

Global AI Governance Index (2026)

——Perspectives from the Global South and Capacity Building

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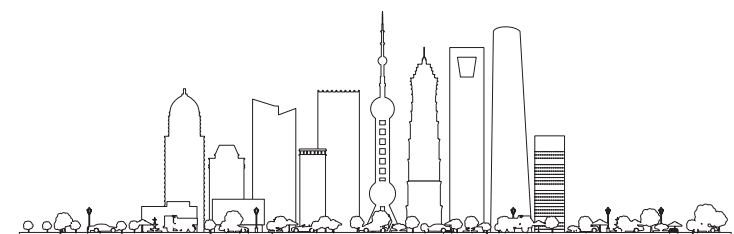
FUDAN REPORT SERIES

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Center for Global AI Innovative Governance

July 2026



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“Artificial intelligence can be an international
public good that benefits humanity.”

- Xi Jinping



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I. Introduction

(i) AGI Draws Near and the Urgency of AI Governance

At present, discussions of Artificial General Intelligence (AGI) have become a pivotal question in AI governance today. Among the boldest predictions, Dario Amodei, chief executive of Anthropic, has repeatedly suggested that AGI could arrive between 2026 and 2027. In industry debate, certain frontier models, including Mythos 5 and Fable 5, are already regarded by some as early precursors of such general

intelligence, in which observers claim to glimpse the outline of AGI.

There is, of course, a more controversial theoretical question surrounding AGI: to date it has no precise or generally accepted definition. In other words, a consensus on the true nature of AGI remains elusive among various parties. What they do largely agree on is something else: AGI is likely not a single moment in time but a process that unfolds progressively. Either way, its accelerating

arrival is likely to be a central theme of AI governance in the years ahead. This points to a critical tension: while the horizon of AGI is rushing toward us at an accelerating pace, societal adaptation lags far behind, and the gap between the two is widening. At the same time, training frontier models demands astronomical investments of computing power and capital, concentrating resources in a handful of leading firms. Today the most concentrated resources rest with a few companies, including Anthropic, OpenAI, and Google. Against the backdrop of AGI’s potentially rapid arrival, in short, global AI governance faces unprecedented challenges.

AI governance today must therefore attend closely to the rapid approach of AGI, while also examining the deeper structural problems beneath global governance, especially the increasingly marginalized position of Global South countries in this process. The acute concentration of capability and resources means that, absent deliberate institutional arrangements, the dividends and the leading voice of the AGI era may tilt still further toward a few developed countries and leading firms, leaving the broad ranks of the Global South at risk of being further sidelined.

(ii) Existing Assessment Tools and the Position of This Report

A number of AI-related assessment tools have emerged internationally in recent years. Two indices are particularly representative and serve as important reference points and interlocutors for this report.

The first is the Global AI Vibrancy Tool developed by the Stanford Institute for Human-Centered Artificial Intelligence (HAI), led by Professor Fei-Fei Li. Its central question is the overall vibrancy of AI across countries. The tool compares over thirty countries based on more than forty indicators, aggregating the findings into domains such as innovation, economic competitiveness, policy governance, and public engagement. This evaluation spans eight core dimensions: research and development, responsible AI, economy, education, diversity, policy and governance, public opinion, and infrastructure. On balance, this index leans heavily toward measuring technological capability and hard power.

The second is the AI Governance International Evaluation Index 2025 (AGILE Index) released by Professor Zeng

Yi's team. It comprises four evaluation pillars: development level, governance environment, governance instruments, and governance effectiveness, and assesses forty countries. Methodologically, it integrates diverse data, including policy documents and research output, and tracks data on AI risk incidents in particular. On balance, this index functions primarily as a diagnostic tool for measuring governance maturity.

This report holds that global AI governance faces three central contradictions: the tension between technological emergence and a governance deficit; the friction between national sovereignty and global governance; and the clash between superpower hegemony and the Global South. Building on the strengths of the two indices above, this report advances its own analytical framework. Specifically, the computing power, algorithms, and data of the capability layer correspond to the infrastructure and research-and-development pillars of the earlier indices, while the responsibility layer overlaps considerably with their attention to governance risk and governance maturity. On this basis, the index makes its own original contribution: it proposes

inclusiveness and sustainability as two further dimensions central to judging the quality of AI governance, and establishes both as Tier-1 indicators.

This original contribution brings together a global perspective, with a particular emphasis on the vantage point of the Global South. Assistance, accessibility, and inclusion under the inclusiveness dimension are precisely the concerns typical of Global South countries. Although earlier research included diversity and responsible-AI pillars, these mainly measured diversity and compliance within a single country's system and did not address cross-border redistribution or assistance, such as the volume of assistance extended to the Global South and the degree to which it is untied. Earlier inclusion indicators, moreover, approached the subject largely from the angle of governance and international cooperation, with their center of gravity still on governance maturity and risk resilience rather than assistance and affordability. As for sustainability, this report characterizes it through the classic framework of environment, economy, and society. Building on existing scholarship, the report seeks to bring the perspective of the Global South more fully into the

assessment of AI governance.

(iii) Two Core Ideas: Balance and a Graduated Structure

Given this positioning, the report reflects two important ideas.

The first is balance, which manifests primarily as the equilibrium between capability and governance. Governance must be anchored in a baseline of technological capability; without commensurate capability, any discourse on governance rings hollow. Yet once a country attains substantial AI capability, it must place a premium on governance, and neither AI capability nor governance can be neglected. Furthermore, balance entails parity between the Global North and Global South. In the current landscape, Northern countries clearly hold a louder voice, which makes it all the more important to emphasize inclusiveness toward the South, together with support for its capacity building. Only in this way can a more balanced global AI governance be achieved.

The second is a graduated structure. An inherent hierarchy exists among the various facets of AI governance, a progressive reality

that the four-dimensional framework of this report precisely captures. First, AI governance must be grounded in capability; on that foundation, a country must shoulder basic responsibilities, including remaining open and ensuring trustworthiness; above capability and responsibility, it must share that capability with more countries so that AI empowers the whole world, which is where the value of inclusiveness comes to the fore. Ultimately, the expansion of AI is poised to accelerate resource consumption, exacerbate social frictions, and disrupt economies, elevating sustainability to a paramount concern. Capability, responsibility, inclusiveness, and sustainability form a progressively ascending governance ladder, an incremental logic that this report heavily emphasizes.

Rooted in these two ideas, balance and a graduated structure, the report constructs an AI governance index giving equal weight to capability, responsibility, inclusiveness, and sustainability, systematically measuring 40 representative economies against 37 Tier-3 indicators. Drawing on the results, the report delineates the overarching landscape of global AI governance and, on that basis, offers an in-depth interpretation of China's approach to AI governance as revealed by the data.

II. Index Structure and Data Sources

The AI governance index comprises four Tier-1 dimensions, namely capability, responsibility, inclusiveness, and sustainability, which are divided into eleven Tier-2 indicators and further into 37 Tier-3 indicators. Each Tier-1 dimension carries one quarter of the total score, utilizing an equal-weight aggregation methodology at each tier. The design of this framework itself embodies a view of AI governance: a country's level of AI governance cannot be judged by technological capability alone, but must also be evaluated by the responsibility of its governance, the inclusiveness of its development, and the sustainability of its prospects.

(i) The Four-Dimensional Framework and Its Resonance with Chinese Ideas

The four-dimensional framework aligns closely with the vision of global AI governance that China advocates. The capability dimension measures the development of the three elements of computing power, algorithms, and data, corresponding to the material foundation of AI development. The responsibility dimension measures open collaboration and trustworthiness in governance, echoing China's emphasis on balancing development and security. The inclusiveness dimension measures whether the dividends of AI

reach disadvantaged groups, multilingual populations, and the Global South, giving direct expression to the ideas of AI for good and shared, inclusive benefit that China champions. The sustainability dimension measures the environmental, economic, and social sustainability of development, consistent with the green and coordinated development that China promotes.

By contrast, the AI assessment tools already in use internationally tend to weight technological and economic capability, paying relatively little attention to inclusiveness and sustainability. This emphasis partially reflects the perspective of developed countries. Advantaged in technology, these nations naturally lean toward a capability-centered hierarchy. Yet for the Global South, which accounts for the overwhelming majority of the world's population, the more pressing concerns center on the inclusivity, accessibility, and equitable sharing of AI's dividends. By raising the inclusiveness dimension to achieve parity with capability, the index seeks to move beyond a capability-centered view and build a framework friendlier to the South and more attentive to global fairness. In this sense, the very design of the framework contains a more

inclusive conception of global governance.

The establishment of the inclusiveness dimension deserves particular mention. When AI capability is concentrated in a few countries, whether the technological dividend can be broadly shared is becoming the definitive litmus test for the efficacy of governance. China has consistently served as a pivotal driver of international cooperation on AI capacity building, ensuring that nations across the Global South can access, afford, and effectively utilize these technologies. The global prominence of DeepSeek, for example, reflects how a Chinese technological breakthrough has, to some extent, offered the Global South as a whole an opening toward greater equality of capability. By incorporating the supply of open-weight models, the multilingual capability of models, and digital-infrastructure assistance to the South into the inclusiveness dimension, the index gives this idea a quantifiable observational basis. The four-dimensional framework is thus not merely an assessment tool but a concrete rendering of an open, inclusive, and broadly beneficial vision of AI development.

(ii) Indicator System and Data Sources

Within the capability dimension, computing power is measured by the number of supercomputers, the number of colocation data centers, GPU cluster computing power, and public-cloud region coverage in the Global South; algorithms by open-source algorithm contribution, foundation-model contribution, AI publication output, and the number of frontier AI models; and data by total data volume, the number of IoT connections, and coverage of AI data-governance policies.

Within the responsibility dimension, openness is measured by participation in international AI governance standards, principles and initiatives, along with leadership in multilateral initiatives for the Global South, and AI papers co-authored with the Global South; and trustworthiness by the number of AI incidents, the development of AI governance tools, and the maturity of government AI governance.

Within the inclusiveness dimension,

inclusion is measured by gender balance among researchers, the inclusion of disadvantaged groups in AI use, and the number of languages supported by flagship models; accessibility by the supply of open-weight models, license openness, the multilingual capability of mainstream models, and the affordability of deployment; and assistance by the scale of financing to the South, the degree to which such aid is untied, and the fulfillment rate of inclusive-benefit commitments.

Within the sustainability dimension, the environmental pillar is measured by installed renewable energy capacity, low-carbon energy support level for AI data centers, and the development of green computing power; the economic pillar by AI investment, the number of AI patents, and the strength of policies for AI-empowered SMEs and industrial innovation; and the social pillar by the size of the AI-skilled population, public trust in AI, and the number of AI training programs. The full structure is presented in Table 1.

Table 1. Indicator System of the AI Governance Index

Tier-1	Tier-2	Tier-3 Indicator	Data Source	Calculation Method
Capability	Computing Power	Number of supercomputers	TOP500 list	Count of ranked systems; Min-Max normalization
		Number of colocation data centers	Data Center Map	Count of data centers; Min-Max
		GPU cluster computing power	Epoch AI GPU Clusters	Aggregate cluster compute; log-transformed, then Min-Max
		Public-cloud region coverage in the Global South	Cloud providers' official region pages	Global South countries covered by each nation's cloud providers; log-transformed, then Min-Max
	Algorithms	Open-source algorithm contribution	OECD.AI	Open-source contribution index; Min-Max
		Foundation-model contribution	Stanford CRFM	Number and influence of foundation models; Min-Max
		AI publication output	OpenAlex	Count of AI-related papers; log-transformed, then Min-Max
		Number of frontier AI models	Epoch AI Notable Models	Count of notable models; log-transformed, then Min-Max
	Data	Total data volume	IDC Global DataSphere	Regional values with proxy variables; log-transformed, then Min-Max
		Number of IoT connections	IoT Analytics / GSMA	Regional values with an industrialization proxy; log-transformed, then Min-Max
Coverage of AI data-governance policies		OECD.AI Policy Navigator	Policy-item coverage; Min-Max	
Responsibility	Openness	Participation in international AI governance standards	ISO/IEC JTC 1/SC 42	Count of standards participation; Min-Max
		Participation in international AI governance principles and initiatives	G20/OECD/UNESCO/GPAI rosters	Count of participation; Min-Max
		Leadership in multilateral initiatives for the Global South	UN resolution database; initiative texts	Led multilateral initiatives on Global South AI capacity-building; log-transformed, then Min-Max
		AI papers co-authored with the Global South	OpenAlex API	AI papers co-authored with Global South countries; log-transformed, then Min-Max
	Trustworthiness	Number of AI incidents	OECD.AI	Incident count; reverse-coded and log-transformed, then Min-Max
		Development of AI governance tools	AI Index Report 2025	Governance-tools index; Min-Max
		Maturity of government AI governance	Oxford Insights Government AI Readiness Index 2025	Governance-pillar score; Min-Max

Tier-1	Tier-2	Tier-3 Indicator	Data Source	Calculation Method
Inclusiveness	Inclusion	Gender balance among researchers	AI Index Report 2025	Share of female researchers; Min-Max
		Inclusion of disadvantaged groups in AI use	OECD Going Digital	Inclusion index; Min-Max
		Languages supported by flagship models	Technical documentation of national flagship models	Count of supported languages; log-transformed, then Min-Max
	Accessibility	Supply of open-weight models	Epoch AI Notable Models	Count of open-weight models; log-transformed, then Min-Max
		License openness	Epoch AI (model accessibility)	License-openness score; Min-Max
		Multilingual capability of mainstream models	HuggingFace Models API	Multilingual-support score; log-transformed, then Min-Max
		Affordability of deployment	OpenRouter Models API	Reciprocal of unit inference cost; Min-Max
	Assistance	the scale of digital infrastructure financing for the South	OECD CRS+AidData GCDF	Communications/digital-infrastructure financing to the Global South; log-transformed, then Min-Max
		Degree to which Global South aid is untied	OECD DAC	Share of untied aid to the Global South; Min-Max
		Fulfillment rate of inclusive-benefit commitments	OECD CRS	Disbursement ratio of committed funds; Min-Max
Sustainability	Environment	Renewable Energy Installed Capacity	IRENA renewable-capacity statistics	Installed capacity (GW); log-transformed, then Min-Max
		low-carbon energy support level for AI data centers	OWID/Ember; IEA	Share of low-carbon energy; Min-Max
		Development of green computing power	Green500 list	Energy-efficiency index; Min-Max
	Economy	AI investment	AI Index Report 2025	Share of GDP with absolute GDP; log-transformed, then Min-Max
		Number of AI patents	OECD SDMX patent database	Patent count; Min-Max
		Strength of policies for AI-empowered SMEs and industrial innovation	OECD.AI Policy Navigator	Policy-strength score; Min-Max
	Society	Size of the AI-skilled population	KPMG & University of Melbourne 2025 report	AI adoption rate with absolute population; log-transformed, then Min-Max
		Public trust in AI	Ipsos 2025 AI Monitor	Composite score across eight public attitudes toward AI; Min-Max
		Number of AI training programs	Public statistics on national AI training programs	Program count; log-transformed, then Min-Max

On data sources, the index draws widely on authoritative public data, including benchmark AI databases such as Epoch AI, OpenAlex, and OECD. The data collection cutoff was May 2026. It should be noted that some country-level figures are estimated rather than measured country by country; the size of the AI-skilled population and AI investment, for instance, are derived from the corresponding ratios together with population and economic size. For missing values arising for various reasons, the index fills them uniformly by k-nearest neighbors (KNN) imputation, so as not to mistake unrecorded data for zeros.

(iii) Data Normalization Method

The index aggregates Tier-3 indicators into a final composite score through layer-by-layer equal-weight aggregation, whose core principle is that, at every level, each lower-level indicator contributes exactly the same weight to the higher-level indicator to which it belongs. The aggregation proceeds bottom-up in three steps.

First, Tier-3 indicators are combined into Tier-2 indicators. Before aggregation, all Tier-3 indicators are made dimensionless: right-skewed indicators

are first log-transformed to compress differences in scale; negative indicators (such as the number of AI incidents) are first reversed so that they run in the same direction as positive ones; and all are then rescaled to between 0 and 1 by Min-Max normalization (and multiplied by 100 to yield scores on a 100-point scale). Each Tier-2 indicator’s score is then the simple arithmetic mean of the normalized scores of all its Tier-3 indicators. Take computing power: it comprises the four Tier-3 indicators of number of supercomputers, number of colocation data centers, GPU cluster computing power, and public-cloud region coverage, so its score is the sum of those four normalized scores, each assigned a weight of one-quarter. Likewise, a Tier-2 indicator with three sub-indicators (such as data or trustworthiness) gives each Tier-3 indicator a weight of one third. In other words, however many Tier-3 indicators fall under a given Tier-2 indicator, each shares its full weight equally, with no bias introduced by the number of indicators or the source of the data.

Second, Tier-2 indicators are combined into Tier-1 indicators. As in the first step, each Tier-1 dimension’s score is the simple arithmetic mean of all its Tier-

2 indicators. The capability dimension, for example, comprises the three Tier-2 indicators of computing power, algorithms, and data, so its score weights each one third; the responsibility dimension comprises openness and trustworthiness, each weighted one half; the inclusiveness dimension comprises inclusion, accessibility, and assistance, and the sustainability dimension comprises environment, economy, and society, each averaged with equal weight in the same way.

Third, Tier-1 indicators are combined into the composite score. Capability, responsibility, inclusiveness, and sustainability each account for one quarter of the composite score; that is, the composite score is the simple arithmetic mean of the four Tier-1-dimension scores.

One point deserves special emphasis: the “equal weight” in “layer-by-layer equal weight” refers to equal weights among the lower-level indicators under the same higher-level indicator, not to equal weights for all Tier-3 indicators in the final composite score. Because the number of

Tier-3 indicators under each Tier-2 indicator differs, as does the number of Tier-2 indicators under each Tier-1 dimension, the implicit weight of a given Tier-3 indicator in the composite score varies after successive averaging. For instance, “openness” and “trustworthiness” each account for one-half of the responsibility dimension. However, “openness” comprises four Tier-3 indicators while “trustworthiness” comprises three, each Tier-3 indicator under “openness” therefore carries an implicit weight of one-eighth ($1/2 \times 1/4$) within the responsibility dimension, whereas each under “trustworthiness” carries one-sixth ($1/2 \times 1/3$). This design ensures that every Tier-2 indicator (a specific facet of governance) and every Tier-1 dimension (a basic pillar of governance) is balanced in its representation, avoiding the effective over-weighting of any facet simply because it is split into many sub-items. The index thus faithfully reflects its core design philosophies: “equal emphasis on the four dimensions of capability, responsibility, inclusiveness, and sustainability” and “layer-by-layer progression up the governance ladder”.

III. Findings

This section presents, mainly through charts, the results of the AI Governance Index for 40 economies worldwide. Following the structure of the index itself, it unfolds hierarchically, from the composite score to the four Tier-1 dimensions and then to specific Tier-2 and Tier-3 indicators, portraying the overall landscape of global AI governance, the distribution of tiers,

and the distinctive features of individual countries. After each section, we briefly note China’s position and characteristics on the relevant dimension, sketching the contours of China’s approach through subtle yet revealing details. Unless otherwise noted, the scores in the charts represent relative scores normalized and scaled to a 100-point system.

(ii) The Global Landscape: A Distinctly Tiered Picture

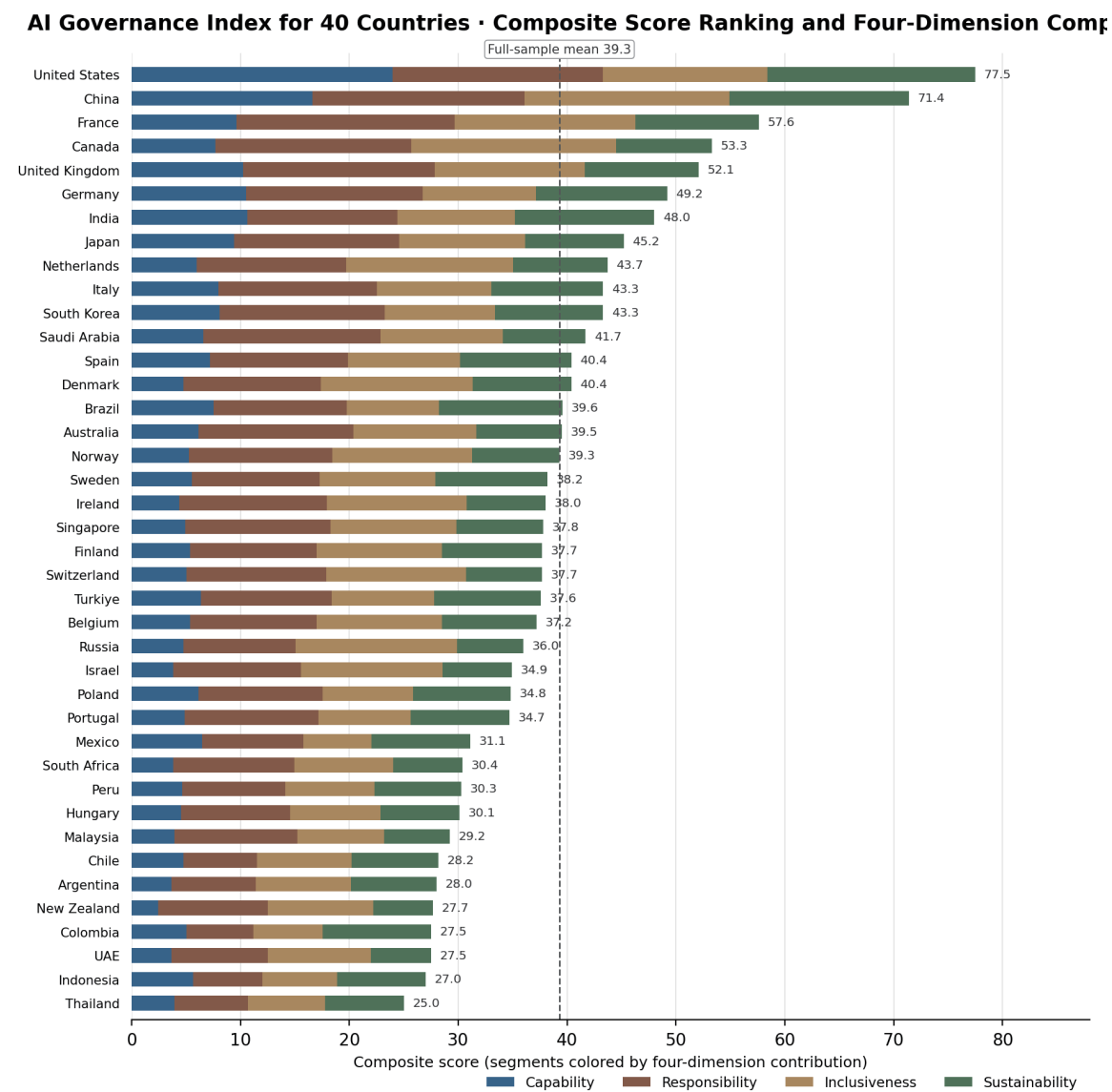


Figure 1. Composite Score Rankings and Four-Dimensional Composition of 40 Economies

The composite score results reveal a distinctly tiered landscape of global AI governance. The United States ranks first with 77.5, its lead driven mainly by its advantage on the capability dimension (the blue segment), while China ranks second with 71.4. These two countries constitute the leading group. They are followed by a cluster of economies including France (57.6), Canada (53.3), the United Kingdom (52.1), Germany (49.2), India (48.0), and Japan (45.2), whose scores concentrate between 45 and 58 and may be regarded as the second group. Most other countries

fall below 45, and the full-sample mean is 39.3. Each country's bar is segmented by the contribution of the four dimensions, making the differences in composition clear: the United States' capability segment stands out alone, European countries' responsibility segments (ocher) are relatively prominent, and most countries' sustainability segments (green) are comparatively weak.

Notably, rankings do not fully correlate with economic size. Mid-sized economies such as Canada, the Netherlands, and the Nordic countries rank well above the positions their economic scale would imply, on the strength of their performance in governance quality and inclusive practices. Conversely some populous, large-

economy countries rank lower because of shortcomings in capability or governance. This demonstrates that the level of AI governance is a composite capability independent of economic size; each economy's competitiveness is underpinned by governance quality, degree of openness, and willingness to share dividends.

Within this landscape China performs strongly, ranking second with 71.4 and anchoring the leading group alongside the United States. Its bar exhibits a relatively balanced distribution across the four dimensions, with no dimension conspicuously lacking. This baseline balance is a defining characteristic of China's approach, to which the following analysis returns repeatedly.

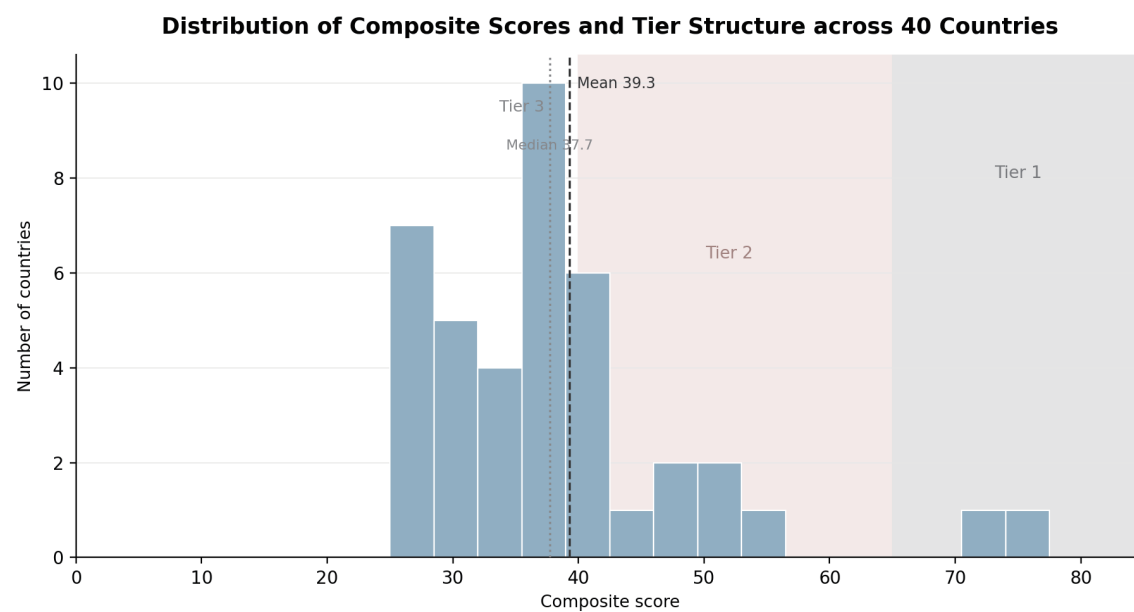


Figure 2. Composite Score Distribution and Tier Structure Across 40 Economies

The statistical distribution of the composite scores shows a markedly right-skewed pattern with a clear gap. The full-sample mean is 39.3 and the median is about 37.7, with most countries clustered between 30 and 45, while the two top-ranked countries score above 70, detached from the main distribution and forming a distinct bimodal pattern. This shape carries two implications: first, the highest level of AI governance is concentrated in a very few countries, separated by a clear gap from the second group; second, the second group is densely packed, so that

small changes in rank often hinge on trade-offs within individual dimensions, which gives countries a real incentive for policy effort.

The two countries at the top of the distribution are the United States and China. That China reaches this discontinuous leading position means it is not only the front-runner among Global South countries, but also one of the few economies worldwide to attain a top level of governance.

(ii) The Four Dimensions: Global Distribution and Portraits of China and the US

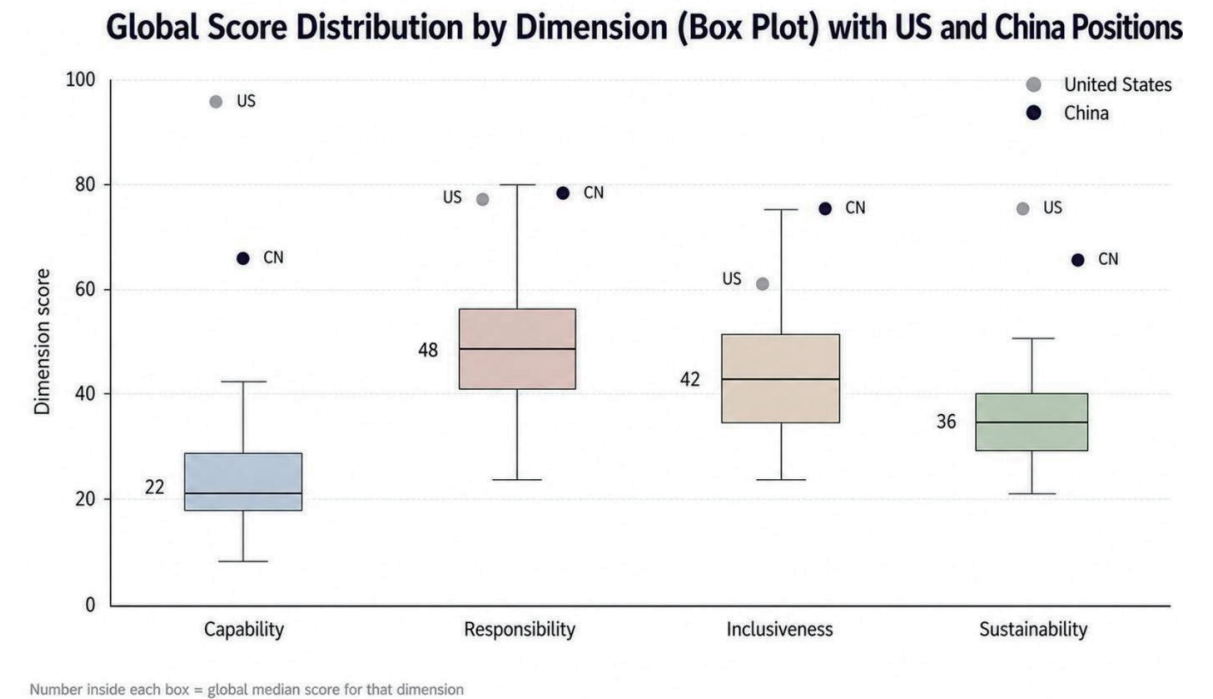


Figure 3. Score Distribution and Major-Power Positions Across the Four Dimensions for 40 Economies

The four Tier-1 dimensions capture different facets of governance, and countries' performance across them differs significantly. The box plots above show the distribution of the 40 economies on each dimension: the capability dimension has the longest box and the greatest dispersion, and the lowest overall median (about 22), indicating that capability is the most sharply divided dimension globally, with a few countries leading by a wide margin while the vast majority lag behind. By contrast,

the responsibility dimension has the highest median (about 47) and a relatively concentrated distribution, suggesting that responsible governance is becoming a fairly common pursuit worldwide. The inclusiveness and sustainability dimensions fall in between.

The figure also marks the positions of China and the United States on each dimension. On capability, both are outliers far from the main body, opening a wide

gap over the rest; on inclusiveness, China sits above the United States, at the top of the distribution. This reveals a fact that rankings alone cannot convey: the degree of balance in global AI governance varies

by dimension, and China's position, which is top-tier on capability and leading the world on inclusiveness, embodies its balanced development across all four dimensions.

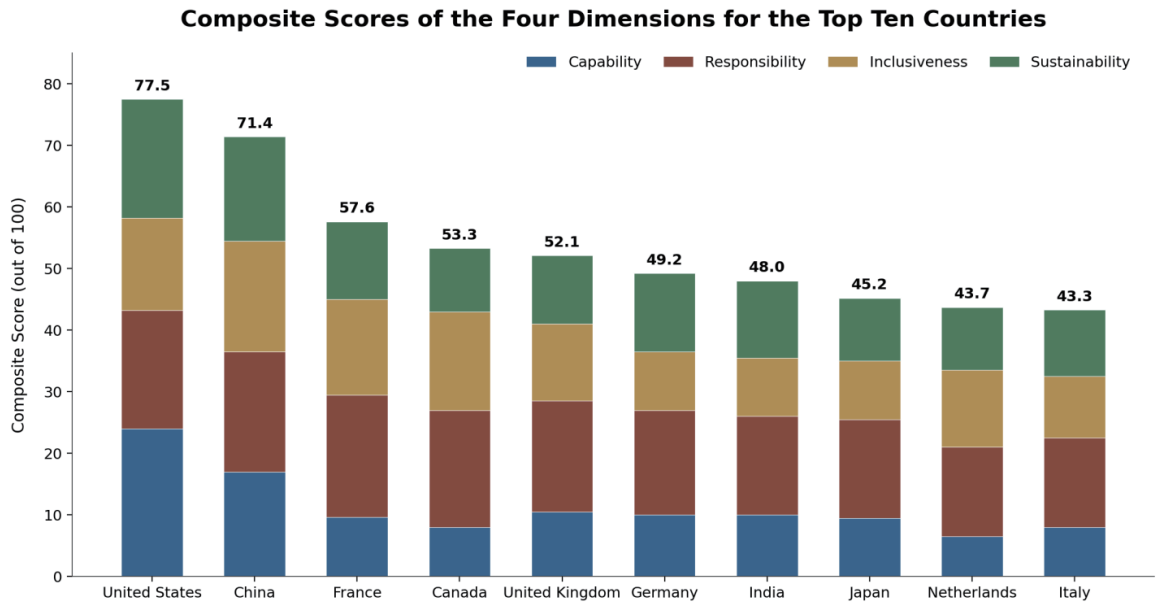


Figure 4. Four-Dimension Score Composition Across the Top Ten Economies

Placing the four-dimensional composition of the top ten economies side by side makes the multipolar pattern clearer. The United States' score depends heavily on the blue pillar of capability; European countries such as France, the United Kingdom, and Germany have relatively thick responsibility segments (ocher); and Canada's inclusiveness

segment (khaki) is quite prominent. Each country's strong dimension differs, together forming the plural character of global AI governance. Among these ten, China's four colors are the most evenly distributed, making it one of the few countries that succeed not by a single dimension but by coordination across all four.

(iii) A Closer Look: Capability and Responsibility

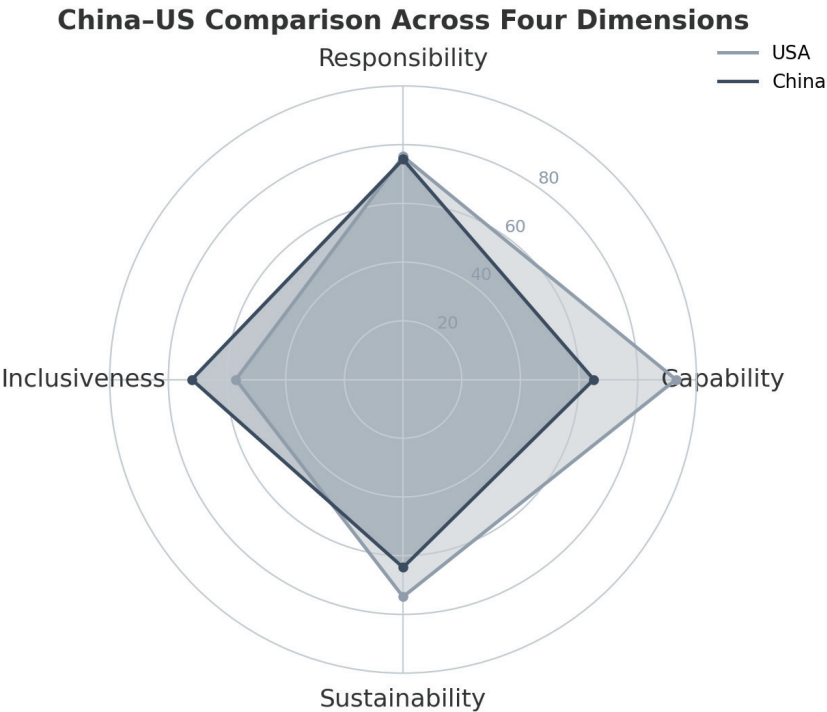


Figure 5. China-US Structural Comparison Across the Four Dimensions

The radar comparison of China and the United States across the four dimensions vividly presents two structural profiles. The United States' outline stretches to an extreme on capability (95.9) yet pulls in noticeably on inclusiveness (60.4); China's outline is relatively even across all four directions and exceeds the United States on both responsibility

and inclusiveness. The contrast confirms once more that countries with similar or leading composite scores may have utterly different internal structures. A lead in capability and balance across dimensions are two different forms of advantage. For China, this even, inclusiveness-forward structure is the most distinctive mark of its approach.

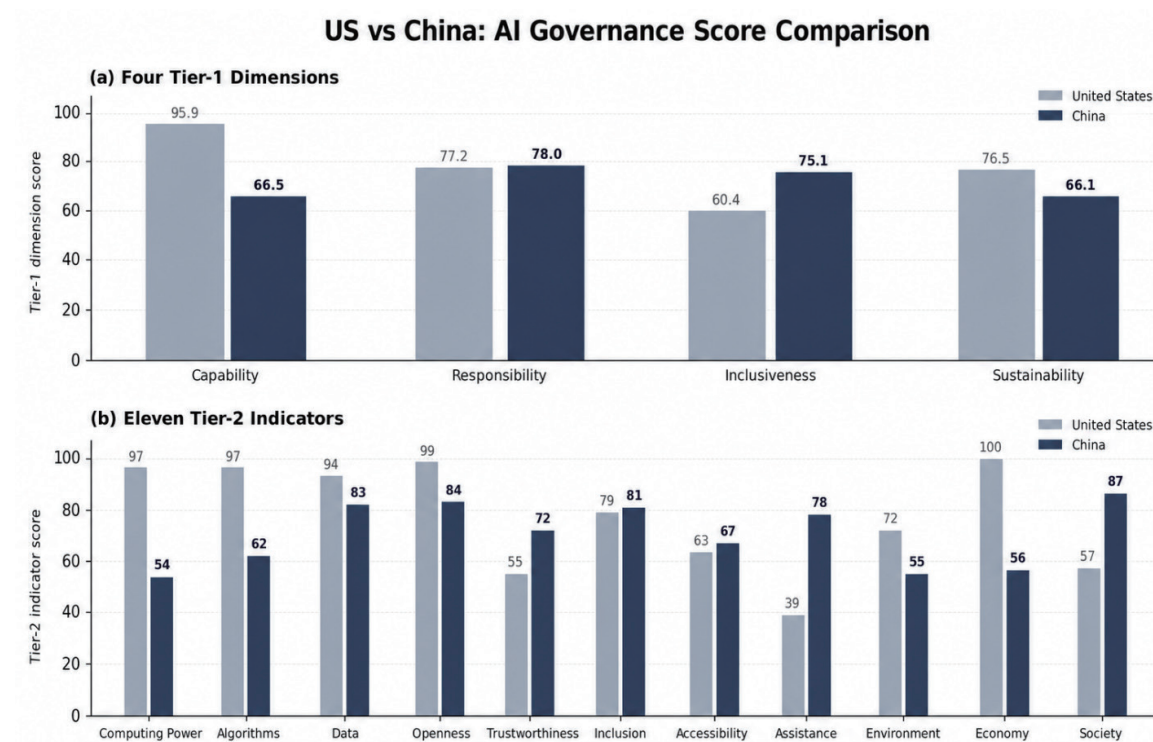


Figure 6. China-US Comparison of AI Governance Scores Across Two Levels

As the two economies with the highest composite scores, China and the United States offer two typical yet contrasting portraits, compared in the figure above at the level of Tier-1 dimensions (a) and Tier-2 indicators (b). At Tier-1, the United States reaches 95.9 on capability, ranking first globally, but only 60.4 on inclusiveness; China is relatively balanced across the four, with a prominent 75.1 on inclusiveness and 78.0 on responsibility. At Tier-2, the United States leads by a wide margin on hard-power indicators such as computing power, algorithms, data, openness, and economy (mostly above 94), while

China ranks higher in indicators focused on governance and inclusiveness, such as trustworthiness, inclusion, assistance, and society. The contrast clearly reveals two paths of AI development: the United States leads on the strength of absolute technological and capital advantages, a capability-driven structure; China stands out for balance across dimensions and the sharing of dividends, a balanced and coordinated structure. Each path has its own emphasis, and neither is unambiguously superior, but the balanced, inclusive orientation that China represents is the hallmark of its approach.

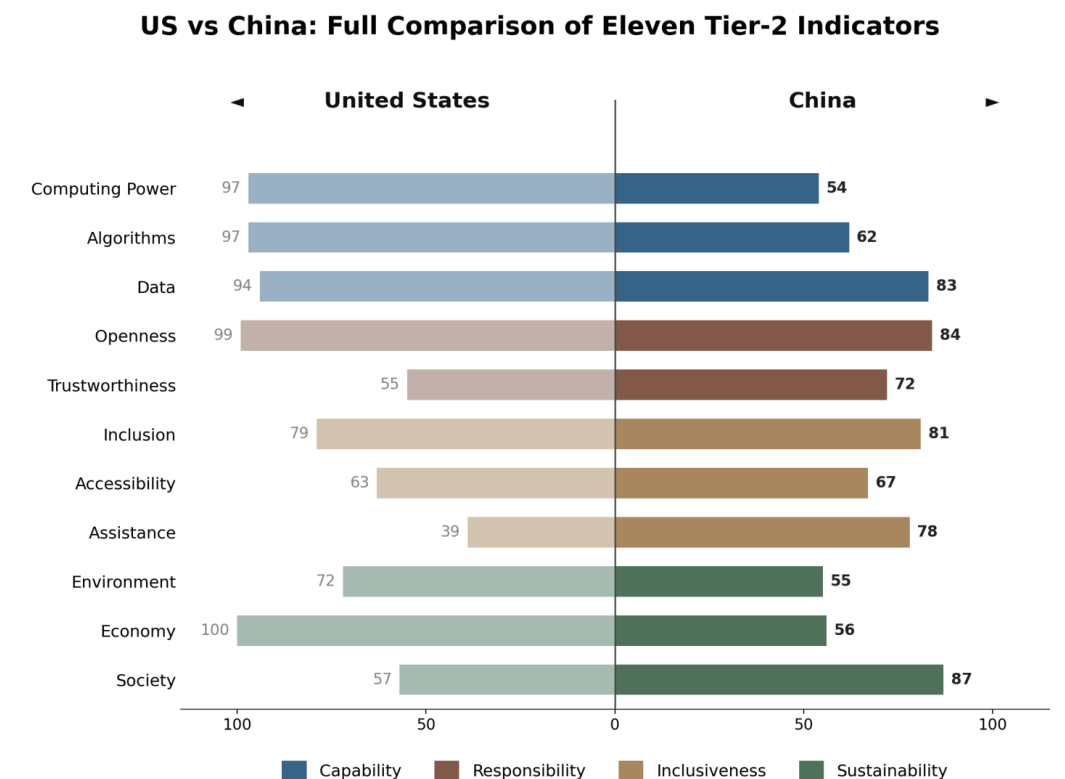


Figure 7. Item-by-Item Comparison Across All Eleven Tier-2 Indicators for China and the US

Comparing China and the United States item by item across the eleven Tier-2 indicators shows how their advantages are distributed. The United States leads by a wide margin on hard-power indicators such as computing power, algorithms, and economy (mostly above 94); on indicators such as trustworthiness, inclusion, assistance, and society, other countries

rank higher. Even the two countries with the highest composite scores do not overlap in their areas of strength but each have their own emphasis. China performs strongly on indicators focused on governance and inclusivity such as trustworthiness, inclusion, assistance, and society, complementing the hard-power-oriented advantage structure of the United States.

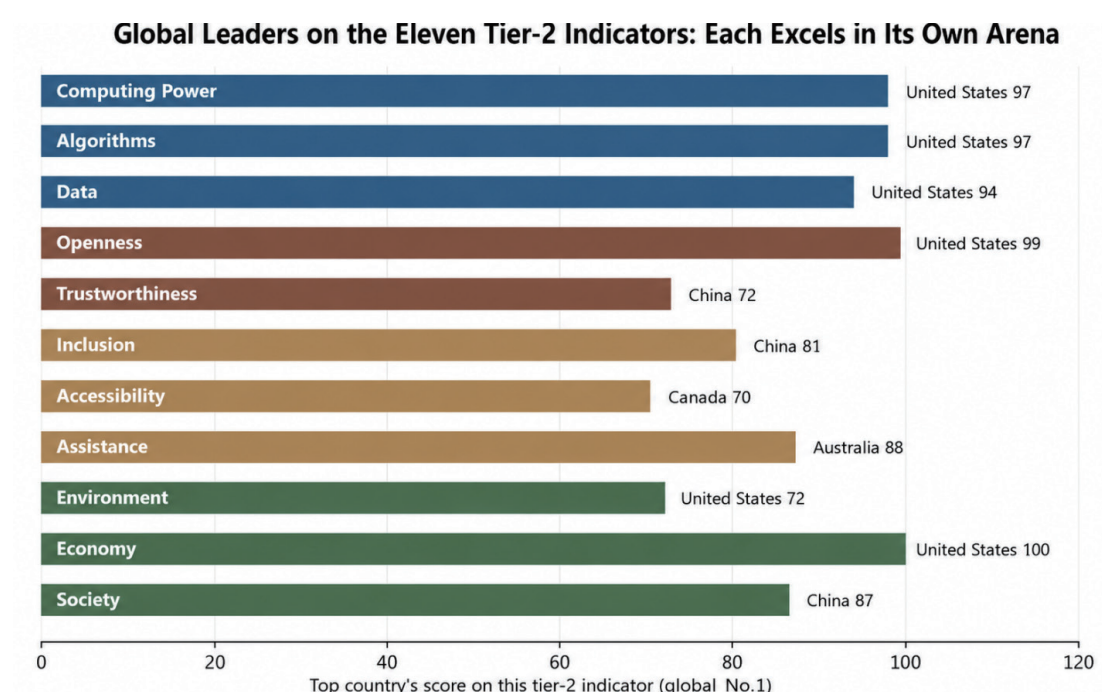


Figure 8. Global Leaders Across the Eleven Tier-2 Indicators

Global AI governance is in fact a plural picture in which different players excel in different arenas, not the solo act of any single country. Across the eleven Tier-2 indicators, the top spot is claimed by four different countries: the United States leads on six, namely computing power, algorithms, data, openness, environment, and economy, reflecting its all-round hard power and institutional advantages; China ranks first on three, namely trustworthiness, inclusion, and society, reflecting its strengths in reliable

governance, inclusive dividends, and social acceptance; Canada leads on accessibility, its open-source and multilingual practice earning widespread recognition; and Australia tops assistance, noted for high-quality external cooperation. Although the United States and China lead on a larger number of Tier-2 indicators, the world's areas of advantage remain dispersed, with different countries excelling in different fields, and progress in global AI governance depends on the joint contribution of plural actors.

(iv) Leadership Across Four Dimensions: China's Multidimensional Position

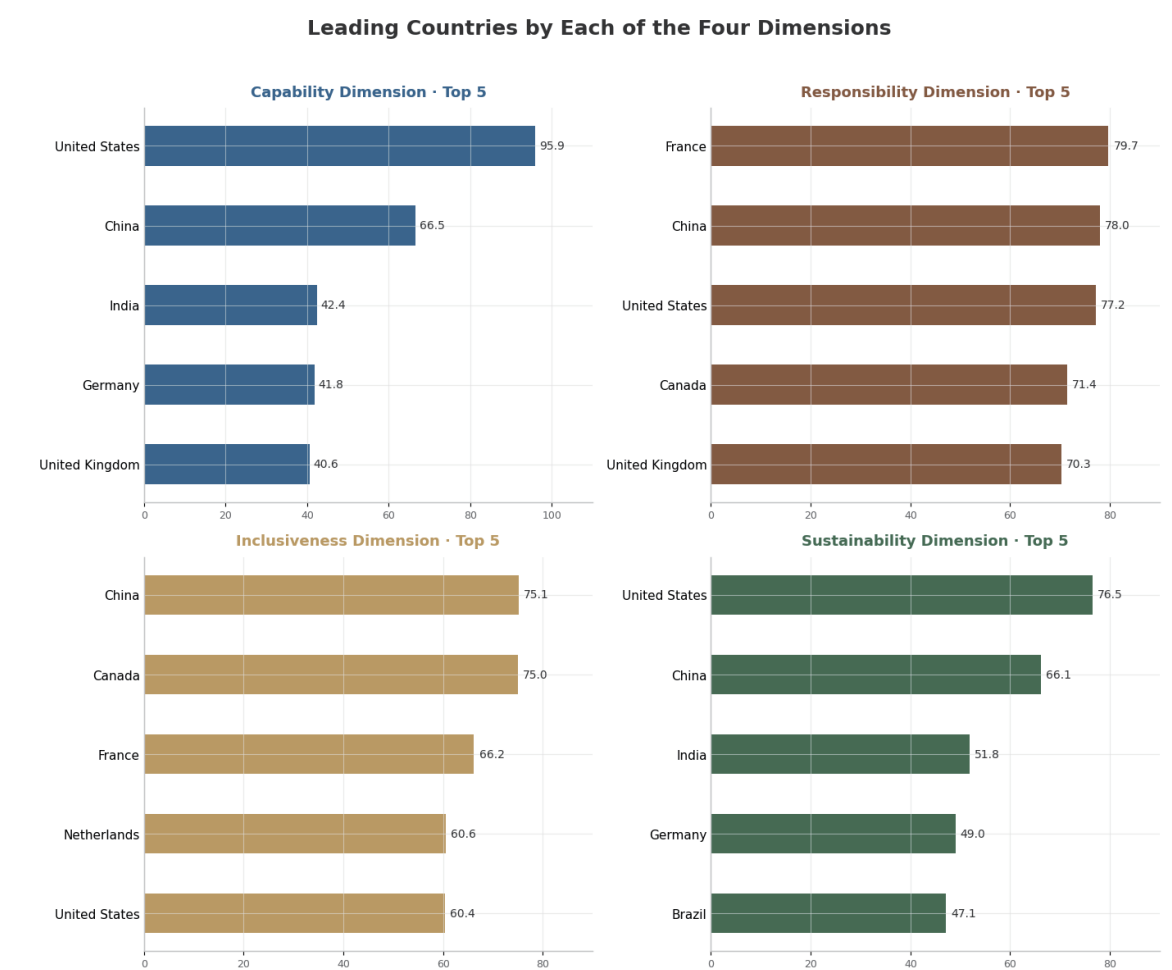


Figure 9. Leading Countries by Each of the Four Dimensions

Examining the leading countries in each dimension individually, the multipolar landscape becomes immediately apparent. In the Capability dimension, the United States leads by a wide margin. In the Responsibility dimension, France, the United States, and others are neck and neck, with European countries collectively performing strongly thanks to their mature governance traditions. In the Inclusiveness dimension, China and Canada are the frontrunners. In the

Sustainability dimension, the United States and China rank at the top. As can be seen, the top spot in each of the four dimensions belongs to a different country: the United States excels in Capability and Sustainability, European and Commonwealth countries excel in Responsibility, and Inclusiveness is the strong suit of China and Canada. China's distinguishing feature is that it is one of the few countries to rank near the top in every dimension without any obvious weakness.

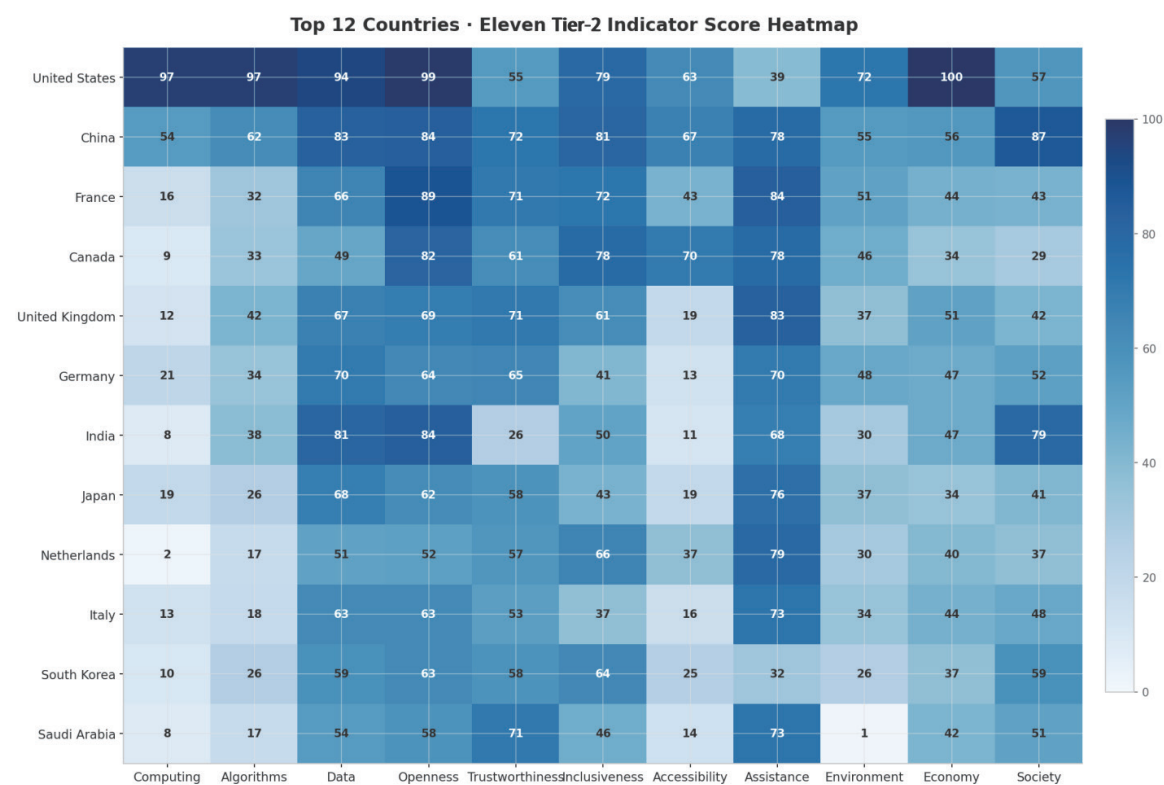


Figure 10. Top 12 Countries x Eleven Tier-2 Indicator Score Heatmap

The heatmap of eleven secondary indicators for the top twelve countries presents the distribution of strengths and weaknesses across these nations. The depth of color intuitively reflects the score level: the United States shows the deepest colors in Computing Power, Algorithms, Data, Openness, and Economy; European countries show deeper colors in governance-related indicators; and every country tends to be dark in some

indicators and light in others, with few showing consistently deep colors across the board. This mottled distribution is a vivid portrait of the dispersed nature of global AI governance advantages. Among them, China shows deeper colors in Data, Trustworthiness, Inclusion, Assistance, and Society, with a relatively broad distribution of strengths, making it one of the few countries where most indicators are not near the bottom.

(v) Distribution of Single-Indicator Champions

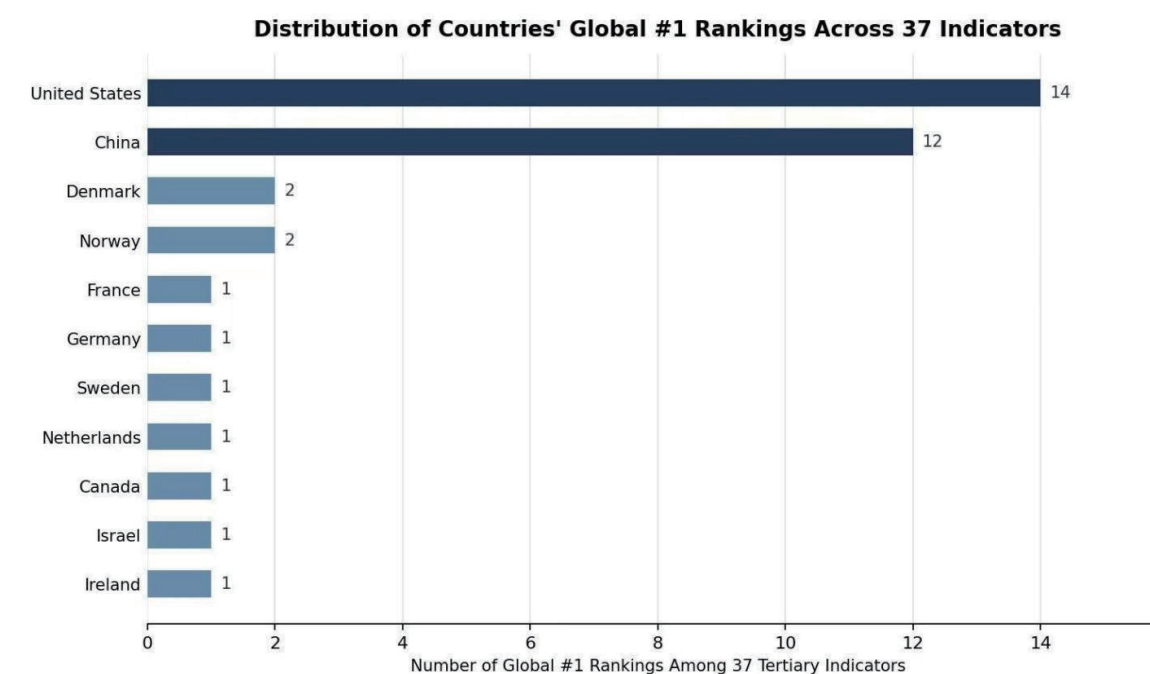


Figure 11. Distribution of Countries' Global No. 1 Rankings Across the 37 Indicators

Taking the perspective one level deeper to the thirty-seven tertiary indicators and examining which country claims the top spot in each reveals the advantage distribution in finer detail. The statistics show that the thirty-seven first places are distributed among eleven countries: the United States holds fourteen, the most of any country; China follows closely with twelve; The United States and China together hold 70% of the thirty-seven first places. Norway and Denmark each hold two; and Ireland, the Netherlands, Canada, Israel, France, Sweden, and Germany each hold one. This distribution indicates that although the

United States and China clearly lead in the number of individual championships, nearly one-third of the indicator first places still go to other countries. Numerous smaller economies are equally capable of ranking at the world forefront in their respective specialized subfields.

China's twelve first places are not concentrated in a single domain but are evenly distributed across all four dimensions: in Capability, they include Southern public cloud coverage, AI paper publications, Data scale, and IoT connections; in Responsibility, they include

leadership in Southern multilateral initiatives and AI governance tools; in Inclusiveness, they include open-weight model supply, model multilingual capability, and financing for the South;

in Sustainability, they include renewable energy, AI-skilled population, and public trust. This cross-dimensional breadth is an important pillar supporting China’s robust composite score.

(vi) Capability Dimension: Data and Algorithms

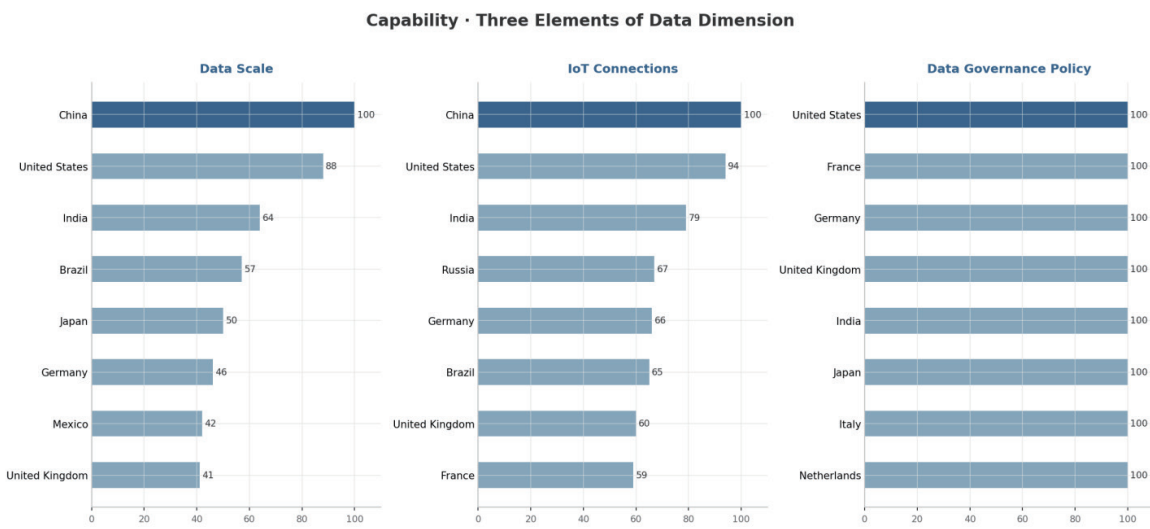


Figure 12. Capability - Three Elements of Data Dimension

The Data element of the Capability dimension is a direct reflection of each country’s digital foundation. In Data scale and IoT connections, large economies with sizable populations and active digitalization hold the advantage; in the completeness of Data governance policy, countries that established their institutional frameworks earlier lead the way. Together, these three aspects constitute

the full picture of a country’s Data endowment. For China, its Data scale and IoT connections both rank first globally, giving it the richest Data resources of the AI era. However, there remains room for improvement in the completeness of its Data governance policies. This is the distinctive feature of its Data element: leading in scale while its institutional framework still needs strengthening.

Capability - Four Elements of Algorithm Dimension

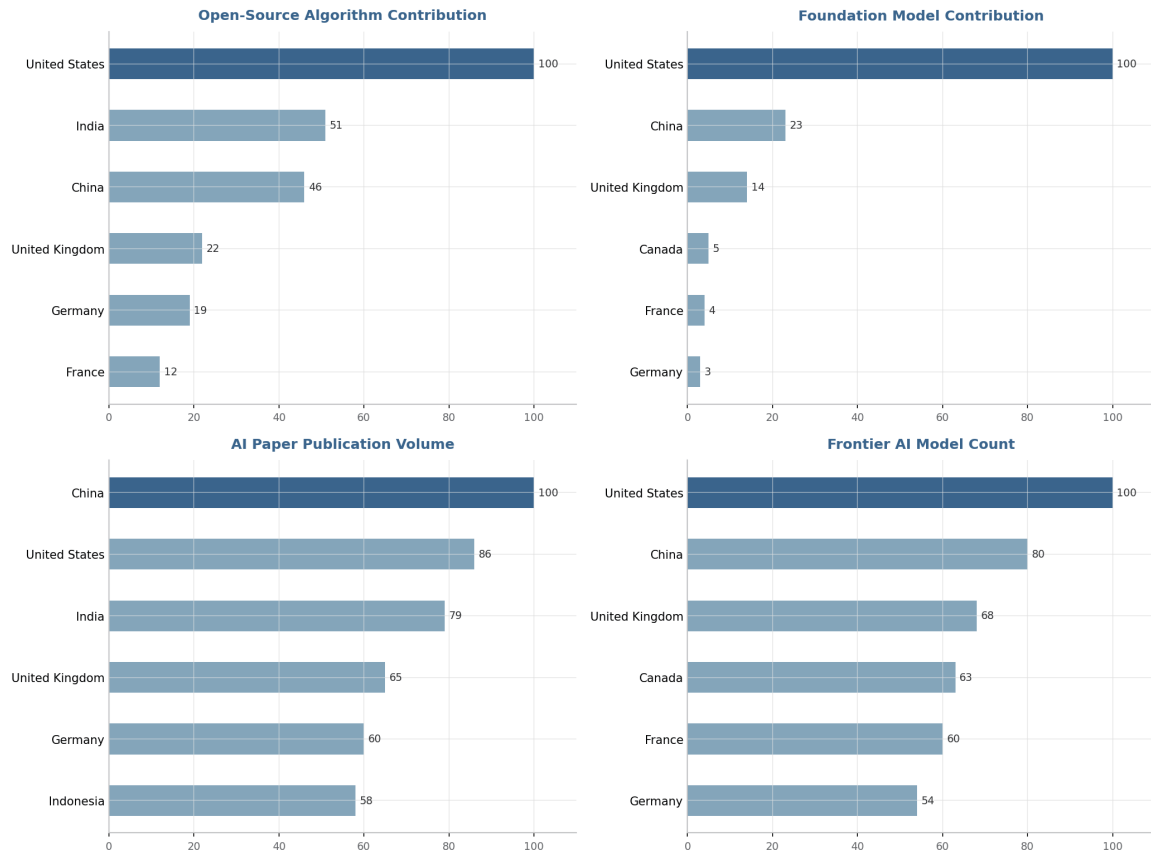


Figure 13. Capability - Four Elements of Algorithm Dimension

The four elements of the Algorithms dimension capture each country’s strength in model research and development. The United States leads in the most cutting-edge indicators such as foundation model contribution and frontier AI model count, reflecting its advantage in model paradigm innovation. In AI paper publication volume, an indicator reflecting research scale, countries with large

research communities rank higher. China ranks first globally in AI paper publication volume and second in both foundation model contribution and frontier AI model count. This indicates that while the United States still holds the edge in the most frontier model innovation, China has already become a major pole in global large model R&D, showing a trend of rapid catch-up.

(vii) Inclusiveness Dimension: Varied Strengths Across Countries

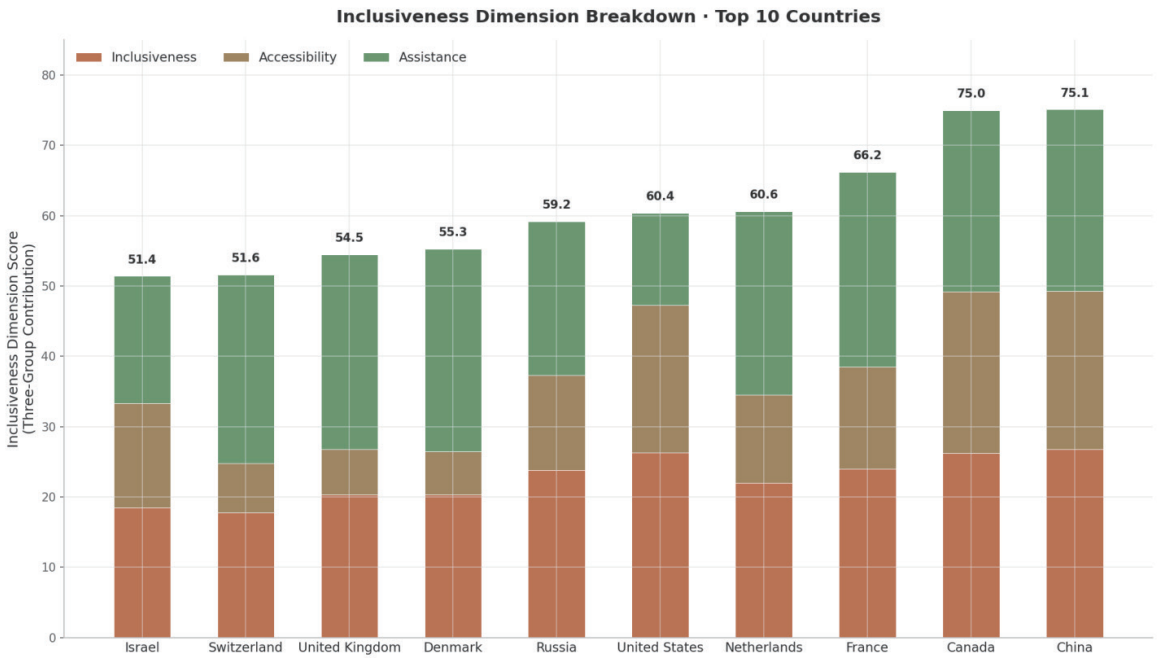


Figure 14. Inclusiveness Dimension Breakdown -Top 10 Countries

The Inclusiveness dimension measures the degree to which AI dividends are shared, comprising three groups: Inclusion, Accessibility, and Assistance. Examining the breakdown of the top ten countries reveals that different countries draw their Inclusiveness advantages from different sources: some are strong in Inclusion, some in the openness and multilingual capabilities of Accessibility, and some in the scale and quality of external Assistance. Canada, China, France, and Nordic countries rank

near the top in this dimension. Among them, China ranks first globally in the Inclusiveness dimension with a score of 75.1, and its three groups—Inclusion, Accessibility, and Assistance—are all relatively balanced. Its open-weight model supply and model multilingual capability rank first globally, and its digital infrastructure financing scale for Southern countries also leads. This leadership in the Inclusiveness dimension is the most globally significant feature of the China approach.

Accessibility Dimension Details: China-US-Canada Comparison

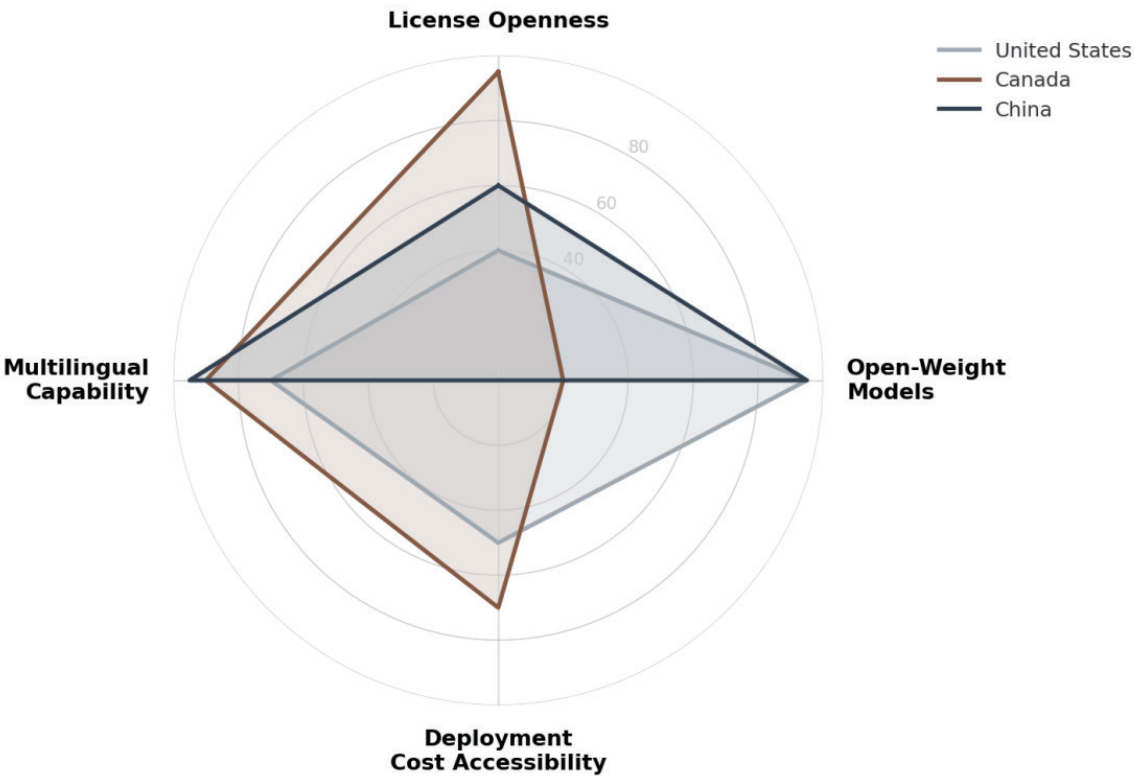


Figure 15. Accessibility Dimension Details: China-US-Canada Comparison

The Accessibility dimension measures how readily AI capability can be obtained and used. Taking China, the United States, and Canada as an example, Canada stands out in License Openness, China leads in the supply of Open-Weight Models and Multilingual Capability, while the United States lags relatively behind. This shows that lowering the barriers to accessing AI

and promoting its widespread availability is becoming a deliberate choice for an increasing number of countries, with different countries pursuing different paths. China is distinguished by its dense supply of high-quality open-source models and its leading multilingual capability, representing an important path toward technology accessibility.

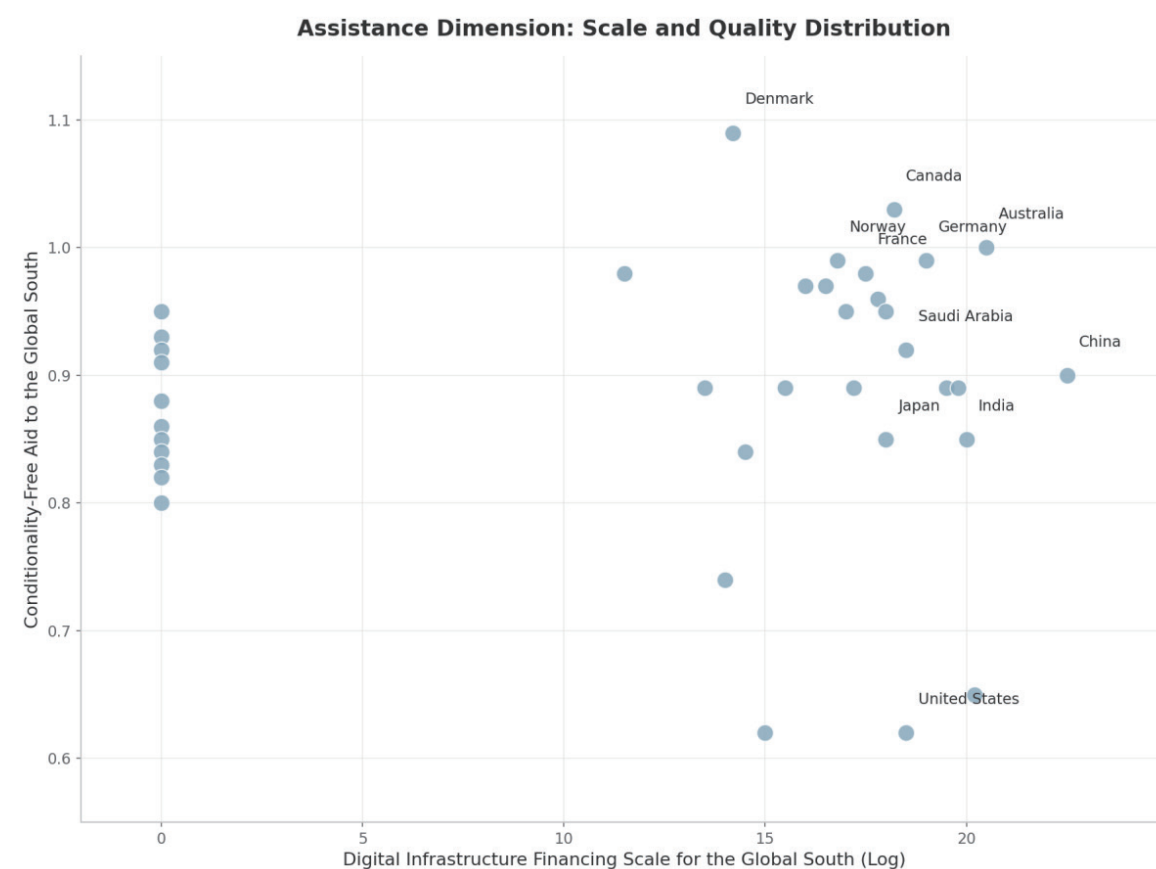


Figure 16. Assistance Dimension: Scale and Quality Distribution

The Assistance dimension can be examined from the perspectives of scale and quality. In the figure above, the horizontal axis represents the scale of digital infrastructure financing for the South, and the vertical axis represents the conditionality-free degree of assistance to the South. Countries are scattered across the plot: some have large financing scales, some are distinguished by high conditionality-free degrees, and relatively few excel in

both. This reflects the diverse landscape of global AI and digital development assistance. Among them, China is located at the far right of the horizontal axis, not only ranks first globally in financing scale but is also known for attaching no political conditions to its cooperation. This large-scale, conditionality-free assistance is a distinctive feature of China's participation in digital development cooperation with the Global South.

(viii) Responsibility Dimension: Responsible Governance

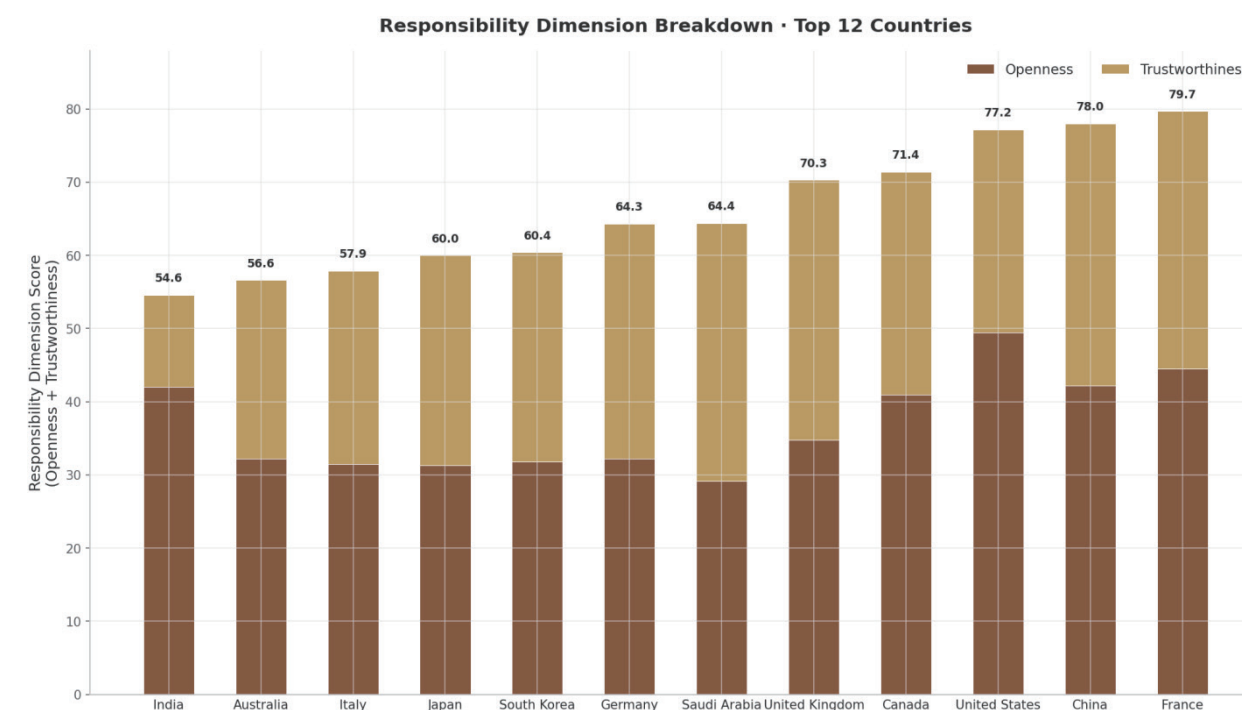


Figure 17. Responsibility Dimension Breakdown -Top 12 Countries

The Responsibility dimension comprises two groups—Openness and Trustworthiness—and is a traditional strength of European countries. Examining the breakdown of the top twelve countries, France ranks first globally in the Responsibility dimension with a score of 79.7, followed closely by China (78.0) and the United States (77.2), with the United Kingdom, Canada, and Germany also ranking among the top. European countries have long been active participants in

international governance standards and initiatives and possess deep-rooted rule-of-law traditions, giving them a collective advantage in the Responsibility dimension. China also performs outstandingly in this dimension, ranking among the top three globally. Its strength derives from its leading participation in Southern multilateral initiatives and its institutional practice as one of the earliest countries in the world to implement dedicated governance for generative AI.

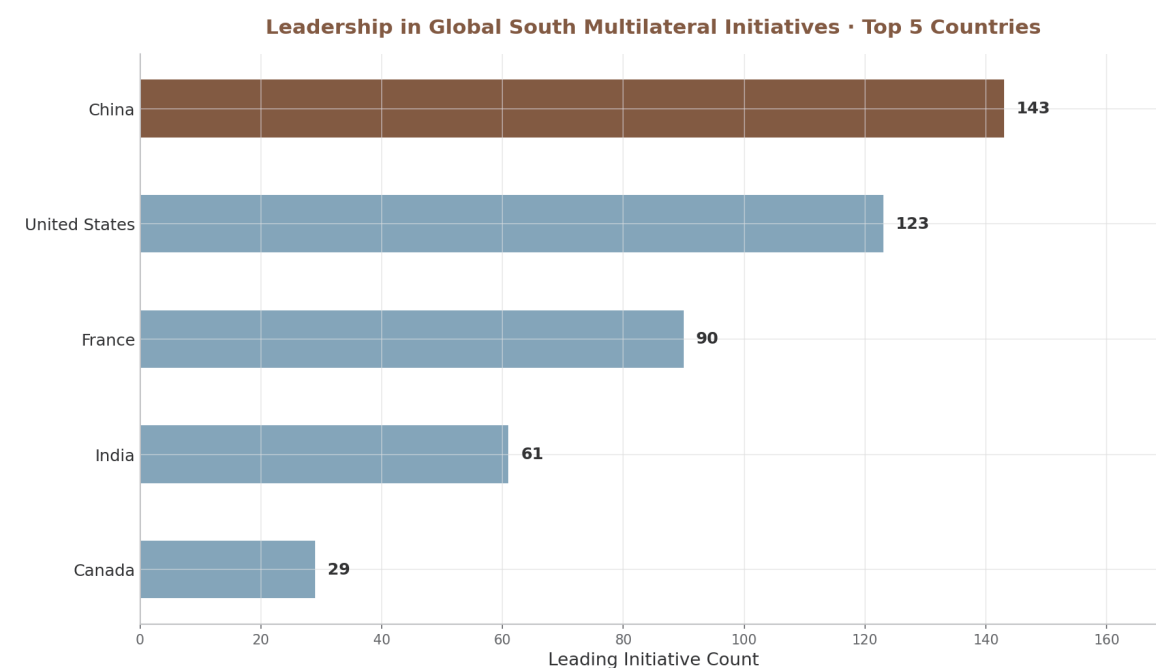


Figure 18. Leadership in Global South Multilateral Initiatives - Top 5 Countries

Leadership in Global South multilateral initiatives measures a country's agency in shaping global AI governance rules. On this indicator, countries that actively initiate international initiatives oriented toward the South, build capacity-building cooperation platforms, and drive relevant multilateral processes rank at the forefront. The multilateral process of Southern AI governance is jointly advanced by multiple parties: the United

States, France, and others are deeply involved through initiating international initiatives and participating in multilateral governance processes. China ranks first globally on this indicator, reflecting its increasingly proactive role on the global AI governance stage oriented toward the Global South in recent years—from proposing the Global AI Governance Initiative to promoting capacity-building cooperation for the South under the UN framework.

(ix) Sustainability Dimension: Green and Social Foundations

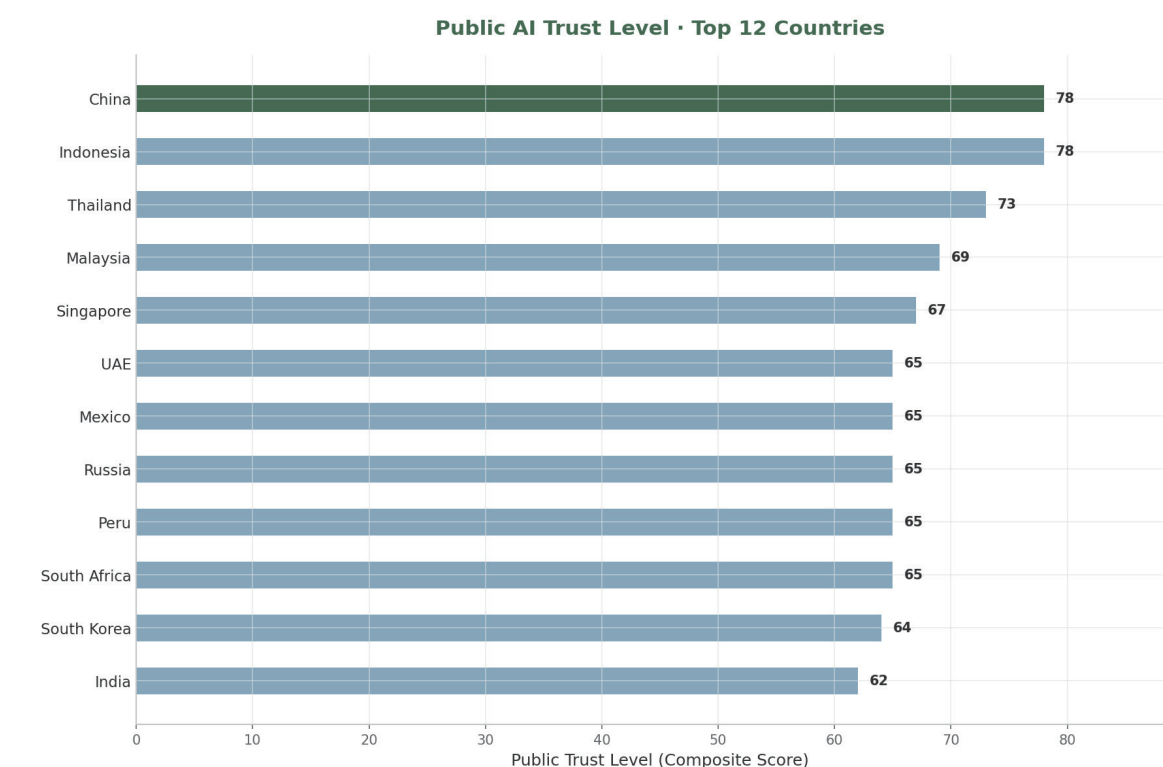


Figure 19. Public AI Trust Level - Top 12 Countries

Public AI Trust reflects the extent to which a society accepts artificial intelligence, and is an important indicator at the social level of the Sustainability dimension. The measurement shows that the public in emerging economies generally holds a more positive attitude toward AI, while the public in some developed countries is relatively

cautious. This contrast is rather thought-provoking, suggesting that a society's acceptance of technological change is not simply correlated with its level of economic development. Public trust in China ranks among the highest in the world, providing a solid foundation of social and public support for the development of AI.

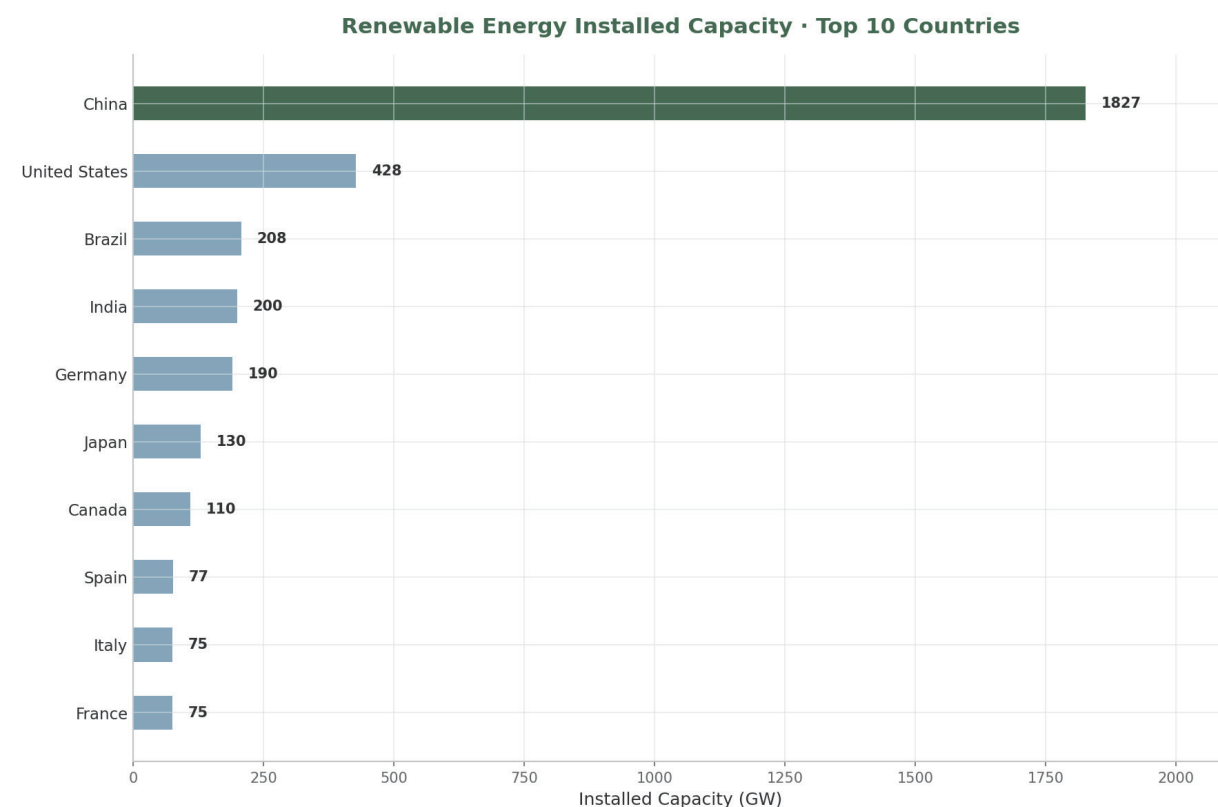


Figure 20. Renewable Energy Installed Capacity-Top 10 Countries

Renewable Energy Installed Capacity is an important pillar at the environmental level of the Sustainability dimension, reflecting a country's potential to supply clean energy for greening its AI computing power. Against the backdrop of rapidly rising energy consumption from frontier model training, the capacity to supply clean energy is becoming increasingly critical.

Countries that lead in installed capacity are mostly those that have invested heavily in new energy. China's renewable energy installed capacity ranks first in the world by a wide margin; as the world's largest installer of wind and solar power capacity, it provides a solid energy foundation for the green development of AI.

(x) Pattern Perspective: Quadrants and Regions

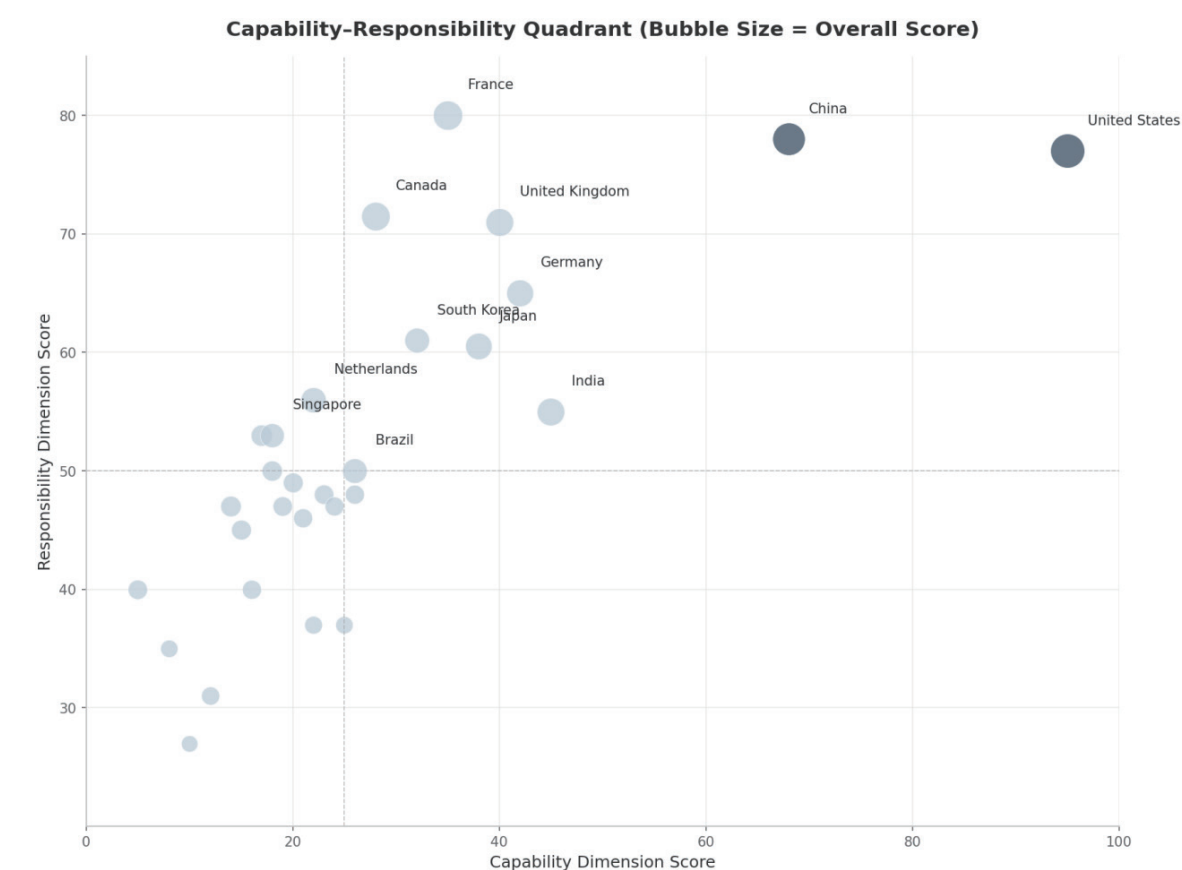


Figure 21. Capability-Responsibility Quadrant (Bubble Size = Overall Score)

The Capability-Responsibility quadrant places each country within a coordinate system formed by two key dimensions. The upper-right quadrant (strong Capability, strong Responsibility) is the most desirable position; at present, only China and the United States have entered this quadrant, possessing both substantial technical capability and a high level of governance responsibility. The upper-left quadrant is home to developed economies such as France, Canada, the United Kingdom, and Japan, which stand out in Responsibility

but are relatively limited in Capability, making them the main suppliers of global governance rules; the lower-left quadrant is largely occupied by emerging economies whose capability and governance still have room to improve. This distribution reveals the layered nature of the global landscape. Of the two countries in the upper-right quadrant, China is one, and its Responsibility score is even slightly higher than its Capability score, reflecting a balanced orientation that gives equal weight to development and security.

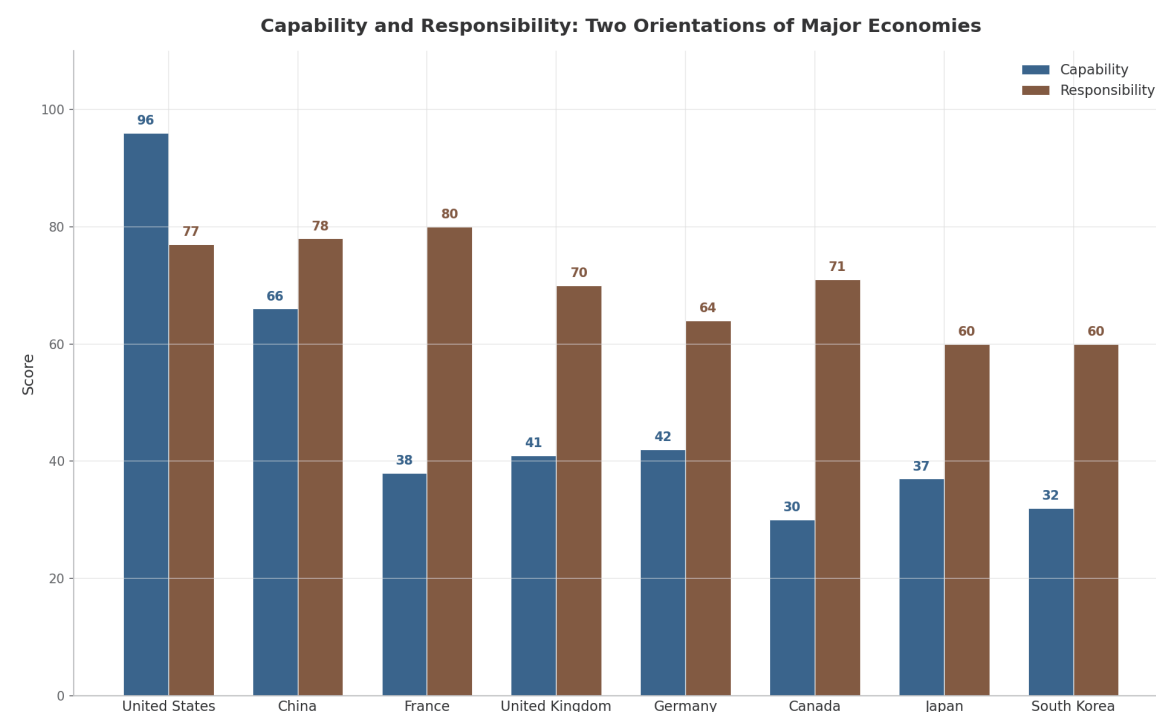


Figure 22. Capability and Responsibility: Two Orientations of Major Economies

Placing the Capability and Responsibility scores of major economies side by side makes their differing strategic emphases clear. The United States' Capability score far exceeds its Responsibility score, making it a typical capability-driven country, while France, the United Kingdom, Canada, Japan, and South Korea exhibit the opposite pattern, with their Responsibility scores noticeably higher than their Capability scores, making them governance-driven countries. This difference does not imply an absolute

hierarchy of better or worse: capability is the foundation for participating in competition, while responsibility is the safeguard for steady, long-term progress, and the ideal state is a unity of the two. In this picture, China's Capability and Responsibility scores are roughly comparable, making it one of the few countries that has achieved a relative balance between the two. This balance closely aligns with the principle, emphasized throughout this report, that capability and governance cannot be pursued at the expense of one another.

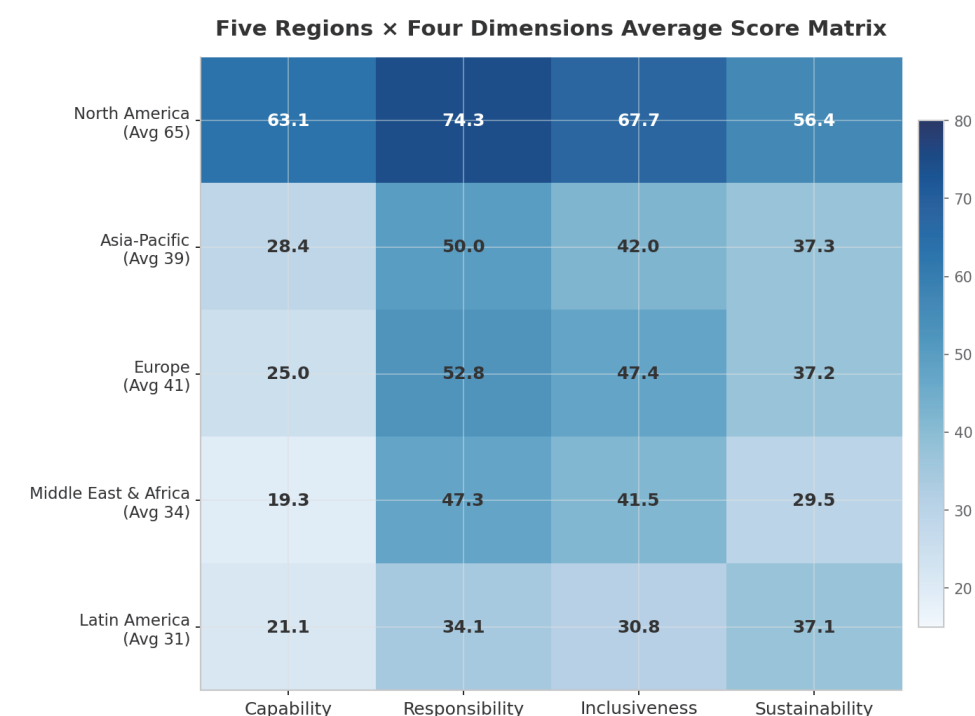


Figure 23. Five Regions x Four-Dimension Average Score Matrix

At the regional level, the five major blocs display a clear gradient. North America ranks first with the highest regional average score, leading comprehensively across all four dimensions. Europe is characterized by collective strength in the Responsibility dimension but relatively lags in Capability, presenting a structure with strong rules but few technology giants. The Asia-Pacific region is sharply divided internally, with a small number of countries strong across all dimensions at one end and capability-weak small and

medium-sized economies at the other. Latin America and the Middle East & Africa both show widespread capability gaps, marking them as regions most in need of capacity-building support in the global digital divide. This regional pattern shows that achieving balanced global development in AI governance remains a long-term undertaking. In the case of Asia-Pacific, the regional average scores for Responsibility and Inclusiveness are notably higher than for Capability, a result owed in large part to the pull exerted by countries such as China.

Four-Dimension Comparison of Major Emerging Economies

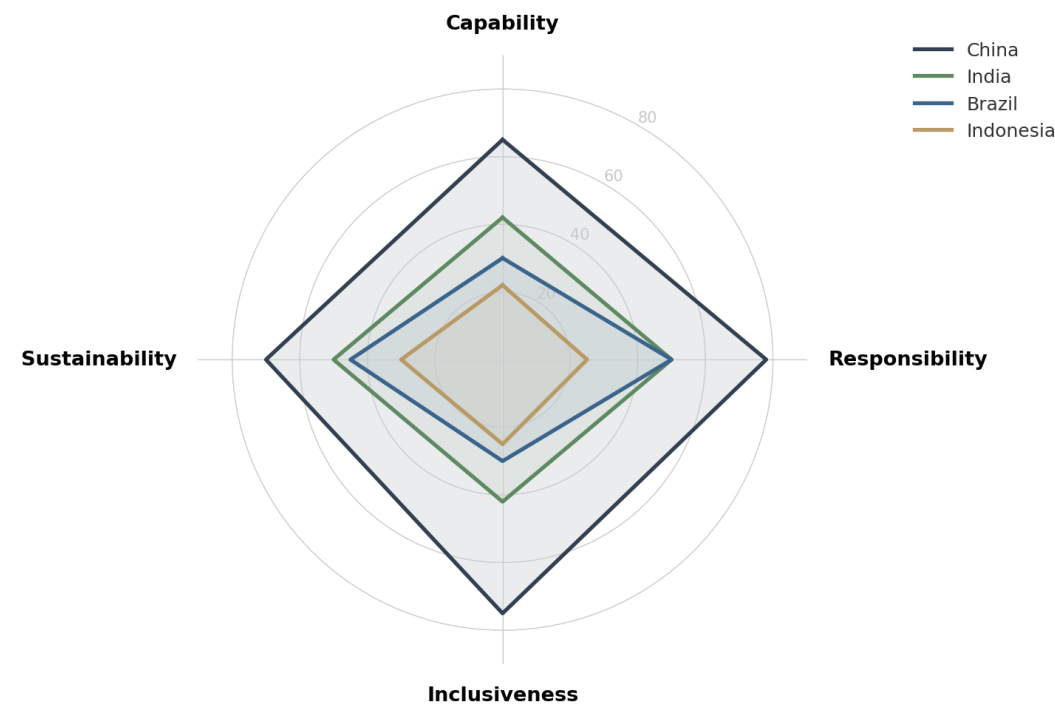


Figure 24. Four-Dimension Comparison of Major Emerging Economies

Among emerging economies, different countries display distinct development characteristics. India stands out in the Society dimension and ranks among the leaders in paper output within the Capability dimension; Brazil, with its abundant clean energy endowment, shows certain bright spots in the Sustainability dimension; and Indonesia is distinguished by its high level of public enthusiasm. These countries represent different paths that emerging economies are

exploring in AI development. Placing China alongside them shows that China's four-dimension profile is relatively fuller and more balanced, ranking among the leaders across multiple dimensions. This indicates that, among the broad group of emerging economies, China has already taken the lead in making the leap from a follower to the first group, and its balanced development—particularly its practice in the Inclusiveness dimension—offers a path of reference for other developing countries.

IV. Conclusion

Based on the AI Governance Index, this report systematically measures the level of AI governance across forty economies worldwide, presenting a diverse and layered global picture. The measurement results show that global AI governance displays a clearly tiered pattern: a small number of countries hold a commanding lead in composite scores that sets them apart from the rest, the second group is highly densely packed, and the broad group of emerging economies generally faces shortfalls in the Capability dimension. More importantly, advantages in global AI are highly dispersed: different countries each

excel in their own arena across the four dimensions of Capability, Responsibility, Inclusiveness, and Sustainability, and the single-indicator championships across the thirty-seven indicators are held by eleven different countries, with no single country achieving a comprehensive monopoly. This picture suggests that progress in global AI governance depends on the contributions of diverse actors in their respective areas and on cooperation among them.

A core feature of this index is that it elevates Inclusiveness and Sustainability to a status equal to that of Capability

and Responsibility, thereby bringing the perspective of the Global South into the evaluation of AI governance. This framework embodies two important principles: the first is balance—meaning that capability and governance cannot be pursued at the expense of one another, and that North and South should be in equilibrium; the second is a graduated structure—meaning that governance advances step by step through Capability, Responsibility, Inclusiveness, and Sustainability. It is precisely within this framework that aspects such as the sharing of benefits and sustainable development—long overshadowed by the capability race in global AI governance—are brought to the fore.

Within this global picture, China's position and distinguishing features deserve particular attention. The measurement results show that China holds a firm second place globally with a score of 71.4, making it one of the few economies to have entered the top group—and the only large developing country among them. China is highly balanced across all four dimensions with no clear shortfalls, ranks first globally in the Inclusiveness dimension, and holds twelve of the thirty-seven No. 1 rankings. Together, these data outline a

distinctive development path: surpassing a singular capability race through balanced development, guarding against risk through responsible governance, and benefiting the world through inclusive sharing. This is precisely the China approach to AI governance that this report sets out to reveal.

The value of the China approach lies not in offering a single template for other countries to replicate, but in demonstrating, through the practice of one large developing country, that the development of AI need not culminate in a unipolar monopoly of capability, but can instead move in the direction of openness, inclusion, and shared benefit. At a time when global AI capability is highly concentrated and the technological divide risks widening further, this path—grounded in balance and inclusiveness—offers a useful insight for building a fairer and more reasonable system of global AI governance. Looking ahead, as artificial general intelligence draws closer, the urgency of global cooperation will only continue to grow. Only by transcending closure through openness, replacing monopoly with sharing, and resolving risk through collaboration can AI truly become a shared good for all of humanity.

