



Arab AI Governance Lab
Laboratoire arabe de gouvernance de l'IA
المختبر العربي لحوكمة الذكاء الاصطناعي

The Arab AI Governance Report 2026

Strategy Before Statute: Institutions, Capacity
and Pathways in 22 States

Dr. Anis Ben Brik



2026

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STRATEGY BEFORE STATUTE: INSTITUTIONS, CAPACITY AND PATHWAYS IN 22
STATES

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Foreword

Artificial intelligence is moving into the core of public administration across the Arab region. Ten member states of the League of Arab States have adopted national strategies, several have created dedicated authorities, and five are building Arabic language models. At the same moment, the evidence base on how these choices are made, and with what results, has remained thin and scattered across indices built for other purposes.

This report brings that evidence into one place. It draws on the open dataset of the Arab AI Governance Lab, which codes strategies, institutions, laws and capacities for all 22 member states from primary documents and pairs them with international panels on readiness, digital government, human capital and cybersecurity.

The report is written for public officials, regulators, regional organisations and their partners. It describes the state of play without ranking national policy choices, identifies routes that states at different stages have taken, and proposes a way forward differentiated by stage.

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Executive summary

Governments across the Arab region are placing artificial intelligence at the centre of national development plans. This report describes how the 22 member states of the League of Arab States govern AI, using the 2025 release of the open dataset of the Lab and the international indices recorded in it.

Key messages

Strategy is ahead of statute. Ten states have adopted a national AI strategy and nine have a dedicated body. A standalone AI law is still to come in all 22; the draft law in Bahrain is the most advanced initiative.

The binding inequality is institutional, not technological. Dispersion across the region is far greater on regulation (coefficient of variation 0.89) than on digital government (0.30), AI readiness (0.40) or cybersecurity (0.52). Instruments follow institutions: the number of instruments correlates at 0.97 with the number of dedicated bodies.

The region is diverging. The dispersion of readiness scores rose from 14.07 to 17.40 between 2020 and 2025, and states that started higher gained more. Every state with data except Lebanon improved on digital government, and the gap between the Gulf and other states still widened.

Two different gaps call for different remedies. Kuwait, Jordan, Oman, Algeria and Morocco hold latent capacity that their regulatory stage does not reflect; Iraq and Tunisia have regulation that runs ahead of administrative capacity.

People are the binding constraint in fragile contexts. The Human Capital Index rose by 0.099 on average in the Gulf and fell by 0.092 in Iraq, Lebanon, Libya, the Syrian Arab Republic and Yemen.

Research and language capacity are concentrated. Three states produce 65 per cent of indexed AI research, and the five sovereign Arabic language-model programmes include all three Advanced states.

Way forward

Nine priority gaps are matched with recommendations and indicators in chapter 11. Policy directions are differentiated by stage under four headings: foundations, institutions, instruments and engagement. Advanced states can move from guidance to binding obligations for high-risk public uses and lead regional standard-setting. Intermediate and Emerging states can consolidate the institutional route by funding data protection authorities and implementation budgets. States at the Initial stage can advance quickly by designating a lead body. At the Nascent stage, basic digital government, data protection and cybersecurity come first. Regional bodies can lower costs for all through shared tools.

The report at a glance

10 states with a national AI strategy	9 states with a dedicated AI governance body
0.89 coefficient of variation on regulation, the most unequal pillar	17.40 dispersion of readiness scores in 2025, up from 14.07 in 2020
+40.7 largest latent capacity: Kuwait, capacity ahead of regulation	-18.1 regulation ahead of capacity in Iraq
65% of indexed AI research produced in three states	-0.092 mean change in human capital, five fragile or conflict-affected states

Acronyms, country codes and reader guide

AI	Artificial intelligence
DCO	Digital Cooperation Organization
EGDI	E-Government Development Index (United Nations)
fsQCA	Fuzzy-set Qualitative Comparative Analysis
GCC	Gulf Cooperation Council
GCI	Global Cybersecurity Index (ITU)
HCI	Human Capital Index (component of the EGDI)
ITU	International Telecommunication Union
NCSI	National Cyber Security Index (e-Governance Academy)
OECD	Organisation for Economic Co-operation and Development
SDAIA	Saudi Data and AI Authority
UN DESA	United Nations Department of Economic and Social Affairs

Country codes and flags

 ARE	United Arab Emirates	 SAU	Saudi Arabia
 QAT	Qatar	 BHR	Bahrain
 KWT	Kuwait	 OMN	Oman
 EGY	Egypt	 MAR	Morocco
 TUN	Tunisia	 DZA	Algeria
 LBY	Libya	 MRT	Mauritania
 JOR	Jordan	 LBN	Lebanon
 PSE	State of Palestine	 SYR	Syrian Arab Republic
 IRQ	Iraq	 YEM	Yemen
 SDN	Sudan	 DJI	Djibouti
 SOM	Somalia	 COM	Comoros

Reader guide

States are identified by flag and ISO3 code in figures and tables. Geographic areas are the Gulf; North Africa; the Levant and Iraq; and the Red Sea, Horn and Indian Ocean. “n/a” means not reported in the source; a missing value is never treated as a low value. Unless stated otherwise, data refer to the 2025 release of the dataset.



I

The state of play: AI governance across the Arab region

This chapter gives the regional overview. It introduces the five stages of regulatory maturity and the Arab AI Governance Index, describes how the 22 member states of the League of Arab States are distributed across them, and compares four geographic areas. It sets the frame for the thematic chapters that follow.

Key messages

- Ten states have adopted a national AI strategy and nine have a dedicated governance body. A standalone AI law is still to come in all 22.
- Three states are at the Advanced stage, three Intermediate, three Emerging, four Initial and nine Nascent.
- Index scores run from 91.8 to 12.6. The Gulf mean is 78.4, North Africa 49.2, and the Levant and Iraq 32.5.
- Stages and scores describe published frameworks and third-party indices. They are a map for peer learning, not a judgement on national policy choices.

Five stages of regulatory maturity

The Lab codes each state on cumulative indicators drawn from primary documents: a national AI strategy, a dedicated governance body, an enacted data protection law, a risk classification scheme, a regulatory sandbox and the number of AI-relevant regulatory instruments. The indicators are combined into five stages, from Nascent to Advanced.

The Advanced stage (the United Arab Emirates, Saudi Arabia and Qatar) combines several binding instruments with enforced data protection law, a dedicated body at federal or prime-ministerial level, risk classification and sandboxes. The Intermediate stage (Bahrain, Egypt and Tunisia) has data protection law, a strategy and a dedicated body in place. Emerging states (Oman, Morocco and Iraq) have adopted or are developing a strategy with partial supporting law. Initial states (Kuwait, Algeria, Jordan and Mauritania) have limited formal arrangements. Nine states are at the Nascent stage, most of them in fragile or conflict-affected contexts.

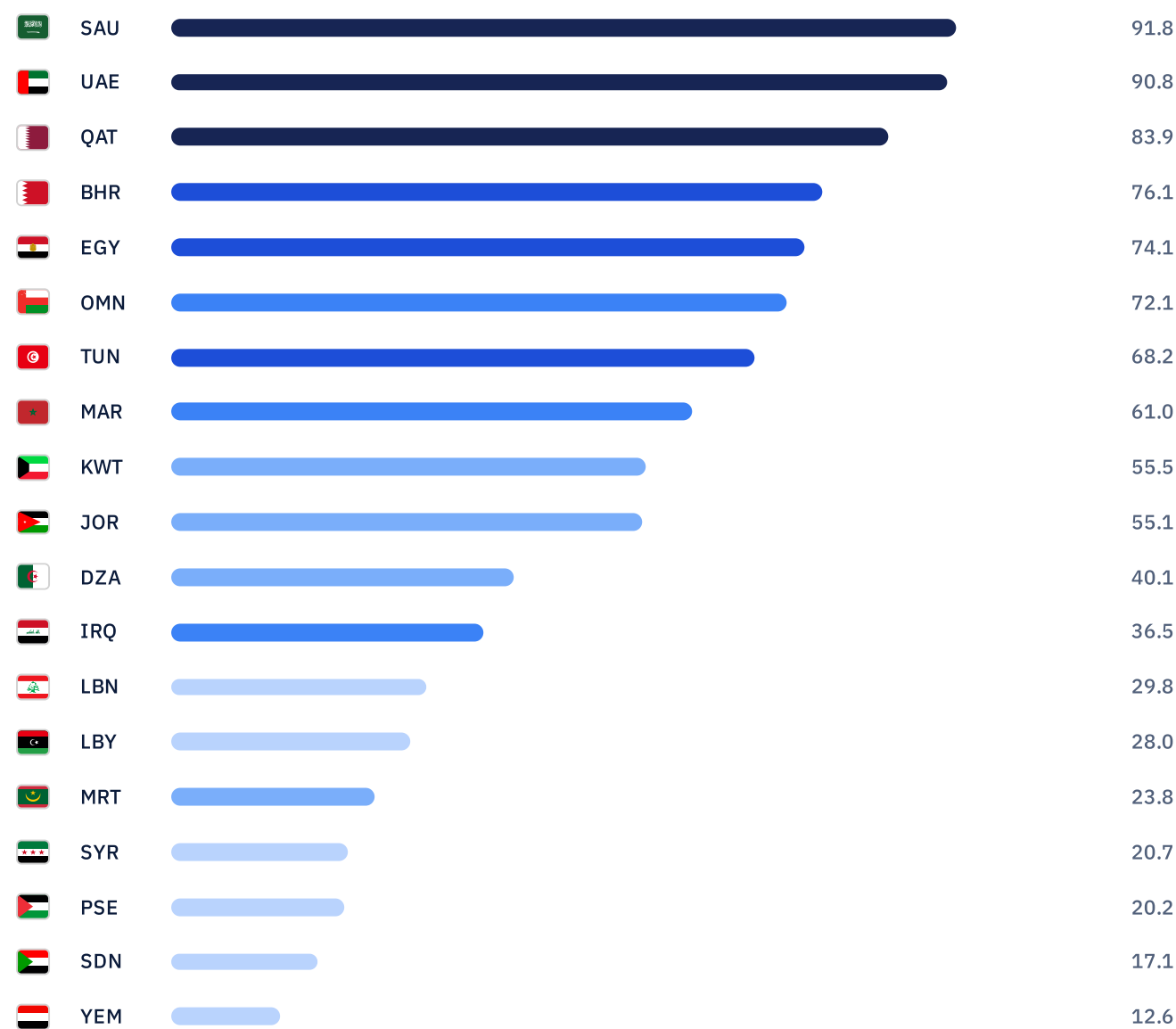


Advanced (3)
 Intermediate (3)
 Emerging (3)
 Initial (4)

 Nascent (9)

The Arab AI Governance Index

Figure 1.1. Arab AI Governance Index 2025



Note: Four pillars, equal weights; three of four pillars required. Comoros, Djibouti and Somalia are not scored. Mauritania, Sudan, the State of Palestine and Yemen are scored on three pillars.

Source: Author computation from Arab AI Governance Lab Dataset (Ben Briq et al., 2025), Oxford Insights (2025), UN DESA (2024) and ITU (2024).

Box 1.1. How the index is built

The index averages four pillars on a 0 to 100 scale with equal weights: regulatory maturity (the Lab stage, rescaled from 0 to 100), AI readiness (Oxford Insights, 2025), digital government (UN E-Government Development Index 2024, multiplied by 100) and cybersecurity (ITU Global Cybersecurity Index 2024).

Equal weighting is a convention, not a finding. Composite rankings can shift under alternative weights and normalisation choices (Ben Brik, 2026a), so pillar values are reported beside every score.

Three Gulf states hold the first three positions. Bahrain, Egypt and Tunisia follow as a group in which data protection law, a national strategy and a dedicated body are all in place. Oman and Morocco post cybersecurity scores above 80, and Kuwait and Jordan reach the mid-50s on the strength of digital government and cybersecurity. States at the Nascent stage score below 30 where they can be scored.

Table 1.1.

Index scores and pillars

State	Stage	Index	Regulation	Readiness	Digital government	Cybersecurity
 SAU	Advanced	91.8	100.0	71.6	96.0	99.5
 UAE	Advanced	90.8	100.0	69.9	95.3	98.1
 QAT	Advanced	83.9	100.0	58.6	82.4	94.5
 BHR	Intermediate	76.1	75.0	59.6	92.0	77.9
 EGY	Intermediate	74.1	75.0	59.1	67.0	95.5
 OMN	Emerging	72.1	50.0	56.7	85.8	96.0
 TUN	Intermediate	68.2	75.0	42.2	69.3	86.2
 MAR	Emerging	61.0	50.0	43.1	68.4	82.4
 KWT	Initial	55.5	25.0	43.8	78.1	75.1
 JOR	Initial	55.1	25.0	56.1	68.5	71.0
 DZA	Initial	40.1	25.0	42.0	59.6	34.0
 IRQ	Emerging	36.5	50.0	29.4	45.7	20.7
 LBN	Nascent	29.8	0.0	34.3	54.5	30.4
 LBY	Nascent	28.0	0.0	28.4	54.7	28.8
 MRT	Initial	23.8	25.0	27.6	n/a	18.9

State	Stage	Index	Regulation	Readiness	Digital government	Cybersecurity
 SYR	Nascent	20.7	0.0	21.7	38.9	22.1
 PSE	Nascent	20.2	0.0	35.5	n/a	25.2
 SDN	Nascent	17.1	0.0	16.2	n/a	35.0
 YEM	Nascent	12.6	0.0	14.5	23.2	n/a

Note. n/a = pillar not available.

Four geographic areas

Table 1.2.
Summary by geographic area

Area	States	Members	Mean index	Mean AI readiness 2025	Mean ITU GCI	Stage distribution
Gulf	6		78.4	60.0	90.2	Advanced 3, Intermediate 1, Emerging 1, Initial 1
North Africa	6		49.2	40.4	57.6	Intermediate 2, Emerging 1, Initial 2, Nascent 1
Levant and Iraq	5		32.5	35.4	33.9	Emerging 1, Initial 1, Nascent 3
Red Sea, Horn and Indian Ocean	5		14.9	15.3	35.0	Nascent 5

Note. Means are computed over states with data; the mean index for the Red Sea, Horn and Indian Ocean area covers Sudan and Yemen only.

Where the region is unequal

Dispersion differs sharply by pillar (Table 1.3). The coefficient of variation is 0.89 for regulation, against 0.52 for cybersecurity, 0.40 for AI readiness and 0.30 for digital government. The region is far more unequal in the institutionalisation of AI governance than in the administrative and technical capacities on which it rests. The binding inequality is institutional, not technological.

The pattern has a practical corollary. Capacities that took a decade to build, such as e-government platforms and cybersecurity agencies, are already present in many states that have no AI framework. For those states the marginal cost of institutionalisation is low, a point developed in chapter 10.

The binding inequality is institutional, not technological.

Table 1.3.
Dispersion of scores by pillar

Pillar	States	Mean	Standard deviation	Coefficient of variation	Minimum	Maximum
Regulation	19	40.8	36.5	0.89	0.0	100.0
AI readiness	19	42.6	16.9	0.40	14.5	71.6
Digital government	16	67.5	20.2	0.30	23.2	96.0
Cybersecurity	18	60.6	31.3	0.52	18.9	99.5

Note. Population standard deviation over states with data. The coefficient of variation is the standard deviation divided by the mean.

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2

Regulation and institutions

This chapter examines the formal architecture of AI governance: strategies, dedicated bodies, regulatory instruments, data protection law and international alignment. It compares the institutional models in use and identifies the legislative initiatives under way.

Key messages

- Ten states have adopted a national AI strategy and nine have a dedicated governance body. A standalone AI law is still to come in all 22.
- The draft AI law in Bahrain (38 articles, approved by the Shura Council in April 2024) is the most advanced legislative initiative in the region.
- Saudi Arabia, the UAE and Qatar account for 27 of the 53 AI-relevant regulatory instruments coded.
- Eight states have enacted a data protection statute, the instrument on which most current AI oversight rests; the prevailing instrument mix combines soft law, sector rules and cybercrime legislation.

10

national AI strategies

9

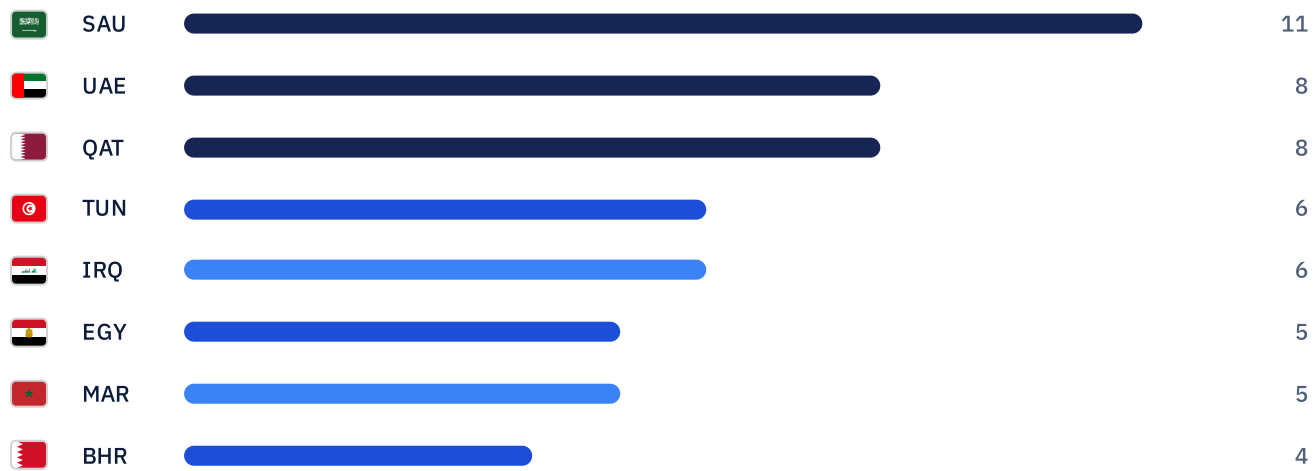
states with a dedicated AI body

53

AI-relevant instruments coded

Governance in the region rests on combinations of soft law, data protection statutes, sector rules and cybercrime legislation. Saudi Arabia records the largest number of AI-relevant instruments (11) and governance bodies (6); the United Arab Emirates and Qatar follow with eight instruments each.

Figure 2.1. AI-relevant regulatory instruments by state



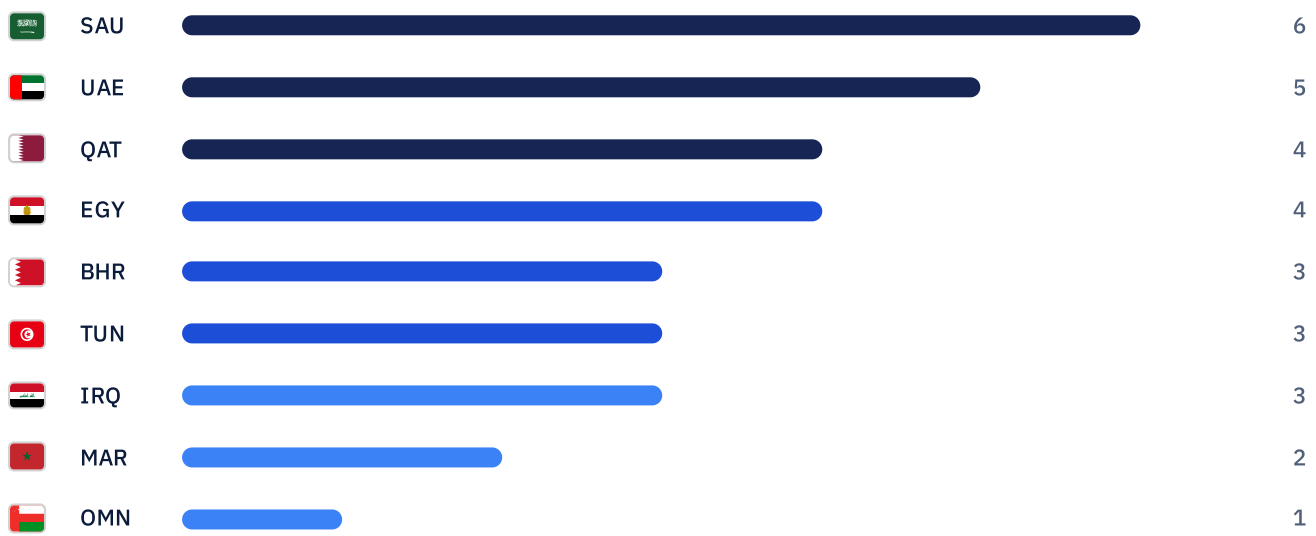
Note: States with no instrument coded are not shown.

Source: Arab AI Governance Lab Dataset (Ben Brik et al., 2025), table F1; Regulations.AI country pages.

Box 2.1. The draft AI law in Bahrain

In April 2024 the Shura Council of Bahrain approved a draft AI Regulation Law of 38 articles in seven chapters. The draft is licensing-based, includes a human oversight requirement and sets out penalties. If enacted, it would be the first dedicated AI statute in the region and a reference text for neighbouring legislatures.

Figure 2.2. Dedicated AI governance bodies by state



Source: Arab AI Governance Lab Dataset (Ben Brik et al., 2025), table F1.

Box 2.2. Three Gulf models of enforcement

Procurement and experimentation (United Arab Emirates). Soft law and experimental legislation, with public procurement as the lever for compliance.

Direct enforcement (Saudi Arabia). A binding data protection law, a four-level risk classification and direct supervisory powers held by SDAIA.

Sector rules (Qatar). Horizontal ethics guidance with binding AI requirements in financial services through the central bank.

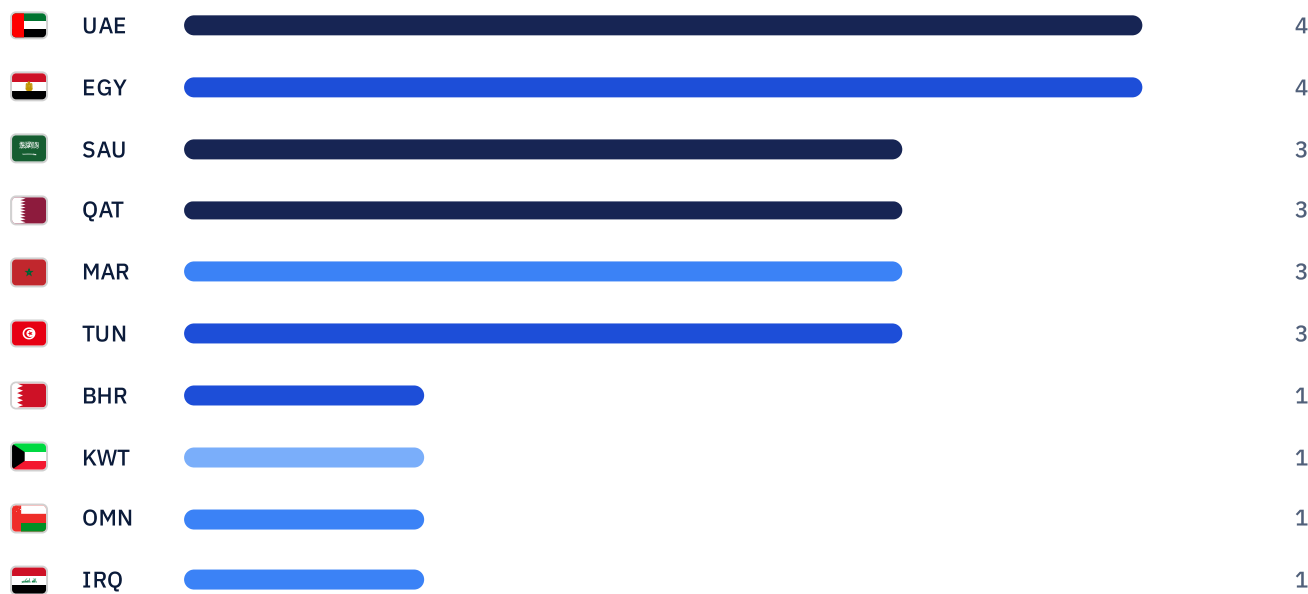
Outside the Gulf, Egypt has moved to a second-generation strategy with a phased path from guidance to binding rules, and Tunisia and Morocco anchor their frameworks in long-standing data protection statutes. International alignment is widest in the United Arab Emirates and Egypt (four frameworks referenced each).

Sequence and alignment

The dates of data protection statutes show two generations of legal foundations. Tunisia (2004) and Morocco (2009) legislated more than a decade before any national AI strategy existed in the region; the Gulf statutes cluster between 2016 and 2021, and Egypt legislated in 2020. In every case the statute preceded or accompanied the strategy, which is why data protection authorities, where they exist, are the oldest AI-relevant regulators in the region and the natural anchor for algorithmic oversight.

International alignment rises with regulatory stage ($r = 0.87$). The United Arab Emirates and Egypt reference four frameworks each; Saudi Arabia, Qatar, Morocco and Tunisia three; Bahrain, Kuwait, Oman and Iraq one; nine states none. Alignment is a marker of institutionalisation, not a substitute for it: no state combines high alignment with a low stage.

Figure 2.3. International AI frameworks referenced, by state



Note: Nine states reference no framework.
Source: Arab AI Governance Lab Dataset (Ben Brik et al., 2025), table F1.

Gaps and challenges

Three regularities stand out in the coding. (i) Instruments follow institutions: across the 19 states displayed, the number of AI-relevant instruments correlates at $r = 0.97$ with the number of dedicated bodies, and no state has accumulated instruments without first creating a body to issue them. (ii) Data protection comes first: each of the eight states with an enacted data protection statute also has a national AI strategy, and no state at the Initial or Nascent stage has such a statute coded. (iii) Two sequencing anomalies mark the frontier of the problem. Iraq has three bodies and six instruments without a data protection statute, so its instruments lack the legal basis on which oversight rests elsewhere. Mauritania has a strategy without any body to implement it.

International visibility is concentrated. Saudi Arabia accounts for 64 of the 91 initiatives registered with the OECD.AI observatory (70 per cent); the United Arab Emirates, Egypt, Tunisia, Morocco and Algeria account for the rest. Registration reflects reporting effort as well as activity, which is one reason why counts of initiatives should not be read as measures of governance quality.

For the Advanced group the challenge is the move from soft law to enforceable obligations: binding force currently comes from data protection law and, in Qatar, from financial regulation, not from AI-specific duties on public bodies. For the Intermediate group the challenge is enactment and resourcing; the Bahrain draft was awaiting parliamentary passage at the time of coding.

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Ben Brik, A., Gilbert, N., & Pycińska, M. (2025). *Arab AI Governance Lab Dataset* [Data set]. Harvard Dataverse. <https://doi.org/10.7910/DVN/MOVIFA>

OECD. (n.d.). *OECD.AI Policy Observatory*. <https://oecd.ai>

3

Readiness and digital government

This chapter tracks how prepared public administrations are to design, implement and oversee AI policy. It uses two external panels, the Oxford Insights Government AI Readiness Index (2020 to 2025) and the UN E-Government Development Index (2018 to 2024), and discusses how composite indices should be read.

Key messages

- Saudi Arabia moved from position 52 to position 6 on the UN e-government index between 2018 and 2024, the largest advance in the region.
- Nine of 17 states with comparable data improved their AI readiness score between 2020 and 2025; Saudi Arabia (+15.34), Jordan (+14.31) and Egypt (+9.91) gained most.
- Egypt shows that steady improvement is possible outside the high-income group.
- The 2025 Oxford Insights edition revised its method, so changes between 2023 and 2025 combine real movement with method effects.

52 → 6

Saudi Arabia, UN e-government position

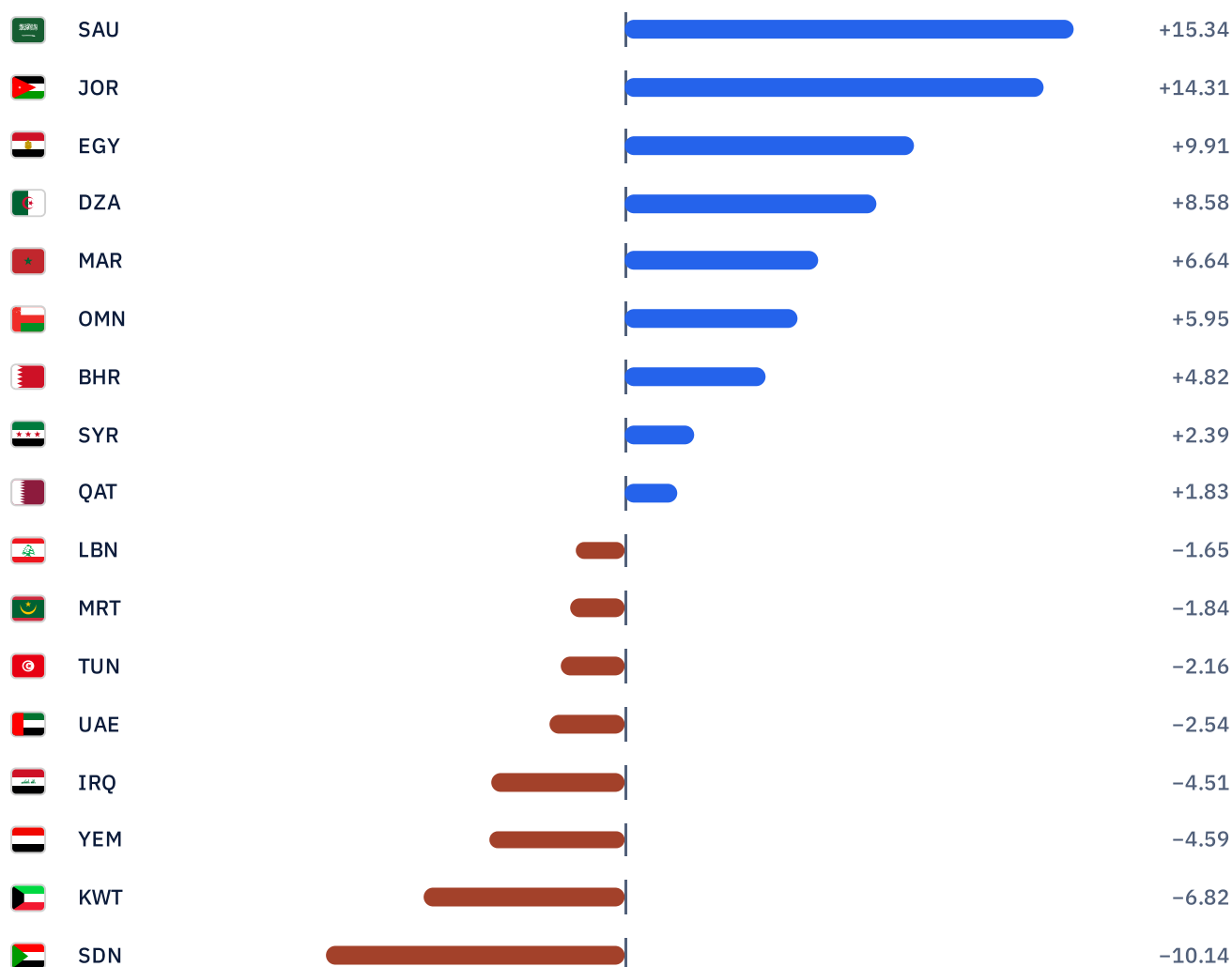
+9.91

Egypt, readiness points since 2020

9 of 17

states improved readiness

Figure 3.1. Change in AI readiness score, 2020 to 2025

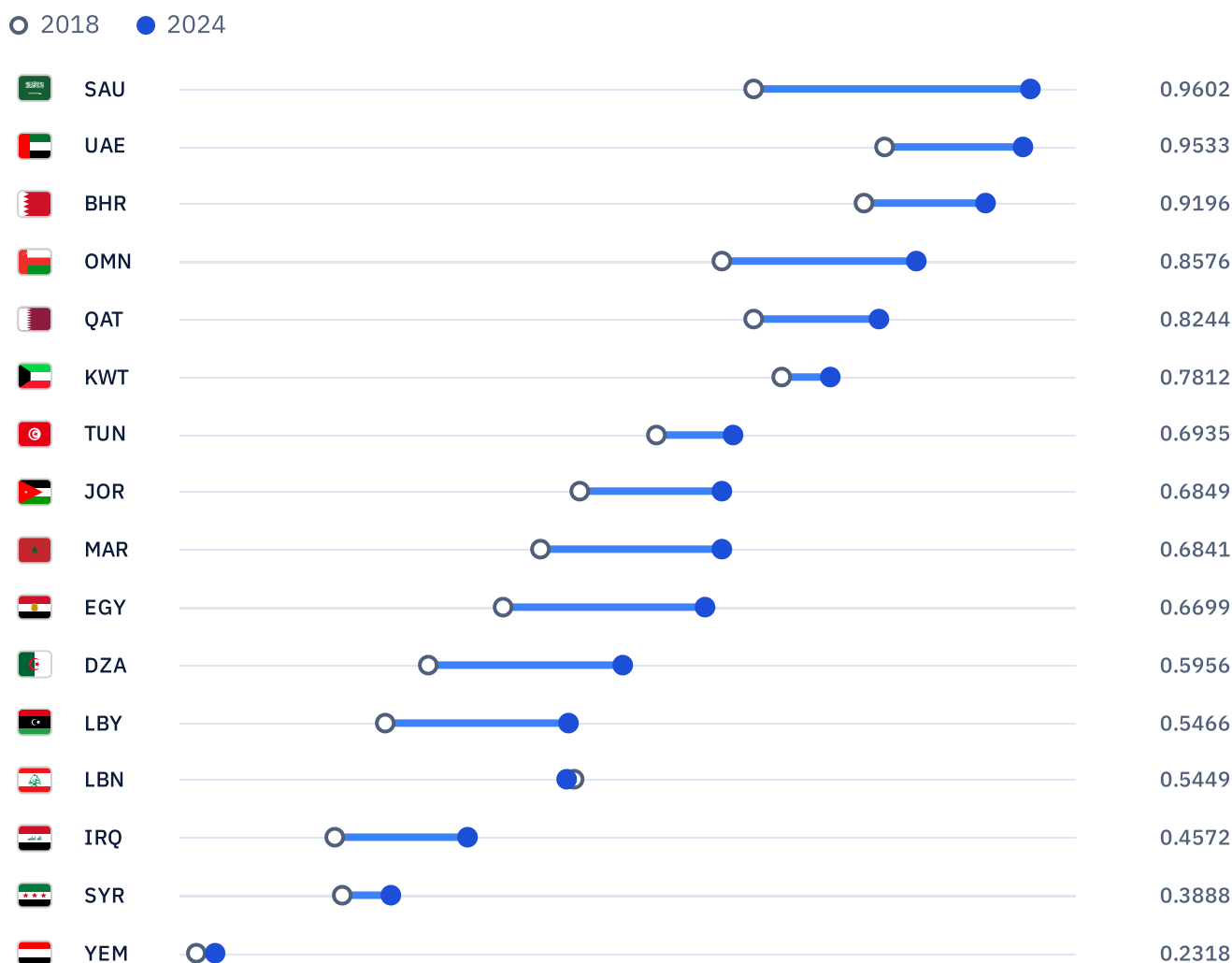


Note: Libya and the State of Palestine have no comparable 2020 value. The 2025 edition revised the pillar method.

Source: Oxford Insights (2020–2025); author computation.

Nine of 17 states improved their score over the period. Saudi Arabia gained 15.34 points and moved ahead of the United Arab Emirates in 2025; Jordan gained 14.31, Egypt 9.91 and Algeria 8.58. Eight states recorded lower scores in 2025 than in 2020, among them states in fragile or conflict-affected contexts.

Figure 3.2. E-Government Development Index, 2018 and 2024



Source: UN DESA (2018, 2024).

On the UN index the largest advances were recorded by Saudi Arabia (position 52 to 6), Oman (63 to 41), the United Arab Emirates (21 to 11) and Bahrain (26 to 18). Egypt, Morocco, Algeria and Jordan also improved their positions.

The region is diverging: states that started higher gained more.

Convergence or divergence?

The readiness panel shows divergence, not catch-up. Among the 17 states observed in both years, the standard deviation of Oxford Insights scores rose from 14.07 in 2020 to 17.40 in 2025, and the correlation between the

2020 level and the subsequent change is positive ($r = 0.27$): states that started higher tended to gain more. The Gulf mean rose from 56.92 to 60.02; the mean of the other states moved from 33.56 to 35.10.

Digital government tells a similar story at a higher level. Every one of the 16 states with data except Lebanon improved its EGDI score between 2018 and 2024, and the regional mean rose from 0.559 to 0.675. The Gulf mean rose by 0.135 and the mean of the other states by 0.105, so the absolute gap widened from 0.303 to 0.333, and the dispersion of scores increased from 0.178 to 0.202.

Table 3.1.

Dispersion and group means, first and last year

Panel	First year	Last year	SD, first year	SD, last year	Gulf mean, first	Gulf mean, last	Other states, first	Other states, last
Oxford Insights AI readiness (n = 17)	2020	2025	14.07	17.40	56.92	60.02	33.56	35.10
UN E-Government Development Index (n = 16)	2018	2024	0.178	0.202	0.748	0.883	0.445	0.550

Note. SD = population standard deviation over states observed in both years.

Two implications follow. Readiness gains track sustained institutional investment, not income alone: Jordan and Egypt, both outside the high-income group, recorded the second and third largest gains, while Kuwait and the United Arab Emirates recorded declines. And because composite scores respond to revisions of method, movements of a few points from one year to the next should not drive policy; the direction over five years is the more reliable signal.

One capacity, two measurements

Figure 3.3. AI readiness (2025) and e-government development (2024)



Note: Sixteen states have both scores.

Source: Oxford Insights (2025); UN DESA (2024).

The two panels are highly correlated ($r = 0.93$, $n = 16$). They should be read as two measurements of one underlying administrative capacity, not as independent confirmation of each other. Short-run volatility is considerable: between 2023 and 2025 the mean absolute change in readiness scores was 3.87 points and eight of 19 states improved, against nine of 17 over the full period from 2020.

Box 3.1. Reading composite indices with care

Composite indices compress many indicators into one number. Rankings can change when weights, normalisation or missing-data rules change (Ben Briq, 2026a), and scores can lag institutional change, as the Lebanese series shows. This report therefore pairs every composite score with institutional evidence from primary documents.

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4

Research output

This chapter examines scientific output on AI and the resources behind it, and asks whether research capacity is connected to regulatory capacity.

Key messages

- Saudi Arabia (1,189), Iraq (679) and Egypt (669) led indexed AI publications in 2023 among states with data.
- Research output and regulatory maturity do not develop in step: Iraq, Jordan and Algeria hold research communities larger than their regulatory stage would suggest.
- These research communities constitute absorptive capacity for regulators; formal advisory links between universities and AI authorities remain rare.
- UAE publication counts are missing from the 2025 release, so comparisons cover states with data only.

1,189

AI publications, Saudi Arabia 2023

679

AI publications, Iraq 2023

9

states reporting R&D spending

Figure 4.1. Regulatory maturity and AI publications, 2023



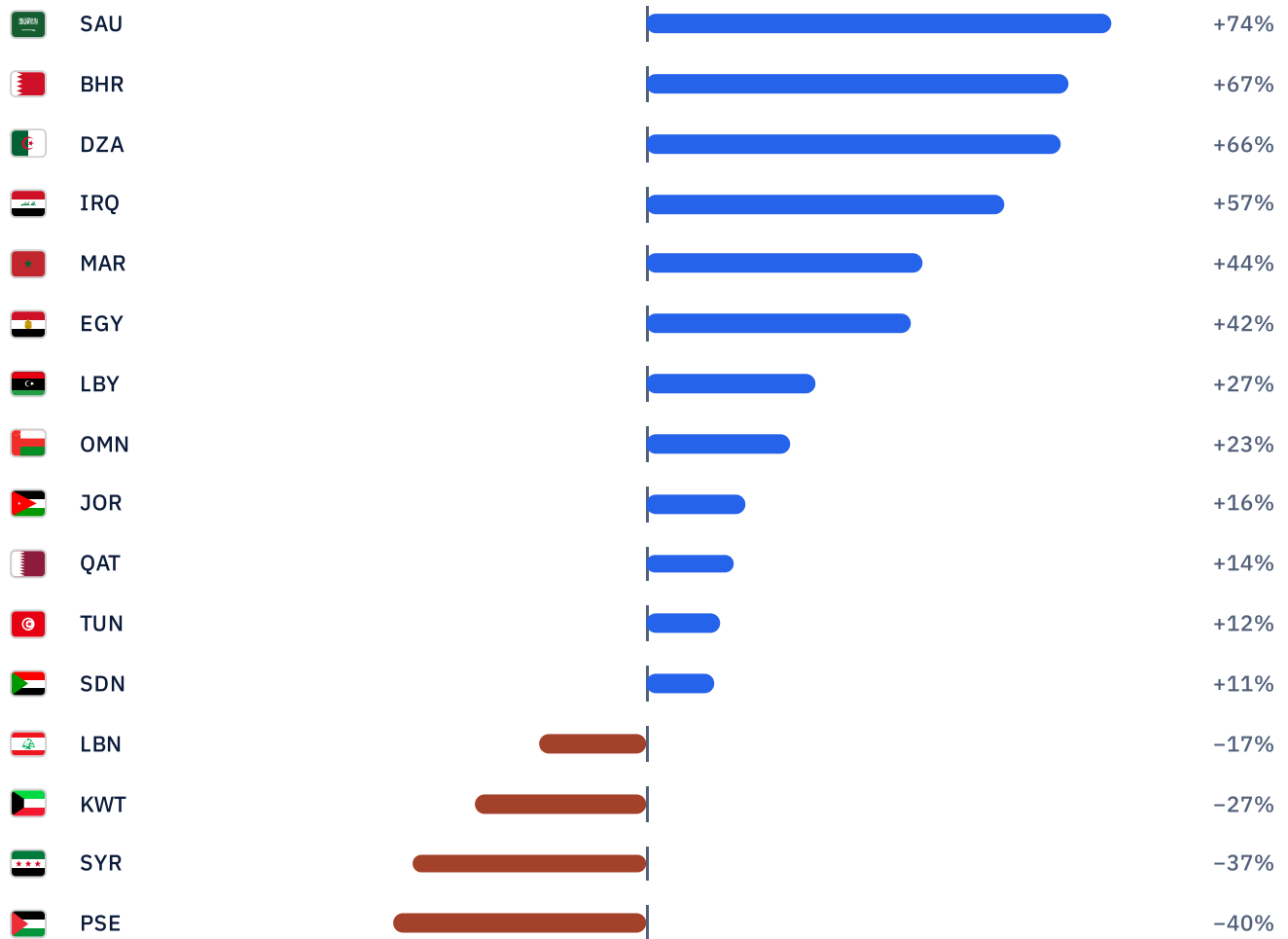
Note: UAE publication counts are not available in the 2025 release.

Source: Arab AI Governance Lab Dataset (Ben Briik et al., 2025), tables F1 and F2; OECD.AI (Scopus, fractional counts).

Box 4.1. A research community as a regulatory asset: Iraq

Iraq recorded 679 indexed AI publications in 2023, second among states with data, on reported research spending of 0.04 per cent of GDP. A prime-ministerial Supreme Committee was created in August 2024. Formal advisory links between universities and the committee would let the state draw on this expertise while data protection law is prepared.

Figure 4.2. Change in indexed AI publications, 2020 to 2023 (%)



Note: Sixteen states have counts for both years.

Source: OECD.AI (Scopus, fractional counts); author computation.

Gaps and challenges

Research output is concentrated and its distribution is shifting. Saudi Arabia, Iraq and Egypt produced 65 per cent of the 3,906 indexed publications recorded for 2023. Between 2020 and 2023 output grew by 74 per cent in Saudi Arabia, 67 per cent in Bahrain, 66 per cent in Algeria and 57 per cent in Iraq, and fell in Kuwait (27 per cent), Lebanon (17 per cent), the Syrian Arab Republic (37 per cent) and the State of Palestine (from five publications to three). Of all the correlates of regulatory stage examined in this report, research output is the weakest (Spearman $\rho = 0.66$, against 0.84 for AI readiness), which confirms that scientific communities and regulatory institutions develop along separate tracks.

Research spending does not predict output. Among the eight states that report both, Egypt (1.03 per cent of GDP, 669 publications) and Tunisia (0.75 per cent, 357) combine spending with output, Saudi Arabia produces the most on 0.56 per cent, and Iraq produces 679 publications on 0.04 per cent. Output at that level of

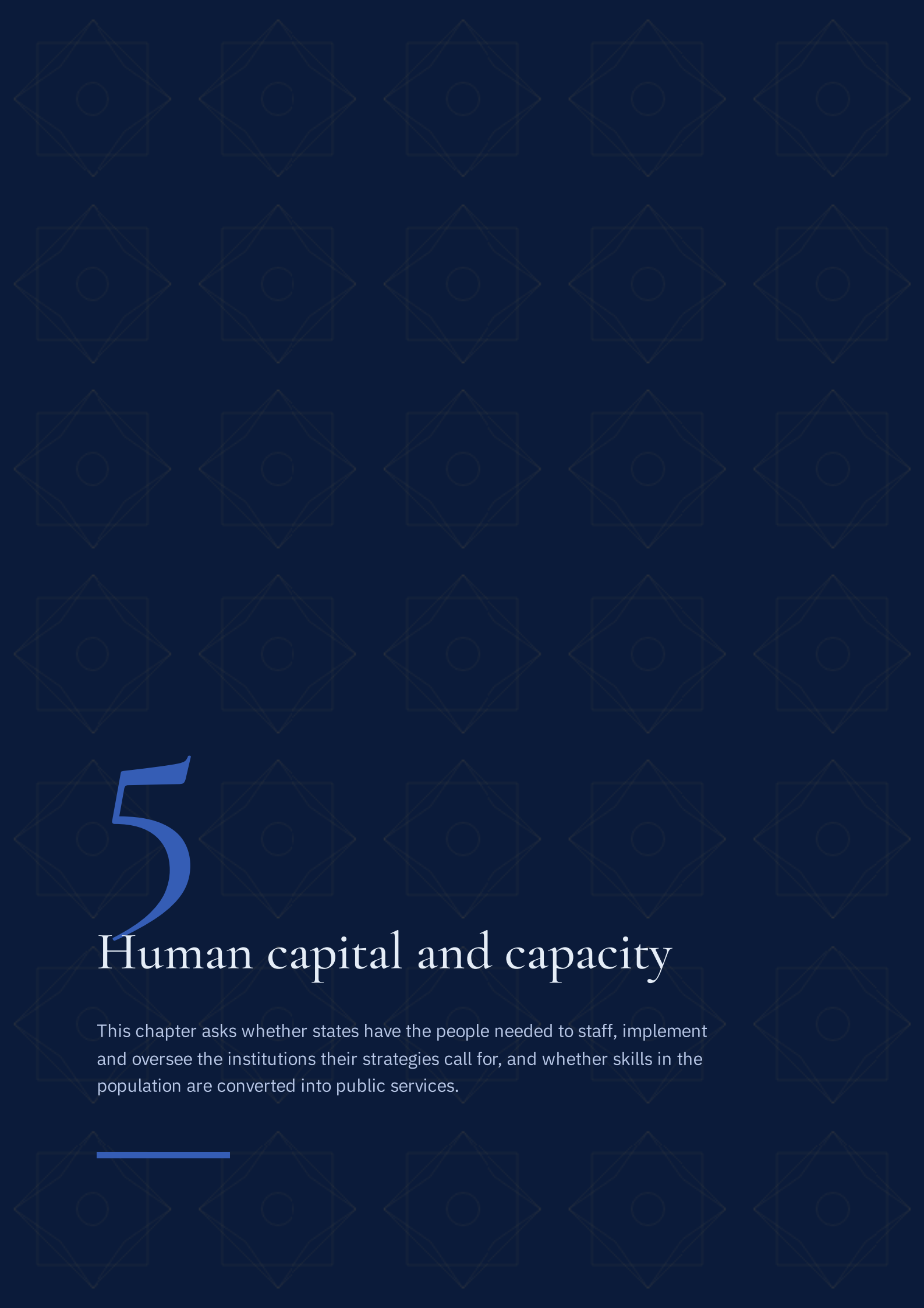
spending rests on the effort of university staff, not on funded programmes, which makes it fragile and leaves it unconnected to the policy process.

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5

Human capital and capacity

This chapter asks whether states have the people needed to staff, implement and oversee the institutions their strategies call for, and whether skills in the population are converted into public services.

Key messages

- The UAE gained 0.26 and Saudi Arabia 0.10 on the UN Human Capital Index between 2018 and 2024.
- Human capital fell in eight of 16 states with data, including every fragile or conflict-affected state.
- Strategies depend on specialist and front-line administrative capacity; where human capital is under pressure, implementation support matters most.
- E-participation ranges from 0.96 to 0.01 across the region.

+0.26

UAE Human Capital Index gain

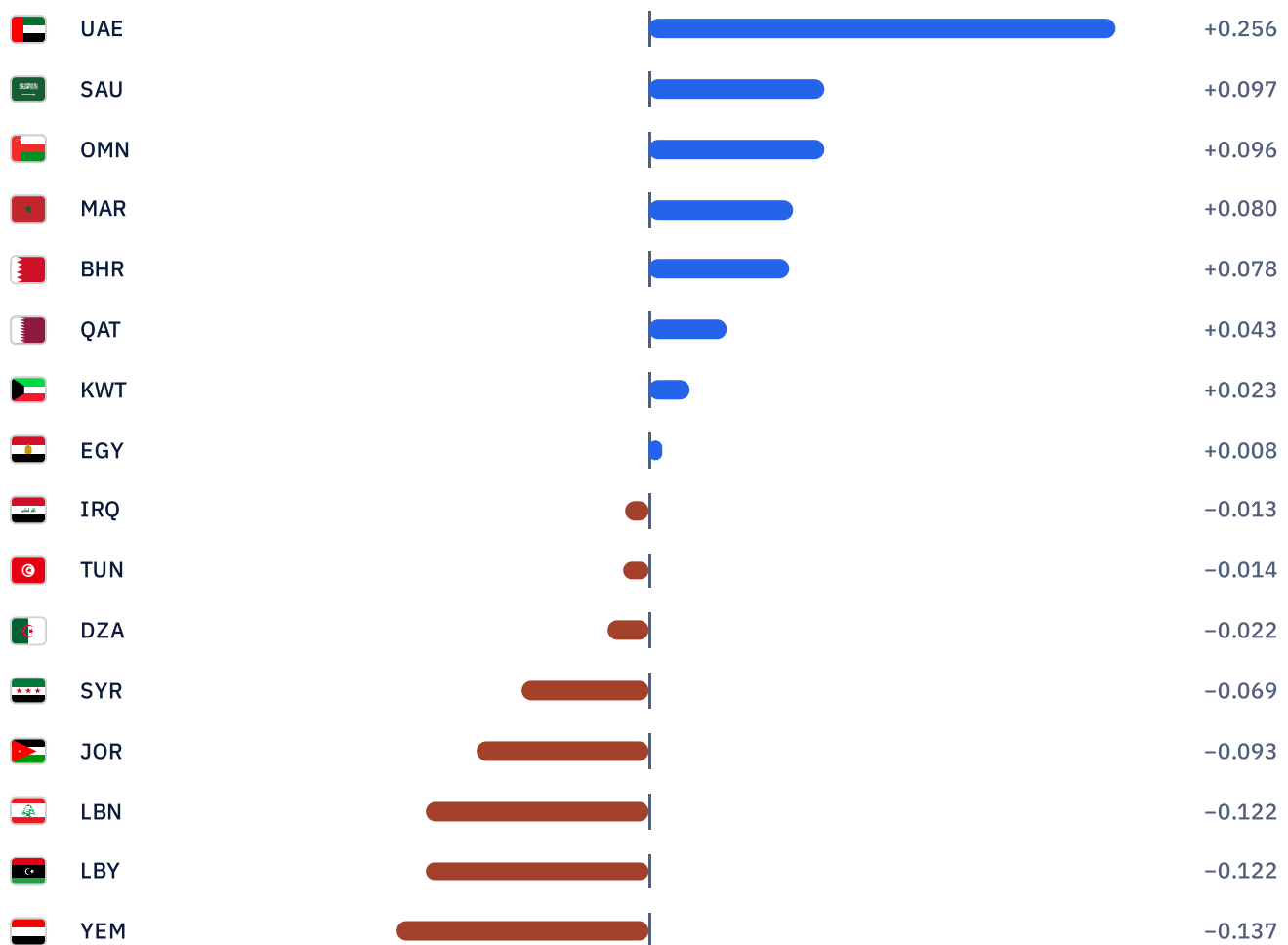
8 of 16

states where human capital fell

0.96

highest e-participation score

Figure 5.1. Human Capital Index, change 2018 to 2024



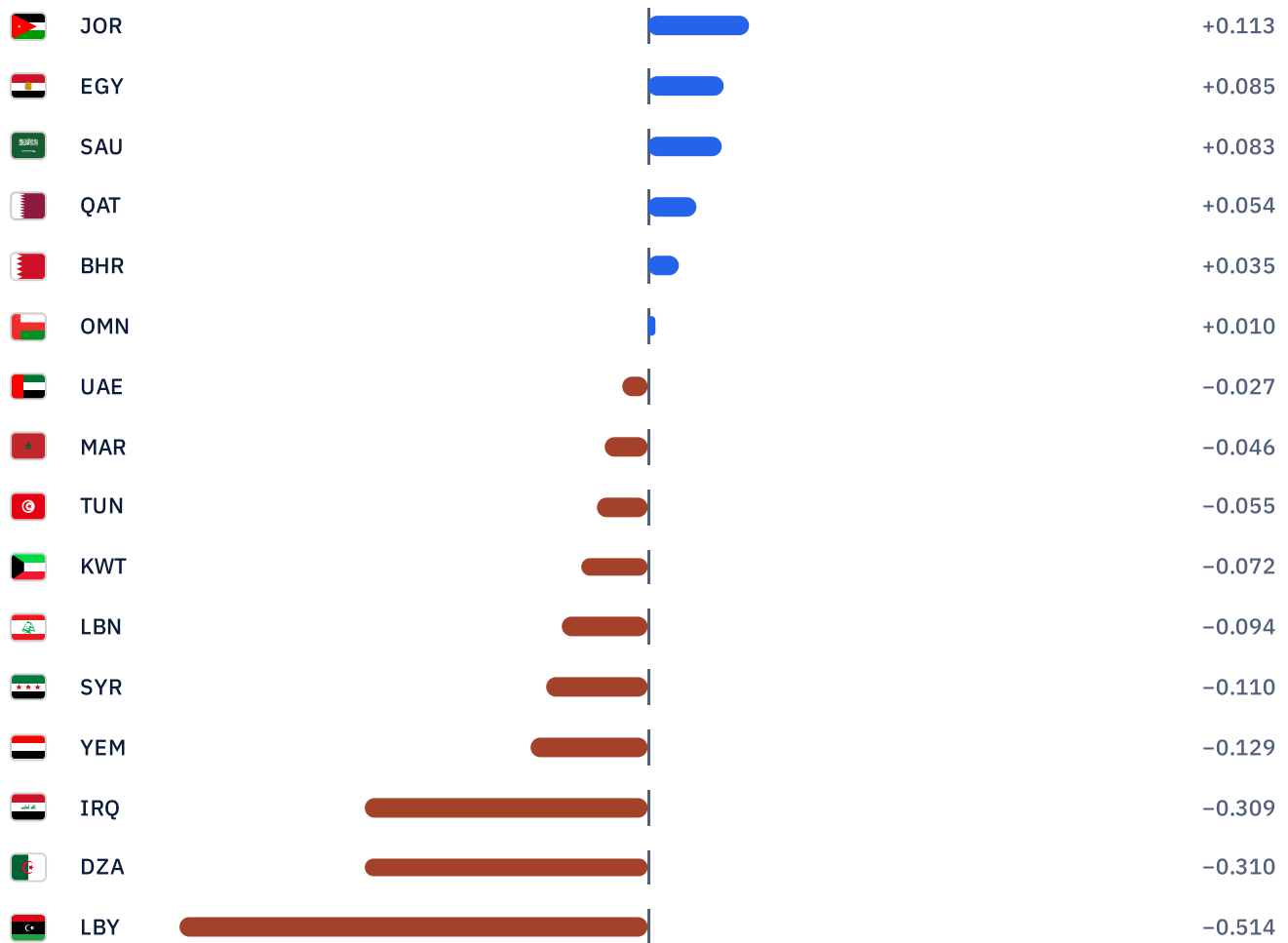
Note: Sixteen states have sub-index data.

Source: UN DESA (2018, 2024); author computation.

The United Arab Emirates gained 0.26 and Saudi Arabia 0.10. Human capital fell in eight of 16 states, including every fragile or conflict-affected state with data. Strategies depend on regulators, engineers and civil servants to carry them out; where human capital is under pressure, implementation support and regional training programmes matter most.

The erosion is largest exactly where public administration will need to be rebuilt.

Figure 5.2. Online Services Index minus Human Capital Index, 2024



Note: A positive value means that online service delivery exceeds what the human capital score would suggest.

Source: UN DESA (2024); author computation.

Gaps and challenges

The human capital evidence is sharper. The regional mean of the Human Capital Index was flat between 2018 and 2024 (0.645 to 0.651), but the average conceals a split: the Gulf states gained 0.099 on average, while Iraq, Lebanon, Libya, the Syrian Arab Republic and Yemen lost 0.092. The erosion is largest exactly where public administration will need to be rebuilt. For these states the constraint on AI governance is not the absence of a strategy but the availability of trained officials to staff any institution a strategy might create.

A comparison of the Online Services Index with the Human Capital Index shows which administrations convert skills into services. Jordan (+0.113), Egypt (+0.085) and Saudi Arabia (+0.083) deliver more online than their human capital score would suggest. Libya (-0.514), Algeria (-0.310) and Iraq (-0.309) have human capital that is not reflected in digital services. For AI governance the second group is the more telling: the skills exist in the population but not in the machinery of government. E-participation rises with regulatory stage ($r = 0.71$), with exceptions in both directions.

References

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6

Digital infrastructure

This chapter reviews connectivity and network architecture as preconditions for AI in the public sector, and asks how far infrastructure is matched by governance frameworks.



Key messages

- Six states report internet use above 95 per cent of the population.
- Internet use in Iraq rose by 47.8 percentage points between 2018 and 2023, the fastest expansion in the region.
- Connectivity and AI governance are decoupled: two states with telecom infrastructure scores above 0.96 have no AI strategy coded.
- Kuwait and Mauritania rely almost wholly on mobile networks, which has implications for resilience.

6

states above 95% internet use

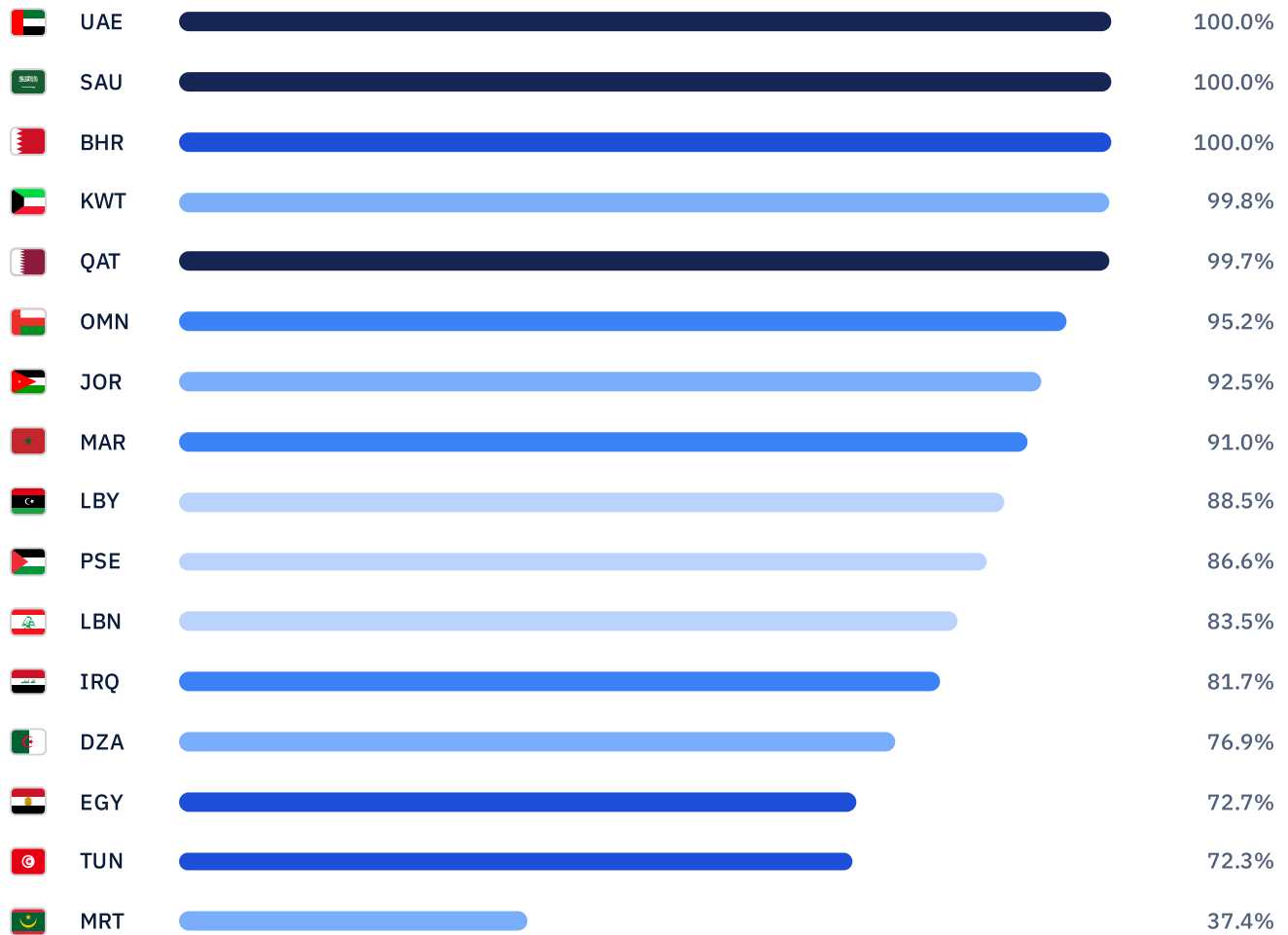
+47.8 pp

internet use, Iraq 2018 to 2023

1.000

UAE telecom infrastructure index

Figure 6.1. Internet users, 2023 (% of population)

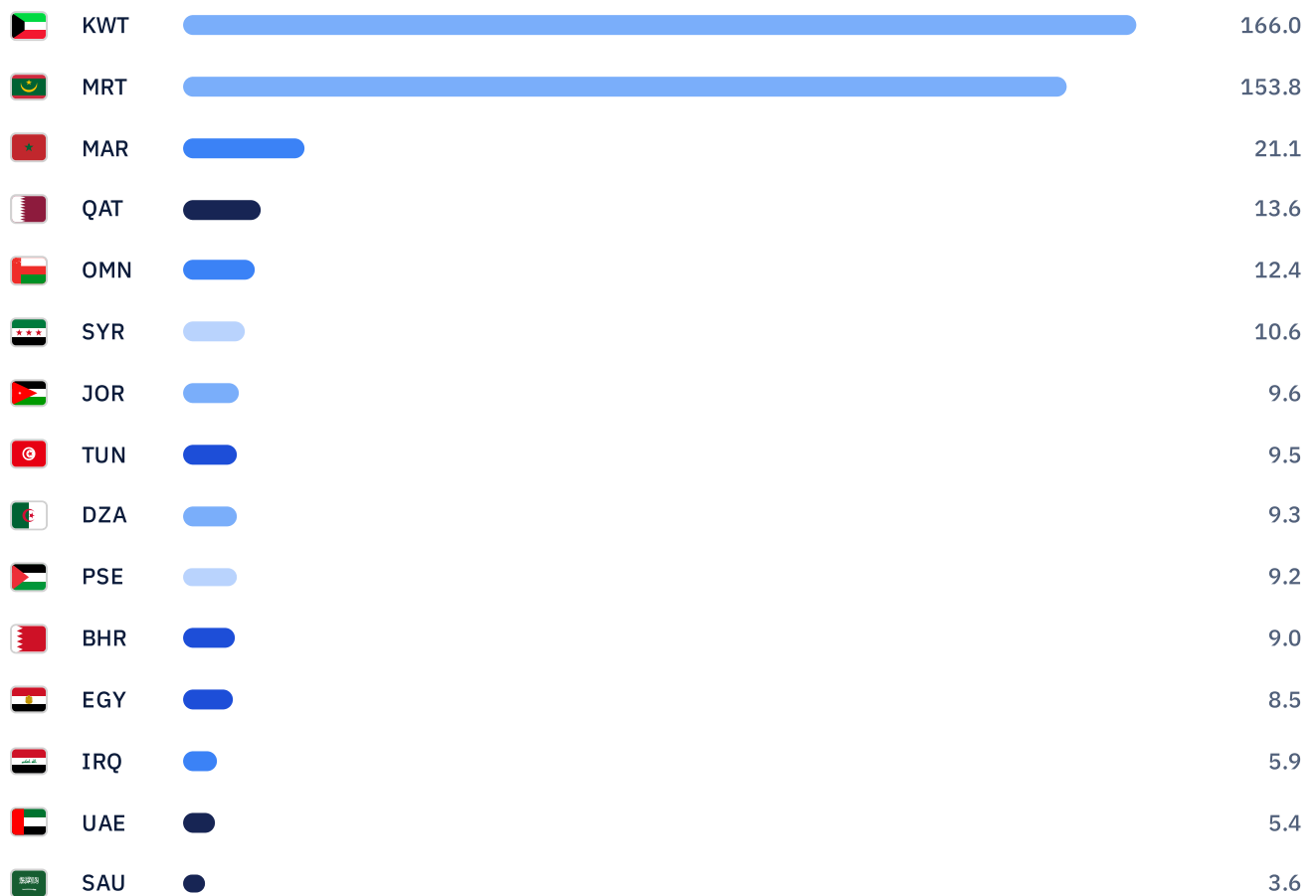


Note: Sudan, the Syrian Arab Republic and Yemen report no recent value; a missing value is not a low value.

Source: World Bank (2023).

Six states report internet use above 95 per cent. Internet use in Iraq rose by 47.8 percentage points between 2018 and 2023, and Morocco, Jordan, Egypt and Algeria each added more than 25 points. Connectivity has expanded faster than AI frameworks: two states with telecom infrastructure scores above 0.96 have no AI strategy coded.

Figure 6.2. Mobile subscriptions per fixed broadband subscription, 2023



Note: Fifteen states report both series.

Source: World Bank (2023); author computation.

Gaps and challenges

Network architecture adds a resilience dimension. Kuwait records 166 mobile subscriptions for every fixed broadband subscription and Mauritania 154, against a ratio below 10 in nine of the 15 states with data. Data-intensive public sector AI depends on fixed capacity; where it is thin, cloud and data-centre strategies carry more of the load. In five states (Algeria, Iraq, Libya, the Syrian Arab Republic and Yemen) the Online Services Index is below 0.35 and e-participation below 0.20, so the public-facing digital state on which AI services would be built is still to be developed.

Infrastructure is the weakest correlate of regulatory stage among the capacity measures: internet use correlates with stage at $r = 0.30$ and the telecom infrastructure index at $r = 0.60$. Six states added more than 20 percentage points of internet use in five years (Iraq, Algeria, Jordan, Morocco, Egypt and the State of Palestine), so a large share of users came online before any framework for automated decision-making existed.

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World Bank. (2023). *World Development Indicators*. World Bank.



7

Cybersecurity

This chapter examines cybersecurity capacity as an enabling condition for trustworthy AI in the public sector, using two indices that rest on different kinds of evidence.

Key messages

- Five states score above 94 on the ITU Global Cybersecurity Index: Saudi Arabia, the UAE, Oman, Egypt and Qatar.
- Eight states score below 36, most of them in fragile or conflict-affected contexts.
- The ITU index and the National Cyber Security Index agree fairly well ($r = 0.83$, $n = 15$) but diverge for several Gulf states.
- Strong cybersecurity institutions, as in Oman, can serve as a platform for AI oversight where dedicated bodies are still thin.

5

states above 94 on the ITU index

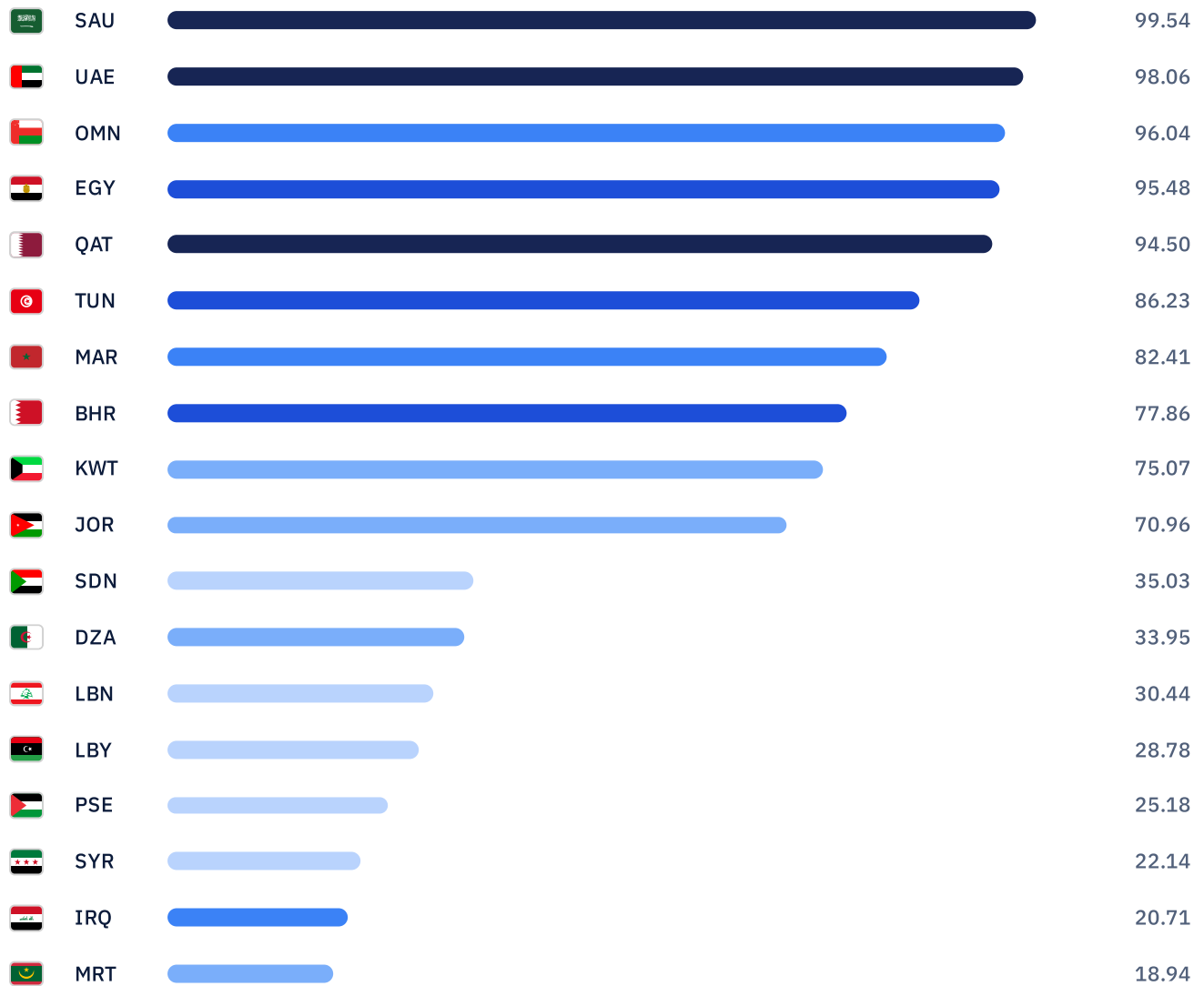
$r = 0.83$

agreement between two indices

96.04

Oman ITU score

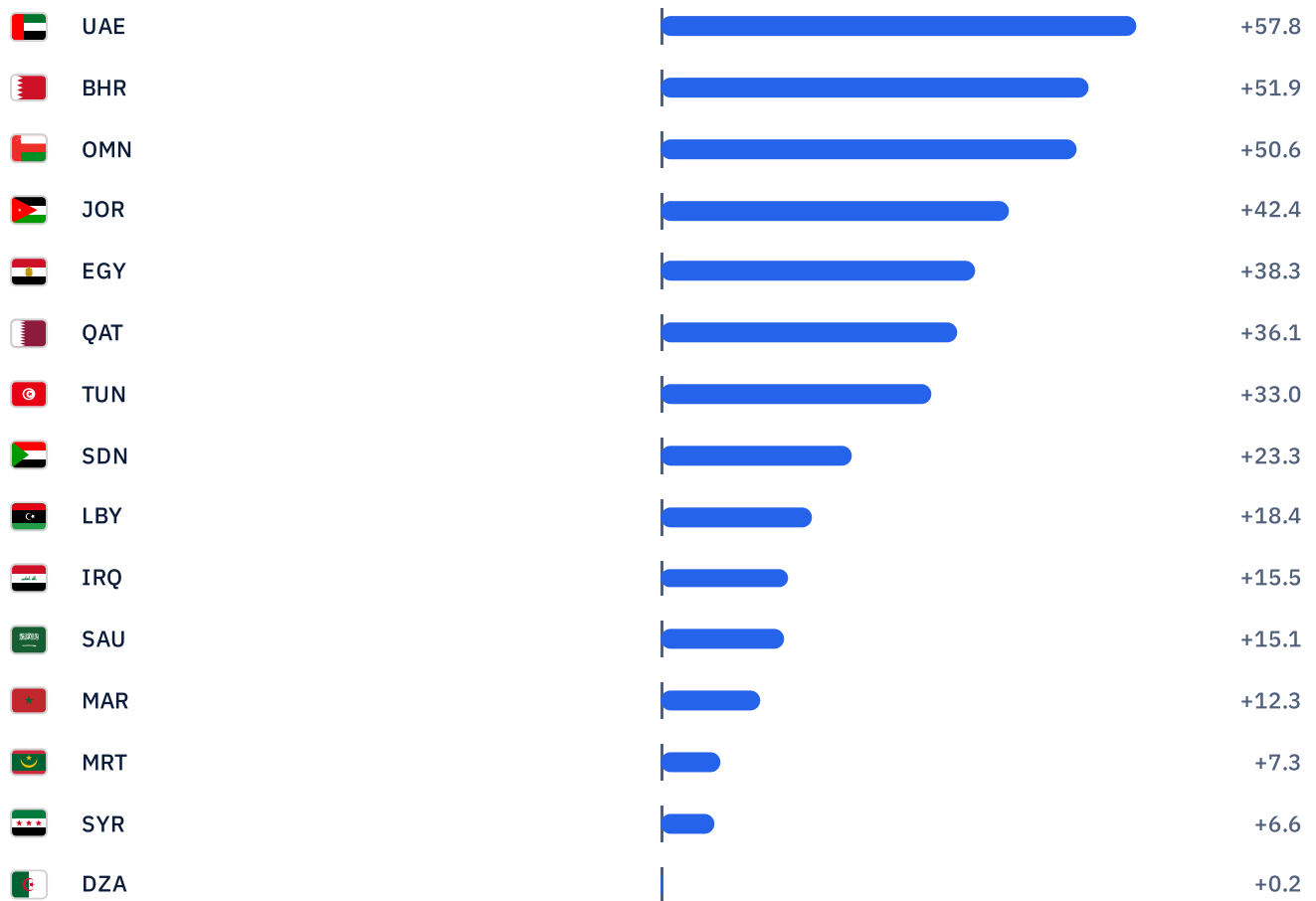
Figure 7.1. ITU Global Cybersecurity Index



Source: ITU (2024).

Five states score above 94 on the ITU index: Saudi Arabia, the United Arab Emirates, Oman, Egypt and Qatar. The ITU index and the National Cyber Security Index agree fairly well across the region ($r = 0.83$, $n = 15$). Where cybersecurity institutions are strong and AI bodies are still thin, as in Oman, the former can host early AI oversight functions.

Figure 7.2. Difference between ITU GCI and NCSI scores (points)



Note: Fifteen states have both scores.

Source: ITU (2024); e-Governance Academy (n.d.); author computation.

Gaps and challenges

The two cybersecurity indices rest on different evidence. The ITU index records commitments across legal, technical, organisational, capacity and cooperation pillars, largely from national questionnaires; the National Cyber Security Index scores publicly verifiable evidence of implemented measures. The difference between them is therefore informative. It exceeds 50 points in the United Arab Emirates (57.8), Bahrain (51.9) and Oman (50.6) and 40 points in Jordan (42.4), and is close to zero in Algeria (0.2). Saudi Arabia is the only state above 80 on both. A large difference does not show weak security; it shows that implemented capacity is less visible in public evidence than declared commitments, which matters once AI systems run on the same infrastructure.

The National Cyber Security Index is published with a Digital Development Level, and the difference between the two indicates whether security keeps pace with digitalisation. Morocco (+23.2), Saudi Arabia (+20.5) and Egypt (+10.2) secure more than their level of digital development would predict. Bahrain (−39.2), Libya (−30.7), the United Arab Emirates (−28.6) and Jordan (−25.5) have digitalised faster than their publicly documented security measures. In these states public sector AI would run on foundations whose security is the least documented.

References

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8

Language, culture and communication

This chapter considers AI as a cultural and communicative matter: Arabic language models, the sources of national ethics frameworks, and the governance of AI systems that mediate public communication.

Key messages

- Five states are coded as pursuing sovereign Arabic language-model programmes: the UAE, Saudi Arabia, Qatar, Egypt and Tunisia.
- National ethics documents draw mainly on OECD, UNESCO, IEEE and EU texts; an ethics framework grounded in regional jurisprudential traditions is an open opportunity.
- Regulatory sandboxes concentrate on finance and health; AI systems that mediate public communication are largely outside current frameworks.
- Eight states have a formal risk classification scheme.

5

sovereign Arabic language-model programmes

8

risk classification schemes

3

states referencing the GCC ethics manual

Figure 8.1. States coded as pursuing a sovereign Arabic language-model programme



Note: Highlighted: the United Arab Emirates, Saudi Arabia, Qatar, Egypt and Tunisia.

Source: Arab AI Governance Lab Dataset (Ben Briq et al., 2025), table F1 and qualitative profiles D1.

Box 8.1. Five national approaches to Arabic language models

United Arab Emirates. Falcon was released with open weights; Jais was developed with Arabic as a core language.

Saudi Arabia. ALLaM and the national AI company HUMAIN link language technology to Vision 2030 and Arabic content.

Qatar. Fanar is the national Arabic model, developed within a sector-by-sector approach to AI adoption.

Egypt. The National AI Strategy 2025 to 2030 plans domain-specific Arabic models for health, law and agriculture.

Tunisia. Coded in table F1 of the dataset as pursuing a national programme.

National ethics documents draw mainly on OECD, UNESCO, IEEE and EU texts, and the GCC AI Ethics Manual (2020) follows the same sources. An ethics framework grounded in regional jurisprudential traditions, such as *maqāṣid al-sharīʿa*, is an open opportunity for regional leadership.

Regulatory sandboxes concentrate on finance and health. Recommendation systems, conversational agents and content moderation fall largely outside existing frameworks, and eight states have a formal risk classification scheme, the basic instrument for extending oversight to these systems.

Gaps and challenges

The gap in this area is one of coverage. Instruments are concentrated where risks are most legible to regulators (finance, health, personal data) and thinnest where AI shapes public communication. Language capacity is similarly concentrated: the five states with sovereign language-model programmes include all three Advanced states, so Arabic language resources are being built where governance capacity is already highest. For the remaining 17 states the realistic route to linguistic and cultural fit is shared regional infrastructure: open corpora, evaluation benchmarks that cover Arabic dialects, and common procurement requirements for performance in Arabic.

The sources of ethical guidance are external and recent. As coded in the dataset, seven states reference the UNESCO Recommendation on the Ethics of Artificial Intelligence, seven show the influence of the EU AI Act, three reference the GCC ethics manual and one adheres to the OECD principles. None of the documents coded draws primarily on regional jurisprudence, which leaves room for a regional contribution to the global debate and not only for the reception of it.

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9 Governance models

This chapter describes how AI governance is organised as an institutional practice where a model exists: the locus of authority, the regulatory approach, the enforcement arrangement and the posture on sovereignty.

Key messages

- Seven states place AI authority at prime-ministerial, federal or ministerial level.
- Three distinct Gulf models coexist: soft law with procurement levers (UAE), binding data protection with direct enforcement (Saudi Arabia), and binding sector rules in finance (Qatar).
- Egypt, Tunisia and Morocco reach high data protection scores without high income: an institutional pathway that is not contingent on fiscal capacity.
- Ten of the 19 states displayed have not so far defined a governance type for AI.

7	3	0.80+
states with centralised AI authority	distinct Gulf governance models	data protection scores in Egypt, Tunisia, Morocco

Where a model exists, authority sits at the centre of government. Saudi Arabia, Qatar and Iraq place AI under prime-ministerial authority, the United Arab Emirates under a federal portfolio, Egypt and Bahrain under a ministry, and Tunisia under a council attached to the head of government; Morocco is the only multi-stakeholder arrangement and Oman is coded as fragmented. Centralisation is common to the three Advanced states and to Iraq, which shows that the institutional form travels more easily than the capacity behind it.

Enforcement is where models diverge most. Nine different enforcement arrangements are coded for the nine states with a defined model, from procurement levers to direct fines, and no two states share one. The region has converged on where authority sits and has not converged on how rules are made to bind.

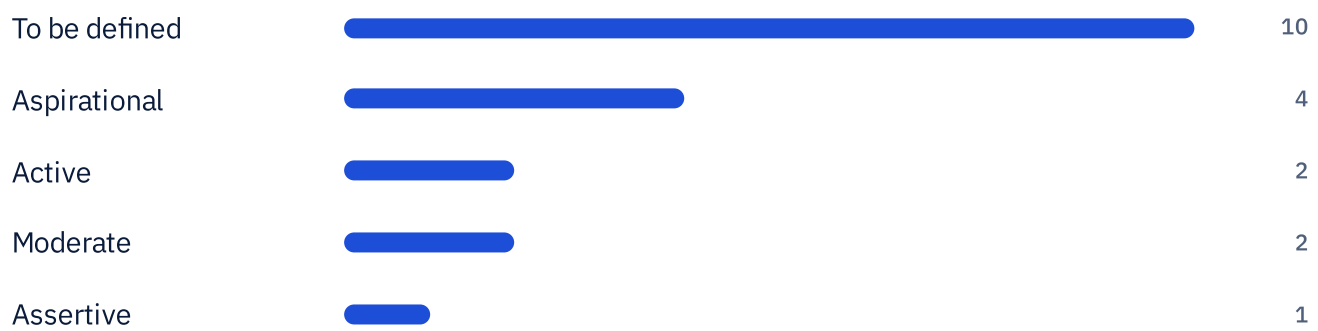
Table 9.1.
Governance arrangements of states with a defined model

State	Governance type	Regulatory approach	Enforcement model	Sovereignty posture
 UAE	Centralised, federal	Soft law and experimental legislation	Indirect (procurement)	Active
 SAU	Centralised, prime-ministerial level	Hybrid (binding PDPL, soft AI guidance)	Direct (SDAIA fines)	Assertive
 QAT	Centralised, prime-ministerial level	Hybrid (ethics guidance, binding in finance)	Sectoral (QCB binding)	Moderate
 BHR	Ministerial	Licensing-based (draft AI law)	Proposed (custodial and financial penalties)	Aspirational

State	Governance type	Regulatory approach	Enforcement model	Sovereignty posture
 OMN	Fragmented	Strategic vision only	To be defined	Aspirational
 EGY	Centralised, ministerial	Phased, soft to hard	Supervisory (MCIT)	Active
 MAR	Multi-stakeholder	Horizontal framework law	Graduated sanctions	Moderate
 TUN	Prime-ministerial council	Hybrid (hard law and sandboxes)	Bifurcated (INPDP and Decree-Law 2022-54)	Aspirational
 IRQ	Centralised, prime-ministerial level	Agile governance and sectoral sandbox	No AI-specific penalties	Aspirational

Note. Lab typology matrix (M3); manual coding from primary documents.

Figure 9.1. Sovereignty posture of the 19 states displayed



Source: Arab AI Governance Lab Dataset (Ben Brik et al., 2025), typology matrix M3.

References

Ben Brik, A., Gilbert, N., & Pycińska, M. (2025). *Arab AI Governance Lab Dataset* [Data set]. Harvard Dataverse. <https://doi.org/10.7910/DVN/MOVIFA>

10

Pathways and the capacity and regulation gap

This chapter turns from description to explanation. It summarises the configurational analysis of the 22 cases, presents three routes to AI governance, and draws three insights that income, research output and composite scores each miss.

Key messages

- With 22 cases, governance outcomes are best understood as the product of combinations of conditions, and more than one route leads to the same outcome.
- Three routes are identified: a resource-led route, an institutional route and a research-led route.
- The institutional route, followed by Egypt and Tunisia, shows that high income is not a precondition for an Intermediate or higher stage.
- Income, research output and composite scores are each insufficient as single predictors.

The analysis uses fuzzy-set Qualitative Comparative Analysis (Ragin, 2008; Schneider & Wagemann, 2012). Conditions are calibrated as set memberships between 0 and 1: state capacity, economic resources, digital infrastructure, data protection, international alignment and research output, among others.

Box 10.1. Three routes to AI governance

Resource-led route (United Arab Emirates, Saudi Arabia, Qatar): high economic resources combined with state capacity and digital infrastructure.

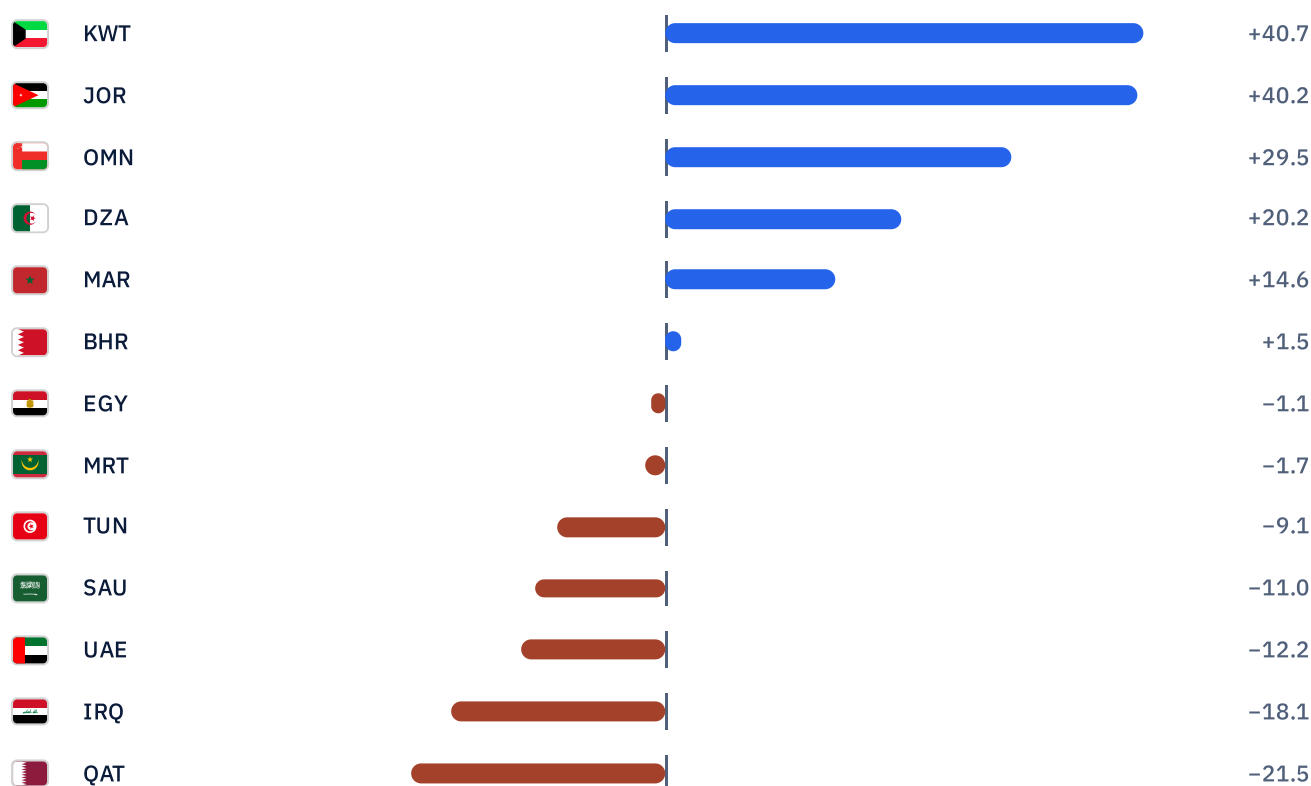
Institutional route (Egypt, Tunisia): data protection law, international alignment and research output, without high income.

Research-led route (Iraq): high research output ahead of state capacity and data protection, reaching partial membership in the outcome (0.45).

The capacity and regulation gap

A simple diagnostic separates two governance problems that the index averages away. For each state, the mean of the three capacity pillars (readiness, digital government, cybersecurity) is compared with the regulation pillar (Figure 10.1). A positive difference indicates latent capacity: administrative and technical capacity ahead of the institutionalisation of AI governance. A negative difference indicates regulation ahead of capacity.

Figure 10.1. Mean capacity minus regulation score, states above the Nascent stage (points)



Note: Capacity is the mean of the readiness, digital government and cybersecurity pillars available for each state.

Source: Author computation from the index pillars.

Latent capacity. Kuwait (+40.7), Jordan (+40.2), Oman (+29.5), Algeria (+20.2) and Morocco (+14.6) have capacity that their regulatory stage does not reflect. In these states the obstacle is a decision, not a deficit: a lead body, a strategy and a data protection statute could be put in place with the administrative means already available.

Regulation ahead of capacity. Iraq (−18.1) and Tunisia (−9.1) have adopted strategies, bodies and instruments that outrun measured administrative capacity. This is the configuration in which formal adoption is most likely to decouple from practice, and in which investment in implementation (staffing, online services, cybersecurity) will yield more than further instruments. The negative values for Qatar (−21.5), the United Arab Emirates (−12.2) and Saudi Arabia (−11.0) partly reflect the ceiling of the regulation scale, but they also identify where capacity is lowest relative to ambition: AI readiness in all three, and digital government in Qatar.

Bahrain (+1.5), Egypt (−1.1) and Mauritania (−1.7) are in balance, at very different levels. For the nine Nascent states the regulation pillar is zero, so the difference equals mean capacity; it ranges from 39.7 in Lebanon and 37.3 in Libya to 18.8 in Yemen, a reminder that the Nascent stage covers very different starting points.

In latent-capacity states the obstacle is a decision, not a deficit.

Three insights

Resources alone do not produce a framework. Kuwait combines a GDP per capita of US\$34,076 and 99.75 per cent internet use with no strategy or dedicated body coded, while the five other Gulf states have both. The deciding factor is institutional choice, and progress can be rapid once a lead body is designated.

Research capacity can run ahead of regulation. Iraq, Jordan and Algeria hold research communities larger than their regulatory stage would suggest. These communities are an asset for regulators.

Composite scores can lag institutional change. The Lebanese readiness score rose between 2020 and 2023 during a severe economic crisis, then fell by 13.36 points by 2025.

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II

The way forward

This chapter sets out policy directions differentiated by stage. It organises action under four headings, foundations, institutions, instruments and engagement, and closes with options for regional co-operation.



Key messages

- No single template fits 22 states; advice should follow the stage and the route of each state.
- Sequence matters: data protection, cybersecurity and digital government come before AI-specific instruments.
- Designating a lead body is the fastest single step available to states at the Initial stage.
- Regional bodies can lower costs for smaller administrations through shared tools.

International guidance organises policy action for AI in government around enablers, guardrails and engagement (OECD, 2025). The evidence in this report suggests a complementary ordering for the Arab region, in which foundations and institutions precede instruments.

Table 11.1.

Policy directions by stage

Stage	Foundations	Institutions	Instruments	Engagement
Advanced	Maintain data and compute investment; open public datasets in Arabic	Give oversight bodies operational independence	Move from guidance to binding obligations for high-risk public uses; registers of algorithmic systems	Publish evaluations; lead regional standard-setting
Intermediate	Fund data protection authorities	Resource second-generation strategies with implementation budgets	Risk classification; sandboxes beyond finance and health	Structured consultation with universities and firms
Emerging	Complete data protection law	Clarify mandates between the lead body and sector regulators	Sector pilots with evaluation built in	Formal advisory role for research communities
Initial	Build on existing connectivity and cybersecurity capacity	Designate a lead body	Adopt a national strategy with a small number of funded priorities	Peer learning with neighbouring states
Nascent	Basic digital government, data protection and cybersecurity	A focal point within an existing ministry	Defer AI-specific instruments until an institution can implement them	Partner support aligned with national plans

Note. Author synthesis of chapters 1 to 10.

Priority gaps and recommendations

Table 11.2.

Priority gaps, evidence and recommendations

Gap	Evidence	States most concerned	Recommendation	Indicator to track
Institutional inequality	Coefficient of variation of 0.89 on regulation, against 0.30 to 0.52 on capacity pillars; ten of 19 states without a dedicated body	Initial and Nascent states	Designate a lead body before drafting instruments; instruments follow bodies ($r = 0.97$)	States with a dedicated body
Latent capacity	Capacity exceeds regulation by 14.6 to 40.7 points	Kuwait, Jordan, Oman, Algeria, Morocco	Fast-track strategy, lead mandate and data protection statute with existing administrative means	Capacity and regulation difference below 15 points
Regulation ahead of capacity	Regulation exceeds capacity by 9.1 to 18.1 points; online services below 0.20 in Iraq	Iraq, Tunisia	Shift spending from new instruments to implementation: staffing, online services, cybersecurity; evaluate instruments already adopted	Online Services Index; NCSI score
Divergence	Dispersion of readiness scores up from 14.07 to 17.40 (2020 to 2025); EGDI gap between Gulf and other states up from 0.303 to 0.333	Whole region	Regional peer learning and pooled model instruments so that late adopters do not start from zero	Standard deviation of readiness scores
Human capital erosion	Human Capital Index down 0.092 on average in five fragile or conflict-affected states; up 0.099 in the Gulf	Iraq, Lebanon, Libya, Syrian Arab Republic, Yemen	Regional training programme for regulators and civil servants; retention measures for technical staff	Human Capital Index
Research and regulation disconnect	Research output is the weakest correlate of regulatory stage ($p = 0.66$); 65 per cent of output in three states	Iraq, Jordan, Algeria, Egypt	Formal advisory mechanisms linking universities to AI authorities	States with a statutory scientific advisory mechanism
Commitment and implementation in cybersecurity	ITU and NCSI scores differ by more than 40 points in four states	United Arab Emirates, Bahrain, Oman, Jordan	Publish evidence of implemented controls; align AI deployment with verified security baselines	NCSI score
Concentration of Arabic language resources	Five sovereign language-model programmes, all three Advanced states among them	Seventeen states without a programme	Pooled open corpora, dialect benchmarks and common procurement requirements for Arabic performance	States with access to shared Arabic resources

Gap	Evidence	States most concerned	Recommendation	Indicator to track
Data gaps	Three states without displayed indicators; UAE publication counts missing; data protection coding under review	Comoros, Djibouti, Somalia, United Arab Emirates	Invest in statistical reporting to international panels; open national AI registers	States covered on all four pillars

Note. Author synthesis of chapters 1 to 10; all figures are reported in the chapters indicated.

Recommendations by actor

Centres of government. Treat AI governance as a machinery-of-government question: assign a single lead mandate, fund it, and require sector regulators to coordinate through it.

Regulators and data protection authorities. Build enforcement capacity before extending the rulebook; publish decisions and enforcement data so that compliance can be observed.

Legislatures. Where draft AI laws are under consideration, legislate implementing capacity and review clauses alongside obligations.

Regional organisations. Provide shared instruments (risk classification, procurement clauses, incident reporting) and a regional training programme, which lower entry costs for smaller administrations.

International partners. Align support with absorptive capacity and with the sequence set out in this report; avoid financing strategy documents that no institution is mandated to implement.

Instruments follow institutions: designate the body first.

Box 11.1. What regional bodies can do

The League of Arab States, the Gulf Cooperation Council and the Digital Cooperation Organization can reduce costs for smaller administrations through a shared risk classification, model procurement clauses, a common incident reporting format, pooled Arabic language resources and a regional training programme for regulators.

Policy sequencing deserves particular attention. Evidence from other developing regions shows that adopting advanced instruments before the capacity to implement them exists can lock administrations into commitments they cannot meet (Ben Brik, 2026b).

References

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I2

Country notes

This chapter gives a short note for each of the 22 member states of the League of Arab States, in the order used throughout the report. Each note sets out the national context, the evidence and the priority, and links to a full online profile.

For capacity building on AI governance, please contact the Lab: anis.ben.brik@usi.ch.



United Arab Emirates ARE

Context. A federation with high fiscal capacity and early political commitment to AI, including a ministerial portfolio since 2017. **Evidence.** Advanced stage with eight instruments, five bodies and four international frameworks referenced, the widest alignment in the region alongside Egypt. EGDI 0.9533 (position 11). The ITU cybersecurity score is 98.06 but the NCSI score 40.26, the largest difference between the two indices in the region (57.8 points), and the readiness score slipped from 72.40 in 2020 to 69.86 in 2025. Publication counts are missing from the dataset. **Priority.** Convert soft law into enforceable obligations for high-risk public uses, document implemented cybersecurity controls, and close the data gap on research output.

Stage: Advanced. Index: 90.8 (position 2 of 19). Strategy: 2nd generation; dedicated bodies: 5; instruments: 8; data protection law: 2021. AI readiness 2025: 69.86; EGDI 2024: 0.9533 (position 11); ITU GCI: 98.06.



Saudi Arabia SAU

Context. Digital transformation is centralised under SDAIA within Vision 2030. **Evidence.** First on the index (91.8). Readiness rose 15.34 points between 2020 and 2025 and the EGDI position moved from 52 to 6. Eleven instruments and six bodies; 64 of the 91 initiatives registered with OECD.AI (70 per cent); 1,189 publications in 2023, up 74 per cent on 2020; the only state above 80 on both cybersecurity indices (99.54 and 84.42).

Priority. Independent evaluation of instruments already adopted, publication of enforcement data, and the sharing of model instruments with regional peers.

Stage: Advanced. Index: 91.8 (position 1 of 19). Strategy: 2nd generation; dedicated bodies: 6; instruments: 11; data protection law: 2021. AI readiness 2025: 71.57; EGDI 2024: 0.9602 (position 6); ITU GCI: 99.54.



Qatar QAT

Context. A small high-income state whose strongest regulator for AI purposes is the central bank. **Evidence.** Regulation is at the top of the scale while mean capacity is 78.5, the largest negative difference in the region (-21.5). Readiness fell from 63.59 to 58.61 between 2023 and 2025, the EGDI position moved from 51 to 53, e-participation stands at 0.480 and 126 publications were indexed in 2023. **Priority.** Invest in the administrative capacity behind the rules, online services and participation above all, and extend the binding approach used in finance to other high-risk sectors.

Stage: Advanced. Index: 83.9 (position 3 of 19). Strategy: 1st generation; dedicated bodies: 4; instruments: 8; data protection law: 2016. AI readiness 2025: 58.61; EGDI 2024: 0.8244 (position 53); ITU GCI: 94.50.



Bahrain BHR

Context. A small Gulf state with the most advanced legislative initiative in the region. **Evidence.** The 38-article draft AI law was approved by the Shura Council in April 2024. EGDI 0.9196 (position 18) and e-participation 0.904; capacity and regulation are in balance (+1.5). The ITU cybersecurity score (77.86) exceeds the NCSI score (25.97) by 51.9 points, and 25 publications were indexed in 2023. **Priority.** Enact the law with implementing capacity in place, build research partnerships to compensate for a small domestic research base, and evidence implemented cybersecurity measures.

Stage: Intermediate. Index: 76.1 (position 4 of 19). Strategy: 1st generation; dedicated bodies: 3; instruments: 4; data protection law: 2018. AI readiness 2025: 59.57; EGDI 2024: 0.9196 (position 18); ITU GCI: 77.86.



Kuwait KWT

Context. A high-income state with mature telecom infrastructure. **Evidence.** Mean capacity of 65.7 against a regulation score of 25 gives the largest latent capacity in the region (+40.7). Readiness fell 6.82 points between 2020 and 2025, the EGDI position moved from 41 to 66, publications fell from 22 to 16, and fixed broadband stands at 1.01 subscriptions per 100 people against 167.68 mobile subscriptions. **Priority.** Designate a lead body, adopt a national strategy and a data protection statute, all feasible with existing administrative means, and invest in fixed broadband.

Stage: Initial. Index: 55.5 (position 9 of 19). Strategy: not coded; dedicated bodies: 0; instruments: 0; data protection law: not coded. AI readiness 2025: 43.79; EGDI 2024: 0.7812 (position 66); ITU GCI: 75.07.



Oman OMN

Context. A Gulf state with strong cybersecurity institutions and a national programme approved in September 2024. **Evidence.** Latent capacity of +29.5; ITU cybersecurity score 96.04, EGDI position up from 63 to 41, readiness up 5.95 points since 2020, with one dedicated body, no AI-relevant instrument coded and a data protection statute dated 2021. **Priority.** Use cybersecurity institutions as the host for early AI oversight and issue first instruments on risk classification and public procurement.

Stage: Emerging. Index: 72.1 (position 6 of 19). Strategy: 1st generation; dedicated bodies: 1; instruments: 0; data protection law: 2021. AI readiness 2025: 56.73; EGDI 2024: 0.8576 (position 41); ITU GCI: 96.04.



Egypt EGY

Context. The most populous state in the region, lower-middle income, with a second-generation strategy (2025 to 2030). **Evidence.** Capacity and regulation are in balance (-1.1). Readiness rose 9.91 points since 2020; ITU cybersecurity score 95.48; 669 publications in 2023 (up 42 per cent) and research spending of 1.03 per cent of GDP. The constraint lies in delivery: EGDI 0.6699 (position 95) and a flat Human Capital Index (+0.008 since 2018). **Priority.** Attach implementation budgets to the strategy, raise online services and skills to the level of regulatory ambition, and resource the data protection authority.

Stage: Intermediate. Index: 74.1 (position 5 of 19). Strategy: 2nd generation; dedicated bodies: 4; instruments: 5; data protection law: 2020. AI readiness 2025: 59.10; EGDI 2024: 0.6699 (position 95); ITU GCI: 95.48.



Morocco MAR

Context. A long-standing data protection regime (2009) and multi-stakeholder governance. **Evidence.** Latent capacity of +14.6: five instruments, two bodies, the second highest NCSI score in the region (70.13) and internet use up 26.2 percentage points since 2018. Readiness stands at 43.06, publications grew 44 per cent between 2020 and 2023, and there are 21 mobile subscriptions for every fixed broadband subscription.

Priority. Move from a strategy in development to an adopted strategy with a clear lead mandate, and expand fixed broadband.

Stage: Emerging. Index: 61.0 (position 8 of 19). Strategy: 1st generation; dedicated bodies: 2; instruments: 5; data protection law: 2009. AI readiness 2025: 43.06; EGDI 2024: 0.6841 (position 90); ITU GCI: 82.41.



Tunisia TUN

Context. The earliest data protection statute in the dataset (2004), a second-generation strategy and tight fiscal conditions. **Evidence.** Regulation (75) runs ahead of mean capacity (65.9). Readiness fell from 46.07 to 42.23 between 2023 and 2025, the EGDI position moved from 80 to 87 and the Human Capital Index declined by 0.014; 357 publications and research spending of 0.75 per cent of GDP. **Priority.** Protect implementation capacity by funding the data protection authority and the lead body, retain technical staff, and clarify the interface between Decree-Law 2022-54 and the data protection framework.

Stage: Intermediate. Index: 68.2 (position 7 of 19). Strategy: 2nd generation; dedicated bodies: 3; instruments: 6; data protection law: 2004. AI readiness 2025: 42.23; EGDI 2024: 0.6935 (position 87); ITU GCI: 86.23.



Algeria DZA

Context. A large hydrocarbon economy with a growing research base. **Evidence.** Latent capacity of +20.2. Readiness rose 8.58 points since 2020, publications grew 66 per cent to 178, and the EGDI position improved from 130 to 116. Online services (0.332) and e-participation (0.055) are low, and the two cybersecurity indices agree on a low score (33.95 and 33.77). **Priority.** Adopt a strategy and designate a lead body, then raise online services and basic cybersecurity.

Stage: Initial. Index: 40.1 (position 11 of 19). Strategy: not coded; dedicated bodies: 0; instruments: 0; data protection law: not coded. AI readiness 2025: 42.05; EGDI 2024: 0.5956 (position 116); ITU GCI: 33.95.



Libya LBY

Context. Parallel administrations since 2014. **Evidence.** Infrastructure is ahead of the state: telecom index 0.964, internet use 88.5 per cent and 192.97 mobile subscriptions per 100 people, against the lowest online services (0.0808) and e-participation (0.014) scores in the region and a Human Capital Index decline of 0.122. **Priority.** A unified focal point for digital government and basic data protection; AI-specific instruments should wait for an institution able to apply them.

Stage: Nascent. Index: 28.0 (position 14 of 19). Strategy: not coded; dedicated bodies: 0; instruments: 0; data protection law: not coded. AI readiness 2025: 28.38; EGDI 2024: 0.5466 (position 125); ITU GCI: 28.78.



Mauritania MRT

Context. A lower-middle-income state with limited connectivity. **Evidence.** The only state with a strategy document and no body to implement it. Internet use 37.38 per cent, 0.59 fixed broadband subscriptions per 100 people, ITU cybersecurity score 18.94 and research spending of 0.01 per cent of GDP. **Priority.** Assign the strategy to a focal point within an existing ministry, prioritise connectivity, and align partner support with a small number of funded priorities.

Stage: Initial. Index: 23.8 (position 15 of 19). Strategy: 1st generation; dedicated bodies: 0; instruments: 0; data protection law: not coded. AI readiness 2025: 27.58; EGDI 2024: n/a; ITU GCI: 18.94.



Jordan JOR

Context. A lower-middle-income state with an established ICT services sector. **Evidence.** The second largest latent capacity in the region (+40.2). Readiness rose 14.31 points since 2020, online services score 0.7591 and 281 publications were indexed in 2023, while the Human Capital Index declined by 0.093. The dataset codes the data protection statute as draft; that coding is under review. **Priority.** Complete the data protection framework and designate a lead body, which would move Jordan at least one stage with existing capacity.

Stage: Initial. Index: 55.1 (position 10 of 19). Strategy: not coded; dedicated bodies: 0; instruments: 0; data protection law: Draft. AI readiness 2025: 56.07; EGDI 2024: 0.6849 (position 89); ITU GCI: 70.96.



Lebanon LBN

Context. A severe financial crisis since 2019. **Evidence.** Readiness moved from 47.62 to 34.26 between 2023 and 2025, the EGDI position from 99 to 126, the Human Capital Index fell by 0.121 and publications by 17 per cent; e-participation (0.466) remains above several better-resourced states. **Priority.** Preserve the human capital and research base, apply existing data protection provisions, and restore basic digital government services.

Stage: Nascent. Index: 29.8 (position 13 of 19). Strategy: not coded; dedicated bodies: 0; instruments: 0; data protection law: not coded. AI readiness 2025: 34.26; EGDI 2024: 0.5449 (position 126); ITU GCI: 30.44.



State of Palestine PSE

Context. Institutional development takes place under occupation and severe fiscal constraints. **Evidence.** Internet use 86.64 per cent, up 22.2 percentage points since 2018; readiness 35.54, up 2.40 since 2023; ITU cybersecurity score 25.18; no EGDI data; publications fell from five to three between 2020 and 2023. **Priority.** A data protection statute and cybersecurity basics, access to pooled regional resources, and inclusion in international datasets.

Stage: Nascent. Index: 20.2 (position 17 of 19). Strategy: not coded; dedicated bodies: 0; instruments: 0; data protection law: not coded. AI readiness 2025: 35.54; EGDI 2024: n/a; ITU GCI: 25.18.



Syrian Arab Republic SYR

Context. Prolonged conflict followed by political transition. **Evidence.** Readiness 21.72, up 3.60 since 2023; EGDI position from 152 to 162; Human Capital Index down 0.069; publications down 37 per cent between 2020 and 2023. **Priority.** Basic digital government and data protection, with coordinated partner support.

Stage: Nascent. Index: 20.7 (position 16 of 19). Strategy: not coded; dedicated bodies: 0; instruments: 0; data protection law: not coded. AI readiness 2025: 21.72; EGDI 2024: 0.3888 (position 162); ITU GCI: 22.14.



Iraq IRQ

Context. A reconstruction setting with an oil-dependent budget and a large university system. **Evidence.** Regulation (50) runs well ahead of mean capacity (31.9), the largest such difference outside the Advanced group (–18.1): six instruments and three bodies, against online services of 0.1876, e-participation of 0.096, an ITU cybersecurity score of 20.71 and an NCSI score of 5.19. Readiness fell 4.51 points since 2020. Publications reached 679 (up 57 per cent) on research spending of 0.04 per cent of GDP, and internet use rose 47.8 percentage points. **Priority.** Enact a data protection statute, build cybersecurity capacity, give universities a formal advisory role with the Supreme Committee, and avoid instruments that exceed administrative capacity.

Stage: Emerging. Index: 36.5 (position 12 of 19). Strategy: 1st generation; dedicated bodies: 3; instruments: 6; data protection law: not coded. AI readiness 2025: 29.37; EGDI 2024: 0.4572 (position 148); ITU GCI: 20.71.



Yemen YEM

Context. Prolonged conflict. **Evidence.** The lowest readiness score in the region (14.48, down 4.59 since 2020), EGDI 0.2318 (position 185) and the largest Human Capital Index decline (–0.137). **Priority.** Basic services and connectivity with partner support; AI-specific instruments are premature.

Stage: Nascent. Index: 12.6 (position 19 of 19). Strategy: not coded; dedicated bodies: 0; instruments: 0; data protection law: not coded. AI readiness 2025: 14.48; EGDI 2024: 0.2318 (position 185); ITU GCI: n/a.



Sudan SDN

Context. Armed conflict since April 2023. **Evidence.** Readiness fell from 26.35 to 16.21, the largest decline in the region (–10.14); ITU cybersecurity score 35.03 and NCSI score 11.69; 20 publications in 2023. **Priority.** Preserve digital public infrastructure, records and human capital until institutional development can resume.

Stage: Nascent. Index: 17.1 (position 18 of 19). Strategy: not coded; dedicated bodies: 0; instruments: 0; data protection law: not coded. AI readiness 2025: 16.21; EGDI 2024: n/a; ITU GCI: 35.03.



Djibouti DJI

Indicator values are not displayed in the 2025 release.

Stage: Nascent. Not scored on the index.



Somalia SOM

Indicator values are not displayed in the 2025 release.

Stage: Nascent. Not scored on the index.



Comoros COM

Indicator values are not displayed in the 2025 release.

Stage: Nascent. Not scored on the index.

Annex A. Methodology

Dataset

The Arab AI Governance Lab Dataset (doi:10.7910/DVN/MOVIFA) holds thirteen linked tables: a 46-variable regulatory cross-section (F1) coded from primary documents, country-year panels (F2, F3, F5, F6, F8), cross-sections on economic resources and cybersecurity (F4, F7), fuzzy-set tables (C1, C2), qualitative profiles (D1), a typology matrix (M3) and a codebook (Z1). All tables share the ISO3 country code as key.

Stages

Stages are cumulative. The labels Initial and Nascent used in this report correspond to the codes Minimal and Absent in table F1.

Limitations

(i) Indicator values for Comoros, Djibouti and Somalia are not displayed. (ii) UAE publication counts are missing. (iii) The Oxford Insights 2025 edition revised its method. (iv) 2024 publication counts are incomplete. (v) Regulatory coding reflects documents identified up to the release date and is under review for several data protection statutes. (vi) The index is equal-weighted; alternative weights would change some positions.

Annex B. Data tables

Table B.1.

Regulatory indicators

State	Stage	Strategy (generation)	Data protection law	Instruments	Bodies	International frameworks	OE initi
 UAE	Advanced	2nd	2021	8	5	4	
 SAU	Advanced	2nd	2021	11	6	3	
 QAT	Advanced	1st	2016	8	4	3	
 BHR	Intermediate	1st	2018	4	3	1	
 KWT	Initial	not coded	not coded	0	0	1	
 OMN	Emerging	1st	2021	0	1	1	
 EGY	Intermediate	2nd	2020	5	4	4	
 MAR	Emerging	1st	2009	5	2	3	
 TUN	Intermediate	2nd	2004	6	3	3	
 DZA	Initial	not coded	not coded	0	0	0	
 LBY	Nascent	not coded	not coded	0	0	0	
 MRT	Initial	1st	not coded	0	0	0	
 JOR	Initial	not coded	Draft	0	0	0	
 LBN	Nascent	not coded	not coded	0	0	0	
 PSE	Nascent	not coded	not coded	0	0	0	
 SYR	Nascent	not coded	not coded	0	0	0	
 IRQ	Emerging	1st	not coded	6	3	1	
 YEM	Nascent	not coded	not coded	0	0	0	
 SDN	Nascent	not coded	not coded	0	0	0	

Table B.2.

Readiness, digital government, human capital and cybersecurity

State	Oxford 2020	Oxford 2025	EGDI 2018	EGDI 2024	HCI 2024	ITU GCI	NCSI
 UAE	72.40	69.86	0.8295	0.9533	0.9436	98.06	40.26
 SAU	56.23	71.57	0.7119	0.9602	0.9067	99.54	84.42
 QAT	56.78	58.61	0.7132	0.8244	0.7114	94.50	58.44
 BHR	54.75	59.57	0.8116	0.9196	0.8680	77.86	25.97
 KWT	50.61	43.79	0.7388	0.7812	0.7083	75.07	n/a
 OMN	50.78	56.73	0.6846	0.8576	0.7977	96.04	45.45
 EGY	49.19	59.10	0.4880	0.6699	0.6150	95.48	57.14
 MAR	36.42	43.06	0.5214	0.6841	0.6078	82.41	70.13
 TUN	44.39	42.23	0.6254	0.6935	0.6497	86.23	53.25
 DZA	33.47	42.05	0.4227	0.5956	0.6418	33.95	33.77
 LBY	n/a	28.38	0.3833	0.5466	0.5952	28.78	10.39
 MRT	29.42	27.58	n/a	n/a	n/a	18.94	11.69
 JOR	41.76	56.07	0.5575	0.6849	0.6458	70.96	28.57
 LBN	35.91	34.26	0.5530	0.5449	0.5433	30.44	n/a
 PSE	n/a	35.54	n/a	n/a	n/a	25.18	n/a
 SYR	19.33	21.72	0.3459	0.3888	0.4169	22.14	15.58
 IRQ	33.88	29.37	0.3376	0.4572	0.4967	20.71	5.19
 YEM	19.07	14.48	0.2154	0.2318	0.2670	n/a	7.79
 SDN	26.35	16.21	n/a	n/a	n/a	35.03	11.69

Note. n/a = not reported.

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