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The Global South AI Diffusion Playbook

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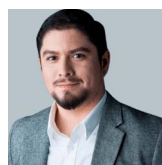
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From Readiness to Diffusion: Why AI Impact Depends on Scale

1.1 Diffusion is the Next Frontier of AI Impact

Artificial intelligence (AI) has quickly moved from the realm of specialised research into the fabric of everyday economic and social life. After more than a decade of intense innovation in core AI capabilities (large language models, generative tools, and now AI agents), the policy and business conversations have shifted from what AI can do to who is actually using it, how it is used, and with what long-term effects.

In 2025, global generative AI adoption reached record levels, with roughly one in six people worldwide using these tools; yet the pace of adoption has varied dramatically across regions, sectors, and demographic groups.¹

Economies in the Global North are adopting AI at nearly twice the rate of those in the Global South, revealing a clear diffusion gap that extends well beyond innovation itself.² Policymakers, economists, and international organisations increasingly agree that the diffusion of AI – i.e., its translation from capability into widespread use – is now one of the most important determinants of future productivity, equity, and state capacity.

To understand why diffusion matters so much, it is useful to distinguish AI readiness from AI diffusion. Readiness refers to a country's or organisation's underlying ability to engage with AI spanning infrastructure, skills, data governance, and regulatory frameworks. Many high-income economies score high on readiness, with the digital infrastructure and human capital essential for AI experimentation.

But readiness alone does not guarantee that these technologies are effectively integrated into mainstream workflows, public services, or everyday decision-making. Diffusion is fundamentally about routinisation: the degree to which AI tools are embedded across sectors, amplifying productivity, improving service delivery, and reshaping institutional processes.³



Emerging research suggests that the economic returns and societal impacts of AI will accrue most where adoption becomes broad, sustained, and meaningful; rather than confined to isolated pilots or early adopters.⁴ This reflects a growing recognition that the distribution of AI benefits will depend less on frontier breakthroughs and more on how widely and equitably those technologies are deployed.

This reframes the scope and scale of what is understood as AI leadership. It is no longer enough to lead in research or host advanced compute infrastructure; leadership will belong to countries and institutions that can convert readiness into widespread, beneficial use, while managing the social, ethical, and economic implications of deployment.⁵

1.2 Diffusion Gaps in the Global South

Although AI has gained widespread attention, a pronounced diffusion gap persists between the Global North and the Global South.

Recent research suggests that adoption in the Global North grew at nearly twice the pace of the Global South, with 24.7% of the working-age population in the Global North using AI tools versus just 14.1% in the Global South.⁶ This disparity is rooted in a constellation of systemic and infrastructural constraints that inhibit the translation of capability into diffusion.

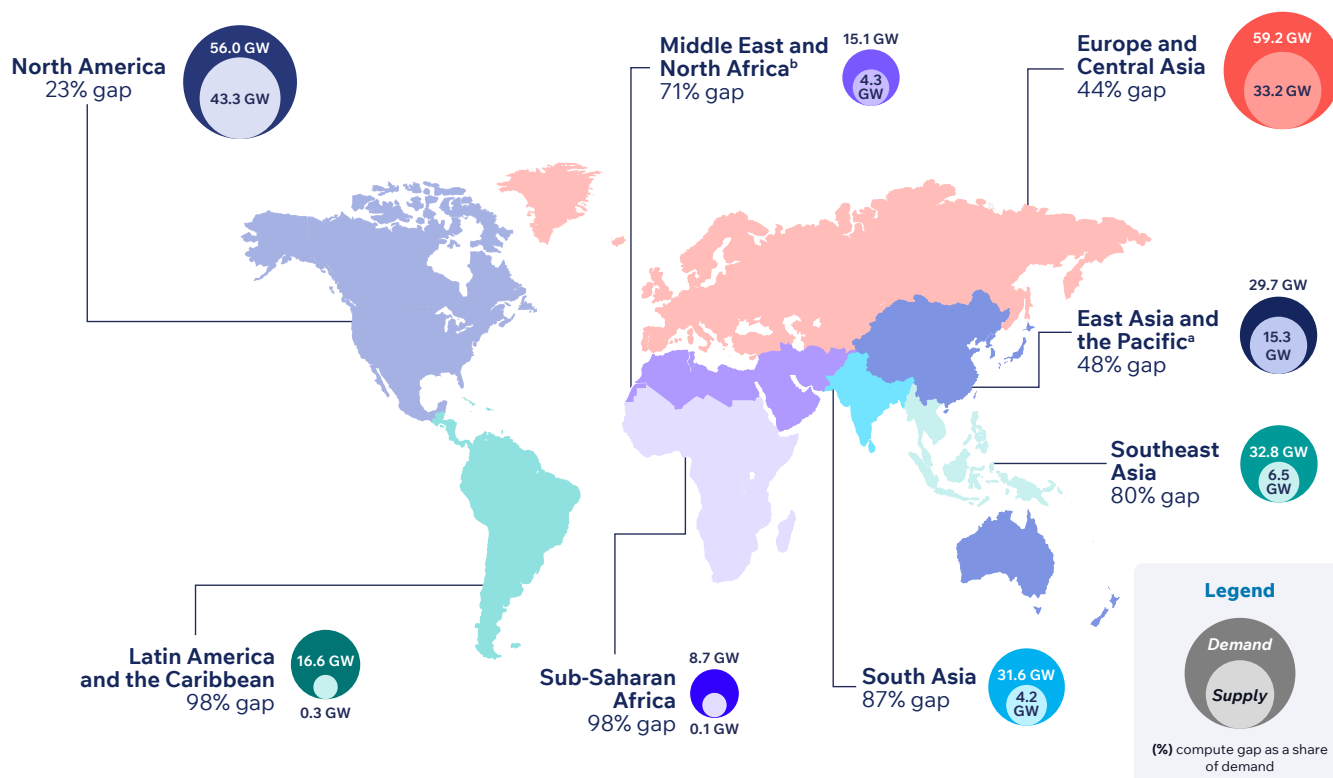
A central barrier is infrastructure. Economies in the Global South face comparatively limited access to the compute pathways that underpin modern AI,

such as cloud services, data centres, high-capacity networks, and associated architectures.⁷ The UN Secretary-General's High-Level Advisory Body on Artificial Intelligence notes a stark concentration of critical hardware in the Global North: none of the world's 100 high-performance clusters capable of training large language models are hosted in developing countries, and just two nations account for half of global hyperscale data centres.⁸ Further, as illustrated in *Figure 1*, projected demand for AI inferencing capacity by 2030 significantly outstrips available data centre supply across much of the Global South, highlighting a widening compute gap that risks constraining large-scale AI deployment. The absence of locally available compute and hosting capacity thus constrains where and how AI can be experimented with and scaled.

Figure 1

Volume of compute resources needed to meet demand for AI inferencing (in gigawatts)⁹

Equivalent demand and projected DC capacity for AI inferencing in 2030 by region, gigawatts (GW)



Source: Access Partnership analysis

Note: The size of the bubbles represent the relative magnitude of demand and projected DC capacity for the region.

^a Excludes Southeast Asia.

^b Includes Afghanistan and Pakistan.

Connectivity shortfalls further compound diffusion challenges. A significant share of the global population, disproportionately located in the Global South, remains offline.¹⁰ Limited mobile, terrestrial, and satellite network reach not only restricts direct use of AI applications but also deepens adoption gaps.

Energy and other foundational utilities are additional bottlenecks. High-volume computation and data centre operations require consistent electricity and water resources, but limited supply in the Global South increases the cost and complexity of hosting and operating AI infrastructures locally. A case in point: although the Global South accounts for two-thirds of the world's population, the region produces only around 18% of global power generation capacity.¹¹

Besides infrastructural constraints, systematic limitations, especially institutional and regulatory fragmentation, are also salient. Policy frameworks across the Global South vary widely in their approaches to AI governance, data protection, copyright, and standards development.¹² Debates over digital sovereignty further entangle decisions about where data may be stored and processed, fragmenting markets and complicating the use of AI functionalities.¹³ This divergence can discourage investment and slow the diffusion of AI.

Procurement systems present another practical impediment. Weaknesses in public procurement, ranging from opaque processes to limited regulatory capacity and operational inefficiencies, reduce governments' ability to procure, integrate, and sustain AI solutions that could improve service delivery and decision-making.

Finally, the lack of talent further limits diffusion. Much frontier AI development remains concentrated in the Global North, contributing to brain drain and acute talent shortages in many countries in the Global South. For example, a recent report notes that 79% of the employers in the Asia-Pacific region have difficulty filling AI roles, and 75% express concern about how to implement workforce AI training programs to upskill the current workforce.¹⁴ Without sustainable training pipelines and reskilling strategies, talent shortages will continue to constrain diffusion and ultimately, the equitable distribution of AI's economic benefits.

1.3 Strategy Alone is Not Enough

Many governments in the Global South have articulated ambitious national AI strategies and invested in foundational capabilities.¹⁵ Yet progress in diffusion remains uneven, reflecting a growing and persistent gap between strategic intent and practical use. While policies often focus on building readiness, they do not always address the conditions required for AI to become routine across enterprises, consumers, and public services.^{16,17}

The central challenge is not the absence of policy activity, but the lack of alignment across systems. AI diffusion, therefore, requires a shift in focus from isolated interventions to coordinated system re-design. Diffusion accelerates when infrastructure choices reflect real operating conditions, data rules are clear in practice, institutions can reuse solutions, organisations are prepared for workflow change, and markets reward scalable deployment rather than bespoke experimentation.

This gap has significant economic and social consequences. Economists have argued that the commercial returns to AI investment hinge on its diffusion throughout the economy, enabling existing firms and institutions to lower costs, innovate products, and improve outcomes. Where diffusion is slow or patchy, these potential gains remain unrealised, and existing inequalities risk being reinforced rather than reduced.¹⁸

This insight points to the need for a framework that makes these system interdependencies explicit. Rather than treating AI as a single technology or policy domain, governments need a way to understand how multiple system dimensions interact to either enable or constrain diffusion. The Global South AI Diffusion Framework responds to this need by identifying the core dimensions that must move together, and the role governments play in aligning them so AI use can scale across the economy.



A Framework for Enabling AI Diffusion in the Global South

The Global South AI Diffusion Framework helps governments move beyond questions of readiness and adoption to focus on what allows AI use to embed and scale across the economy. It is grounded in the premise that AI diffusion is not primarily a technical challenge but a systems challenge.

Diffusion outcomes are shaped by how five system dimensions interact: AI stack and infrastructure, data governance and trust, institutions and procurement, skills and organisational readiness, and markets and demand. Diffusion breaks down when these dimensions evolve in isolation or at different speeds and accelerates when they are deliberately aligned around real-world use.

Critically, diffusion occurs across three interconnected spheres of adoption: enterprises, consumers, and the public sector. Enterprise adoption drives productivity and competitiveness; consumer adoption embeds AI into everyday services and interactions; and government adoption shapes both through procurement, regulation, and service delivery. AI use spreads at scale only when all three spheres advance together.

Within this system, governments play a distinct role not only as adopters or regulators, but as market shapers. Through infrastructure decisions, data

rules, procurement practices, skills investments, and demand signals, governments can influence which AI solutions are developed, which deployment models scale, and who can adopt them.

This framework, therefore, provides a structured way to identify where system misalignments constrain diffusion and to guide public action that realigns incentives, so AI use becomes widespread, repeatable, and durable across the economy.

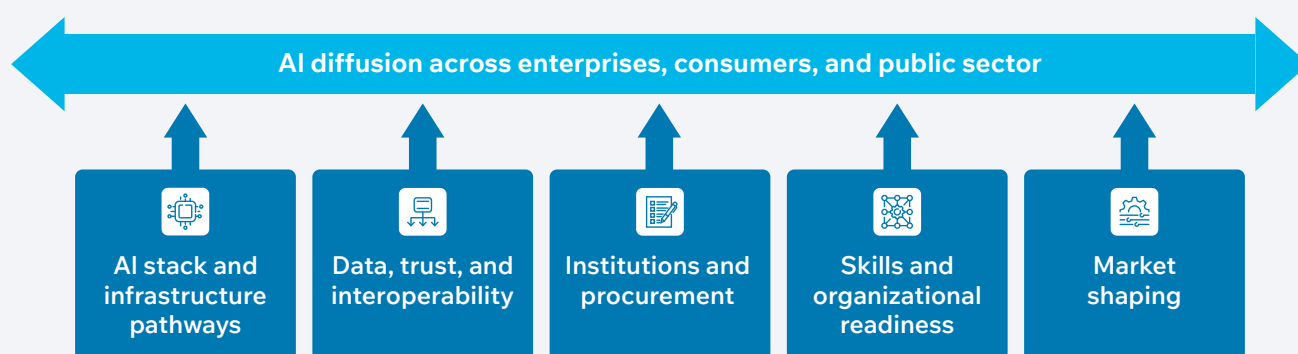
2.1 AI Stack and Infrastructure Pathways

AI diffusion does not depend on a single technical model or a single type of infrastructure. In practice, AI can be deployed in different ways, and many high-impact use cases do not require large data centres or advanced national computing facilities to deliver value. Some AI applications rely on centralised systems, such as cloud services and large data centres.

These are well-suited for complex analytics, national platforms, and model development, but they typically require reliable power, strong connectivity, and mature governance arrangements. Other applications can run closer to where they are used, such as on devices, machines, or local systems, using smaller, task-specific

Figure 2

The global South AI diffusion framework



models. These edge or on-device approaches are often more affordable, resilient, and easier to scale in environments with limited connectivity or tight cost constraints. Another pathway involves shared or regional approaches, such as regional compute hubs or federated infrastructure. These models allow countries to access advanced capabilities without each needing to build and operate the full stack independently.

Diffusion stalls when policy assumes that hyperscale data centres, domestic foundation models, or sovereign chip manufacturing are prerequisites for meaningful AI use. In reality, many priority use cases, particularly in public services, micro, small and medium enterprises (MSMEs), agriculture, and health can already be supported through edge, on-device, or regional pathways.^{19,20,21}

From a diffusion perspective, the key question is not how advanced the infrastructure is, but how easily many users can deploy AI affordably and reliably. Aligning AI infrastructure choices therefore means starting with the use case, rather than the technology. Governments need to consider local connectivity and energy conditions, the sensitivity of data involved, the costs of deployment, and the skills available at the point of use.²² When AI systems are designed around these realities, diffusion becomes faster, more affordable, and more inclusive.

2.2 Data, Trust, and Interoperability

Trust in AI systems is essential for widespread diffusion, beyond mere data access, as it fosters confidence among governments, businesses, and citizens that data handling is safe, responsible, and predictable for routine operations.²³ These hinge on three practical and interconnected issues. First, whether the data needed for AI is available, reliable, and usable across systems. Second, there must be clear safeguards in place, including security, assurance, and accountability, so that AI systems can be trusted in everyday use. Third, whether governments and organisations have practical guidance on how data can be shared and used, including across borders, that aligns with global best practices and domestic policy objectives.²⁴



Different AI deployment pathways place different demands on data governance. AI running on devices or local systems often requires less data movement, thereby reducing privacy and security risks. By contrast, centralised systems depend more heavily on data flows across organisations and jurisdictions, increasing the importance of interoperability and assurance.²⁵ Governance frameworks that do not account for these differences often impose unnecessary friction on low-risk deployments while failing to manage risk effectively in higher-impact contexts.

To support diffusion at scale, data governance must move beyond access and control to portability and interoperability. Enabling data portability through standardised APIs will allow data to move securely between systems and providers, reducing lock-in and lowering barriers for enterprises, especially MSMEs.²⁶ It will also allow AI solutions to be reused and integrated across public services and markets, rather than being rebuilt for each use case. Where data governance frameworks are fragmented, unclear, or disconnected from how AI is actually deployed, organisations become uncertain about what is permitted in practice and delay adoption even when the technology itself is ready.²⁷

2.3 Institutions and Procurement for Diffusion

Institutions can play a significant role in shaping AI adoption by enabling routine use beyond pilots, as they determine how public systems authorise, fund, and procure technology. In this context, institutions refer to not just procurement rules but to the wider machinery that enables AI adoption in the public sector, including budgeting, accountability structures, and oversight capacity.

However, many public-sector procurement and accountability frameworks were designed for static technologies with fixed specifications, predictable lifecycles, and limited need for ongoing adaptation. AI systems, by contrast, evolve through use, require continuous monitoring, and often improve incrementally over time. When institutional rules assume one-off purchases, fixed risk transfer, or rigid vendor relationships, they unintentionally discourage the adoption of AI systems that could otherwise scale across services. This can favour familiar suppliers and bespoke solutions, even where more cost-effective or locally appropriate options exist.

From a diffusion perspective, the key issue is not whether institutions can procure AI once, but whether they can support repeatable and responsible AI adoption at scale.²⁸ Diffusion will depend on institutional capacity to reuse AI solutions across agencies, expand AI deployment without restarting approvals from scratch, and maintain clear

accountability for performance and risk across the AI system lifecycle. Once these capabilities are set up, AI will become a reusable public capability rather than a series of disconnected projects.

2.4 Skills and Organisational Readiness

One of the most significant barriers to AI diffusion is organisational rather than technical. AI does not create value in isolation; it delivers impact only when it is integrated into everyday organisational processes. Successful diffusion, therefore, depends on whether AI is embedded into routine work across organisations, rather than confined to specialist teams, pilots, or innovation units.

This requires baseline AI literacy for managers, frontline workers, and public servants, including the ability to interpret AI outputs, understand limitations, and exercise judgement in real-world contexts. When AI remains confined to small expert teams or innovation units, its use does not spread, and potential productivity and service gains remain unrealised. By contrast, when AI is embedded into standard workflows, it creates opportunities to simplify procedures, reduce manual decision points, and eliminate human involvement in repetitive or administrative tasks, lowering both corporate and government bureaucracy. In this context, expanding access to AI skilling for women and other marginalized groups, particularly in public administration and priority sectors, is therefore not only an equity objective but a diffusion imperative.²⁹



Organisational readiness also depends on the ability to redesign workflows, roles, and decision-making processes. AI diffusion often requires changes in how tasks are performed, how decisions are supported, and how accountability is assigned. Rigid organisational structures and job definitions can therefore slow or block integration into daily operations. Skills development must also align with deployment realities: on-device or decentralised AI relies more heavily on domain and operational expertise, while centralised systems place greater demands on governance, oversight, and assurance capacity.³⁰ When training and organisational design are misaligned with how AI is actually deployed, adoption stalls despite technological readiness.

Importantly, inclusive capacity building is critical to sustainable diffusion. Without deliberate efforts to broaden participation, AI skills and organisational influence risk becoming concentrated among a narrow group of technical specialists, reinforcing existing inequalities. Expanding access to AI skilling for women, particularly in public administration and priority sectors, is therefore not only an equity objective but a diffusion imperative. Diverse participation improves system design, strengthens organisational uptake, and helps ensure AI solutions are relevant, trusted, and usable across the workforce.

2.5 Market Shaping

AI can diffuse only when markets reward solutions that are affordable, reusable, trustworthy, and suited to real-world conditions across enterprises, consumers, and public services. In this context, market shaping refers to how governments can influence demand, incentives, and norms to make scalable AI use commercially viable and socially accepted.

Without this, AI adoption may remain concentrated among a small number of large organisations or confined to pilot projects, while MSMEs, consumers, and frontline public services struggle to adopt because of high costs or weak interoperability.

Public sector adoption can play a catalytic role in this process by defining market norms. When public services adopt AI as part of routine

delivery, suppliers will gain confidence to invest in scalable solutions, reducing costs and barriers for enterprises and consumers. Public-sector use also signals which design principles, such as accountability, interoperability, and responsible use, are likely to be rewarded over time, shaping wider market behaviour.

These demand signals will influence which AI solutions can scale in practice. In environments with limited connectivity or tight cost constraints, lightweight and decentralised approaches are more likely to diffuse. In regulated sectors, solutions that enable transparency and auditability gain traction. Markets will therefore be able to scale AI systems that align with real operating conditions, while technically sophisticated but impractical solutions remain confined to pilots.

Box 1:

Reframing AI Sovereignty: A Diffusion-First Perspective

AI sovereignty has become a central concern in many national strategies. Protecting national interests, security, and resilience is legitimate; however, when sovereignty is framed primarily as ownership or localisation of infrastructure, it can unintentionally slow diffusion.

From a diffusion perspective, sovereignty is about capability rather than isolation. In this respect, AI sovereignty should be the ability to choose appropriate AI deployment pathways, govern their use effectively, and ensure that societies benefit from them over time. Not every use case requires domestic data centres, locally trained foundation models, or sovereign chip manufacturing. Shared infrastructure, regional cooperation, and trusted data arrangements can enable scale while preserving national oversight. Sovereign AI capabilities can also be developed collaboratively, combining domestic governance with global technology partnerships. Viewed through this lens, sovereignty becomes a design principle that supports diffusion, rather than a constraint that limits it.

Box 2:

Governing AI diffusion beyond regulation

As AI moves from experimentation to routine use across economies and public institutions, the question is no longer whether AI should be regulated, but how it should be governed to enable responsible, inclusive, and scalable diffusion.

Regulation remains a necessary part of the AI policy toolkit, particularly for high-risk and rights-sensitive applications, but it cannot, on its own, determine how AI is adopted, embedded, and trusted across diverse sectors and contexts.

What ultimately determines whether AI delivers broad-based productivity gains and social value is the quality of governance frameworks that sit beyond, alongside, and in between formal legal rules.

AI governance, in this sense, refers to the broader ecosystem of institutional arrangements, assurance mechanisms, accountability structures, and participatory processes that guide the design, deployment, monitoring, and adaptation of AI systems over time.

Unlike regulation, which tends to be static, ex ante, and compliance-driven, governance is dynamic, iterative, and operational. It focuses not only on preventing harm, but on enabling responsible use in real-world settings, particularly where regulatory capacity, enforcement resources, or technical expertise may be uneven.

Governance as an enabler of responsible AI diffusion

Responsible AI diffusion depends on trust. Organisations, public agencies, and individuals are unlikely to integrate AI into routine decision-making if they lack confidence in how systems work, how risks are managed, or who is accountable when things go wrong.

Governance mechanisms play a central role in addressing this trust gap by translating high-level principles into practical, implementable processes that can be adopted across sectors and levels of capacity.

International policy discussions increasingly recognise this shift. The OECD has emphasised that AI diffusion is shaped as much by organisational readiness and governance practices as by technological capability,³¹ noting that firms and governments require clear internal accountability, risk management, and assurance mechanisms to adopt AI at scale.³²

Likewise, the UNESCO Recommendation on the Ethics of Artificial Intelligence explicitly frames governance as a lifecycle-based responsibility, extending from system design to post-deployment monitoring, with a strong emphasis on institutional oversight and stakeholder inclusion rather than legal compliance alone.³³



In practice, this means that governance structures must help organisations answer a set of operational questions that regulation often leaves open: Who is responsible for AI-enabled decisions? How are risks identified and escalated in real time? How are affected communities informed or consulted? And how is system performance reviewed as contexts, data, or objectives change? Where these questions are unresolved, AI adoption tends to remain cautious, fragmented, or confined to low-impact use cases, limiting both productivity gains and public value.

Assurance and accountability over prescriptive rules

One of the defining features of governance beyond regulation is the shift from prescriptive rules to assurance-based approaches. Rather than specifying in detail how AI systems must be built or used, assurance frameworks focus on demonstrating that systems meet agreed standards of safety, reliability, fairness, and transparency.

This approach is particularly relevant in fast-moving technological environments where rigid rules risk becoming obsolete or inhibiting beneficial innovation.

Assurance mechanisms can take multiple forms, including internal risk assessments, algorithmic impact assessments, independent audits, and post-deployment monitoring processes. Importantly, these mechanisms are not limited to high-risk or frontier systems; they also apply to everyday, low-to-medium risk AI applications that, when deployed at scale, can have significant cumulative effects on workers, consumers, and citizens.

The National Institute of Standards and Technology (NIST)'s AI Risk Management Framework reflects this governance logic by providing organisations with a voluntary, flexible structure to identify, assess, and manage AI risks across the system lifecycle.³⁴

Accountability is central to this approach. Effective governance clarifies roles and responsibilities within organisations, ensuring that AI-related decisions are owned, documented, and reviewable.



This is especially critical in public-sector contexts, where AI is increasingly used to support service delivery, eligibility determinations, and resource allocation. Without clear accountability structures, even well-intentioned deployments can undermine public trust and trigger backlash, slowing adoption and reinforcing scepticism.³⁵

Participatory governance and inclusion by design

Governance beyond regulation also requires a shift towards more participatory and inclusive approaches to AI deployment.

As AI systems shape access to information, opportunities, and public services, affected stakeholders increasingly expect a voice in how these systems are designed and governed. Participatory governance does not imply consensus-based decision-making for every deployment, but it does require meaningful engagement, transparency, and avenues for redress.³⁶

Global experience shows that inclusive governance processes can actively support diffusion rather than hinder it. Research has found that involving workers, users, and civil society early in deployment processes enables organisations to surface context-specific risks, improve system design, and build social licence for AI use.³⁷ This is particularly important in regions where historical experiences with digitalisation have been shaped by concerns over surveillance, exclusion, or unequal benefit-sharing.³⁸

From a diffusion perspective, participatory governance helps ensure that AI systems are usable and relevant across diverse linguistic, cultural, and socio-economic contexts. It also mitigates the risk that AI adoption disproportionately benefits well-resourced actors while marginalising smaller firms, informal workers, or vulnerable communities.³⁹

In this sense, participation is not only a normative requirement but a practical enabler of inclusive adoption.

From global principles to operational governance

A persistent challenge in AI policy has been the gap between global principles and operational reality. While there is broad international alignment around concepts such as transparency, fairness, and accountability, organisations often struggle to implement these principles in concrete, repeatable ways.

Governance beyond regulation seeks to close this gap by focusing on institutional capacity, practical tools, and learning-by-doing.

This approach aligns with emerging regional efforts, including in Asia-Pacific countries, to develop common governance frameworks, peer-learning mechanisms, and capacity-building initiatives that support AI adoption while managing risk.

Rather than relying solely on harmonised regulation, these efforts prioritise shared governance practices, mutual recognition of assurance processes, and collaboration between public and private actors.



Embedding AI Across the Economy

Building on the Global South AI Diffusion Framework, this chapter translates its insights into a practical sequence of government action. The roadmap is designed to guide implementation across enterprises, consumers, and the public sector, recognising that progress in any one domain depends on movement in the others. It identifies concrete levers governments can use to enable early uptake and then embed AI into routine economic and institutional activity.

AI diffusion requires both near-term action and sustained commitment. Early interventions are needed to move beyond pilots and reduce deployment uncertainty, while longer-term reforms are required to institutionalise AI use across infrastructure, governance, skills systems, and markets.

Accordingly, this chapter sets out a two-phase roadmap, structured around the five system dimensions:

Phase 1:

Enabling diffusion in practice with a focus on moving beyond pilots by reducing uncertainty, aligning systems, and enabling repeatable deployment.

Phase 2:

Institutionalising and scaling diffusion by embedding AI use into infrastructure, institutions, skills systems, and markets so adoption becomes routine rather than exceptional.

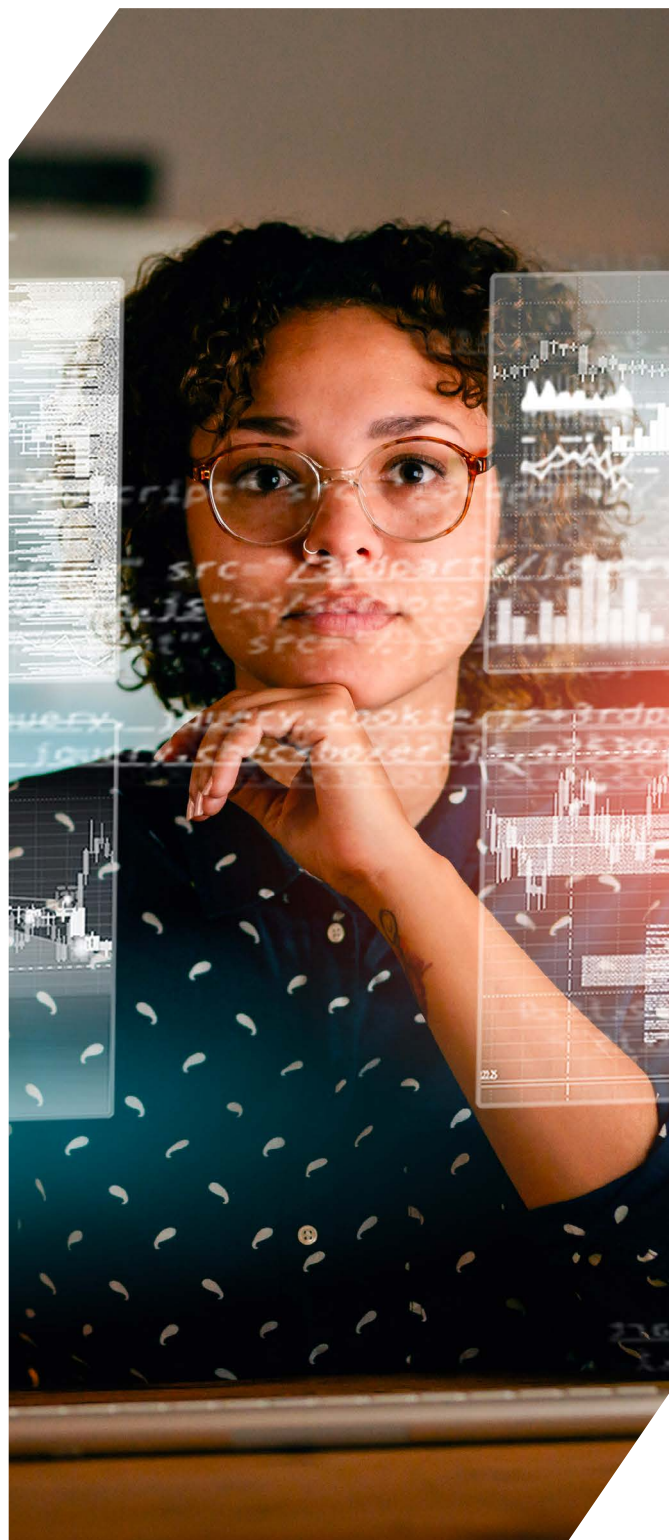


Figure 3

Recommendations for embedding AI across the economy

	Phase 1: Enabling diffusion in practice	Phase 2: Institutionalising and scaling diffusion
Align AI Infrastructure and Stack Pathways to Real-World Use 	Identify a limited set of diffusion-ready, high-frequency use cases across MSMEs, consumers, and frontline public services. Select fit-for-purpose AI stack pathways (centralised, edge/on-device, hybrid) based on connectivity, energy, cost, and data sensitivity.	Formalise multi-stack national AI strategies and consolidate successful deployments into reusable shared platforms. Align long-term energy and connectivity planning with AI demand; pursue regional/shared infrastructure and streamline approvals via one-stop access models.
Strengthening Data Governance, Trust, and Interoperability 	Establish minimum viable trust through clear, operational guidance on data use, safeguards, and accountability. Adopt use-case-led data governance tailored to different deployment models and risk levels.	Transition from static compliance to continuous assurance and lifecycle monitoring. Enable interoperable and trusted data sharing through portability frameworks, APIs, national repositories, and regional data corridors.
Reform Institutions and Procurement to Enable Repeatability 	Introduce AI procurement fast lanes and shift toward iterative, outcome-based purchasing models, allowing proven solutions to be reused and scaled across agencies. Develop standardised AI contract templates and risk-sharing arrangements to reduce transaction costs and lower barriers for MSMEs.	Move from project-based funding to programmatic AI platforms and shared procurement frameworks. Institutionalise learning by systematically capturing and sharing deployment lessons.
Build Skills and Organisational Readiness for Diffusion 	Prioritise baseline AI literacy for managers, frontline workers, and public servants. Align training with real deployment models and workflow redesign needs.	Embed AI into standard operating procedures, performance systems, and management frameworks. Scale sector-specific capabilities and support job redesign and workforce transition aligned with AI-enabled work models.
Create Early Demand Across Enterprises, Government, And Consumers 	Prioritise diffusion-ready AI use cases that integrate with existing infrastructure and act as anchor buyer to create predictable demand signals and reduce vendor lock-in. Support MSME adoption through shared platforms, low-cost toolkits, trusted intermediaries, and targeted incentives.	Scale consumer-facing AI applications that deliver visible improvements in access, cost, and service quality. Track diffusion outcomes across enterprises, government, and consumers, focusing on measurable impact rather than pilot counts.

3.1 Aligning AI Infrastructure and Stack Pathways to Real-World Use

Phase 1: Enabling diffusion in practice

1. Governments could identify a limited set of diffusion-ready priority use cases where AI can be deployed at scale by enterprises (particularly MSMEs), consumers, and frontline public services using existing capabilities. These should prioritise repeatable, high-frequency functions with visible productivity or service gains, including MSME productivity tools, consumer-facing applications, and frontline delivery in sectors such as health, finance, mobility, logistics, and agriculture.
2. For each priority use case, governments should explicitly select the most appropriate AI stack pathway, whether centralised, edge or on-device, or hybrid, based on local connectivity, energy reliability, cost structures, data sensitivity, and risk profiles, rather than defaulting to hyperscale or national infrastructure approaches.^{40,41}

Phase 2: Institutionalising and scaling diffusion

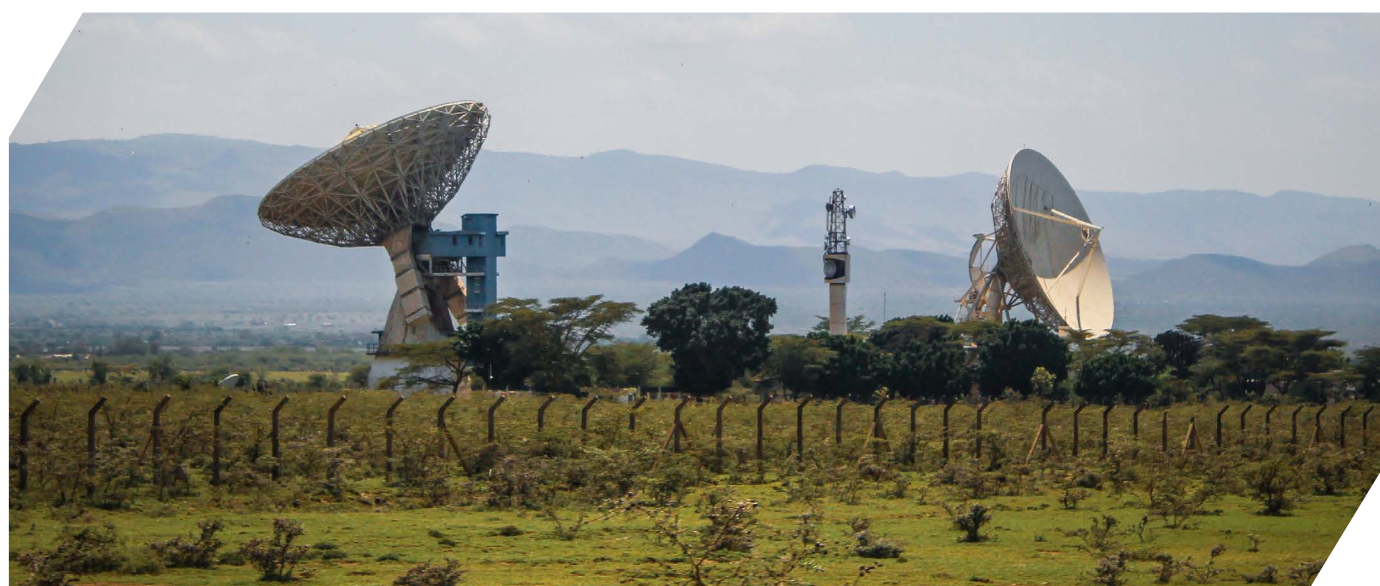
1. Governments could formalise multi-stack AI strategies that recognise centralised, decentralised, and hybrid deployment models as complementary and legitimate pathways and systematically consolidate successful deployments into shared platforms where appropriate.

2. Long-term energy and connectivity planning should be aligned with anticipated AI deployment needs, while regional and shared infrastructure partnerships should be pursued to reduce duplication, improve resilience, and lower costs. Clear criteria should guide national infrastructure investments and highlight when reuse across agencies is preferable with one-stop shops set up for streamlining approval, procurement, and access to AI infrastructure.⁴²

3.2 Strengthening Data Governance, Trust, and Interoperability

Phase 1: Enabling diffusion in practice

1. Governments could establish minimum viable trust for priority AI use cases by issuing clear, operational guidance on data use, focusing on what is permitted in practice, what safeguards apply, and who is accountable, rather than relying solely on high-level principles.⁴³
2. Data governance frameworks should be use-case-led, recognising that different AI deployment models place different demands on data governance. For example, on-device AI with minimal data transfer may warrant lighter requirements than large, centralised public-sector platforms.⁴⁴



Phase 2: Institutionalizing and scaling diffusion

1. As AI diffusion scales, governments should move from static compliance models to continuous assurance and monitoring, embedding trust and accountability into routine operations.
2. Governments could enable interoperable and trusted data sharing, including through data portability frameworks, national data repository, standardised APIs, and common technical standards. Trusted data corridors and regional arrangements can further support enterprise expansion and ecosystem growth, while preserving protections for personal and public data.⁴⁵

3.3 Reforming Institutions and Procurement to Enable Repeatability

Phase 1: Enabling diffusion in practice

3. Governments could introduce AI procurement fast lanes that allow for rapid testing, iteration, and deployment of AI solutions, alongside traditional procurement pathways while shifting public procurement frameworks towards iterative and outcome-based purchasing. This will enable AI solutions that work in one agency or service to be reused and expanded across others without restarting procurement processes.⁴⁶
4. Standardised AI contract templates and risk-sharing arrangements should be developed to reduce transaction costs and lower barriers for suppliers, particularly those serving MSMEs and consumer-facing markets.

Phase 2: Institutionalizing and scaling diffusion

1. Governments could move from project-based funding to programmatic approaches that support reusable AI services and platforms. Shared procurement frameworks and platforms should be established to allow multiple agencies and levels of government to adopt proven AI solutions more easily.⁴⁷
2. Institutional learning from AI deployment should be systematically captured and shared to reduce duplication and accelerate uptake across the public sector and beyond.⁴⁸



3.4 Building Skills and Organisational Readiness for Diffusion

Phase 1: Enabling diffusion in practice

1. Governments could prioritise baseline AI literacy for managers, frontline workers, and public servants, focusing on interpreting AI outputs, integrating AI into workflows, and exercising human judgement rather than on advanced technical skills alone.⁴⁹
2. Skills and training initiatives should be directly aligned with how AI is deployed in practice and with the redesign of organisational processes. Enterprise and consumer AI diffusion typically depends on domain and operational expertise that enables AI to be embedded in existing work processes, whereas government use emphasises governance, oversight, and assurance capacity.⁵⁰

Phase 2: Institutionalising and scaling diffusion

1. In the long term, governments could embed AI use into standard operating practices, performance frameworks, and management systems so that adoption becomes routine rather than discretionary.
2. Governments could scale sector-specific and managerial capabilities, while supporting job redesign and workforce transition to ensure AI diffusion delivers sustained productivity and inclusion gains. This includes aligning career pathways, incentives, and organisational structures with new ways of working enabled by AI, rather than layering technology onto legacy bureaucratic processes.

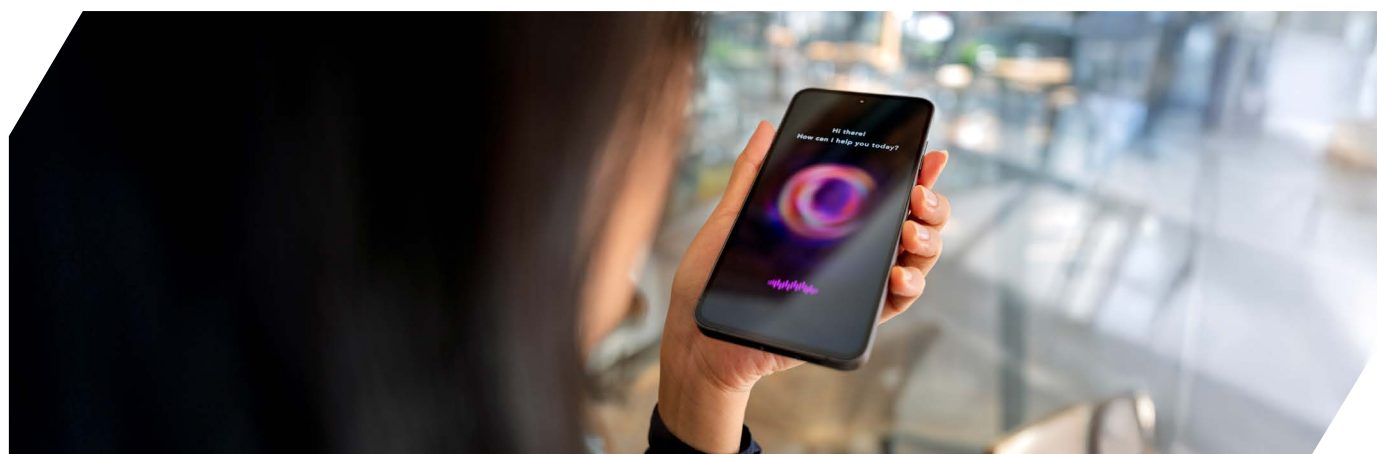
3.5 Creating Early Demand Across Enterprises, Government, and Consumers

Phase 1: Enabling diffusion in practice

1. Governments could prioritize AI use cases that can plug into existing digital infrastructure using open standards and interoperable architectures. By positioning themselves as anchor buyers and specifying these requirements in procurement and service delivery, governments can create stable demand signals for AI solutions that are reusable across agencies and reduce vendor lock-in.
2. MSME AI adoption should be promoted through shared data and compute platforms, low-cost AI toolkits, trusted intermediaries (e.g., industry associations or digital hubs), and incentives like tax credits or pooled procurement schemes rather than bespoke one-off solutions that do not scale.^{51,52}

Phase 2: Institutionalizing and scaling diffusion

1. Governments could prioritise consumer-facing AI applications that deliver clear and inclusive benefits in access, cost, or speed. Public communication could emphasize such practical improvements, rather than technical features, in order to build trust and sustained uptake.
2. Governments could design monitoring and evaluation frameworks to track diffusion outcomes, i.e., who is using AI, where, and with what measurable impact across enterprises, public services, and consumers, rather than counting pilots or tools deployed.



Box 3:

Diffusion lessons from Global South contexts

Overcoming barriers in infrastructure, governance, and talent is a long-term endeavour that requires meticulous planning and broad collaboration across public and private stakeholders. To scale AI equitably and avoid leaving large segments of society behind, a use-case-led regional approach offers a path for the Global South to advance its development and move beyond antiquated systems and processes.⁵³

A use-case-led approach involves developing high-impact applications in specific areas, such as payments, cybersecurity, agriculture, and citizen-facing public services. Prioritising use cases and applications can ensure that these solutions are addressing real-world challenges and delivering tangible improvements to citizens' lives. Such targeted efforts also create demonstrable evidence that can inform policy measures, attract investment, and guide the scaling of infrastructure and skills programmes.

In the face of infrastructural constraints, regional cooperation can help address these gaps by reducing costs, lowering latency, and strengthening smaller markets through pooled resources for model development, shared compute, and data trusts. By enabling smaller or less-resourced countries to access infrastructural capabilities that would otherwise be too costly to develop independently, such arrangements lower barriers to adoption and accelerate the diffusion of AI across the region. The SEA Lion LLM for multilingual AI in Southeast Asia and the African Union's continental AI strategy are both exemplary demonstrations of how shared resources and common strategy can support diffusion across diverse contexts.^{54,55}

Practical evidence of a use-case-led, bottom-up, regionally coordinated approach has begun to yield measurable results. Below are a few examples of successes noted in the Global South.



India

Indian public and private sectors are operationalising the use-case-led approach through developing AI solutions tailored to sectoral needs. For example, in agriculture, AI-powered advisory tools have been deployed in selected states to improve sowing decisions, input efficiency, and crop yields. States that currently adopt these tools, such as Andhra Pradesh and Maharashtra, have reported productivity gains of 30-50%.⁵⁶ In healthcare, the Ministry of Health and Family Welfare (MoHFW) has developed AI solutions such as the Clinical Decision Support System (CDSS) in e-Sanjeevani and the Abnormal Chest X-Ray Classifier Model to strengthen public health service delivery in the country.⁵⁷

The country has also strengthened coordination and shared resources to scale capacity. Under the India AI mission, the government provides essential infrastructures to spur innovation. This includes deploying GPUs through private-public collaborations,⁵⁸ developing multimodal and foundational models to support cross-sectoral usage,⁵⁹ offering start-up financing, and supporting access to datasets, models, and tools through AIKosh.⁶⁰

Early diffusion can be seen in private-sector adoption of AI. Approximately 65% of firms report investing in or experimenting with generative AI tools, and 79% of organisations say their investments in generative AI and automation have exceeded expectations, with 64% planning to scale these efforts. These trends underscore that coordinated governance, shared infrastructure, and local talent can accelerate adoption.⁶¹

Taken together, a use-case-driven, bottom-up, regionally coordinated approach, complemented by targeted policies, shared infrastructure, and talent development, can convert AI readiness into diffusion.



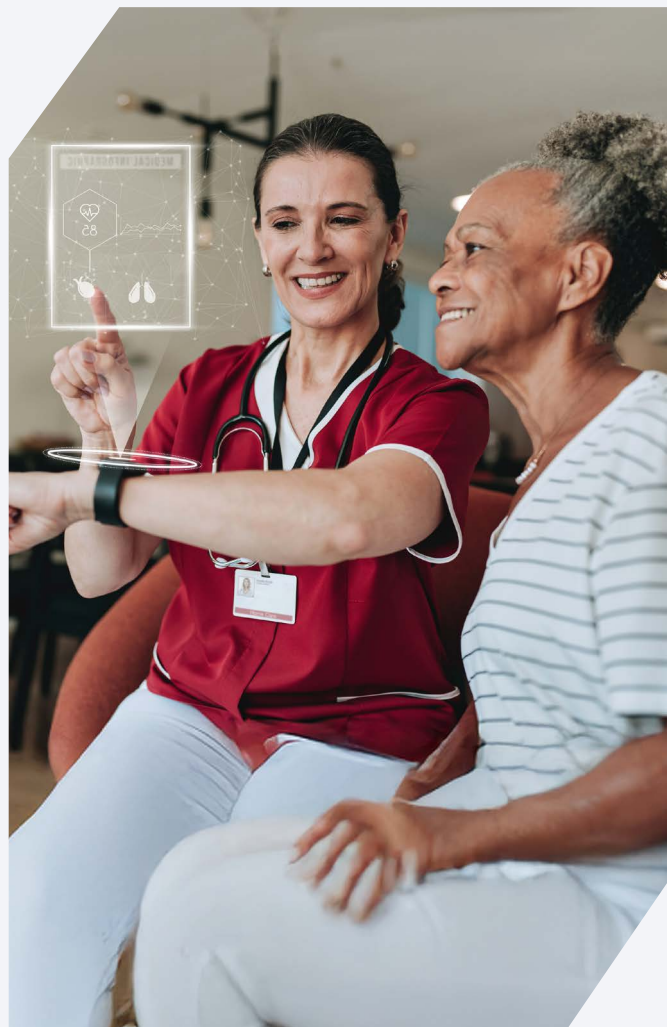
Brazil

In 2024, Brazil released a National Plan for AI (PBIA) for 2024-2028. The plan focuses on investing in AI infrastructure and development, diffusing AI across the economy through training and capacity building, using AI to improve public service delivery, encouraging businesses to adopt AI to drive innovation and adoption, and establishing governance frameworks to support the ethical and responsible use of AI.^{62,63}

Similar to India, the country is adopting a use-case-led approach to solve specific problems in priority sectors such as health, agriculture, education, energy, and public service delivery, amongst others. In the public sector, AI-enabled chatbots are being deployed to transform citizens' access to public services. For example, the city of Santana de Parnaíba in Brazil has implemented its chatbot "Anna" to handle citizen inquiries on 400 topics, from tax services to new decrees and public works.⁶⁴ In healthcare, the AI nucleus was widely used during COVID-19 to identify disease patterns, support doctors in triage, and determine appropriate treatment options. The AI nucleus is expected to be used as a blueprint for integrating the functionality into other platforms for other disease areas.⁶⁵

Additionally, the country is investing heavily in AI infrastructures, specifically in constructing data centres, developing high-performance processors, acquiring a supercomputer, and establishing a national network of AI centres of excellence.⁶⁶ For example, the country has allocated USD 337 million to upgrade the Santos Dumond supercomputer to advance the country's national data processing capacity.⁶⁷ To support adoption in the private sector, the government has also allocated nearly USD 2 billion to assist start-ups and MSMEs in integrating AI and developing AI-driven projects, with the aim of strengthening the AI value chain.⁶⁸

Supported by enabling policies and strategies, the country has experienced rapid AI adoption. A national survey identified 396 Brazilian AI companies focused on diverse applications,



including automation, analytics, and digital services.⁶⁹ Complementing this, 75% of the companies in Brazil are optimistic about the impact of AI on their work, while 73% plan to continue with their AI investment or consider making their first investments.⁷⁰

Again, Brazil demonstrates that a coordinated use-case led approach can accelerate the diffusion of AI across the economy. By coupling infrastructural investments with enabling governance frameworks and practical applications development in priority areas, Brazil is not only expanding its domestic AI capabilities but also fostering an AI value chain that supports innovation and sustainable growth.

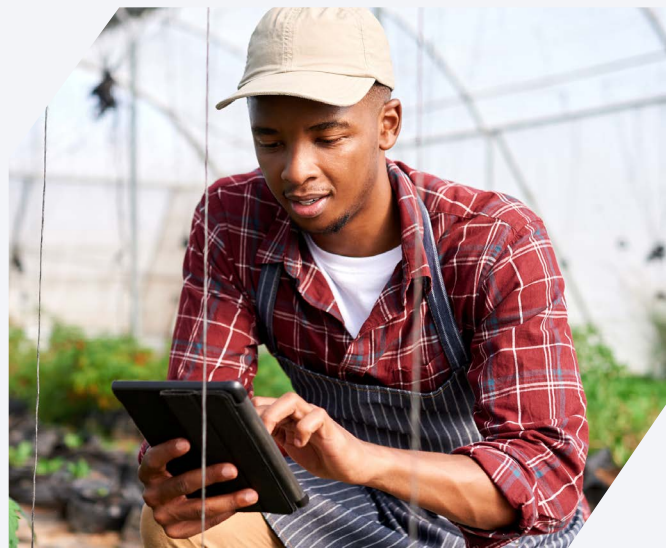
Rwanda

As AI investment becomes a growing component of foreign direct investment (FDI) in Africa, many countries on the continent are aiming to become a prominent player in the AI value chain by improving its AI readiness and adoption.⁷¹ One such country is Rwanda, which aims to position the country as Africa's AI Lab and Responsible AI Champion. Based on this directive, Rwanda has developed a National AI Policy in 2023 as a roadmap to achieving this vision. The policy focuses on 6 priority areas, including building infrastructure and computer capacity, building AI skills and literacy, establishing data strategy and practical ethical guidelines, as well as accelerating adoption through widening the adoption of AI in the public and private sectors.

To drive uptake, Rwanda has focuses on 8 sectors to accelerate the adoption of AI. These include healthcare, banking, e-commerce, transportation, agriculture, public administration, manufacturing and construction.⁷² To materialise this vision, the Rwanda Scaling Hub was launched in 2025 to serve as a central platform to identify, develop and scale high-impact AI solutions in the education, healthcare and agriculture sectors.⁷³ Specifically, the Hub supports locally developed AI solutions and assist startups with access to compute resources.⁷⁴ The hub currently has several flagship projects, including agriculture advisory via AI, AI powered telemedicine services for remote health consultations, and AI-based learning assessment for identifying learning gaps.⁷⁵

The policy also places strong emphasis in developing affordable, scalable storage and high-performance computing infrastructure. The envisioned output revising ICT procurement guidelines and contract management practices for cloud services and products, exploring the potential of creating a continental AI hub, and setting up a joint public-private multi-sectoral taskforce to develop frameworks and protocols for data sharing, amongst others.⁷⁶

As a result of enabling policies, several sectors in Rwanda have already seen concrete AI-based initiatives. In healthcare, a Rwanda-based startup



supported by the Rwanda Innovation Fund uses its AI- driven platform to connect clinics directly with medical suppliers to anticipate demand and automate procurement.⁷⁷ In agriculture, an AI-based advisory system developed by another Rwanda-based start-up, leverages satellite imagery and sensors to predict crop yields and recommend planting schedules.⁷⁸ In education, Rwanda has introduced “Digital Ambassadors” to deliver AI and digital literacy skills to remote areas.⁷⁹ A pilot project has also been implemented to help 90 high school students to enhance their math skills through personalised learning recommendations and exercises.⁸⁰

While still at an early stage, Rwanda has nevertheless shown that targeted investments in priority use cases, together with ecosystem-level support, can facilitate the effective diffusion of AI across the economy.

At Access Partnership, equitable diffusion underpins our work advising governments and organisations on frameworks that enable AI to contribute to inclusive economic growth, as well as to competitive advantages. Our engagements emphasise not only what AI can do, but who it serves and how its benefits are distributed, recognising that inclusive diffusion is essential to realising the full promise of this transformative technology.

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