May 2026
No. 24

AIIPI 2026: AI Investment for All – A Multidimensional Path to Inclusive and Sustainable Growth

A strategic tool to strengthen countries' AI potential

Policy Brief

Key points

- AI investment is highly geographically concentrated, underscoring the need for robust tools to assess countries' AI investment potential and help bridge these investment gaps.
- The drivers of AI investment extend beyond technological infrastructure alone: they are multidimensional, encompassing research and human capital, political and technological governance, the economic environment, statistical and data capacities, and digital infrastructure.
- The most advanced regions are characterized by strong performance in research, human capital, and well-developed digital infrastructure. In contrast, regions with consolidating potential possess important assets but often need to strengthen governance frameworks and research capabilities. Emerging regions benefit from the size of their market, yet continue to face constraints related to infrastructure gaps, limited human capital, and weaker institutional frameworks.
- Research and human capital constitute the primary levers of AI investment, in which all countries must invest to enhance their potential and remain competitive. Government effectiveness and data protection frameworks are critical enabling factors.

Introduction

Artificial Intelligence (AI) serves as a cornerstone of modern global economic transformation, offering unprecedented opportunities to accelerate development in critical sectors such as healthcare, agriculture, education, and inclusive finance, provided that capital is directed toward responsible pathways. Currently, AI investment remains heavily concentrated in OECD countries and China, leaving a persistent gap with the rest of the world. Addressing this disparity requires sophisticated analytical tools for identifying the most effective catch-up strategies. Furthermore, in an era of geopolitical competition over AI leadership, in which China and the United States hold a significant advantage, particularly in the field of research, an extensive understanding of global investment potential is essential for fostering international cooperation in strategic sectors.

To meet this need, we present the AI Investment Potential Index (AIIPI), a comprehensive framework assessing 193 countries. While existing indices, such as those by the Oxford Insights (2025) and the International Monetary Fund (2024),[1] provide valuable insights, the AIIPI distinguishes itself by focusing specifically on the potential for responsible and inclusive AI, adopting a multidimensional methodology based on a quantitative analysis of the variables explaining observed investments in AI. Each nation is assigned a score from 0 to 100 and categorized into one of four stages of advancement.[2]

[1] See Oxford Insights 2025 and Cazzaniga *et al.* 2024.

[2] The stages are defined as follows: Stage 1 "emerging potential" (AIIPI < 26), Stage 2 "consolidating potential" (AIIPI between 26 and 50), Stage 3 "advanced potential" (AIIPI between 51 and 75), and Stage 4 "global leaders" (AIIPI ≥ 76)

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The AIIPI is designed as a dual-purpose instrument:

- For governments, it serves as a diagnostic tool to benchmark attractiveness, compare with other countries and prioritize high-impact policy interventions.
- For the private sector, it provides investors, development banks, and business leaders with a data-driven roadmap to identify emerging opportunities in untapped markets.

The 2026 edition marks the third iteration of this index, maintaining methodological consistency with the 2025 framework (Addo *et al.* 2025) to ensure longitudinal comparability.[3] This year's findings[4] reveal a global landscape defined by stark regional disparities: while North America and select corridors in Europe and East Asia maintain stage 4 leadership, over 80% of the world remains in stage 2 or 3. These countries with intermediate potential must be the focus of targeted investments and public policies in order to reduce the digital divide and promote a more equitable global AI ecosystem. By identifying priority areas for investment, they enable countries, including the least developed, to enhance their potential in AI.

The conclusions of this *Policy Brief* place greater emphasis on the drivers of AI investment than the previous editions.

Drivers for increasing AI investment potential

The index can serve as a strategic tool for policymakers to guide AI investment strategies. It is built on the aggregation of 18 multidimensional indicators (see Figure 1), each representing a lever that can strengthen AI investment potential. The weight assigned to each indicator reflects its contribution to overall AI investment potential.[5] These 18 investment levers can be grouped into six major categories, providing a comprehensive overview of the key drivers of AI development.

At the global level, the key drivers of AI investment potential are, in order of importance:

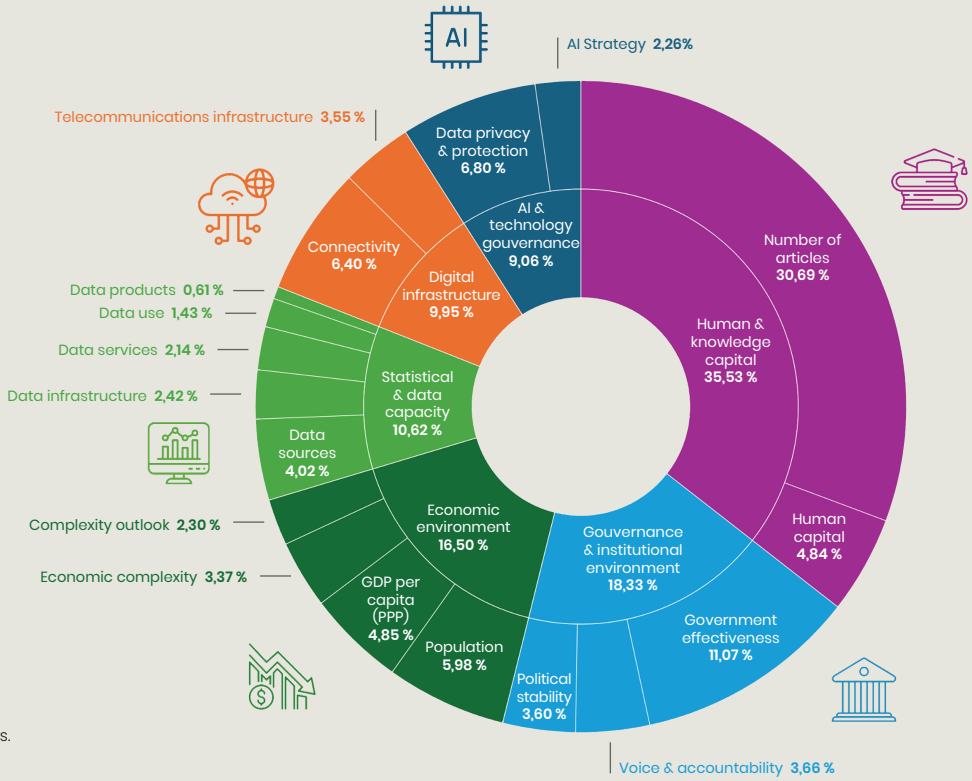
1) AI Research (30,69%), measured by the number of articles produced by each country;
2) Government Effectiveness (11,07%), which captures the quality of public services, the civil service, and public policies, as well as their independence and credibility;
3) Data Privacy and Protection (6,80%).

Far from being limited to technological investments, investment in AI must be supported simultaneously by investments in knowledge, governance, both general and specific to emerging technologies, a conducive economic environment, and robust digital infrastructure.

Global trends and regional recommendations for AI investment

In 2026, the global average level of AI readiness reaches 53, indicating an intermediate level of maturity. Behind this average, however, lies significant geographical fragmentation (see Map 1). Some regions benefit from advanced ecosystems, while others are still building them. Priority actions could significantly increase their potential (see Table 1). At the country level, some emerge as regional leaders, while others show strategic potential.

Figure 1 - AI investment drivers by category



Source: authors.

Explore the AI Potential Index :
aipotentialindex.org

[3] This year's edition uses 2024 data, supplemented, when unavailable, by data from 2023.

[4] They are freely accessible on the visualization platform: aipotentialindex.org and on data.gouv.fr: https://www.data.gouv.fr/datasets/index-du-potentiel-dinvestissement-dans-lia.

[5] For more details on how indicator weights are calculated, see the AIIPI 2025 methodology (Addo *et al.* 2025).

Map 1 - AI investment potential worldwide

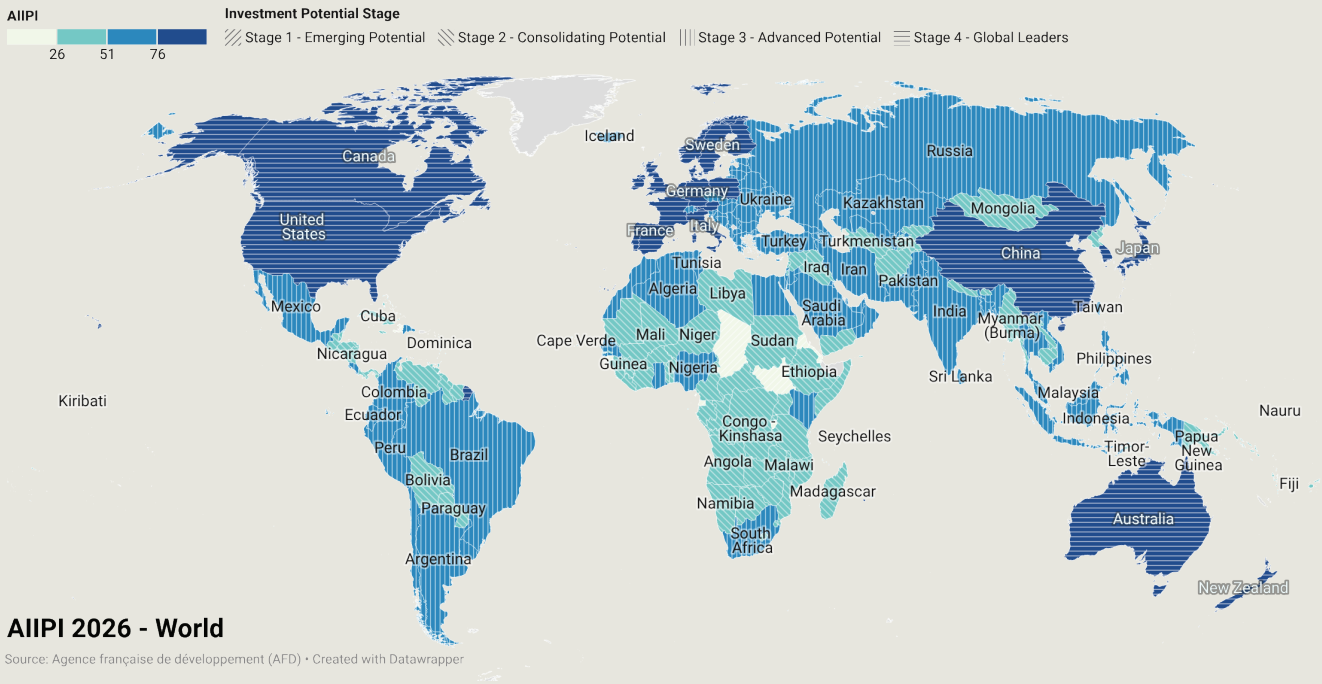


Table 1 - AI investment readiness & regional priorities

Region (Avg. AIIPI Score)	Readiness Level	Strategic Countries
North America (85)	**Stage 4:** Global Leaders	United States, Canada
Priority Policy Interventions: Maintain leadership by fortifying political stability and further advancing economic diversification.		
Europe & Central Asia (67)	**Stage 3:** Advanced Potential	Kazakhstan, Uzbekistan, Ukraine
Priority Policy Interventions: Boost competitiveness through AI research investment. Improve government effectiveness and economic diversification.		
Middle East & North Africa (55)	**Stage 3:** Advanced Potential	Morocco, Tunisia, Egypt, Jordan
Priority Policy Interventions: Invest in AI research. Strengthen data protection, enhance AI governance and institutional environment.		
East Asia & Pacific (52)	**Stage 3:** Advanced Potential	China (leader), Thailand, Vietnam, Indonesia
Priority Policy Interventions: Accelerate AI research output. Formalize national AI strategies alongside robust data privacy protection.		
South Asia (49)	**Stage 2:** Consolidating Potential	India (leader), Bangladesh, Sri Lanka, Pakistan
Priority Policy Interventions: Improve economic diversification and purchasing power. Strengthen political and AI-specific institutional governance.		
Latin America & Caribbean (48)	**Stage 2:** Consolidating Potential	Chile, Brazil (leaders) Peru, Ecuador, Colombia
Priority Policy Interventions: Prioritize AI research to expand the knowledge base. Develop long-term national AI strategies and drive economic diversification.		
Sub-Saharan Africa (38)	**Stage 2:** Consolidating Potential	South Africa (leader), Ghana, Senegal, Kenya
Priority Policy Interventions: Focus on foundational digital infrastructure, human capital development, and building a secure governance environment.		

How can countries increase their AI potential?

Recommendation 1. Develop dedicated financing tools for AI

The development of AI requires dedicated inclusive financing instruments that mobilize public, private, and development actors across different scales (national, regional, and continental). Establishing blended finance mechanisms (grants, concessional loans, venture capital) helps reduce risks and attract investment toward emerging ecosystems. It notably involves supporting dedicated AI funds, risk-sharing instruments (such as guarantees), as well as financing digital infrastructure, data, research, and human capital. The objective is to build a coordinated financing architecture that supports the entire AI value chain. International development financing should strategically prioritize stage 2 countries, particularly in Sub-Saharan Africa and South Asia, where targeted infrastructure investments can generate the highest returns in terms of sustainable growth and contribute to broader global economic stability.

Recommendation 2. Make research and human capital a top priority, regardless of countries' level of attractiveness

Human capital and AI research are the main determinants of AI investment potential, with research alone accounting for 30,7% of the model. The rise of AI in China illustrates this: it reflects decades of massive and sustained investment in research. Strengthening education systems, as well as scientific and technical training and AI research, helps build a pool of qualified talent, stimulate innovation, and attract international investment. These talents also form the foundation of resilient local ecosystems by anchoring endogenous innovation capacity and reducing dependence on external capital and infrastructure.

For countries at the least advanced stages, research also plays a key role in developing solutions tailored to local challenges (in health, education, or agriculture), including in local languages, thereby fostering inclusion (AFD 2025). Finally, public decision-makers should promote knowledge transfer between countries, particularly through structured diplomatic frameworks that enable stage 4 leaders to share their best practices with countries at lower stages.

Recommendation 3. Strengthen institutional governance and the economic environment

A strong institutional framework relies in particular on the effectiveness of public action, which accounts for 11,1% of the model, as well as on political stability, political participation, and accountability. The economic environment (standard of living per capita expressed in purchasing power parity, population indicating the size of the available market, and economic complexity, reflecting a country's ability to produce complex goods and, consequently, its level of skills and know-how) is also a factor in investment stability. It is essential for enhancing the credibility of public policies, reducing risks for investors, and supporting the emergence of AI markets. Policy frameworks should support the development of regional economic hubs by strengthening stage 3 countries that can serve as anchors of growth, fostering regional integration, resilience, and spillover benefits for neighboring economies.

Recommendation 4. Invest in digital infrastructure and statistical and data capacities

Digital infrastructure (connectivity, telecommunications) and statistical capacities (data infrastructure, data use, diversity of data sources, data services reflecting their quality, and data products indicating a country's ability to produce relevant indicators) are essential prerequisites, particularly for countries that are less advanced in AI. They enable the deployment of AI solutions, facilitate access to and use of local and contextualized data, and support the development of digital and AI ecosystems.

Recommendation 5. Structure the governance of technologies and data

The establishment of appropriate governance frameworks (particularly data privacy and protection, which accounts for 6,8% of the model, and the development of AI strategies) is crucial for securing digital uses, strengthening investor confidence, and promoting responsible applications of AI. Advancing countries from stage 2 to stage 3 require a concerted effort to harmonize trade and technology standards, thereby lowering barriers to entry for foreign direct investment and enhancing the attractiveness of emerging markets.

Recommendation 6. Progress across stages in line with countries' AI investment potential

Investment priorities evolve across stages.[6] All countries, regardless of their level, must strengthen AI research and talent: it supports local innovation in less advanced countries and enables more advanced ones to remain competitive in an increasingly global race. In addition, it is essential to prioritize:

- For countries with emerging and consolidating potential (stage 1 and 2): digital infrastructure, particularly telecommunications, as well as AI strategies and data protection.
- For countries with advanced potential and global leaders (stage 3 and 4): governance (government effectiveness, voice and accountability, and political stability) and the level of economic complexity.

[6] These analyses are based on comparing the average values of each indicator across AI development stages. For each indicator, a ratio between one stage and the immediately higher stage was calculated to identify the most significant gaps and, therefore, the key levers for progressing from one stage to the next.

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Agence française de développement (AFD)
5, rue Roland Barthes | 75012 Paris | France
Publishing director Rémy Rioux
Editor-in-chief Thomas Mélonio
Graphic design MeMo, Juliegilles, D. Cazeils
Layout eDeo-design.com
Translation Authors

Legal deposit 2sd quarter 2026 | **ISSN** 2742-5320
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Printed by the AFD reprographics department

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