

Name	Area	Claim type	TR	SG	TR	MY	TR	TH	TR	ID	TR	KR
Headline economic value	Cloud's economic impact	Modelling		In 2025 we estimate that the wider innovation and productivity impact of the Google Cloud region has added S\$ 12 billion (US\$ 9.2 billion) in economic value to Singapore, equivalent to 1.5% of GDP, and supported an average of 44,000 jobs per year.		Over the next five years, we estimate that the wider innovation and productivity impact of the Google Cloud region will add a cumulative MYR 130 billion (US\$ 31 billion) in economic value to Malaysia. On average each year, this is equivalent to 0.97% of GDP and supports around 120,000 jobs.		Over the next five years, we estimate that the wider innovation and productivity impact of the Google Cloud region will add a cumulative THB 1.4 trillion (US\$ 43 billion) in economic value to Thailand. On average each year, this is equivalent to 1.4% of GDP and supports around 244,000 jobs.		In 2025 we estimate that the wider innovation and productivity impact of the Google Cloud region has added IDR 200 trillion (US\$ 12 billion) in economic value to Indonesia, equivalent to 0.9% of GDP, and supported an average of 246,000 jobs per year.		In 2025 we estimate that the wider innovation and productivity impact of the Google Cloud region has added KRW 14 trillion (US\$ 9.9 billion) in economic value to Korea, equivalent to 0.5% of GDP, and supported an average of 84,000 jobs per year.
Public sector potential from cloud	Cloud's economic impact	Modelling		In total we estimate that the wider innovation and productivity impact of cloud and AI can boost the productivity of the public sector by 6.6% in Singapore. This is equivalent to a saving of 2.5 hours a week per public sector worker, or 26 million hours a year across the public sector.		In total we estimate that the wider innovation and productivity impact of cloud and AI can boost the productivity of the public sector by 5.7% in Malaysia. This is equivalent to a saving of 1.4 hours a week per public sector worker, or 95 million hours a year across the public sector.		In total we estimate that the wider innovation and productivity impact of cloud and AI can boost the productivity of the public sector by 4.7% in Thailand. This is equivalent to a saving of 1.4 hours a week per public sector worker, or 140 million hours a year across the public sector.		In total we estimate that the wider innovation and productivity impact of cloud and AI can boost the productivity of the public sector by 4% in Indonesia. This is equivalent to a saving of 1.1 hours a week per public sector worker, or 350 million hours a year across the public sector.		In total we estimate that the wider innovation and productivity impact of cloud and AI can boost the productivity of the public sector by 5.8% in Korea. This is equivalent to a saving of 2 hours a week per public sector worker, or 210 million hours a year across the public sector.
Workspace adoption	From Consumer to Enterprise	Polling		73% of AI users at work told us that experimenting with AI tools in their personal lives had given them more confidence to use them in the workplace		82% of AI users at work told us that experimenting with AI tools in their personal lives had given them more confidence to use them in the workplace		86% of AI users at work told us that experimenting with AI tools in their personal lives had given them more confidence to use them in the workplace		71% of AI users at work told us that experimenting with AI tools in their personal lives had given them more confidence to use them in the workplace		69% of AI users at work told us that experimenting with AI tools in their personal lives had given them more confidence to use them in the workplace
ROI of Customer Experience AI Agents	Agentic AI	Modelling		On average, we estimate that companies investing in customer experience AI agents could see an ROI of 8.2x		On average, we estimate that companies investing in customer experience AI agents could see an ROI of 2.9x		On average, we estimate that companies investing in customer experience AI agents could see an ROI of 3.3x		On average, we estimate that companies investing in customer experience AI agents could see an ROI of 1.2x		On average, we estimate that companies investing in customer engagement AI agents could see an ROI of 7.2x
ROI of Business Development AI Agents	Agentic AI	Modelling		On average, we estimate that companies investing in business development AI agents (tools that automate tasks such as lead qualification, outreach, and forecasting) could see an ROI of 9.6x		On average, we estimate that companies investing in business development AI agents (tools that automate tasks such as lead qualification, outreach, and forecasting) could see an ROI of 3.5x		On average, we estimate that companies investing in business development AI agents (tools that automate tasks such as lead qualification, outreach, and forecasting) could see an ROI of 2.6x		On average, we estimate that companies investing in business development AI agents (tools that automate tasks such as lead qualification, outreach, and forecasting) could see an ROI of 1.3x		On average, we estimate that companies investing in sales AI agents (tools that automate tasks such as lead qualification, outreach, and forecasting) could see an ROI of 9.3x
ROI of Business Intelligence AI Agents	Agentic AI	Modelling		On average, we estimate that companies investing in business intelligence AI agents could see an ROI of 10.3x		On average, we estimate that companies investing in business intelligence AI agents could see an ROI of 2.5x		On average, we estimate that companies investing in business intelligence AI agents could see an ROI of 2.6x		On average, we estimate that companies investing in business intelligence AI agents could see an ROI of 1.6x		On average, we estimate that companies investing in business intelligence AI agents could see an ROI of 8.5x
Cost reduction	Full Stack Advantage	Modelling		In total, we estimate using Google's integrated cloud and AI stack can save developers up to 28% of their average annual costs in cloud and software infrastructure.		In total, we estimate using Google's integrated cloud and AI stack can save developers up to 28% of their average annual costs in cloud and software infrastructure.		In total, we estimate using Google's integrated cloud and AI stack can save developers up to 28% of their average annual costs in cloud and software infrastructure.		In total, we estimate using Google's integrated cloud and AI stack can save developers up to 28% of their average annual costs in cloud and software infrastructure.		In total, we estimate using Google's integrated cloud and AI stack can save developers up to 28% of their average annual costs in cloud and software infrastructure.
Faster deployment	Full Stack Advantage	Modelling		In total, we estimate using Google's integrated cloud and AI stack can speed up the time to develop a new feature by up to 22%		In total, we estimate using Google's integrated cloud and AI stack can speed up the time to develop a new feature by up to 22%		In total, we estimate using Google's integrated cloud and AI stack can speed up the time to develop a new feature by up to 22%		In total, we estimate using Google's integrated cloud and AI stack can speed up the time to develop a new feature by up to 22%		In total, we estimate using Google's integrated cloud and AI stack can speed up the time to develop a new feature by up to 22%
Secure by default cybersecurity	Full Stack Advantage	Modelling		We estimate that moving to a secure by default cloud stack such as Google Cloud can help reduce the risk of suffering a cybersecurity incident by up to 18%		We estimate that moving to a secure by default cloud stack such as Google Cloud can help reduce the risk of suffering a cybersecurity incident by up to 18%		We estimate that moving to a secure by default cloud stack such as Google Cloud can help reduce the risk of suffering a cybersecurity incident by up to 18%		We estimate that moving to a secure by default cloud stack such as Google Cloud can help reduce the risk of suffering a cybersecurity incident by up to 18%		We estimate that moving to a secure by default cloud stack such as Google Cloud can help reduce the risk of suffering a cybersecurity incident by up to 18%

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AI productivity gains from cloud services with sovereignty controls	Sovereignty	Modelling		42% of the potential AI productivity gains in highly regulated sectors depend on access to cloud services with sovereignty controls		37% of the potential AI productivity gains in highly regulated sectors depend on access to cloud services with sovereignty controls		40% of the potential AI productivity gains in highly regulated sectors depend on access to cloud services with sovereignty controls		39% of the potential AI productivity gains in highly regulated sectors depend on access to cloud services with sovereignty controls		43% of potential AI productivity gains in highly regulated sectors depend on access to cloud services that meet data residency and sovereignty requirements.
Potential increase in compute demand	Sovereignty	Modelling		Over the next five years, total compute to support AI and cloud workflows in Singapore could increase by a projected 158%		Over the next five years, total compute to support AI and cloud workflows in Malaysia could increase by a projected 169%		Over the next five years, total compute to support AI and cloud workflows in Thailand could increase by a projected 163%		Over the next five years, total compute to support AI and cloud workflows in Indonesia could increase by a projected 181%		Over the next five years, the total TPU and GPU compute capacity needed to support AI and cloud workloads in Korea could increase by a projected 159%