



An APJ AI Everywhere Playbook for 2025

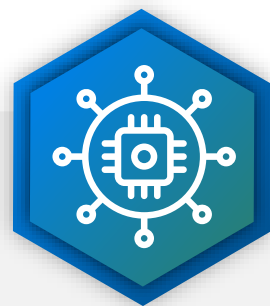
Opening Keynote [EXCERPT](#)

Sandra Ng
GVP and GM for APJ
8th Nov 2024 | Singapore

All Prediction Statements are for APJ



After 18 Months of GenAI Hyper-Experimentation



The GenAI Scramble

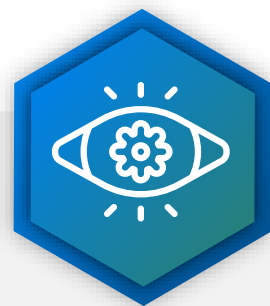
23 PoCs



3 Production Launches



62% Success Rate



Hyper-Experimentation Learnings

"For 2 months, we stopped all IT projects and did nothing except GenAI experimentations across the entire company." ***An Asian leading superapp brand***

An AX Company  **LG U+**



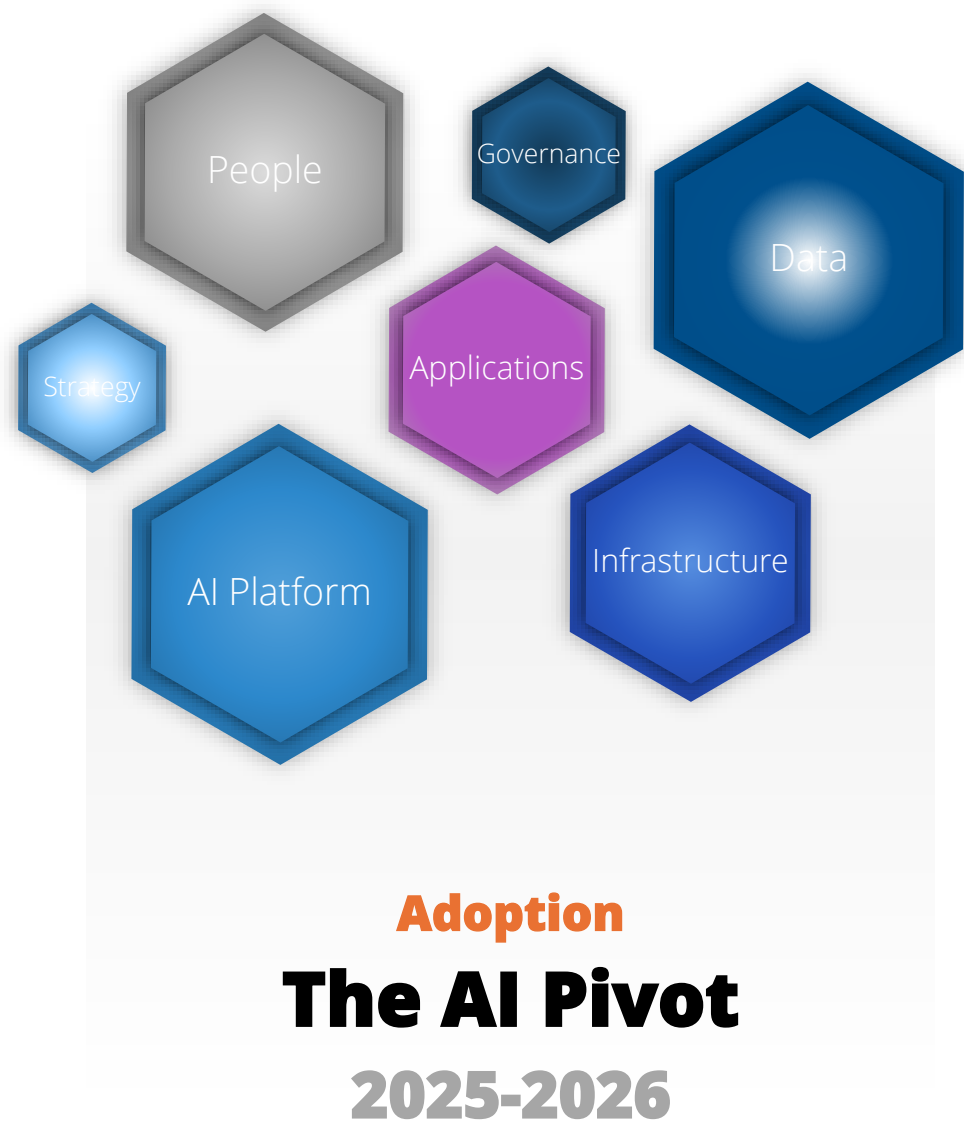
By 2027, APJ business executives will demand a min. 80% success rate on their GenAI initiatives to achieve operational efficiencies and drive new revenue growth.



Experimentation / Adoption Preferences

- Current PoCs/Production: 44% GenAI vs. 56% Composite AI
- GenAI adoption approaches in 2025: 51% Compose, 31% Buy, 11% Build
- Marketing, Procurement, HR, Facilities and SW Development will be the top 5 functional spend in 2025

The AI Pivot



AI spending will grow at 1.7x the rate of overall digital technology spending in the next three years, generating an APJ economic impact of over \$1.6 trillion by the end of 2027.

DX and AI Capability Maturity Matters in the AI Everywhere World



The Most Mature 25-30% of APJ Organizations are in the Best Position to Make the AI Pivot in 2025!

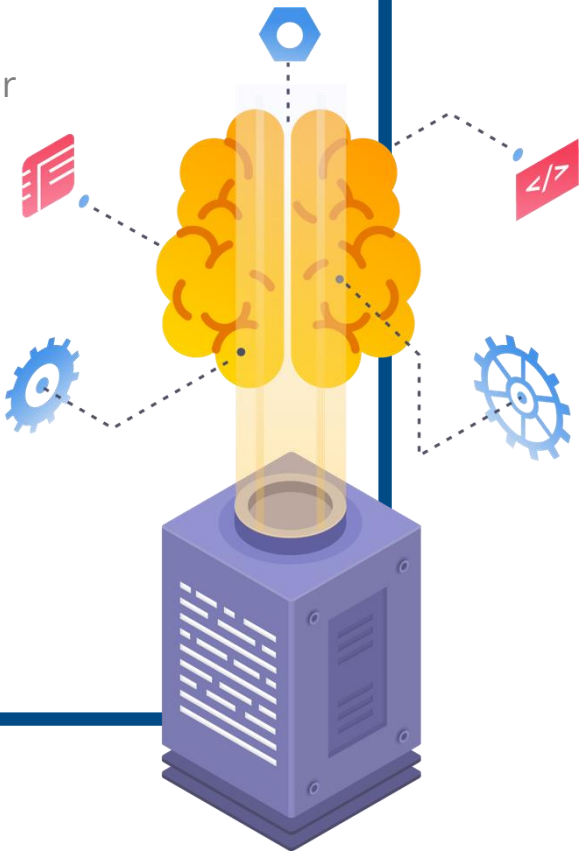
Digital Business Scorecard for APJ Organizations (%)

- 3.9% Leading (DX Leaders)
- 27.1% Enhancing
- 47.6% Development
- 21.4% Nascent (DX Laggards)



AI and ML Capabilities in APJ Organizations

- 5.3% Our AI ML capabilities are ahead of industry peers, they are core to the organization's competitiveness.
- 19.1% Our AI ML capabilities are progressing systematically, with the support of necessary strategy, tools, skills, practices, and processes.
- 16.9% We have seen quantifiable improvement of business goals KPIs out of the invested AI ML capabilities, however there is lack of enterprise-wide strategy to coordinate spending across functions and departments.
- 22.2% We have been leveraging AI ML capabilities to support different projects use cases, however facing challenges in ensuring trust, on-time delivery, or optimized cost for performance.
- 30.9% We have invested in AI ML capabilities, they are mostly in the early stage of implementations developments.
- 5.6% We haven't made any investment in AI ML capabilities.



The Next Wave of Business Transformation



The upcoming milestone involves the expansion of our AI capabilities into a **comprehensive precision agriculture system**. This initiative will integrate drone technology and IoT sensors across all farming operations to further optimize the growth and harvesting of sugarcane. This new phase aims to not only enhance the precision of farming techniques but also to drive sustainable agricultural practices to the forefront of our operations. By leveraging **real-time data collected from drones and ground sensors**, we will be able to monitor crop health more accurately, **predict yield outcomes with greater precision**, and apply resources such as water and fertilizers more efficiently and responsibly.

Mitr Phol Sugar Group

AXA's future digital strategy involves expanding into new markets, enhancing digital infrastructure, and fostering a culture of continuous innovation. The next phase involves expanding the **"insurance as a service" model** to new markets. This expansion will leverage **advanced data analytics and AI-driven insights to tailor services** to regional needs. In addition, AXA's digital infrastructure will be further enhanced by integrating **more advanced AI capabilities and expanding cloud adoption**. These initiatives aim to improve operational efficiency and agility, ensuring AXA remains at the forefront of the insurance industry.

AXA

The Race is On



Key Takeaways

- China successfully trained a generative AI model across multiple data centers.
- Chinese researchers have developed innovative methods to combine GPUs from different brands.
- China remains committed to advancing its AI capabilities and achieving its goal of becoming a global AI leader by 2030.

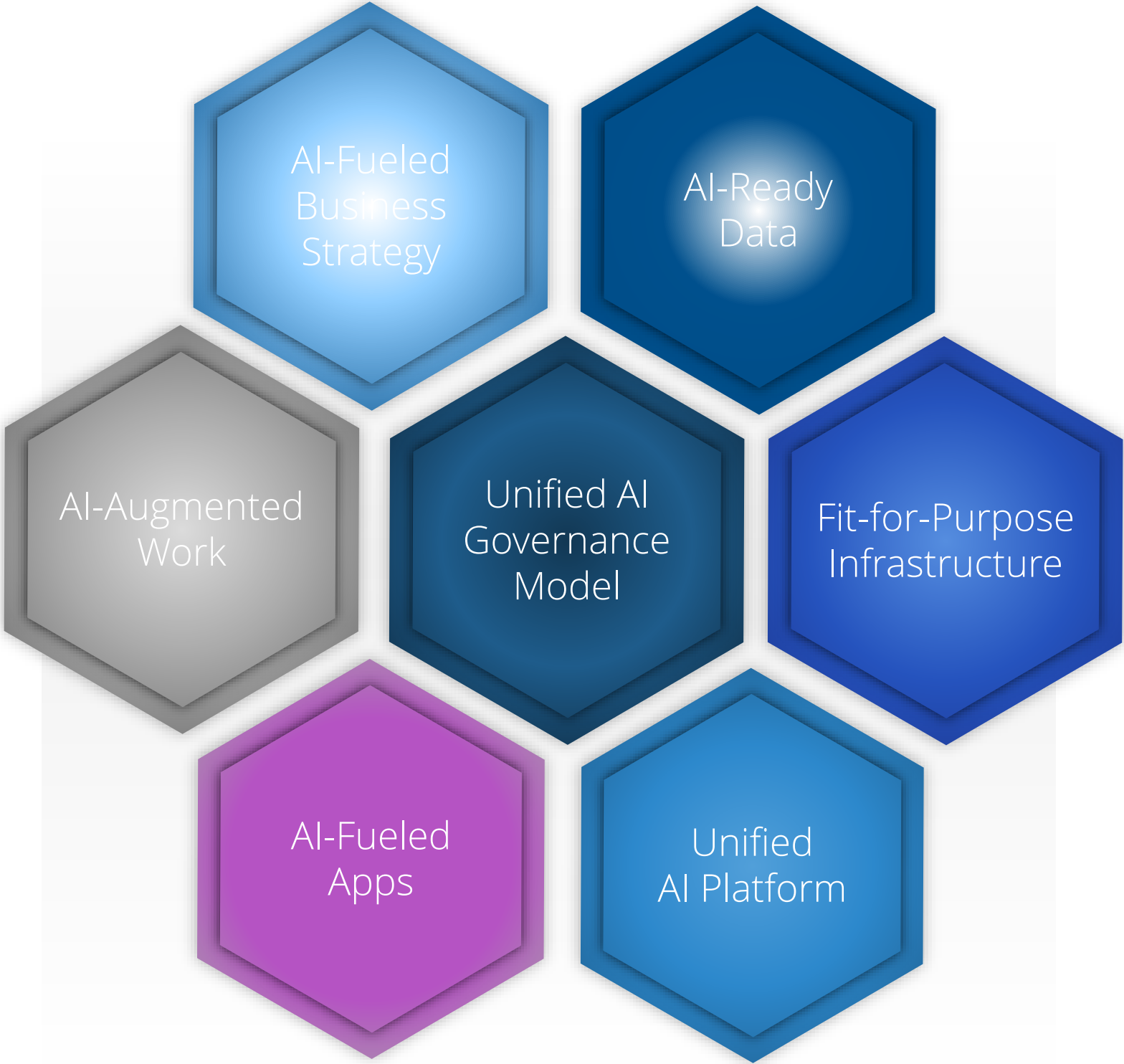
China has achieved a significant breakthrough in AI, successfully training a generative AI model across multiple data centers and GPU architectures.

This feat is especially notable given the current restrictions imposed by U.S. sanctions that limit China's access to advanced chips.

Overcoming GPU Shortages Through Innovation

One of the primary hurdles for China in its **AI** journey has been the limited access to top-tier **GPUs (Graphics Processing Units)** due to U.S. sanctions. These restrictions prevent Chinese companies from acquiring cutting-edge chips like Nvidia's A100, which is crucial for training sophisticated AI models.

The Future State



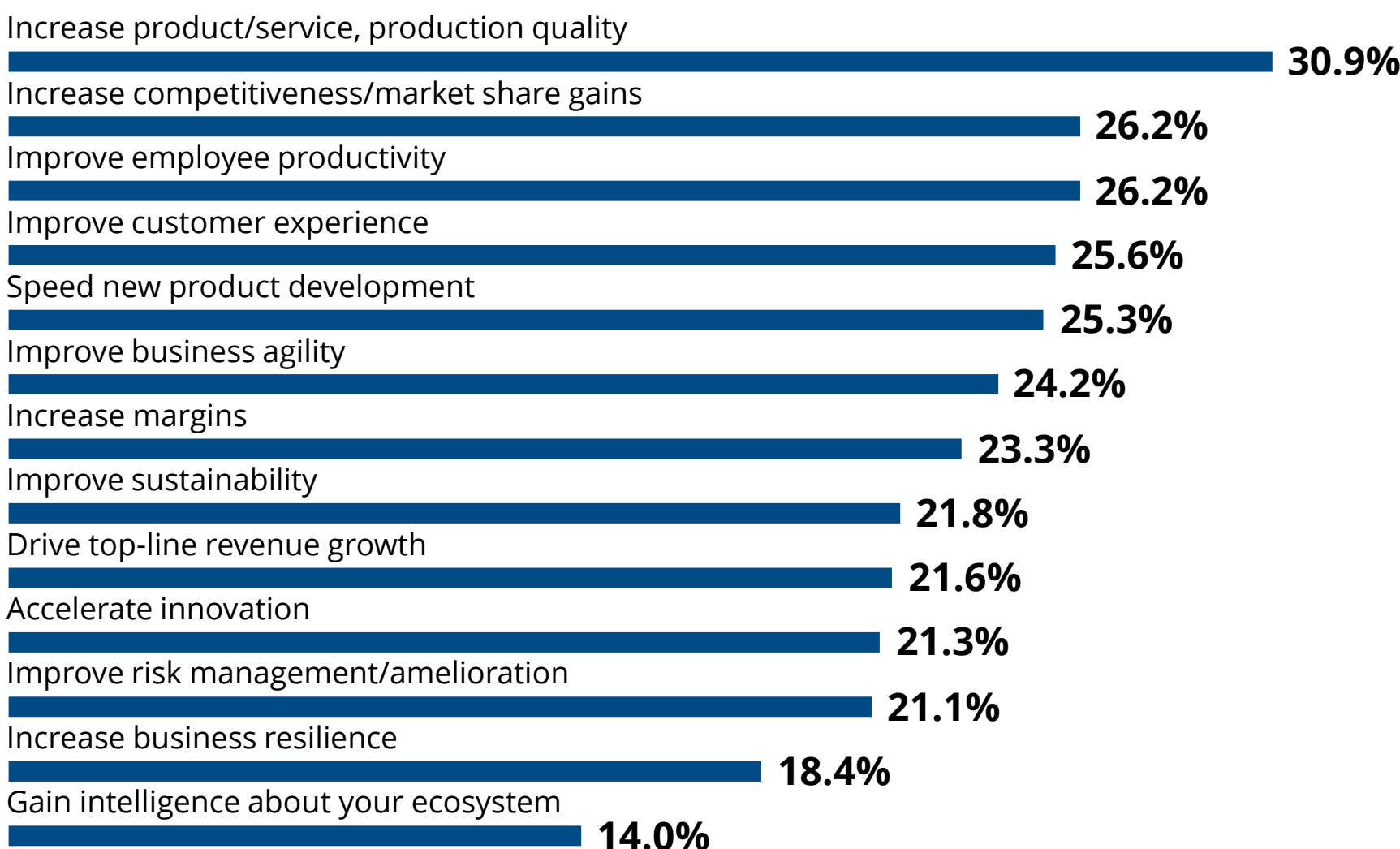
Future State: AI-Fueled Strategy

Lead with Enterprise-wide AI Strategy



In 2026, over one-third of organizations will be stuck in the experimental, point-solution phase of AI experimentation, requiring a shift of focus to enterprise use cases to deliver ROI.

Top Primary Business Drivers for AI Projects (APJ)



Super Use Cases



friday 影音

Future State: Unified AI Governance Model

Align Governance and AI Strategy



By 2025, 70% of organizations will be formalizing policies and oversight to address AI risks (e.g., ethical, brand, PII), aligning AI governance with strategic business goals.

Key Principles of AI Governance



- 94% of APJ organizations have increased the focus on data governance as a result of GenAI hyper-experimentation.
- Top 5 priorities for data management and governance initiatives:
 - Data security
 - Data quality
 - Data privacy and ethics
 - Real-time data management
 - Master data management
- 49% of organizations have since linked business strategy more closely to governance framework but only 13% is fully embedded.



Future State: AI-Augmented Work

Work Model AI Enhancement

Challenge #1: PoC “paralysis”

By 2027, without strategic and organizational pivots, frustration with low ROI due to poor planning and misallocated spending will cause 30% of A2000 organizations to reduce GenAI investments.

IDC
Prediction

Challenge #2: Capability gap

Amid widening global IT skills gaps, by 2027, more than 50% of A2000 enterprises will rely on GenAI-enabled training platforms to automate, accelerate and optimize IT training and skilling outcomes.

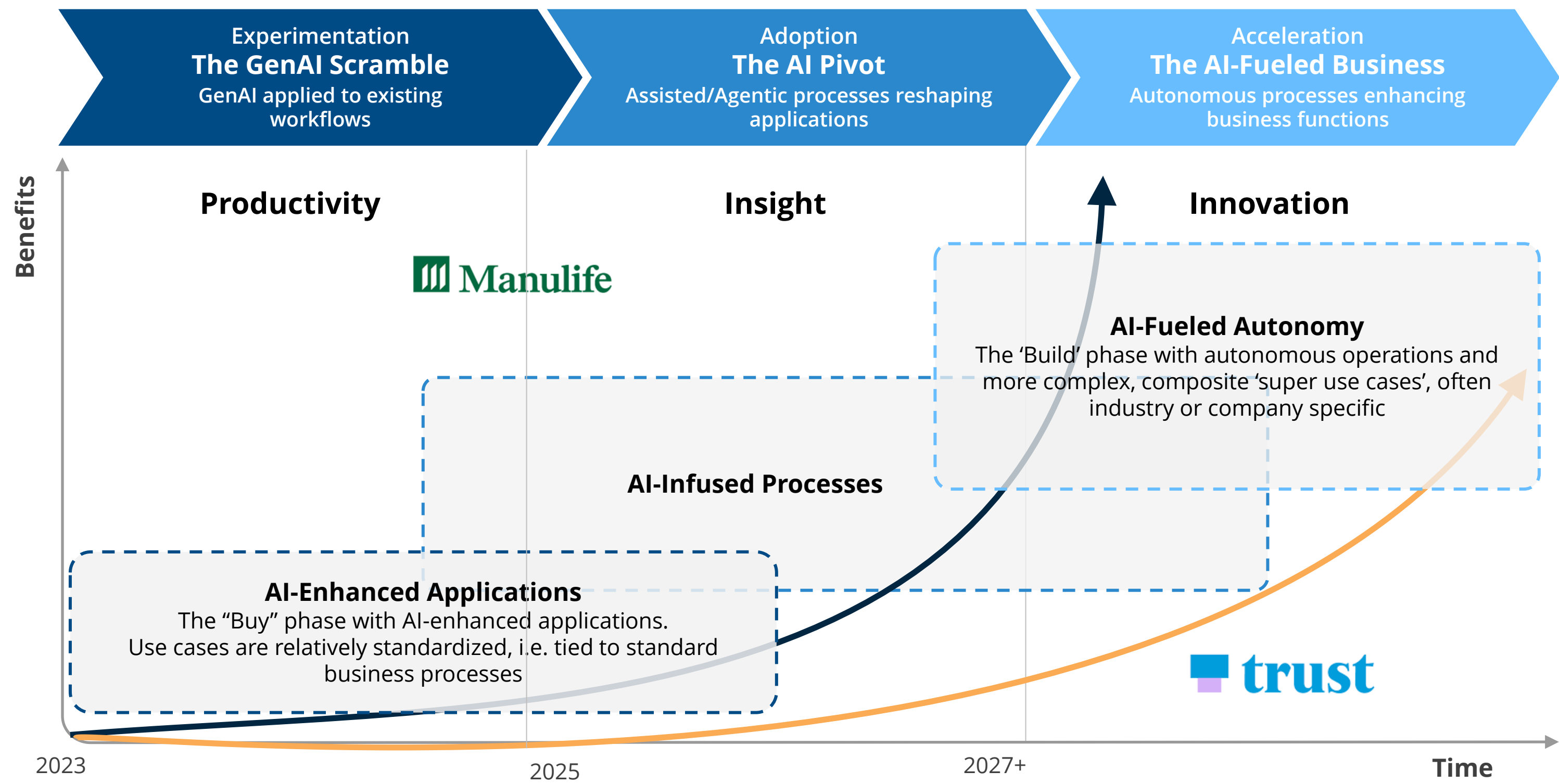
IDC
Prediction

Challenge #3: Change management

“One of the challenges we are having is... when give employees copilot or other tools, they don’t tap into that standard practice of leveraging the technology. They go back to the old norms.”

**CIO, Large
Manufacturer**

Workflow Modernization from AI-Infused to AI-Fueled Apps



Future State: AI-Ready Data

Eliminate Dark Data

**Top challenges
to become a
data-driven
organization**

By 2025, 45% of the A2000 will adopt multicloud data logistic platforms to enable active data migration between hyperscalers to optimize costs, reduce vendor dependencies, and improve governance.

IDC
Prediction

- Poor data quality
- Lack of data automation
- Low data usability
- Lack of data skills/literacy of employees
- Lack of the right tools for data preparation/forecast



**EKOSISTEM
DATA JABAR**

Future State: Unified AI Platform

AI Platform Unification



By 2028, 75% of enterprises that establish an AI platform strategy built on a foundation of connecting processes to broader business functions will achieve enhanced value from their investments.

Scale is Essential

Supply chain, customer-facing and product design/life cycle management apps are the top 3 workflows organizations prioritize to embed GenAI capabilities.

New ROI Benchmarks

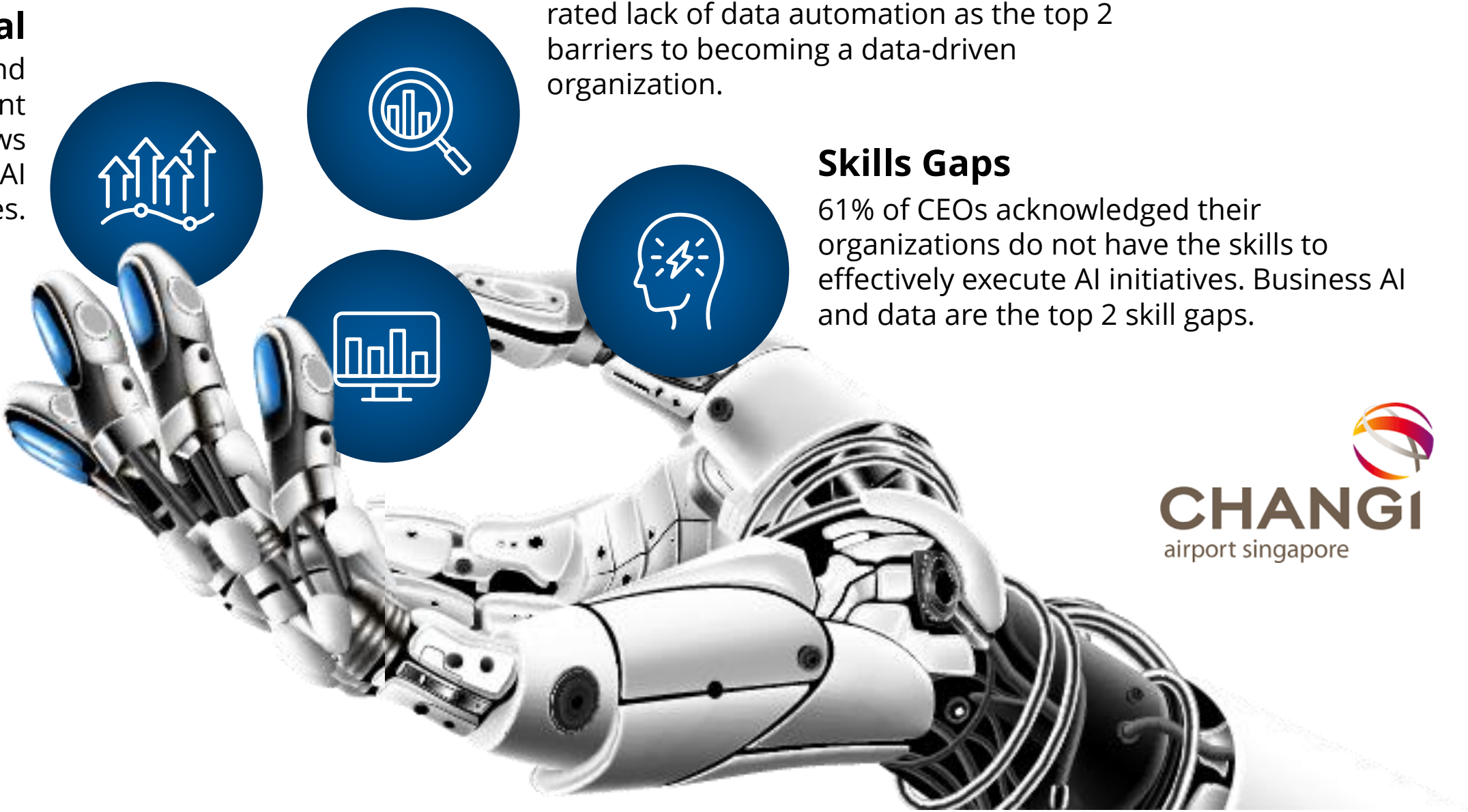
Longer-term cost of supporting AI initiatives is CEO's #1 concern. 43% of organizations are concerned about excessive infrastructure cost in training AI models/running AI apps.

Challenges to be Data-Driven

51% rated poor data quality and 50.3% rated lack of data automation as the top 2 barriers to becoming a data-driven organization.

Skills Gaps

61% of CEOs acknowledged their organizations do not have the skills to effectively execute AI initiatives. Business AI and data are the top 2 skill gaps.



A Platform that Unifies AI Capabilities

A Unified AI Platform is an advanced framework that supports the **entire lifecycle** of GenAI, predictive, prescriptive, and emerging AI models; **seamlessly integrates** with software development for GenAI applications; **interconnects** with AI/ML models; and **orchestrates across** data platforms, infrastructure, and governance systems.

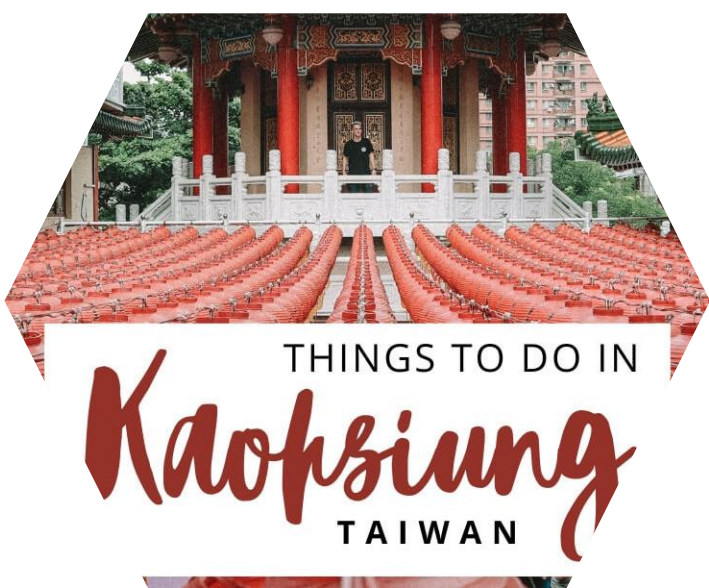
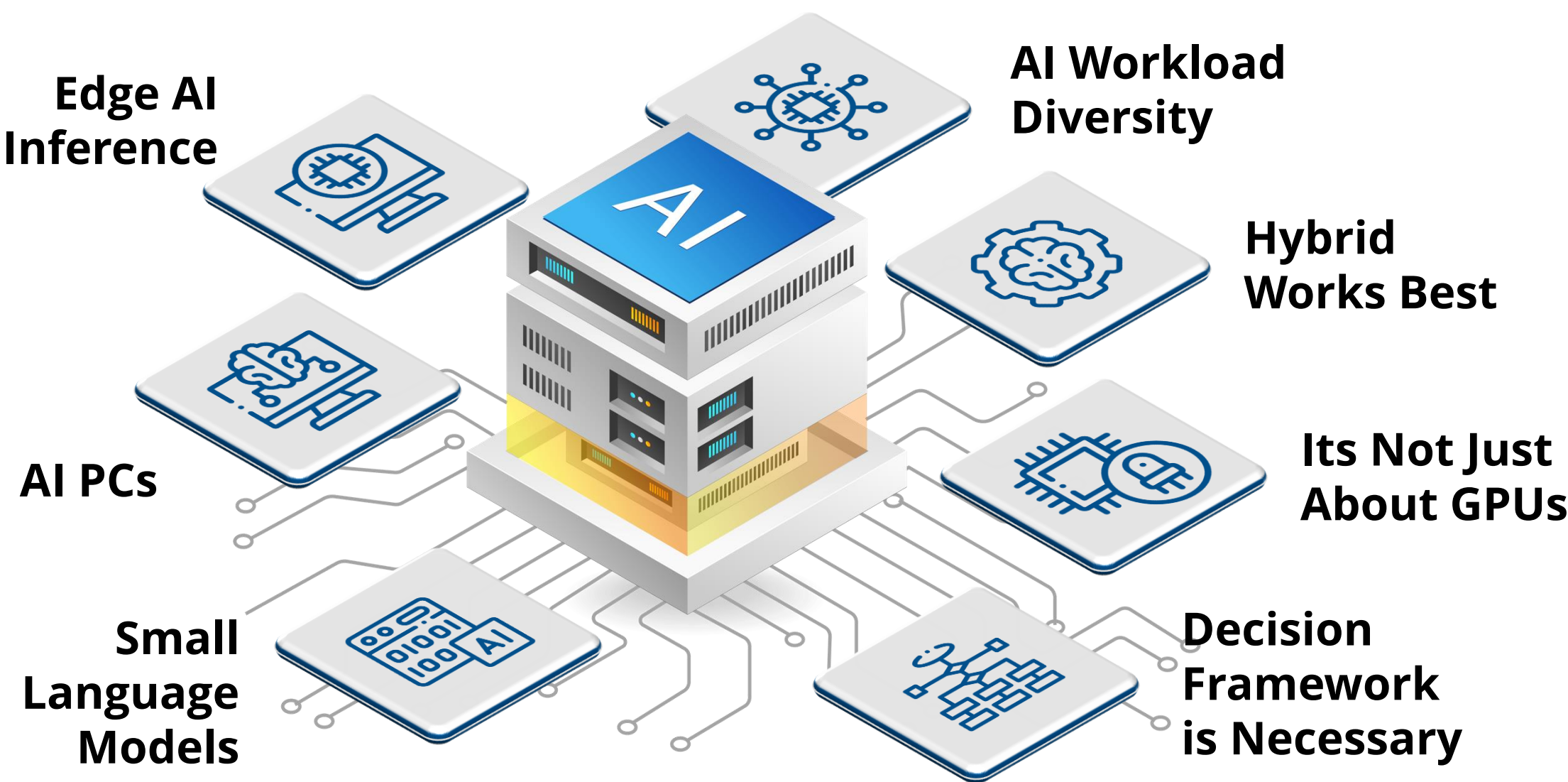
Future State: Fit-for-Purpose Infrastructure

Hybrid Infrastructure for Scale

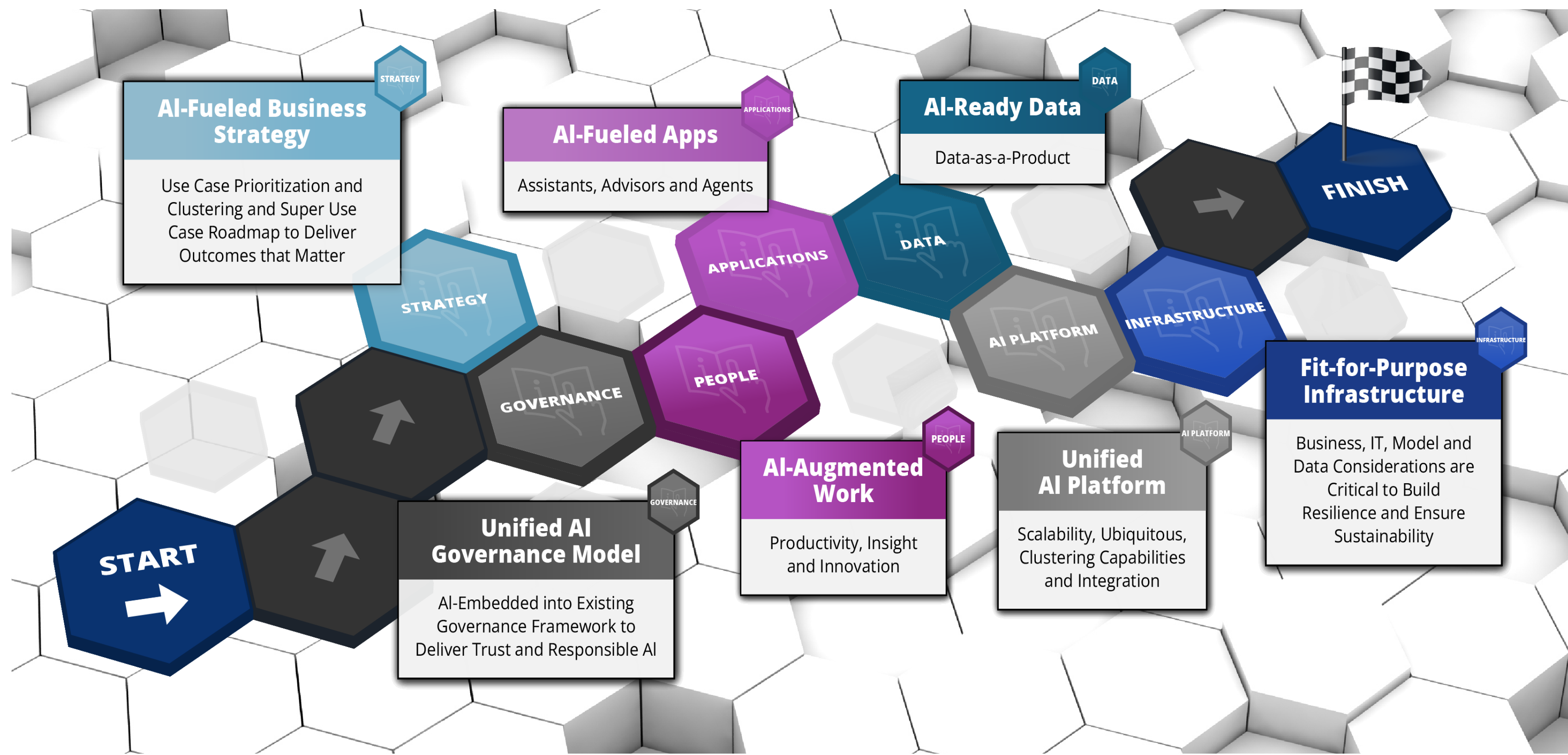


By 2028, 75% of enterprise AI workloads will be deployed on hybrid fit-for-purpose infrastructure to turbocharge time to value while optimizing performance, cost, and compliance.

Why Fit-for-Purpose Infrastructure Matters



The Race to Become an AI-Fueled Business





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