ecosystm.

APAC AI Outlook 2025

THE NEXT FRONTIER OF AI RACE: SCALING AI FOR IMPACT

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Introduction

Imagine a future where AI drives real business impact, not just buzz. While its potential is evident, many organisations still struggle to harness it effectively.

In 2024, experimentation and trend-chasing defined the AI landscape. In 2025, the focus will shift to delivering tangible value through robust infrastructure, efficient operations, and skilled talent. Success will hinge on a strategic approach: clear outcomes, strong data management, and governance.

This whitepaper examines key AI trends and the challenges organisations must address to unlock AI's transformative potential. Insights from 17 APAC organisations provide a blueprint for accelerating AI initiatives while managing risks effectively.

The Next Wave of AI: What to Expect in 2025?

Large enterprises have been actively experimenting with AI in 2024, particularly in the wake of GenAI's rapid advancement. Initial enthusiasm, fuelled by business mandates and readily available technology, led to a flurry of AI projects.

However, as the year progressed, a more nuanced understanding of AI's potential and challenges emerged. While the focus remains on identifying use cases to enhance employee productivity and customer experience, organisations are now prioritising foundational elements like data governance, data quality, and skilled talent. More importantly, the emphasis has shifted to maximising ROI from AI investments, given the significant resource requirements. The need for open-source AI and the ability to integrate AI platforms from any tech provider has also become increasingly important, mostly to avoid vendor lock-ins.

AI Wake-up Call: Rethink Your Strategy

> We have enough use cases - we need to prioritise them based on data availability, security and privacy considerations, and ROI.
>
> BANKING CDO, SINGAPORE

> Our AI initiatives have slowed down. We are extremely concerned about data governance starting first with privacy and security.
>
> INSURANCE CIO, AUSTRALIA

> AI has taken us back to the early Cloud days - we are struggling with protecting our organisation from Shadow IT and BYOAI.
>
> RETAIL CTO, INDIA

While organisations have struggled to realise their expected benefits, technology vendors continue to innovate, making AI more accessible to enterprises.

Examining the key trends – both organisational and technological – expected to impact the AI landscape in 2025 can guide enterprises on how to calibrate or start their AI journeys, and more importantly, where to begin.

Here are the 5 key trends that will impact the AI landscape in 2025:

01

Strategic AI

Maximising Impact

02

Rightsizing AI

Targeted, Open-Source AI Models for Efficiency

03

Unified AI

Ensuring Management and Governance

04

Agentic AI

Empowering Intelligent Systems

05

Beyond Productivity

The Human-Centric Future of AI

#1 Strategic AI: Maximising Impact

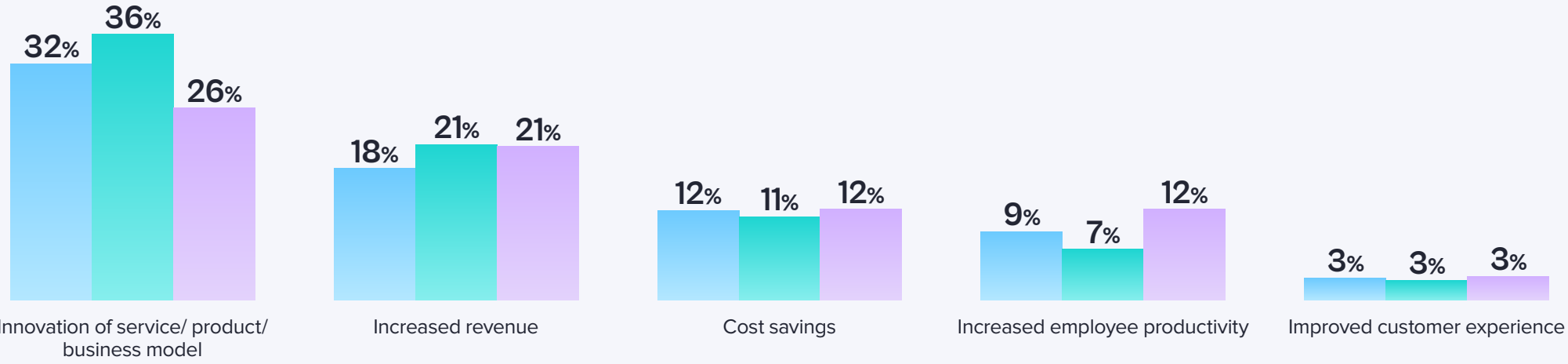
Organisations will adopt a more strategic approach to AI, prioritising projects based on feasibility and business impact.

AI's long-term benefits and high upfront costs challenge traditional ROI metrics, often leading business leaders to push for early results without grasping the complexities. To address this, tech leaders have traditionally focused on quick-win use cases to build trust and internal buy-in. As organisations' AI journeys mature, they will aim to balance short-term wins with long-term AI strategies. The focus of AI investments is shifting beyond employee productivity and customer experience, towards broader strategic goals such as innovation and impact on company financials.

Nearly 60% of Asia Pacific organisations anticipate realising the benefits of their AI investments within 2-5 years. Only 11% expect immediate returns within the next two years.

SOURCE: ECOSYSTM, 2024

BEYOND THE IMMEDIATE: LONG-TERM BENEFITS OF AI



Q: What benefits does your organisation expect from AI in the next 2 years?
N=518; Source: Ecosystm, 2024

We will see a shift from low-risk, non-core use cases to deploying GenAI in core business functions for competitive advantage and improved ROI.

Tech and data leaders will adopt comprehensive AI evaluation frameworks, assessing financial metrics alongside broader impacts like job roles and data governance. Selecting the right use case involves a two-step process: prioritising with structured assessments and evaluating technical feasibility. This will include examining data usability, infrastructure, digital investments, process readiness, and resource needs.

Traditional ROI metrics struggle with AI's long-term, intangible benefits and high upfront costs. While PoCs validate feasibility, they often miss scaling complexities and true costs. To address this, organisations will embrace more nuanced evaluation approaches, balancing tangible and intangible benefits. A holistic costing strategy involving business, technology, data, and finance teams will be a critical aspect to account for infrastructure, hardware, software, and personnel expenses, across the project lifecycle.

CASE STUDIES

Strategic Adoption of AI

Star Union Dai-ichi Life Insurance (SUD Life) focused on tackling a specific, high impact use case – the challenge of outperforming large-cap portfolios in India's competitive capital markets. By leveraging GenAI, the collaboration aims to deliver critical data-driven insights for a new investment product. Outcomes include enhanced data analysis for extracting valuable insights, improved decision-making through data-driven tools for fund managers, and adherence to responsible AI practices. AI has become an essential tool for fund managers to navigate vast data volumes, transforming it from a "nice-to-have" to a "must-have."

StarHub has strategically integrated AI to enhance customer experience, streamline processes, and drive innovation. Their Cloud Infinity, the world's first metropolitan hybrid multi-cloud architecture, uses AI for automated resource management, allowing enterprises to efficiently scale resources and optimise applications and data. They are also collaborating with a major retail operator to deploy a Smart Retail solution that combines GenAI and business intelligence, generating actionable insights from customer data.

#2 Rightsizing AI: Targeted, Open-source AI models for Efficiency

Smaller, open-source, specialised models will gain traction, offering a balance between performance, resource efficiency, and flexibility.

Organisations in Asia Pacific will increasingly leverage open-source AI models to drive innovation and efficiency. This will be a game-changer, offering cost-effectiveness, seamless integrations, and the flexibility to use custom models or leverage vendor-specific capabilities.

While large language models (LLMs) have captured the imagination, smaller, specialised models tailored to specific tasks or domains offer a compelling alternative. These models often deliver comparable performance while requiring less computational power, making them ideal for organisations aiming to train models using proprietary data. Additionally, they are more energy-efficient, aligning with growing sustainability concerns.

> As we monitor the carbon footprint of our AI models, we realise the efficiency of using SLMs trained on more limited datasets for specific, restricted use cases, rather than deploying LLMs for every application.
>
> CDO OF A MANUFACTURING COMPANY, NZ

Purpose-built models, including those designed for local languages and nuanced regional contexts, will be particularly in demand. These models not only address diverse linguistic needs but also enhance explainability and are well-suited for deployment on smaller or edge devices.

As organisations refine their AI strategies, tech and data leaders will evaluate models based on:

- **Governance Constraints**
  Industries with strict privacy and security requirements may prefer models deployable on isolated networks or compliant with specific regulations.
- **Task Complexity**
  Simpler tasks may only require smaller models, whereas complex, data-intensive tasks might require larger, more sophisticated models.
- **Data Availability and Quality**
  Smaller models can perform well with limited data, while larger models often depend on extensive, high-quality datasets.
- **Computational Resources**
  The availability of GPUs, TPUs, and other resources will guide model selection and training strategies.
- **Performance Metrics**
  Latency, accuracy, cost-efficiency, and proximity to data sources will influence model deployment, with many organisations opting for edge computing to optimise inferences.

CASE STUDIES

AI Model to Suit Objectives

Kasikorn Business-Technology Group (KBTG) has developed its own foundational LLM model called "THaLLE" (Text Hyperlocally Augmented Large Language Extension), tailored for finance and the Thai language. THaLLE has achieved CSA Level 2 certification, ensuring compliance with industry standards for accuracy, reliability, and financial analysis. By open-sourcing the model, KBTG is contributing to the AI community while advancing next-generation AI governance frameworks.

Bangkok Bank. The financial industry is rapidly adopting AI to enhance customer experiences and optimise operations. Bangkok Bank champions the synergy of humans and AI working together, embracing a collaborative intelligence approach rooted in human-centred AI principles. By leveraging AI to amplify human potential, the bank aims to achieve significant performance improvements. To unlock the full potential of AI, the bank highlights the need for industry-wide collaboration, responsible innovation, and a steadfast commitment to using AI for the betterment of society.

#3 Unified AI: Ensuring Management and Governance

In 2025, evolving regulations, diverse needs, and responsible AI will drive organisations to invest in tools for visibility, governance, and seamless AI integration.

As AI evolves, data and technology leaders increasingly rely on multi-modal, multi-vendor environments that integrate diverse data sources like text, images, and audio to power intelligent applications. Organisations must navigate complex regulations, such as the EU AI Act, while managing these intricate AI ecosystems. Internal tech teams face the challenge of ensuring compliance, fostering responsibility, and maintaining transparency across multiple AI solutions.

Organisations will consider:

Model Orchestration
Harnessing multiple AI models requires robust orchestration tools to manage and coordinate workflows, ensuring seamless integration and peak performance.

Vendor Management
With AI solutions from multiple vendors, organisations will adopt unified governance frameworks to maintain consistency, security, and compliance. This will allow a vendor-agnostic strategy to enhance flexibility and adaptability to new technologies.

Developer Toolkits
Streamlined toolkits simplify development, automate tasks, and enhance reliability. Features like automated testing, explainability, and integration with diverse technologies enable organisations to accelerate AI innovation.

Automated AI Lifecycle Management
Centralised model inventories will track performance, usage, and lineage, providing real-time oversight. Automated monitoring systems will detect and address issues like model drift and performance degradation.

> **"AI models are prone to bias and drift, which can lead to unintended consequences. To mitigate these risks, we carefully curate and monitor training data and regularly evaluate and retrain models for accuracy and fairness. Automation is essential to achieve this."**
>
> CTO OF A BANK, SINGAPORE

CASE STUDIES

Prioritising Safe and Seamless AI Management

GS Lab | GAVS has developed ZIF.AI that exemplifies governance-driven innovation by embedding responsible AI practices into its GenAI solutions. ZIF.AI has enhanced its predictive and proactive capabilities to prevent application and infrastructure downtimes. Key governance measures include transparency in identifying LLM sources, robust privacy features, and a strong focus on ethical AI practices, ensuring reliability and compliance. These safeguards provide guardrails against issues like AI hallucination while supporting proactive issue detection and improved data integrity assessments.

Feedloop AI, a leading Indonesian GenAI provider, has partnered with IBM to integrate its FL1 AI Large Language Model (LLM) with the watsonx platform. As one of the first Indonesian-language LLMs, FL1 enables local governments and businesses to manage AI with robust governance, risk, and compliance tools. Through watsonx, Feedloop customers can automate regulatory obligation tracking, ensuring compliance with current and future standards while maintaining adherence to business requirements.

#4 Agentic AI: Empowering Intelligent Systems

AI to autonomously execute tasks and drive business value as workflow orchestration becomes increasingly essential.

Traditional automation tools, like RPA, have proven effective in streamlining repetitive tasks. However, they often struggle with the complexity and dynamism of real-world workflows. Agentic workflows, powered by AI agents, offer a more advanced and flexible approach.

> **"We know that incorporating AI requires redefining our workflows. However, traditional workflows are complex and consume valuable resources as we navigate systems, copy-paste sequences, and handle authentication hoops."**
>
> CDO OF A TELECOM PROVIDER, INDIA

Combining AI with automation drives significant gains in operational efficiency, customer experience, and decision-making. As AI advances, agentic workflows will be pivotal in redefining the future of work.

Why organisations will invest in solutions with Agentic AI capabilities:

1 **Autonomy**
AI agents can independently execute tasks, make decisions, and adapt to changing circumstances.

2 **Intelligence**
Leveraging GenAI, they can understand complex instructions, reason, and learn from experience.

3 **Collaboration**
AI agents can collaborate with human workers, augmenting their capabilities and improving efficiency.

4 **Adaptability**
Agentic workflows can adapt to changing business needs and unexpected disruptions.

CASE STUDIES

Automating Workflow Orchestration for AI Efficiency

Siriraj Piyamaharajkarun Hospital (SiPH) has revolutionised its pathology diagnostics through workflow automation. By integrating laboratory systems, image scanning, and central data processing, SiPH has significantly improved efficiency and accuracy in cancer diagnosis. The system's automated workflows and AI-driven slide image analysis—currently piloted for prostate cancer—streamlines the identification of potential cancerous tissues, allowing doctors to focus on high-risk cases. This transformation lays a foundation for future advancements in computational pathology and AI diagnostics in Thailand and beyond.

A global upstream oil and gas company is leveraging AI to automate workflow orchestration and enhance efficiency, particularly in seismic log analysis. By implementing machine learning models, the company automates data cleaning and gap-filling processes, significantly reducing the manual effort required. This enables engineers to process 10-20 logs in 30 minutes – a task that previously took a full day per log - freeing them to focus on higher-value tasks. These advancements not only improve efficiency but also enhance decision-making and productivity by providing faster, more accurate data insights. As the company transitions to operationalising AI, it continues to refine workflows to maximise the technology's potential while fostering cross-functional collaboration.

#5 Beyond Productivity: The Human-Centric Future of AI

In 2025, organisations will shift their focus from merely adopting AI tools to harnessing their potential for human-centred innovation. While productivity tools have been a major focus of AI adoption, the future lies in leveraging AI to enhance human experiences and capabilities.

For employees, AI will become a powerful tool to augment their roles, automate routine tasks, and unlock new opportunities for creativity and innovation. Organisations will prioritise employee education and training to ensure a smooth transition to an AI-powered workplace.

Customers have become accustomed to chatbot interactions over the past few years. In 2024, there was a promise to enhance customer experiences by integrating GenAI and advanced customer intelligence into these interactions. Moving forward, human-centred AI design will be paramount. By prioritising empathy and engagement, organisations can foster stronger customer relationships and brand loyalty. AI solutions will be tailored to meet specific customer needs and preferences, delivering personalised experiences that drive satisfaction.

By prioritising user needs and preferences, organisations can create more personalised and intuitive interactions, for both employees and customers. This involves:

Empathetic Design

Understanding user emotions, motivations, and pain points to design AI solutions that resonate.

Personalised Experiences

Tailoring AI-powered experiences to individual users, delivering highly relevant content and recommendations.

Transparent and Explainable AI

Providing clear explanations for AI-generated outputs to build trust and confidence.

Ethical AI

Ensuring that AI systems are fair, unbiased, and aligned with human values.

Continuous Improvement

Iteratively refining AI systems based on user feedback and performance metrics.

CASE STUDIES

A human-centric approach to AI success

A leading ASEAN automotive company faced significant organisational reluctance to adopt AI, despite management's strong belief in its potential as a business differentiator. To tackle this, the company delayed implementation, focusing on fostering acceptance and aligning cultural shifts with AI integration. Key initiatives included upskilling and reskilling employees to meet the evolving demands of the technology.

The South Waikato District Council (SWDC) adopted a human-centred AI approach to improve information accessibility for its citizens. The council implemented a virtual assistant enabling quick and accurate responses to user queries. With 91.5% accuracy across test questions, the solution enhanced user experience through natural language processing, advanced data filtering, and transparent access to document sources. This initiative not only addressed information silos but also empowered citizens with streamlined, conversational access to vital information, exemplifying AI's role in fostering better public services.

AI across Asia Pacific: A Comparison

ANZ

Key Drivers of AI Adoption

- **53%** Need to reduce costs and automate key processes
- **49%** Pressure from customers
- **34%** Legal and regulatory compliance pressures

Biggest Focus of AI Investments in 2025

- **20%** Employee experience and productivity
- **19%** Back-office business process automation
- **18%** Sales automation and customer lifecycle management

Key Challenges of AI Adoption

- **55%** Cost of implementation/ solution
- **47%** Ethical concerns
- **38%** Limited use cases defined

N=202; Source: Ecosystm, 2024

INDIA

Key Drivers of AI Adoption

- **62%** Need to reduce costs and automate key processes
- **60%** Advances in AI that make it more accessible
- **47%** AI embedded into standard off-the-shelf business applications

Biggest Focus of AI Investments in 2025

- **27%** Customer experience
- **16%** Planning and strategy
- **16%** Optimisation of IT functions

Key Challenges of AI Adoption

- **46%** Data accessibility issues
- **42%** Limited AI skills, expertise, or knowledge
- **38%** Difficulty in integration and scaling

N=216; Source: Ecosystm, 2024

SINGAPORE

Key Drivers of AI Adoption

48% Competitive pressure

31% Environmental pressures

31% Need to reduce costs and automate key processes

Biggest Focus of AI Investments in 2025

32% Back-office business process automation

17% Planning and strategy

15% Employee experience and productivity

Key Challenges of AI Adoption

45% Limited use cases defined

39% Limited AI skills, expertise, or knowledge

33% Lack of the ability to properly govern AI models

N=84; Source: Ecosystm, 2024

MALAYSIA

Key Drivers of AI Adoption

49% Labour or skills shortages

41% Need to reduce costs and automate key processes

39% Competitive pressure

Biggest Focus of AI Investments in 2025

44% Customer experience

17% Sales automation and customer lifecycle management

14% Back-office business process automation

Key Challenges of AI Adoption

51% Data accessibility issues

45% Lack of AI strategy

39% Limited AI skills, expertise, or knowledge

N=71; Source: Ecosystm, 2024

INDONESIA

Key Drivers of AI Adoption

56% Need to reduce costs and automate key processes

37% Advances in AI that make it more accessible

33% Competitive pressure

Biggest Focus of AI Investments in 2025

21% Optimisation of IT functions

20% Sales automation and customer lifecycle management

20% Planning and strategy

Key Challenges of AI Adoption

48% Lack of AI strategy

47% Difficulty in integration and scaling

40% Limited use cases defined

N=81; Source: Ecosystm, 2024

THAILAND

Key Drivers of AI Adoption

42% Advances in AI that make it more accessible

41% Environmental pressures

39% Pressure from customers

Biggest Focus of AI Investments in 2025

29% Back-office business process automation

18% Optimisation of IT functions

16% Sales automation and customer lifecycle management

Key Challenges of AI Adoption

41% Vendor lock-ins

38% Lack of tools/platforms for developing AI models

34% Cost of implementation/ solution

N=76; Source: Ecosystm, 2024

PHILIPPINES

Key Drivers of AI Adoption

47% Need to reduce costs and automate key processes

47% Competitive pressure

45% Labour or skills shortages

Biggest Focus of AI Investments in 2025

23% Customer experience

18% Back-office business process automation

17% Employee experience and productivity

Key Challenges of AI Adoption

43% Limited use cases defined

40% Difficulty in integration and scaling

37% Lack of AI strategy

N=60; Source: Ecosystm, 2024

Scaling for Success: Overcoming Barriers

Despite promising early-stage projects, regulatory hurdles, business readiness issues, and technological limitations continue to hinder widespread AI adoption.

Navigating the Complexities of AI Implementation

Leading the AI Charge: CEO Imperatives

Define AI's Value Proposition. Focus on high-impact AI use cases aligned with business goals, set clear financial objectives, and measure ROI in time, cost, and outcomes. Develop a scalable, sustainable roadmap for AI initiatives.

Address the Human Factor. Bridge the skills gap with AI/ML talent development, manage change to overcome resistance, and empower employees with clear communication, training, and support.

Promote Cross-Functional Collaboration. Align business and IT teams under a unified AI vision, governance model, and centralised AI Centre of Excellence (CoE). Secure executive sponsorship to drive priorities and resource allocation.

Strengthen Governance and Transparency. Embed robust central governance and transparency into the culture while empowering business units with project ownership for ethical and secure AI practices.

Building a Data-Centric Organisation: Guidance for Data Leaders

Conduct a Thorough Data Audit. Address quality issues and leverage automation tools for faster cleaning and annotation. Ensure access to sufficient, high-quality data, including synthetic data when needed.

Prioritise Data Privacy and Security. Prepare to meet a more complex regulatory environment, beyond existing frameworks such as the GDPR, DPDP, PDPA, and the Privacy Acts. Establish internal governance policies and regularly update security protocols to mitigate risks.

Address Data Access and Integration Challenges. Break down silos to enable seamless data sharing and use integration tools to harmonise diverse data sources. Strengthen governance practices for consistency and quality.

Clarify Data Ownership and Intellectual Property Rights. Define clear policies for data ownership and intellectual property, consulting legal experts to ensure compliance with regulations.

Build a Future-Proof Data Foundation. Work with the CIO to upgrade legacy systems, adopt cloud-based solutions, and redefine the data architecture that aligns with the organisation's AI roadmap.

Tech Leadership in the AI Age: A CIO Perspective

Adopt a Pragmatic Approach to AI Models. Balance building custom LLMs with leveraging pre-trained models and open-source solutions, fine-tuning for specific use cases.

Manage Cloud Costs Efficiently. Monitor usage to identify optimisation opportunities, implement strategies like rightsizing and workload scheduling, and explore hybrid or multi-cloud setups for cost and performance balance.

Overcome System Integration Challenges. Align AI initiatives with existing systems through an integration strategy, supported by strong data pipelines, and close collaboration across IT teams. Prioritise interpretability to build trust and ensure usability.

Manage Multi-Vendor AI. Develop a centralised platform for managing models from multiple vendors, set clear standards for selection, integration, and monitoring, and track performance to ensure compliance.

Optimise AI Model Development and Deployment. Use cost-effective AI frameworks, model compression, and quantisation to reduce development costs and improve performance. Leverage cloud-based AI services to minimise infrastructure expenses and speed up deployment.

Involve CFOs in Driving AI Value. Engage CFOs in defining clear objectives, KPIs, and relevant metrics to align AI initiatives with strategic goals. Prioritise high-value, ROI-driven projects that can be quickly implemented and scaled, avoiding resource dilution across too many efforts.

Ecosystm Opinion

As AI experiments reveal successes and setbacks, business leaders will demand tangible outcomes in 2025.

With a rapidly advancing AI ecosystem introducing new models and tools, this will be a pivotal year to harness AI's potential. A healthy dose of realism, coupled with strategic planning, will be crucial to navigating this transformative landscape.

A pragmatic AI approach prioritises high-impact, achievable goals aligned with long-term objectives. Organisations must assess current AI capabilities, identify gaps, and focus on manageable, incremental projects. This flexibility enables adaptation to technological shifts and market changes.

The core of organisations' AI strategies should be human-AI collaboration, ethical AI practices, and continuous research. By prioritising people and ethics, organisations can foster a culture of trust and co-creation. Simultaneously, staying ahead of the technology curve is essential to leverage advancements and implement vendor-agnostic AI solutions.

AI Success Stories from Leading Organisations in APAC

ALGOBASH.COM

Algobash.com is a recruitment platform that offers assessment and self-interviews.

AI Journey

Algobash.com leverages multiple AIs to enhance services:

- **AI Interview Analysis.** Creates an AI interview application that summarises, analyses and grade each interview (based on user pose, action and emotion on video)
- **Advanced Candidate Search.** Replaces NLP with vector databases and RAG search for precise matches based on experience, company, and more.
- **Automated Job Posts.** Generates tailored job descriptions and candidate suggestions using watsonx, based on company context (size, industry, focus, etc).

Outcomes

Using multiple AI models has significantly reduced time-consuming, repetitive tasks, boosting efficiency across the platform. Natural Language Query capabilities have enhanced the ability to find better candidates, surpassing traditional filtering methods.

Challenges

Algobash balances AI innovation with user needs, addressing key challenges:

- **Model Accuracy.** The accuracy and performance of the LLM model may be inconsistent, impacting the quality of results and requiring constant refinement.
- **Benchmarking.** Benchmarking AI models is complex and time-consuming, making it difficult to assess which solutions deliver the best outcomes.
- **Governance.** Unclear AI regulations make full compliance challenging. Algobash ensures final decisions are human-driven, maintaining quality control.
- **Data Readiness.** Data extraction and cleaning with LLMs were initially challenging but have become more streamlined, improving readiness for AI initiatives.

Future Approach

Algobash is collaborating with IBM to co-create an Applicant Tracking System, moving from NLP to LLM-based solutions. LLMs offer greater scalability and accuracy, and Algobash plans to combine them with fine-tuning or prompt-tuning to optimise performance. The goal is to create a more effective and scalable solution that enhances recruitment processes.

BANGKOK BANK

Bangkok Bank, one of Thailand's largest commercial banks, operates 800+ domestic branches and international branches across 15 economies.

AI Journey

The financial industry is rapidly adopting AI to enhance customer experiences and optimise operations. Bangkok Bank champions the synergy of humans and AI working together, embracing a collaborative intelligence approach rooted in human-centred AI principles. By leveraging AI to amplify human potential, the bank aims to achieve significant performance improvements. To unlock the full potential of AI, the bank highlights the need for industry-wide collaboration, responsible innovation, and a steadfast commitment to using AI for the betterment of society.

Outcomes

Real-world applications include personalised marketing campaigns, fraud detection, and more. The bank is also exploring and testing the potential of GenAI, such as AI Assistants, leveraging both foundational and fine-tuned models.

Challenges

While AI presents tremendous opportunities, it also comes with challenges, such as ensuring data accuracy, maintaining cybersecurity, addressing ethical considerations, complying with regulations, and attracting skilled AI talent.

Future Approach

To fully unlock the potential of AI, industry-wide collaboration is essential, along with fostering responsible innovation and maintaining a commitment to using AI for the betterment of society.

BANK ISLAM

Bank Islam is an Islamic bank based in Malaysia that has since extended its services to the broader population.

AI Journey

Bank Islam approaches AI as a transformative opportunity. It launched the "Next Best Product" (NBP) initiative in 2023, integrating machine learning to identify and recommend personalised cross-selling opportunities for existing customers. By analysing customer behaviour and segmentation, the project drives targeted marketing, aimed at improving conversion rate.

Outcomes

- **Consistent Conversion.** Achieved a 5-6% conversion rate from leads generated through automated machine learning.
- **Improved Efficiency.** The automation of targeted list generation and conversion tracking allows for seamless, real-time campaign execution.
- **Personalisation.** Enhanced the ability to anticipate customer needs and deliver tailored offerings, setting new standards in customer-centric AI applications.

Challenges

- **Data Management.** Data is often scattered and messy, making gathering and cleaning a challenge.
- **Model Accuracy.** Maintaining model accuracy over time is difficult as real-world data continually changes.
- **Platform and Cost.** A powerful platform to handle large-scale data quickly can be costly and complex to manage.
- **Collaboration.** Aligning digital teams and business leaders with AI-driven decisions requires strong collaboration, which can be challenging.

Future Approach

- **Governance and Compliance.** Ensures data privacy, transparency, and fairness with clear rules, regular updates, and source code reviews.
- **Data Readiness.** Strengthens governance and adopts cloud solutions to support its AI roadmap.
- **AI Leadership.** Envisions to be a leading financial institution on AI adoption in the country within the next two years.

DOCTORTOOL

DoctorTool enables digital transformation to healthcare providers with a high-impact digital ecosystem.

AI Journey

DoctorTool's most successful AI implementation is its text-to-speech (TTS) feature, used in nearly 2,000 clinics across Indonesia for efficient queue management. Additionally, they are piloting a speech-to-text feature for electronic medical records (EMR), aimed at enhancing data collection and reducing physician administrative workloads.

Outcomes

- **Reduced Administrative Time.** Reduced doctors' administrative time from 50% to 10%, allowing more focus on physical exams.
- **Healthcare Efficiency.** Improved healthcare delivery in remote areas with limited infrastructure.
- **Regulatory Compliance & Fraud Prevention.** Helped meet regulations and reduce insurance fraud.
- **Personalised Treatment.** AI-driven insights and recommendations improve patient care quality.

Challenges

- **Infrastructural Challenges.** Infrastructural challenges like unreliable electricity and internet in remote areas disrupt AI operations, while accommodating diverse Indonesian dialects complicates speech-to-text functionality. Cost concerns add hurdles while transitioning from paper to digital records require significant behavioural change management.
- **Governance and Compliance.** DoctorTool aligns with Indonesia's Ministry of Health's regulatory sandbox but faces challenges in ensuring AI accuracy and meeting regulations, especially with PHR data integration.
- **Data Readiness.** Despite a robust structured data foundation particularly from healthcare providers, inconsistent and unstructured patient data require significant cleansing and standardisation for AI compatibility.

Future Approach

DoctorTool plans to extend its AI capabilities to include personalised health management for patients, analysing patient-generated health data to offer tailored treatment recommendations. The focus will be on improving accuracy, especially considering Indonesia's diverse dialects and cultural healthcare nuances.

EBIZOLUTION (EBIZ)

eBizolution is a business and information technology solutions and services provider headquartered in Philippines.

AI Journey

eBiz leverages AI across its business units to enhance government services. Key initiatives include an AI-powered cybersecurity system for proactive threat detection and response, advanced video analytics (VA) for real-time monitoring (e.g., licence plates, object recognition, and behavioural analysis), and an internal HR tool using watsonx to recommend personnel for government bid opportunities.

Outcomes

The AI solutions drive innovation and security in public services, with its AI-powered cybersecurity system supporting compliance with frameworks like NIST and safeguarding digital assets. Its privacy-focused VA solution ensures responsible monitoring, addressing ethical concerns while delivering accurate analytics.

Challenges

Privacy concerns for video analytics required robust safeguards, such as selective monitoring and centralised AI processing to protect sensitive data. Data readiness remains a barrier and its customers require robust data infrastructure to leverage AI to its full potential.

Future Approach

eBiz plans to automate infrastructure management workflows, reducing resource demands for managed services. Over the next two years, it anticipates growing AI adoption among clients, focusing on improved reporting, analytics, and streamlined operations, with human oversight ensuring critical decision-making.

ENZTEC

Enztec is an orthopaedic medical device supplier that designs and manufactures quality hip, knee and spine instruments for the world's premier implant companies.

Challenges

Excellence in medical device design hinges on in-depth research. But for Enztec, the process was time-consuming. Researchers spent nearly 90% of their week manually sifting through and summarising medical publications. This slowed innovation and limited the scope of research.

Solutions

Enztec embraced AI to streamline their research workflow. Partnering with IBM, they implemented a solution powered by IBM watsonx.ai™ and IBM Watson® Discovery. watsonx.ai's GenAI automatically generates summaries of complex research papers, while Watson Discovery uses natural language processing to analyse and categorise relevant publications.

Outcomes

- **Accelerated Research.** Publication review process in just a few hours, instead of days, resulting in a productivity gain of over 500%.
- **Enhanced Insight Discovery.** Potential device risks and failures identified as early as possible.
- **Improved Decision-Making.** Informed decisions based on comprehensive research insights.
- **Accelerated Time-to-Market.** Faster development of innovative medical devices.
- **Enhanced Research Quality.** More comprehensive coverage of medical literature.

GLOBAL UPSTREAM OIL AND GAS COMPANY

AI Journey

The company has embarked on a journey to leverage AI to streamline operations and enhance decision-making. A key focus area has been seismic log analysis, where AI models have been deployed to automate data cleaning and gap-filling processes. This automation has significantly reduced manual effort, enabling engineers to process multiple logs in a fraction of the time previously required.

Outcomes

- **Improved Efficiency.** AI-powered automation has significantly reduced processing time, allowing engineers to process 10-20 logs in 30 minutes, compared to a full day per log.
- **Enhanced Decision-Making.** Faster data processing has led to more timely and accurate decision-making, optimising operations.
- **Discovery of Missing Data.** AI models have effectively identified and filled data gaps, improving data completeness.
- **Focus on Higher-Value Tasks.** By automating routine tasks, engineers can now dedicate more time to strategic and innovative activities.

Challenges

- **Cultural Resistance.** Overcoming skepticism towards data-driven approaches and fostering a culture of innovation.
- **AI Maturity.** Navigating the challenges of transitioning from experimentation to operationalising AI solutions.
- **Model Maintenance.** Ensuring the ongoing performance and relevance of AI models.
- **Managing Expectations.** Balancing enthusiasm with realistic expectations and addressing concerns.

Future Approach

- **NLP.** Automating the summarisation of operational reports.
- **"Executive GPT" Tool.** Creating an AI-powered tool to quickly access project data and insights.
- **Machine Learning for Predictive Maintenance.** Analysing equipment trip history to develop proactive maintenance strategies.
- **Enhanced Hydrocarbon Reserve Prediction.** Leveraging AI to improve the accuracy of reserve estimates.

GS LAB | GAVS

GS LAB | GAVS is a digital product engineering and ER&D services provider driving innovation for ISVs, startups, and enterprises.

Challenges

GS Lab partnered with IIT Madras to develop the Zero Incident Framework (ZIF.AI). ZIF.AI aimed to address the ongoing challenge of application and infrastructure downtimes. Traditional methods for identifying and resolving these issues can be time-consuming and reactive. ZIF.AI sought to create a proactive solution using AI to predict and prevent downtimes before they occur.

Solutions

GS Lab has harnessed IBM's watsonx GenAI to enhance ZIF.AI, launching innovative solutions:

- **Panoramaa.** Delivers a unified enterprise view by analysing application and back-end data, enabling proactive detection of latency and functionality issues while identifying root causes of application problems.
- **3rdi.** Leverages GenAI to predict failures by triangulating security and operations data.

Outcomes

- **Improved predictive capabilities.** ZIF.AI can now anticipate potential failures with greater accuracy, allowing for proactive intervention.
- **Proactive issue detection.** The solutions actively monitor for issues, enabling preventative measures to be taken before they impact operations.
- **Enhanced data integrity assessment.** The platform's data analysis capabilities improve overall data integrity assessments.

> Our long-standing engagement with IBM has now expanded into GenAI. IBM watsonx's transparency, its ability to identify LLM sources and correlations, and robust privacy features were key factors in our decision to embed it into our ZIF.AI solution. The responsible AI approach and governance framework of watsonx provide crucial guardrails against hallucination and other potential pitfalls associated with generative AI, enabling us to deliver more reliable and ethical AI solutions.
>
> **Balaji Upilli, President of Transformation & Strategic Initiatives, GS Lab | GAVS**

KASIKORN BUSINESS-TECHNOLOGY GROUP (KBTG)

KASIKORN Business-Technology Group is the technology arm of KASIKORNBANK (KBank), one of Thailand's leading commercial banks.

AI Journey

KBTG Lab has been integrating machine learning with a strong focus on responsible AI since 2017. Key applications include the use of explainable AI for asset valuation. KBTG has also developed its own LLM, “THaLLE” (Text Hyperlocally Augmented Large Language Extension), for enhanced financial insights and has collaborated with regulators to establish responsible AI practices.

Outcomes

- **Robust AI Governance.** KBTG implemented a strong AI governance framework, educating employees about responsible AI and exploring external frameworks and guidelines with continuous updates and adaptive policies.
- **Operational Transformation.** Achieved a 75%+ GenAI adoption rate among employees within 6 months of launch, encourages employees to explore the tool in a safe and controlled environment to boost productivity.
- **Trust and Transparency.** Ensured ethical AI usage by having human-in-the-loop to review AI-generated outputs in customer interactions, maintaining customer trust.
- **AI Leadership.** Developed "THaLLE" LLM focusing on finance and the Thai language. This provides KBTG with insights into how to innovate with GenAI, and helps refine its next-generation AI governance framework.

Challenges

- **Governance and Compliance.** Balancing innovation with adherence to global AI safety guidelines.
- **Employee Readiness.** Ensuring staff are trained to adopt and implement AI responsibly.
- **Trust Building.** Maintaining customer trust through transparent and ethical AI practices.

Future Approach

- **Agentic AI.** Empowers individuals to collaborate with specialised agents to execute more complex tasks.
- **AI Governance.** The expanded use of AI agents highlights the necessity for a robust yet adaptable AI governance framework.
- **AI Safety.** Right evaluation criteria, well-defined policies, ethical guidelines, and model benchmarking protocols prior to AI applications in real-world contexts.

LEADING ASEAN AUTOMOTIVE COMPANY

AI Journey

- **AI-Powered HR.** Leveraging proprietary information for specialised HR tools.
- **Intelligent Manufacturing.** Automating tasks including quality checks and robotic spare part production.

Challenges

- **Cultural Resistance.** Organisational reluctance to embrace AI posed a major challenge despite management's conviction in its potential as a business differentiator. To overcome this, the organisation delayed implementation to focus on building acceptance and aligning cultural shifts with AI adoption.
- **Governance Concerns.** Safeguarding proprietary information and ensuring the accuracy of GenAI outputs were top priorities. Extending AI use cases to external consumers added complexity, requiring robust validation frameworks to address concerns about the reliability of external training data.

Future Approach

- **Data-Driven Innovation.** Ongoing project to collect relevant proprietary data in a data lake for all AI initiatives and future AI readiness.
- **Skill Development.** Upskilling and reskilling the workforce with pilots in selected department to ensure of accurate data input into AI platform for pre-identified HR use cases.
- **Ethical AI.** Adhering to ethical principles and ensuring transparency, fairness, and accountability in AI applications.
- **Phased Implementation.** Starting with high-impact use cases and gradually scaling AI adoption across the organisation.

PHILIPPINE RICE RESEARCH INSTITUTE (PHILRICE)

The Philippine Rice Research Institute (PhilRice), under the Department of Agriculture (DA), develops high-yielding, cost-reducing technologies to ensure rice sufficiency in the Philippines.

AI Journey

PhilRice is integrating AI into key initiatives, including:

- **Pinoy Farmers' Text Centre.** An SMS-based chatbot providing real-time rice-related queries, such as identifying high-yield varieties.
- **RiceLytics.** A data analytics and visualisation platform offering insights on rice production, self-sufficiency, and consumption.
- **Philippine Rice Information System (PRiSM).** Southeast Asia's first rice monitoring system, using satellite imagery and AI for improved planning, decision-making, and disaster preparedness.
- **Data Analytics Centre.** Unifying rice-related data and analyses to strengthen sectoral and grassroots operations, and drive sustainable growth and resilience in the rice industry.

Outcomes

Though still in its early stages, PhilRice expects AI to enhance decision-making, traceability, planning, risk management, and climate resiliency in the rice industry.

Challenges

- **Data Sharing and Ownership.** As a public entity, PhilRice faces challenges in sharing its historical data for AI model development due to concerns over privacy, ownership, provenance, and the costs of subscribing to resulting solutions.
- **Data Readiness.** Ensuring data quality and accessibility for AI applications.

Future Approach

- **AI-Driven Automation.** Automating HR, inventory, and financial systems.
- **Workforce Upskilling.** Investing in employee training to support digital transformation.
- **Expanding AI Applications.** Integrating satellite imagery and pest information, leveraging IBM Environmental Intelligence to enhance climate risk management. Extending AI-driven analytics to other crops within the DA.
- **Data-Driven Decision-Making.** Adopting a hybrid cloud approach to enhance data readiness. Leveraging data lakes and knowledge management to improve decision-making.
- **Industry 4.0 Adoption.** Embracing cloud-based and IoT solutions to modernise agricultural practices.

SIRIRAJ PIYAMAHARAJKARUN HOSPITAL (SIPH)

SiPH is a leading private hospital in Thailand.

Challenges

SiPH aimed to enhance its Pathology Information System (PIS). The existing system lacked integration between laboratory workflows, image scanning systems, and centralised data processing. This fragmented approach hindered efficient cancer diagnosis and slowed down the overall process.

Solutions

SiPH partnered with IBM's Supply Chain Industry 4.0 team in Singapore to simplify data entry through smart forms and speech-to-text, integrating tissue specimen data with high resolution slide images. These images undergo AI-powered analysis using SiPH's algorithms and IBM Power 10 MMA inferencing capabilities. This streamlined process enables real-time access to integrated data, allowing doctors to quickly and accurately diagnose potential cancer cases.

Outcomes

- Speech-to-text technology reduced typing errors.
- The integration between the PIS and workflows workflows allows for seamless status tracking of each step in the process.
- Automated workflows and AI-driven slide image analysis (currently piloted for prostate cancer) streamlines the identification of potential cancerous tissues.
- The platform enables doctors to concentrate on high-risk cases, significantly improving diagnostic accuracy and efficiency.
- AI assists in prostate cancer case screening by helping pathologists prioritise preliminary results.

> Today's success in transforming our pathology workflows and enhancing diagnostic quality will ultimately lead to more accurate cancer diagnostics, benefiting patients across Thailand and ASEAN. This achievement also unlocks new capabilities in computational pathology, paving the way for integrated, automated AI-powered diagnostics to play a pivotal role in the future of clinical care at SiPH.
>
> **Dr. Pornsuk Cheunsuchon, Director of Digital Pathology Centre, SiPH**

SOUTH WAIKATO DISTRICT COUNCIL (SWDC)

SWDC, the governing body of South Waikato District, New Zealand, oversees local infrastructure, public services, and regulatory functions.

Challenges

The SWDC struggled to provide citizens with quick, easy access to vital information. Scattered data across silos led to long search times and frustration for both citizens and employees. Recognising the need for streamlined access, the council aimed to develop a virtual assistant to guide users to relevant information. However, limited technical expertise stalled progress, prompting the council to seek collaboration with IBM for an effective solution.

Solutions

By partnering with IBM, the SWDC embarked on a POC leveraging the strengths of different AI tools.

- **IBM watsonx.ai™**. Boosts the intelligence of the virtual assistant (watsonx Assistant) in answering complex questions.
- **IBM watsonx™ Assistant.** Provides the conversational interface for the virtual assistant.
- **IBM Watson® Discovery.** Empowers the solution to delve into hard-to-reach data and documents, ensuring comprehensive answers.

Outcomes

- **Accuracy & Advanced Intelligence.** 91.5% accuracy rate across 300 test questions; increased sophistication of responses.
- **Enhanced functionality.** Ability to quickly filter large document volumes to pinpoint relevant data.
- **User transparency.** Linking results to document URLs, offering easy access to additional details.
- **Improved user experience.** Enabling natural language queries for fast, conversational data interaction and instant feedback.

STARHUB

Starhub is a major Singaporean telecom company, providing a wide range of services including mobile, broadband, and TV.

AI Journey

StarHub has seamlessly integrated AI across its operations to enhance services, customer experience, and efficiency. Key innovations include Cloud Infinity, the world's first metropolitan hybrid multi-cloud architecture, which uses AI for automated and scalable resource management. Additionally, StarHub is developing a Smart Retail solution for a major Singaporean retailer, combining GenAI and business intelligence to optimise customer insights and engagement strategies.

Challenges

StarHub's AI implementation faces challenges due to its vast data volumes as a leading telecom provider. Data privacy and security are top priorities, requiring rigorous vendor evaluations to meet strict compliance standards. This includes independent data storage and assurance that its data is not utilised by other organisations, safeguarding its commitment to privacy and security.

Outcomes

- Cloud Infinity offers scalable, secure, and flexible cloud services, strengthening StarHub's value proposition as a one-stop solutions provider for enterprises.
- Internally, AI tools like LLM chatbots streamline resource management, empowering employees to focus on more strategic functions.
- With the anonymised data, StarHub is able to create valuable, data-driven insights while ensuring privacy.

Future Approach

AI adoption at StarHub is poised for growth across multiple domains, including customer experience, network optimisation, predictive analytics, and cybersecurity. In the next two years, StarHub aims to deepen AI integration into operations and customer offerings, enhancing operational agility and delivering innovative, data-driven solutions to meet market demands.

STAR UNION DAI-ICHI LIFE INSURANCE (SUD LIFE)

SUD Life, a joint venture between Bank of India, Union Bank of India, and Dai-ichi Life Holdings, is an Indian insurer with a network of 15,000+ branches, including those in rural areas.

Challenges

SUD Life faced the challenge of outperforming large-cap portfolios in India's capital markets. This is a growing challenge both in India and globally.

Solutions

SUD Life partnered with QuantumStreet AI, an IBM Business Partner, to leverage the power of GenAI. By integrating IBM watsonx's advanced AI capabilities, the partnership aims to generate critical insights that will form the foundation of a new investment product.

Outcomes

- **Enhanced Data Analysis.** Leveraging AI to analyse vast datasets and extract valuable insights.
- **Improved Decision-Making.** Empowering fund managers with data-driven insights to make informed decisions.
- **Responsible AI.** watsonx's transparency and robust governance features ensure that AI is deployed in a trustworthy and accountable manner.

> We are excited to partner with a world leading fintech to bring innovative products to our clients. In today's data-driven world, it is nearly impossible for individuals to process the vast amounts of information available, and AI has become an indispensable tool for fund managers, helping derive meaningful insights from growing data volumes. It is no longer a 'nice-to-have' but a 'must-have.'
>
> **Arindam Ghosh, CTO, SUD Life**

THE MALL GROUP (TMG)

TMG is a retail and entertainment conglomerate in Thailand that manages shopping malls, department stores, and entertainment complexes.

AI Journey

- **Enhancing customer experiences.** Innovations like unmanned stores, seamless checkouts, and personalised recommendations redefine shopping. AI-driven pricing ensures competitiveness.
- **Streamlining operations.** Advanced AI processes over 100,000 documents yearly through SAP integration, automating tasks like invoice recognition and boosting efficiency.
- **Driving sales growth.** With watsonx.ai, TMG has streamlined data access and decision-making by enabling natural language queries, reducing reliance on data team for SQL querying and data visualisation.

Outcomes

AI has improved operational efficiency by automating document processing and enhancing decision making, enriched customer experiences with personalised recommendations, and empowered staff with advanced AI tools, reducing reliance on IT support while increasing productivity.

Challenges

Key challenges include managing vast customer data, integrating advanced AI technologies into operations, reducing reliance on technical experts and aligning AI capabilities with business goals to maintain competitiveness.

Future Approach

TMG plans to deploy IBM's watsonx to further support AI-driven capabilities. It aims to reduce manual workloads, upskill employees in AI, and deliver superior customer experiences through advanced technologies at its flagship stores.

YEO HIAP SENG (YEO'S)

A food and beverage conglomerate and a leading name in Asian drinks. With a rich heritage extends more than a century, the company is renowned for its innovation in creating a wide range of high-quality beverages and food products that cater to diverse tastes across the globe.

AI Journey

The company's demand forecasting use case represents a best practice in inventory management, leveraging various AI models to enhance forecast generation and operational efficiency. Though still in its early stages, it exemplifies how technology can drive productivity and precision in business processes.

Outcomes

- **Improved Productivity and Forecast Accuracy.** The company's AI pilot has shown improvement in inventory management and forecast accuracy, leading to better alignment of inventory with actual demand.
- **AI-augmented Workforce.** Employees can now focus on more complex commercial discussions and strategic planning and decision-making, beyond just statistical analysis.

Challenges

- **Cost and Infrastructure.** Implementing AI requires significant investments in infrastructure and software.
- **Data Readiness.** Limited data availability and quality can hinder the full potential of AI.
- **Justifying Investments.** Demonstrating the tangible benefits of AI, especially for major investments, can be challenging.

Future Approach

- **Fortify AI Foundation.** Strengthening its foundation with ERP upgrades and enhanced data analytics to unlock future AI potential.
- **Leverage Predictive and Prescriptive Analytics.** Use AI to improve decision-making and optimise operations.
- **Explore GenAI.** Harness the power of GenAI AI to gain organisational intelligence and a competitive edge.

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Sash is a veteran in primary and secondary research with almost twenty years of experience analysing, writing and training in industries as wide-ranging as Public Sector, Healthcare, Education and Insurance. As VP Industry Insights, Sash helps us see the bigger picture by delving into our insights and developing thought leadership to show buyers and vendors alike where the industry is heading. She is also involved in delivering consulting projects and custom engagements. As an in-demand industry thought-leader, she is a regular speaker and panelist at industry events, and frequently moderates conversations involving key policymakers and senior business & IT executives.

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