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GSIS Analysis: Global AI Players? India, the UAE and the UK

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Cover: Liquid cooled servers in an installation at the Global Switch Docklands data centre campus in London, UK, on Monday, 16 June 2025. Nvidia Corp. (Photo by Jason Alden/Bloomberg via Getty Images)

GSIS Analysis:

Introduction

Emerging and disruptive technologies (EDTs) as a component of national security have made dual-use innovation a defining feature of today's geopolitical landscape. Intensifying global tensions – manifested through regional conflicts, tech-focused trade wars and industrial policy shifts – alongside lessons from the COVID-19 pandemic, have exposed deep-seated dependencies and related supply-chain vulnerabilities.

Within EDTs, innovation in the field of artificial intelligence (AI) has emerged as a critical capability that states and industry are pursuing for national security and commercial purposes, not least because AI serves as a meta-technology, i.e., it empowers and accelerates itself while simultaneously multiplying the benefits of other technologies. For example, AI converts data into intelligence through pattern recognition; enables robots to perceive, learn, adapt and communicate; accelerates medical and biotechnological innovations through analysis and discovery; and advances quantum computing through new material creation and advanced compute capabilities.

While the focus of the international debate on AI has mostly been on the leading powers – the United States and China – it is also critical to examine other powers that have ambitions in this space. This includes India, the United Arab Emirates and the United Kingdom. This analysis examines their respective national objectives and approaches in order to identify their respective geopolitical, economical and institutional challenges.

The Quest for AI Sovereignty

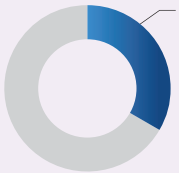
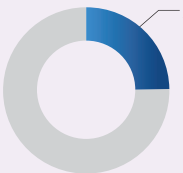
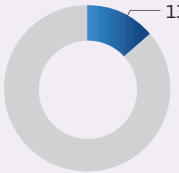
As the global AI leader, the US has emphasised AI dominance as integral to its national security and exercised tight export controls on critical components to restrict China's ability to use and innovate the technology.[1] The implications are evident across the technology stack – the set of technologies, both hardware and software, that are used to develop an application (AI in this context) – as states compete to retain superiority and supply-chain control. Countries are vying for greater access to and control of hardware, e.g., purchasing chips, investing in fabrication plants for semiconductors, incentivising research and development (R&D), to reduce their exposure to potentially harmful consequences of the ongoing US-China trade war. Contention extends to physical infrastructure, such as data centres, where reportedly only 32 states currently possess public cloud AI compute capacity, with the vast majority concentrated in the US, China and Europe.[2] To power these data centres and the public cloud, governments are partnering with industry to ease access to real estate and prioritise energy and water resources to support this critical infrastructure.

In their quest for AI sovereignty, some countries seek to develop their own foundational AI models and large training datasets. This aims to align data-privacy regulation and ethics with national values and culture, which in turn shapes the domain-specific data used to train new AI models. Across the tech stack, efforts are underpinned by the need to provide industry incentives and invest in long-term educational and research ecosystems to retain talent.

State ambitions for sovereign AI capabilities present both strategic opportunity and heightened complexity for industry. Public-private partnerships are essential to capability across the tech stack that can benefit domestic start-ups as well as multinational corporations. On the latter, leading US AI firms like OpenAI, Microsoft, Meta, Oracle and Google are aggressively pursuing international opportunities to expand AI infrastructure and adoption. Complexity arises for industries that may be affected by the expanding efforts of the US to limit China's access to these technologies. The options for state-to-state partnerships are shaped by geopolitics, and this has a trickle-down effect on the options for industry.

India illustrates the challenge and opportunity of AI, balancing the need to attract foreign investment and AI technology, while seeking to harness its large domestic talent base to create a sovereign AI model. The UAE, by contrast, offers insight into how a small, wealthy state is advancing technological leadership through agile state-led investment and a diverse

Figure 1: **At a glance: Approaches to AI Development in India, the UAE and the UK**

	INDIA	UNITED ARAB EMIRATES	UNITED KINGDOM
Summary of approach	Create an indigenous AI ecosystem while balancing the involvement of foreign partners.	Jumpstart an AI industry through the acquisition and rapid deployment of capabilities.	Use geostrategic positioning alongside mature research institutions to secure a competitive advantage in AI.
Aim	 "We want India to become a global hub for AI" Narendra Modi, Prime Minister	 "...[to] build an AI economy, not wait for one" Omar Sultan Al Olama, Minister of State for Artificial Intelligence	 "...[to] be an AI maker and not an AI taker" Sir Keir Starmer, Prime Minister
Start-ups and investments	Growing start-up environment with a dependence on government initiatives and grants. **Global private investment:** **USD1.16bn** in 2024[1]	Small start-up ecosystem. State sovereign funds invest internationally. **Global private investment:** **USD1.77bn** in 2024[1]	Notable growth in recent venture capital investment in UK AI start-ups. **Global private investment:** **USD4.52bn** in 2024[1]
Research	Second-largest contributor base (18%) to public generative AI projects on GitHub.	Established the world's first AI university: Mohamed Bin Zayed University of Artificial Intelligence.	Home to three of the top 10 universities globally for Engineering and Technology, with Oxford and Cambridge ranked 2nd and 4th respectively.
Industry role	Established Indian multinationals are seen as market enablers for international AI firms.	State-owned enterprises are central to international partnerships and drive domestic markets.	Attractive destination for US hyperscalers seeking closer access to EU markets.
Human resources	**Relative hiring rate year-over-year (2024)**  33.39%[1] **252%** Percentage change in AI talent concentration (2016 vs 2024)	 24.88%[1] **168%** Percentage change in AI talent concentration (2016 vs 2024)	 13.78%[1] **GBP 54m** global talent fund to support leading researchers for five years

[1]Sourced from Stanford University Institute for Human-Centered Artificial Intelligence, 'The 2025 AI Index Report'

Sources: IIISS CPFC Programme & Six Analytic; Stanford University Institute for Human-Centered Artificial Intelligence, 'The 2025 AI Index Report'

set of international partnerships. The UK continues to navigate post-Brexit technological sovereignty, seeking to capitalise on its world-leading R&D infrastructure, as well as its strong transatlantic and long-standing strategic partnerships.

India: Threading the Needle

India's AI ambitions stem from the government's decade-long efforts to boost its economy and standard of living by attracting manufacturing and industry to India. New Delhi seeks to become a 'Developed India by 2047' (*Viksit Bharat*) and a global power where the strategy for AI is to 'Make AI in India and Make AI work for India' through leveraging its large domestic talent base to create a homegrown, inclusive AI ecosystem.[3]

In 2018, India published a National Strategy for AI and its IndiaAI Mission was approved in 2024 with an allocation of more than US$1.3 billion over five years to catalyse the domestic AI ecosystem through public-private partnerships across the entire tech stack, including growing future talent.[4] The main objective is to democratise AI technology through publicly funded AI-compute infrastructure, thereby lowering the barrier of entry to access AI infrastructure and to Indian start-ups, research institutions and developers.[5] India also seeks its own Large Language Model (LLM) and recently selected Sarvam AI to build an open-source 120 bn parameter AI model for use in healthcare, defence and education.[6] These efforts aim to not only advance India's AI capabilities, but also to ensure the technology remains resource efficient and accessible to a greater range of sectors.

Internationally, India has deepened its tech engagements, particularly focusing on leveraging its digital public-infrastructure capabilities. As a member of several minilaterals, such as the Israel-India-UAE-US strategic partnership (I2U2) and the Quadrilateral Security Dialogue (Quad), it has benefited as technology components have become part of the regular dialogue.[7] Through the Quad, India has also sought to extend its bilateral AI collaboration with the US and Japan.[8] New Delhi has also deepened its partnership with the European Union, emphasising the mutual benefit of joint research in AI and its applications.[9] Through these, India has prioritised capacity building through scientific collaboration, AI for defence capabilities, and crucially the retention of intellectual property (IP) in India.

The success of India's AI ambitions will in part depend on its ability to reverse 'brain drain' through encouraging Indian talent to stay in-country.[10] In fact, since 2016, India has seen a 252% increase in its concentration of AI talent with more than a fifth of all AI researchers opting to stay and work in the country.[11] India's investment in its academic institutions and research clusters appears to also be paying off, with six of India's top engineering and technology universities moving up in global rankings between 2020 and 2025. Demonstrable of its growing talent, of the 150 million users on the open-source software development platform GitHub, Indian developers are the second-largest contributor base, at 18%, on public generative AI projects, representing a 79% increase over a single year.[12]

India's major industry players are appealing partners for global AI leaders and vice versa. International companies' partnership with Indian firms is helpful for smoother market access, indirectly aiding India's AI mission objectives.[13] Notable headlines include Reliance Industries, a dominant telecommunications provider, currently being courted by OpenAI and Meta for partnership, and which already works with Nvidia on AI data centres. Underlying the centrality of foreign-made chips to India's AI ambitions, Tata Group has launched its own cloud services and plans to build an AI supercomputer with Nvidia.[14] There has also been significant activity in India's start-up landscape, with AI firms receiving US$11.29bn in private investments between 2013 and 2024. In 2024 alone, an overall US$1.16bn was invested, and at least 74 AI start-ups received new funding.[15] There is, however, a limited amount of private-sector investment, and furthermore, limited interest from larger Indian firms. Government schemes are therefore central for India's national AI ambitions.

New Delhi is guiding the development of a domestic AI ecosystem to create resource-efficient AI technologies for the widest pool of adopters. Homegrown start-ups and the promotion of India's digital public infrastructure model, through bilaterals and minilaterals, are apparent priorities. Opportunities provided to Indian industry through partnerships with global AI leaders can create more opportunities for AI-based services, which will serve economic growth and talent retention. However, the success of foreign AI models at the expense of the development of a robust indigenous AI ecosystem could undermine India's own ambitions.

United Arab Emirates: Jumpstarting Capabilities

The UAE aims to become a global leader in AI by 2031, driven in part by its longstanding objectives of diversifying its economy away from oil and gas and achieving its Centennial 2071 vision to be 'the best country in the world'.[16] The UAE is notable for appointing the first state minister for AI, creating the first university for AI and planning to add, in 2026, an AI advisory member to the cabinet.[17] Underlying this is the 2017 National Strategy for AI, which outlined an eight-pillar strategy focused on developing a fertile AI ecosystem, including strong infrastructure, talent retention and adoption.[18]

Over the past five years, the UAE has prioritised the rapid scaling and integration of AI into the country's strongest sectors – resources and energy, logistics and transport, tourism and hospitality, and healthcare and cybersecurity – while advancing AI integration into government processes. Direct acquisition is critical to rapidly scaling the country's AI offerings, a practical pathway for the small, wealthy nation. This approach has hit setbacks, however, as the UAE's investment links with China has raised US concerns over advanced AI chips being shared, amid fear of technology transfer.[19] In May 2025, it committed to importing advanced AI chips from the US, including 500,000 Nvidia AI chips.[20]

The UAE's AI ambitions are enabled by its large, state-owned enterprises that have consolidated the market, invested in domestic capabilities and spearheaded international partnerships. EDGE Group, a technology and defence company, has emphasised the use of autonomous systems and projects most of its offerings to be AI-driven by 2027.[21] Group 42 (G42), a technology holding company backed by the Emirati sovereign wealth fund Mubadala, is a critical player for the UAE's AI strategy. The firm was compelled to sell its Chinese holdings in April 2024 to retain access to US technology. A move that has subsequently unlocked investment and partnerships with Microsoft, OpenAI, Dell, IBM, Nvidia and Oracle, some of which will expand the country's AI infrastructure with a five- gigawatt AI data-centre campus.[22] G42 and another holding company, ADQ, established a US$10bn fund for late-stage disruptive technology start-ups in 2022, while a G42 subsidiary, MGX, has focused on funding AI-related opportunities including the US-backed Stargate AI initiative.[23] A joint venture between G42 and global technology group e& – Khazna Data Centers – holds 74% of the countries data-centre market and has begun expanding outside the region through memorandums of understanding with multiple countries, such as Azerbaijan, Cyprus, Egypt, Greece, India, Indonesia, Kazakhstan, Kenya, Malaysia, the Philippines, Saudi Arabia, Turkiye and Uzbekistan.[24] Global private investment in AI in the country totalled US$1.77bn in 2024, almost doubling the private investments made in the previous ten-year period.[25]

Since 2020, the UAE has aggressively pursued its goal to become a global tech hub, as reflected in a network of trade agreements that facilitate digital commerce. While not exclusively focused on AI, it is pushing forward more than 30 Comprehensive Economic Partnership Agreements (CEPAs) that seek to reduce tariffs and bottlenecks around digital trade, e-commerce and investment in advanced industries. Ratified bilateral agreements with Cambodia, Costa Rica, Georgia, India, Indonesia, Jordan, Mauritius, Serbia and Turkiye connect the UAE to diverse economies, and, in the case of Israel, whose CEPA began in April 2023, provides the UAE with access to defence and surveillance technology.[26] While it has had to make shifts in committing to US AI requirements to draw in the necessary technology, its bilateral network seeks to provide markets for its own AI services.

With 88% of the UAE's population composed of foreigners, attracting overseas talent has always been central to its economy and daily functioning.[27] The country has sought to be part of the top 3 'brain gain' countries, and between 2016 and 2024 it has seen a 168% increase in AI talent concentration.[28] These developments have likely been supported by its recently expanded Golden visa programme which provides high-income 'outstanding specialised talents' a 10-year, tax-free residency permit.[29] The country has produced a few, yet increasingly influential, publications since 2021 – suggesting that its efforts to create a long-term research hub are working.[30] The UAE's approach leverages its immense financial capacity to buy technologies off the shelf, supported by the alignment of state and state-owned industry to jumpstart its AI capabilities. Creating favourable conditions for AI deployment through data centres, immigration incentives and bilateral trade agreements appears to be driven by the UAE's ambitions to become a world leader in AI. By importing an AI ecosystem that is hopefully ready-for-market, the UAE is hedging that its short-term gains will allow it the time to

build up domestic AI capabilities. This short-term approach will be tested as Saudi Arabia, with similar objectives and timelines, competes for regional market share.[31] Additionally, the UAE chose to acquire US-regulated AI advanced chips, providing it with quick access to capabilities, but if more efficient and cheaper models were to emerge out of China, it could negatively impact the investments made by the UAE.

United Kingdom: Strengthen the Advantage

The UK has struck out to be 'an AI maker, not an AI taker', seeking to take advantage of its position as the third-largest AI market in the world, valued at US$92bn in 2024.[32] It views AI as the 'single biggest lever' to grow the economy, reduce inequality, improve social welfare and security, and bring clean energy.[33] The government's most recent strategy, AI Opportunities Action Plan, divides the UK's approach into three areas: invest in the foundations of AI, encourage cross-economy AI adoption, and position the UK as the best state partner to build frontier AI technologies.

Since 2020, the UK has integrated collaboration on foundational aspects of AI into its longstanding strategic partnerships. For example, its recent agreements with Japan and India prioritise collaboration and inter-operability on technology, keeping the UK as an enabler of AI development.[34]

In 2023, the UK made a play to lead global discussions on AI governance with the inaugural AI Safety Summit, culminating in the Bletchley Declaration signed by 28 countries.[35] This agreement set out parameters for future collaboration prioritising safe, human-centric, trustworthy and responsible AI innovation. Unsurprisingly, the UK continues to engage closely with the US, with AI and other EDTs forming a thread of the broader US–UK Economic Prosperity Deal aimed at retaining alignment post-Brexit.[36] This transatlantic alignment on AI has resulted in some concessions by the UK, exemplified by the renaming of the UK 'AI Safety Institute' as the 'AI Security Institute' in February 2025, declining to sign the 2025 Paris AI summit declaration and recently softening its GDPR policy.[37]

Domestically, the UK holds a structural advantage when it comes to attracting AI talent, as it is home to three of the top ten ranked universities for engineering and technology and long-established R&D networks, resulting in notable research clusters and start-ups in London and Cambridge.[38] When compared with the US (home to four of the top ten universities), the UK has had a more conservative and less abundant venture capital (VC) ecosystem for start-ups, preventing it from capitalising on its strong research base, as seen with DeepMind (now Google DeepMind), which was a notable loss to backers from across the Atlantic.[39] However, the commercialisation of these technologies appears to be growing in the UK, where in October 2023 there were 3,700 companies developing and selling AI services, and as of July 2024 this growing AI sector has received an average investment of nearly GBP200m per day.[40] Of the US$28.17bn in private AI investment received by the UK in the 2013–2024 period, US$4.52bn (16%) was received in 2024 with 116 start-ups securing private investment.[41]

Addressing the scale-up gap appears to be a continued priority, as demonstrated in the 2025 Spending Review, which ringfenced GBP2bn to fund at least a twentyfold expansion of the UK's AI research resources and to support companies wanting to scale up through the creation of the UK Sovereign AI unit.[42] In June, the UK also launched a GBP54m global-talent fund to support world-class researchers for five years, with additional scholarships and fellowships seeking to attract talent.[43] This year, large tech companies like Amazon, Barclays, BT, Google, IBM, Intuit, Microsoft, Sage and Salesforce have announced a partnership with the UK government to upskill the national workforce through an AI skill drive aiming to upskill 7.5m workers.[44] US tech firms are also making large, multi-year investments in the UK's data infrastructure to meet increased domestic and European demand for computing power and cloud services for AI.[45] New AI infrastructure projects are being prioritised through AI 'growth zones' in regions outside London as part of a broader effort at economic revitalisation, though concerns remain over growing demand for energy resources and physical space.[46]

Overall, the UK's strategy emphasises R&D in foundational technologies, the domestic commercialisation of these technologies, global leadership in AI governance, and deepening pre-existing strategic alliances to maintain its competitive edge in AI – strategic advantages that will be essential. The UK sees AI as an opportunity to foster economic growth and is willing to make regu-

latory concessions to remain in good standing with the US government and attractive to US hyperscalers.[47] The UK maintains its lead with strategic advantages and clear economic opportunities, yet the technology must become more cost-efficient for domestic industry to take off.

Conclusion

These three case studies provide a snapshot of the different approaches taken by India, the UAE and the UK in fulfilling their AI priorities. India seeks to create a local AI ecosystem that relies on domestic capabilities, industry and talent while also courting select foreign partners and investors that can support innovation. The UAE uses state-owned enterprises as extensions of the state to jumpstart the country's AI future, focusing on the acquisition and rapid deployment of the technology creating supply-chain dependencies. The UK looks to capture a post-Brexit opportunity by relying on its mature R&D, education and improving its VC ecosystem environment to be an AI enabler and adopter.

While the UAE and UK have doubled down on their use of US-owned AI offerings, India has kept a focus on developing a homegrown foundational AI model. India sees this longer path as a necessary approach to ensure the technology remains cost-effective, as AI infrastructure is costly in requiring physical infrastructure and energy resources to power it. While countries like the UK and UAE can pull in talent and rapidly build out AI capabilities to serve the expanding market, they could be susceptible to adverse effects triggered by more resource-efficient models outside the US – like China's DeepSeek – which might threaten investments and their current high-investment approach to the AI tech stack.

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