



TECH, INNOVATION, AND SPACE

AI HORIZONS



DIALOGUES ON
AI IN THE GLOBAL SOUTH

SEPTEMBER 2026



MERIDIAN INTERNATIONAL CENTER

Meridian is a nonpartisan center for diplomacy founded in 1960 and headquartered on a historic campus in Washington, D.C. Our mission is to empower leaders to advance the next era of diplomacy for a better future. Our programs strengthen American leadership by accelerating collaboration on shared challenges, increasing economic competitiveness, and building geopolitical resilience. We equip leaders from business, science and technology, cities and states, culture and sports with the insights, networks, and resources to navigate a complex world.

THE CENTER FOR TECHNOLOGY, INNOVATION, AND SPACE

The Meridian Center for Technology, Innovation, and Space connects leaders from government, business, and civil society to navigate the diplomacy of emerging technologies. From AI and cybersecurity to energy and space cooperation, Meridian fosters international frameworks, builds strategic alliances, and protects U.S. interests in the most consequential arenas of global competition. As a trusted bridge between governments, technologists, and diplomats, TIS equips leaders with the insights, networks, and resources needed to navigate emerging technologies, strengthen international partnerships, and promote responsible innovation.

EXECUTIVE SUMMARY

This report synthesizes Meridian's AI Horizons roundtables on AI in Africa, Latin America, and the Middle East and North Africa. Across all three regions, participants converged on a single imperative: AI development in the Global South must be locally grounded, locally governed, and locally beneficial. They named persistent barriers — uneven digital and energy infrastructure, limited compute access, too little attention to local data, talent shortages, and low institutional trust — alongside real openings for innovation through small and open AI, diaspora engagement, workforce development, and regional collaboration. Realizing those openings requires moving beyond technology transfer toward co-created systems that build local capacity, meet local needs, and let countries in the Global South shape — not merely adopt — the future of AI.

ACKNOWLEDGEMENTS

We would like to thank the time and expertise of those who joined us for these inaugural conversations on AI in the Global South. We hope this report honors your voices and contributions to this dialogue, and that this is the first step in our process for amplifying the practices and innovations happening in these regions.

AUTHORS & CONTRIBUTORS

Elizabeth M. H. Newbury, Senior Director

Kellee Wicker, Vice President

Kara Struckman, Associate Program Officer

Isabelle Landy, Program Coordinator

Jessica Latos, Photography





Conversations in the Global North about artificial intelligence (AI) tend to be dominated by geopolitical concerns – who will claim global leadership of AI’s development and its governance – and a focus on the bleeding edge of AI progress, models with trillions of parameters trained on hundreds of thousands of GPUs. These conversations risk missing where much of the AI revolution will take place: in the hands of everyday individuals seeking to use models and tools that fit their needs and their resources. Many of these individuals living in Global South countries are often ignored by geopolitical conversations; many of the problems they seek to solve with AI are unknown to frontier developers.

Building a pathway for AI transformation to reach individuals around the world and improve their lives requires careful consideration of these very people. The policy and technology leaders of the world must consider how access to AI will reach the Global South. They must also understand that we all stand to benefit from the value and innovation unleashed by accelerating the growth of AI ecosystems in the Global South. The insights needed to build this pathway will come from a multiplicity of stakeholders, particularly those who represent the entrepreneurs, business owners, capital investors, and academics of the Global South.

PARTICIPANTS & SCOPE

03

To convene these voices and begin the conversation, we conducted three roundtables, held at Meridian International Center in a series: one for the African region on April 17, 2026; one focusing on the Latin American region on May 19, 2026; and one on the Middle East and North Africa (MENA) region on June 15, 2026. Each roundtable had approximately 20-25 participants, ranging from stakeholders from the government (such as Embassy representatives), diaspora (such as official diaspora organizations, as well as small businesses from the diaspora), academics studying the region, non-governmental organizations, entrepreneurs, and industry leaders.

At each roundtable, we asked the same questions around consistent themes, posed to participants in advance:

- **Opportunities:** In which sectors or areas is AI creating the most meaningful impact across the region today, and what makes certain contexts ripe for it?
- **Challenges:** What are the most significant barriers preventing the region's AI ecosystems from scaling, and which ones are most urgent to address? Infrastructure, compute shortages, locally relevant data, and brain drain are frequently cited, but the reality varies significantly by city, nation, or region.
- **Recommendations:** What would it take to strengthen and scale durable, locally rooted AI ecosystems in the region — and who needs to do what?

Notes were taken by hand but aggregated using AI to identify key themes. Following Meridian House Rule, the insights below are presented anonymously. The information below is presented as a synthesis from across the roundtables, unless otherwise noted.



BUILDING LOCAL AI TO SOLVE LOCAL ISSUES

- Key challenge: Lack of local ownership, agency, and training data.
- Key opportunity: Domestic actors motivate the creation of AI systems grounded in local data and context, while external actors prioritize investments that build local capacity and leave behind increased capacity.

Too often the Global South is viewed solely as consumers of foreign technologies built by outside actors, instead of a region with the agency to build AI systems trained on local data to solve local issues. A major barrier to regions' ability to leverage AI systems is the basic fact that these systems are often trained on data from outside populations and non-native contexts that do not adequately reflect local realities in the region.

At the African roundtable, this was framed as an ownership concern: Africans need to have agency and ownership over the AI that they use. In the MENA roundtable and context, this was framed as a capacity concern; for example, needing to develop local talent pools to address local issues. In the Latin American context, this was framed as a need for adoption that generates longstanding value over isolated products.

Beyond the issue of being treated as consumers or recipients alone, one concern voiced by those around the Global South is the potential for private companies to exit the regions abruptly. To roughly quote one participant, "We don't want an international company to take money and leave." A solution is instead to build knowledge exchanges, putting participants on equal footing: a stakeholder bringing in external expertise and international context, a stakeholder providing localized context, and a local company that stays to maintain what was designed and implemented.

Locally relevant data and regional adaptation are opportunities for growth and seen as central to ownership of AI ecosystems. By focusing on building out local datasets, local languages, local governance models, and using AI for local solutions, AI can be grounded in the reality of the region

An example of a push towards local infrastructure is Peru's National AI Strategy (ENIA). Developed alongside a separate National Data Governance Strategy and a National Digital Talent Strategy, the ENIA is expansive and attempts to regulate central components surrounding AI. It treats data governance and human capital as significant infrastructure needs central to implementing the AI plan and treats AI as a cross-sector opportunity between academia, industry, and civil society.[1] It maps out the institutions, standards, partnerships, and overall infrastructure needed to promote AI locally. Significantly, the ENIA and joint strategies across Peruvian agencies also lay out key data protections and authorities that strive to supervise the inputs (data) to AI systems, not just mandate what AI can be used for or deliver.

Further reading: Gajate, C., & Hopkins, J. J. (2026, February 17). AI laws and regulation in Peru. CMS Legal. <https://cms.law/en/int/expert-guides/ai-regulation-scanner/peru>

Adopting locally-developed open-source models or tools is another potential solution. Open source and “small AI” offer an avenue to increase accessibility while simultaneously lowering cost. Open-source production could be a competitive differentiator for distribution, allowing culturally relevant solutions without proprietary licensing constraints. At the same time, open source could open the door to other types of foreign interference if relying on foreign open-source AI. Focusing on locally built or locally tuned open-source models, not just using foreign open-source models, addresses this.



DIGITAL INFRASTRUCTURE: DIGITAL DIVIDE AND RELIABLE ACCESS PRESENT REAL BARRIERS

- Key challenge: Infrastructure is unevenly available, unreliable, or too expensive.
- Key opportunity: Build new pathways to reliable connectivity and energy infrastructure, with a focus on reducing geographic disparities.

One participant put it bluntly, “No internet, no AI.” If the digital infrastructure does not reliably support intended users to access AI technologies, successful AI innovation is unlikely.

Lack of country-wide connectivity may exacerbate the already-present digital divide with AI adoption. The African and Latin American roundtables grounded this in concerns around rural-urban divides and geographic inequality. Across these regions, AI is concentrated in urban

“No internet, no AI.” 

areas and risks exacerbating a rural-urban divide. In addition to access to connection, the quality of connection is also a concern as some networks in

the region still rely on 3G. The digital divide was very real, and a key barrier to AI adoption. Connectivity gaps can lead to uneven adoption within a country but also on a regional scale, with connectivity and compute infrastructure heavily concentrated in select countries. In Africa, for example, participants cited South Africa, Ghana, Kenya, and Nigeria as of countries offering better-than-average infrastructure.

It should be noted that in MENA, the primary infrastructure concern was less network connectivity and more energy infrastructures. Here, participants contrasted the Gulf Cooperation Council (GCC) states and non-GCC, non-energy-producing countries which face different conditions and adoption rates. In non-GCC countries, access concerns are not centered around network penetration but regular rolling blackouts and in energy demands stemming from data centers. Compounding this are fragile supply chains easily disrupted by conflict. Consequently, the digital infrastructure in this region is, likewise, vulnerable.

COMPUTE: HIGH EXPENSE COULD DRIVE INNOVATION IN SMALL AI

- Key challenge: High compute costs create a barrier to local innovation.
- Key opportunity: Pool resources through regional collaboration, and shift focus toward tools based on smaller, more selective, and edge-based AI models.

Compute is expensive, particularly in countries and regions with infrastructure gaps, and the expense of compute also hinges on energy and access to foreign services. The cost for tokens in these regions can be extremely high, and big tech does not scale its prices to the local economy. One entrepreneur noted, “If you want local solutions for innovators, prices need to match revenues.”

However, in the face of high expenses whether in terms of purchasing compute or building local compute resources, an emphasis on smaller and/or more selective models and other opportunities around

edge computing can reduce compute demand but still deliver effective tools and solutions. The Global South could turn to AI tuned for smaller needs, running on everyday devices, and using low-cost tools to mitigate high costs.

“No country can solve the compute deficit on its own.” 

More than one pathway to unlocking compute resources exists. One avenue to support compute buildout is collaboration, either across regions or supporting private industry, although coalition building can be difficult politically. As one participant phrased it, “No country can solve the compute deficit on its own.” A regional infrastructure could pool resources for compute as well as other key bottlenecks of AI inputs. Another solution is making infrastructure available to local companies that can be rented out at a more affordable cost, supporting entrepreneurship or venture capital opportunities.

DATA: CALL FOR MORE AVAILABILITY AND CLEAR STRUCTURE

- Key challenge: Local data is not accessible to AI systems, or has not been digitized.
- Key opportunity: Digitize and curate local datasets while strengthening governance to guide its secure and effective use.

One participant observed, “Africa is building an AI plan on sand.” In the Global South, the data is not reliably there to support a competitive edge in AI. African roundtable participants argued most of the training data is dominated by English-language and centered in Western cultures. Language was not, however, a concern across all roundtables. In contrast, a participant observed Arabic already has a large representation on the internet. This availability of data in Arabic puts the region, some argued, on a different footing when it comes to applying AI.



Only 2-3% of AI models are trained on Spanish or Portuguese, the languages that dominate Latin America. To solve this issue, Chile's National Center for Artificial Intelligence (CENIA) led an initiative across 15 countries to create an open source large language model (LLM), LatamGPT, specifically trained on local, regional data. Released in February 2026, the model's development took about two years and is regarded as one of the best examples of successful regional collaboration leading to competitive products.

Further reading: Rivero, E. (2026, March 2). LatamGPT navigates the gap between regional aspiration and market realities. Tech Policy Press. <https://www.techpolicy.press/latamgpt-navigates-the-gap-between-regional-aspiration-and-market-realities/>



Where locally relevant data does exist, it is not properly cleaned, curated, stored, or otherwise structured in a way that makes it accessible for AI use. Participants pointed to the lack of digitized records in many countries. For instance, according to participants with local knowledge, many institutions in Latin America are still moving from paper-based systems into digital systems.

Several participants described work like data digitization as unglamorous but essential to access data and train AI systems on localized data. Foundational systems like property

registries, court systems, identity systems, and transaction records must be digitized before AI can realize its potential.

“Africa is building an AI plan on sand.” ↙

There is also concern around a lack of data control and responsibility, with low capacity for independent regulatory development and enforcement. “Checks and balances can be a risk when talking about using public data to provide services,” one participant observed.

Participants differed as to which type of actor would be best positioned to hold responsibility and control of this powerful AI input, however. The government is in a primary position to enact data control and responsibility for the health of datasets, but in some countries public trust in the government remains low. At the same time, there are currently few instruments in place to hold the private sector accountable to ensure their activity is ethical and serves the region.

HUMAN CAPITAL & EDUCATION: BASIC LITERACY AND TALENT RETENTION MAJOR OBSTACLES

- Key challenge: Talent shortages compounded by basic digital literacy gaps.
- Key opportunity: Invest in training at all levels, from basic literacy to improved technical education to leadership training.

The need for a sufficiently educated and skilled workforce to implement AI is on par with the need for infrastructure to support AI. Talent development was seen as a significant structural bottle neck for AI in the Global South with shortages cited in machine learning talent, data science expertise, data literacy, and technical workforce capacity. Simply put, AI cannot scale without a workforce and government prepared to engage with it. Broad concerns about preparing the workforce and the next generation included education systems moving slower than AI development, a need for lifelong learning to help support a skilled workforce, limited responsible-AI expertise, and lack of broad-based workforce preparedness.

An example of innovative training efforts is the Labour Fund of Bahrain's "AI Training Program" launched in 2025 to train 50,000 Bahrainis by 2030. This deploys three tracks: AI Generalists, for employees with foundational IT literacy; AI for Executives, targeting C-suite leaders and entrepreneurs; and AI Specialists, for highly technical roles. Enrollment for the program runs through private sector employers, and Tamkeen frames the goal around labor-market alignment, equipping Bahraini talent with future-ready skills in line with its mandate of making Bahrainis "the first choice for employment."

Further reading: Tamkeen. (2025, June 30). As part of the initiative to train 50,000 Bahrainis in AI skills by 2030 Tamkeen opens registration to enterprises for the "AI Training Program." <https://www.tamkeen.bh/en/ai-skills-training-tamkeen/>





Interestingly, many participants agreed that leadership is the bottleneck for further implementation and an important target for AI literacy and training. Leadership within private companies or government needs to both be trained to use AI in their own careers as well as to understand the importance of investing more deeply in AI education to more effectively implement AI adoption and innovation strategies.

For some, the Global South's relatively young workforce is an advantage in AI talent development, workforce adaptability, and entrepreneurial culture. However, talent retention is key to harnessing this strength. Workforce capacity concerns walked a line between the desire to prepare the workforce for good-paying jobs of the future that meet regional needs, and the fear of increasing brain drain and talent retention issues. Losing skilled workers to more affluent jobs elsewhere would lead to both a reliance on external expertise and greater difficulties in building long-term capacity. The challenge is not simply talent creation but talent retention.



THE DIASPORA AS A STRATEGIC ASSET

- Key challenge: Concerning trends around talent going overseas.
- Key opportunity: Leverage diaspora leaders as a bridge to capital, ideas, talent, and global reach.

One opportunity that surfaced centered on the diaspora communities surrounding those respective regions.

Global South countries are the source of major diasporas that have spread around the world, often referred to in a negative sense as brain drain, but seen at times in discussions as a potential significant force for positive change. Some participants at the MENA roundtable shared the reverse view:

students leaving the region for educational opportunities and jobs elsewhere contributes to an overall loss of local talent.

Latin American and African discussants approached the diaspora with a more positive view, seeing them as partners to the region and connectors to global markets. The diaspora

presents an opportunity to build up skills and knowledge related to AI in the region and can form a bridge for capital to come to the region.



The ability to operate as a trusted partner in both contexts, foreign and local, is perhaps the biggest asset of the diaspora. Diaspora entrepreneurs possess a level of trust and cultural understanding that foreign actors often lack, and their ability to navigate foreign countries' tech ecosystems also allows them to bring lessons learned abroad to foster native tech growth. The diaspora may offer an avenue to co-creation with both governments and private partners, if cultivated by those same stakeholders.

GOVERNANCE: A CALL FOR REGIONAL STRATEGY

13

- Key challenge: Governance lags well behind deployment, and trust in institutions is generally low.
- Key opportunity: Build accountability and seek regional collaboration for shared strategy and resources.

AI governance in the Global South – and elsewhere – is largely an emerging field, with some countries leading the way but most lagging behind. Developing strong AI governance offers several advantages, including standing strong against outside influences, promoting security and protecting public data. But with limited checks and balances, accountability, and a host of regulatory uncertainty, not to mention difficulty keeping up with ongoing AI developments, the path forward is an uncertain one.

Simply adopting a strategy or policy framework is not a goal in and of itself, although it likely does represent a victory of coalition-building or national alignment on the path forward. To genuinely offer guidance that improves a country's positioning in the AI age, a strategy should be specific, well-matched to country goals and strengths, and funded appropriately to move the action from desire to reality. Among those countries that have adopted a strategy, some may not have chosen a feasible approach or may have unfocused or undirected goals, making it difficult for a strategy to translate into real benefit or change.

For robust governance and investment in a resource-constrained environment, regional collaborations and agreements that provide a legal framework could promote investments, help surmount compute deficits, provide strong data frameworks and overall ensure the cross-pollination of both resources and talent was greatly supported. “The stories here are regional; success isn't constrained to one economy,” one participant said at the MENA roundtable, while the Latin American roundtable ended on the note, “Regional collaboration is the way forward.”

Successful examples exist that can serve as a blueprint or a foundation for genuine commitment and policy action, such as the OAS working group on AI governance or the African Union's continental AI strategy. But where many participants were in favor of a regional approach to AI innovation and governance as the ideal solution to helping regions in the Global South secure their future in AI,

there was also cynicism: mistrust and competition between countries have repeatedly defeated attempts. One participant asked, "Who can gather the region behind them? Who is willing to put the resources into being a regional leader?"

"Who can gather the region behind them? Who is willing to put the resources into being a regional leader?"

This lack of faith in the government to execute on the vision was a barrier to both governance and regional cooperation. For example, Latin American discussants singled out government corruption as a barrier to effective AI governance. This corruption leads not only to low public trust in government's ability to guide a country's use of AI and its approach to guiding ethical and safe use, but also a general reluctance for entrepreneurs in the space to work with governments. In contrast, at the MENA roundtable, the lack of institutional trust was framed in terms of state surveillance and a lack of security in the region. Conflict in the region is a pivotal barrier to the sense that the governments could deliver on promises in AI governance, especially as that conflict directly undermined reliable access to supply chains underpinning AI. In many ways, a lack of trust and stability in government was a unifying sentiment across roundtables and a key barrier to AI innovation in the Global South which cannot be ignored.





AI's full potential cannot be realized without looking to and learning from the Global South. While there is great variety in the Global South and as such varying obstacles and potential solutions to AI adoption and innovation, clear throughlines emerged in our discussions. There are some barriers that seem insurmountable to AI adoption and innovation in the Global South; a lack of trust in the government, private sector, and foreign institutions for one.

But there were also clear opportunities. The strongest throughline across roundtables was upskilling homegrown talent to apply AI to local problems, using local data and context, as a way of securing ownership, agency, and opportunity in AI. Locally grounded AI solutions mean new markets, partnerships, and sources of innovation that benefit the world at large. Governments need to think smaller, rather than bigger; to build on native strengths and skills and deliver innovations only they are positioned to identify; to focus on strengthening local data infrastructure and securing it; to think of ways to tap into the diaspora that some are afraid of losing; and to think of ways to reach across borders and across stakeholders to form a united strategy for AI success in the Global South.



TECH, INNOVATION, AND SPACE

MERIDIAN INTERNATIONAL CENTER

info@meridian.org
Email

www.meridian.org
Website

Instagram [@meridianintl](#)

[LinkedIn](#)

1630 Crescent Place, NW, Washington, DC
20009
Address