Global AI Readiness Index

Scaling Adoption of AI Agents in the Enterprise

Foreword

The rapid evolution of Artificial Intelligence (AI) presents an unparalleled opportunity to reshape our world. It will drive innovation, enhance productivity, and fundamentally transform how businesses operate and governments serve their citizens. At Salesforce, we believe that the next wave of this revolution, agentic AI, holds the potential to unlock even greater opportunities for growth, impact, and efficiencies and ultimately create profound societal value by fostering human-AI collaboration in new ways and enabling AI systems to more autonomously plan, reason, and act to advance organizational priorities and complete complex tasks on behalf of humanity.

This potential transformation hinges not only on technological advancement but also on establishing a foundation of trust and responsible governance. This Global AI Agents Readiness Index is a contribution to this important discussion. It offers a comprehensive framework for understanding how prepared countries are to harness agentic AI, highlighting the diverse approaches to regulation, diffusion, investment, and talent development across sixteen key global markets.

What this report makes clear is that countries are eager to advance in their transformation journeys. While policymakers have often focused on risk identification and management, there is another imperative: actively enabling the strategic adoption of trusted agentic AI. Future-forward countries that prioritize investment in innovation, infrastructure, talent, upskilling and reskilling, and ethical frameworks will be best positioned to compete, lead in this new era of digital transformation, and navigate thoughtfully the coming future of human-AI collaboration.

Salesforce is deeply committed to fostering trusted agentic AI. Our approach to governance, guardrails, and guidance – including trust layers and mechanisms for visibility, observability and transparency, embedded within solutions like Agentforce – ensures that every interaction is governed by robust data privacy and security controls, reinforcing our number one value: trust. We believe that by building trust into the core of these technologies, we can empower organizations to deploy AI agents confidently and securely, unleashing their full enterprise value.

This Index serves as a valuable resource for governments, businesses, and civil society, providing insights into the strengths and challenges in scaling agentic AI. It underscores the importance of continued investment, cross-sector collaboration, and strategic focus to accelerate adoption and ensure that the benefits of agentic AI are made accessible, scalable, and inclusive for all. Together, we can seize this opportunity to create a future where humans and AI agents together streamline public services, strengthen economic competitiveness, and contribute to a more effective, efficient, and responsive global landscape.

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Executive Summary

The adoption of artificial intelligence (AI), and in particular agentic AI, presents a significant opportunity for both the public and private sectors. These technologies can transform how services are delivered, how businesses operate, and how governments engage with citizens – unlocking new efficiencies, driving economic growth, and enhancing competitiveness.

In recent years, the AI revolution has developed through three waves: predictive AI, generative AI, and now agentic AI. Agentic AI is the technology that powers AI agents so they can act autonomously without human oversight. What sets autonomous agents apart from their predecessors is that they can autonomously plan, reason, and act to complete complex tasks. The adoption of AI agents, working hand-in-hand with human employees, is expected to increase by 327% over the next two years, leading to a 30% productivity gain.

As agentic AI and its applications mature, countries that are prepared to harness their potential will be best positioned to lead in the next wave of digital transformation. To this end, governments worldwide are exploring diverse governance approaches, ranging from comprehensive regulatory frameworks to more flexible, industry-led approaches.

- In the European Union (EU), member states like France, Germany, and Italy will be applying the EU AI Act, a comprehensive, risk-based regulatory framework that categorizes AI systems based on their potential risks – imposing stricter compliance requirements on those deemed high-risk.
- South Korea has adopted a regulatory and governance structure in its recent Basic Law on the Development of AI, combining requirements for certain high-risk systems with measures to promote development and adoption of AI.
- Japan, with its recently adopted Bill on the Promotion of Research, Development and Utilization of Artificial Intelligence-Related Technologies, and Singapore are taking a lighter-touch approach, encouraging voluntary guidelines, industry self-regulation, and ethical AI principles to strike a balance between innovation and responsible AI use.
- Meanwhile, the United States and the United Kingdom have opted for sector-specific approaches with oversight by central agencies and executive actions on a case-by-case basis.
- Other countries like Saudi Arabia and Indonesia are just starting to develop their AI frameworks, focusing on policies for economic growth, digital transformation, and ethical AI frameworks.

While policymakers have often focused on top-down regulation, this may miss critical opportunities. The real challenge isn't just controlling AI – it's actively enabling its strategic adoption, particularly for advanced capabilities like agentic systems. National AI strategies need to shift from reactive oversight to proactive deployment, ensuring countries can harness AI's expanding potential rather than simply manage its risks.

For countries to capture the full benefits of AI and remain competitive in a rapidly evolving landscape, accelerating adoption – through investment, infrastructure, talent, and innovation – must become a top policy priority.

Our Global AI Readiness Index – an expansion and update of Salesforce's Asia Pacific AI Readiness Index that accounts for the latest technological breakthroughs of agentic capabilities – provides a framework for understanding how prepared countries are to seize this opportunity, and points the way towards steps they can take to do so more effectively.

The purpose of this Index is not to rank performance or emphasize gaps in countries' approaches to AI. Rather, it examines the way AI maturity and training can encourage peer learning, targeted investment, and agile experimentation to ensure that the benefits of AI systems with agentic capabilities are made more accessible, scalable, and inclusive.

The Index evaluates AI readiness across 16 key global markets where Salesforce operates, using 31 selected indicators that span five critical dimensions of AI development:

Dimension 1: Enabling AI Regulatory Framework

Foundational Digital and Legal Infrastructure

Dimension 2: AI Diffusion and Adoption

AI Adoption and Readiness across Economy and Government

Dimension 3: AI Innovation

AI Ecosystem and Innovation Outputs

Dimension 4: AI Investment

Financial and Market Conditions for AI Growth

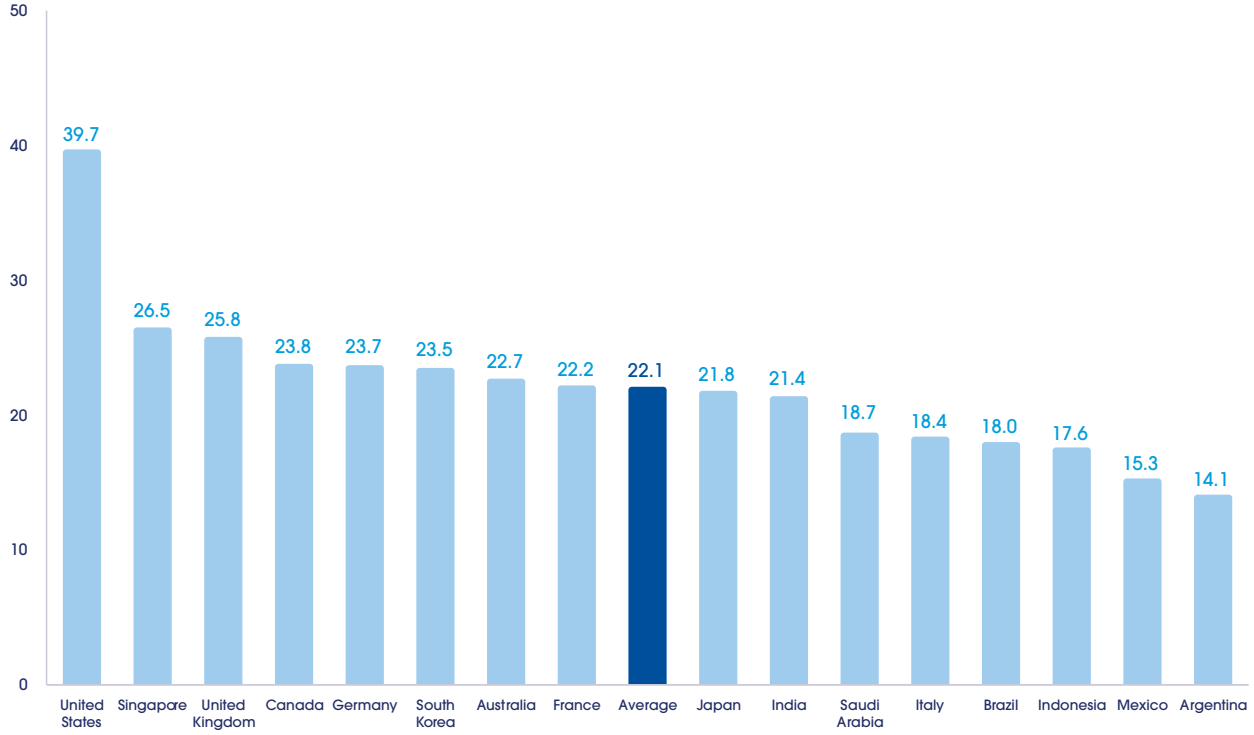
Dimension 5: Human Capital, AI Talent, & Skills

Talent Mobility, Innovation Capacity and Societal Trust

Overview of Findings

The Index reveals both clear leaders and those who have yet some ground to cover to ensure they are ready to adopt and scale agentic AI technologies and systems. Though certain dimensions show a highly uneven distribution of performance – especially investment and the strength of local innovation – most markets have made progress and perform close to the average in their enabling frameworks and pro-diffusion steps.

Figure 1. Overall Index Scores



Source: Access Partnership / AI Policy Lab research

Some countries demonstrate leadership across multiple dimensions, while others are still building the foundational capabilities needed to translate ambition into impact. Overall performance is strongly shaped by the coherence of national strategies, maturity of digital infrastructure, and strength of local investment and innovation ecosystems.

Findings by Dimension

The Index shows that **regulatory readiness (Dimension 1)** is the most advanced and consistent area across countries. Nearly all have introduced national AI strategies, digital governance frameworks, or data protection regimes that form the basis for AI deployment. Singapore, the United Kingdom, and Australia stand out for translating these principles into practice – using tools such as assurance frameworks and AI procurement standards. In contrast, others are still developing or refining their regulatory approaches, and face challenges in aligning governance with digital infrastructure and institutional capabilities.

AI adoption and diffusion across sectors (Dimension 2) is another area of growing strength. Countries are moving beyond pilot initiatives to integrate AI into public services, logistics, finance, and citizen engagement. Singapore, France, and South Korea are embedding AI into digital transformation strategies, while others are focusing on targeted deployments in agriculture, manufacturing, or public administration. However, real-world adoption is uneven, particularly where infrastructure, skills, or trust mechanisms are underdeveloped.

Innovation capacity (Dimension 3) presents the most significant variability. While some countries demonstrate strong research ecosystems and emerging AI start-up communities, few have developed the extensive capacity required to design, test, and scale AI and systems with agentic capabilities. The United States leads in research volume and commercialization, while Singapore and the UK are investing strategically in innovation-enabling policies and partnerships. Meanwhile, many countries still face challenges in building domestic R&D pipelines, linking academia to industry, or securing access to compute infrastructure.

AI investment (Dimension 4) also presents high variability, and seems to be a bottleneck for many countries. Even where strategies are ambitious, public or private capital are not yet mobilized at scale. Some governments have begun launching targeted investment instruments to boost capital availability – such as sovereign funds, national AI missions, or grant programs – but risk appetite and deal flow remain limited. This is especially true in emerging markets, where funding gaps could limit local ecosystems and adoption of agentic systems. Global tech companies and multilateral partners can play a catalytic role in helping build early-stage investment ecosystems.

Finally, human capital (Dimension 5) comes out as a decisive enabler of readiness. Countries with strong vocational systems, coordinated upskilling strategies, and AI-focused education initiatives are better positioned to support responsible deployment. While some are investing heavily in technical skills and AI literacy, others still lack the institutional capacity to deliver large-scale, cross-sector training. Building talent pipelines – including for public sector adoption and procurement – will be critical to ensuring that agentic AI capabilities moves from ambition to implementation.

Recommendations

As countries advance towards greater adoption and deployment of AI agents, there are several steps governments and stakeholders can take to accelerate progress.

1. Scale AI Agent Integration in Public Sector Transformation

Governments should enhance digital maturity, revise procurement frameworks, prioritize use cases that reduce administrative bottlenecks and enhance citizen services, train public sector officials, and embed user feedback mechanisms.

2. Advance Globally Interoperable Governance Frameworks for Agentic AI Systems

Develop clear, risk-based, and globally interoperable governance frameworks that support regulatory certainty, reduce operational risks, and facilitate responsible AI design and deployment. Where governments used common principles to develop their frameworks, efforts should also be made to build agreements of mutual recognition.

3. Strengthen Workforce Readiness for AI Agents

Close the talent gap by designing targeted technical and non-technical curricula relevant to collaboration with agents, creating training AI Centers of Excellence for key sectors, and fostering public-private partnerships.

4. Democratize AI Agent Access for Small and Medium-Sized Businesses (SMBs)

Launch incentive schemes, develop sector-specific playbooks, and expand access to innovation hubs to help SMBs adopt AI tools and improve efficiency.

5. Encourage Sector-Specific AI Governance and Application Models

Develop domain-specific governance models, support industry-led pilots, and facilitate knowledge-sharing to accelerate AI adoption in high-impact sectors.

6. Accelerate Cross-Border R&D and Safety Innovation

Commit to shared R&D investments, expand cross-border collaborations, and establish partnerships between national AI safety institutes to align safety standards and coordinate oversight.

These actions will help to unlock the transformative potential of agentic AI, streamlining public services, strengthening economic competitiveness, and ensuring AI deployment remains secure and accessible to all.

Introduction

What Are AI Agents?

AI Agents are a new generation of AI systems capable of performing complex, multi-step tasks with a high degree of autonomy; they can independently gather and analyze data, formulate plans, and take action.

Enterprises can embed agentic AI technology in both internal and customer-facing business software systems and applications. Working hand-in-hand with human employees, enterprise agents are increasingly used to streamline customer service, accelerate business operations, and assist in decision-making across the public and private sectors. As a first point of contact for the public, they can be available 24/7 to help individuals quickly navigate public information or facilitate routine and self-service interactions.

Salesforce's Agentforce allows enterprises and governments to seamlessly integrate autonomous agents into their existing data systems, business logic, and user interfaces, enabling agents to enhance employee productivity, increase responsiveness, and personalize user engagement. Agents free up time and resources for high-value activities, all while meeting high standards for privacy, security, and accuracy.

The Economic Promise of AI Agents

The rise of AI agents marks a profound shift in the global digital economy, unlocking a new layer of economic value. This leap in capability is already reshaping entire sectors – from finance and manufacturing to logistics and healthcare – by improving operational efficiency, enhancing decision-making, and creating outcome-based service models.

Estimates by PwC suggest that generative AI – a key enabler of AI agents – could contribute between USD 2.6 trillion and 4.4 trillion annually to global GDP by 2030. In specific sectors like energy, corporate investment in generative AI solutions and applications is expected to more than triple, from USD 40 billion in 2023 to over USD 140 billion by the end of the decade, as companies scale up their adoption of AI to enhance productivity, streamline operations, and drive innovation.

In this context, governments from around the world are recognizing AI as a strategic priority. National AI strategies increasingly cite AI's potential to increase productivity, accelerate digital transformation, and create high-value jobs.

AI Agents For Governments: Doing More With Less

Governments today have a unique opportunity to demonstrate the value of AI and respond to clear public demand for AI-driven improvements in public services by becoming early adopters of AI agents. A recent Salesforce study found that 40% of global citizens struggle with government interactions while 90% of global constituents express openness to engaging with AI-powered government services. Constituents have come to expect that the benefits of AI they see when interacting in the private sector are also available in the public sector.

AI agents present substantial opportunities for governments, offering improvements in service delivery, efficiency, and public trust. Governments can deploy AI agents to:

- Automate bureaucratic processes, reduce wait times for services such as permit approvals, simplify tax filing, and streamline processes to access benefits.
- Enhance public engagement, utilizing AI-powered assistants to provide 24/7 responses to citizen inquiries.
- Improve decision-making, leveraging AI to analyze vast datasets and provide actionable insights.

Improving Citizen Public Benefit Access

A recent Salesforce survey found that over one third of Americans struggle to find and access relevant services such as disaster assistance or neighborhood improvement, citing challenges getting questions answered (46%), finding relevant services (35%), and understanding what programs are available to them (33%). Worse, nearly 30% find the process so daunting they don't even try.

AI agents have high potential to improve these citizen interactions with the government, making it quicker and easier to find and access services. Agents can provide 24/7 support to help citizens navigate public information on services and streamline discovery and enrollment processes. Americans express high support for key functions that agents are well positioned to perform, including:

88% automatic enrollment in programs they qualify for

88% pre-filling of forms

89% automatic emergency response coordination

AI Agents For Businesses: Productivity and Efficiency Gains

In the private sector, early adopters of AI agents are reporting measurable gains in efficiency, decision-making, and customer satisfaction. According to Salesforce research, 85% of customer service professionals using AI report time savings, and 83% of sales teams report increased revenue. Further, a Slack study has found that 41% of employee time is reportedly lost to low-value tasks, which AI agents can significantly reduce.

AI agents deliver immediate value for private sector organizations, including:

- Automation of repetitive tasks, which frees employees to focus on strategic activities.
- Enhanced customer service, with AI agents handling inquiries and actioning requests (faster and with greater accuracy), in addition to supporting customer service professionals.
- Data-driven decision-making, providing businesses with insights to refine their business and support strategies.

Securely Accelerating Financial Services Advising

Within a competitive landscape, RBC Wealth Management is on a mission to become faster and more innovative by augmenting their 2,200 financial advisors. In pursuit of this mission, RBC is the industry's first to implement Agentforce. Starting with a priority internal use case, Client Meeting Prep distills a year's worth of unstructured and structured CRM data into a succinct, actionable, and print-ready one-pager for the advisor.

> **As a result, RBC has transformed how 2,200 advisors prepare for client meetings. Users report that a manual prep process that used to take 2–3 hours now takes 45 seconds.**

Financial services is a highly regulated sector, and due-diligence is key. To ensure compliance and prevent fines, AI solutions need to meet high standards of reliability and explainability. Powered by the Atlas Reasoning Engine and unified data in Data Cloud, Agentforce enables RBC to trust – and trace – every output.

Barriers to Adoption

Policymakers and business leaders around the world are eager to achieve the benefits of AI-powered automation through agents. However, agentic AI is a complex technology, and readiness for adoption of AI agents is influenced by multiple factors, any of which can be a bottleneck.

- Working together with employees and on top of underlying infrastructure, AI agents must integrate with enterprise technology and workflows. Countries need organizations that possess or can leverage partners' technical sophistication to successfully experiment with and implement AI agents.
- To translate ambition into sustained success, organizations developing applications of agentic AI technologies also need access to talent and the local capacity for innovation.
- AI technology can be expensive to develop and capital availability can be a constraint in financing the experimentation and innovation that will drive productivity and growth.
- AI agents and their productive applications are developing rapidly, and organizations may struggle to keep up and identify the most effective use cases.
- A clear, stable regulatory environment can offer much-needed certainty for innovation, while ambiguity or overly restrictive rules can hinder progress and adoption.

In addition to institutional capacity, trust is an important foundation for widespread adoption and use. While AI agents can drive major gains in efficiency and decision-making, organizations also seek confidence relating to data privacy, security, accuracy, and responsible use, and doubts can be a key barrier to adoption. Addressing these challenges through robust governance and secure implementation practices is essential to unlocking AI's full enterprise value.

At Salesforce, **trust is our number one value,** which we have built deeply into our products – including AI and agents that we enable customers to deploy. We are committed to ensuring that our customers can attain **trusted agentics**. As outlined in our Trusted AI Agents Impact Report, Agentforce agents bring together all the permissions, guardrails, data governance, and compliance that customers need to ensure trust.

Our Trust Layer integrates multiple technical protections to ensure that every Agentforce interaction is subject to data privacy and security controls, including secure data retrieval, checks for accuracy and toxicity detection, zero data retention of model prompts, as well as monitoring and observability. With these controls, agents have the potential to significantly enhance privacy for interactions involving personal data, by enabling strict boundaries on processing, minimizing surface area for threats, and shielding individuals and organizations from excessive data collection, access, and use while still delivering personalized experiences.

Methodology

As countries position themselves to benefit from evolving AI applications and overcome these barriers, we have developed a new Global AI Readiness Index with a methodology and scope suited to this era of agentic AI.

Over the last several years, as AI technology and applications have rapidly developed and evolved from predictive to generative AI, Salesforce has analyzed different markets' readiness to adopt AI and generative AI based on quantitative measures – for example, see our Asia Pacific AI Readiness Index and UK AI Readiness Index.

Re-tooled to better address the unique aspects of AI agent adoption, the Global AI Readiness Index comprises 31 indicators organized into five "dimensions" of AI adoption:[1]

Dimension 1: Enabling AI Regulatory Frameworks

Foundational Digital and Legal Infrastructure (5 indicators)

Evaluates the foundational legal and digital infrastructure needed to support AI deployment. It looks at the presence of open government data, digital service maturity, data protection laws, cross-border data policies, and the strength of legal frameworks for emerging technologies.

Dimension 2: AI Diffusion and Adoption

AI Adoption and Readiness across Economy and Government (9 indicators)

Assesses the extent to which AI and AI agents are being adopted and promoted across economies and governments. It includes indicators on business use, public sector skills development, national strategies, AI governance institutions, and the explicit inclusion of agentic AI in national digital priorities.

Dimension 3: AI Innovation

AI Ecosystem and Innovation Outputs (6 indicators)

Captures the innovative strength of a country's AI ecosystem, focusing on the number of AI, generative AI, and agentic AI companies, research outputs, citations, and patents. It reflects a country's capacity to produce, commercialize, and scale new AI technologies.

1 A detailed description of all indicators used in the Index is available in the 'Appendix 1. Methodology' section.

Dimension 4: AI Investment

Financial and Market Conditions for AI Growth (4 indicators)

Measures the financial health of the AI landscape, venture capital activity, and total funding levels for AI, generative AI, and agentic AI companies. It provides insight into the capital available to fuel AI growth and experimentation.

Dimension 5: Human Capital, AI Talent, & Skills

Talent Mobility, Innovation Capacity and Societal Trust (7 indicators)

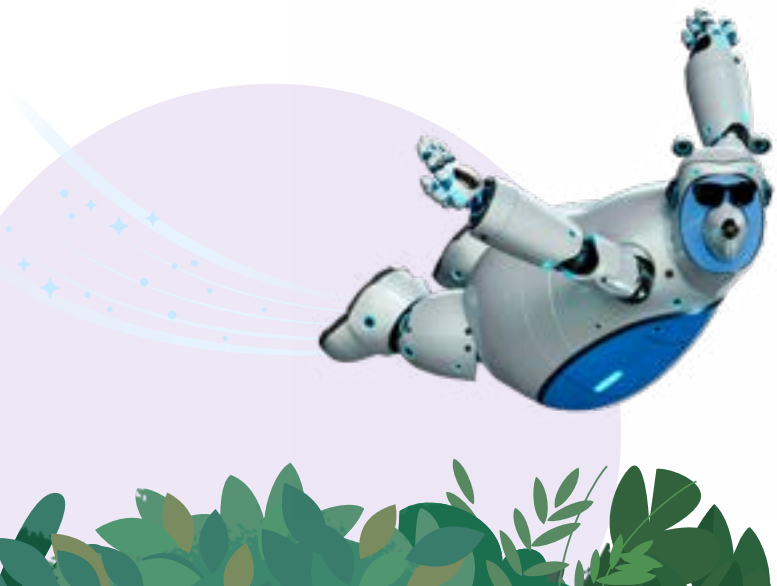
Evaluates workforce readiness and broader innovation capacity. It includes indicators on AI skills availability, talent mobility, public investment in research and education, innovation-friendly business environments, and levels of public trust in AI systems.

The indicators that represent each dimension were chosen for their relevance, accessibility, and ability to provide a consistent, cross-country view of AI maturity and readiness – particularly in relation to AI agents.

While no single metric can fully capture the complexity of evolving national ecosystems, the Index offers a data-driven snapshot that reflects broader structural trends and policy momentum. It is not intended to account for every nuance of on-the-ground implementation, but rather to surface comparative insights and highlight general patterns that are shaping the global trajectory of AI adoption.

The Index covers 16 countries where Salesforce operates locally and that are taking active steps to lead in or accelerate AI innovation and adoption: Argentina, Australia, Brazil, Canada, France, Germany, India, Indonesia, Italy, Japan, Mexico, Saudi Arabia, Singapore, South Korea, the United Kingdom (UK), and the United States of America (USA).

These markets are already making tangible progress in adopting AI technologies and represent diverse regulatory, economic, and institutional contexts. They offer useful insights into how AI ecosystems are evolving – and how AI agents, in particular, can be scaled responsibly and effectively. Many of these countries are also well positioned to serve as regional anchors, sharing expertise and helping other governments advance their own AI readiness journeys.

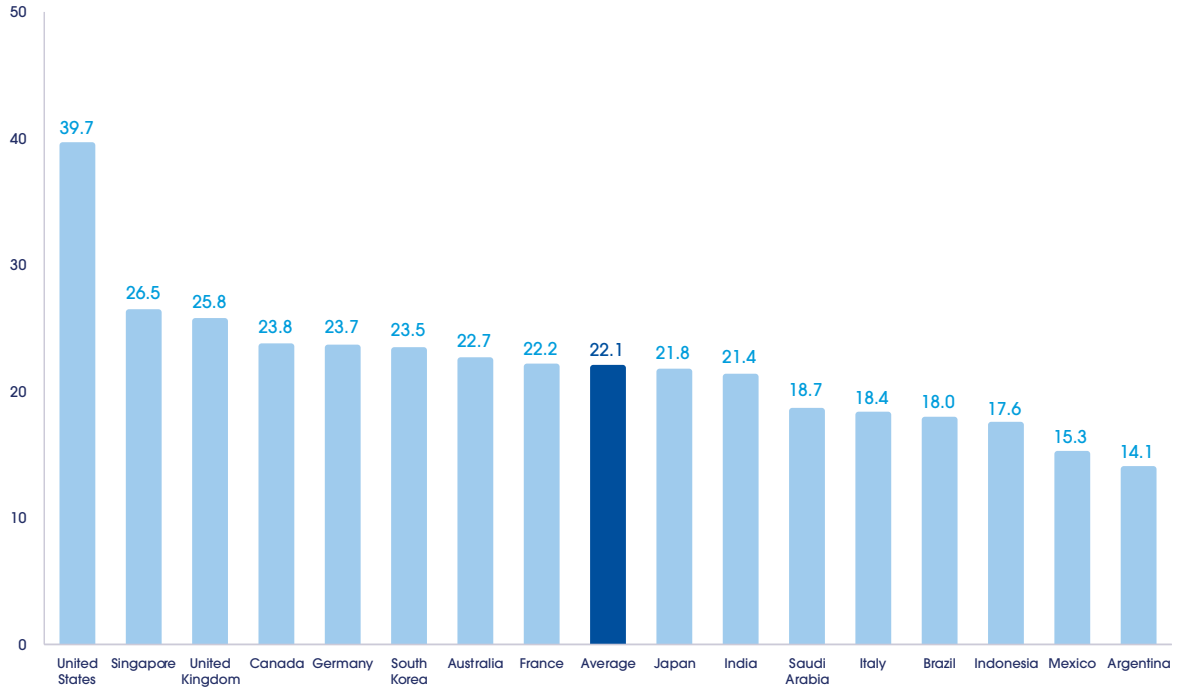


Key Findings

General Findings

As they take steps to attain the potential of AI, the Index clearly illustrates how countries are positioned in terms of their readiness to enable and operationalize agentic AI capabilities. While several countries demonstrate strength across multiple dimensions, including enabling frameworks, innovation, infrastructure, and talent, others are in earlier stages of capability development. While markets vary in their progress toward scaling applications of agentic AI, with some excelling in specific areas, a general convergence is evident, indicating that countries are collectively moving in the right direction.

Figure 2. Overall Index Scores



Source: Access Partnership / AI Policy Lab research

Some, like the United States, Singapore, the United Kingdom, Canada, and Germany, demonstrate a high degree of institutional coordination, advanced digital infrastructure, and active engagement from both public and private sectors.

- The United States stands out for its strong innovation pipeline, deep capital markets, and vibrant startup ecosystem. Singapore shows balanced performance across governance, adoption, and talent, supported by a strategic national approach.
- The United Kingdom and Canada benefit from mature data governance regimes and effective sector-level deployment – particularly in healthcare and public administration. Germany combines industrial strength with strong vocational training systems, though lags slightly in AI-specific capital mobilization.

Other countries show growing momentum in key areas but still face structural or institutional constraints that limit their ability to operationalize agentic AI systems at scale.

- South Korea and Japan have successfully integrated AI into manufacturing, logistics, and smart city initiatives, yet face challenges in innovation funding and ecosystem diversification.
- Australia and France have adopted forward-leaning AI governance approaches and are piloting AI across public services but must strengthen their domestic research ecosystems and accelerate capital mobilization.
- India is showing notable progress in innovation and start-up activity, particularly in applied AI domains, though gaps in regulatory coordination and institutional readiness persist.
- Saudi Arabia has made significant state-led investments in AI, underpinned by its national strategy, but continues to build out its skills base and ecosystem maturity.

Several countries are still in the earlier stages of ecosystem development, with AI strategies or governance mechanisms in place but more limited capacity in execution, innovation, and scale.

- Italy is aligned with a well-developed EU regulatory regime but faces challenges in translating policy into investment and infrastructure.
- Indonesia and Mexico have introduced national AI strategies, though both predate the widespread development of generative AI, as well as digital governance initiatives. However, they continue to grapple with foundational issues such as connectivity, institutional capacity, and workforce readiness.
- Brazil is gaining traction through public sector pilots and increased policy attention, though sustained funding and ecosystem coordination remain barriers.
- Argentina is beginning to explore AI use in public administration, but still faces broader constraints across infrastructure, skills, and innovation funding.

Key Trends

A few key trends emerge from these findings:

- **Convergence in AI Readiness:** There is a general convergence in AI readiness among the countries studied, indicating that many countries are making progress in developing their AI ecosystems, regulatory frameworks, and innovation capacities.
- **Shared Challenges and Opportunities:** Countries face common challenges and opportunities in AI adoption. The similar scores imply that countries are encountering and addressing similar issues, such as regulatory alignment, investment in AI, and workforce readiness.
- **Potential for Peer Learning:** The proximity of scores suggests that countries can benefit from peer learning and sharing best practices. Since many countries are at similar stages of AI readiness, they can collaborate and learn from each other's experiences to accelerate their AI adoption and innovation efforts.
- **Need for Differentiation:** For countries to stand out and lead in AI adoption, they may need to focus on specific areas where they can differentiate themselves. This could involve investing more heavily in certain dimensions, such as AI innovation or human capital development, to gain a competitive edge.
- **Balanced Progress:** The similar scores across indicators suggest that countries are making balanced progress across different dimensions of AI readiness. This balanced approach is crucial for sustainable and comprehensive AI adoption, ensuring that no single aspect is neglected.

Across contexts, countries are moving in the right direction toward greater AI enablement. Overall, the closeness of scores highlights the importance of continued investment, collaboration, and strategic focus to advance AI readiness and leverage the full potential of AI technologies.

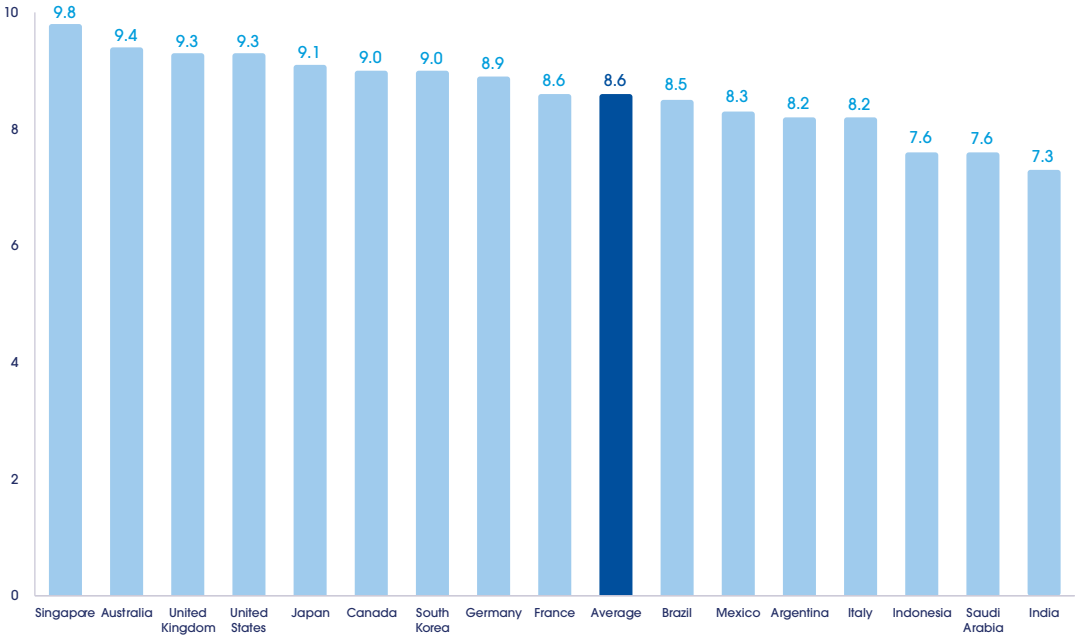
With strong foundations already established, there is now a pivotal opportunity to build momentum by deepening investment in innovation, talent, and capital, and by turning national strategies into scalable, inclusive deployment models with real world impact. Strengthening these enablers will help countries not only accelerate domestic adoption of AI agents but also play a leading role in advancing international collaboration and regional progress.

Dimension Findings

Dimension 1: Enabling AI Regulatory Frameworks — Foundational Digital and Legal Infrastructure

A robust regulatory foundation is one of the clearest areas of strength across countries in the Index. Most have developed national AI strategies, data governance frameworks, and privacy legislation that lay an important groundwork for agentic AI deployment. However, the depth, enforceability, and implementation of these frameworks vary significantly across jurisdictions.

Figure 3. Dimension 1 Index Score



Source: Access Partnership / AI Policy Lab research

High-performing countries such as Singapore, Australia, the United Kingdom, and the United States are distinguished by their operational focus – translating principles into action through regulatory sandboxes, assurance frameworks, and public sector procurement standards. Singapore's Model AI Governance Framework and National AI Strategy 2.0, Australia's National Framework for the Assurance of AI, and the United Kingdom's sector-specific guidelines offer pragmatic tools to build trust in real-world applications.

In the EU, France, Germany, and Italy adhere to the bloc's risk-based EU AI Act, yet at the national level, institutional readiness varies significantly. Italy, for instance, takes a fragmented approach to supporting small and medium-sized enterprises in adopting AI. Despite initiatives like the national AI strategy, only 8% of Italian companies have implemented AI solutions – a low adoption rate that may be attributed to limited digital skills among the workforce and regional disparities in technological infrastructure and support.

In comparison, Germany and France are more proactive in operationalizing their regulatory frameworks, using instruments such as national AI guidelines, assurance schemes, and sector-specific standards to support the safe and effective deployment of AI.

Outside the EU, Canada, and Japan pursue adaptive and principle-based models, though Canada's patchwork between federal and provincial regimes presents a challenge to coherence.

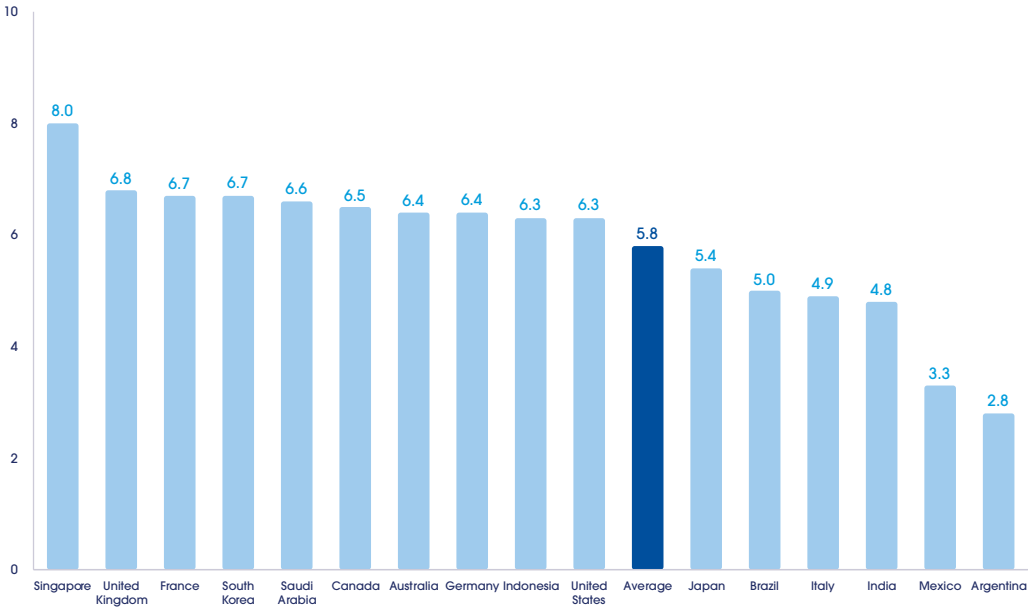
Meanwhile, countries such as India, Saudi Arabia, and Indonesia have adopted AI strategies but lack the legal clarity or institutional mechanisms to support scale-ready deployment. In Argentina and Mexico, national frameworks are under development, but progress is hampered by capacity constraints and fragmented oversight.

Key takeaway: To advance agentic AI applications, governance structures must go beyond risk management to actively enable innovation, investment, experimentation, and cross-sector collaboration.

Dimension 2: AI Diffusion and Adoption — AI Adoption and Readiness across Economy and Government

Diffusion and promotion of AI technologies across the economy and government is one of the areas of strongest country performance in the Index. Many countries have moved beyond pilot initiatives to embed AI into public services, business processes, and digital transformation strategies – creating real momentum for the uptake of agentic systems.

Figure 4. Dimension 2 Index Score



Source: Access Partnership / AI Policy Lab research

Singapore and the United Kingdom lead in this area. Singapore's Smart Nation vision and AI procurement guidelines ("Public Sector AI Playbook") drive integration across transport, urban planning, and citizen services. The United Kingdom's financial and healthcare sectors, supported by the NHS and the FCA, are leveraging AI to enhance service delivery and risk management.

France, South Korea, and Saudi Arabia also show strong institutional adoption through use-case deployment and public-private collaboration, while Canada, Australia, Germany, and Indonesia are integrating AI into industry and smart city initiatives.

By contrast, countries like Mexico and Indonesia, despite formal strategies, show limited diffusion into public services or business operations. Brazil and India are actively deploying AI in agriculture and digital government but often face scale-up challenges due to infrastructure or skills bottlenecks.

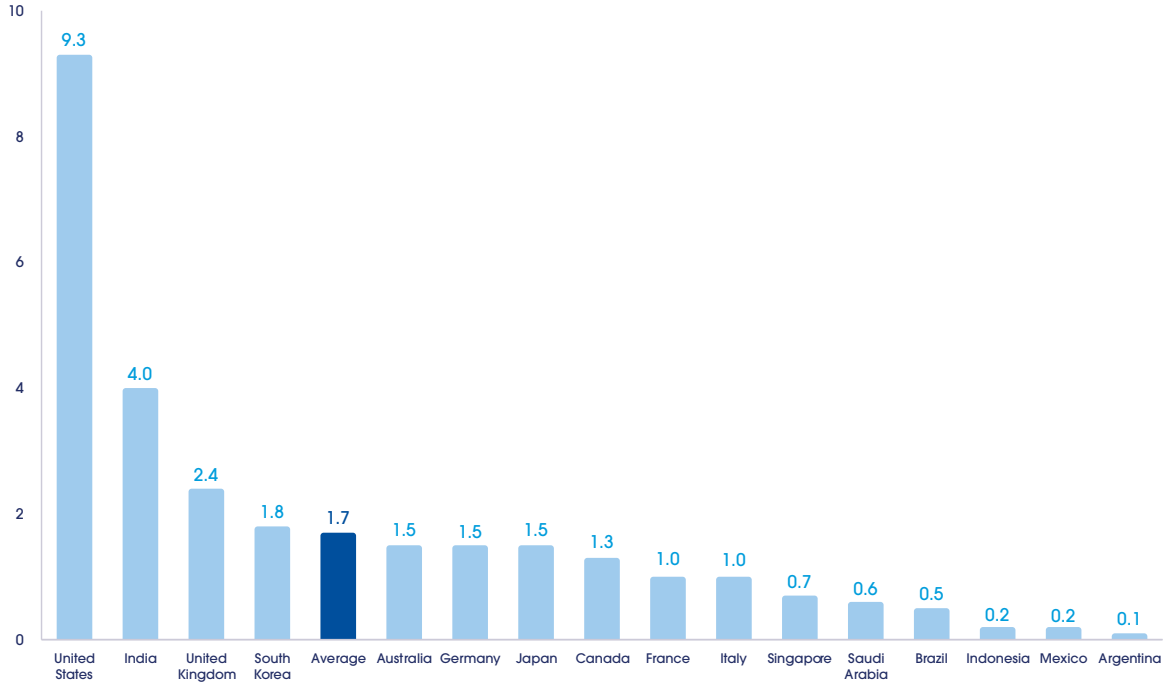
Japan and Italy are advancing national initiatives, but sectoral adoption is uneven and largely confined to more digitally mature institutions.

> **Key takeaway:** To meaningfully accelerate agentic AI, countries should prioritize deployment in domains where autonomy adds clear value – such as logistics, service, public administration, and infrastructure management. The private sector also has a critical role to play in enterprise-grade agent adoption, particularly in productivity-enhancing applications such as digital assistants, workflow automation, analytics tools, as well as customer-facing support services.

Dimension 3: AI Innovation — AI Ecosystem and Innovation Outputs

Innovation capacity is one of the most uneven dimensions across the Index, with lead performers that are centers of innovation far in front. While many countries articulate strategic ambitions, fewer currently possess the R&D intensity, ecosystem maturity, or start-up activity of those markets at the frontier.

Figure 5. Dimension 3 Index Score



Source: Access Partnership / AI Policy Lab research

The United States stands out as the clear innovation leader, underpinned by its deep AI research ecosystem, high patent output, and globally dominant AI companies. India follows, distinguished by strategic investments and government-backed academic–industry partnerships.

Meanwhile, the United Kingdom and South Korea maintain strong research infrastructures and growing start-up ecosystems, though they still depend on larger platforms for foundation models and compute resources.

Australia, Germany, Japan, and Canada also show high innovation momentum, particularly in applied AI research and start-up formation. However, the lack of stable funding pipelines and commercialization infrastructure limits scale and maturity. Singapore and Saudi Arabia, while having largely enabling environments for AI, have relatively concentrated innovation landscapes, with less focus on emerging subfields such as agentic or goal-directed AI.

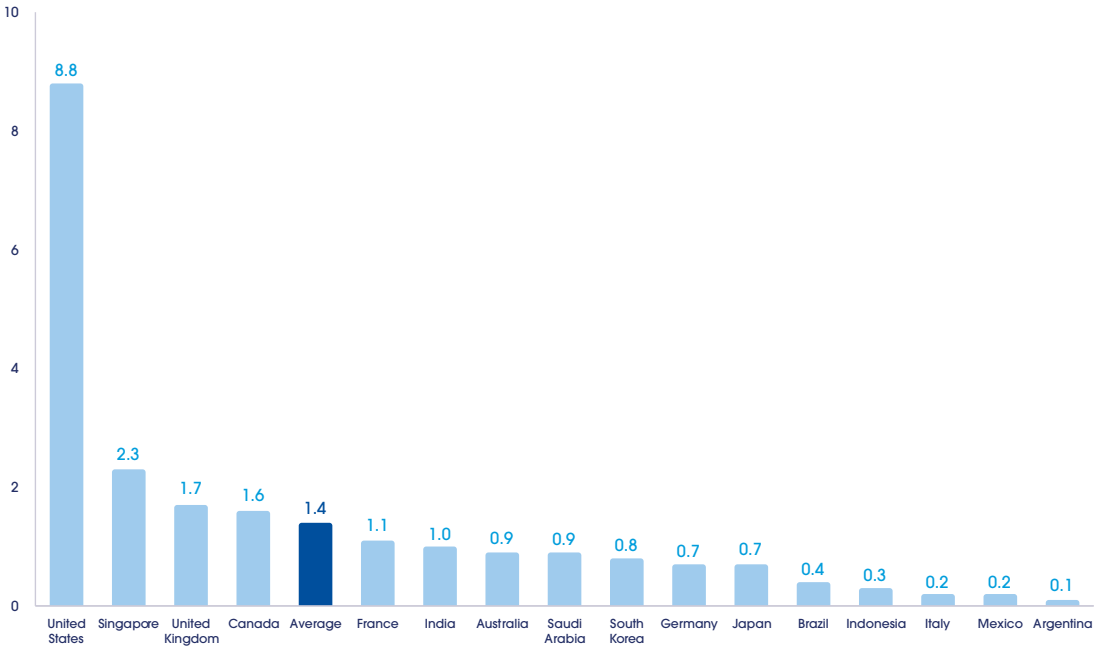
Innovation capacity is especially constrained in Indonesia, Mexico, and Argentina, where limited R&D funding, sparse research networks, and weak linkages between academia and industry inhibit the growth of a local AI base. These countries often depend on external platforms or imported technologies – making it harder to adapt systems with agentic capabilities to national contexts.

Key takeaway: While not every country needs to invest in highly capital-intensive frontier AI development, strategic investments can help accelerate the innovation and experimentation that will underpin practical adoption. To close this gap, governments should invest in mission-driven innovation programs and compute infrastructure. Public funding instruments such as innovation grants or compute credits can catalyze experimentation, while international partnerships can help build capacity. The private sector should be incentivized to support foundational and open-source research that feeds into regional innovation ecosystems.

Dimension 4: AI Investment — Financial and Market Conditions for AI Growth

Resources dedicated for AI investments – especially in agentic technologies – is one of the most significant bottlenecks for many countries. While high-level policy ambition is widespread, only a few countries have successfully mobilized sustained financial support for AI development and deployment of productive applications.

Figure 6. Dimension 4 Index Score



Source: Access Partnership / AI Policy Lab research

The United States leads in this area, with a mature venture capital ecosystem, large-scale public-private initiatives, and sustained interest from institutional investors. Singapore, the United Kingdom, and Canada are beginning to close the gap with sovereign funds, strategic grant schemes, and national AI missions that encourage uptake and experimentation.

France, India, and Australia have launched targeted investment programs but still struggle to match the velocity and risk appetite seen in the United States.

Investment environments in South Korea, Germany, Japan, and Saudi Arabia are evolving, with new public funding programs and growing private interest, particularly in fintech, logistics, and e-government platforms. However, these ecosystems often face structural barriers to scale – such as limited access to growth-stage capital, underdeveloped capital markets, and fragmented investor networks. In Indonesia, the AI investment environment is constrained by limited access to growth-stage capital, and institutional barriers that hinder the scale-up of promising ventures. While national strategies signal intent, investor ecosystems remain fragmented and risk appetite remains low. In Brazil, similar challenges persist despite recent commitments to AI funding. While the country is advancing several initiatives – such as the Brazilian National AI Strategy and growing interest in green data centers powered by its abundant clean and affordable energy-progress remains uneven. The capital market is still shallow, with early-stage investments concentrated in a few sectors, limiting broad-based support for AI innovation and scale-up.

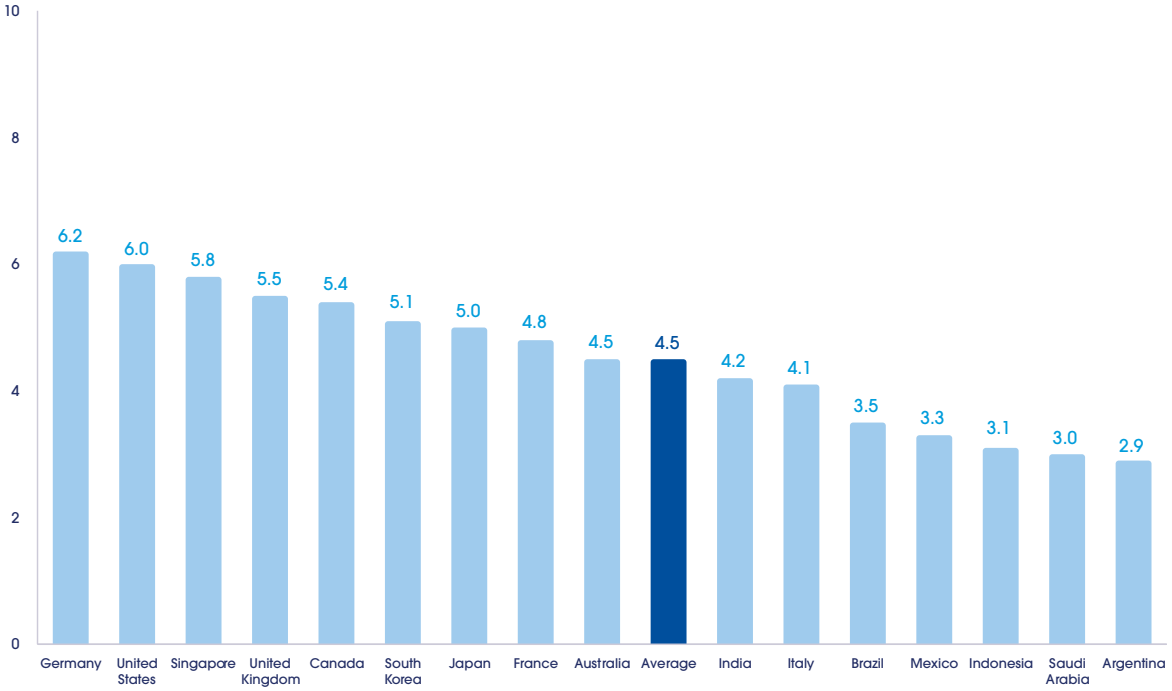
The investment picture is particularly constrained in Italy, Mexico, and Argentina, where start-up funding is low, and public financing instruments are often limited in scope or consistency. Without better-aligned financial incentives, development and deployment of AI agents in these contexts risks being confined to small-scale pilots.

Key takeaway: To address these constraints, governments must treat AI investment as an engine of economic competitiveness – on par with digital infrastructure or industrial policy. This includes deploying blended finance instruments, de-risking mechanisms, and co-investment models to crowd in private capital. Multinational firms and global tech providers also have a role to play in seeding ecosystems and supporting scalable applications in under-capitalized markets.

Dimension 5: Human Capital, AI Talent, and Skills — Talent Mobility, Innovation Capacity and Societal Trust

Human capital is a foundational enabler of readiness for agentic capabilities – but varies across markets. Countries with strong vocational systems, interdisciplinary research capacity, and coordinated reskilling programs are far better positioned to ensure that organizations can integrate AI agents into core workflows and decision-making structures. Countries at all levels are already taking policy steps to promote different types of AI skills in education and the workforce (see **Appendix 1 - National AI Skills Focus**).

Figure 7. Dimension 5 Index Score



Source: Access Partnership / AI Policy Lab research

Germany, the United States, Singapore, and the United Kingdom are leading examples, combining strong AI skills pipelines with policy-backed national upskilling strategies. Canada, South Korea, and Japan also show depth in STEM education and talent retention, though efforts to broaden AI fluency across the public sector and non-technical domains remain ongoing.

By contrast, countries like Indonesia, Saudi Arabia, and Argentina face gaps in applied AI training and sector-specific readiness. These gaps reflect broader challenges around educational system alignment, limited reskilling opportunities, and institutional fragmentation.

Likewise, Australia, India, and Italy are investing in digital skills, but scale and accessibility remain key hurdles.

Key takeaway: Governments should embed AI literacy into general education systems, build specialized programs to upskill civil servants and professionals, and support cross-sector knowledge exchange. AI capability must go beyond data scientists to include policymakers, procurement officers, and frontline workers - those who will oversee and collaborate with AI agents. Countries like Germany and Canada, known for their vocational excellence, are particularly well-positioned to lead regional and international talent initiatives. The private sector must also continue playing a leading role in building scalable learning platforms, mentoring networks, and real-world training environments.

Recommendations

As countries progress in adopting AI capabilities, now is the time to accelerate collective efforts to unlock the benefits. Building on the findings of the Index, governments and AI stakeholders – including industry and academia – should take practical, forward-looking actions to speed the adoption of AI agents by strengthening innovation ecosystems, building skills, unlocking investment, and enabling inclusive, real-world deployment.

1. Scale AI Agent Integration in Public Sector

Public sector services provide essential help for large volumes of constituents, businesses, and organizations, often requiring context, personalization, and deep expertise in policies. This makes public sector services a natural proving ground for the benefits of AI agents.

In top-scoring economies, governments have the digital maturity needed to deploy AI agents in high-volume, repetitive tasks that strain administrative capacity and slow service delivery. Other markets can still realize benefits in these areas with targeted investments. By prioritizing public sector digital development and integration, governments can both improve outcomes and build societal trust in AI.

Governments should:

- Revise and implement the procurement frameworks and technical guidance that streamline safe and accountable deployment of AI agents in public services. This includes providing resources and reducing administrative hurdles to empower procuring agencies to quickly access, pilot, and iterate on impactful use cases with commercial technology.
- Prioritize use cases that directly reduce administrative bottlenecks and improve citizen-facing workflows (e.g. permitting, licensing, social benefits).
- Continue to invest in government technology systems to ensure that public sector data can be integrated and leveraged securely for AI.
- Take steps to train and facilitate knowledge diffusion among public sector officials that will design, use, oversee, and make critical procurement decisions regarding AI systems.
- Embed mechanisms for user feedback, appeal, and transparency in all AI-enabled public services to preserve accountability.

Salesforce Contribution: With Salesforce's Agentforce, government employees can work hand-in-hand with AI agents to automate processes, offload simple tasks, and enable government employees to focus on the high-value, high-complexity items. Salesforce's unique Trust Layer further protects privacy and security with features like dynamic grounding, zero data retention, and toxicity detection, helping to ensure responsible AI use and maintain high safety and security standards. Free learning resources like the Trailhead platform or AI Literacy and Compliance Guide can help public officials traverse the learning curve and gain familiarity.

2. Advance Interoperable Governance Frameworks for Agentic AI Systems

Enterprises across markets can approach AI agent adoption cautiously due to regulatory uncertainty, operational risk, and unclear compliance expectations. Accelerating adoption will require governance frameworks that provide clarity, align with risk profiles, and enable interoperability across jurisdictions. To the extent possible, they should seek to leverage and extend existing laws, e.g. privacy laws, that businesses are already familiar with to the AI context.

These frameworks can help businesses navigate legal, technical, and ethical risks across jurisdictions, particularly as agentic systems begin to operate autonomously and interact across jurisdictions.

Governments and industry should:

- Develop governance frameworks that support responsible agentic AI design and deployment, including guidance on risk management, transparency, and auditability.
- Encourage interoperability across regulatory regimes to reduce friction for cross-border deployment and enterprise adoption. This includes, where possible, establishing mechanisms for mutual recognition when frameworks are developed using common principles.
- Support pre-standardization initiatives such as open technical protocols, shared taxonomies, and sandbox collaborations to eventually inform future international standards.

Salesforce Contribution: Salesforce's active participation in leading national and international technical and governance forums – including the US NIST AISIC, the WEF Center for Cybersecurity, the OWASP GenAI Security Project, Singapore's AI Verify Foundation, and others – positions it as a key contributor to the evolving design practices for AI agent systems. Its insights into real-world deployments can inform best practices and accelerate alignment across the ecosystem.

3. Strengthen Workforce Readiness for AI Agents

Workforce readiness is one of the weakest dimensions across countries, with most economies lacking the skills infrastructure to support widespread AI adoption.

The success of AI agents depends not just on the technology, but on the capacity of people to design, manage, and adapt to new human-AI workflows. Governments, industry, and academic institutions must work in lockstep to close the talent gap and prepare workers across sectors for new roles and responsibilities.

Governments and industry should:

- Design and roll out targeted curricula that prepare both technical and non-technical professionals to work effectively with AI agents.
- Create AI Centers of Excellence focused on retraining civil servants, healthcare professionals, and educators for service delivery centered on human-agent collaboration.
- Support public-private partnerships to build cross-sectoral knowledge exchange and skilling pipelines that increase access to practical, up-to-date training programs.

Salesforce Contribution: Salesforce's Trailhead platform and AI workforce readiness initiatives can be scaled to support regional talent pipelines and skilling efforts. Salesforce has partnered with Adecco to launch a new venture focused on helping companies build an integrated workforce of humans and AI agents at scale. In Brazil, Salesforce established a partnership with the state of Rio Grande do Sul to train 1.5 million people in AI. As a result of alignment among the private sector, public authorities, and civil society, the initiative offers free learning paths ranging from basic digital tools to artificial intelligence. The goal is to equip youth, workers, and public servants for the future of work.

4. Democratize AI Agent Access for SMBs

AI has significant potential to augment and enhance the competitiveness of small and medium-sized businesses (SMBs), giving them the tools to rapidly scale their resources and capabilities on par with larger enterprises.

SMBs are increasingly aware of AI's potential to drive growth. A Salesforce study found that while 75% of SMBs globally are investing in AI, adoption is uneven – especially among those with limited technical resources or budget flexibility. Notably, growing SMBs are 1.8 times more likely to invest in AI than their declining peers, underscoring the competitive advantage it can unlock. At the same time, 90% of SMBs with AI report more efficient operations, and 85% say they expect a return on investment, signaling strong upside for those that gain access.

Yet many still face structural barriers to adoption. Awareness of available tools and use cases, affordability, skills, and integration challenges continue to hold many businesses back, particularly in underserved or lower-income markets.

Governments should:

- Launch incentive schemes (e.g. cloud credits, vouchers, public-private grants) to lower cost and risk for SMBs adopting AI agent tools.
- Develop sector-specific playbooks and onboarding guides to help SMBs understand how AI agents can improve efficiency, customer experience, and revenue.
- Expand access to SMB-focused innovation hubs and regulatory advisory services that support responsible experimentation and deployment.

Salesforce Contribution: Agentforce brings the power of autonomous, intelligent agents into the hands of small business owners, making AI accessible and impactful. Salesforce enables scalable, cost-effective deployment of AI agents for SMBs through cloud-native solutions that integrate trust-by-design features. As an extension of our Salesforce ecosystem, most of whom are SMBs, we organize open Agentblazer and Trailblazer communities as spaces for continual upskilling and sharing of best practices in our products. In Singapore, we partnered with the government on the Digital Enterprise Blueprint to equip SMBs and workers with essential expertise, resources, and technologies. As part of this effort, Salesforce launched the Data + AI Boost SME Program to help SMBs leverage data and AI for growth.

5. Encourage Sector-Specific AI Governance and Application Models

Sectors vary widely in their AI readiness, risk and trust environments, and regulatory complexity. This makes broad-based or one-size-fits-all frameworks less suited to address the different dynamics of AI adoption across the different sectors.

Leading countries are developing domain-specific governance and deployment models that align with sectoral norms, risks, and data ecosystems. Scaling these approaches can accelerate adoption where it matters most, while ensuring fit-for-purpose safeguards.

Governments and regulators should:

- Co-create sector-level deployment playbooks for high-impact domains such as healthcare, finance, education, and transport.
- Support sandboxes for industry-led pilots and use-case demonstrations that can test agentic AI tools against clear performance, usability, and trust criteria.
- Facilitate international and domestic knowledge-sharing on successful regulatory and implementation models for AI agents.

Salesforce Contribution: With its experience delivering domain-specific solutions in sectors like healthcare, education, and financial services, Salesforce is well-positioned to partner with regulators and industry to operationalize trustworthy AI agent applications. For example, Salesforce was among the first companies to publish our report to the OECD's Hiroshima AI Process, which aims to support understanding, transparency, and international knowledge-sharing on AI systems.

6. Accelerate Cross-Border R&D and Safety Innovation

The global AI safety and innovation landscape is increasingly fragmented, especially in middle-income economies where investment and capacity-building are uneven.

Without stronger international cooperation, gaps in safety assurance and regulatory alignment will continue to grow. A coordinated approach to agentic AI R&D is critical to maximizing benefits.

Governments should:

- Commit to shared investment in R&D programs that focus on safe, inclusive, and socially beneficial agentic AI applications, such as targeted grants and innovation challenge funds.
- Expand cross-border AI testbeds, research consortia, and open science collaborations to foster innovation and knowledge diffusion.
- Establish formal partnerships between national AI safety institutes to align on safety standards and common taxonomies, share real-world evaluation data, and coordinate oversight approaches.

Salesforce Contribution: Salesforce's contributions on safety, hallucination mitigation, and AI evaluation metrics make it a valuable ally in global innovation coalitions. Salesforce Research has contributed to AI development for over 10 years. Since 2014, it has has published 200+ research papers and registered 300+ AI patents.

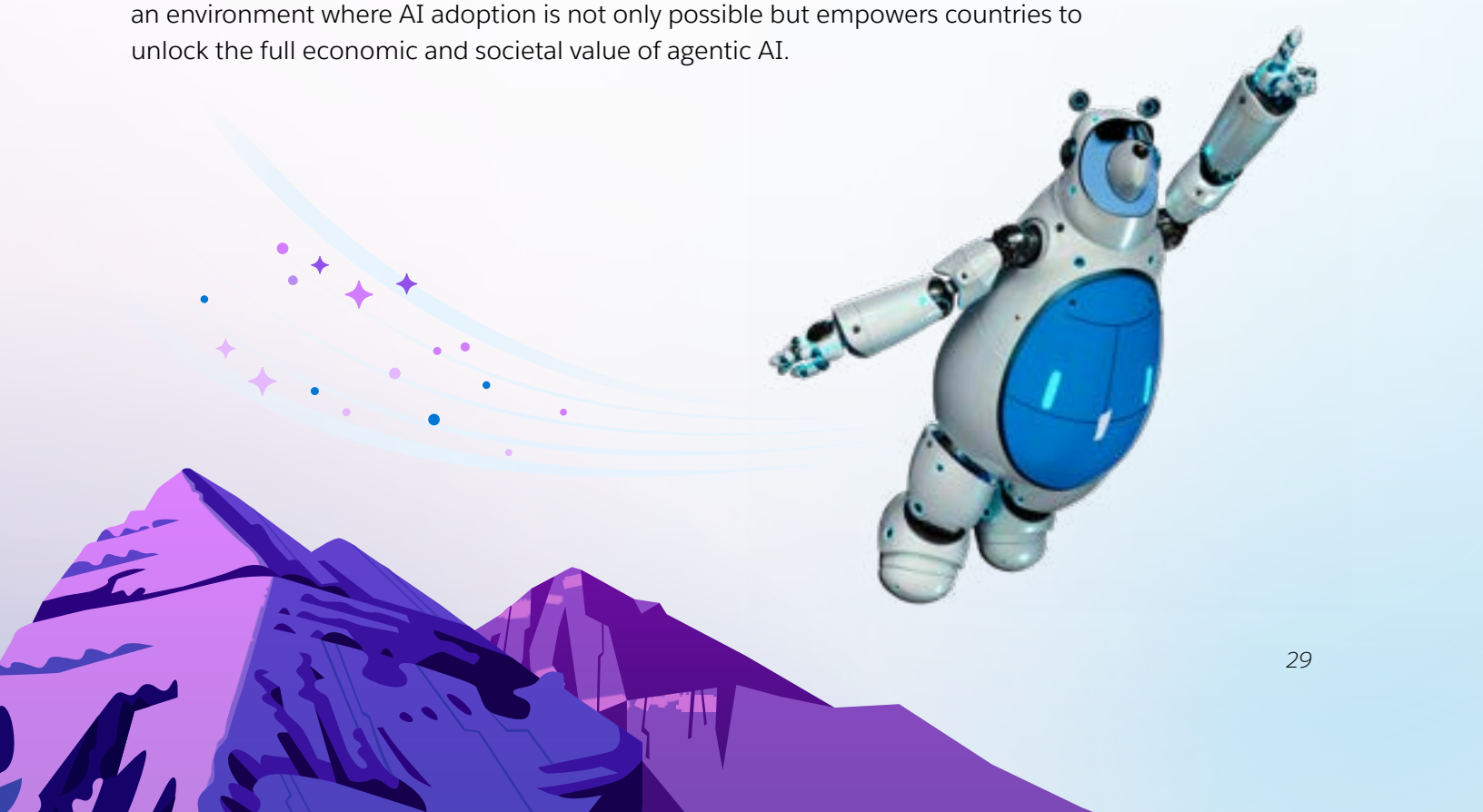
Looking Ahead: Seizing the Agentic AI Opportunity

Agentic AI is revolutionizing industries, offering transformative potential across both public and private sectors. To sustain momentum and unlock the full promise of AI agents, governments must carefully consider the regulatory and non-regulatory steps that will best support continued progress.

Governments should focus not only on guiding principles or regulatory compliance but also on strategies that foster AI adoption. This includes facilitating investment in R&D and infrastructure, promoting cross-sector knowledge sharing, coordinating policy, upskilling the workforce, and encouraging demand-driven experimentation.

Beyond traditional policy tools, governments have a wide range of non-regulatory mechanisms at their disposal to accelerate the adoption of AI agents. Financial, institutional, and educational levers will be critical to accelerating AI agent deployment and ensuring its benefits are both scalable and widely shared. Diffusion of agentic AI capabilities will depend not just on technology availability but also on building institutional and public confidence in its use.

Salesforce is committed to collaborating with governments, enterprises, and all stakeholders as we advance on the journey toward AI agents. Together, we can create an environment where AI adoption is not only possible but empowers countries to unlock the full economic and societal value of agentic AI.



Appendix I: Detailed Findings

Full findings

Table 1. Full Breakdown of Index Scores

	Overall Index Score	Dimension 1: Enabling AI Regulatory Frameworks	Dimension 2: AI Diffusion and Adoption	Dimension 3: AI Innovation	Dimension 4: AI Investment	Dimension 5: Human Capital, AI Talent, & Skills
	Total Score (out of 50)	Dimension Score (out of 10)	Dimension Score (out of 10)	Dimension Score (out of 10)	Dimension Score (out of 10)	Dimension Score (out of 10)
Argentina	14.1	8.2	2.8	0.1	0.1	2.9
Australia	22.7	9.4	6.4	1.5	0.9	4.5
Brazil	18.0	8.5	5.0	0.5	0.4	3.5
Canada	23.8	9.0	6.5	1.3	1.6	5.4
France	22.2	8.6	6.7	1.0	1.1	4.8
Germany	23.7	8.9	6.4	1.5	0.7	6.2
India	21.4	7.3	4.8	4.0	1.0	4.2
Indonesia	17.6	7.6	6.3	0.2	0.3	3.1
Italy	18.4	8.2	4.9	1.0	0.2	4.1
Japan	21.8	9.1	5.4	1.5	0.7	5.0
Mexico	15.3	8.3	3.3	0.2	0.2	3.3
Saudi Arabia	18.7	7.6	6.6	0.6	0.9	3.0
Singapore	26.5	9.8	8.0	0.7	2.3	5.8
South Korea	23.5	9.0	6.7	1.8	0.8	5.1
United Kingdom	25.8	9.3	6.8	2.4	1.7	5.5
United States	39.7	9.3	6.3	9.3	8.8	6.0
Average	**22.1**	**8.6**	**5.8**	**1.7**	**1.4**	**4.5**

Source: Access Partnership / AI Policy Lab research

National AI Skills Focus Areas

The skills matrix below illustrates the national focus areas in AI skills development across the 16 countries covered in this Index. It captures government-led priorities across six domains: generative AI, agentic AI, frontier AI, inclusive AI, responsible and ethical AI, and applied or sector-specific AI. These categories reflect the evolving capabilities and skills most likely to be associated with the next wave of AI technologies, particularly agentic systems that operate autonomously and integrate into everyday decision-making and service delivery.

This mapping reinforces a key finding from the Index: while countries are progressing in regulatory and strategic enablement, workforce readiness remains uneven and is often the weakest link in scaling AI adoption. As the shift toward agentic AI accelerates, countries will need to ensure their education, training, and upskilling strategies are responsive to the specific operational, ethical, and sectoral demands of this technology.

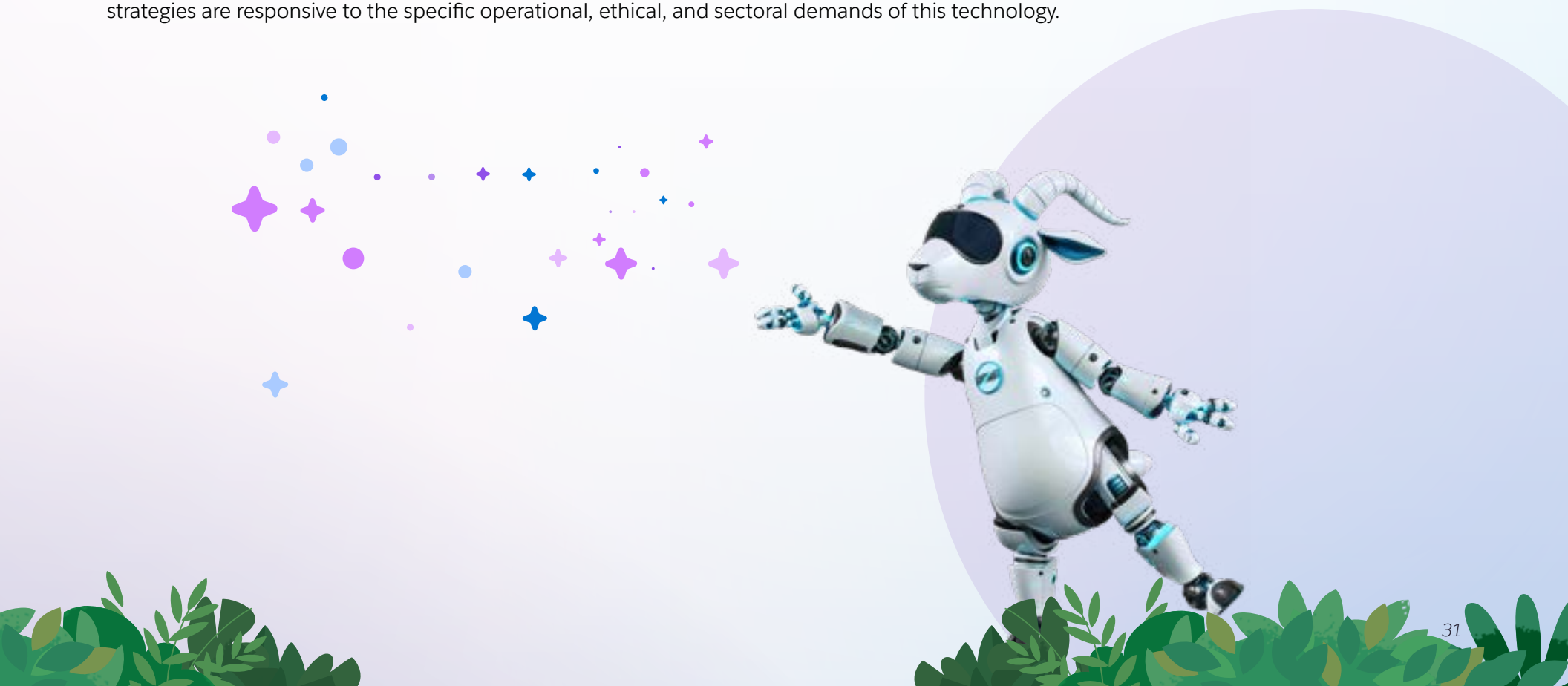


Table 2. Matrix of National Approaches to AI Skills, by type of AI

Country, National Strategy	Generative AI	Agentic AI	Frontier AI	Inclusive AI	Responsible & Ethical AI	Applied AI
Definitions	Generative AI focuses on creating new content like text, images, or code	Agentic AI refers to AI systems that possess the ability to act autonomously, make decisions independently, and adapt to changing environments in pursuit of specific goals	Frontier AI represents the most exploratory and innovative AI models, pushing the boundaries of what AI can do	AI that is designed and deployed to equitably serve diverse communities, ensuring accessibility, reducing bias, and addressing the needs of underrepresented groups	The development and use of AI guided by principles of fairness, transparency, accountability, and safety, supported by clear governance frameworks to prevent harm and uphold human rights	**Sector-specific AI use cases**
Argentina, National AI Program for Justice	✓				✓	Legal, Security
Australia, Australia's AI Action Plan			✓	✓	✓	Manufacturing, Security, Agriculture, SMEs, Finance, Logistics, Utilities, Construction, Food and Beverage, Healthcare, Environment
Brazil, Artificial Intelligence Plan (PBIA) 2024-2028, AI Brazil Strategy 2021	✓	✓	✓	✓	✓	Logistics, Transportation, Healthcare, Agriculture, Public sector
Canada, Pan-Canadian Artificial Intelligence Strategy, The Impact of the Pan-Canadian AI Strategy	✓	✓			✓	Healthcare, Environment
France, National AI Strategy, Make France An AI Powerhouse					✓	SMEs
Germany, AI Strategy	✓				✓	Healthcare, Security, Environment, Education
India, National Strategy for Artificial Intelligence			✓	✓	✓	Healthcare, Agriculture, Education, Infrastructure, Transportation
Indonesia, The Indonesian National Strategy on Artificial Intelligence	✓				✓	Healthcare, Public sector, Food and Beverage

Country, National Strategy	Generative AI	Agentic AI	Frontier AI	Inclusive AI	Responsible & Ethical AI	Applied AI
Definitions	Generative AI focuses on creating new content like text, images, or code	Agentic AI refers to AI systems that possess the ability to act autonomously, make decisions independently, and adapt to changing environments in pursuit of specific goals	Frontier AI represents the most exploratory and innovative AI models, pushing the boundaries of what AI can do	AI that is designed and deployed to equitably serve diverse communities, ensuring accessibility, reducing bias, and addressing the needs of underrepresented groups	The development and use of AI guided by principles of fairness, transparency, accountability, and safety, supported by clear governance frameworks to prevent harm and uphold human rights	**Sector-specific AI use cases**
Italy, Italian Strategy for Artificial Intelligence 2024-2026	✓	✓				Information and Communications Technology, SMEs, Public Sector
Japan, AI Strategy 2022	✓				✓	Food and Beverage, Healthcare, Energy, Transportation, Agriculture, Logistics, Manufacturing
Mexico	Development of Mexico's national AI strategy has halted.					
Saudi Arabia, National Data & AI Strategy 2020, AI Ethics Principles 2023	✓				✓	Public sector, Healthcare, Education
Singapore, National Artificial Intelligence Strategy 2.0	✓	✓	✓		✓	Finance, Public sector, Healthcare, Security, Transportation
South Korea, National Strategy for AI Intelligence	✓		✓			Public sector, Healthcare, Tourism, Education
United Kingdom, National AI Strategy	✓			✓		Health, Environment, Public sector, Financial services sector
United States	No comprehensive federal AI law. National AI Action Plan under development as of June 2025					

Thank You

Learn more about Salesforce
Public Policy here.

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