese citizens, empowers enterprises to mitigate regulatory risks and foster a more transparent business environment, and streamlines governmental legal operations, driving efficiency across all sectors.

PUBLIC SECTOR

Virtual Assistant for Information Retrieval by Meta *Singapore*

OVERVIEW

Government administrative staff often face delays due to manual processes for retrieving critical information from documents, regulations, and reports. These time-consuming tasks can lead to inconsistencies and slow decision-making. Llama's capabilities address these issues by powering a knowledge management application that streamlines information search and discovery.

IMPACT

Previously, manual information retrieval took 15 to 30 minutes. With the new solution piloted among 1,000 staff members in the Ministry of Science and Technology, retrieval time was reduced to less than 30 seconds — a 98% reduction. This saved approximately 12.5% of their working hours daily, allowing staff to focus on higher-value tasks. The solution's effectiveness was validated through iterative evaluation cycles, combining automated tests with human assessments, and achieving a minimum accuracy threshold of 80%.

SOCIAL GOOD

Aisee by Meta *Singapore*

OVERVIEW

Individuals with visual impairment face daily hurdles, particularly with object identification which is crucial for both simple and complex decision-making. Aisee's assistive device helps them independently access information on the go. Users simply need to hold an object and activate the in-built camera to capture an image of the object. AiSee will use AI to help identify the object and provide more information when queried by the user. The device utilizes bone conduction technology, which enables sound transmission through the bones of the skull.

IMPACT

This ensures that individuals with visual impairment can effectively receive auditory information while still having access to external sounds, such as conversations or traffic noise. This has been an impactful solution for both the visually impaired and blind and supports them to live more independently and lowers barriers to employment. Photos can be found [here](#).

Flood Hub by Google *ASEAN-wide*

OVERVIEW

The Flood Hub provides users with locally relevant flood data and flood forecasts up to 7 days in advance so they can take timely action. It is a visual, easy-to-use resource that displays local riverine flood maps and water trends and gives real-time flood forecasts and alerts based on Google's AI models and global data sources.

The [Flood Hub](#) is designed to meet the needs of governments, local aid organizations, and people directly at risk. All information is free of charge, publicly available, and can be shared over social networks. Forecasts are updated daily.

IMPACT

The Google Flood Hub has significantly [improved](#) early-warning capabilities for communities vulnerable to riverine flooding by providing AI-generated forecasts up to seven days in advance. By combining satellite imagery, weather data, and hydrological models, the platform now covers over 80 countries, offering timely alerts that help governments, humanitarian organizations, and residents prepare and respond more effectively. Its freely accessible, easy-to-use interface has been adopted by disaster-management agencies and NGOs to guide evacuation planning and resource allocation, particularly in regions such as

SOCIAL GOOD

Flood Hub by Google *ASEAN-wide*

IMPACT

South Asia, Sub-Saharan Africa, and Latin America, where reliable local forecasting systems were previously limited. Forecasts are updated daily, allowing for real-time risk awareness that directly contributes to saving lives and reducing economic losses from floods.

Project Green Light by Google *Select Cities*

OVERVIEW

Green Light, a Google Research initiative that uses AI and Google Maps to drive trends to model traffic patterns and make recommendations for optimizing the existing traffic light plans. City engineers can implement these in as little as five minutes, using existing infrastructure. By optimizing not just one intersection but coordinating across several adjacent intersections to create waves of green lights, cities can improve traffic flow and further reduce stop-and-go emissions.

IMPACT

Project Green Light has demonstrated measurable reductions in both traffic congestion and vehicle emissions by using AI to optimize traffic signal timing across city intersections. According to Google Research, cities implementing these AI-generated recommendations have seen up to a 30% reduction in stops and a 10% decrease in intersection-related emissions. The system's ability to integrate with existing infrastructure allows city engineers to deploy updates in minutes, accelerating impact without costly hardware upgrades. Currently operating in more than a dozen cities across Asia, Africa, Europe, and the Americas, the initiative showcases how AI-driven mobility solutions can contribute to cleaner air and more efficient urban transport.

SOCIAL GOOD

Tulibot Smart Glasses by Meta *Indonesia*

OVERVIEW

The inspiration for Tulibot Smart Glasses arose from the challenges hearing-impaired individuals face in environments such as classrooms, meetings, and events, where identifying speakers and following fast conversations is difficult. Traditional solutions like interpreters and transcription apps often lack portability, real-time accuracy, and effectiveness in multilingual settings. This issue is especially pronounced in Indonesia due to its diverse languages and regional dialects.

IMPACT

Tulibot is already transforming experiences across various sectors. In healthcare, it helps patients better understand medical consultations. In education, it provides real-time captions with sign language adaptations. In corporate settings, it promotes inclusivity by enabling hearing-impaired employees to fully participate in meetings. In pilot tests, 85% of users reported increased engagement during events, and over 70% felt more included in group conversations.