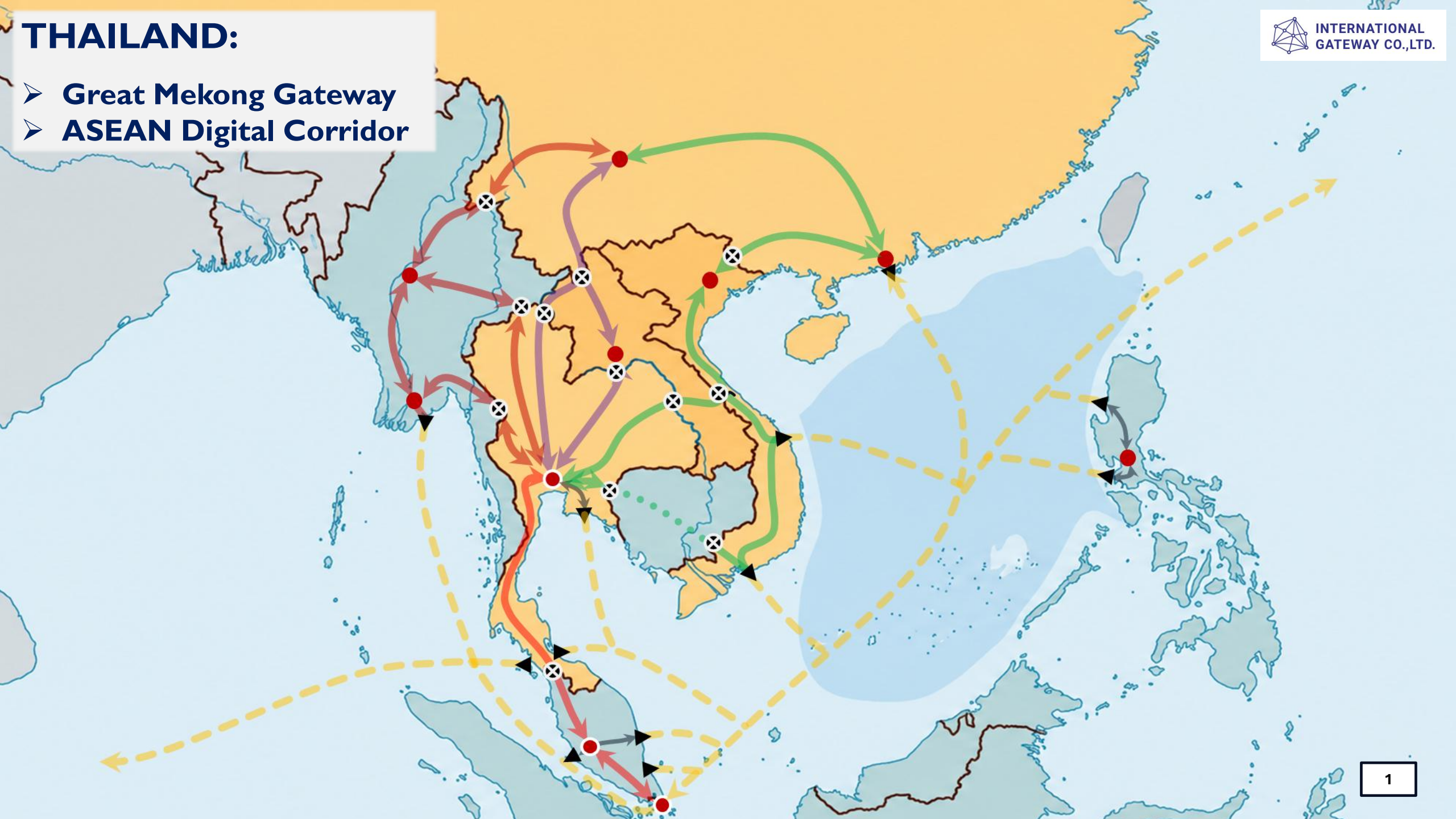
THAILAND:

- Great Mekong Gateway
- ASEAN Digital Corridor



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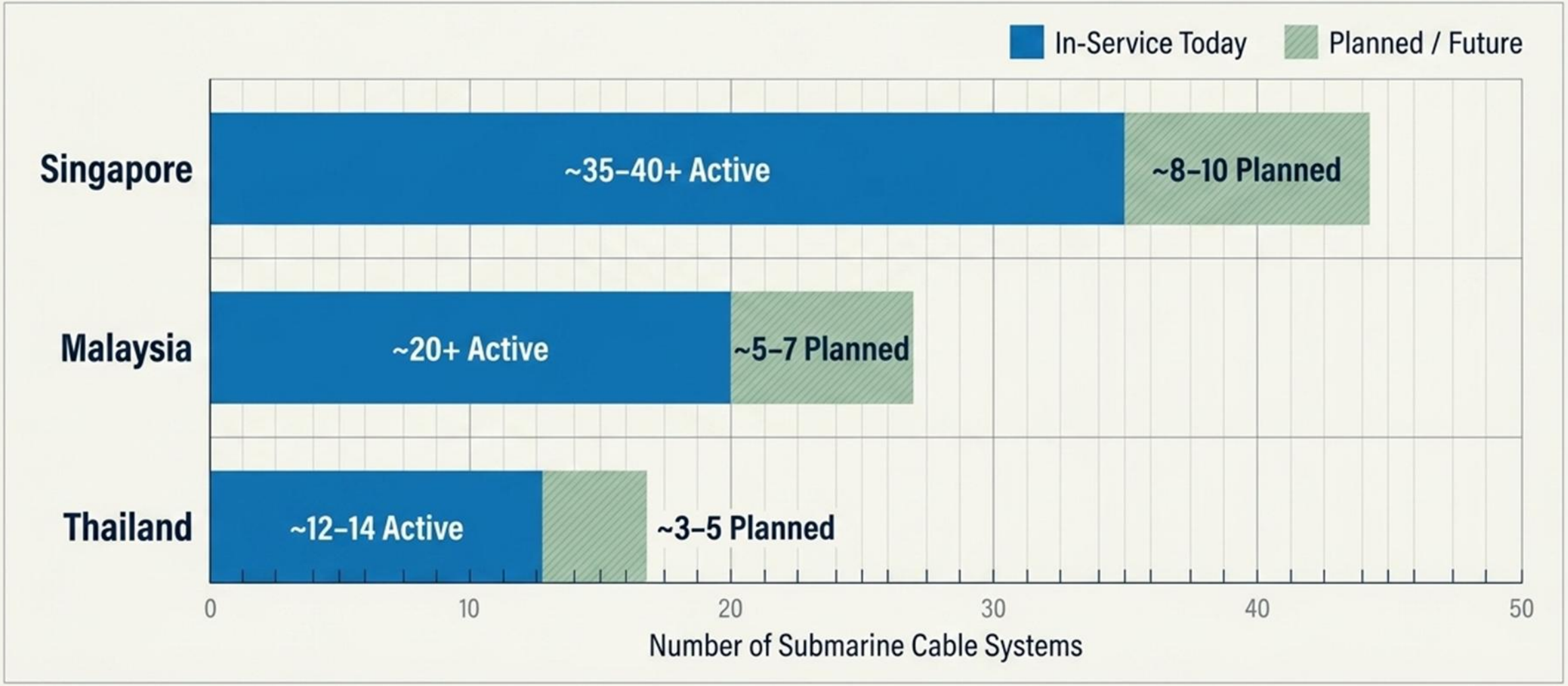
Regional infrastructure is expanding rapidly to meet the next decade of digital demand.



Cable counts vary based on domestic-only systems, branch segments, and construction status. Data references Submarine Cable Map by TeleGeography.

Singapore maintains dominance, while AI demand and route diversification accelerate Malaysia and Thailand's strategic positioning

01 / The Status Quo

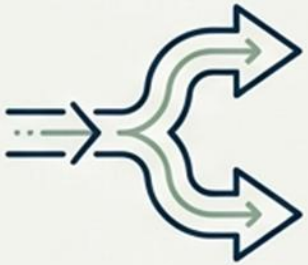
Singapore remains ASEAN's primary international hub, hosting the strongest concentration of hyperscale data centers and acting as the global gateway.

02 / The Catalyst

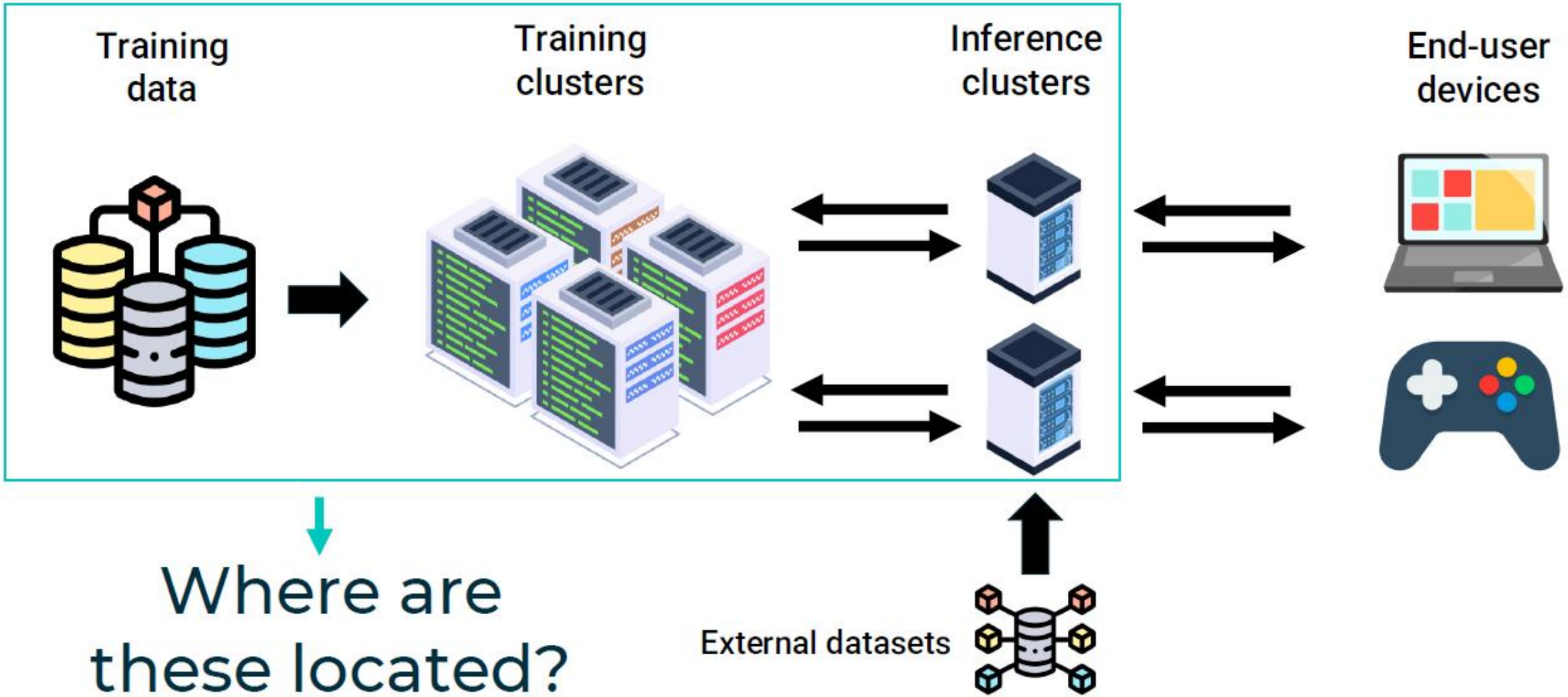
Surging AI workloads, GPU clusters, and sovereign cloud initiatives demand unprecedented route diversity, lower latency, and higher fiber-pair counts.

03 / The Emerging Reality

Malaysia and Thailand are rapidly capturing new market share, functioning as resilient alternative landing ecosystems and terrestrial gateways.

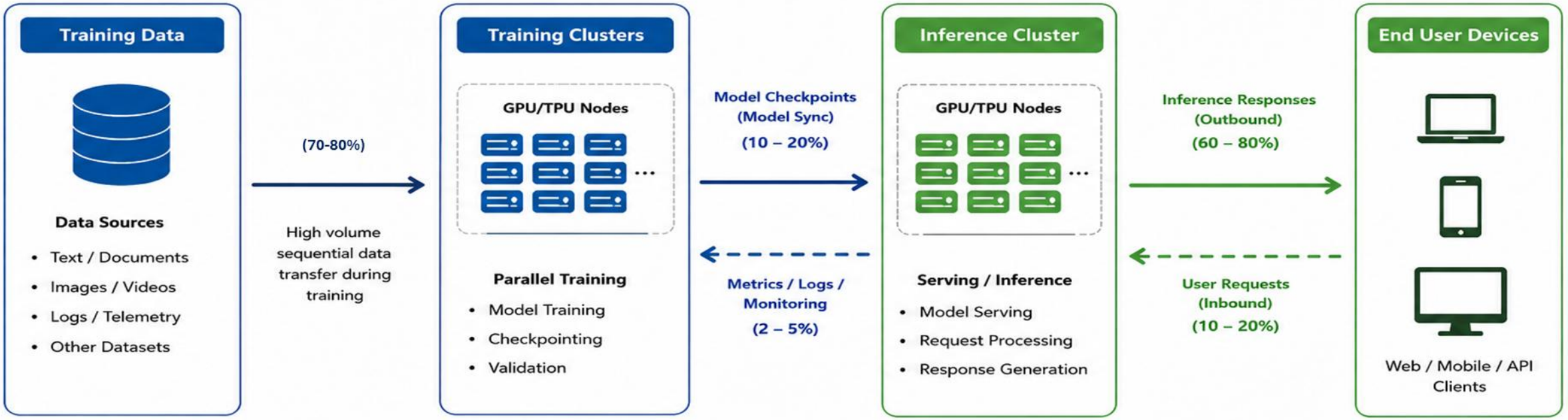


How does AI work?



Where are these located?

Estimated Traffic Flow and Volume



Traffic Legend

- Primary Data Flow (High Volume)
- Control / Sync / Monitoring (Low Volume)
- Inference Traffic (Bidirectional)

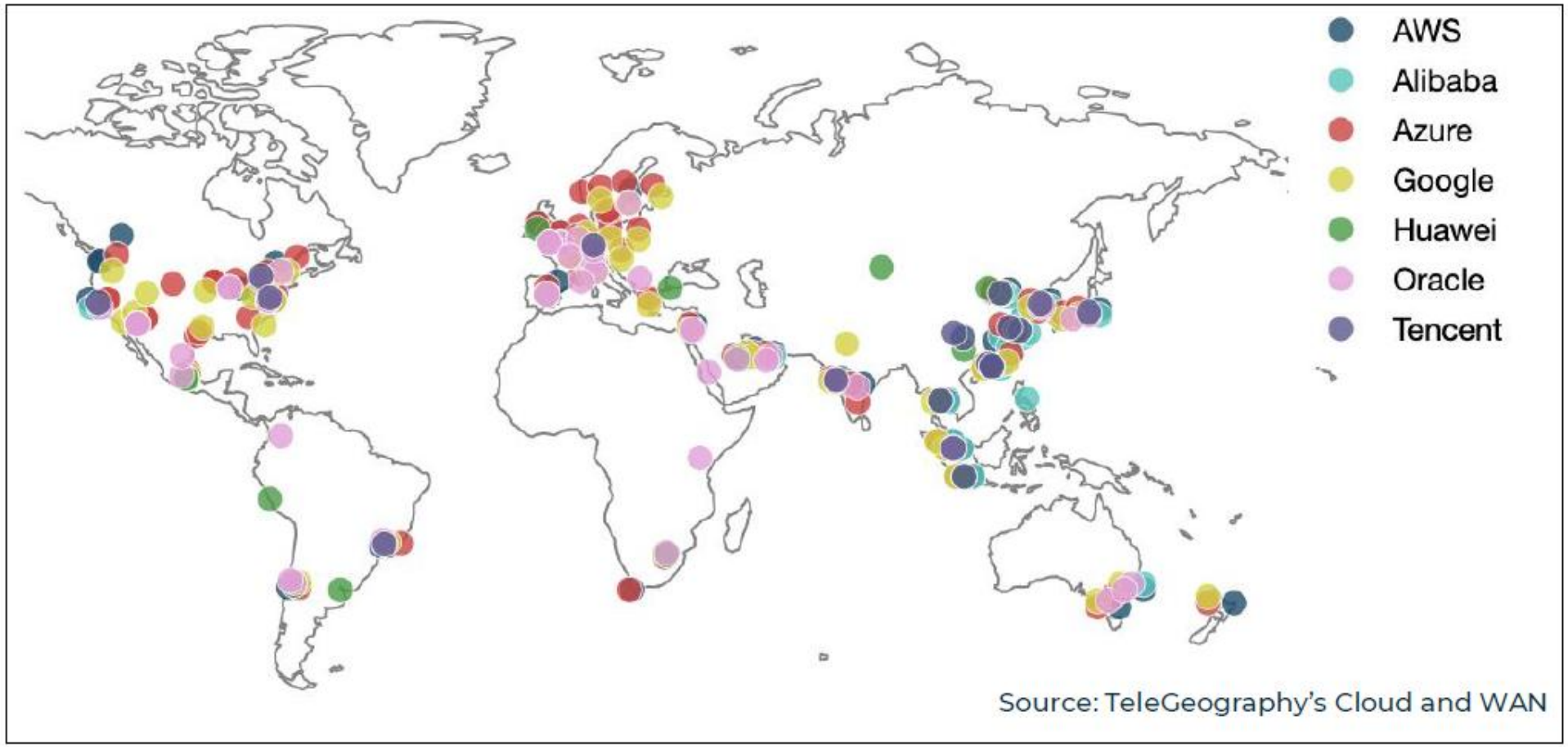
Estimated Traffic Summary

Traffic Path	Direction	Estimated Share of Total Traffic	Purpose
Training Data → Training Clusters	Outbound	70 – 80%	Bulk training data transfer
Training Clusters ↔ Inference Cluster (Model Checkpoints)	Outbound	10 – 20%	Model sync / checkpoint transfer
Inference Cluster → End User Devices (Responses)	Outbound	60 – 80%	Model inference responses
End User Devices → Inference Cluster (Requests)	Inbound	10 – 20%	User inference requests
Training Clusters ← Inference Cluster (Metrics / Logs)	Inbound	2 – 5%	Monitoring, metrics, logs

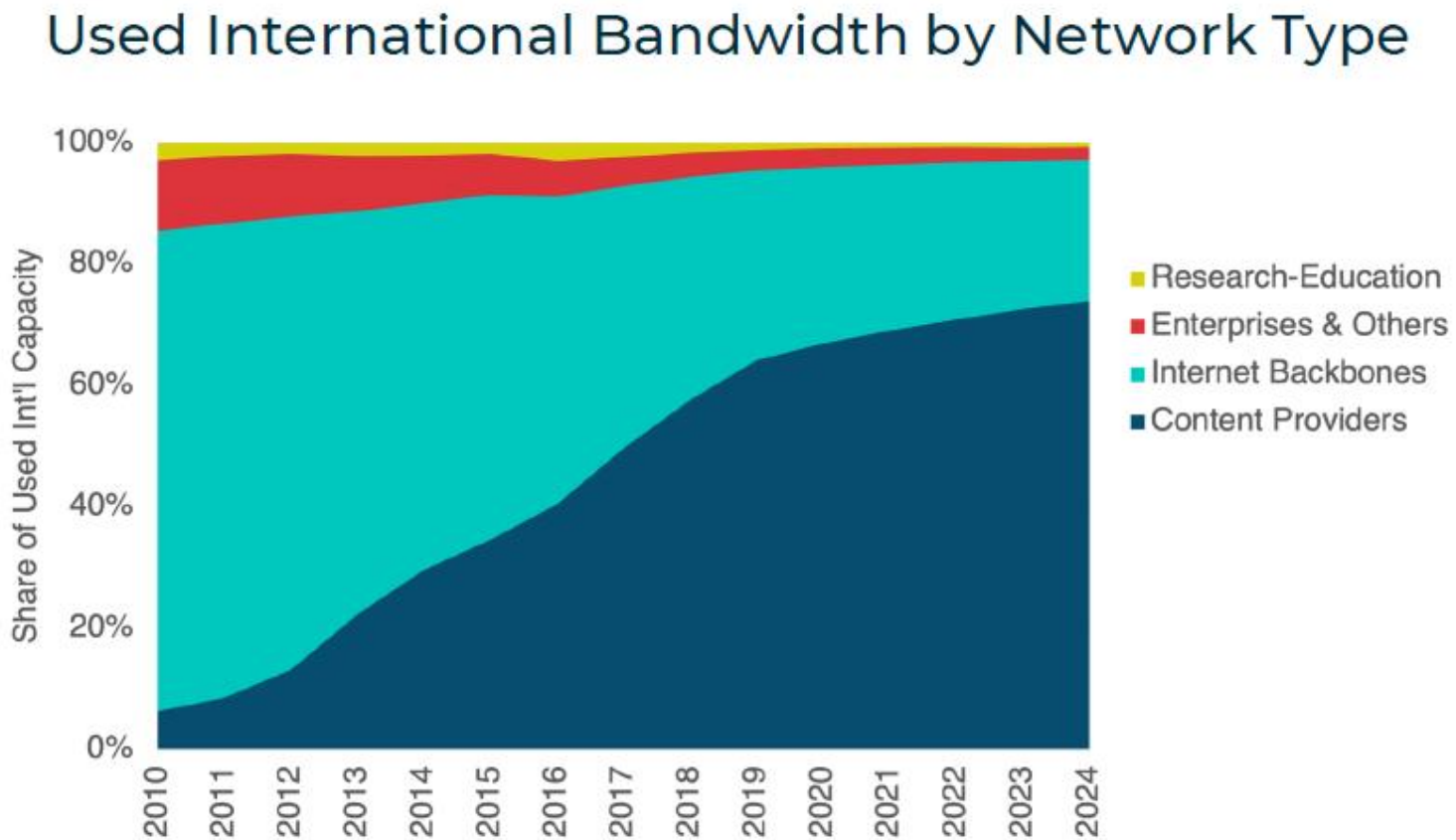
Note: Bandwidth values are approximate and vary based on model size, data volume, compression, network topology and system configuration.

Focused heavily in the cloud

Existing and Planned Cloud Data Centers



New int'l bandwidth consumers?



Source: TeleGeography's Transport Networks

- Hyperscalers' networks support their own AI models *and* third-party models too
- Some carriers starting to offer GPUaaS
- New AI-focused companies may eventually need subsea bandwidth or fiber (e.g. CoreWeave)

STRATEGIC GROWTH INDUSTRIES

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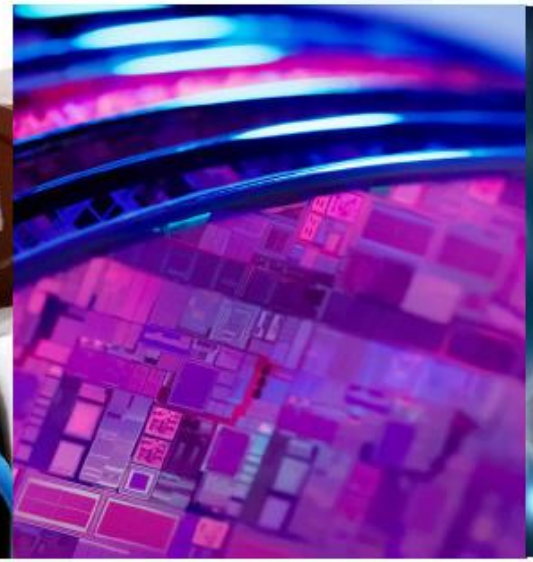
THAILAND BOARD OF INVESTMENT

BCG (BIO-CIRCULAR-GREEN)

EV & BATTERY & KEY PARTS

SEMICONDUCTOR AND ADVANCED ELECTRONICS



DIGITAL AND AI

INTERNATIONAL BUSINESS CENTER

Source: BOI

Why Great Mekong Gateway & ASEAN Digital Corridor?

- China's Digital Silk Road Initiative
- Rapid Growth of AI Infrastructures from Key OTTs
- Diversity Route of Submarine Networks
- Demand of Digital Sovereignty
- Geopolitical Resilience

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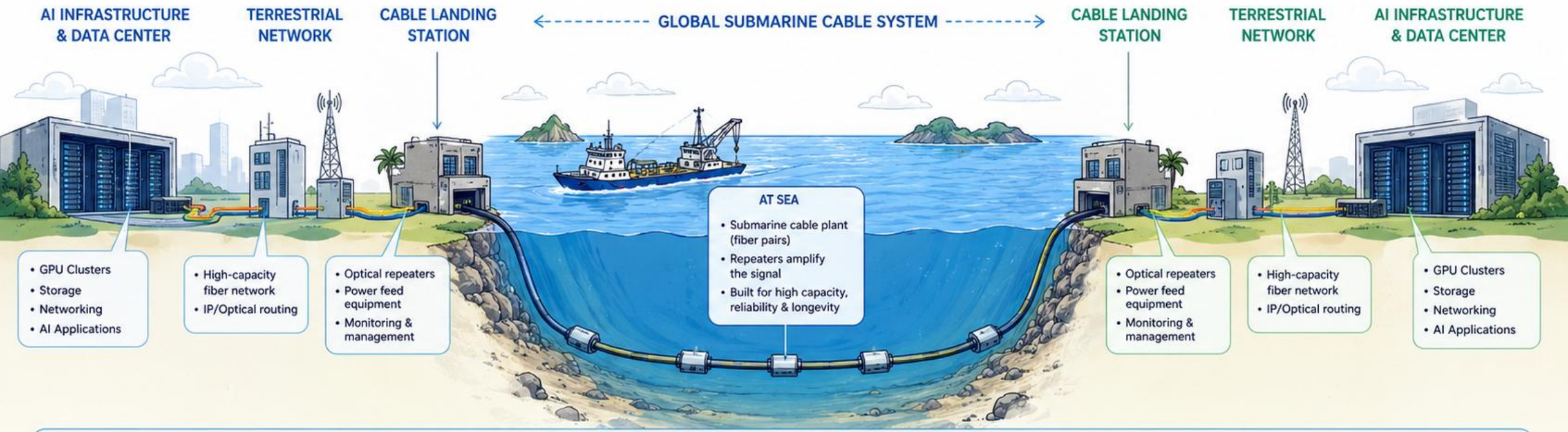
Submarine Cable System Ecosystem

Bridging the World, Powering AI

A submarine cable system connects AI infrastructure and data centers across continents, enabling the high-capacity, low-latency connectivity the world relies on.

END A

END B



KEY ECOSYSTEM PARTICIPANTS

CABLE OWNERS
Invest in and own the cable system, and define capacity and route strategy.

CABLE BUILDERS
Design, manufacture and install the submarine cable system.

NETWORK OPERATORS
Operate the cable and landing stations, monitor performance 24/7, ensure reliability.

MAINTENANCE PROVIDERS
Maintain and repair the cable system to ensure resilience over the long term.

REGULATORS & AUTHORITIES
Oversee permits, landing approvals, environment and compliance.

DATA CENTER OPERATORS
Host and operate AI infrastructure and deliver services.

CLOUD & AI PROVIDERS
Run AI platforms and services that rely on global connectivity.

This ecosystem enables secure, high-capacity, and sustainable connectivity from AI data center to AI data center—anywhere in the world.

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The Submarine Cable Ecosystem: Organizations Working Together

From Standards to Secure, Reliable Connectivity

STANDARDS — Global rules and best practices

→ **IMPLEMENTATION** — Build and deploy cable systems

→ **MAINTENANCE** — Operate, maintain and repair

→ **SECURITY & RESILIENCE** — Protect, respond and strengthen resilience

1. GLOBAL ADVOCACY & STANDARDS ORGANIZATIONS

ICPC — International Cable Protection Committee (ICPC)

Sets global industry standards and best practices. Liaises with UN bodies.

ITU — International Advisory Body for Submarine Cable Resilience

ITU & ICPC partnership that reduces permitting delays and accelerates repair response.

Standards, Best Practices & Advocacy →

Coordination & Policy Alignment ⇠⇢

3. COMMERCIAL OPERATORS & ENGINEERING FIRMS

Commercial Contractors

Own and operate specialized cable ships, ROVs and equipment to install and repair cables.

ASN (Alcatel Submarine Networks) · SubCom · NEC · HMN Technologies

Tech Infrastructure Owners

Large technology companies fund, deploy and direct their own infrastructure maintenance through global partnerships.

Meta · Google · aws

Build & Deploy Cable Systems ↓

Repair & Maintain (24/7 Readiness) ↑

2. REGIONAL CONSORTIUMS (ZONE AGREEMENTS)

ACMA
Atlantic Ocean, North Sea & Southeast Pacific. Shares repair vessels among 50+ members.

Yokohama Zone (YZ)
North Pacific region with ready repair ships, spare parts & depots.

ESCA
Promotes marine safety, environmental best practices & prevents man-made damage in European waters.

NASCA
Legal, regulatory & technical exchange for submarine cable systems in North American waters.

SEAIOCMA
Safeguarding approximately one-third of the Earth's oceans.

Operational boundaries connect four distinct coordinates via Great Circle Lines:

- West: Djibouti (East Africa)
- East: Guam (Western Pacific)
- North: Toucheng / Northern Tip of Taiwan
- South: Perth (Western Australia)

Share Information & Best Practices →

Incident Reporting & Coordination ⇠⇢

Preparedness & Rapid Response ⇠⇢

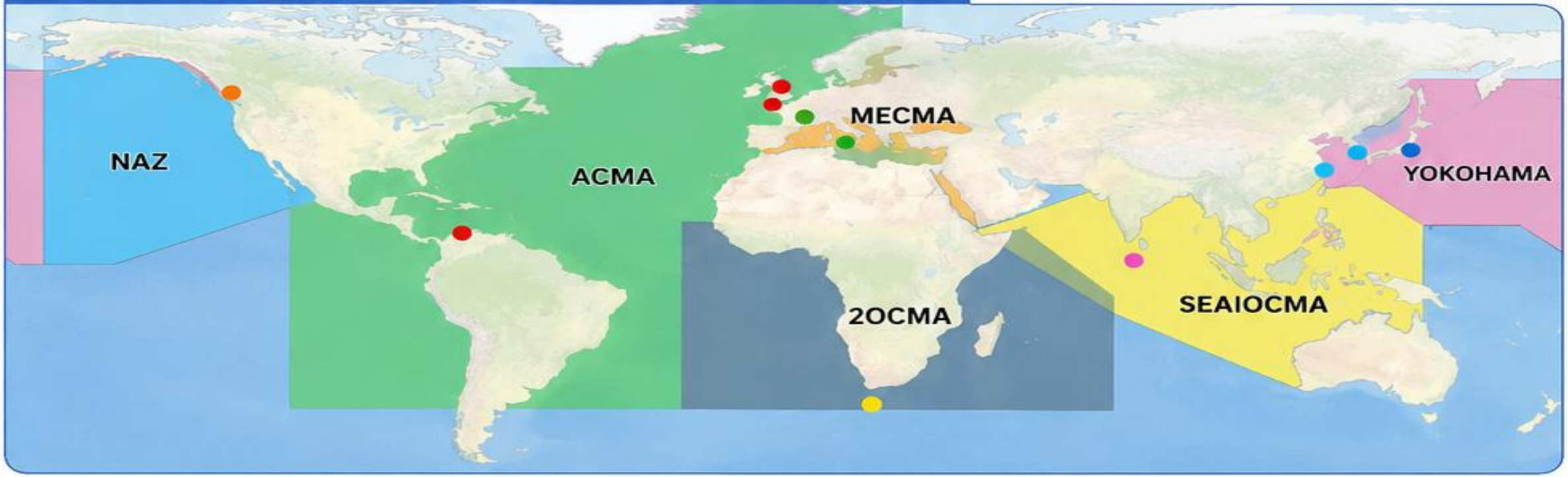
SECURITY & RESILIENCE (Shared Responsibility)

- Protect cables from natural hazards, accidents and malicious threats.
- Real-time monitoring, threat intelligence and situational awareness.
- Cross-border cooperation for faster permits and incident response.
- Stronger, more resilient networks for the digital world.

WORKING TOGETHER

Standards bodies set the rules. Consortiums and operators implement and maintain. Together, we ensure secure, resilient and reliable global connectivity.

1) GEOGRAPHIC CABLE MAINTENANCE ZONES (Source: GMSL)



ZONE LEGEND & RESPONSIBLE ORGANIZATION

GMSL (NAZ)	North America Zone
ACMA	Atlantic Cable Maintenance Agreement
MECMA	Mediterranean Cable Maintenance Agreement
2OCMA	Indian Ocean (South) Cable Maintenance Agreement
SEAIOCMA	South East Asia & Indian Ocean Cable Maintenance Agreement
KCS/KTS/SBSS (YZ)	Yokohama Zone
ACPL/IOCPL/GMSL (SEAIOCMA)	Singapore; Colombo; Manila

BASE PORTS (TYPICAL)

- Victoria, Canada
- Brest, France; Portland, UK; Curacao
- La Seyne Sur Mer, France; Catania, Italy
- Cape Town, South Africa
- Singapore; Colombo, Sri Lanka; Manila, Philippines
- Yokohama, Japan; Keoje, Korea; Wujing, China