Rebooting Thailand's Future: Digital, Data and the Next Growth Catalysts

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- Thailand has built a strong digital foundation over the past two decades. Mobile banking, e-commerce usage, reliable internet connectivity, and new hyperscale investments illustrate the country's high level of digital consumption and infrastructure. Despite this foundation, however, the productive use of digital infrastructure remains in question. Thailand ranked 29th in technology infrastructure, 37th in overall digital competitiveness, and 45th out of 70 countries in the future readiness of its enterprises. Gaps remain in data and AI adoption and investment, academic research output, technology talent employment, and digital R&D. SME adoption remains basic, while larger companies are still working out how to use AI effectively. Enforcement of privacy laws, investment in data protection, and cybersecurity—especially the protection of public-sector data—also lag behind.
- The second Digital Economy Promotion Master Plan addressed human capital, high-value digital transformation, inclusion, and the development of an effective innovation ecosystem. Thailand has built a sizable digital workforce, but it still needs greater depth in AI, cybersecurity, and other advanced technologies. Digital talent is concentrated in major cities, which are also well-known hubs for digital nomads. However, much of this workforce neither works for Thai digital companies nor serves Thai communities. Thailand is a strong digital consumer, but its extensive use of foreign software, cloud services, and AI also creates value leakage. The policy objective is to shift from consumption toward value capture: to develop people who can deploy technology effectively, create higher-value Thai digital businesses, strengthen their global competitiveness, and build the capabilities needed to generate income.
- Building on lessons learned from the second plan, the draft third master plan focuses on rebuilding human capital; high-value digital businesses; productivity and value creation; digital-enabled quality of life and sustainability; and a richer ecosystem for future technologies. Thailand aims to become more data-driven, capture greater value from data sharing, and strengthen public data security. To support these goals, the Thailand Big Data Institute (BDI) has been established as a public organization, and the National Big Data Strategy has been approved. On the government side,

government data centers are being consolidated into a single centralized Government Data Center and Cloud Service (GDCC). The initiative has already consolidated 300 government data centers, approximately 200 agencies, and around 3,000 systems. Health Link, which includes more than 100 hospitals, connects patient records. Travel Link supports data sharing in the tourism sector. Envi Link consolidates environmental information—including air- and water-quality data—for policymakers, the public, and users in sectors such as agriculture. To strengthen technological sovereignty in the Thai language, a consortium of banks, telecom operators, and government agencies is developing Thai-language large language models.

- Thailand has a strong base of digitally ready consumers, but significant gaps remain in business adoption and talent. The country needs an estimated 100,000 data and AI professionals, but currently has only around 20,000. Talent growth is also just 1.4%, compared with a global benchmark of 13%. Many young Thais remain reluctant to pursue science, technology, digital, and data-related fields. Addressing this challenge requires building interest and confidence. Over the past two years, a government-backed initiative funded approximately 1,600 high-school students to receive training in technology and AI, with the aim of showing and inspiring them that these subjects are not beyond their reach and helping to bridge the talent and skills gap.
- Sectors that can leverage digital growth include government and public services, healthcare, agriculture, and tourism—another essential area. Manufacturing, logistics, retail, and the content and creative industries also require attention. Key milestones for assessing Thailand's progress include the development of government services, sustainable digital infrastructure, stronger data sovereignty and mobility, and Thailand's growing ability to develop its own AI technologies in order to reduce dependency on foreign providers. Thailand should also be considered within the broader ASEAN context. An ASEAN development framework is being developed that takes account of the respective strengths and weaknesses of member countries. As a result, significant policy activity is taking place at the regional level, alongside Thailand's national efforts.

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- Across Southeast Asia, people are adopting AI and digital technologies rapidly. Thai people are highly creative and have shown strong momentum in technology adoption since COVID-19. However, the use of technology and AI remains more concentrated in personal use than in work-related use, and AI use in the workplace remains relatively limited compared with other countries in Southeast Asia. Thailand's next growth curve will depend on its ability to capitalize on technology and generate higher value from it.
- To move forward on AI and technology, management teams need to go beyond the pilot stage—which has largely passed—and enter a more connected, agentic era. This means connecting teams that currently use AI separately so that they can work faster, more accurately, and respond better to customers. The distinction between organizations that have progressed and those that have not can be assessed through their ability to use AI for data processing and value creation, streamline workflows through automation, and distribute knowledge effectively.

- At the corporate level, technology is already capable of working with complex, distributed organizational data. Data silos are no longer primarily a technology problem: today's AI can process text, images, videos, numerical data, and other unstructured information across multiple systems. Google's own services illustrate this capability, from integrating traffic information in Maps to enabling users to ask YouTube for a summary of a video. The technology is more than ready to help organizations make sense of the fragmented data they already hold. The primary challenge is on the business side: whether there is a clear mandate, leadership commitment, and operating model to drive data adoption across the company. This includes enabling collaboration among business units and functions that still manage data separately.
- As most large companies operate as groups rather than single entities, they need clear arrangements for data collection, exchange, and collaboration across the group. Technology can support this without requiring every dataset to be moved into a single centralized location. An agentic data cloud, for example, can use AI agents to connect to different data silos, understand internal terminology, and link information across systems. In a logistics company, it could connect warehouse names to inventory data and show what stock is held at each location. The greatest value, however, comes from linking this information with sales, distribution, and route-planning teams so that the business can make faster, more coordinated decisions.
- The benefits of AI technology are not reserved for any specific sector. Rather, everyone has the same opportunity to compete and benefit on a level playing field. Organizations can see what can be done with data more clearly than ever. Data access is increasingly easy, and the time required to build software or test an idea has been reduced from months to a week, or even less.
- Metrics to assess success in AI adoption over the next few years can be viewed through three lenses: whether businesses are creating value from AI through its ability to process data; whether they are streamlining business processes and improving efficiency; and whether they are distributing knowledge more effectively. Another important indicator will be the shift from individual AI use to AI that connects teams and business units, enabling organizations to automate and scale processes across the business.
