Second ASEAN Start-up Roundtable

Beyond the Hype: Empowering AI-Driven ASEAN Start-ups

Prepared by:

ERIA Digital Innovation and Sustainable Economy Centre (E-DISC)

ERIA
Economic Research Institute for ASEAN and East Asia

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Our deep appreciation also goes to the distinguished speakers and moderators, whose insights enriched the dialogue and provided valuable perspectives on strengthening ASEAN's AI start-up ecosystem. Most importantly, we acknowledge the AI start-up representatives from across the region, whose experiences, challenges, and innovations ensured the discussions remained grounded in real-world perspectives.

Special thanks are also due to the companies that hosted the Jakarta Start-up Ecosystem Site Visit, whose openness in sharing practices, demonstrating AI applications, and engaging with participants greatly enhanced the learning experience.

This roundtable and site visit form part of E-DISC's wider commitment to advancing the region's digital transformation by promoting inclusive innovation and enabling sustainable, collaborative ecosystems. We trust that the knowledge shared and the connections built through this event will continue to foster regional co-operation and strengthen ASEAN's AI and start-up landscape.

E-DISC sincerely thanks everyone who contributed to making this roundtable a success.

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Executive Summary

The **Second ASEAN Start-up Roundtable** convened policymakers, academics, and start-up founders to explore how ASEAN can build an inclusive, competitive, and future-ready AI ecosystem. Discussions focused on AI infrastructure, talent, governance, and investment. Through keynote presentations, panel sessions, and site visits in Jakarta, participants shared practical strategies, local innovations, and collaborative pathways to scale AI responsibly across the region. This summary captures the event's key insights and recommendations.

Advances in Generative AI: Learning from the Matsuo–Iwasawa Lab

The keynote showcased recent advances in generative AI, including large language models, autonomous agents, and robotic foundation models. Matsuo–Iwasawa Lab's 'spiraling AI ecosystem' model connects education, research, and entrepreneurship, emphasising the integration of AI training into real industry contexts. ASEAN was encouraged to position itself as a systems integrator by adapting AI technologies to local needs. Rather than replicating hyperscale infrastructure, ASEAN can focus on domain-specific applications, supported by shared computing resources and enabling regulation. Early success stories underscored the value of equitable collaboration and empowering start-ups as co-creators of value. The region's linguistic diversity was identified as both a challenge and a call for local-first partnerships.

Session 1: Strengthening AI Infrastructure and Data Ecosystems for ASEAN Start-ups

This session addressed the dual challenge of scaling AI infrastructure while ensuring environmental sustainability. Participants highlighted the need for energy-efficient data centres and integrated hardware–software systems. Japan's **ABCI 3.0** was presented as a model of ultra-green infrastructure. Discussions stressed the importance of locally adapted AI tools and harmonised regulation to support inclusive, cross-border innovation. Persistent barriers include fragmented data governance and infrastructure gaps. Proposed solutions included regulatory sandboxes, interoperable data frameworks, and public–private partnerships aligned with national priorities. ASEAN's ongoing efforts on data governance, the ASEAN AI Safety Network, and sustainable data centres were recognised as strong foundations, though more targeted, start-up-oriented support is needed.

Session 2: Strategies to Improve ASEAN AI Talent Development and Retention

This session emphasised the importance of a coordinated regional approach to build ASEAN's AI talent pipeline through shared certifications, mobility programmes, and public–private–academic collaboration. Mission-driven start-up projects were highlighted as effective accelerators, providing hands-on experience in deploying AI. **Malaysia's integrated approach** – combining education, start-up investment, and cross-border collaboration, such as UTM's industry-infused AI degrees and the ASEAN Start-up Initiative – was presented as a model. **Cambodia's Academy of Digital Technology (CADT)** showcased how institutional support and international partnerships can build long-term digital capabilities. The session noted the paradox between lean AI start-ups and ASEAN's large youth workforce, shifting the focus from headcount to AI fluency as the key measure of success. AI was framed as a driver of job creation, calling for inclusive upskilling across all sectors.

Session 3: Navigating the AI Regulation and Investment Landscape

Panelists explored how ASEAN can align AI regulation and investment to enhance regional competitiveness. They urged governments to reframe regulation around adoption, awareness, and capacity-building, with public institutions leading by example. Persistent fragmentation was identified as a barrier; mutual recognition, transparency, and interoperable frameworks were recommended as solutions. Flexible, principles-based governance aligned with global standards was viewed as critical. On the investment side, participants emphasised strengthening enterprise–start-up collaboration, educating regional investors, and expanding proof-of-concept funding. Regional mechanisms such as DEFA were seen as key to enabling cross-border AI growth, while digital trade and data governance were highlighted as critical enablers for scaling innovation.

Jakarta Start-up Ecosystem Site Visit

The site visit highlighted how Indonesian companies and institutions are advancing inclusive, locally adapted AI solutions. GoTo presented *Sahabat-AI*, an open-source Indonesian language LLM designed to empower local developers and digital services. Traveloka demonstrated AI-driven personalisation, customer service automation, and user experience upgrades through Travel Expert. At Living Lab Ventures, participants explored smart city applications, including auto-classification dashboards and sentiment analysis in BSD City. The University of Indonesia's Science Techno Park highlighted ethical AI in healthcare, including Herlens' cervical cancer diagnostics. The visit underscored the critical role of public–private–academic collaboration in advancing context-aware, user-centred AI innovation.

Recommendations for a Vibrant, Inclusive, and Scalable AI Ecosystem in ASEAN

- Build AI-Ready Sustainable Infrastructure and Data Ecosystems
  - Accelerate investment in energy-efficient AI infrastructure, including GPU-enabled data centres and green cooling technologies.
  - Promote regional computing hubs and shared cloud infrastructure to broaden access while managing energy and cost constraints.
  - Advance interoperable data governance frameworks to support trusted cross-border data flows for AI model training and scaling.
  - Encourage the development of localised AI models to ensure cultural relevance, inclusion, and digital literacy.
- Strengthen Regional AI Talent Pipelines
  - Develop a coordinated regional roadmap for AI talent, including shared certifications, mobility programmes, and collaborative research.
  - Embed AI education in real-world contexts through start-up projects, industry-attached degrees, and practical deployments.
  - Address the paradox of lean AI start-ups and a growing workforce by prioritising AI fluency, reskilling, and job transformation.
  - Scale AI upskilling initiatives across disciplines, including non-tech sectors, to build a digitally capable workforce.

- **Create Fit-for-Purpose AI Regulatory and Governance Frameworks**
  - Reframe regulatory priorities around adoption, literacy, and capacity-building, including AI integration in education and public procurement.
  - Design flexible, risk-based frameworks aligned with global norms but tailored to ASEAN's diversity, using tools like sandboxes and DEFA.
  - Strengthen harmonised AI safety initiatives, including the ASEAN AI Safety Network, to promote trust, transparency, and interoperability.
- **Optimise AI Investment through Education and Demand Creation**
  - Enhance AI literacy among investors and enterprises to improve adoption and funding of practical AI solutions.
  - Expand proof-of-concept funding schemes and enterprise-linked pilots to help start-ups validate solutions and secure business opportunities.
  - Promote open innovation platforms and corporate–start-up collaboration to accelerate scaling through infrastructure, data, and testbeds.
- **Promote Regional Integration and Knowledge Sharing**
  - Foster cross-border partnerships enabling ASEAN start-ups to act as systems integrators, adapting frontier technologies to local needs.
  - Prioritise linguistic diversity and local-first approaches to ensure AI applications remain inclusive and context-aware.
  - Build trust through early success stories, stronger public–sector alignment, and connected innovation ecosystems that retain talent and scale impact.

Second ASEAN Start-up Roundtable

Beyond the Hype: Empowering AI-Driven ASEAN Startups

ERIA Digital Innovation and Sustainable Economy Centre (E-DISC)
28–29 April 2025, Jakarta, Indonesia

Introduction

Background

ASEAN is emerging as a dynamic hub for artificial intelligence (AI) innovation and start-up growth. In the first half of 2024 alone, the region attracted over US$30 billion in AI infrastructure investments (Google et al., 2024). It reflects strong market confidence and a strategic drive to leverage AI's transformative potential. This momentum is further demonstrated by ASEAN's vibrant start-up ecosystem, which comprises more than 4,000 start-ups with a combined valuation exceeding US$131.2 billion (ASEAN Startup, n.d.). These figures highlight the region's entrepreneurial vitality and promise for digital economic growth.

AI-driven start-ups are making significant inroads across diverse sectors, including finance, healthcare, logistics, and sustainability. It showcases the deepening integration of AI

technologies within ASEAN's innovation landscape. Public interest has also surged, evidenced by an elevenfold increase in online searches for AI solutions over the past four years (Temasek, 2024), underscoring growing societal awareness and demand for AI-enabled services.

Despite these encouraging developments, structural challenges persist. Infrastructure gaps – including uneven data access, high cloud computing costs, and connectivity barriers in less-developed areas – continue to limit inclusive digital participation. Meanwhile, shortages of skilled talent, particularly in fields like machine learning and large language models, constrain workforce growth. Regulatory uncertainties and fragmented markets further hinder early-stage investment and impede the scalability of AI innovations. Both investors and entrepreneurs emphasise the need for clearer policies, stronger public-private partnerships, and robust intellectual property frameworks to support the next phase of growth.

To catalyse regional cooperation and optimise start-up and innovation potential, Malaysia launched the ASEAN Startup Year 2025 initiative to showcase ASEAN's vibrant entrepreneurial landscape. Through the ASEAN Technology Start-up Ignite Initiative, a Priority Economic Deliverable during its 2025 ASEAN Chairmanship, ASEAN launched the Startup ASEAN platform which aims to empower founders, strengthen the start-up ecosystem, and link ASEAN's local innovation networks to global opportunities.

Against this backdrop, the Second ASEAN Start-up Policy Roundtable was held on 28–29 April 2025 in Jakarta, convened by the Economic Research Institute for ASEAN and East Asia (ERIA) through ERIA Digital Innovation and Sustainable Economy Centre (E-DISC). Building on the inaugural roundtable in 2024, the event brought together government officials, experts, start-up founders, and international organisations for in-depth dialogue on fostering a more inclusive, resilient, and AI-enabled start-up ecosystem in ASEAN. Discussions focused on four strategic areas: enhancing AI infrastructure and data ecosystems, addressing talent gaps, advancing agile and responsible regulation, and improving investment approaches for AI start-ups.

Complementing the policy discussions, participants also took part in a Jakarta Start-up Ecosystem Site Visit, exploring innovative organisations such as GoTo, Traveloka, Living Lab Ventures, and the Science Techno Park of the University of Indonesia. These visits provided practical insights into AI innovation, talent development, and investment models, enriching regional policymaking and ecosystem strengthening efforts.

Opening Remarks from the ERIA President

H.E. Tetsuya Watanabe

'Today, we stand at the intersection of digital transformation and artificial intelligence. Only by working together can we unlock innovation that is both commercially viable and socially impactful.'

In his opening remarks at the Second ASEAN Start-up Roundtable, ERIA President Tetsuya Watanabe underscored the urgency of building a resilient, inclusive, and innovation-driven AI ecosystem in Southeast Asia. Welcoming a diverse gathering of policymakers, start-up founders, investors, academics, and experts, President Watanabe set the tone by highlighting the transformative potential of artificial intelligence across the ASEAN region.

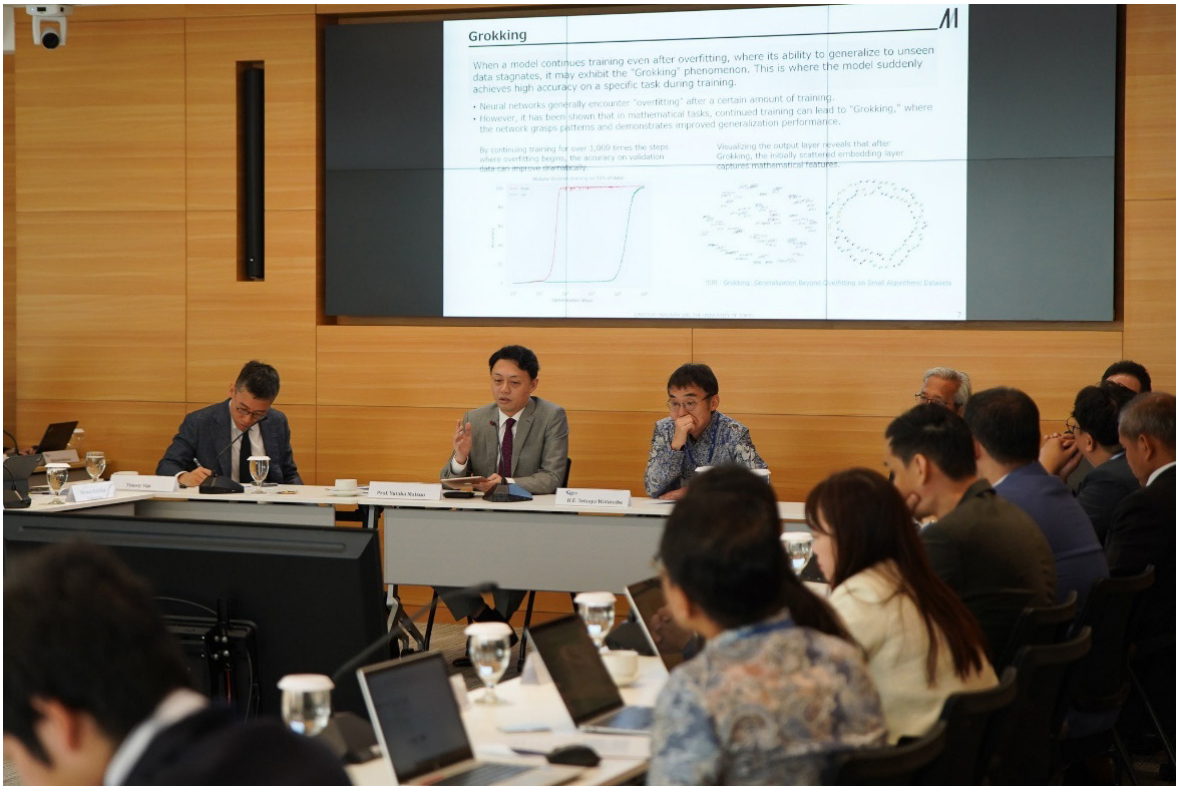
He noted that recent breakthroughs – particularly in foundation models and AI development platforms – are making sophisticated AI tools more accessible to regional start-ups. With the right support, AI could add up to US$1 trillion to ASEAN's GDP by 2030. Yet, he cautioned, unlocking this potential requires more than optimism. ASEAN's emerging tech sector still faces significant constraints in infrastructure, talent, computing power, and governance. These challenges are further compounded by tightening funding conditions, geopolitical uncertainty, and macroeconomic headwinds – especially for early-stage start-ups in AI, semiconductors, and advanced manufacturing.

President Watanabe called for stronger collaboration amongst stakeholders to remove structural barriers and ensure that start-ups can scale sustainably. To this end, the ERIA Digital Innovation and Sustainable Economy Centre (E-DISC)will serve as a multistakeholder platform to help ASEAN harness AI innovation not only for economic growth but also for inclusive, sustainable, and future-ready development.

Advances in Generative AI: Learning from the success of Matsuo–Iwasawa Lab

Frontiers of Generative AI Research

The keynote presentation opened by tracing technical foundations of Large Language Models (LLMs), such as transformers and self-supervised learning, which have enabled the scaling of model performance without reliance on human-labeled data. It introduced DeepSeek-R1, an open-source model from China with performance rivaling proprietary models like OpenAI's o1, demonstrating that frontier capabilities are increasingly accessible. A notable research phenomenon – 'grokking' – was also explained, where overtraining initially leads to overfitting but eventually results in deep generalisation, allowing the model to understand complex, structured patterns. These insights underline that the development of LLMs is not only a question of scale, but also of training strategies and data quality.



Keynote presentation at the Second ASEAN Start-up Roundtable

Emerging Trends in AI Agents and Robotic Foundation Models

Beyond text-based models, the presentation emphasised the rise of AI agents that can autonomously navigate digital environments – clicking, typing, and executing multi-step commands across interfaces. These tools are already being deployed to automate routine business tasks. Parallel advancements are occurring in robotic foundation models, which integrate multimodal inputs such as vision, language, and sensor data. Demonstrations included general-purpose robots performing tasks like folding laundry, enabled by generative models trained on diverse real-world activities.

A crucial bottleneck identified in robotics is the availability of high-quality training data. In response, Japan established the AI Robot Association (AIRoA) in late 2024 to create an open, shared data infrastructure for robotic learning. This platform seeks to support even small and medium enterprises (SMEs), making robotics innovation more inclusive. For ASEAN, such collaborative data ecosystems offer a opportunity to leapfrog in physical automation without needing to build proprietary infrastructure from scratch.

The Spiraling AI Ecosystem Model by Matsuo–Iwasawa Lab

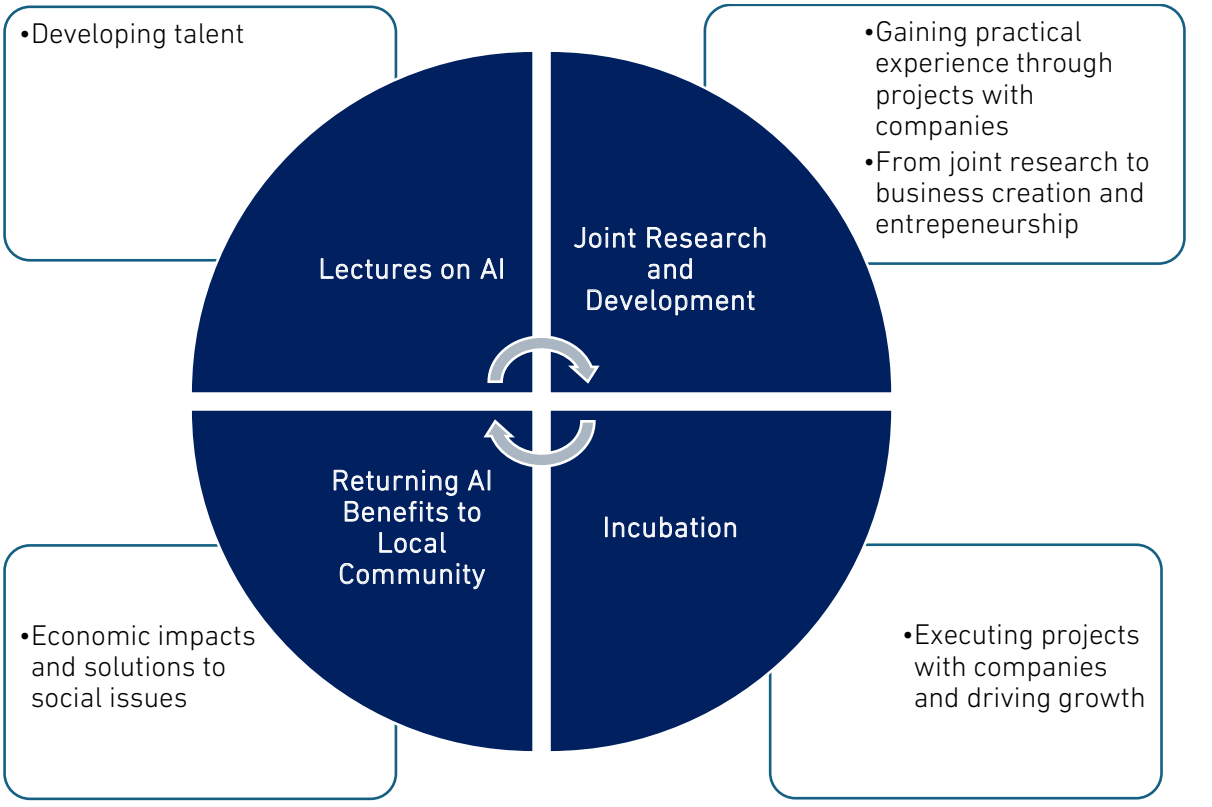
Matsuo–Iwasawa Lab's 'spiraling ecosystem' model was showcased, which integrates AI education, applied research, corporate collaboration, and startup incubation into a dynamic, self-reinforcing cycle. More than 27,000 students from junior and high schools have participated in the Lab's open AI courses to gain technical and business skills through hands-on projects with Japanese companies. These real-world engagements allow students to work as team members, and in some cases project leaders to address actual industry problems using AI.

This spiraling model is not a linear talent pipeline, but a circular ecosystem. Lectures feed into collaborative projects, which in turn give rise to startups. As these startups succeed, they reinvest back into the ecosystem through funding, mentorship, and data-sharing, creating a cycle of innovation and capability development.

This experience holds lessons for ASEAN. In AMS, there is growing interest amongst youth in AI, but limited access to practical opportunities. Embedding AI training within real industry contexts – through joint research, applied projects, and entrepreneurial pathways – can bridge this gap. AMS can adapt the spiraling model to their own contexts, building ecosystems where local talent is empowered, innovation is localised, and economic value is returned to communities.

Building on the success of its model, Matsuo–Iwasawa Lab aims to engage and deepen collaboration with countries in ASEAN and Africa in strengthening regional innovation ecosystems. The goal is to localise its principles – focusing not on replication, but on adaptation – to strengthen regional innovation ecosystems, reduce talent outflow, and embed AI in sectors important to national development.

Figure 1. Matsuo-Iwasawa Lab's Spiraling AI Ecosystem Model Through Talent Development, Industry Collaboration, and Entrepreneurship



Source: Matsuo, 2025.

Localising Innovation and Creating Value

The value of generative AI is realised not in model development alone, but in its practical application. ASEAN startups were encouraged to act as systems integrators, adapting frontier technologies to address local needs in sectors such as agriculture, logistics, and public services. Even modest AI ventures can create significant impact by empowering traditional industries, enhancing productivity, and addressing underserved markets. Japan's experience with 'global niche top' SMEs – world leaders in specialised manufacturing – was shared as an example of how localised excellence can compete globally.

Open Discussion

Fostering Japan–ASEAN AI Collaboration

for meaningful ASEAN–Japan AI partnership, Participants emphasised for ASEAN firms to move away from providing training data or low-cost labor towards a more equitable, value-creating collaboration. Start-ups in Indonesia were encouraged to co-develop use cases in local industries such as agriculture, mining, and manufacture where AI can deliver immediate impact. However, it was also noted that language remains a barrier in both training data and technical collaboration, making local-first partnerships a practical starting point for ASEAN firms before expanding cross-border.

From Systems Integration to Capability Building

ASEAN's path to AI leadership was framed not as building foundational models from scratch, but as integrating and adapting global technologies to local needs. This systems integrator role allows ASEAN firms to gain technical expertise while solving real problems in their own contexts. Panelists stressed that access to real-world problem environments, such as farms or manufacturing sites, is essential to developing relevant AI solutions, mirroring strategies used in other industries like chemicals or oil and gas.

Navigating Energy Costs and Infrastructure Limits

High electricity costs, especially in Japan and Thailand, were raised as constraints to large-scale model training. However, the session noted that countries need not replicate hyperscale infrastructure. Instead, ASEAN can focus on fine-tuning and domain-specific training, which are less compute-intensive and more accessible. Shared regional infrastructure, such as compute hubs, could support broader participation while managing energy and cost efficiency considerations.

Balancing Regulation and Innovation

Participants discussed how to regulate AI without stifling innovation. An approach to enhance transparency and adapt existing laws was presented as a balanced model. Rather than drafting new AI-specific legislation, governments were encouraged to build institutional capacity, monitor emerging risks, and intervene only where necessary. Regulation, when designed well, can enhance trust and innovation simultaneously.

Building AI Ecosystems Through Demonstrated Success

Reflecting on what makes a successful AI ecosystem, a key insight from the Matsuo-Iwasawa Lab experience was the importance of early, visible success stories. In 2015, the lab's first start-up reached IPO, followed by another successful startup in 2017. These events inspired students and collaborators to believe that AI entrepreneurship was both viable and impactful. It also led to greater confidence from participants in the ecosystem, deeper links with industry, and more robust education and incubation programmes. Importantly, the Matsuo–Iwasawa Lab's journey – starting from a few student-led projects and scaling through demonstrated outcomes – highlighted the idea that success builds upon success. For ASEAN, this offers a practical example for building trust, retaining talent, and growing innovation ecosystems that are locally relevant yet globally connected.

Collaboration for an Innovative AI Ecosystem

Participants deliberated on how ASEAN and its partners such as Japan can collaborate more effectively to ensure that ASEAN can be part of the entire generative AI value chain, from providing training data and innovative end-use application. Startups in the region must be supported not just as data providers, but as co-creators of value. As such, start-ups are encouraged to co-develop use cases in targeted industries such as agriculture and logistics, where AI can deliver immediate impact on food security and connectivity. At the same time, language diversity within the region was recognised as a barrier in both training data and technical collaboration, making local-first partnerships a practical starting point for ASEAN firms before expanding cross-border.

Session 1: Strengthening AI Infrastructure and Data Ecosystems for ASEAN Start-ups

Building Energy-Efficient AI Infrastructure for Sustainable Growth

The session began with a discussion on the rising energy demands associated with AI, particularly the growth in model training and inference. Training workloads are increasing by an estimated 4.6 times annually, while inference usage – deploying models in real-world applications – has expanded up to 80 times year-over-year (EPOCH AI, 2025; OpenRouter, n.d.). These trends raise important concerns about sustainability.

Panelists and moderator exchange views on strengthening sustainable and inclusive AI infrastructure

Participants emphasised that the energy cost of AI is not just a technical challenge but a strategic issue that must be addressed to ensure long-term inclusive growth. To meet rising compute demand while staying within environmental limits, a holistic approach is needed – one that combines energy-conscious hardware, optimised software, and smart infrastructure planning. This includes vertical integration across the AI value chain, such as designing efficient semiconductors, building lightweight models, and developing full-stack systems that reduce power consumption.

The conversation expanded to the physical infrastructure supporting AI development. While ASEAN is seeing rapid investment in data centres, many facilities still lack AI-ready capabilities – particularly GPU integration and efficient cooling systems. To bridge this gap, participants called for policy incentives that encourage the construction of AI-capable and environmentally sustainable data centres. These could include requirements for AI workload compatibility, green energy use, and tax or financing incentives tied to efficiency benchmarks.

Technological solutions already exist to support this transition. Innovations like free cooling, hot-water cooling, and high-temperature operation were cited as feasible even in humid tropical environments – offering ASEAN member states a viable path to balance compute needs with climate goals.

Box 1. Case Study: Japan's ABCI 3.0 – Ultra-Green AI Infrastructure

The AI Bridging Cloud Infrastructure (ABCI) 3.0, developed by Japan's National Institute of Advanced Industrial Science and Technology (AIST), offers a compelling model of how high-performance AI systems can operate sustainably. With 6.22 exaflops of peak performance and 6,128 NVIDIA H200 GPUs, ABCI 3.0 ranks amongst the most powerful open AI platforms available.

What sets ABCI 3.0 apart is its ultra-green data centre strategy. Located in Japan – a country with limited renewable energy options – the facility uses hot-water cooling and high-temperature operation, reducing the need for conventional energy-intensive air conditioning. Its hybrid cooling system combines water vaporisation with air control to maintain operating temperatures below 32°C, significantly cutting electricity use and water stress – an increasingly relevant concern for many ASEAN countries.

In addition, ABCI 3.0 features scalable infrastructure with shared GPUs, modular job scheduling, and user-controlled container environments. All of this operates within a 6MW electrical capacity, demonstrating that high-end AI workloads can be met with thoughtful infrastructure design and sustainability at the core.

For more information about ABCI: https://abci.ai/en/

By showcasing how infrastructure like ABCI 3.0 balances high performance with environmental responsibility, participants argued that ASEAN can look to similar models when planning its own regional AI capacity. The case also reinforces the broader point: sustainable AI development is not only possible, it is necessary for long-term innovation and resilience in the region.

Embedding AI in Cultural and Economic Realities

The discussion emphasised the need for locally adapted AI models that reflect the cultural and linguistic diversity of Southeast Asia. Examples illustrate how generative AI tools, when built solely on globally trained data, can produce outputs that misrepresent or misalign with local imagery and language. This disconnect highlights the need to develop AI infrastructure and datasets that serve regional realities.

Panelists noted the vast economic potential of AI in ASEAN and called for an approach that includes investment in cloud infrastructure, support for GPU access, digital talent development, and public–private collaborations. Strategic analogies were drawn to past technological transformations – such as the US leadership in computer science – and the importance of aligning national AI ambitions with industrial goals. There was also a call for enabling regulatory reform, such as easing spectrum fees and fostering localised AI use cases that can scale across borders.

Regional Integration Through Alignment and Harmonisation

In addition to regulatory fragmentation concerning cross border data flows, data privacy and protection, other barriers to cross-border AI collaboration, development and deployment that were identified include inconsistent cybersecurity protocols, unaligned intellectual property rights, and varied levels of infrastructure standardisation. These differences complicate efforts to scale AI start-ups and build integrated digital markets across the region. These inconsistencies complicate cross-border data flows – an essential element for training AI models, developing local solutions, and scaling regionally. Startups, particularly those with limited resources, struggle to comply with divergent regulatory environments, making it difficult to partner with enterprise clients or expand across borders.

Drawing inspiration from the open-source software community, panelists suggested that ASEAN could benefit from community-driven models of governance – featuring transparent contribution rules, quality assurance mechanisms, and consensus-building processes. These approaches can foster both innovation and accountability, especially in complex regulatory environments.

Participants also cited examples from international smart city platforms, where agencies agreed on common data protocols and cybersecurity baselines, enabling seamless collaboration without compromising sovereignty. A proposed model for ASEAN involves governments seeding infrastructure investments that are then maintained through pay-per-use schemes – ensuring sustainability and open access. Under this framework, countries and institutions retain control over their own data and infrastructure but agree on shared standards for interoperability, creating a trusted foundation for regional cooperation.

Open Discussion

Addressing Cross-Border Data Barriers for AI Start-ups

A recurring concern was the fragmentation of data regulations across ASEAN. Start-ups operating regionally cited restrictions that prohibit data from leaving national borders complicate efforts to aggregate and analyse the diverse datasets essential for building robust AI models. These regulatory inconsistencies increase costs and delay service delivery, particularly for resource-constrained early-stage companies.

There was a call to develop a harmonised regional data governance framework – modeled loosely on global approaches like the (General Data Protection Regulation) GDPR – that would enable trusted and compliant cross-border data flows. Such a framework could simplify compliance for AI companies while ensuring consistent privacy protections, clearer consent mechanisms, and data anonymisation standards. Participants emphasised the importance of aligning national rules while retaining space for local context and sovereignty.

Building Sustainable and Inclusive AI Infrastructure

Discussions centred on the energy intensity of AI workloads and the growing need for environmentally responsible infrastructure. As investors place greater emphasis on environmental, social, and governance (ESG) metrics, start-ups and infrastructure providers face pressure to improve operational efficiency. This raises a question about accountability: who bears the responsibility for sustainability? Data centre operators or AI model developers? Participants agreed on collective responsibility. Developers should focus on designing efficient

models that avoid overtraining or excessive data waste, while infrastructure providers must deploy greener technologies to minimise environment impact and carbon footprint, such as hot-water cooling and renewable power sources. The idea of establishing cost-effective, green data centres in energy-abundant locations, such as special economic zones, was proposed that could serve the region's sustainability objectives.

Participants discuss sustainable and inclusive AI infrastructure

Towards Regional Standards and AI Testbeds

Another theme was the need for shared regulatory standards and sandbox environments to encourage safe experimentation and enables scalability. Participants proposed establishing regionally coordinated testbeds where AI innovations could be piloted in a controlled but enabling regulatory environment. Having these platforms in place could support knowledge exchange and accelerate innovation without compromising safety. In addition to regulatory sandboxes, the importance of interoperable data-sharing frameworks and modular open-source tools was highlighted to avoid redundant development and ensure inclusive participation across the region.

Aligning AI Application with National Development Priorities

Aligning AI applications with national development goals was identified as an important success factor particularly in public sector collaboration. When start-ups present solutions that address government priorities – such as public health, education, or agricultural productivity in Indonesia – they are more likely to attract government interest, secure partnerships, and scale effectively. Conversely, innovations that fall outside of priority policy areas may struggle to gain traction. It is important to engage public-sector stakeholders early to better understand policy objectives and frame AI use cases to match public needs. Structured collaboration frameworks, including clear data classification systems (e.g., open, limited, confidential), were also cited as enablers of trust and responsible data access.

Regional Policy Developments

ASEAN has laid important groundwork through a suite of regional initiatives aimed at improving data governance, promoting interoperability, and supporting digital innovation. These frameworks signal ASEAN's growing commitment to building an integrated and trusted data ecosystem. However, the discussion underscored that implementation remains uneven. Accelerating uptake, especially amongst start-ups, will require more targeted capacity-building efforts, regulatory alignment, and simplified compliance mechanisms. Table 1 outlines practical guide and tools to help data practices and enable trusted cross-border flows in ASEAN.

Table 1. ASEAN Initiatives on Data Governance and Cross-Border Data Flows

Document	Year of Adoption	Description
ASEAN Framework on Personal Data Protection	2016	This framework aims to strengthen personal data protection and facilitate cooperation amongst AMS to support trade and information flow.
ASEAN Framework on Digital Data Governance	2018	This framework seeks to harmonise data regulations and promote intra-ASEAN data flows, recognising diverse maturity levels amongst AMS.
ASEAN Data Management Framework (DMF)	2021	The DMF provides a step-by-step guide for businesses, especially MSMEs, to implement data governance and safeguards.
Model Contractual Clauses for Cross Border Data Flows (MCCs)	2021	The MCCs offers standard legal terms to reduce compliance costs and protect personal data in cross-border transfers.
Implementing Guidelines for DMF and Cross Border Data Flows	2021	The guidelines support harmonised data standards and outline key approaches such as contractual clauses and certification.
ASEAN Guide on Data Anonymisation	2025	It is an introductory guide offering practical anonymisation techniques for AMS and supporting adaptation to national data protection laws.

Source: ASEAN, 2016, 2018, 2021a, 2021b, 2021c, 2025.

In the AI domain specifically, ASEAN has adopted the ASEAN Guide on AI Governance and Ethics and its Expanded Guide focusing on generative AI. Looking ahead, the ASEAN AI Safety Network is expected to serve as a platform for facilitating AI safety research, promoting the safe and responsible development and adoption of AI across sectors, and encouraging harmonisation and interoperability of AI safety standards amongst AMS. In parallel, sustainability is emerging as a strategic priority. A forthcoming ASEAN guide on sustainable data centre development will provide recommendations to help governments and service providers manage rising infrastructure demands while addressing environmental concerns – particularly around energy and water usage.

These regional efforts reflect ASEAN's ambition to create a future-ready AI ecosystem that is not only safe and scalable, but also rooted in trust, sustainability, and regional cohesion. Strengthening implementation, supporting interoperability, and ensuring that startups can navigate and benefit from these frameworks will be essential to unlocking the full potential of AI innovation across the region.

Session 2: Strategies to Improve ASEAN AI Talent Development and Retention

Fragmented Talent Pipelines and the Need for Regional Coordination

While the region benefits from a large population, participants noted that current efforts to develop AI talent and cultivate AI expertise in ASEAN require further consolidation and coordination. Some of the suggestions raised to improve regional coordination include the creation of an AI regional roadmap, the development of shared competencies and certifications, and greater collaboration amongst public, private, and academic institutions. These efforts would help build a talent pipeline not only equipped with technical capabilities but also entrepreneurial and leadership skills necessary for start-up success.

Moderator and panelists discuss regional strategies to develop and retain AI talent in ASEAN

Mission-Driven Startups as Talent Accelerators

Start-ups working on generative AI projects demonstrated how mission-driven initiatives can build local AI talent. A notable example is Kotoba Technologies which build speech-based generative AI models that break language barriers, especially for Japanese speakers.

Their early work included FugakuLLM, one of Japan's large language model projects. Although the project faced delays due to its reliance on CPU-based compute, it provided young engineers with experience in large-scale model training. Many alumni of the project now contribute to Japan's growing AI ecosystem – joining major tech firms, national labs, and start-ups.

Building on this experience, Kotoba now develops low-latency simultaneous speech translation, high-accuracy automatic speech recognition (ASR), and emotionally expressive speech synthesis, deployed in real-world settings like the NVIDIA AI Summit and through partnerships with companies such as Kokusai Denshin Denwa Inc (KDDI). These projects provide engineers with exposure to cutting-edge technologies, real-time deployment challenges, and product-oriented thinking.

This example illustrates the catalytic role of projects in growing skilled talent. Key enablers include public funding, access to compute resources, and a clear, motivating mission.

Speed of Iteration, Liquidity, and Knowledge Ecosystems as Enablers of AI Innovation

The discussion continued with a reflection on what sets global AI hubs like Silicon Valley apart – namely, the speed of iteration and the intensity of competition. In these ecosystems, the pace from concept to demonstration is fast, driven by investor expectations, technical ambition, and the presence of dense communities of experienced founders, engineers, and researchers.

However, it is not just speed of innovation that matters, but also the systemic enablers behind it. ASEAN still faces two challenges in attracting and retaining AI talent: a lack of liquidity and an underdeveloped knowledge ecosystem. Given these limitations, start-ups building open-source LLMs with multilingual capabilities often incorporate in the United States, where they can access more abundant growth-stage capital and specialised AI investors. Series B and C funding for AI ventures remains limited in ASEAN, with most venture capital still concentrated in sectors like fintech.

The second challenge is the absence of a critical mass of AI research institutions and developer communities in the region. Unlike the US or China, ASEAN lacks the concentrated networks of universities, research labs, and collaborative developer ecosystems that drive foundational AI research. For developers working on model development (as opposed to deployment), this presents a clear disadvantage. As a result, even top talent from ASEAN countries – including Singapore – is often 'overrepresented' in US-based AI research teams and companies.

Despite these constraints, emerging global dynamics may present ASEAN with an opportunity. Investor uncertainty in the US and rising academic restrictions have prompted growing interest in Southeast Asia as an alternative innovation base. This positions the region to benefit from international collaborations and knowledge flows.

To seize this moment, ASEAN must build a compelling regional value proposition for AI talent and firms. This includes expanding funding mechanisms for high-potential AI ventures, investing in research institutions and communities, and framing a strong regional agenda through binding instruments like DEFA. If ASEAN can act collectively, it can position itself not only as a site of implementation, but as a driver of AI innovation with global relevance.

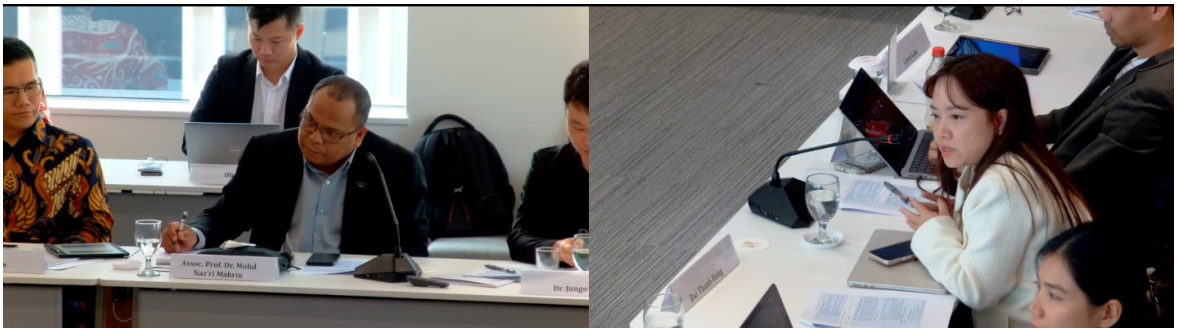
Malaysia's Integrated Approach to AI Talent, Education, and Start-up Development

In the case of Malaysia, building a thriving AI-driven startup ecosystem starts by placing talent development, industry integration, and investment support at the centre of its national agenda. The *Startup Ecosystem Roadmap 2021–2030* identifies talent as a key growth driver. It aims to cultivate tech-savvy graduates and start-up founders while closing gaps in funding, commercialisation, and inclusion

To meet these goals, Malaysia's investment in education and training includes RM50 million allocated for AI education, RM7.5 billion for Technical and Vocational Education and Training (TVET), and the establishment of the country's first Faculty of AI at Universiti Teknologi Malaysia (UTM). A National AI Office has also been launched to coordinate efforts and guide national priorities.

One initiative that was highlighted is UTM's industry-infused AI degree programme. Through this programme, students engage with real-world data and undertake long-term industry attachments, enhancing their technical skills, job-readiness, and adaptability. Cross-border student competitions and online platforms further support regional collaboration.

On the investment side, Malaysia's fund-of-funds model is designed to crowd in both government and private funding across the startup lifecycle. The *MyStartup* platform serves as a single window to consolidate public and private support and simplify access for founders and investors alike.



Participant engages in the discussion on Malaysia's approach to AI talent development and fund-of-funds investment for start-ups

Under its ASEAN Chairmanship 2025, Malaysia is also leading the region's efforts to promote the vibrant startup ecosystem in ASEAN. The *ASEAN Startup Initiative* aims to foster cross-border collaboration, and envisions a shared platform and potentially a regional fund-of-funds to enable co-investments across ASEAN and allowing startups to benefit from a broader pool of resources and market opportunities.

Cambodia's Experience in Building AI Talent

Discussions also highlighted Cambodia's experience in building local AI talent and digital innovation capacity. In 2014, Cambodia established the National Institute of Post, Telecom, and ICT (NIPTICT) to develop expertise in digital technology. Over the years, the institution evolved and expanded its role. In 2021, it became the Cambodia Academy of Digital Technology (CADT).

Recognising the need for stronger infrastructure, Cambodia launched its first Innovation Center at CADT. This was supported through the Capacity Building Research and Development (CBRD) fund, which mainly financed by the telecom operators in Cambodia. The Innovation Center provides training in fields such as AI, data science, and analytics, and benefits from international cooperation, including co-financing from the French government. This approach shows that with strong leadership, clear priorities, and targeted investment, countries can gradually build a robust ecosystem to nurture AI talent.

Aligning Regulations to Support AI Innovations

The discussion then turned to how ASEAN can harness international partnerships and policy frameworks to grow its AI talent and innovation ecosystem. A key question was how to move beyond being passive users of AI technologies toward becoming builders, researchers, and contributors to the global AI landscape. While ASEAN possesses significant human capital, the challenge lies in optimising this potential through supportive policies.

A central theme was the role of policy in shaping business environments for AI. Small businesses and start-ups are sensitive to cost structures. Even relatively modest regulatory requirements – such as mandatory data residency – can discourage expansion, as they raise operational costs and create barriers to market entry. This highlights the importance of designing policies that enable, rather than constrain innovation.

The discussion noted that for ASEAN, adopting non-binding guidelines and implementing regulatory sandboxes, risk-based frameworks, and improving policy coherence and regional coordination through the ASEAN Digital Economy Framework Agreement (DEFA) could create a supportive environment for startups. Such efforts would help the region stay competitive and retain talent while encouraging cross-border AI growth.

Open Discussion

Navigating the Paradox of Lean AI Start-ups and Mass Talent Supply

A concern was raised around the mismatch between the growing ability of AI startups to scale with small teams, and the region's efforts to expand AI talent supply particularly amongstst youths. It was noted that emerging AI companies, especially in generative AI, can achieve rapid revenue growth with minimal staff, disrupting assumptions about job creation. In this context, ASEAN faces a challenge: how to absorb a large, upskilled workforce when start-ups no longer require large operational teams.

This shift indicates that most AI-trained individuals will likely find roles in large enterprises and government agencies, rather than start-ups. It also underscores a broader trend: automation is shifting value creation from manpower to machine-led efficiency. As a result, the measure of success may soon rely less on headcount and more on AI fluency and strategic deployment.

This trend demonstrates the need for long-term thinking in ASEAN's AI talent development strategy that needs to be adaptive to support both immediate upskilling and deeper capacity building over time. It is therefore important to understand the needs of the region as a whole, and to have a better understanding of where countries and governments want to make a mark in AI. In addition, careful planning and action in how talent is trained, matched to opportunities, and retained will be important to navigating this shift effectively.

Workforce Development and Transformation in the Age of AI

The issue of workforce transition in digital transformation was discussed. Companies aiming to scale AI adoption for better productivity and efficiency will need to consider implications on employment when embracing automation. The accelerating adoption of AI tools in the workplace may not necessarily lead to job displacement, but a reconfiguration of roles, where individual contributors are increasingly being repositioned as managers of AI agents. While AI is likely to displace certain roles, it will also create new ones – particularly those requiring higher-order skills and interdisciplinary knowledge.

In line with this perspective, national roadmaps promote AI not as a replacement for humans but as a tool to augment jobs. With effective deployment, AI can streamline tasks, reduce inefficiencies, and open up new value-creating roles. The challenge lies in how organisations reassign labor, train staff for emerging functions, and build a culture of continuous learning.

Pixel ML's Experience in Empowering Non-Tech Users Through AI Agent Platforms

From the perspective of an emerging startup, Pixel ML shared its experience developing *Quick QR Art*, a platform that reached 1.5 million users in 2023 – built and scaled by a small team that leveraged AI across sales, marketing, and operations. This experience revealed that most non-tech people still struggle to integrate AI into real-world workflows.

In response, Pixel ML is building a platform AgenticFlow – The Operating System for Your AI Workforce. This platform enables individuals without engineering backgrounds to create AI agents, automate routine tasks, and manage multi-agent collaboration systems. While AI reduces manual labor, it doesn't eliminate the need for people – these systems still require human oversight, training, and iterative improvement.

This experience conveyed a message: AI does not replace people – it requires them to reskill. Current employees must be upskilled to apply AI tools effectively in their daily work, while students – regardless of discipline – must be equipped with practical, domain-relevant AI capabilities that go beyond basic usage of tools like ChatGPT. To help this capability gap, Pixel ML is looking for opportunities to work with schools, companies, and other partners to help close the AI skills gap and prepare people for the future of work.

Session 3: Navigating the AI Regulation and Investment Landscape

Good AI Governance, Procurement, and Adoption Starts with AI Literacy

Discussants stressed that effective AI regulation must begin with widespread AI literacy. It was noted that AI awareness remains concentrated in technical and policy circles, while understanding amongst students, workers, and investors remains limited across much of ASEAN. It was suggested that AI education, particularly in STEM fields, should be made mandatory to build foundational skills and awareness. Citing Viet Nam's STEM focus as a driver in its AI startup growth, and China's mandate for AI instruction in primary schools, the session called for similarly national strategies.

Panelists discuss AI literacy, governance, and public sector adoption strategies during Session 3 on Navigating the AI Regulation and Investment Landscape

Beyond youth and workforce training, AI literacy is also needed amongst investors. In ASEAN, most investors come from financial rather than technical backgrounds, which often leads to cautious or reactive investment behavior. Participants noted that many regional investors still lack familiarity with the fundamentals of AI and generative AI, making it difficult for them to evaluate emerging technologies or support promising start-ups. As many of AI start-ups in the region operate in B2B sectors, investors often struggle to assess technical differentiation or understand how new entrants compare to established players. Educating investors on the enterprise applications of AI was seen as necessary to unlocking new funding and supporting innovation at scale.

The role of public sector leadership in AI adoption was emphasised. Governments can catalyse adoption by becoming early users of AI, validating solutions, and setting responsible implementation standards. Canada's national AI procurement model was cited as a reference: led by Public Services and Procurement Canada (PSPC) and the Treasury Board Secretariat (TBS), the initiative pre-qualifies suppliers through an Invitation to Qualify process. This enables federal departments and agencies to access vetted AI vendors through a streamlined, trusted procurement pathway. Similar efforts are beginning to emerge in Southeast Asia, such as AI policy workshops in Viet Nam's parliament aimed at exploring government-startup collaborations for public sector use cases.

Finally, a challenge to implementation of AI governance and adoption strategies is the lack of centralised, accessible information. The session noted that resources such as grants, procurement opportunities, training programmes, and centres of excellence are scattered and difficult to find. Without a clear entry point, both start-ups and adopters face barriers in navigating the ecosystem. To address this, participants proposed creating an open-source platform to consolidate relevant support mechanisms and enable easier collaboration. Such a platform could improve transparency, reduce duplication, and accelerate adoption across the region.

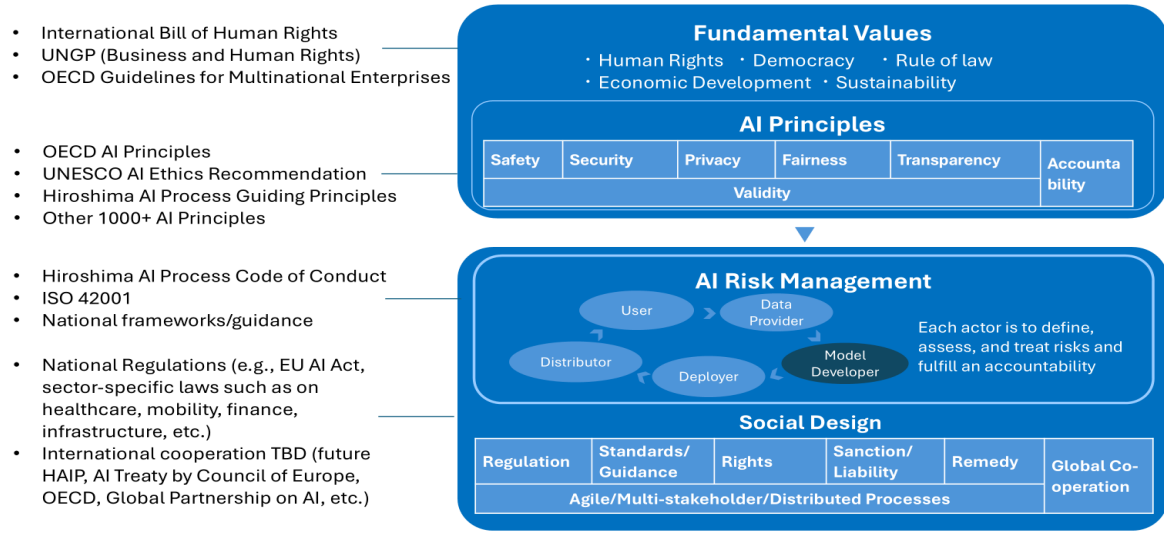
Balancing Regulation and Innovation

The discussion highlighted the need to strike a balance between innovation and regulatory safeguards. While effective regulation builds public trust, overly strict or fragmented policies risk limiting start-ups from scaling across ASEAN. Given the region's diverse legal systems, full regulatory harmonisation is unlikely in the short term. Instead, the focus should be on greater transparency, mutual recognition, and interoperable practices.

This mirrors global trends in AI governance. Since the mid-2010s, growing concerns around safety, bias, and misinformation have prompted the introduction of principles-based frameworks grounded in values like human rights, democracy, and sustainability. These soft law approaches are shaping national and international standards.

Figure 2 outlines how fundamental values inform AI principles, risk management tools, and governance mechanisms. It also underscores the importance of shared responsibility – governments, businesses, and other actors must work together to align AI with ethical and legal standards.

Figure 2. Structure of AI Governance and Key Documents



Source: Habuka and Socol de la Osa, 2024.

As general-purpose AI tools become more prevalent, regulatory systems must remain flexible and collaborative. For ASEAN, aligning with international norms and focusing on high-risk applications can help build a resilient and trusted regional AI ecosystem that promotes innovation while managing risk effectively.

Strengthening the Investment Environment Through Education and Demand Creation

The discussion turned to how investors can strengthen ASEAN's AI ecosystem. It was noted that traditional high-risk, high-return models are less effective in the region due to limited exit pathways. Instead, panelists called for more hands-on investment strategies focused on long-term value creation.

An issue raised was the lack of AI literacy amongst regional investors, who often come from financial – not technical – backgrounds. This leads to cautious, reactive investment behavior. Educating investors on AI's real-world applications, especially for enterprise use, was seen as necessary to unlock new funding.

Start-ups also face challenges, particularly in scaling and enterprise engagement. In response, some investors are taking active roles – coaching founders, connecting them with enterprises, and supporting proof-of-concept (POC) pilots. One initiative pairs start-ups with enterprise needs and supports them through an 'AI-as-a-service' programme to speed up implementation.

New funding models are also emerging, such as deal-based investments triggered by signed enterprise agreements. Governments were encouraged to expand and promote POC funding schemes to help start-ups access real business opportunities and grow more sustainably.

Open Discussion

Scaling Public-Impact AI Requires Sectoral Buy-In and Institutional Integration

The experience of TOY EIGHT highlights that AI solutions targeting public challenges cannot scale through technology alone. TOY EIGHT developed TOY8, a developmental screening tool designed to identify early learning and developmental needs in children aged 3–5 years. The tool reimagines conventional face-to-face assessments as a smartphone-based game, using familiar materials such as stacking blocks, drawing pens, and on-screen characters to guide the child through engaging tasks. Designed for ease of use, it allows parents and educators to detect potential concerns, even in the absence of trained specialists.

For TOY EIGHT's case, its development screening tool operates at the intersection of education and healthcare. The panelist noted that in many ASEAN countries, developmental delays are diagnosed by healthcare professionals, but follow-up support is delivered by educators, creating gaps in continuity and accountability. TOY EIGHT addressed this challenge by actively engaging the right stakeholders. It partnered with Malaysia's Ministry of Health and public research institutions to validate the tool's accuracy through clinical studies. TOY EIGHT's case demonstrates that sectoral buy-in is necessary for AI solutions in public interest domains. Government support must extend beyond simple procurement; it requires structural alignment across agencies, trust from professionals, and a shared willingness to embed AI tools into existing service delivery models.

Scaling Through Market-Driven Expansion and Strategic Partnerships

FathomX shared its experience in scaling breast cancer detection solutions. It is noted that regulatory complexity and limited fundraising opportunities in the region can threaten start-up survival. Instead of waiting for regulatory clarity, the company prioritised commercial deployment by targeting real market gaps and validating its solution through clinical partnerships. This approach, driven by market traction, has helped attract both regulatory approvals and investor interest.

Session 3 panelists (left) and participants (right) engage in open discussion on market-driven expansion strategies and regulatory navigation for ASEAN AI start-ups

The discussion also highlighted the importance of not limiting one's ambitions to ASEAN, as global competitors, especially from the US and Europe, are well-resourced and fast-moving. Building validation networks, engaging key opinion leaders, and establishing partnerships in advanced markets were cited as strategies to stay competitive. Ultimately, startups were urged to focus on business viability, execution speed, and value proposition, rather than relying solely on regulatory environments.

Efforts to Address the Intersectionality of Digital Trade, Data Flows and AI Governance

The need for regional alignment and stronger ASEAN cooperation was highlighted as fragmented national regulatory approaches in these three important areas make it difficult for AI startups to operate and scale regionally. Efforts such as the ASEAN AI Safety Network and DEFA, ASEAN Guide on AI Governance and Ethics and its expanded guide on generative AI were also seen as significant in fostering trust, collaboration, and regional standardisation. The creation of common frameworks and interoperable rules would allow AI innovations to travel across borders while respecting national legal systems.

Discussion also touched on limited attention given to international digital trade and cross-border data governance as important areas for supporting AI development, deployment, and regional scaling. While AI-related investments in ASEAN are growing, restrictive data policies continue to hinder the flow of data, computing resources, and talent. This fragmentation limits the ability of start-ups to build AI solutions at the regional level and constrains opportunities for cross-border collaboration. Evidently, restrictive data policies could reduce global GDP and trade, while more balanced frameworks, such as those aligned with the concept of Data Free Flow with Trust (DFFT), could deliver tangible economic benefits. In this context, DEFA was viewed as a timely opportunity to integrate digital trade and data mobility into AI governance.

Wrap-up and Closing Remarks

Dr Aladdin D. Rillo

'In this age of AI, it is not only about disruption, but also about transformation. Start-ups must deliver new value, and for that, they need a stronger ecosystem built on infrastructure, open data, talent, and sound regulation.'

In his closing remarks, Dr Aladdin D. Rillo reflected on the rich insights shared throughout the Second ASEAN Start-up Roundtable and emphasised the need for continued, structured collaboration to realise the full potential of AI-driven innovation in ASEAN.

Dr Rillo underscored that artificial intelligence is already reshaping the region's innovation landscape. From niche solutions in vertical industries to new service models, AI-driven start-ups are emerging as engines of economic and sustainable development. Yet, he cautioned that innovation alone is not enough. Structural challenges, ranging from infrastructure and talent gaps to fragmented regulatory environments, must be addressed through more coordinated public and private interventions.

Dr Rillo highlighted key takeaways from each session of the roundtable. The first session revealed that access to data and computing infrastructure remains highly uneven across the region, with smaller AI start-ups disadvantaged compared to large firms. The second session brought attention to the fragmented state of AI talent development in ASEAN, shaped by varying national education systems and economic structures. The third session, on governance, highlighted that while AI regulation is necessary to manage risks, start-ups must be supported to navigate complex compliance environments without stifling innovation.

He called for stronger multi-stakeholder partnerships to address these cross-cutting issues, involving not only governments and industry but also academia, think tanks, and civil society. Dr Rillo reaffirmed that AI must also be treated as a regional public good, with policy, investment, and research aligned to ensure inclusive and transformative outcomes.

Concluding his remarks, he expressed appreciation to all participants and acknowledged the organising team behind the roundtable. He ended with a hopeful message that the discussions held during the event would continue to inspire concrete action across ASEAN to ensure that AI is not merely a technological hype, but also a source of real impact for the region.

Jakarta Start-up Ecosystem Site Visit

GoTo's AI Innovation and Adoption Through the Sahabat–AI Large Language Model

As part of the Second ASEAN Startup Roundtable, participants had the opportunity to visit the first company destination of the Jakarta Startup Ecosystem Site Visit Program: PT GoTo Gojek Tokopedia Tbk, known as GoTo. GoTo is a holding company operating in Indonesia and Singapore, with over 3 million driver-partners and over 5.3 million merchants. It contributed IDR 392 trillion to Indonesia's GDP in 2023 (LPEM FEB UI, 2024). Its services include mobility, delivery, payments, financial services, and technology solutions for merchants. The ecosystem also provides e-commerce services through Tokopedia and banking services through its partnership with Bank Jago.

During the site visit, participants received an introduction to GoTo's diverse services, solutions, and their impact on merchants, driver-partners, and society at large as well as its sustainability goals to achieve Zero emissions, Zero waste, and Zero barriers by 2030, as explained by Ms Josefhine Chitra, Head of Corporate Communications at GoTo. Additionally, Mr Henky Prihatna, Head of Partnerships at GoTo, discussed the company's innovative approach to adopting AI technology and solutions.

One of GoTo's flagship AI initiatives is Sahabat–AI, launched in November 2024. Developed by GoTo in collaboration with PT Indosat Ooredoo Hutchison Tbk, Sahabat–AI is an open-source Large Language Model (LLM) specifically designed for the Indonesian language and regional languages in Indonesia. Sahabat–AI exemplifies GoTo's commitment to advancing technological innovation that empowers all Indonesians. The LLM addresses a gap left by global AI platforms, which often lack local context and cultural relevance.

The uniqueness of Sahabat–AI lies in its deep localisation, setting it apart from global LLMs. Tailored for the Indonesian language and its various regional languages such as Javanese and Sundanese, the model offers an in-depth understanding of local context and cultural nuances. This localisation promotes AI inclusivity and supports digital literacy across the country.

Aligned with GoTo's mission to **'empower progress'**, Sahabat–AI has been intentionally developed as an open-source ecosystem. This allows local developers and engineers broad access to create AI-based solutions tailored to diverse needs, including public services, customer service, data analytics, research and development, education, and business growth. GoTo has also partnered with Indonesian universities and media companies to support knowledge-sharing, data cleaning, and validation – all crucial for fine-tuning the Sahabat–AI LLM parameters. As part of these partnerships, GoTo collaborates with local universities such as the University of Gadjah Mada to provide AI education and hands-on opportunities to train the Sahabat–AI model.

One specific application of Sahabat–AI within GoTo's ecosystem is the Dikte Suara (Dira) or voice assistant feature, which enhances user experience by enabling easier navigation of GoPay, GoTo's e-wallet platform, and faster task completion through voice commands in Indonesian. This feature demonstrates how AI can improve accessibility and efficiency for users.

Mr Henky Prihatna, Head of Partnerships at GoTo (Left), Mr Naoto Okura, Director General for Research and Policy Design at ERIA (Centre), Ms Josefhine Chitra Head of Corporate Communications at GoTo exchanging tokens of appreciation

Overall, the site visit to GoTo provided insights into how tech companies in ASEAN can drive innovation by collaborating with various stakeholders – such as governments, media, educational institutions, and telecommunications companies – to develop localised AI solutions that serve the public and foster digital inclusivity.

Enhancing Customer Experience through AI-Powered Features at Traveloka

The Jakarta Startup Ecosystem Site Visit Participants at The Traveloka Campus

The second destination of the site visit was Traveloka, Southeast Asia's leading all-in-one travel platform connecting millions globally with trusted, world-class experiences. The session emphasises AI's role in personalising user experiences, optimising pricing, and enhancing customer service. The visit focused on how Traveloka leverages AI to elevate customer experience and drive innovation in the travel tech sector.

The session began with a participant visiting the Traveloka Campus office in BSD City. The use of the term *'Campus'* reflects Traveloka's commitment to fostering a culture of continuous learning and innovation within the workplace. This philosophy is aligned with their broader mission to deliver exceptional and personalised experiences to travelers globally.

Traveloka's AI and Machine Learning tech team led the session and shared key initiatives and the practical impact of Traveloka's AI-powered solutions. One of the flagship features discussed was the Traveloka Travel Expert, a virtual travel consultant that curates complete holiday packages with standardised quality. These packages are tailored to individual user preferences, prioritising comfort, convenience, and overall enjoyment. This feature is part of Traveloka 5.0, a major platform upgrade launched in 2024 (Traveloka, 2024).

Traveloka's AI applications also include smart search features and personalised travel recommendations, which are designed to streamline the user journey and enhance satisfaction from the discovery stage to post-travel activities. By integrating machine learning algorithms and behavioral data, these features enable a seamless and intuitive booking experience. In

addition, Traveloka leverages AI to enhance customer service by automating responses to customer inquiries in local languages, as well as synthesising user feedback to better support customer care agents in resolving issues efficiently.

This site visit offered participants insights into the strategic role of AI in shaping customer-centric products. The session reinforced the importance of embedding AI technologies to enhance user experience, promote long-term customer loyalty, and support sustainable business growth in the highly competitive travel and hospitality sector.

Exploring Living Lab Ventures' Value Creation Programme and AI Integration within the Sinar Mas Land Ecosystem

The third session of the Jakarta Startup Ecosystem Visit brought together roundtable participants, the Living Lab Ventures (LLV) team, and representatives from Sinar Mas Land to explore the adoption and application of AI within the Sinar Mas Land ecosystem. Living Lab Ventures itself is an investment arm and innovation platform of Sinar Mas Land, which is known to be a leading developer and real estate company under the Sinar Mas Group.

Bayu Seto (Partner at Living Lab Ventures) explains the Living Lab Ventures' support for the start-up ecosystem

During the session, Mr Bayu Seto, Partner at Living Lab Ventures, introduced the LLV's core initiatives, investment thesis, and support mechanisms for start-ups. He emphasised LLV's flagship programme, LLV Innolab, which serves as a catalyst for impactful collaboration between start-ups and corporations. By leveraging the extensive Sinar Mas Land ecosystem, particularly BSD City, LLV enables startups to pilot and scale innovative, real-world solutions, including those based on AI technologies.

Following this, Mr Darwin Poso, Vice President of Enterprise Data Management at Sinar Mas Land, presented the company's strategic AI initiatives aimed at transforming its smart city infrastructure and enhancing customer experiences. He outlined three key applications:

1. AI-Powered Auto Classification for Customer Service: Utilising generative AI, Sinar Mas Land has developed a conversation dashboard that automatically classifies incoming inquiries and feedback based on priority. This system enhances customer support by improving response efficiency, streamlining workflows, and increasing customer satisfaction.
2. AI Text Extraction for Automated Data Collection: Integrated with tools like ChatGPT and Document Intelligent, this AI solution accurately extracts and interprets data from complex documents, such as legal forms and personal identification cards. The automation reduces manual errors and increases operational efficiency in document processing and management.
3. Social Media Sentiment Analysis: Leveraging generative AI, Sinar Mas Land analyses public sentiment in real time across social media platforms. This capability supports improved brand perception, agile marketing decisions, and a deeper understanding of customer needs.

This session provided participants with insights into how venture capital, corporates, and start-ups can collaborate to build a smart city ecosystem where AI solutions drive innovation across multiple domains. The integration of AI in urban planning, customer service, and data management illustrates a forward-thinking approach to technology-driven urban development.

Designing AI Solutions for the Clinical & Healthcare Sector – Lessons from Science Techno Park, University of Indonesia

The Jakarta Startup Ecosystem Site Visit concluded with a visit to Science Techno Park, University of Indonesia (STP UI), one of four leading science and technology parks officially designated by the Indonesian government that play a pivotal role in strengthening the country's national research and innovation infrastructure.

During the visit, participants attended a guest lecture by Mr Muhammad Febrian Rachmadi, Ph.D., a faculty member from the Faculty of Computer Science, University of Indonesia. His session focused on designing AI solutions for the clinical and healthcare sectors.

Dr Muhammad Febrian Rachmadi, Ph.D., shares best practices for designing and transforming AI ideas into meaningful products

Dr Febrian highlighted the critical importance of understanding the real-world context before developing AI-based healthcare solutions. He emphasised that engineers, startup founders, and relevant stakeholders must first gain a deep understanding of patients' needs, healthcare regulations, and user journey flows. This foundational knowledge is essential to ensure ethical compliance, practical feasibility, and product-market fit for any AI application in the clinical domain. He also shared the need for integration and innovation in AI research to scale products and drive meaningful impact.

A key takeaway from the session was the necessity to tailor AI solutions based on the clinical severity of the condition being addressed. For instance, certain symptoms or health conditions may be too complex or sensitive to rely solely on AI-driven diagnostics without the complementary insights of qualified medical personnel. Dr Febrian stressed that AI should complement, not replace, medical professionals, ensuring both ethical responsibility and enhanced impact in clinical decision-making.

Ms Jihan Alfi, Co-Founder of Herlens, presents the AI-Powered cervical cancer diagnostics application

The session concluded with a start-up pitch by Ms Jihan Alfi, Co-founder of Herlens, a start-up focused on cervical cancer diagnostics. Herlens exemplifies how startups can harness AI technology to make meaningful contributions to public health while navigating regulatory and clinical complexities.

This site visit to STP UI offered insights into the role of AI in the healthcare sector while highlighting AI applications in medicine, emphasising the need for clinical integration and regulatory compliance, best practices for designing and implementing AI solutions, and showcasing the startup ecosystem and collaborative innovation facilitated by STP UI.

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List of Participants

Speakers and Panelists

Name	Organisation
Professor Yutaka Matsuo	The University of Tokyo, Japan
H.E. Kan Channmeta	Ministry of Industry, Science, Technology, and Innovation, Cambodia
Ajar Edi	PT. Indosat Tbk, Indonesia
Dr Ryousei Takano	National Institute of Advanced Industrial Science and Technology (AIST), Japan
Dr Rutchanee Gullayanon	King Mongkut's Institute of Technology Ladkrabang, Thailand
Dr Mohd Naz'ri Mahrin	Universiti Teknologi Malaysia
Gareth Tan	Coalition for Digital Prosperity for Asia (DPA), Singapore
Dr Jungo Kasai	Kotoba Technologies, Japan
Kai Yong Kang	GenAI Fund, Viet Nam
Masaki Ishibashi	TOY EIGHT, Malaysia
Calvin Woo Yoong Shen	Malaysia Centre for Fourth Industrial Revolution
Takafumi Ochiai	Atsumi & Sakai, Japan

Moderators

Name	Organisation
Timothy Yap	McKinsey, Singapore
Hiroshi Ishikawa	ERIA (Economic Research Institute for ASEAN and East Asia), Indonesia
Michelle Alarcon	President of Analytics and AI Association of the Philippines
Vivek Lath	McKinsey, Singapore

Agenda of the Roundtable

Day 1: Roundtable Session – 28 April 2025	
08:30 – 09:00	Registration and Coffee Chat
09:00 – 09:10	Welcome Remarks • H.E. Tetsuya Watanabe, President, ERIA
09:10 – 09:15	Group Photo
09:15 – 10:05	Keynote Presentation: • Professor Yutaka Matsuo, Senior Advisor and Professor at the University of Tokyo **Moderator:** Timothy Yap, Partner, McKinsey & Company
10:05 – 10-30	Coffee Break
10:30 – 11:30	Session 1: Strengthening AI Infrastructure and Data Ecosystems for ASEAN Start-ups This session will identify actionable strategies to strengthen AI-enabling infrastructure across ASEAN, ensuring equitable access to data and computing resources for start-ups. Participants will gain insights into leveraging local and regional initiatives to enhance data governance, connectivity, and infrastructure development. The discussion will also highlight innovative solutions to reduce costs and support start-ups in overcoming infrastructure challenges. Key questions to be discussed include: • How to address the need for reliable and affordable high-speed internet to enable start-ups to access AI tools and services? • What is the importance of data centres and how to improve data access and enhance AI capabilities by start-ups? • How to explore the potential solutions to offer cost-effective cloud services to ASEAN start-ups? What is the role of regulation? **Moderator:** Hiroshi Ishikawa, Special Advisor to the President on Digital Innovation, Research Fellow, ERIA

10:30 – 11:30	Speakers: • Ajar Edi, Senior Vice President, Government Affairs, PT. Indosat Tbk • Adiyan Mujibiya, Vice President of Preferred AI Products, Preferred Networks, Japan • Dr Ryousei Takano, Deputy Leader at National Institute of Advanced Industrial Science and Technology (AIST) • Assistant Professor Dr Rutchanee Gullayanon, Executive Vice President for Research and Innovations, King Mongkut's Institute of Technology Ladkrabang, Thailand
11:30 – 12:00	Q&A and Open Discussion
12:00 – 14:00	Lunch
14:00 – 15:00	**Session 2: Strategies to Improve ASEAN AI Talent Development and Retention for Startups** This session will investigate strategies and highlight key initiatives for developing and retaining a skilled workforce to leverage AI technology successfully for startups. Despite ASEAN's advantage of a young and dynamic demographic, AI-driven startups in the region face a significant challenge: the high demand for skilled AI professionals far outpaces the available supply. Differences in education quality and AI expertise across ASEAN member states exacerbate the problem, leading to fierce competition amongst companies to attract and retain talent. This not only drives up salaries, but also makes it difficult for early-stage startups to compete for talent with larger and more established firms. Key questions to be discussed include: • How can ASEAN fully capitalise its young and tech-savvy demography to maximise the potential of AI technology? • What strategies should be implemented to retain and reskill AI talent while addressing the financial constraints faced by emerging AI startups? • What investments are necessary to bridge the talent gap and cultivate a resilient and inclusive AI ecosystem for startups in ASEAN? **Moderator:** Michelle Alarcon, President of Analytics and AI Association of the Philippines

	Speakers: • Assoc. Prof. Dr Mohd Naz'ri Mahrin, Dean for Faculty of Artificial Intelligence (FAI), Universiti Teknologi Malaysia • Gareth Tan, Senior Associate Director and Technology Team Lead (Southeast Asia), APCO Worldwide and Regional Lead (Asia-Pacific), Digital Prosperity for Asia Coalition • H.E. Kan Channmeta, Secretary of State, Ministry of Industry, Science, Technology, and Innovation, Cambodia • Dr Jungo Kasai, Chief Technology Officer and Co-Founder, Kotoba Technologies, Japan
15:00 – 15:30	Q&A and Open Discussion
15:30 – 16:00	Coffee Break
16:00 – 17:00	Session 3: Navigating the AI Regulation and Investment Landscape This session will provide a recommendation for harmonising AI regulations across ASEAN, fostering a conducive investment environment, and promoting impact-driven innovation. Participants will gain insights into how collaborations between startups and investors can drive growth and align investments with broader socio-economic goals. The discussion will emphasise the importance of balancing innovation with responsible governance to ensure that startups can thrive in a competitive ecosystem. Key questions to be discussed include: • What is the best approach to AI regulation in ASEAN and its implications for growth of innovative start-ups and regional competitiveness? • What actionable steps are needed to streamline investment processes and reduce barriers for early-stage startups? How can investors prioritise market potential, scalability, and sector-specific applications to encourage the growth of tech startups? • How partnerships between AI startups and investors can drive innovation, and showcase successful collaborations that support AI startups with funding? Moderator: Vivek Lath, Partner, McKinsey & Company Speakers: • Kai Yong Kang, Partner at GenAI Fund • Masaki Ishibashi, CEO and Co-founder of TOY EIGHT • Calvin Woo Yoong Shen, Director, MyDIGITAL, Malaysia • Takafumi Ochiai, Head of Policy Research Institute and Senior Partner of Atsumi & Sakai
17:00 – 17:30	Q&A and Open Discussion

17:30 – 18:00	Wrap up and Closing Session • Dr Aladdin D Rillo, Managing Director for Policy Design and Operations, ERIA
18:00 – 20:00	Dinner Reception Hosted by ERIA
Day 2: Jakarta Startup Ecosystem Site Visit - 29 April 2025 ***Agenda & target location are subject to be confirmed by the counterparts and change without prior notice. Confirmation of the actual agenda will be provided.**	
08.30	Participants Registration • Meeting point: Fairmont Hotel
08.30 – 9.30	Travel to GoTo Office
9.30 – 10.30	Site Visit: GoTo Office • Welcome and Introduction about GoTo • Presentation about GoTo's AI innovation, adoption, and Sahabat.ai project • Q&A session with GoTo representatives
10.30 – 11.30	Travel to Traveloka Campus
11.30 – 12.30	Site Visit: Traveloka Campus • Welcome and Introduction to Traveloka • Discussion with Traveloka about the adoption of AI innovation and how to drive AI talent in the company • Q&A session with Traveloka representatives
12.30 - 12.40	Travel to Lunch Location
12.40 – 14.30	Lunch & Introduction of Living Lab Ventures: Bebek Bengil Restaurant • Welcome and Introduction of Living Lab Ventures • Living Lab Ventures' initiative to support AI innovation through investment and venture build pojects.
14.30 – 15.45	Travel to Universitas Indonesia
15.45 – 17.15	Site Visit: Universitas Indonesia • Welcome and Introduction of Universitas Indonesia • Presentation and discussion on Universitas Indonesia's AI related activities
17.15 – 18.45	Travel to ERIA office

This report presents the proceedings of the Second ASEAN Start-up Roundtable, organised by the ERIA Digital Innovation and Sustainable Economy Centre (E-DISC) in Jakarta on 28–29 April 2025. The Roundtable brought together government officials, industry experts, AI-driven start-up representatives from ASEAN Member States, academia, and international organisations to strengthen dialogue, exchange practical insights, and develop concrete recommendations for advancing the region's AI ecosystem.

ASEAN is emerging as a fast-growing hub for AI adoption and investment, with applications spanning agriculture, healthcare, logistics, and financial services. However, persistent challenges remain, including limited infrastructure, uneven digital talent pipelines, regulatory fragmentation, and financing gaps for start-ups.

To address these issues, the Roundtable featured a keynote presentation on the frontiers of generative AI and ecosystem models, followed by three thematic panel sessions. The first session on infrastructure and data ecosystems underscored the need for cost-effective, sustainable AI infrastructure and stronger regional data collaboration. The second session on talent development highlighted inclusive AI education and entrepreneurial pathways. The third session on regulation and investment emphasised balanced governance frameworks and strategies to mobilise capital for AI start-ups. A Jakarta start-up ecosystem site visit complemented these discussions, showcasing local AI innovations in commerce, travel, smart cities, and healthcare.

The Roundtable concluded with actionable recommendations to foster an inclusive, sustainable, and competitive AI ecosystem in ASEAN – emphasising regional collaboration, scalability, and innovation. It marked a significant step toward shaping the future of AI-driven start-ups in the region.

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