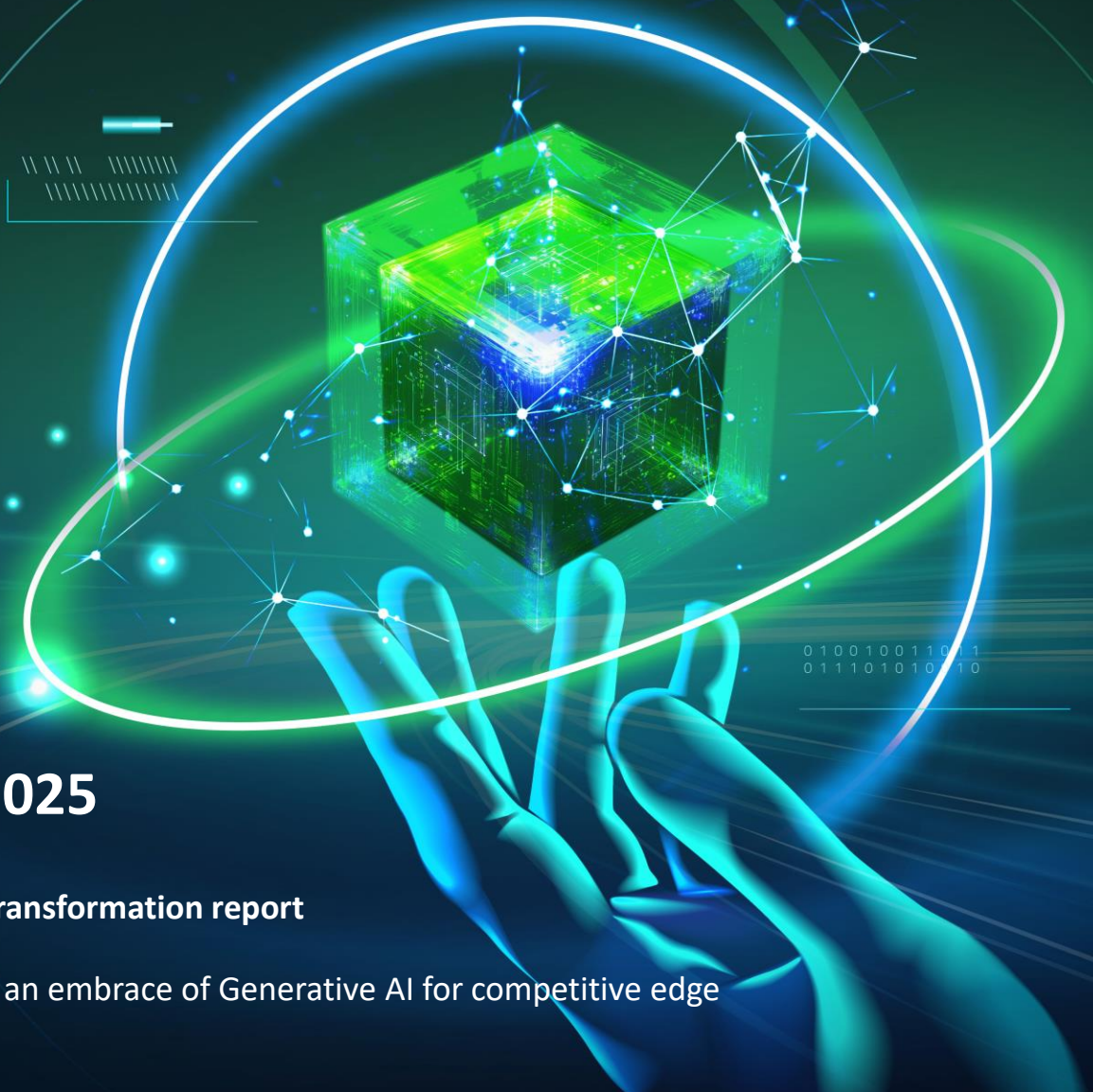




Thailand Digital Transformation Survey 2025

Deloitte Thailand's 5th year annual digital transformation report

A stabilization in digital implementation and an embrace of Generative AI for competitive edge



Dive into Eight Groundbreaking Topics

This report is structured into two main sections, covering a total of eight key topics.

Section 1: Embracing the Transition to Digital Transformation



Exploring the age
of digital disruption



Pushing the boundaries
of transformation

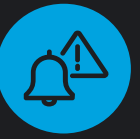


Driving success in
digital transformation



Navigating roadblocks in digital
transformation

Section 2: The State of Generative AI in the Enterprise



Emergence of Generative AI
at a glance



Moving from potential
to performance



Unpacking expectations
and barriers



Evolving
the workforce

Executive summary

Deloitte Thailand's Digital Transformation Survey has been annual conducted since 2020, with the objective to examine the attitudes of digital transformation among companies, with this year that generative AI (GenAI) topic is added as it is sun rising on the current time.

The survey methodology includes both quantitative survey and additional in-depth interviews with C-suite survey respondents, beyond the questionnaire.

It was found that digital implementation in 2024 was almost identical to 2023 and closely resembled that of 2022, differing from 2021 when most companies rushed to implement digital initiatives during the early COVID-19 period. Moreover, companies have increasingly cited successful improvement to business performance due to companies became more selective and strategic adoption with their core business.

Companies generally prioritise investments in improving existing business operation as these initiatives often deliver quick wins. However, prioritising strategic outcomes, including delivering new products or services, and new business models, through digital transformation, are more likely found in higher digitally mature companies. These outcomes position companies to thrive in a competitive landscape.

Challenges persist, particularly in talent and budget, but companies are increasingly prioritising strategic outcomes and leveraging digital technologies for innovation and improved business performance.

For GenAI, leaders in Thailand report lower self-assessed expertise compared to global counterparts, with 95% acknowledging a lack of expertise. Like digital transformation trends, companies in Technology, Media & Telecommunications industry and Financial Services industry demonstrate high expertise, likely due to their advanced digitalisation.

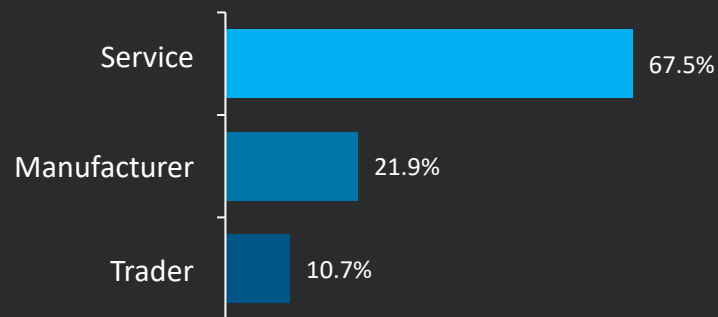
Top executives express concern over insufficient attention to GenAI, with over half believing their companies need to focus more on this technology. Talent, risk, and governance are the least-prepared areas for GenAI adoption, highlighting the need for workforce development. Adoption is led by IT/cybersecurity, marketing, sales, and customer service, while legal, risk, and compliance lag behind.



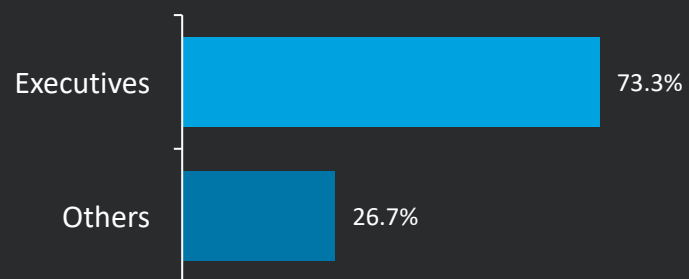
About the Study

Sample structure and survey analysis have been designed to capture diverse perspective on digital transformation and Generative AI (GenAI) in Thailand, covering various business types, sizes, and industries, with a focus on leaders who influence key decisions. It reflects the responses of 334 respondents in total.

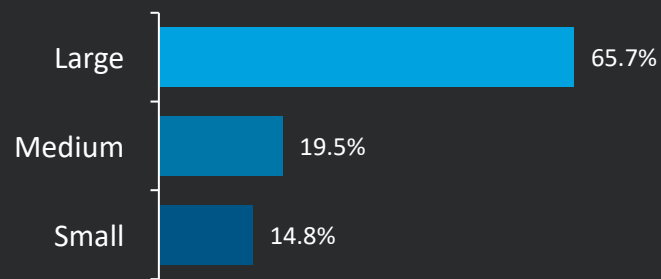
Organisation type



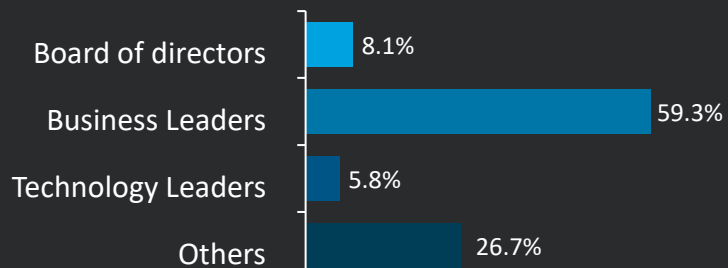
Position



Organisation size



Corporate title



Consumer

38%



Energy, Resources &
Industrials (ER&I)

11%



Financial Services
(FSI)

22%



Life Sciences & Health
Care (LS&HC)

3%



Technology, Media &
Telecommunications (TMT)

17%

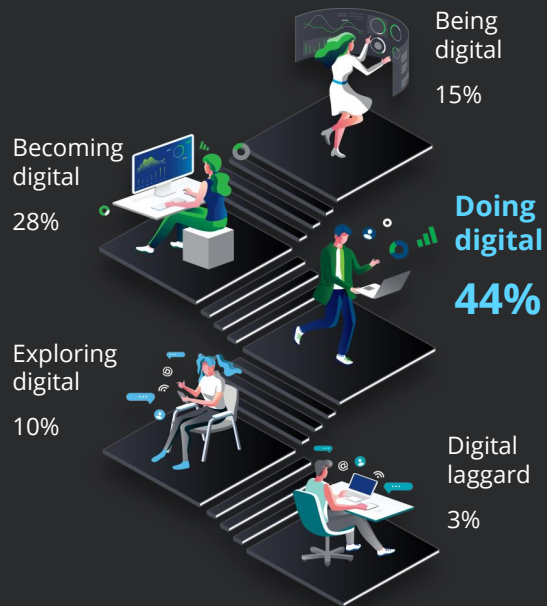


Government & Public
Services (GPS)

9%

Thailand Digital Transformation Survey 2025

In 2025, Thai organisations continue progressing in digital transformation. **Nearly half are in the “Doing Digital” stage.**



Top 3 successful results from digital transformation initiatives



Increased employee productivity



Improved customer experience

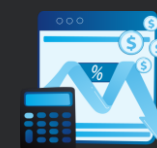


Reduced costs

Reasons why Thai organisations are increasingly aware of GenAI



Improve efficiency and productivity



Reduce costs



Improve existing products and services

Key challenges to achieve digital transformation implementation



Lack of internal and external expertise



Insufficient budget & resources



Legacy on premises information systems did not easily mesh with new technology

Top 3 barriers to GenAI adoption



Lack of technical talent and skills



Lack of an adoption strategy



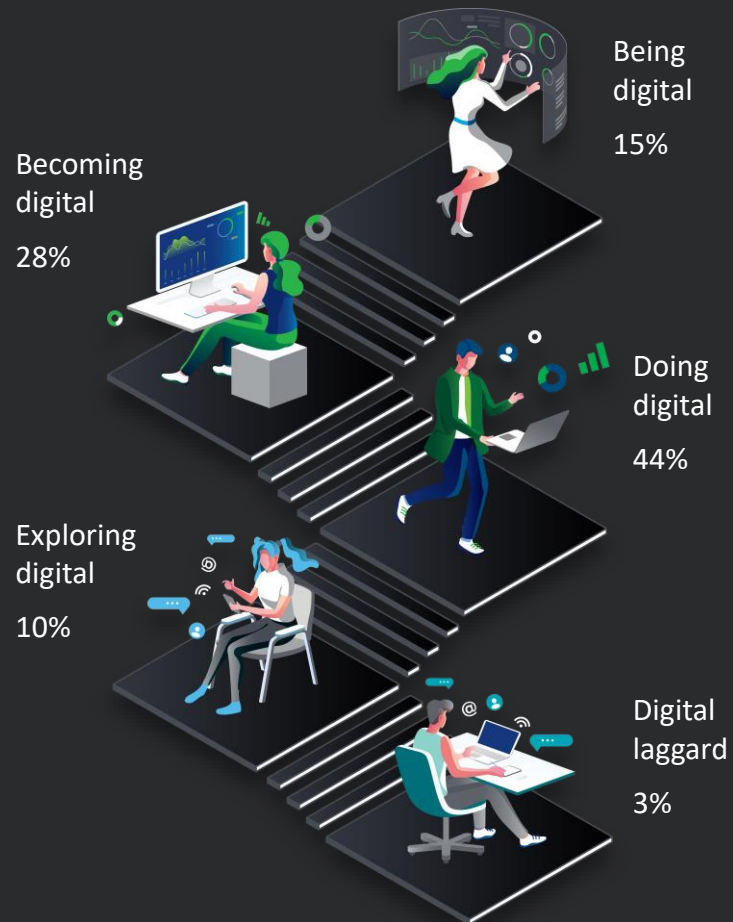
Trouble choosing the right technologies

Section 1

Embracing the Transition to Digital Transformation

Key Findings

Digital Transformation Journey



Top Successful Results from Digital Transformation Initiatives



Increased employee productivity



Improved customer experience



Reduced costs

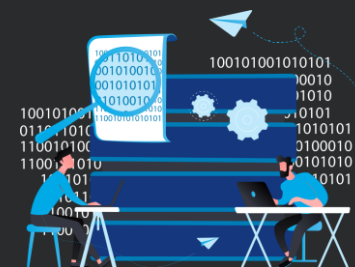
Top Challenges to Achieve Digital Transformation Implementation



Lack of internal and external expertise



Insufficient budget & resources



Legacy on premises information systems did not easily mesh with new technology

Digital Transformation Journey

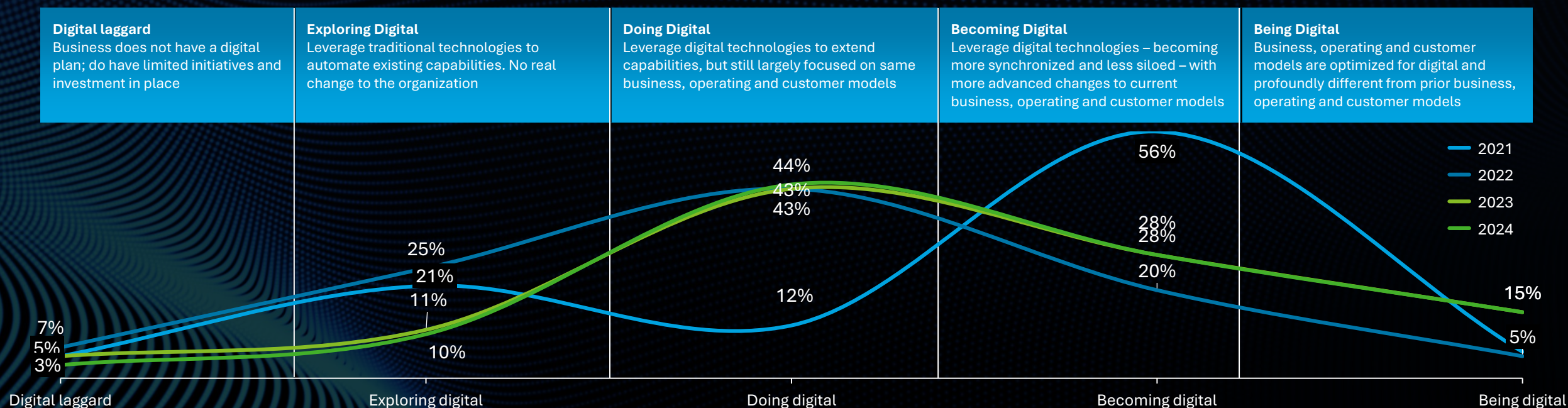
The trend in 2024 almost identical to 2023, and closely resemble that of 2022, as more companies have successfully adopted and integrated digital initiatives that align with their core businesses. This contrasts with 2021, when many companies rushed into implementing a range of digital initiatives across many function without cohesive planning.



We began our digital transformation before the Covid-19 pandemic, enabling us to operate seamlessly when it hit.
– CEO of a Thailand holding company focused on FSI industry



Q: To what extent do the following statements reflect your company's response to the pace of digital disruption?



Note: FSI = Financial Services Industry

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Digital Transformation Journey

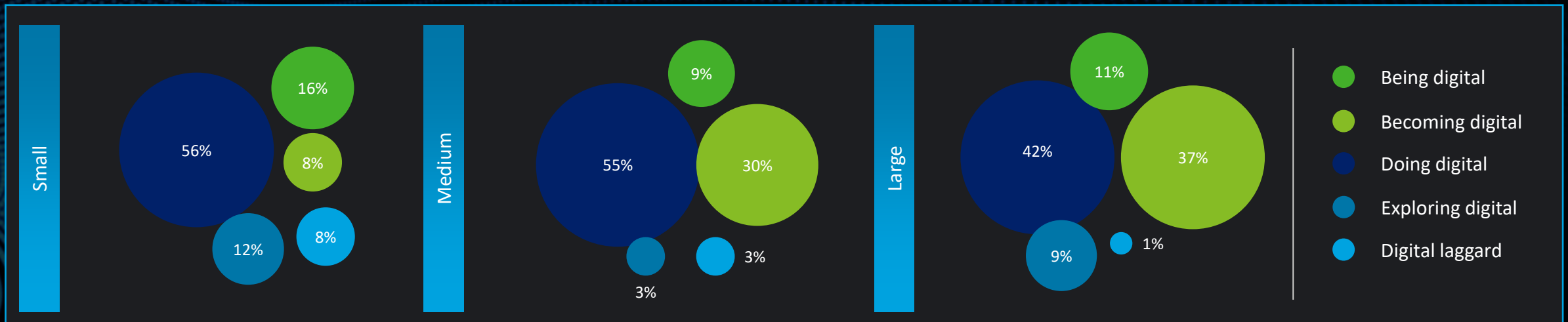
TMT is at the forefront of digital transformation, with FSI also notable strides. Larger companies are further along in digital adoption, while over 50% of small and medium-sized enterprises are primarily engaged in the *doing digital* stage or below. Small companies are particular lagging, with 20% remaining at the *exploring digital* stage or below. Service companies demonstrate greater digital maturity, while manufacturers lag significantly behind.



We recognized the value of digital transformation while developing our strategy, so we began integrating various digital technologies.
– CEO of a Thailand holding company focused on FSI industry



Q: To what extent do the following statements reflect your company's response to the pace of digital disruption?



Note: TMT = Technology, Media & Telecommunications Industry; FSI = Financial Services Industry

Digital Transformation Budget Allocation

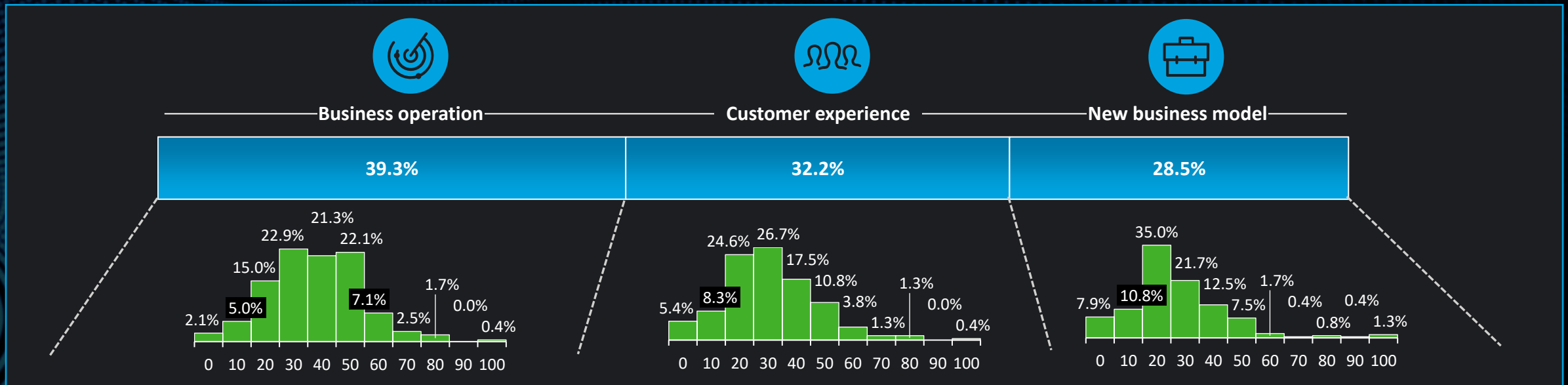
Companies tend to prioritise investments in improving existing business operation by allocating largest proportion of their budget (39.3%) as these initiatives often deliver quick wins. Majority of companies (approximately 70%) allocate 30-60% of their digital transformation budget to improving business operation, 20-50% to customer experience same as new business model.



We must establish a strong business foundation before enhancing customer experience and exploring new business models.
 – CEO of a Thailand holding company focused on FSI industry



Q: If you have a total investment budget of 100%, how many % would you allocate for each selected digital adaptation?



Note: FSI = Financial Services Industry

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Thailand Digital Transformation Survey 2025

Technology Implementation

In 2024, the implementation in advanced technologies has surged. While large companies benefit from greater budgets and resources, AI has emerged as a democratized technology accessible for businesses of all sizes. It is viewed as a “Star”, taking seed with high growth potential and widespread adoption. Meanwhile, data analytics has established itself as a de facto standard from its continuous growth in application across industries over the years.

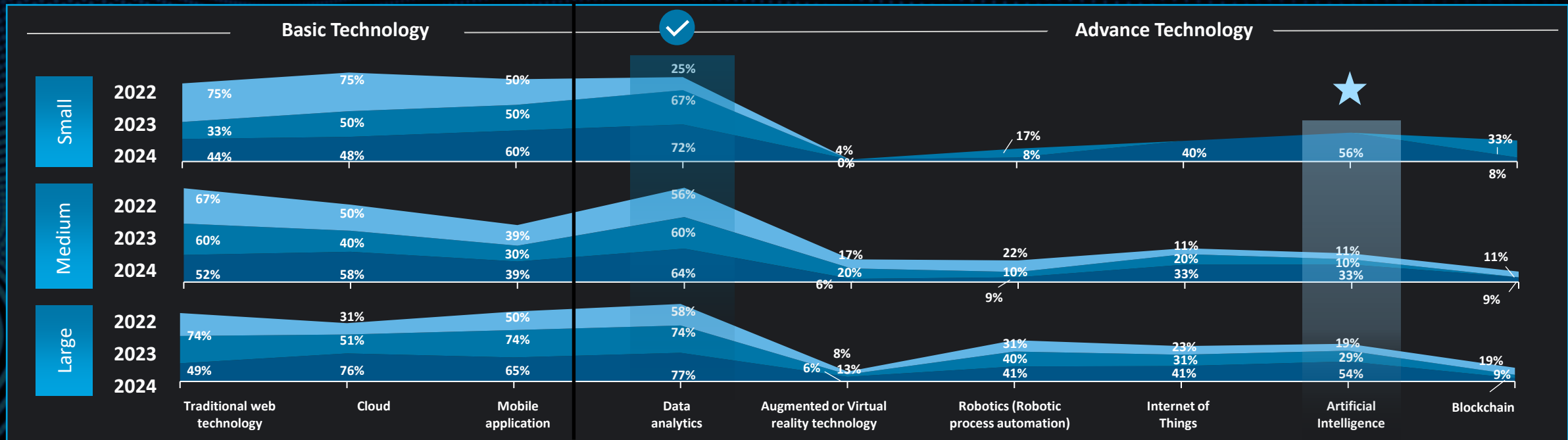


Data analytics serves as the fundamental before implementing GenAI, helping us see where we can improve.

– Executives of a Thailand sustainability solution provider



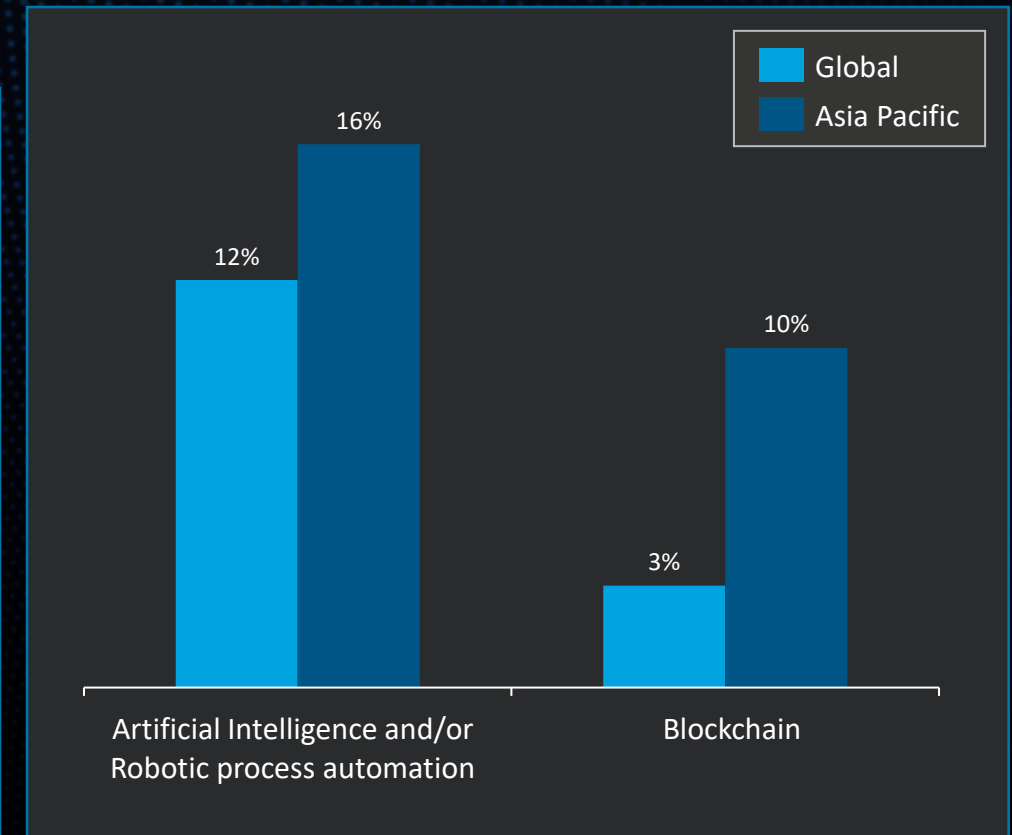
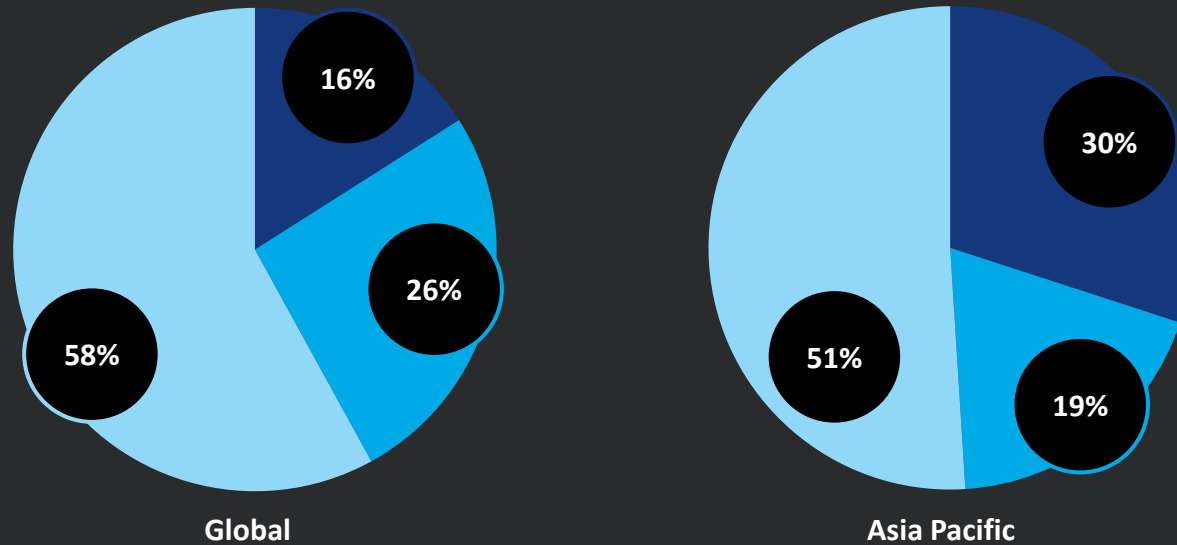
Q: Please select digital technologies that you already implemented or planned to invest?



Technology Implementation

According to the *Deloitte Digital Transformation of Family Office Operations 2024 report*, data analytics is gaining traction among global family offices, particularly in the Asia Pacific region. Almost double percentage of Asia Pacific (30%) using data analytics to drive decision-making in their operations at a large extent when compares to global (16%). Meanwhile 16% of family offices in the Asia Pacific reported that they have now taken-up AI-driven solutions, with a slightly lower adoption rate of only 12% worldwide.

Data analytics in operation-related decision making



Technology Implementation

Among all digital technologies, data analytics and AI are chosen to be implemented or planned to invest by companies with higher levels of digital maturity compared to less mature ones. *Being digital* companies implement or invest significantly in data analytics and AI higher than *digital laggard* companies twice and fivefold respectively. The successful data analytics implementation will pave the foundational capabilities for AI initiatives.

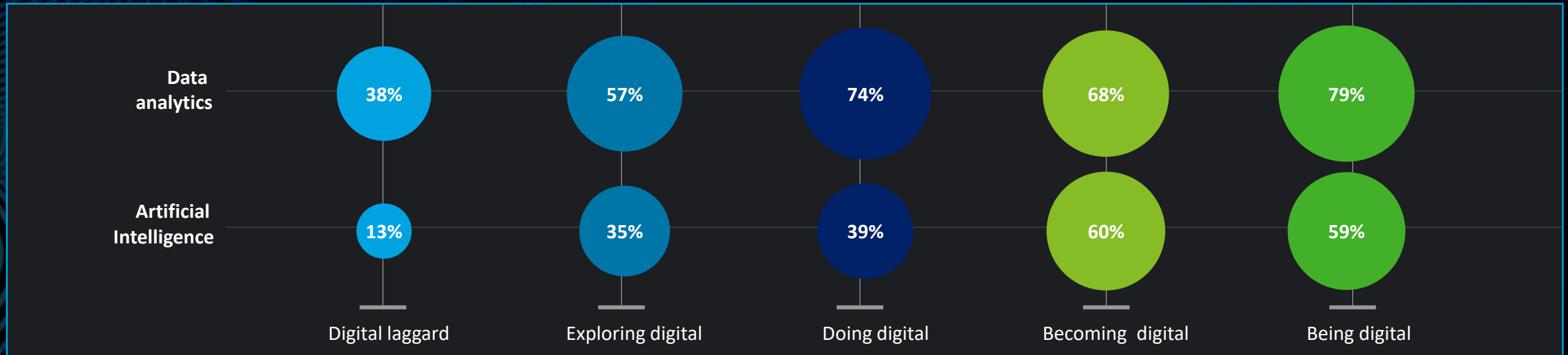


We leverage AI to streamline tasks like data mapping, calculations, data verification, which save us time and enable us to focus on more specialized and valuable tasks.



– Executives of a Thailand sustainability solution provider

Q: Please select digital technologies that you already implemented or planned to invest?



Perception towards Digital Transformation Results

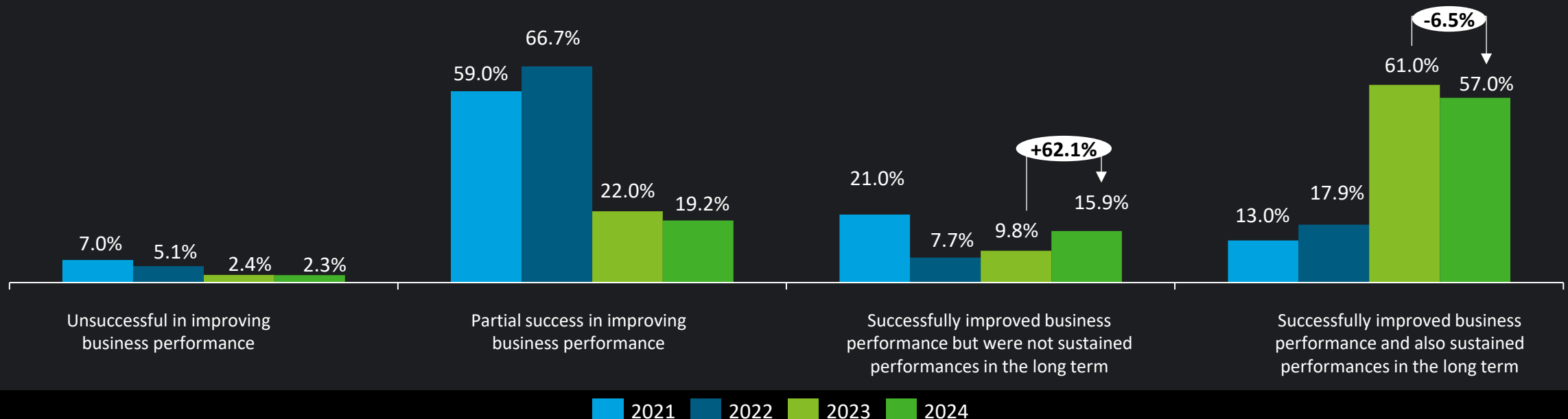
Companies have improved their success rate in digital transformation initiatives as they become more adept at thoughtfully choosing technologies that align with their needs. In line with the digital transformation journey, businesses have learned to set realistic expectations and outcomes for specific initiatives. However, sustaining long-term performance remains a challenge.



We have carefully selected appropriate technologies for our jobs and ensured the valid results.
– Executives of a Thailand sustainability solution provider



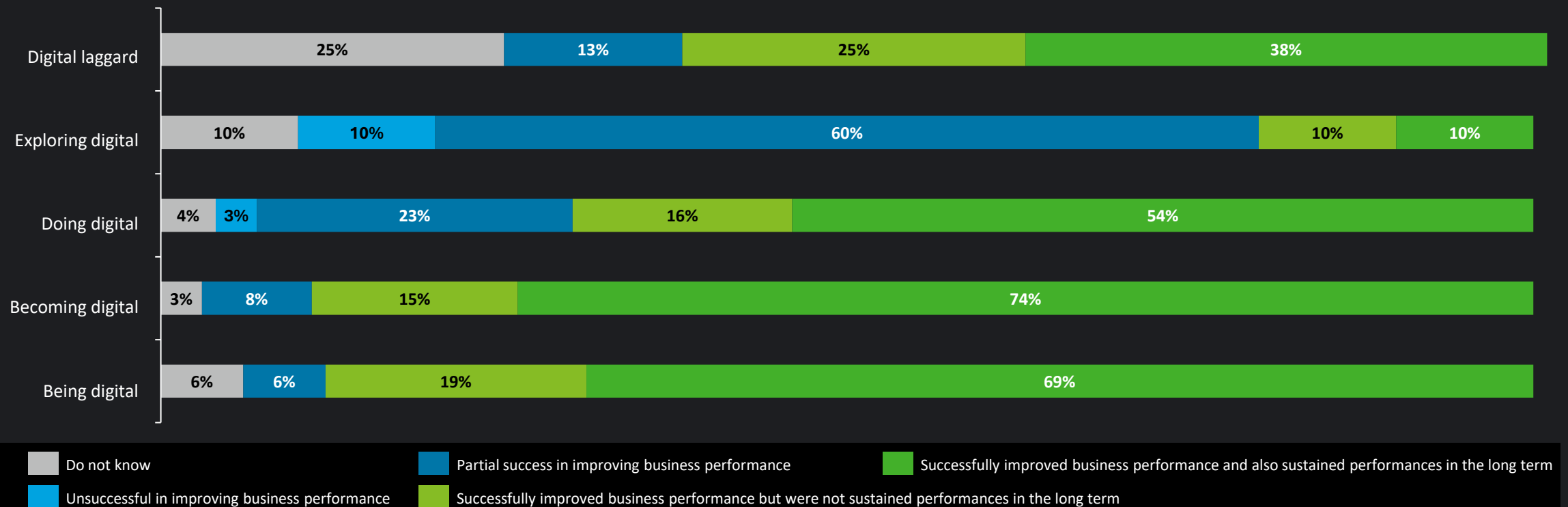
Q: What was the result of your company's digital transformation initiatives?



Perception towards Digital Transformation Results

Unsuccessful efforts to improve business performance were primarily observed among companies that cited as being in the *exploring or doing digital* stages. In contrast, digitally matured companies reported better outcomes from leveraging their experience to select better suited technologies, resulting in more effective implementations and ongoing improvement.

Q: What was the result of your company's digital transformation initiatives?



Successful Results of Digital Transformation

In general, the top two outcomes of digital transformation are increased employee productivity and improved customer experience.

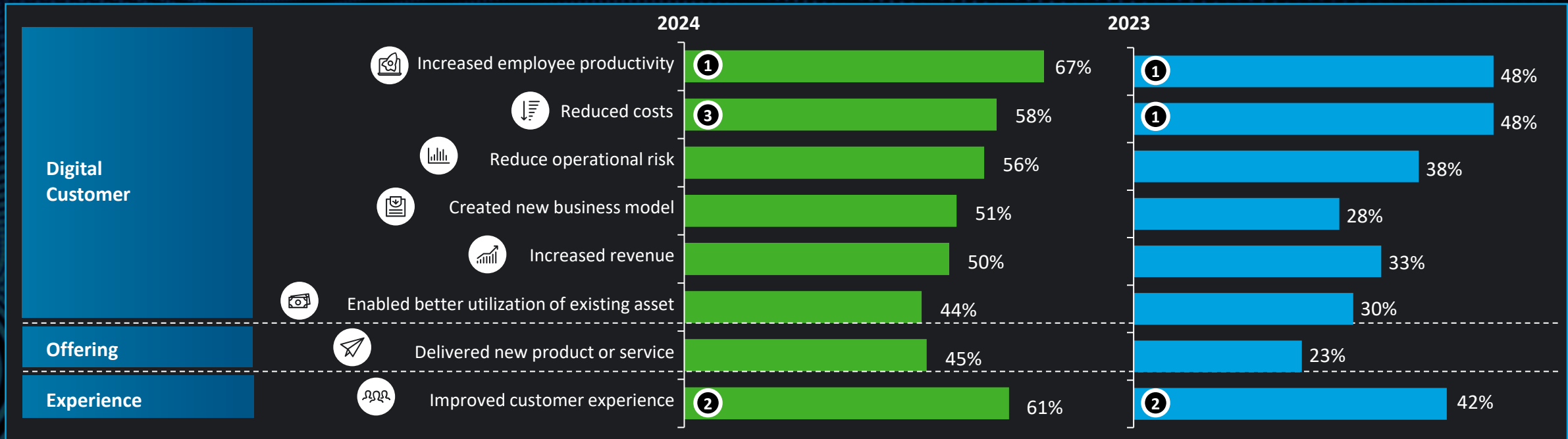


Digital technology enhances employee productivity by enabling us to move our talents to the high-value tasks, while delegating low-value jobs to the technology.

– CEO of a Thailand holding company focused on FSI industry



Q: What were successful results from digital transformation initiatives?



Note: FSI = Financial Services Industry

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Thailand Digital Transformation Survey 2025

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Successful Results of Digital Transformation by Industry

From the executives' perspectives, both ER&I companies and LS&HC companies, which are in capital-intensive industries, leveraged digital technologies to optimize asset utilization more effectively. Consumer companies focus on enhancing customer experience. FSI companies, facing intense competition, focus on reducing cost while striving to maintain and expand their customer base. These targeted digital strategies reflect the unique priorities and challenges of each industry, showcasing the tailored approach needed for successful digital transformation.

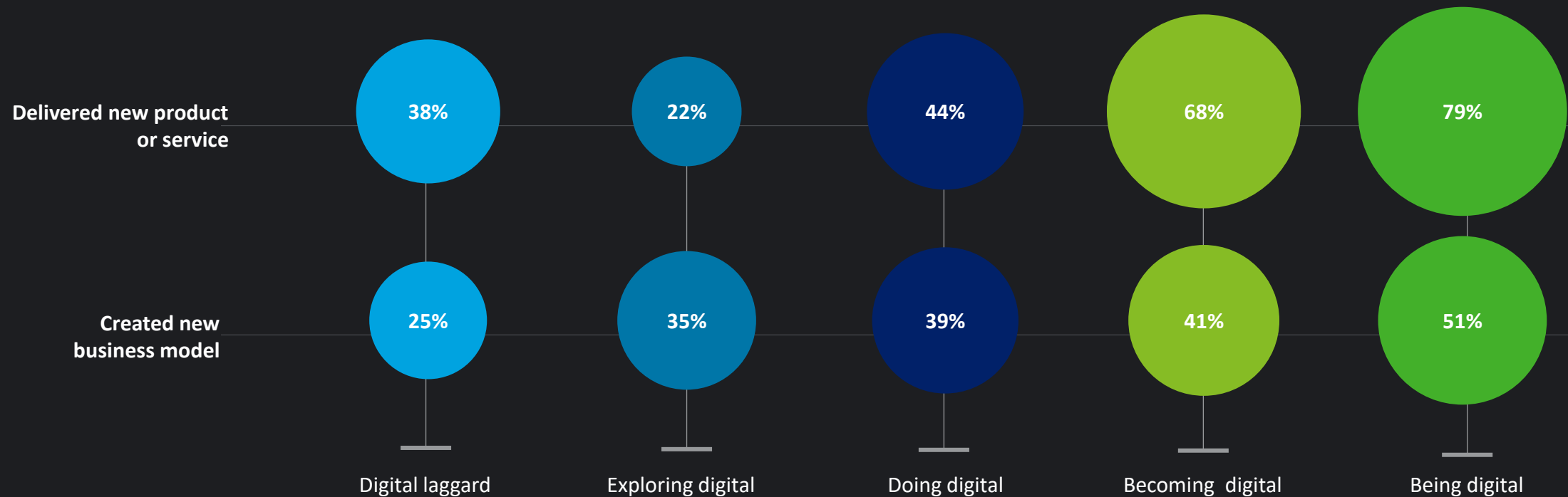
Q: What were successful results from digital transformation initiatives?

Industry	1 st benefit	2 nd benefit	3 rd benefit
Consumer	Increased employee productivity	Improved customer experience	Reduced cost
Energy, Resources & Industrials (ER&I)	Reduce operational risk	Increased employee productivity	Enabled better utilization of existing asset
Financial Services (FSI)	Improved customer experience	Reduced cost	Increased employee productivity
Government & Public Services (GPS)	Increased employee productivity	Improved customer experience	Reduce operational risk
Life Sciences & Health Care (LS&HC)	Increased revenue	Increased employee productivity	Enabled better utilization of existing asset
Technology, Media & Telecommunications (TMT)	Increased employee productivity	Increased revenue	Created new business model

Successful Results of Digital Transformation

As companies progress in their digital maturity, they are increasingly prioritising strategic outcomes, including delivering new products or services and creating new business models through digital transformation initiatives. These outcomes position companies to thrive in a competitive landscape.

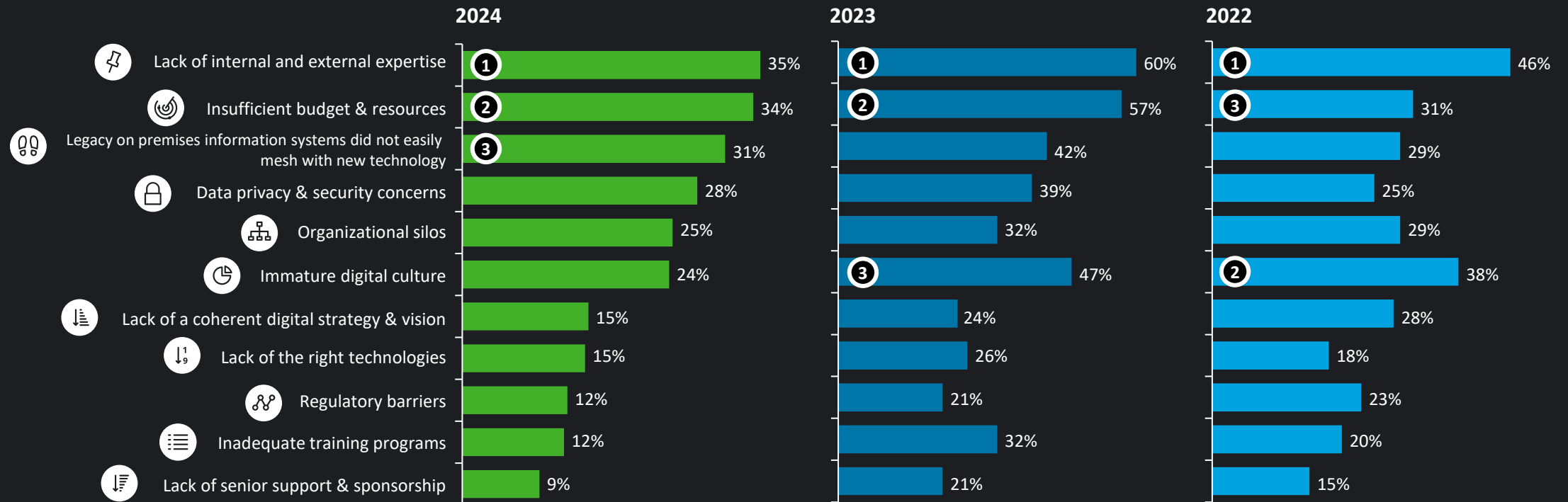
Q: What were successful results from digital transformation initiatives?



Challenges of Digital Transformation

The top two challenges continue to be related to talent and budget, consistent with previous years. In 2024, while companies are more familiar with digital technology, legacy systems have emerged as a prominent issue. This indicates that companies are still seeking to extend and integrate with external systems to enhance their services. Consistently, our *Deloitte Digital Transformation of Family Office Operations 2024 report* also notes that 17% of family office see inadequate investment in technology as a core challenge.

Q: What are challenges to achieve digital transformation implementation in your company?



Challenges of Digital Transformation by Industry

“ We are facing a lack of internal specialists to meet the rapidly growing demand, alongside concerns regarding data privacy from dealing with externals.

– Executives of a Thailand sustainability solution provider

”

Q: What are challenges to achieve digital transformation implementation in your company?

Industry	1 st challenge	2 nd challenge	3 rd challenge
Consumer	● Lack of internal and external expertise	● Insufficient budget & resources	● Legacy on premises information systems did not easily mesh with new technology
Energy, Resources & Industrials (ER&I)	● Insufficient budget & resources	● Lack of internal and external expertise	● Legacy on premises information systems did not easily mesh with new technology
Financial Services (FSI)	● Data privacy & security concerns	● Legacy on premises information systems did not easily mesh with new technology	● Organizational silos
Government & Public Services (GPS)	● Legacy on premises information systems did not easily mesh with new technology	● Insufficient budget & resources	● Insufficient budget & resources
Life Sciences & Health Care (LS&HC)	● Lack of internal and external expertise	● Immature digital culture	● Insufficient budget & resources
Technology, Media & Telecommunications (TMT)	● Insufficient budget & resources	● Organizational silos	● Data privacy & security concerns

Section 2

The State of Generative AI in the Enterprise

Key Findings

Self-assessed High to Very High Expertise with GenAI



Top Benefits from GenAI



Improve efficiency and productivity



Reduce costs



Improve existing products and services

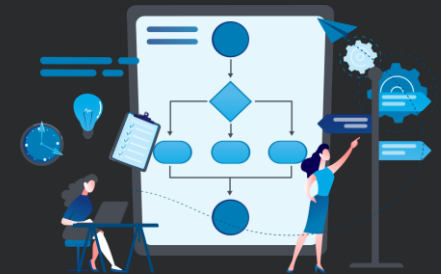
Top Barriers to GenAI Adoption



Lack of technical talent and skills



Lack of an adoption strategy



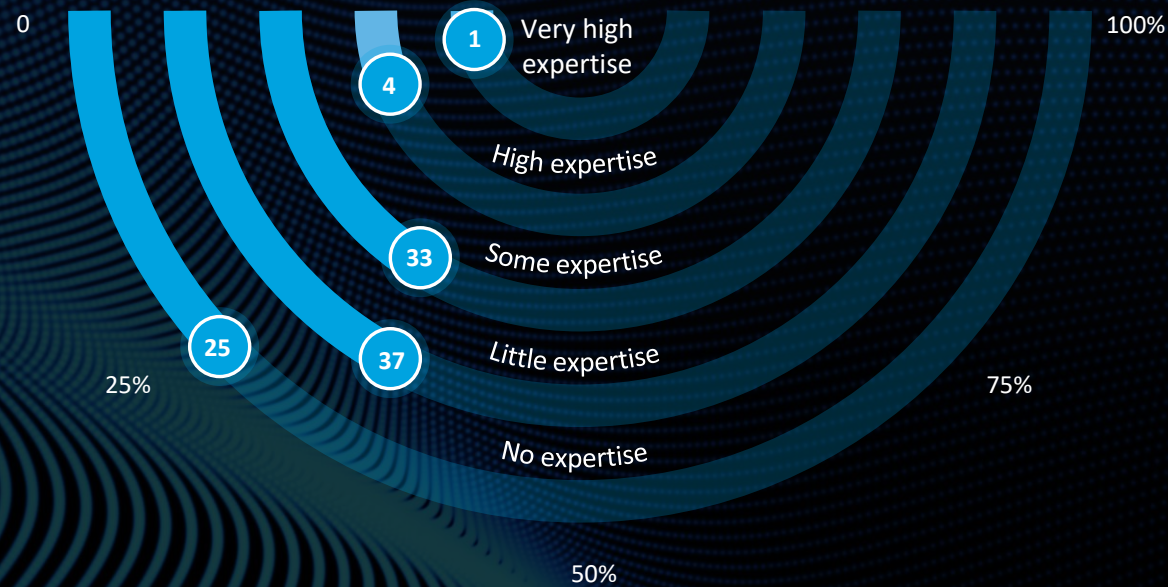
Trouble choosing the right technologies

GenAI Expertise

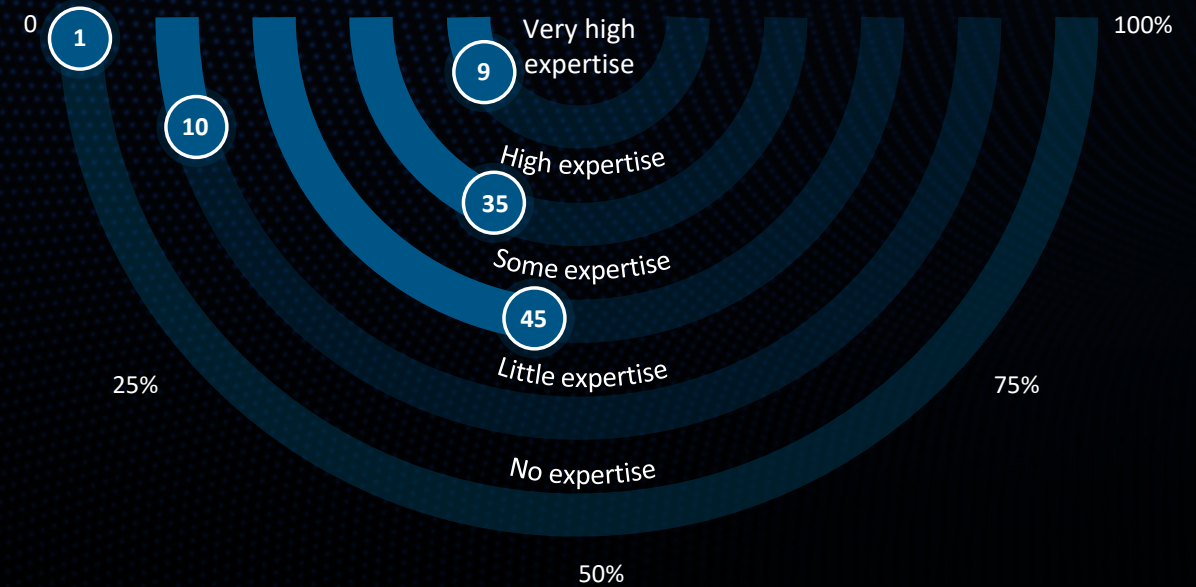
Leaders in Thailand express lower self-assessed expertise in GenAI compared to global leaders, with 95% believing a lack of expertise in GenAI.

Q: How would you assess your organisation's current level of overall expertise regarding GenAI?

Thailand



Global



GenAI Expertise

Companies in TMT indicate the greatest expertise, followed by those in FSI, likely due to their digitalisation, albeit in a divisive manner. This is understandable, given the powerful early use cases for GenAI in areas like social media content creation and report generation. Despite GenAI being a democratised technology, its adoption remains limited, particularly among small companies.

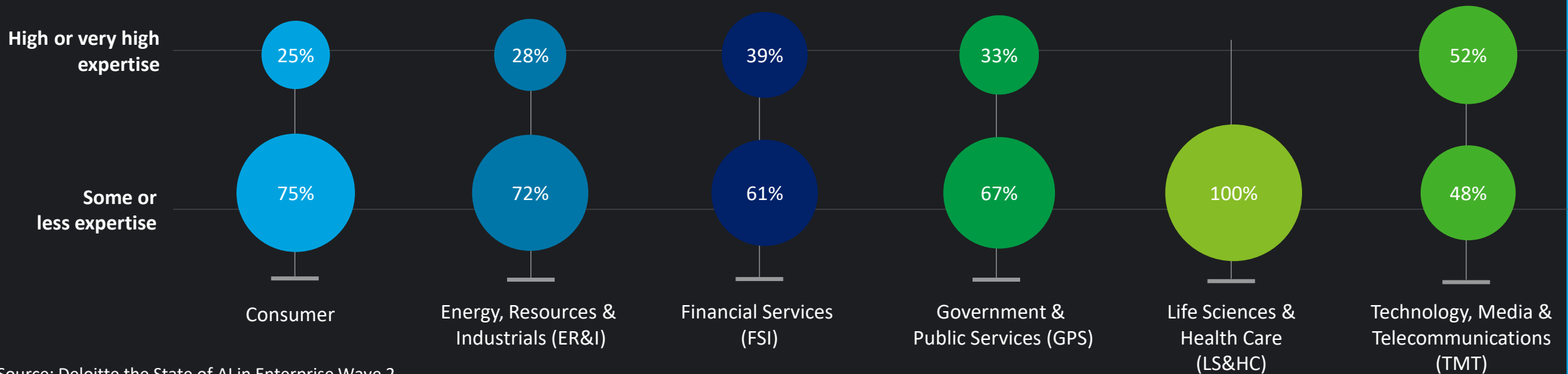


We are still in the early stage when it comes to GenAI. There are numerous use cases and possibilities, but currently, we are only using basic functionalities.



– CEO of a Thailand holding company focused on FSI industry

Q: How would you assess your organisation's current level of overall expertise regarding GenAI?



Source: [Deloitte the State of AI in Enterprise Wave 2](#)

Level of Attention

Perceived attention varies role to role. Across all industries, technology leaders are most interested in GenAI. Top executives, including board of directors, CEOs, and COOs, express pessimistic as just over half believe the attention their companies are paying to GenAI is not enough, arguing that greater attention is necessary. Whereas the *Deloitte State of Generative AI in the Enterprise 2024 report* indicates that on a global scale, most leaders feel they are giving GenAI the right level of attention.

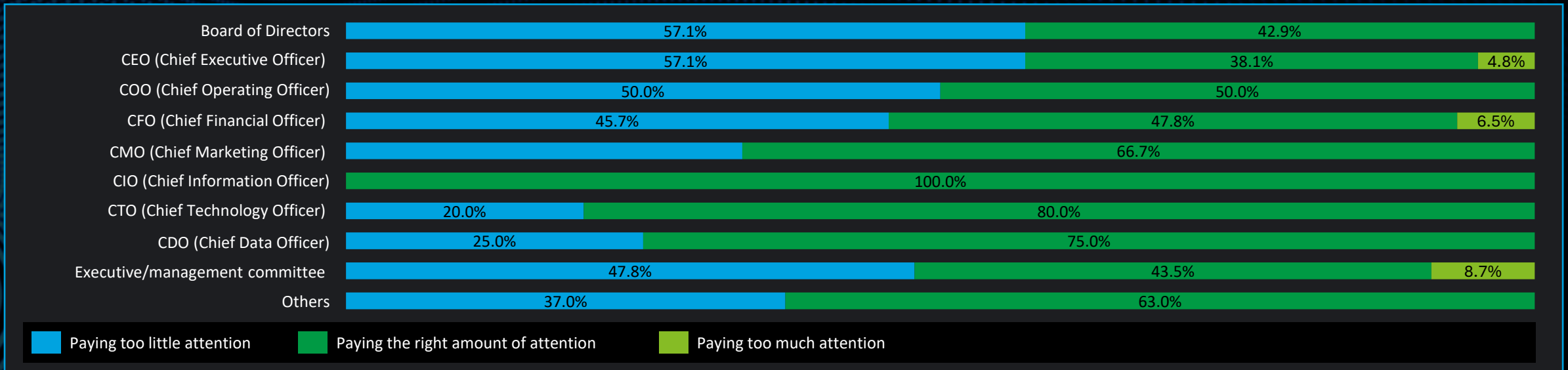


Our digital platform is still under development, so we can't call ourselves experts yet and admit we need to focus more on this.

– **Executives of a Thailand sustainability solution provider**



Q: Please rate your feelings regarding the level of organisation attention being paid to Gen AI.



GenAI Preparedness

On average, talent, risk and governance ranks as the least-ready areas for the adoption of GenAI tools and applications, suggesting an opportunity to enhance workforce development and skills enhancement.

Industries are least prepared on the talent front, but to varying degrees. LS&HC shows the no preparedness compared to FSI at the highest level.

Good governance also leads to greater AI adoption and financial returns. According to the Deloitte's *AI at a crossroads | Building trust as a path to scale*, four high-impact actions stood out that organisation leaders can take now to improve their AI governance.

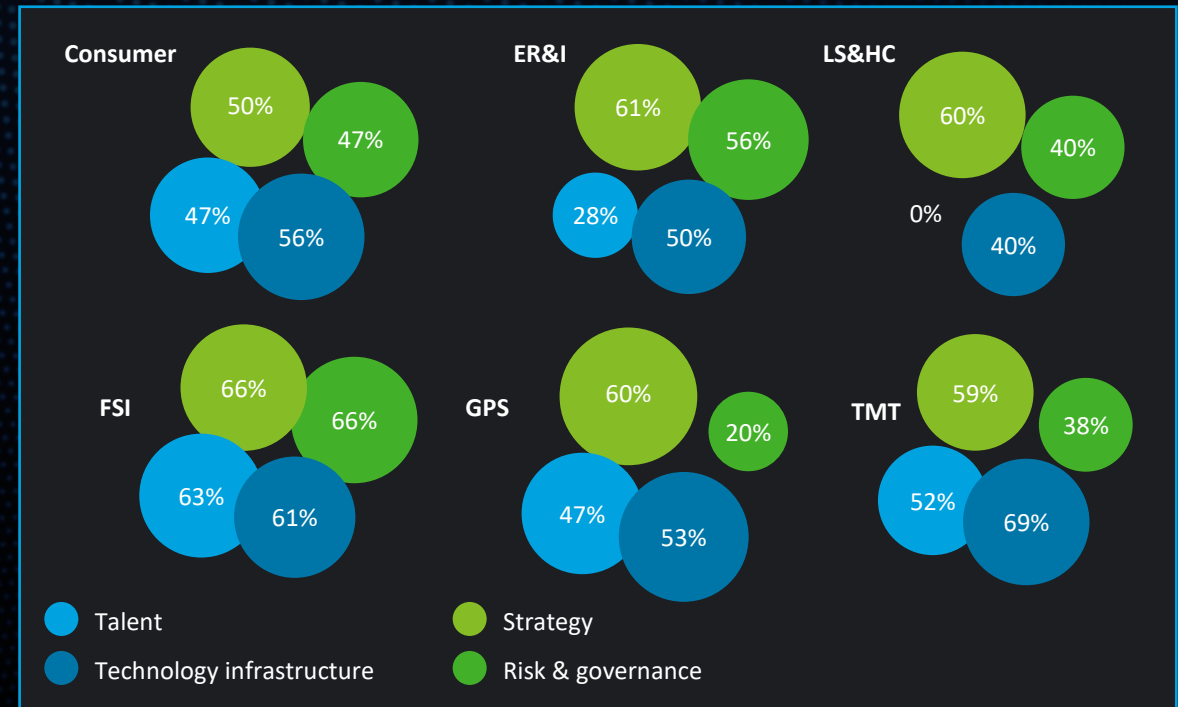
- 1 Prioritise AI governance to realize the returns from AI
- 2 Understand and leverage the broader AI supply chain
- 3 Build risk managers, not risk avoiders
- 4 Communicate across the organisation and ensure AI transformation readiness



We educate our employees on the responsible use of GenAI.
– CEO of a Thailand holding company focused on FSI industry

Note: ER&I = Energy, Resources & Industrials Industry; FSI = Financial Services Industry; GPS = Government & Public Services Industry; LS&HC = Life Sciences & Health Care Industry; TMT = Technology, Media & Telecommunications Industry
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Q: Consider the following areas. For each, rate your organisation's level of preparedness with respect to broadly adopting Gen AI tools / applications? (Percentages represent selection “moderate or highly or very highly prepared.”)



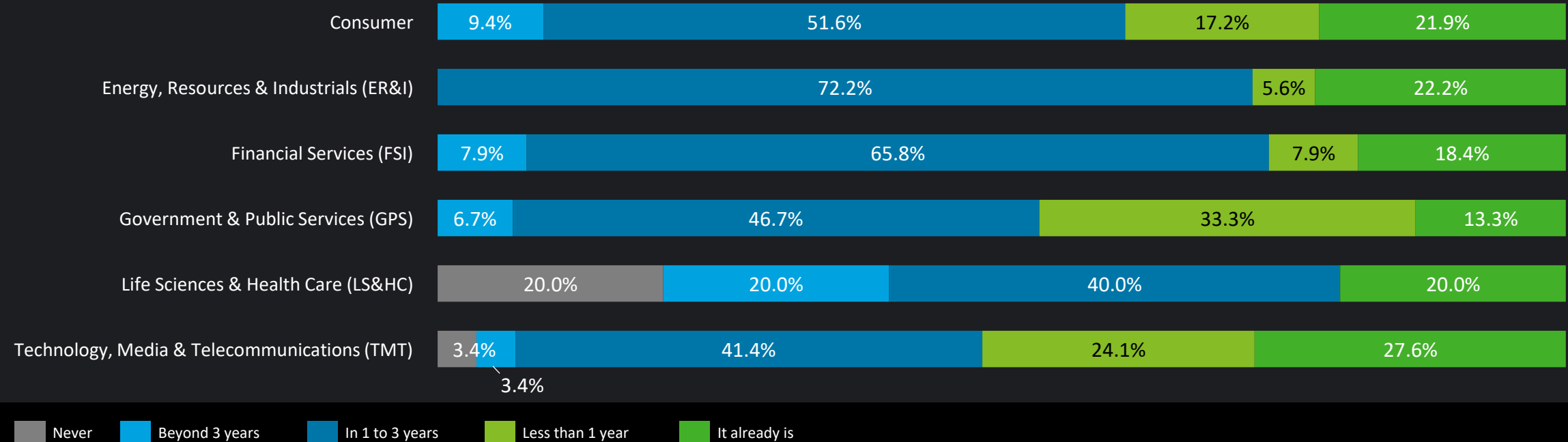
Source: [AI at a crossroads | Building trust as a path to scale](#)



Pace of Organisational Transformation Driven by GenAI

Almost a quarter reported that GenAI had already transformed their business, while approximately nine-tenths of respondents across most industries anticipate GenAI to transform their organisations and industries within the next three years. In the TMT industry, over 50% anticipate this transformation within a year or less. However, some in the LS&HC industry believe that this change will take longer to occur or may never occur at all.

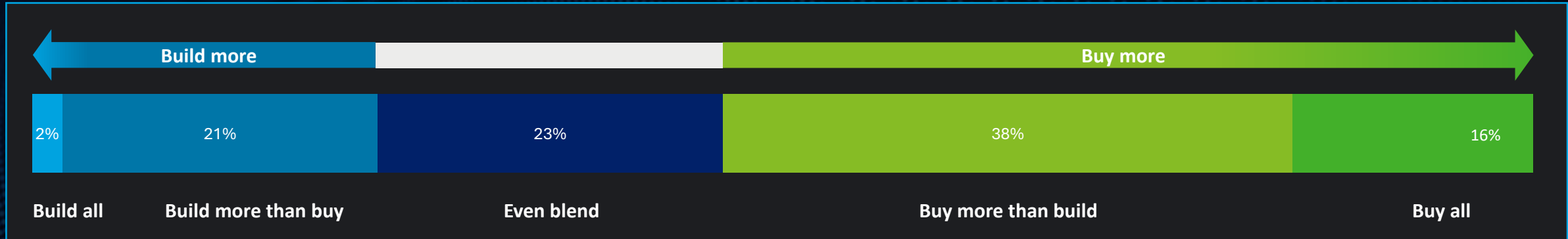
Q: When is Gen AI likely to substantially transform your organisation, if at all?



Build or Buy

On average, companies across industries are more likely to buy GenAI tools / applications from vendors rather than build internally.

Q: For your organisation's Gen AI tools / applications, do you tend to build more internally or buy more from vendors?



Adoption by Function

IT / cybersecurity – along with marketing, sales and customer service – lead adoption, while legal, risk, and compliance lag behind, similar to the global trend. Respondents who reported high or very high levels of expertise in GenAI are significantly more likely to implement it in product development and research and development initiatives.



We focus on our core business first regarding the adoption across functions, then adapt to customer needs, such as addressing concerns about risk and compliance.

– Executives of a Thailand sustainability solution provider



Q: What is your organisation's current adoption level of Gen AI across the following functions? Please answer only the function that apply to you (leave other functions blank)

Industry	① 1 st function	② 2 nd function	③ 3 rd function
Consumer	IT / cybersecurity	Marketing, sales, and customer service	Strategy & operations
Energy, Resources & Industrials (ER&I)	IT / cybersecurity	Strategy & operations	Product development / research & development
Financial Services (FSI)	IT / cybersecurity	Product development / research & development	Strategy & operations
Government & Public Services (GPS)	Product development / research & development	Strategy & operations	Supply chain / manufacturing
Life Sciences & Health Care (LS&HC)	Marketing, sales, and customer service	IT / cybersecurity	Strategy & operations
Technology, Media & Telecommunications (TMT)	IT / cybersecurity	Marketing, sales, and customer service	Product development / research & development

Use Cases

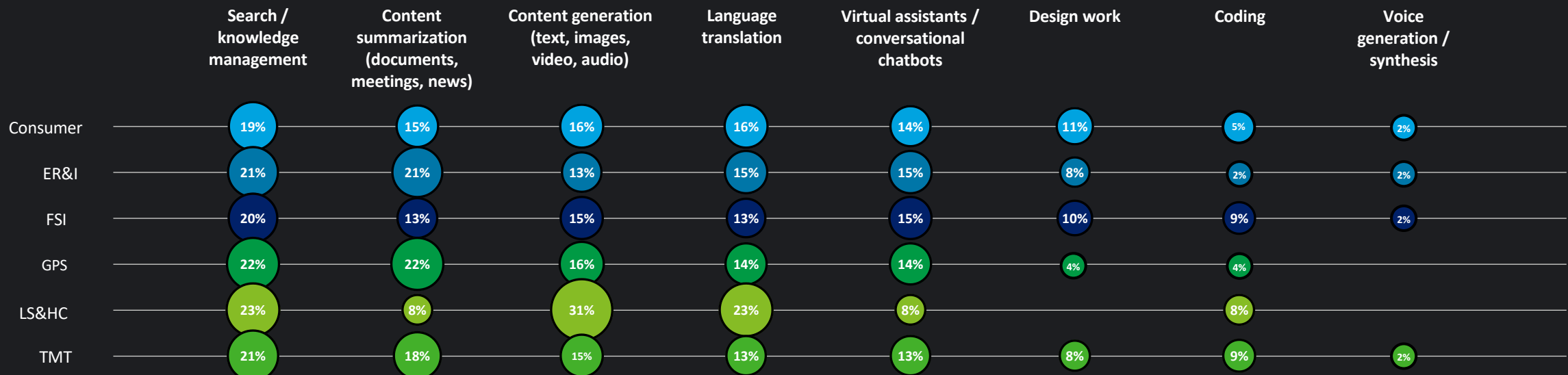
Industries tend to align on the types of GenAI technologies they are using, with greater adoption of search / knowledge management, while coding and voice generation / synthesis ranked among the least used overall.



We utilize GenAI for email suggestions, summarization, and generating simple financial reports for our small business units.
– CEO of a Thailand holding company focused on FSI industry



Q: For which of the following use cases is your organisation currently using Gen AI tools / applications?



Note: ER&I = Energy, Resources & Industrials Industry; FSI = Financial Services Industry; GPS = Government & Public Services Industry; LS&HC = Life Sciences & Health Care Industry; TMT = Technology, Media & Telecommunications Industry

Benefits from GenAI

Currently, companies primarily prioritise their GenAI efforts on enhancing existing processes and capabilities to seize immediate opportunities for value creation. While some expand beyond into transformational improvement – embracing innovation and new ideas – to drive growth and achieve competitive differentiation through capabilities that were previously unattainable. Smaller companies tend to place a greater emphasis on building customer relationships to compete with larger firms. In contrast, large companies often focus on reducing costs associated with high-value assets.



We believe that GenAI will help us develop further technologies, encouraging innovation and growth within our organisation.
 – Executives of a Thailand sustainability solution provider



Q: What are the key benefits you hope to achieve through your Gen AI efforts?

Industry	1 st benefit	2 nd benefit	3 rd benefit
Consumer	Improve efficiency and productivity	Improve existing products and services	Reduce costs
Energy, Resources & Industrials (ER&I)	Improve efficiency and productivity	Reduce costs	Encourage innovation and growth
Financial Services (FSI)	Improve efficiency and productivity	Reduce costs	Uncover new ideas and insights
Government & Public Services (GPS)	Improve efficiency and productivity	Improve existing products and services	Uncover new ideas and insights
Life Sciences & Health Care (LS&HC)	Increase revenue	Reduce costs	Encourage innovation and growth
Technology, Media & Telecommunications (TMT)	Improve efficiency and productivity	Increase speed and / or ease of developing new systems / software	Reduce costs

To What Extent

Only one-third of organisations achieve their expected benefits, with fraud detection and risk management showing the lowest achievement.

Q: To what extent are you achieving those benefits to date



Barriers to GenAI Adoption

Lack of technical talents and skills shared commonly as the primary barrier to adoption across industries. Apart from this, GPS is hindered by a lack of proper computing infrastructure and data, which impedes their progress. Across all industries, the top three key barriers relate to people, processes, and technology—elements that significantly affect overall business operations and change management.



Talents still have inertia in adapting to GenAI.

– CEO of a Thailand holding company focused on FSI industry



Q: What, if anything, has most held your organisation back in developing and deploying Gen AI tools / applications?

Industry	1 st barrier	2 nd barrier	3 rd barrier
Consumer	Lack of technical talent and skills	Lack of an adoption strategy	Trouble choosing the right technologies
Energy, Resources & Industrials (ER&I)	Lack of technical talent and skills	Lack of an adoption strategy	Implementation challenges
Financial Services (FSI)	Lack of technical talent and skills	Trouble choosing the right technologies	Implementation challenges
Government & Public Services (GPS)	Lack of technical talent and skills	Lack of an adoption strategy	Lack of a governance model
Life Sciences & Health Care (LS&HC)	Lack of technical talent and skills	Lack of a governance model	Trouble choosing the right technologies
Technology, Media & Telecommunications (TMT)	Lack of technical talent and skills	Lack of an adoption strategy	Trouble choosing the right technologies

Workforce Strategy

GenAI's potential to supplement human workers is reshaping talent strategies. As noted earlier, the lack of technical talent and skills is a major concern. To adapt to GenAI, over half of the surveyed companies expect to modify their talent strategies within the next year, with nearly one-quarter already implementing changes, moving quicker than global trend. That said, urgency and approaches vary. TMT and consumer industries are leading the way in adaptation within 1 year or now.

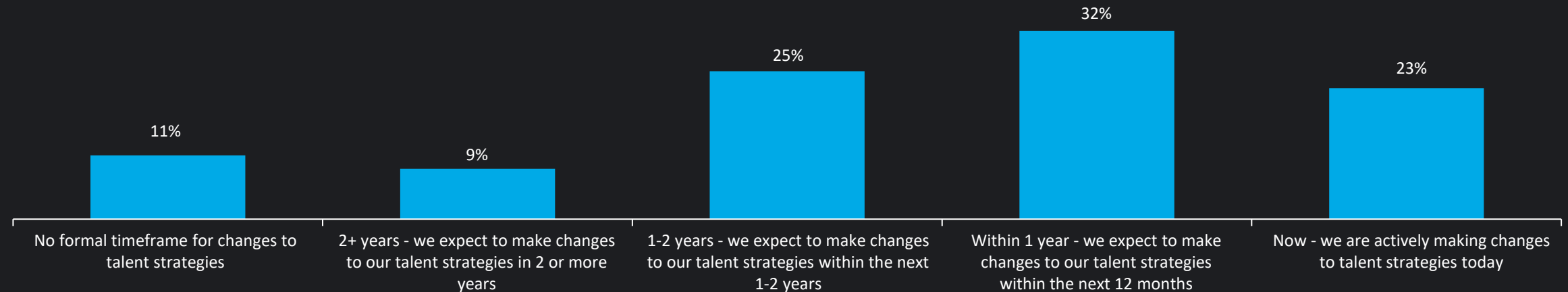


A growth mindset is important for talent to adapt to our ever-evolving world.

– CEO of a Thailand holding company focused on FSI industry



Q: When do you expect to make changes to your talent strategies because of Gen AI?



Source: [Deloitte the State of AI in Enterprise Wave 2](#)

Note: TMT = Technology, Media & Telecommunications Industry; FSI = Financial Services Industry

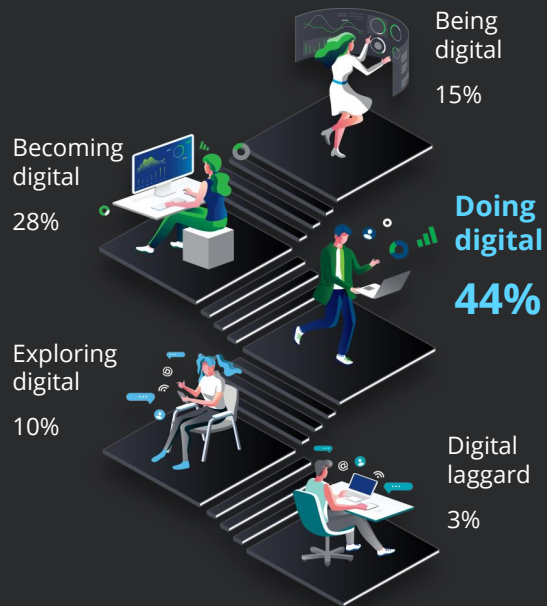
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Thailand Digital Transformation Survey 2025

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Thailand Digital Transformation Survey 2025

In 2025, Thai organisations continue progressing in digital transformation. **Nearly half are in the “Doing Digital” stage.**



Top 3 successful results from digital transformation initiatives



Increased employee productivity



Improved customer experience

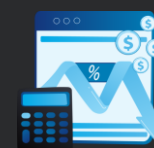


Reduced costs

Reasons why Thai organisations are increasingly aware of GenAI



Improve efficiency and productivity



Reduce costs



Improve existing products and services

Key challenges to achieve digital transformation implementation



Lack of internal and external expertise



Insufficient budget & resources



Legacy on premises information systems did not easily mesh with new technology

Top 3 barriers to GenAI adoption



Lack of technical talent and skills



Lack of an adoption strategy



Trouble choosing the right technologies



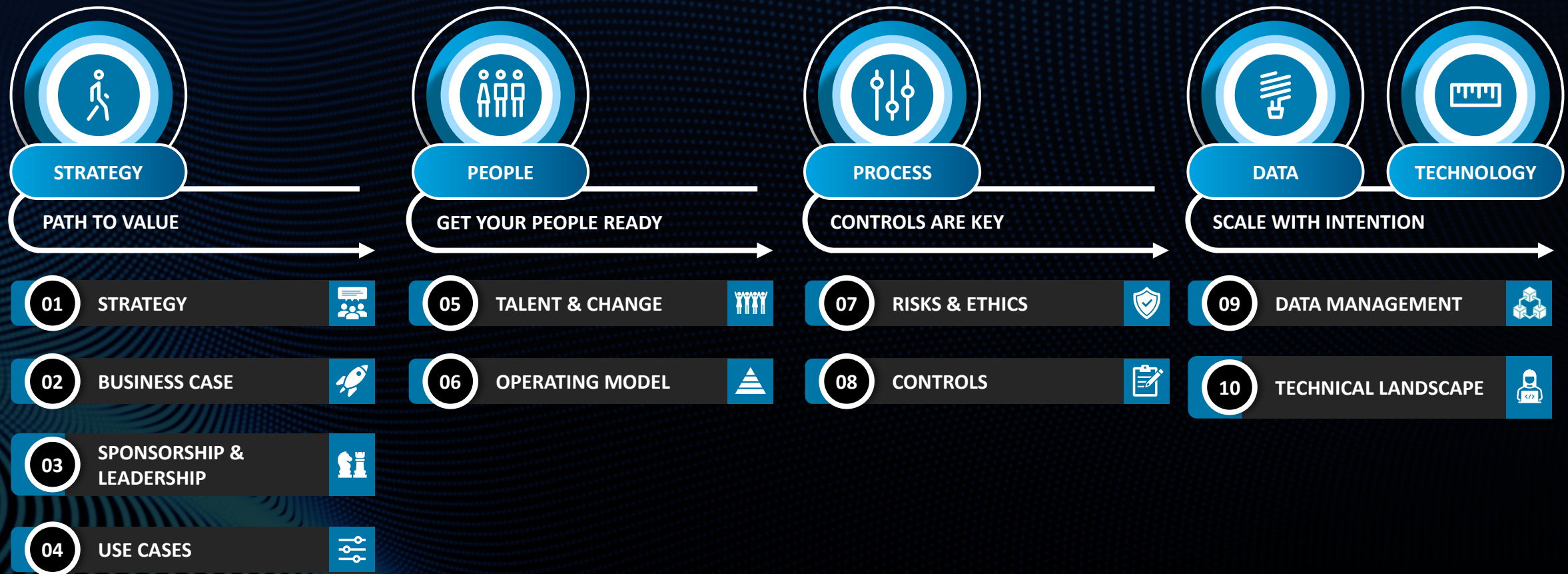
Deloitte's Point of View

10 Key Decision Points for Generative AI Success

A collaboration between Deloitte's Insight Driven Organisation and The AI Institute

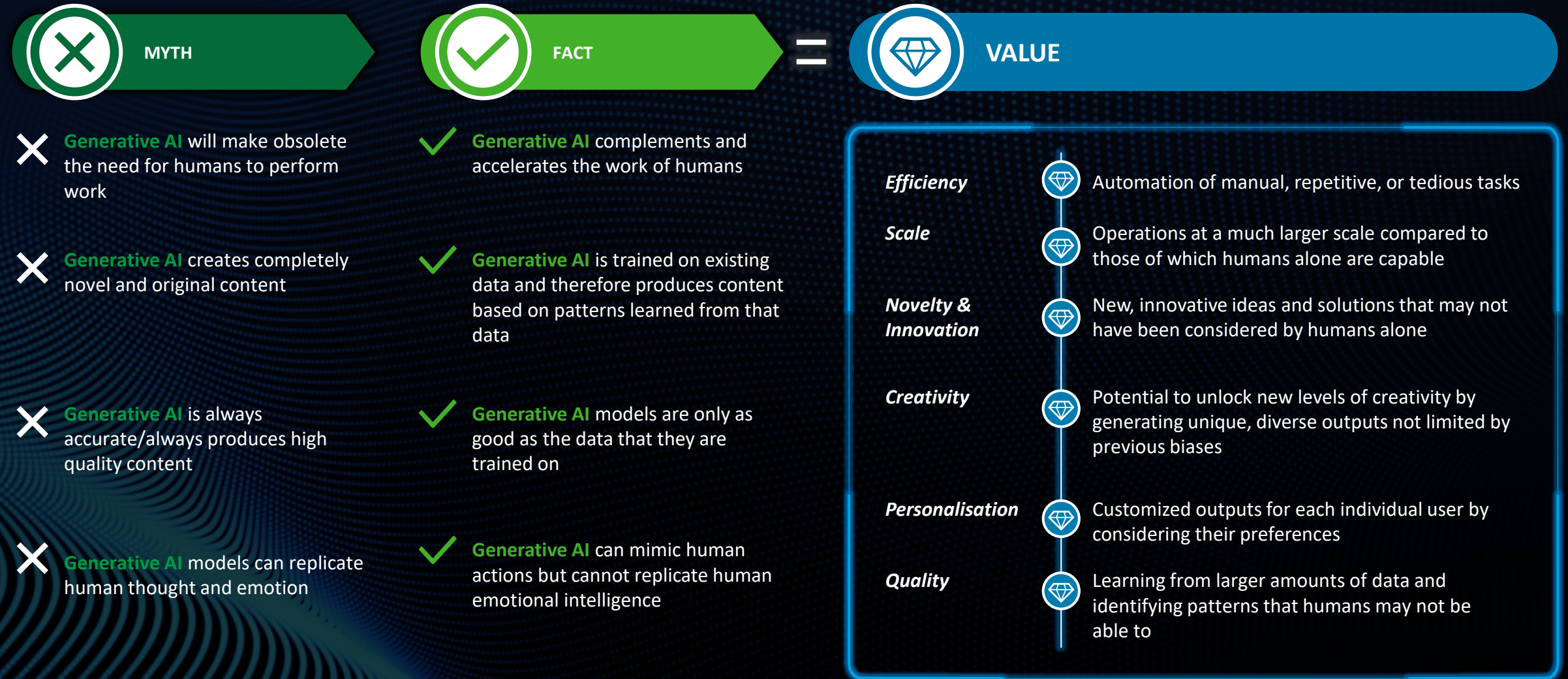
Our market leading Deloitte AI Institute and experience of being at the forefront of use case delivery has taught us the 10 key decision points needed for Generative AI success

We have been using our Insight Driven Organisation proposition to guide our clients through large scale data, analytics and AI transformations for over 10 years. Considerations across **Strategy**, **People**, **Process**, **Data** and **Technology** will be critical for scaling successfully.



There are always myths associated with new technologies, we sort them from the facts

We understand there might be nervousness around starting your journey, but don't let the myths delay you from capitalising on Generative AI's value.





Path to value

What is your Generative AI strategy?

Your strategy should be clear on the value it wants to realise and where – it should be clear on the route you will take to get there through considered, achievable action.

01



What's your route?

1

Greenfield

Creating a **new business/branch** of your business (with **no change to "legacy" business**), developing innovative solutions end to end with GenAI at the core

Main benefit: "sandboxing" GenAI transformation realising maximal impact with minimal disruption

2

Greenfield + Brownfield

Spin up a new business with GenAI at the core whilst performing GenAI use case development in legacy business

Main benefit: you run large scale transformation and initial PoCs which demonstrate early value in tandem

3

Brownfield

Making changes to the existing business either through identifying "pain points" and deciding on use cases to improve them or taking a "scientific" approach to come up with innovative solutions

Main benefit: the flexibility to start small with a pilot, test, demonstrate value and scale where appropriate

How will you enter?

RISK

Will you be a

First Mover

Prioritising innovation and opening a new door of value in your industry

Or

Fast Follower

Leveraging the investment of your peers to uptake proven models and capitalise on commercial costs

VALUE

What's critical?

Business Functions

Critically evaluate which business functions should be prioritised for GenAI incorporation – it's a balance between focusing on high costs solutions as reward could be large, and going for low-cost solutions for ease of implementation but limiting the value they drive

COST
TO
IMPLEMENT

VS

VALUE
OF
RETURN

What's your value play?

We know the opportunity for GenAI value add is extensive, but tapping into all areas, all at once will overwhelm your GenAI strategy and saturate the potential value each initiative could realise. **Be clear about what you are playing for to bring clarity to how you are going to play.**

Efficiency, Scale, Novelty & Innovation, Creativity, Personalisation, Quality

What is your Generative AI business case?

Considerations should be made across the below 6 areas.

02



Economic Viability

Factors affecting GenAI investment:

1. **Run costs for training models** – impacted by open vs closed source, types of modalities, bespoke or general models
2. **Scaling** – the size of the compute required should be considered at the use case and enterprise level: if training cost per chat is low but you transform a whole function, then costs will quickly climb up
3. **Time** – if you want to be a first mover, the costs of innovative solutions is high; or you could be a fast follower and wait for costs to flatten as the technology develops
4. **Technology investment** – including changes to existing infrastructure, use case development, talent acquisition and op model changes

Technology Viability

What is the ease of implementation? Would a large amount of non-GenAI tech changes be required pre GenAI, or can you jump straight in to build on what you have?

Privacy

Some technologies require the transfer of your data in order to produce outputs, meaning your data could be crossing borders – is this in accordance with data privacy laws and with your company's policies?

Risk Appetite

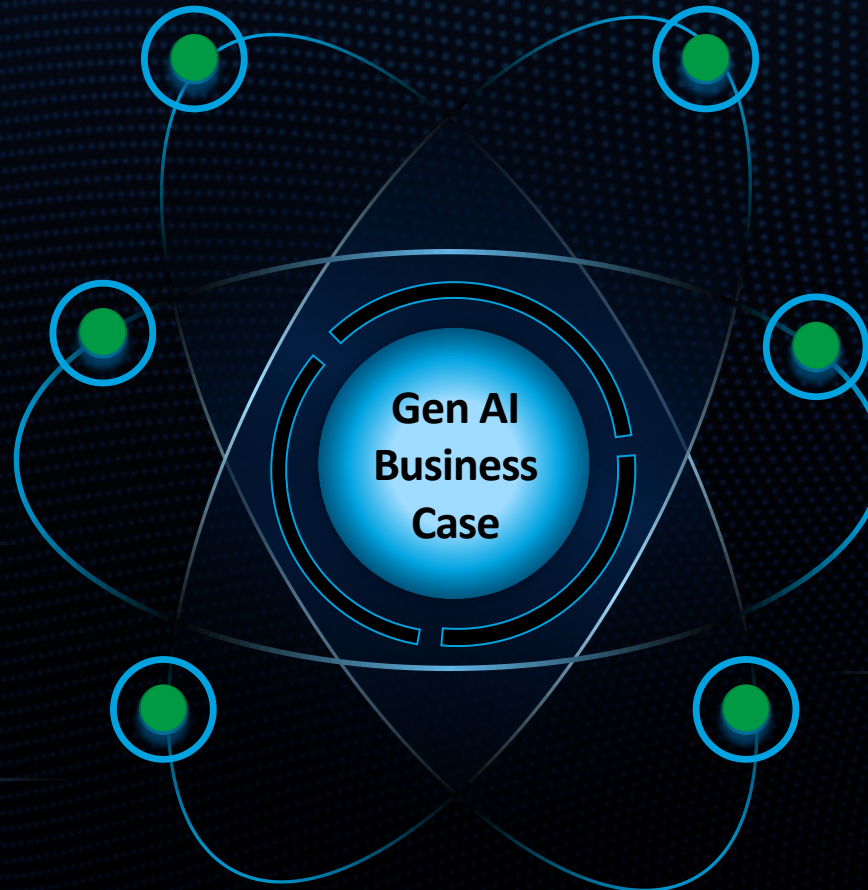
What is the "buffer zone" for investment return and does your proposed strategy fall inside it? Considering the number of risks GenAI poses, have you included enough investment (both in effort and money) in your strategy for risk controls and monitoring?

Capacity Required

Would building your GenAI solutions need sandboxing and then incorporation into the existing function (meaning extra resources)? Or do you have the capacity and skills to implement side of desk in BAU? Do you the users of the solutions have time to do the required training to ensure solution value is realised? How will all of this affects BAU performance?

Competitive Advantage

Will the strategy deliver an advantage over your competitors? If not, is the value it will return significant enough despite the lack of advantage? If you choose not to move with your competitors, this may have further negative repercussions as technology development builds on the existing solutions



Who are the key players that will inspire and drive this transformation?

03



A cultural shift is required among business leaders to redesign business practices and incorporate GenAI across all aspects of business operations.

Sponsors

Drive the GenAI agenda providing strategic support with an understanding of the AI ecosystem.

It is no secret that for *impactful change to occur it must come from the top*, which is why board and CEO level sponsorship for Generative AI transformation programmes and initiatives is *absolutely critical*, especially when its application is not yet fully understood across an organisation.

In many organisations, the ownership of the AI strategy and agenda can vary. It often falls under senior leadership, such as the Chief Technology Officer (CTO), Chief Data Officer (CDO), Chief Information Officer (CIO), or *Chief AI Officer (CAIO)*.

Champions

Actively advocate for GenAI adoption and provide domain expertise to prioritise use cases. Drive conversations to integrate GenAI across the business.

CDO: Chief Data Officer

Focused on data and availability

CTO: Chief Technology Officer

Focused on technology

CAIO: Chief AI Officer

Orchestrators

Lead development, provide support, track and manage activity and coordinate efforts to align stakeholders to ensure cohesive GenAI strategy.

Executors

Directly implement specific AI related projects and initiatives. Contribute to research, PoCs and GTM pursuits.

When GenAI sits in the CAIO's world, it *bridges the gap between the CDO and CTO bringing the value of both simultaneously and in equal measure.*



Every forward-thinking organisation should have a Chief AI Officer.

– Sulabh Soral, Chief AI Officer, Deloitte

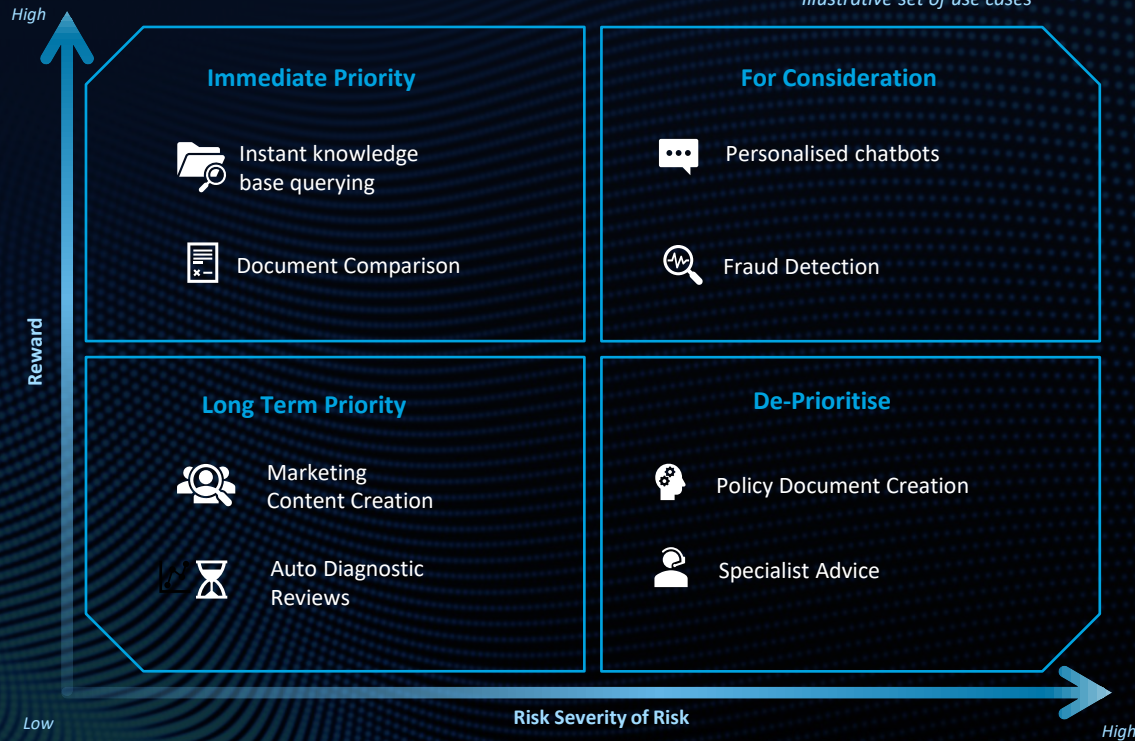


Which use cases or fields of play should you prioritise?

Generative AI is vulnerable to bias and errors; therefore, it is best to use a Risk vs Reward approach when prioritising use cases.

04

Illustrative set of use cases



Considerations:

1. Is GenAI the right tool to solve your business challenge? Or can it be tackled using another data / analytics / AI solution?
2. What is the **financial viability** (e.g., investment and talent pool availability)?
3. What is the **technical viability** considering your existing tech stack?

Filling the 2x2 matrix with use cases which balance risk and reward is a great starting point

Priority	Types of Risks	Risk	Reward	Mitigation strategy
Immediate Priority: strong incentive from business to develop these use cases, with fewer risks and hurdles to overcome	<ul style="list-style-type: none"> Hallucinations (lack of truth function) 	<div>High</div> <div>Medium</div> <div>Low</div>	<div>High</div> <div>Medium</div> <div>Low</div>	<ul style="list-style-type: none"> Ensure there is a 'human-in-the-loop' (a subject matter expert) to train and validate the AI system effectively Clear guidelines and policies defined to ensure adherence
For Consideration: high demand for use cases, but also high risk to customers / employees which will slow down progress	<ul style="list-style-type: none"> Biased outputs Sophisticated phishing / fraud 	<div>High</div> <div>Medium</div> <div>Low</div>	<div>High</div> <div>Medium</div> <div>Low</div>	<ul style="list-style-type: none"> Conduct 'chauffeured' model validation to ensure biased outputs are limited Create a customised scorecard for model results and display key security KPIs
Long Term Priority: lower motivation to develop technology but also lower risk impact to business in case of technology malfunction	<ul style="list-style-type: none"> Ethical use IP protection 	<div>High</div> <div>Medium</div> <div>Low</div>	<div>High</div> <div>Medium</div> <div>Low</div>	<ul style="list-style-type: none"> Set up AI ethics framework and ensure comprehensive training has been conducted by all relevant persons in organisation Define clear governance / reporting lines to manage risks
De-Prioritise: Complex use cases (e.g., providing niche advice) with high-risk impact to customers / business	<ul style="list-style-type: none"> Biased outputs Data privacy Malicious behaviour 	<div>High</div> <div>Medium</div> <div>Low</div>	<div>High</div> <div>Medium</div> <div>Low</div>	<ul style="list-style-type: none"> Sensitive data should be anonymised and encrypted Conduct algorithmic impact assessments to ensure privacy by design and adherence to GDPR



Get your people ready

What skillsets do you need to deliver GenAI solutions?

05



“What skills do I need for GenAI?” is the question on everyone’s lips – to cut through the complexity we have summarised the skills required into 4 key roles, all of which sit under the traditional data science bucket.

Historically the role of “Data Scientist” has been a catch all term that can mean everything and nothing all at the same time. This makes it an extremely difficult role to hire into / upskill, as it's not clear what is *actually* required. If you want to get ahead of the curve with GenAI delivery, we suggest the below breakdown.

Data Scientist



ML Engineer

As an ML Engineer you are probably ex “Data Science”. You need deep industry / business domain understanding to build models that will drive the required outputs. Through this knowledge we support in the training of models, build pipeline and refine models where required.



Cloud AI Engineer

As a Cloud AI Engineer you probably have ML Engineer experience but also some software expertise. Your job is to safely deploy and scale GenAI solutions, working with technologies like APIs. You will work closely with Prompt engineers to monitor and track the impacts of your scaling to ensure GenAI outputs are correct.



ML Ops

Once Cloud AI Engineers have finished their deployment and industrialisation, your job in ML Ops is to monitor, run and improve the solutions, implementing the required controls. You will spend your time fixing bugs and ensuring compatibility with the other technologies.



Prompt Engineer

The AI Prompt Engineer plays a pivotal role in developing and refining AI language models, ensuring they generate accurate, coherent, and contextually relevant responses. You will collaborate closely with cross-functional teams to shape the next generation of AI-powered applications.

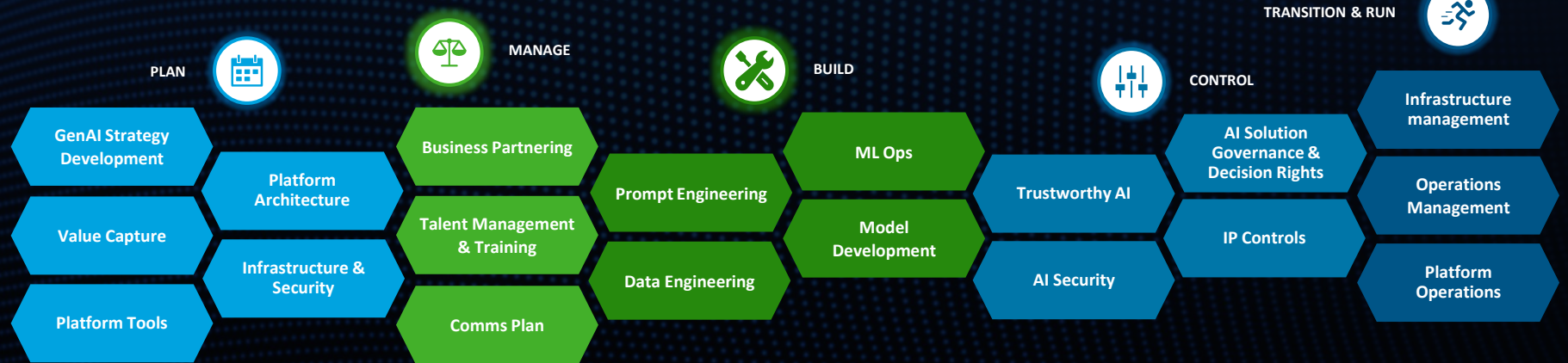
How will your operating model need to evolve?

Your operating model should drive the safe and consistent delivery of GenAI solutions, instilling confidence in the decisions made from the insight generated.

06

Capabilities to successfully scale GenAI

To unlock the potential of Generative AI and derive meaningful value, we must consider additional capabilities and enhance the existing ones to effectively embed guardrails and industrialise AI solutions.



'Centralised' Model

Business leverages GenAI solutions and feeds requirement to central hub



Central function delivers GenAI use cases

- Consistency and centralised control of GenAI strategy and build activity
- Greater collaboration between GenAI practioners
- Lacks flexibility in responding to business needs
- Disconnected from end users of AI solutions

'Centre of Excellence' Model

Practitioners embedded in functions, delivering use cases



Central function sets standards, introduces best practices and manages training

- Increased adherence to standards and best practices
- Greater understanding of business requirements
- Increased knowledge sharing and upskilling
- Requires greater coordination and community effort

'Dispersed' Model

Functions / BU deliver use cases with no central coordination



- GenAI practitioners acquire deep domain knowledge
- Business functions prioritise initiatives locally
- Siloed delivery due to lack of coordination
- Lack of consistency
- Poor knowledge sharing

Organising these capabilities for effective delivery

Embedding digital ethics in the production process improves AI robustness, accessibility, productivity, deployment and operations, ensuring risks are methodically addressed as the organisation matures.

What are the partnership options for GenAI delivery?

If you are low on BAU capacity and / or have an immature GenAI workforce, partnering with a GenAI delivery organisation is a safe and sturdy option for accelerating your use case delivery.

06



Partner collaboration



Go it alone

Offering	Description	Example Ask	Benefits	Considerations
Foundry Service	A flexible and fluid capacity model for the delivery of small scale GenAI projects and enhancements; can scale project talent resources up and down with demand	"We want to increase our capacity to build GenAI solutions whilst improving our processes. This is to have an increased level of consistency and achieve a higher retention of talent and lower costs."	<ul style="list-style-type: none"> Scale project resources up and down based on demand while minimizing impact on BAU operations Access to mature capabilities to augment internal capabilities Reduced start-up costs and overhead (e.g., costs related to talent acquisition, headcount burden) 	<ul style="list-style-type: none"> Not recommended for large scale transformations as costs can increase beyond practicality – best suited for many small projects and enhancements requiring skilled resources
GenAI-as-a Service (GenAI-A-A-S)	Meet your organisation's ongoing GenAI needs through strategically managing and enhancing technology applications, digital, cloud and infrastructure	"We want to improve our GenAI capability with fewer suppliers but produce better insights as well as improve solution quality, business satisfaction and demand management capabilities."	<ul style="list-style-type: none"> Converts a build and maintenance operation into a service operation Drives sustained business value on a proactive basis Builds solutions quickly, cost-effectively and efficiently accelerating delivery 	<ul style="list-style-type: none"> GenAI as a Service sits separately to your BAU meaning upskilling of existing employees is unlikely and each time you want to build a GenAI solution (without hiring or upskilling) you will need GenAI-A-A-S
GenAI Advisory	SMEs in your industry collaborate with GenAI experts and as a team form a deep understanding of your unique needs before providing recommendations for your GenAI journey	"We would like a partner to help us with the design of a GenAI solution including key deliverables required, considerations and a plan for delivery."	<ul style="list-style-type: none"> Access to expertise that's not available in-house Obtain a strategy that is tailored to your objectives in an accelerated timeframe Lower in cost than implementation services 	<ul style="list-style-type: none"> Implementation of proposed solution can be challenging if details / expansion is needed without advisory team engaged
Solo Journey	Leverage existing talent and capability in your business to scope, plan, develop, deploy and manage in-house GenAI solutions without external interaction	"We want to launch a team that can end to end deliver our GenAI solution – we have the time, talent and intention to deliver this without partnership to keep our external spend at a minimum."	<ul style="list-style-type: none"> No external partnership costs Full ownership and control of outcomes and timeframes Opportunity for existing staff to showcase capability and have pride in solo accomplishment 	<ul style="list-style-type: none"> Unforeseen expertise requirements that are not available can hinder progress



Controls are key

Why do I need to make room for risk and ethics in my GenAI strategy?

A once “must have” has now becomes a contributing factor in determining the value your GenAI initiatives can unlock.

07

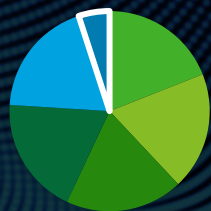


When defining a technology strategy, often risk and regulation are given a smaller share of the pie than their sales, market ownership and innovation counterparts because they are seen as “box ticking” components rather than “value generating” components.

GENAI DEMANDS A SHIFT TO THIS BELIEF. RISK AND REGULATION ARE NO LONGER AN EXERCISE IN TECHNOLOGY MANAGEMENT – THEY ARE STRATEGIC LEVERS TO PULL ON IF YOU WANT TO REALISE MAXIMAL VALUE IN THE MINIMAL TIME.

A GenAI strategy with regulation and risk controls considered in equal measure to other strategic levers deploys trustworthy, ethical and fair AI and embeds governance and trust at all stages. This allows you to take a **strategical decision-making approach to compliance, preventing regulation from stifling innovation and value realisation.**

Traditional Strategic Priorities



- Manage risk and compliance
- Increase Revenue
- Increase Employee Satisfaction
- Gain Market Position
- Innovation
- Diversify Revenue Streams

Post Generative AI Revolution Priorities



- Manage risk and compliance
- Increase Revenue
- Increase Employee Satisfaction
- Gain Market Position
- Innovation
- Diversify Revenue Streams



A new competitive advantage unlocked

Just as your organisation demonstrates that it is a responsible business by including ESG within its strategy, investing in adequate controls and governance will be essential for brand reputation as society adjusts to this new technology. With societal fear of machines and an increasing media focus it means that the stigma of regulatory breeches or “GenAI gone wrong” will be magnified. Therefore, controls and governance should not just be considered as ethically the right thing to do, but strategically and competitively important.

What are the key risks and how can you proactively mitigate them?

Controls and managing risk can no longer be an afterthought; risks and their corresponding mitigations should be planned into delivery in the same way as working groups, entry / exits gates and resource deployment.

08

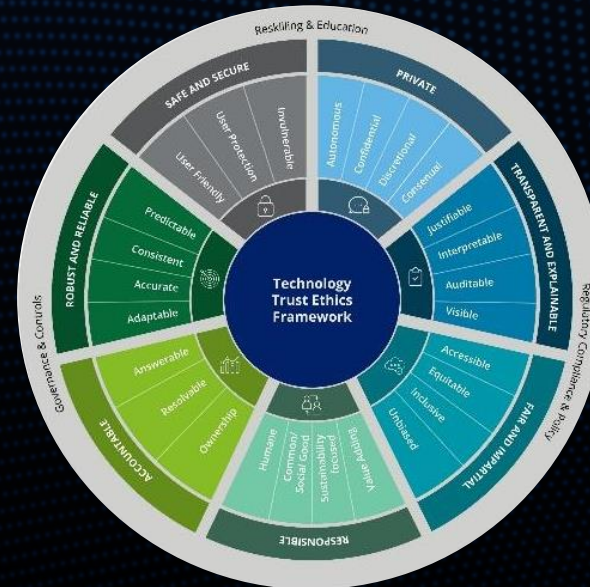


WHAT ARE THE RISKS?

- Inaccuracy ("hallucination")
- Explainability
- Bias
- Confidentiality & Privacy
- IP Protection, Copyright, & Infringement
- Prompt injection (targeted malicious prompts designed to mislead the AI model)
- Misuse
- Environmental
- Regulatory Landscape



THE FRAMEWORK TO MITIGATE



CONTROLS ACROSS DELIVERY



The regulations around AI and ML are rapidly evolving: the proposed EU AI Act, the UK National AI strategy and the Data Protection and Digital Information Bill, just to name a few.

Our Trustworthy AI Framework provides a comprehensive methodology for assessing risk and proactively implementing the required controls, whether they be preventative, detective or for training and creating awareness.

We have developed a use case development framework to ensure all the required controls and governance are included throughout the development lifecycle.



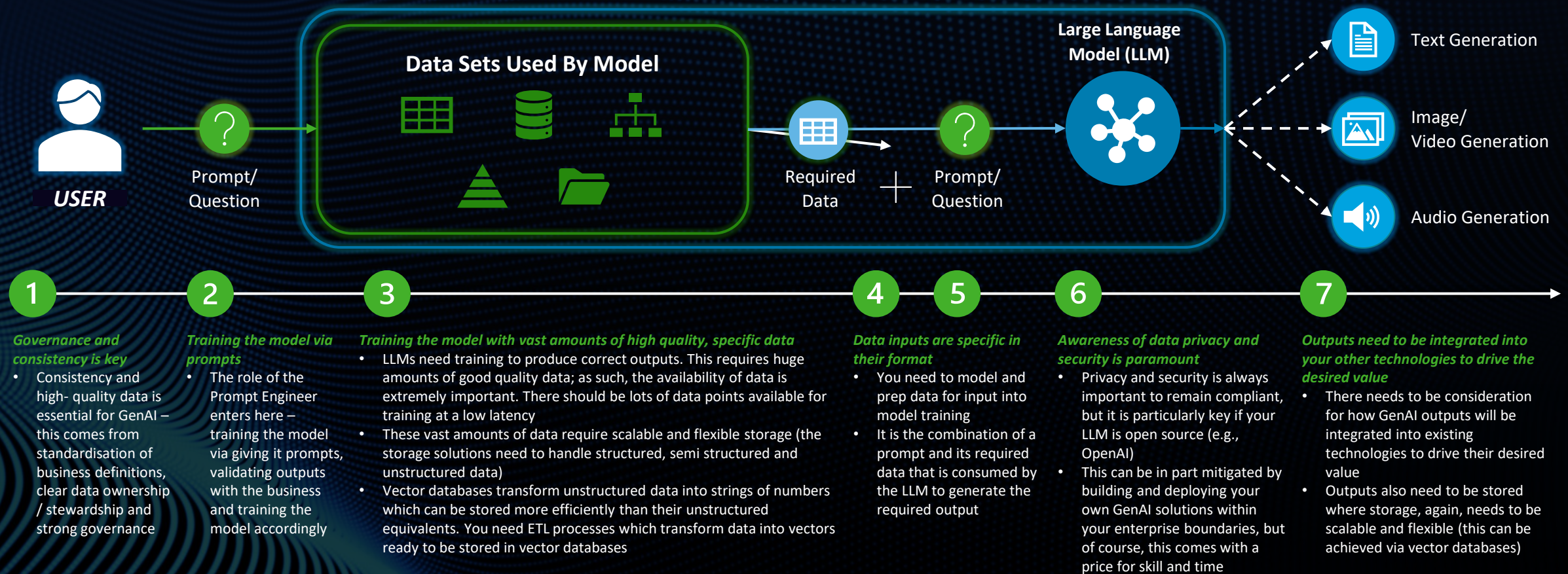
Get started & realise value

Data is a determining factor for your Generative AI success

In many ways the data management capabilities you have built for traditional analytics are required for GenAI, but key areas to dial up are quality, governance, availability and ownership clarity.

09

The ideal GenAI solution consolidates data in near real time and then governs / secures that data in a consistent/regulatory compliant way. To understand the requirements, consider the lifecycle of data in a GenAI solution.





**Get started &
realise value**

Get your Generative AI stack right the first time

Although it has always been pivotal to make decisions on platforms and your technology stack based on use cases, Generative AI is less forgiving than traditional analytics.

10



Type of Tech Stack	Client Context	Next Steps for Solution
Traditional Data & Analytics Stack 1	“We’ve put prior investment into our platforms and data architecture without a use case led approach but would now like to start building on it to drive value via use cases.”	Given <i>platforms and architectures for data and analytics are flexible and buildable</i> , there is a <i>good opportunity to realise value</i> via use cases without significant rework of / additions to what you already have.
Generative AI Stack 2	“We’ve put prior investment into our GenAI technology stack (with our existing architecture in mind) without a use case led approach but would now like to start building on it to drive value via use cases.”	Given <i>GenAI technology is use case dependent</i> , there has possibly been a <i>loss of investment</i> due to <i>stack not aligning with priority value fields of play</i> ; possibly need to invest further into different technologies to facilitate desired use case build.



HOW TO GET YOUR STACK RIGHT THE FIRST TIME

1. Ideate use cases across different value plays
2. Validate and prioritise using the reward vs risk framework, considering the financial and technical feasibility
3. Scope out the technology required to deliver, monitor, evaluate and improve your prioritised use case(s) with your existing tech stack in mind
4. Plan your use case delivery with the required controls and governance in place
5. Ensure required change management for connection of solution(s) into existing business technologies and ways of working for true value realisation

Technology considerations

10



When delivering a GenAI solution, you need to scope out the technology required to deliver, monitor, evaluate and improve it – below are some of the considerations you should make in your investigation.

COMPUTE SCALE

LLMs and GenAI solutions are expensive to run, so it is important to know the balance between managing costs vs impact. Ideally compute should sit with data to avoid mass movements of data and facilitate low latency responses; containers are recommended so multiple people can run the model concurrently across the business.

INTEGRATION

Integration into business operational technologies and ways of working – implementing the necessary change management so solutions don't "sit on the shelf".

PEOPLE PERSPECTIVE

The training of people to ensure they feel confident to use the tools and know how to critically evaluate outputs is the most important piece of this puzzle – *GenAI outputs might only be as accurate as the data that feeds them, but GenAI outputs are only as valuable as the understanding of the people that use them.*

DATA MANAGEMENT

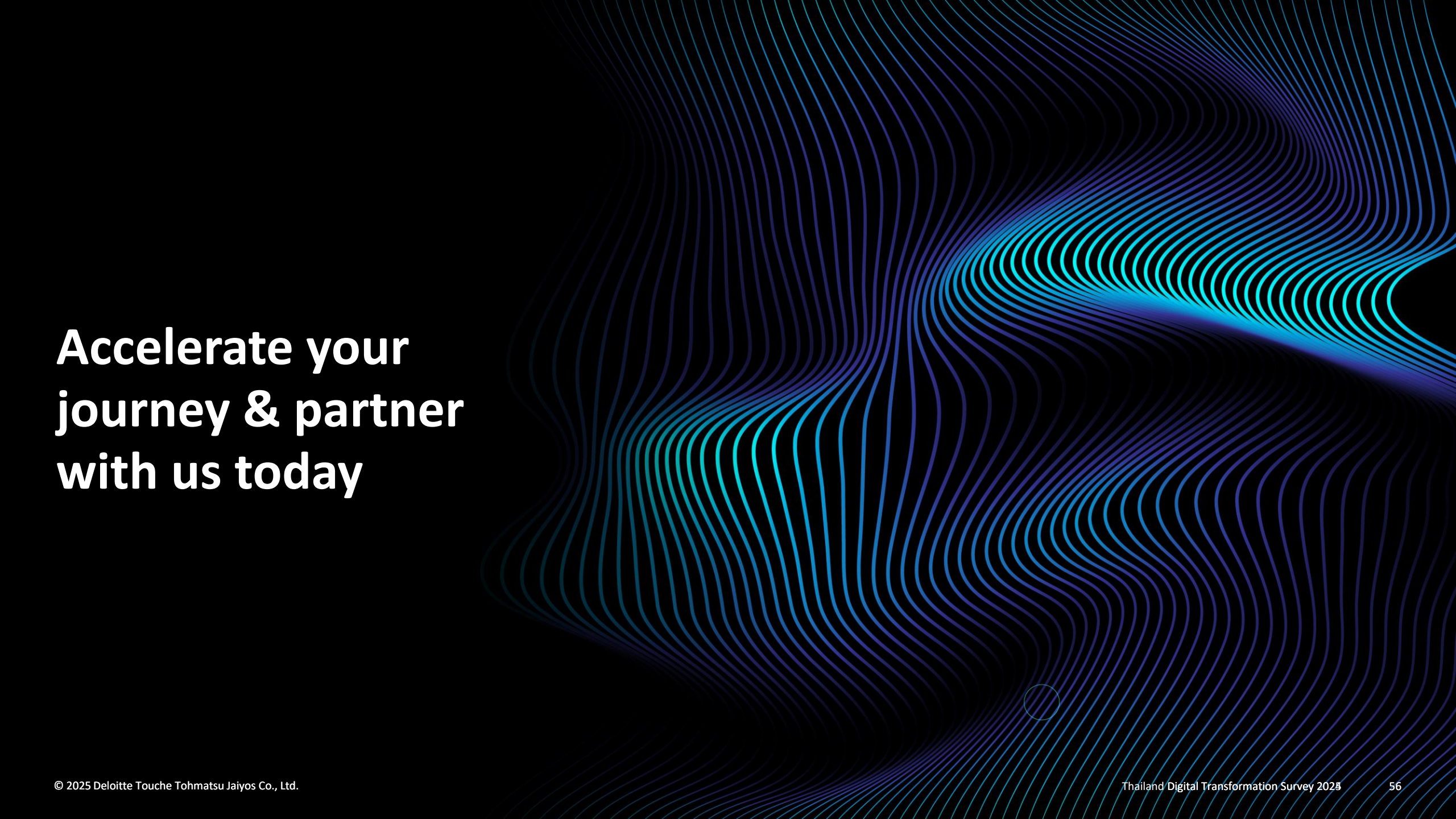
As detailed in the previous section, GenAI needs a lot of low latency, high quality, consistent data with scalable and flexible storage and secure sharing controls.

TOOLING GOVERNANCE

Knowing what models are running where with what data needs to be undisputable for meeting regulation – the inclusion of governance tooling in your solution is key to maintain model registries, to have clear lineage ensuring high risk AI models are visible, to understand the use of data solutions etc.

AUTOMATION TECHNOLOGIES

Considering technologies that facilitate automation is important to support rapid solution build and minimise the operational overheads of running the solutions.



**Accelerate your
journey & partner
with us today**

How can you accelerate your GenAI journey safely, whilst exploring the art of possible?

In partnering with us we can help your organisation turn its GenAI ambition into action.



ENTER YOUR NEW ERA

A barrier to other data and analytics solutions has consistently been adoption at scale. But the productivity gains that Generative AI can deliver on an individual basis mean its adoption is much more likely: the fuel of this productivity revolution is the individual accessibility of GenAI.

But if you throw too much fuel on a fire, it burns beyond your control. Ensuring your approach to GenAI transformation is founded on the **right controls** and a plan that ensures **safe, secure adoption to generate ethical, maximal value** is imperative for success.

To help you understand how your organisation can scale GenAI safely whilst breaking boundaries of efficiency, productivity and creativity, we have built the **AI & DATA LAB**.

To respond to previous waves of technical transformation, we built the IDO Scaling Lab: an immersive and interactive experience which accelerates a data and analytics journey by tackling barriers to scaling. Having seen huge success, (delivering over 150 IDO Scaling Labs to clients across industries) we have built the AI & Data Lab on these foundations.

THE LAB JOURNEY IS NAVIGATED AS A PARTNERSHIP – VIA FACILITATION BY IDO SMES AND AI INSTITUTE EXPERTS, WE SUPPORT YOU IN MAKING MEANINGFUL AND IMPACTFUL DECISIONS, ACCELERATING YOUR GENAI JOURNEY SAFELY AND TURNING YOUR AMBITION INTO ACTION.



THE AI & DATA LAB...



1. Facilitates the making of 10 key GenAI decisions outlined your organisation



2. Is delivered by handpicked IDO SMEs and GenAI experts from the AI Institute



3. Cuts through the complexity to set a baseline level of understanding



4. Focuses on “showing” rather than “telling” through demos and collaborative exercises



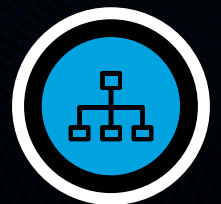
5. Focuses on the safe scaling of GenAI considering risk, technology and people



6. Delivers personalised content and outputs with your organisation's goals at the core



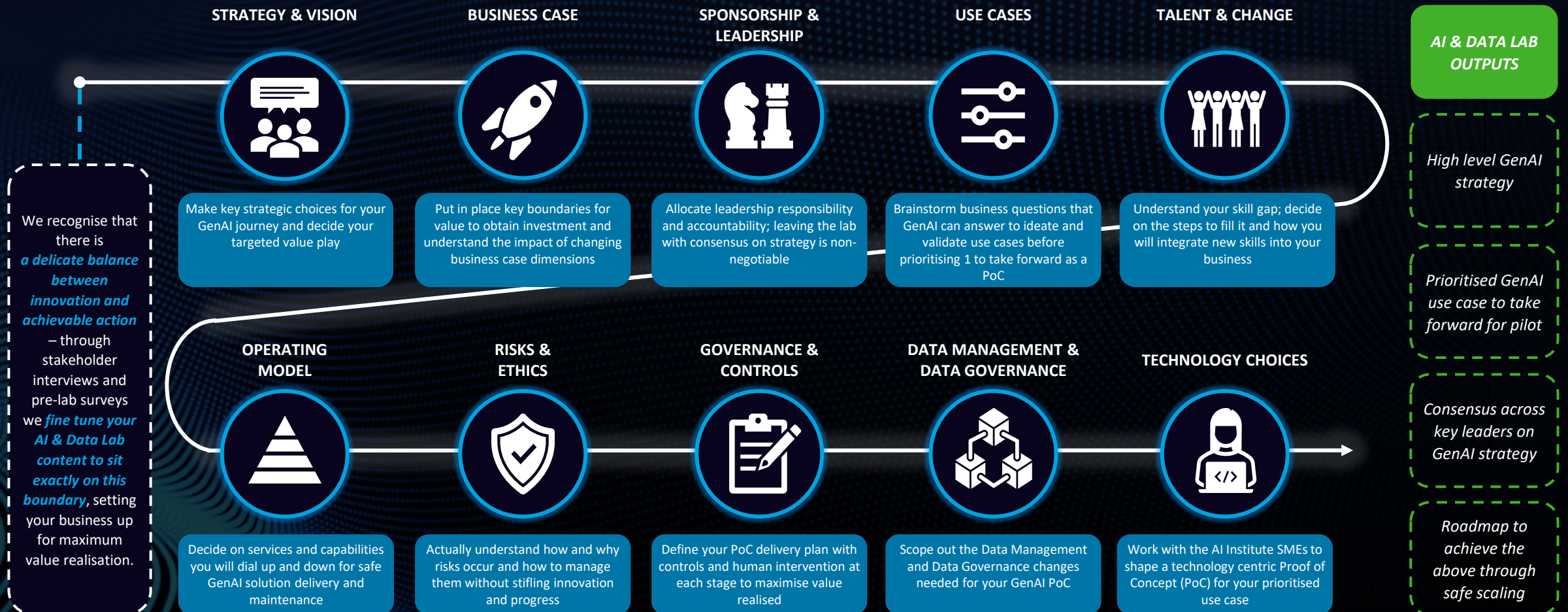
7. Shapes a Proof of Concept (PoC) for a GenAI solution pilot



8. Engages leadership from across the organisation to ensure enterprise-wide engagement

What is the AI & Data Lab?

Our AI & Data Lab modules have been developed in collaboration with The AI Institute and have been designed to cover business and technical fundamentals, address key barriers to AI scaling and build momentum by standing up the fundamentals to AI solution PoCs.



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Thailand Digital Transformation Survey Report 2025



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