

Baseline Study

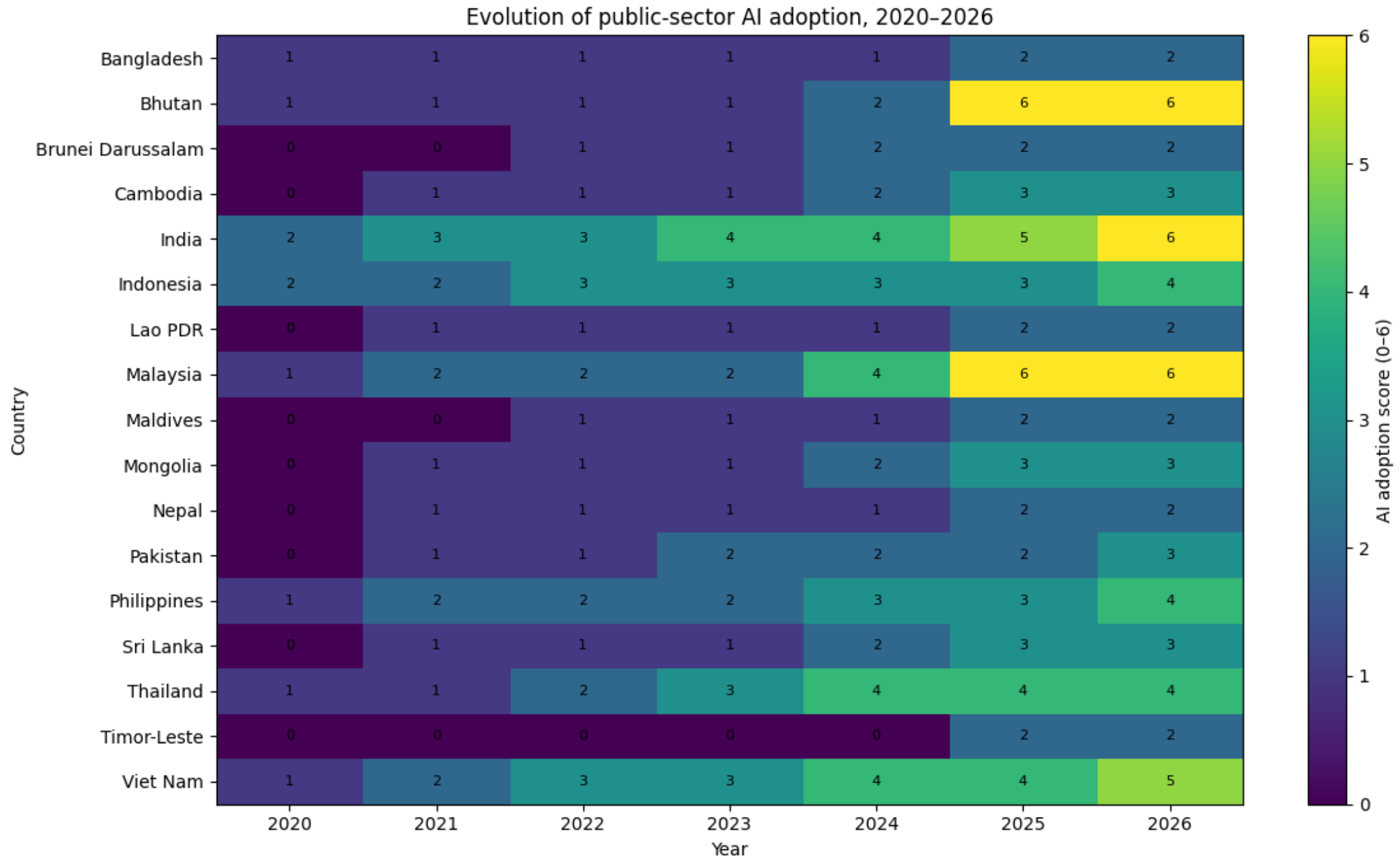
Report on Artificial Intelligence Technology and Standards Needs in South and Southeast Asia

Summary of preliminary findings

Study overview

- Conducted through desk reviews and informant interviews
- 17 South and Southeast Asian countries that were part of the study
- Countries included:
 - Bangladesh, Bhutan, Brunei, Cambodia, India, Indonesia, Laos, Malaysia, Maldives, Mongolia, Nepal, Pakistan, Philippines, Sri Lanka, Thailand, Timor-Leste, and Vietnam.
- The findings were grouped in the areas of:
 - AI policy and regulation, Standards and Interoperability, Data Centers and Cloud Infrastructure, AI Infrastructure (excluding Data Centers), and Public sector AI workforce capacity.
- 15 actionable recommendations were drawn, articulating the benefits.

Evidence of active of AI adoption in Public Sector (2020-2026)



Findings: AI policy and regulation

- **Key gaps:** implementation capacity, AI regulatory coordination, national data governance, compute infrastructure, AI skills, public-sector use-case prioritization, AI safety testing, procurement guidance, and sectoral oversight mechanisms. A common pattern is that many countries have digital transformation strategies but still lack operational AI governance tools, such as model-risk assessment, public-sector AI procurement rules, data-sharing standards, audit mechanisms, and AI incident reporting.
- **Recommendations:** include AI readiness benchmarking, developing a national AI roadmap, building AI governance capacity, creating model AI procurement templates, establishing public-sector AI use-case pipelines, supporting data governance and interoperability, setting up regulatory sandboxes, providing cybersecurity guidance for AI, and fostering regional peer-learning.

Findings: Standards and Interoperability

- **Key gaps** include limited formal adoption of AI-specific standards; weak links between AI policy and national standards bodies; fragmented government data-exchange architectures; limited public capacity for AI conformity assessments; a lack of AI procurement standards; few sector-specific AI validation frameworks; and limited use of AI for Health benchmarking outputs in national digital health systems.
- **Opportunities** include raising awareness of AI standards, providing practical guidance on adopting ITU-T and ISO/IEC AI standards, developing national AI interoperability frameworks, providing AI procurement templates, creating sector-specific AI standards for health and public services, assessing conformity readiness, establishing data-exchange standards, and supporting regional harmonization.

Findings: Data Centers and Cloud Infrastructure

- **Key gaps** include domestic GPU capacity, affordable AI compute for public-sector and research users, data-center energy planning, green cooling, cloud procurement capacity, disaster recovery, cybersecurity certification, sovereign cloud governance, and regional compute-sharing mechanisms for LDCs, LLDCs, and SIDS.
- **Opportunities** for assistance include assessments of AI-ready cloud and data center preparedness, development of public-sector cloud strategies, guidance on green data centers, frameworks for sovereign hosting, establishment of cybersecurity baselines, AI compute-sharing models, regional cloud interoperability initiatives, and practical support to help governments procure, govern, and secure AI-ready infrastructure.

Findings: AI Infrastructure (excluding Data Centers)

- **Key gaps** include limited affordable access to GPUs and AI accelerators, shared national AI compute resources, public-sector AI testing environments, open datasets, data exchange and interoperability, local-language AI infrastructure, AI governance sandboxes, research-to-deployment pipelines, and cloud/HPC skills. Additionally, smaller economies and SIDS face structural challenges, including energy limitations, redundant connectivity, procurement capacity constraints, and difficulties securing sustainable financing.
- **Opportunities** for support include conducting AI infrastructure readiness assessments, creating shared regional AI compute models, developing AI-ready digital public infrastructure, exploring 5G/IoT/edge-AI use cases, establishing public-sector AI testbeds, ensuring data exchange interoperability, and setting cybersecurity baselines for AI infrastructure

Findings: Public sector AI workforce capacity

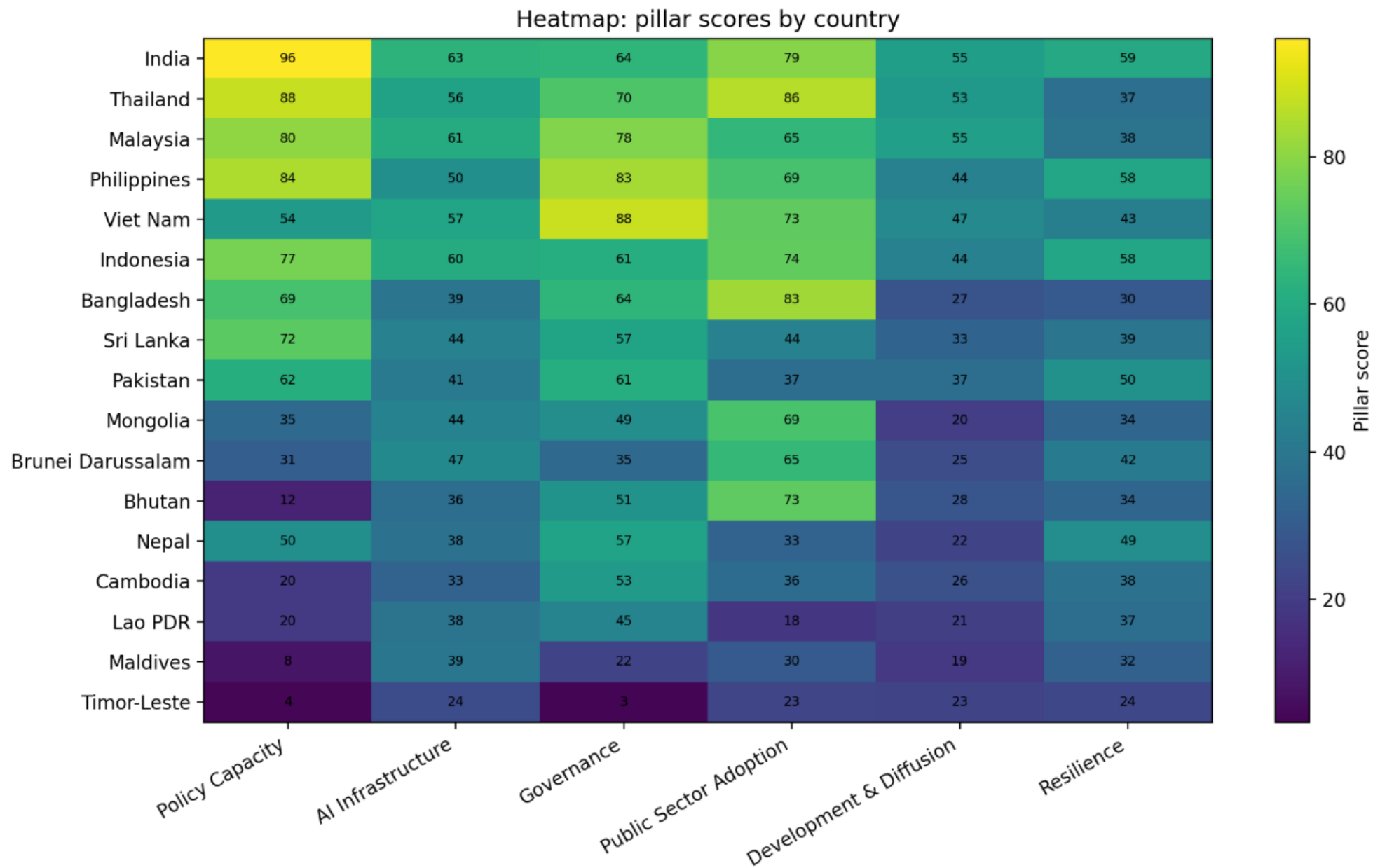
- **Key gaps** include public-sector AI literacy, procurement capabilities, governance, responsible AI training, data governance, data engineering, AI cybersecurity, model risk management, MLOps, AI project management, sector-specific AI expertise, and access to practical AI labs, testbeds, and computing resources. Additionally, many countries lack established training-of-trainers programs for civil-service academies.
- **Opportunities** include developing a regional public-sector AI curriculum, training civil servants as trainers, creating modules on AI governance and responsible AI for policymakers, providing AI procurement templates, AI project-management toolkits, and training on digital public infrastructure and AI interoperability. They could also focus on sector-specific AI skills for health, agriculture, disaster management, and smart cities, with targeted support for LDCs, LLDCs, and SIDS.

Country groups based on AI-readiness

Group	Readiness category	Countries	Total score range (0-100)
1	Higher readiness	India, Thailand, Malaysia, Philippines, Viet Nam	59.98–66.55
2	Upper-middle readiness	Indonesia, Bangladesh, Sri Lanka, Pakistan	45.38–59.87
3	Lower-middle readiness	Mongolia, Brunei Darussalam, Bhutan, Nepal	38.50–40.86
4	Foundational readiness	Cambodia, Lao PDR, Maldives, Timor-Leste	18.39–33.91

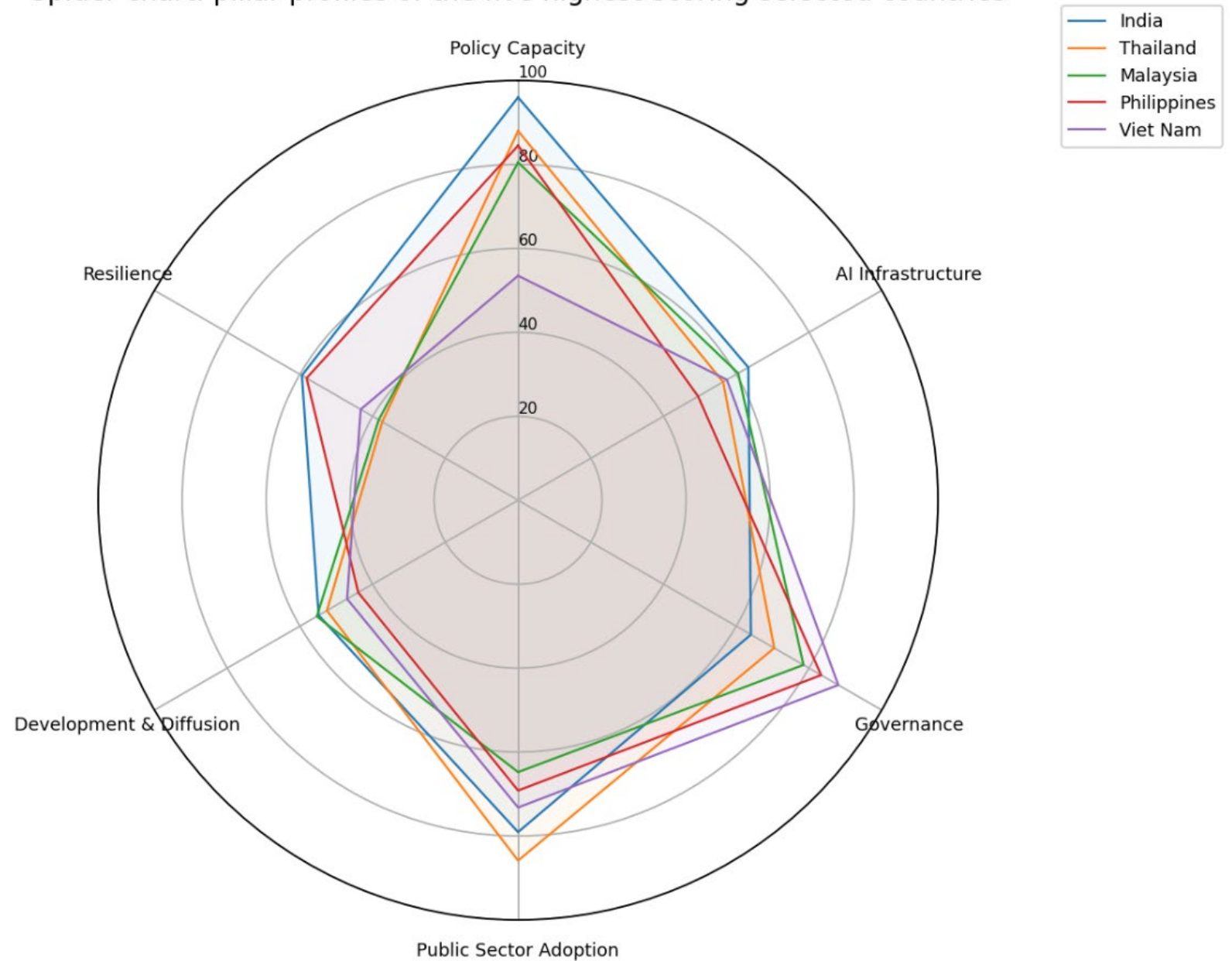
The 17 countries can be grouped into four categories based on the scores for the dimensional pillars of the Oxford Insights Government AI Readiness Index 2025.

Heatmap of pillar-score by country across 17 study countries

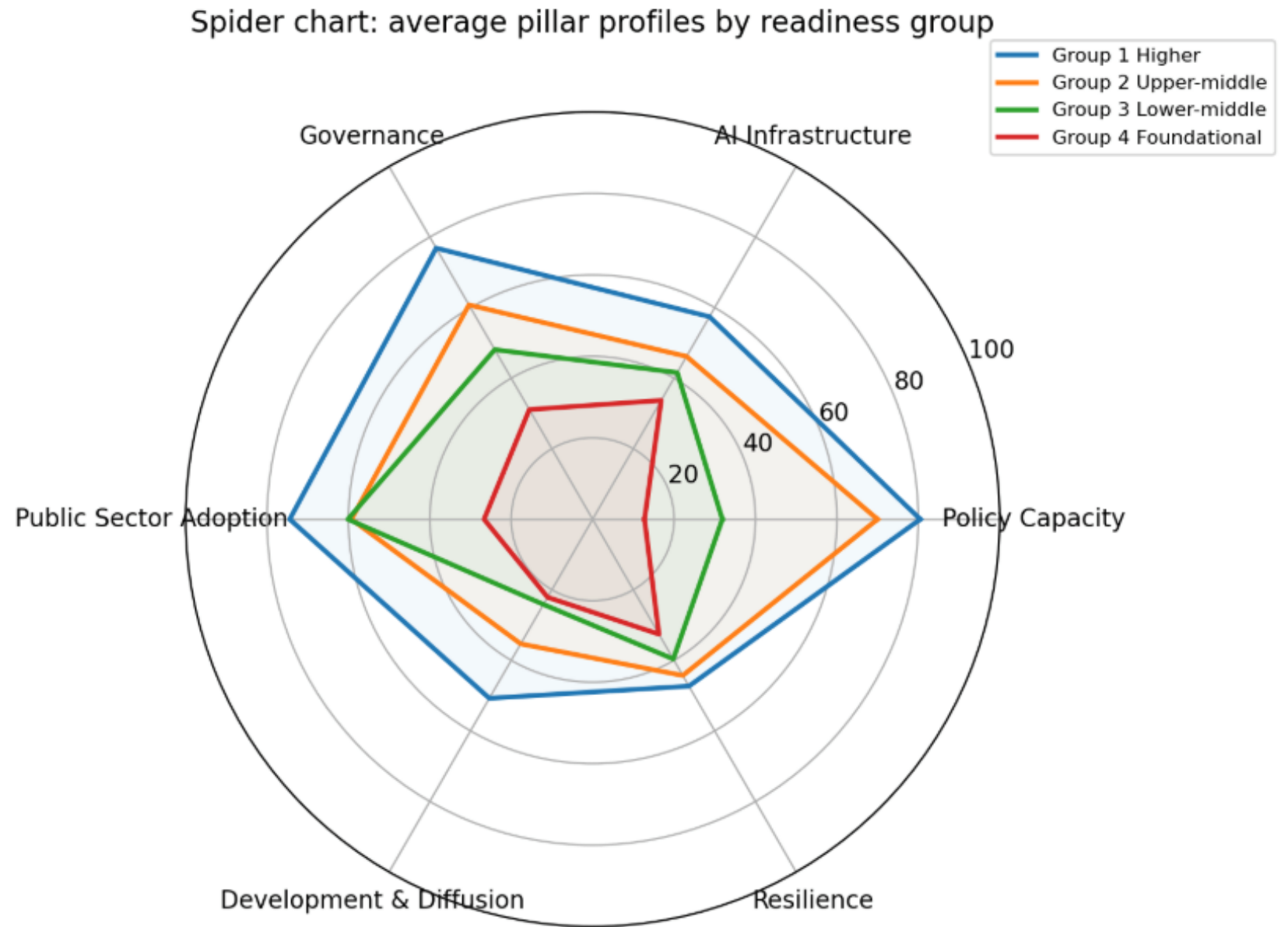


Pillar profiles of the five highest-scoring study countries based on six dimensional pillars

Spider chart: pillar profiles of the five highest-scoring selected countries



Average pillar profiles of the countries in AI readiness in public sector



Thank you