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Desert mirages to digital realities

**How AI will revolutionize the
Kingdom's government**

INTRODUCTION

Over the past decade, artificial intelligence (AI) has evolved to become a transformational force. Our research estimates AI will contribute as much as US\$15.7 trillion to the global economy by 2030, more than the combined current GDP of China and India. Of that total, the Middle East is set to contribute \$320 billion—with Saudi Arabia alone accounting for \$135 billion (see *Exhibit 1*).¹

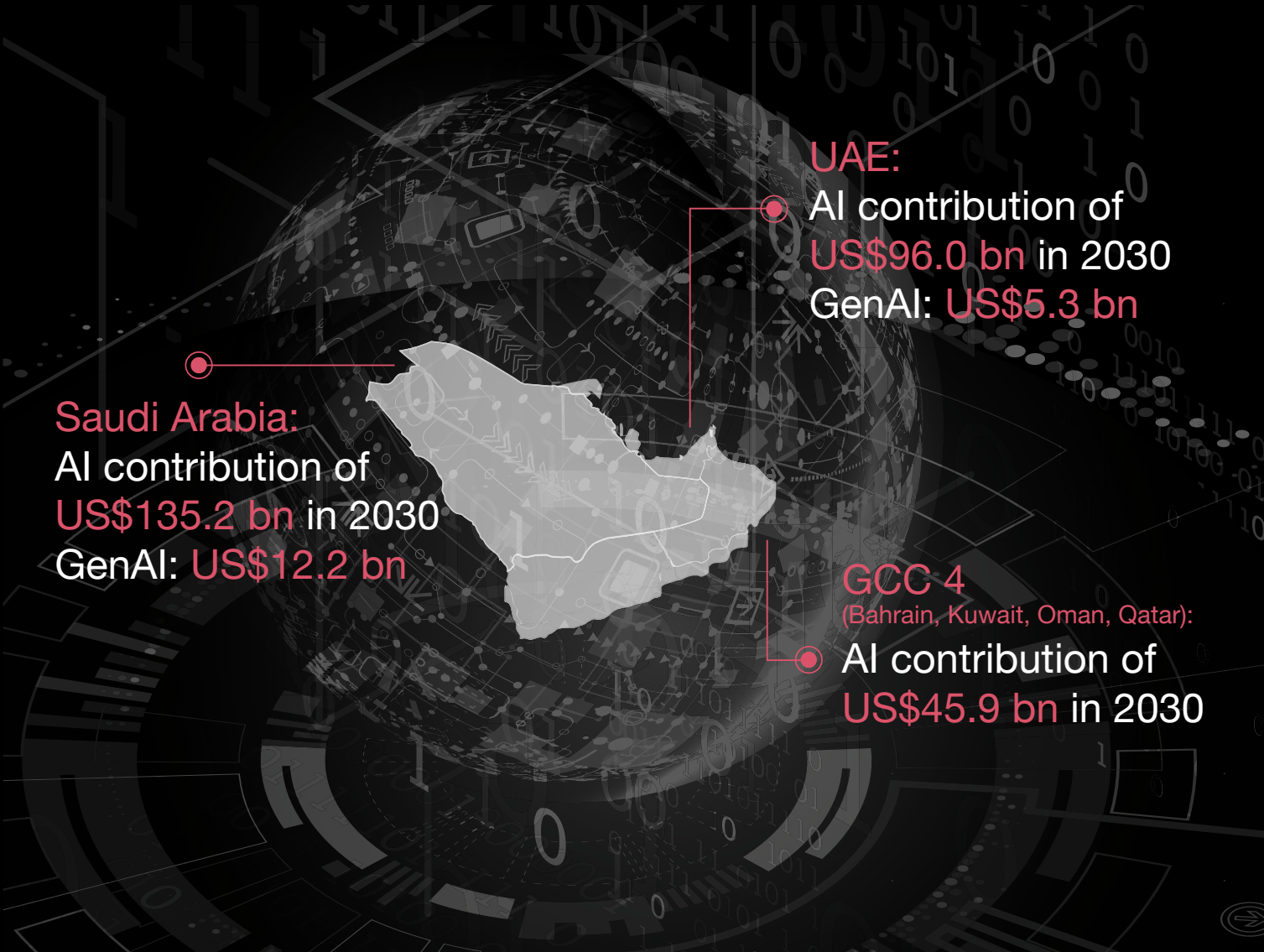
The AI landscape witnessed a notable shift with the introduction of ChatGPT by OpenAI in November 2022. Giants in the tech arena, such as Google’s BARD, Meta’s Llama AI, and Nvidia’s Picasso, have pushed AI into the mainstream. Now businesses of all sizes as well as individuals can harness the power of generative AI. Given the current momentum, we foresee a substantial increase in AI adoption in the next year.

The opportunities are significant for the government of the Kingdom of Saudi Arabia. The use of AI will help public-sector leaders address critical challenges such as food security, streamline public services, tailor educational programs to the evolving needs of their population, optimize urban planning for sustainable growth, and foster innovation in renewable energy sectors, including water resource management.

The integration of AI into governance doesn’t concern only technological advancement, however; it’s a means of designing and implementing smarter, more efficient decision-making processes. Effective policymaking often involves foreseeing future challenges and opportunities, and AI, with its vast data processing and predictive capabilities, can provide policymakers with insights that were previously out of reach. Saudi Arabia’s Vision 2030 recognizes this potential by placing advanced technologies such as AI at the heart of the nation’s development.

AI's emergence on the global landscape can be likened to the dawning of a new industrial age: It is poised to profoundly shift the way nations and governments operate and strategize. Breakthroughs offer a brief window of opportunity. Nations that are proactive and that can swiftly embrace and adapt to this new technological landscape stand to become more efficient, spur innovation, and elevate their global standing. Those that hesitate or are complacent risk falling behind in a rapidly advancing world.

EXHIBIT 1
Contribution of AI and generative AI in the Gulf Cooperation Council (GCC) region by 2030



Source: PwC, "The potential Impact of AI in the Middle East"

WHAT IS AI?

AI is powered by algorithms that go beyond processing data to replicate facets of human intelligence, discern intricate patterns, and aid in critical decisions.

By harnessing AI, organizations can not only achieve operational efficiencies but also ignite innovation across all sectors, including government.

The evolution of AI has now ushered in generative AI, which can create entirely new content. Whether it's penning text, generating images and videos, or composing music, generative AI is redefining content creation. Generative AI might be the latest development, but AI offers myriad solutions that continue to shape and redefine our world.



AI IS ONE OF THE MOST
IMPORTANT THINGS
HUMANITY IS WORKING ON.
IT IS MORE PROFOUND THAN
ELECTRICITY OR FIRE.

SUNDAR PICHAI
CEO OF GOOGLE AND ALPHABET

EXHIBIT 2
Evolution of AI

Artificial Intelligence

Ability to perform cognitive functions replicating human minds
e.g.: autonomous vehicles, security and surveillance

Machine Learning

Ability to learn from existing data to make informed decisions and predictions
e.g.: predicting traffic congestion, supply and demand modeling of the health workforce

Deep Learning

Empowered machine learning with neural networks that mimic the learning process of the human brain

Artificial Neural Network (ANN)

Speech, handwritten character recognition, signature classification, cancer cells detection, analysis of MRI scans

Variational Encoders (VAE)

Data generation, image and audio compression, noise reduction

Generative Adversarial Network (GAN)

Chatbots and virtual assistants, personalization, content generation, document processing automation

Deep Reinforcement Learning (DRL)

Health treatment recommendation, adaptive traffic signal control, trading portfolio optimization, risk management

Recurrent Neural Network (RNN)

Music generation, automated translation, sequence study of the genome and DNA

Source: PwC, "The potential Impact of AI in the Middle East"

In this article, we explore the potential of AI to reshape the Kingdom's ministries and agencies, building richer experiences for citizens while streamlining operations. The center of government emerges as a keystone, with the potential to harness sophisticated data platforms, embrace data-driven policymaking, and make more accurate forecasts. The AI journey also requires the vision to ensure the center of government supports the Kingdom's AI sector in realizing its full potential.

ESSENTIAL AI OPPORTUNITIES FOR THE KINGDOM'S GOVERNMENT

The incorporation of AI into government operations could have sweeping benefits. Three opportunities stand out (see *Exhibit 3*).

EXHIBIT 3

AI opportunities for KSA government

Next-Generation Public Services

AI holds the potential to revolutionize KSA's public services, transitioning them from reactive to proactive, personalizing citizen experiences, and enabling data-driven communication. This will nurture trust in public institutions and ensure governance that reflects the priorities of citizens.

Dramatic Productivity Gains

Enhancing productivity in the Kingdom's public sector is vital, as AI offers the potential for substantial productivity increases—estimated to be 300,000 roles by 2040⁵. These newly skilled individuals will be the driving force in AI adoption across the nation.

High-Impact Public Policy

An AI-powered government nerve center (GNC) is vital for data-informed policymaking, fostering cross-agency collaboration, and enabling a responsive government. It serves as a catalyst for economic growth and innovation.

Source: Strategy& analysis

Next-Generation Public Services

AI could be the foundation for agencies to offer next-generation public services that redefine government–citizen interactions. Ministries and agencies can use AI to shift from a reactive to a proactive stance through data-driven insights. Instead of entangling citizens in bureaucracy, organizations using AI-powered platforms could anticipate needs, offer preemptive solutions and guidance, and foster trust in public institutions.

Saudi Arabia faces a significant challenge: The nation currently ranks 31st in the E-Government Development Index,² a comprehensive benchmark used to evaluate countries, and 43rd in the E-Participation Index, a measure of a government's engagement with its citizens in developing public services. These results serve as a reminder of the pressing need for substantial improvements and innovative solutions—centered on AI—in the Kingdom's public services.

Greater personalization

Governments now have the capability to tailor their services to individual needs, enabling customized interventions that eliminate a one-size-fits-all approach. Such personalization ensures that citizens obtain the right level of assistance. The adoption of a “digital-first” mindset is paramount in improving service speeds and quality. For example, AI-driven chatbots and other digital tools can provide immediate responses and slash current wait times.

These advancements are pioneering a new era in public service characterized by unparalleled agility, speed, and service quality. Estonia is at the forefront of incorporating AI into public services. Drawing on its capabilities, the nation proactively delivers family benefits to those with newborns by scanning daily birth records and evaluating household incomes. The country also rolled out “Bürokratt,” an AI-powered virtual assistant that seamlessly connects citizens to the government. Operating across communication channels, Bürokratt acts as a conduit to more than 50 government services.³

Targeted communication

With the integration of AI and digital tools, governments can enable more targeted citizen awareness campaigns. They can use advanced data analytics to pinpoint specific demographics or regions and tailor communication accordingly. This precision supports the creation of messages for the intended audience, leading to greater awareness. In essence, government could transition from blanket public service announcements to bespoke, data-driven communication strategies.

Dramatic Productivity Gains

AI can empower governments to work smarter, faster, and more effectively. Its potential is particularly relevant for the Kingdom's government.

Over the past two decades, productivity within the public sector in KSA has declined steadily, contrasting with the private sector's upward trajectory.⁴ Saudi nationals account for 42 percent of the national public sector workforce⁵—a proportion that is significantly higher than that of countries such as the U.S., U.K., and France, where the figure ranges from 15 percent to 20 percent. AI's productivity gains in the KSA government are projected to be the equivalent of up to 300,000⁶ positions by 2040. These displaced workers can be upskilled in fields such as data science, data engineering, and the broader AI-related disciplines—and will be instrumental in ensuring AI adoption throughout the Kingdom in years ahead.

Given the intricacy of government operations, AI could be a catalyst for innovation and internal productivity, from automating mundane administrative duties to gleaning insights from vast data troves. As governments pivot toward these AI-enabled enhancements, the fundamental shifts in their operating structures will have profound implications for the nature and size of their workforce.

AI-enabled workplace solutions

AI is in the process of reshaping the digital tools and platforms that power daily tasks. Tools that expedite document approvals (such as DocuSign) or facilitate task management (such as Trello) have become indispensable. Meanwhile, innovations like MeetGeek offer automatic transcriptions and meeting highlights, and platforms such as Snyk help developers increase coding efficiency. The art of drafting impactful communications, too, has been affected by AI, with tools including ChatGPT streamlining content creation.

Smarter resource allocation

AI has emerged as a game changer in government resource management. Its predictive analytics offer greater visibility into current needs as well as the ability to forecast demand. By anticipating where and when critical on-the-ground services such as policing and firefighting will be most needed, governments can evaluate whether their current capacity aligns with future demand. Coupled with real-time monitoring of data, video feeds, and geotagged internet of things (IOT) sensors, AI solutions ensure resources are deployed when and where they are needed most, eliminating waste.

The result is more proactive, cost-effective, and efficient critical government services.

In New York State, for instance, geotagged IOT sensors and advanced computer vision continuously monitor live camera feeds, swiftly identifying fires or suspicious activity and dispatching emergency response personnel.

More effective support services

AI is dramatically reshaping government support services by enhancing their efficiency and precision. In finance, these tools aid with tasks such as forecasting spending and pinpointing spending anomalies. Reporting is more insightful, as AI generates data-driven visualizations that can facilitate decision-making.

THE IMPACT OF AI ON PRODUCTIVITY

On average, generative AI tools increased the throughput of business users by 66 percent when performing realistic tasks. By comparison, average labor productivity growth in the U.S. was 1.4 percent per year between 2007 and 2019.⁷

AI-equipped support agents can handle 13.8 percent more customer inquiries per hour, and programmers were able to code 126 percent more projects per week.

Talent sourcing

Recruitment processes are also being revamped. AI solutions are now able to screen candidates, conduct preliminary interviews, and even recommend the best applicants for organizational roles. Such strides in AI's capabilities demand a reevaluation of traditional hiring methods and expertise within ministries. As AI's influence grows, governments may have to recalibrate talent sourcing priorities to include a strong team of data strategists, data scientists, and data engineers.

By integrating AI solutions, the Kingdom's government agencies can elevate their operational efficiency, cut down on bureaucratic layers, fortify data-driven decision-making, and shift their efforts toward activities with higher strategic value.

High-Impact Public Policy

The promise of AI doesn't end with government regulators and operators. It offers government leaders the opportunity to take an evidence-based, holistic, and collaborative approach to addressing complex national policy priorities such as economic diversification and tourism.

In this regard, the Kingdom finds itself trailing Organisation for Economic Co-operation and Development (OECD) and GCC nations. It is currently ranked 58th in the Regulatory Quality Index,⁸ which gauges a government's capacity to develop and execute robust policies and regulations that permit and promote development within the private sector.

The power of a government nerve center

Establishing a government nerve center (GNC) in the Kingdom could inform policymaking by providing government decision-makers with real-time, large-scale data from diverse sources, including the public and private sectors and IOT devices. Equipped with advanced AI and machine learning, the GNC would analyze data to reveal trends and insights that could guide policy. Its interactive interfaces would enable officials to visually engage with real-time data, leading to more informed, timely decisions.

When a GNC is established at the center of government, it enables the orchestration of collaborative efforts across various agencies and sectors, supporting the development and implementation of high-impact public policies without having to travel back through the chain of command. In addition, the GNC can use AI for trend analysis and predictions to help identify local trends that might not be apparent to independent government entities. The GNC essentially becomes a national observatory, capable of assessing, forecasting, and eventually influencing economic growth, trade, and energy consumption, among other matters.

For example, developing data-driven national policies for the tourism sector would require an understanding of other sectors, including hospitality, entertainment, and leisure, along with the aviation industry's capacity, the supply of skilled talent, and foreign currency inflows. These data sets are often scattered across various entities, making it difficult for policymakers to gather pertinent information. By aggregating data from these disparate sources, the GNC would address this challenge and enhance the effectiveness of policy formulation.

Understanding citizen sentiment

The GNC would also allow the Kingdom's government to deploy media sensing and social media sentiment analysis tools, which are essential for governments if they are to gain real-time insights into citizen sentiments. By tapping into these platforms, governments can access a broad range of voices, allowing for immediate feedback on policies and initiatives. This proactive approach helps government leaders anticipate the needs of citizens and residents, fine-tune policies, and ensure they are being responsive to the genuine priorities and concerns of the public.

Collaborating with the private sector

In the future, the GNC could also be used to establish and maintain an ecosystem for innovation and value creation. By providing real-time open data streams to the private sector, it would enable the creation of innovative products and services and strengthen the startup community. For example, Singapore's HealthHub relies on government data sharing through an open API to enhance healthcare services and improve care quality.

BUILDING A NATIONWIDE AI ECOSYSTEM

For the Kingdom's government to realize the full potential of AI, it must develop and maintain a robust AI ecosystem. Due to the highly strategic nature of this ecosystem, the center of government is ideally positioned to assume the role of orchestrator, in collaboration with more specialized government agencies as well as private-sector tech champions. Without this leadership, these initiatives could face significant delay or fail altogether.

To help policymakers determine how the center of government can reap the opportunities presented by AI, we formulated a national AI investment framework that focuses on three key dimensions: opportunity space, investment depth, and market engagement approach (see *Exhibit 4*).

The center of government has the potential to catalyze the rapid growth of KSA's AI ecosystem across all opportunity spaces by strategically orchestrating investments on multiple fronts—including through the Kingdom's sovereign wealth fund (SWF) and collaborations with local industry leaders.

Incentives for AI investment

To build and scale national AI champions, the center of government, in collaboration with regulators, can deploy incentives to boost investments in core areas. These incentives could include tax breaks for AI-related businesses, R&D investments, grants or low-interest loans for AI research projects, and government-backed venture capital funds to invest in local and regional AI startups with support from the Kingdom's SWF. AI startups should focus on products and services within industries or domains where KSA holds a competitive edge or where localized products are key to market success (for example, energy, healthcare, education, Arabic language and culture-focused models, and other spaces with untapped potential).

EXHIBIT 4

National KSA AI investment framework

Opportunity Space

Potential investment opportunity areas for AI growth and innovation

Computation

Invest in the areas providing computational edge, such as chip design, manufacturing, and cloud-based data centers

Intellectual property (IP)

Invest in building AI base models and industry-specific AI-powered products and services

Data

Invest in data assets and cutting-edge tools to efficiently generate, aggregate, and manage the entire life cycle of data

Know-how

Invest in AI accelerators, think tanks, AI advisory businesses, and AI delivery capabilities

Market Engagement Approach

The mechanism to engage with the AI market

Build

Build, launch, and scale greenfield businesses using venture capital (VC) funding, startup accelerators, or venture builders

Acquire

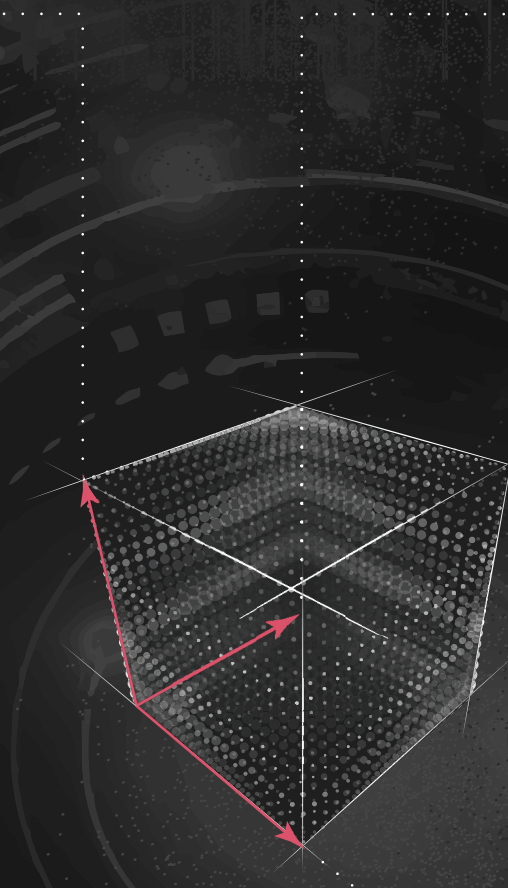
Acquire existing players in the regional and global markets to act as the foundation of future investments in the space

Partner/Invest

Invest in or partner with large global incumbents in the AI space to bring the best of global AI to the Kingdom

Enable community

Invest in a system of incentives, capabilities, and resources for KSA startups to compete and win in the AI space



Investment Depth

The degree of investment in technical depth within opportunity areas

Deep tech

Direct investment toward cutting-edge endeavors that require substantial R&D efforts

Platform build

Build a platform that serves as a foundation for others to build, scale, and sell AI products and services

Product build

Build direct-to-consumer AI-powered industry-specific products and services

Showcase

Build and launch flagship showcase products primarily used as proof-of-concepts or brand-building activities

Source: Strategy& analysis

The center of government can also spearhead the creation of sandbox environments through sectoral regulators where startups can test—independently or in collaboration with global R&D partners—new AI technologies, products, or services without existing regulatory constraints.

Cloud opportunities

Hyperscale cloud providers continue to expand their footprint in the region, particularly in Saudi Arabia. Microsoft intends to inaugurate a data center in KSA, and Google recently announced the launch of Google Cloud Platform in KSA. Since the majority of cutting-edge AI platforms and services today are cloud-based, forging strategic partnerships with hyperscalers is imperative if the Kingdom is to ensure that its AI ecosystem has sufficient access to best-in-class technology at scale and with affordable prices. KSA can still develop national champions in the computation space, particularly for data center solutions in sensitive sectors such as defense.

Potential partnerships with chipmakers

The chip design and manufacturing market—which is dominated by a few players (Nvidia, TSMC, and Samsung)—is highly competitive. Industry leaders have extensive R&D capabilities and benefit from economies of scale, creating significant barriers to entry for newcomers. The SWF could explore investment opportunities with these established leaders, as such partnerships would not only bolster its financial assets but also ensure it could influence the direction of the AI computing sector.

Collectively, this centralized initiative to nurture an AI ecosystem can promote economic diversification, attract foreign investment, generate a vast array of new job opportunities, and spur innovation. This approach will firmly establish the Kingdom as a front-runner in the ever-evolving global AI landscape.

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THOSE WHO CAN SUCCESSFULLY
HARNESS THE POWER OF AI WILL
LEAD THE GLOBAL ECONOMY IN
THE DECADES TO COME.”

JENSEN HUANG
CO-FOUNDER AND CEO OF NVIDIA

UNDERLYING RISKS, MITIGATIONS, AND SUCCESS FACTORS

Although AI holds significant potential for the Kingdom's government, it also brings risks (see *Exhibit 5*). To ensure the secure adoption of AI technologies in the Kingdom, a comprehensive risk assessment and mitigation strategy is essential.

1

**Privacy, ethics,
and regulations**

2

**Tech readiness
and scalability**

3

**Talent and skills
development**

EXHIBIT 5**AI risks and success factors**

Privacy, ethics, and regulations

- Data privacy
- Global and local regulatory compliance
- Ethics, bias and transparency
- Cybersecurity and fraud

Tech readiness and scalability

- Data management
- Data governance
- Infrastructure scalability
- Strategic tech partnerships

Talent and skills development

- AI education investment
- Global R&D collaborations
- Relocation incentives
- AI knowledge hub

Source: Strategy& analysis

Privacy, ethics, and regulations

Given the central role of data in AI adoption, policymakers must address privacy concerns, ethical considerations, and compliance with data regulations.

As governments increasingly use AI to improve services, data privacy becomes a higher priority. The handling of sensitive citizen data, such as personally identifiable information (PII) or confidential medical records, risks significant breaches that could erode public trust. Strict compliance with local regulations such as KSA's Personal Data Protection Law (PDPL) is essential.

If KSA intends to build national AI champions that will eventually scale to become global exporters of AI products and services, compliance with leading global privacy regulations such as the European Union's GDPR will also be critical.

Beyond regulatory obligations, data privacy measures include data masking and tokenization, end-to-end encryption, geofencing data storage, and blockchain-based identity verification. These measures not only build trust in AI-driven government services but also uphold the privacy rights of citizens.

Government AI models are often trained on historical data and can replicate hidden biases and ethical dilemmas in unintended ways, amplifying societal prejudices. Heavy reliance on automation can lead to issues as well, since machines cannot fully replicate nuanced human judgment. To address these concerns and establish ethical guardrails, the use of fairness-aware machine-learning algorithms and transparent decision-making procedures for AI systems should be planned.

The democratization of AI will likely increase cybercrime and fraud. To counteract the growing threat from both state and criminal actors, governments should consider making substantial investments in AI-powered cybersecurity and fraud detection tools and models.

Tech readiness and scalability

For the government to effectively adopt AI at scale, it needs substantial pipelines of high-quality data, ready access to advanced technology infrastructure, and scalable computing power. Governments will have to implement robust data management and governance practices.

The National Data Management Office (NDMO)—acting as the national data regulator, under the supervision of the Saudi Data and Artificial Intelligence Authority (SDAIA)—has already made progress in this regard. However, additional measures will be necessary to fully unlock the potential of data-driven initiatives.

For example, the Kingdom is benefiting from its deepening partnerships with major cloud providers. Microsoft Azure's coming data centers will offer local data residency and increase cloud access. Zain KSA has joined forces with Amazon Web Services to develop cloud-native infrastructure that will enhance 5G network performance. In addition, Google's joint venture with Saudi Aramco will advance KSA's digital infrastructure and technological capabilities.

These partnerships will continue to empower both the government and local businesses to harness advanced cloud-based technologies for enhanced efficiency, data management, and scalability.

Talent and skills development

To cultivate AI skills for a knowledge-based economy, the government should introduce STEM and related disciplines into early education, invest in national universities, and collaborate with prestigious international institutions to establish branches within the Kingdom. For example, King Abdullah University of Science and Technology (KAUST)⁹ and esteemed Chinese academic institutions have recently partnered to pursue industrial advancements. Their efforts are enabling the transfer of technology, accelerating research progress, and complementing existing training initiatives. The government should also explore partnerships with global tech companies to deliver accredited training initiatives, thereby enhancing the proficiency of the domestic AI workforce.

The government can help attract top talent through incentives, including relocation packages and expedited, independent, and longer-term residency permits. In addition, enhanced end-of-service benefits can provide financial stability, and equity grants linked to company ownership could enable employees to participate in the organization's success and growth, solidifying their commitment to staying in the region.

The Kingdom's strategic approach should seek to position the country as a knowledge hub. Investments in prime R&D institutions and the creation of startup campuses such as the Garage—the Middle East's largest startup district—could entice tech and innovation giants to establish their own regional operations there.

CONCLUSION

The AI-driven transformation of government represents a foundational pillar to support KSA's future and could be integral to achieving Vision 2030's ambitious economic diversification objectives. By making comprehensive investments in AI technologies and nurturing an innovation-driven culture, the Kingdom has the potential to unlock unprecedented growth and development. These advancements will not merely maintain KSA's standing, but help it leapfrog and outpace potential regional and global competitors. Therefore, KSA must wholeheartedly embrace AI and make strategic, coordinated investments in its adoption and advancement.

ENDNOTES

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