

Where Thailand stand now?

Lesson Learnt from Plan#2



Strategy 1

Human Capital for Digital Economy

Large quantity, but no success in deep tech (AI · Cybersecurity · Coding) Concentration in large cities· Foreign Talents (Smart Visa) not attractive· Inadequate measure for quality or impact



Strategy 2

High value digital transformation

Limited capital and incentives–Inflexibility · HW Startup struggled · SME basic use of digital tools, Not yet Industry 4.0 · Legal framework lacks behind technology



Strategy 3

New opportunity and inclusivity

Smart City - Heavy government burden · Local administration lacks capital and self reliance · Private investment not paid off· Yet to address inclusivity issues, e.g. elderly & disables.



Strategy 4

Effective innovation ecosystem

Delays in infrastructure investment(e.g. Thailand Digital Valley) · High cost of access+ Lacks Deep Tech · Legal/incentive slow · Data fragmentation

Common obstacles: Deep tech shortage & Location concentration· Legal and budgeting, slow and lack continuity · Data integration and unable to reach target markets and segments

Structure of 3rd Master Plan (First Draft)

AI-powered Value Creation – Thai-owned Innovation – Global Market Integration

ขยับไทยขึ้นห่วงโซ่มูลค่าดิจิทัลด้วย AI สร้างเทคโนโลยีไทย และเชื่อมสู่ตลาดโลก

รายได้ประชาชาติต่อหัว (GNI per Capita) **14,500** USD

50% increase

Digital Economy Value on GDP

2x Growth

Thailand Digital Export

xx% increase

High Value Digital Players

Below Average

National Income Inequality



Strategy 1

Human Capital for
Digital Innovation and
Transformation
Opportunity



Strategy 2

Develop Thai-based
High Value Digital
Businesses



Strategy 3

Digital Drive for
Productivity and Value
Creation



Strategy 4

Quality of Life and
Sustainability thru
Digital



Strategy 5

Digital Ecosystem
Foundation for Future
Technology



Global Big Data Growth: Where Does Thailand Stand?

The global data economy is expanding rapidly Thailand has strong digital demand, but still needs the people, capabilities and mechanisms to turn data into productivity.

GLOBAL SCALE

USD 358B

Global Big Data Analytics market, 2025

Projected at USD 1.18–1.44T by 2034–2035 ·
CAGR 12.8–14.9%

181 ZB

Global data created in 2025, up from 120 ZB in 2023

76%

of organizations consider real-time analytics essential data management, discovery and visualization lead software spend

THAILAND'S GAP · STRONG DEMAND, LIMITED BUSINESS ADOPTION

18% adoption

Thai consumers are highly digital-ready, yet only ~18% of Thai businesses apply data and AI in real operations (Bank of Thailand). Most SMEs remain at an early stage of transformation.

21,000 vs 100,000 talent

Data and AI specialists available today against the national target for 2030.

13% vs 1.4% skills gap

Demand for digital talent grows ~13% a year while workforce skills grow only 1.4%; more than two-thirds still lack foundational digital skills.

Thailand's challenge is not the amount of data it is our capacity to turn data into productivity.

WHAT THAILAND ALREADY HAS

BDI

Big Data Institute a public organization since 2023, building on GBDi (2019).

National Big Data Strategy

2025–2027, Cabinet-approved: big data to drive ≥35% of the economy by 2027.

GDCC

300+ government data centers consolidated · 219 agencies · 3,065 systems · ~THB 850M saved a year.

Sector Platforms

Health Link · Travel Link · Envi Link.

ThaiLLM

Thai-language and government-specific AI, with a target of 160,000 data and AI professionals by 2027.

DATA

CAPABILITY

PRODUCTIVITY

DATA ECONOMY

The next step is to connect data, infrastructure and demand with talent, technology and business and turn them into a productive data economy.

Challenges & Opportunities: Turning Digital Investment into a Data Economy

THE OPPORTUNITY

THB 41.9B

Thailand's Big Data & AI market, 2025
+18%

THB 5.7T

Thailand's digital economy, 2026
+5.6%

19%

of Thai organizations have adopted AI enterprise-wide

87%

of Thai people use AI — among the highest rates in ASEAN

01 · SUSTAINABLE DIGITAL INFRASTRUCTURE

How can Thailand scale Data Center development sustainably?

- A 100 MW Data Center creates 20–50 direct jobs but consumes electricity equivalent to ~13 million people and water equivalent to ~1.3 million people.
- Electricity demand: 3,800 MW today → ~30,000 MW ahead.
- New policy framework announced 14 August 2026: cost-reflective tariff THB 5–6/kWh · guarantee ~THB 4.5M/MW · PUE ≤ 1.3 · water management plan required.
- Clean energy: UGT2 plus a 2,000 MW Direct PPA pilot.

From competing on incentives → to competing on project quality and readiness

02 · DATA SOVEREIGNTY & DATA MOBILITY

How can Thailand protect critical data while enabling data to create value?

- PROTECT data security · privacy · national interest · critical data
- ENABLE data sharing · interoperability · cross-border data flow · AI innovation
- Opportunity: government and economic-sector data feeding Thai AI use cases.
- Challenge: excessive data localization raises cloud and AI costs, limits access to global AI technology and constrains sharing across fragmented systems.

From “Data Localization” → to “Data Sovereignty with Data Mobility”

THE PATH TO A DATA ECONOMY

DATA CENTER

DATA

AI / ANALYTICS

DIGITAL PRODUCTS & SERVICES

PRODUCTIVITY

DATA ECONOMY

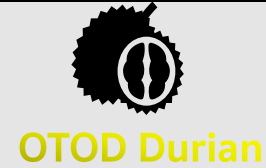
The goal is not simply to have more data or more Data Centers — but to turn data into economic value for Thailand.

Sources: BDI × Chulalongkorn Academic Service Center – Big Data & AI Market Survey 2025 · BDE Digital GDP estimate 2026 · Deloitte Thailand Digital Transformation Survey 2026 · Google–Ipsos AI usage survey 2025 · TDRI · EGAT / Ministry of Energy · NEPC · ERC · Royal Gazette, 14 August 2026 · depa

FDI

GDP & Data Assets

Government Initiatives



**Investment
Schemes**

Core Technology



Infrastructure

Data Center



**Trust
&
Compliances**