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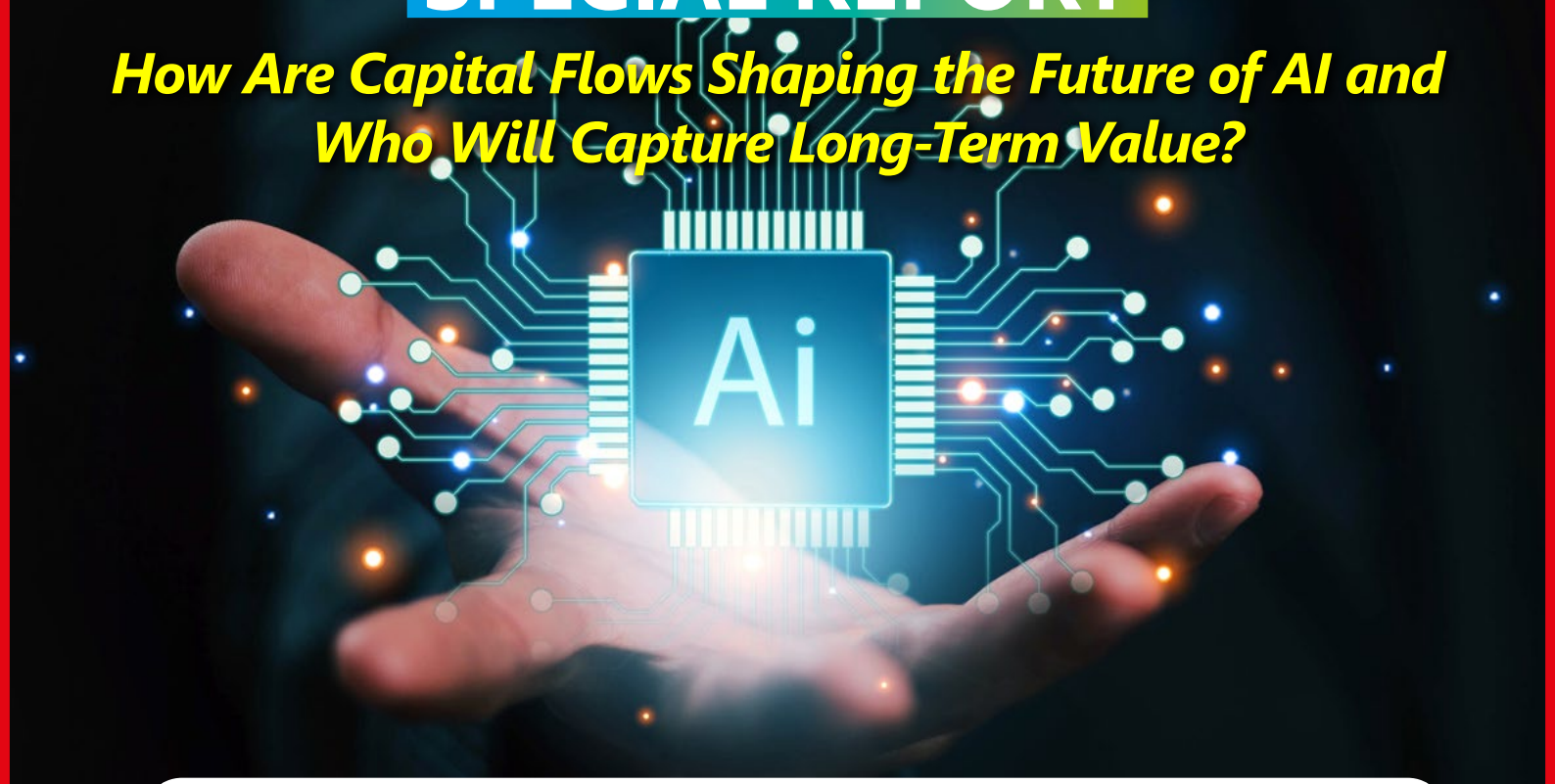
ROUNDTABLE PODCAST SERIES – EPISODE SIX

SPECIAL REPORT

How Are Capital Flows Shaping the Future of AI and Who Will Capture Long-Term Value?



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Anand Jeevaraj
Vice President
Infosys

The Biggest AI Opportunity Has Yet to Arrive

The global AI conversation remains heavily focused on infrastructure. Data centers are expanding, hyperscalers continue investing billions, and semiconductor manufacturers are racing to meet demand. Yet the greatest economic value from AI is unlikely to come from infrastructure itself. The real winners will be the platforms that sit on top of that infrastructure. Every major technology transformation eventually creates an operating layer that connects hardware, software, applications, and users. AI is following a similar trajectory. Infrastructure provides the foundation, but platforms will ultimately become the operating systems that enable organizations to generate value from AI. The challenge is that enterprises are not moving as quickly as the market expects.

AI Is Not A Technology Project

Many organizations still approach AI as a technology initiative rather than a business transformation effort. This mindset creates one of the biggest barriers to adoption. Successful AI deployment requires organizations to rethink processes, redesign workflows, develop talent, and transform decision-making structures. Technology alone cannot accomplish these objectives. Most enterprises are still preparing for this transition. They are evaluating use cases, assessing talent requirements, and determining where AI can generate meaningful returns. That process takes time.

Why The GCC Has An Advantage

Saudi Arabia and the wider GCC possess several advantages that position them favorably within the global AI economy. The region has access to capital, energy resources, land, and long-term strategic planning. These assets create favorable conditions for large-scale infrastructure development and sovereign AI capabilities. At the same time, caution remains necessary. Infrastructure investments only generate value when adoption follows. Data centers, compute capacity, and platforms must eventually support real-world applications that improve productivity and create economic returns. The next phase of AI will therefore depend less on who builds the most infrastructure and more on who creates the most value from it. Platforms, talent, and transformation will ultimately determine success. ■

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TOP 9 TAKEAWAYS

PLATFORMS WILL CAPTURE FUTURE VALUE

Anand Jeevaraj
Vice President, Infosys

1. No previous technology has attracted investment, adoption, and infrastructure development at the speed currently seen across the global AI ecosystem.

2. The greatest long-term value will emerge from AI platforms that connect infrastructure, models, tools, and enterprise applications into scalable operating environments.

3. Organizations are moving cautiously because AI transformation requires significant changes to business models, workforce capabilities, and operating structures.

4. Many enterprises lack the AI expertise and transformation leadership needed to redesign processes and implement AI effectively at scale.

5. Organizations must recognize AI as a company-wide transformation initiative rather than treating it as a standalone technology project.

6. Saudi Arabia and GCC countries possess the capital, energy resources, and land required to support large-scale AI infrastructure development.

7. Massive infrastructure investments carry risks if enterprise adoption fails to grow quickly enough to generate sustainable returns on deployed capital.

8. Building national AI infrastructure strengthens security, resilience, and technological independence while supporting broader economic development objectives.

9. Oil and gas companies continue adopting AI cautiously, prioritizing operational reliability while gradually deploying AI across production and optimization activities.

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"Production optimization, predictive maintenance, and faster decision-making represent some of the most valuable AI opportunities in energy."

Anand Jeevaraj
Vice President, Infosys

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SOUNDINGS

"Sovereign AI infrastructure is strategically important because it strengthens national resilience, security, and long-term technological independence."

Anand Jeevaraj
Vice President, Infosys

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Amith Rajan
EVP, Head, Wholesale Digital Banking, Mashreq
& CEO, NeoVentures

AI Is Entering Its Most Important Phase: Delivering Returns

Artificial intelligence has reached a point few technologies ever achieve. The speed of adoption, scale of investment, and level of public awareness have combined to create a global transformation unlike anything seen before. Yet beneath the excitement lies a more important question: when will AI begin delivering measurable enterprise value? Today, investment continues to flow aggressively toward infrastructure. Data centers, hyperscalers, semiconductor manufacturers, and foundation model providers have become the primary beneficiaries of the AI boom. Capital markets are rewarding companies that promise to shape the future of intelligence, and investors remain willing to finance that vision at unprecedented levels. However, there is a growing distinction between infrastructure investment and business outcomes. While platform providers continue to attract enormous valuations, most enterprises are still in the early stages of realizing measurable returns from AI adoption.

The Data Challenge Remains Underestimated

One of the most overlooked realities of AI transformation is the scale of data preparation required. Organizations often focus on models and technology while underestimating the effort needed to cleanse, organize, govern, and contextualize enterprise data. The challenge is particularly significant because AI adoption is not simply a technology initiative. It requires operational transformation, organizational change, and new ways of working. Enterprise adoption inevitably moves slower than consumer adoption because businesses must balance innovation with risk, compliance, and scalability.

Collaboration Will Create More Value Than Disruption

Predictions that fintech companies would replace traditional banks have proven simplistic. Instead, collaboration has emerged as the dominant model. Fintechs bring agility, innovation, and experimentation. Banks provide scale, regulatory expertise, capital, and customer access. Together, they create stronger ecosystems than either could achieve independently. AI is accelerating this convergence. Software development cycles are shortening dramatically, innovation is becoming faster, and new opportunities are emerging across financial services. The next chapter of AI will not be defined by infrastructure investment alone. It will be defined by the organizations capable of converting that infrastructure into sustainable business value. ■

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TOP 9 TAKEAWAYS

CAPITAL MUST DELIVER REAL AI VALUE

Amith Rajan
EVP, Head, Wholesale Digital Banking, Mashreq
& CEO, NeoVentures

1. Capital is flowing aggressively into AI infrastructure and hyperscalers, but measurable enterprise outcomes remain in early stages as organizations continue evaluating long-term value creation.

2. While AI platforms attract record valuations and investment, organizations are still searching for clear business outcomes capable of justifying sustained large-scale spending.

3. Data centers, chips, hyperscalers, and foundational platforms are receiving the majority of AI investment before applications and enterprise adoption generate broader returns.

4. Rapid capital inflows can create inflated expectations as companies leverage AI narratives before demonstrating meaningful products, sustainable business models, or measurable outcomes.

5. Organizations consistently underestimate the effort required to cleanse, organize, and govern data before AI systems can generate reliable and scalable business results.

6. Consumer enthusiasm for AI does not automatically translate into enterprise success because organizational adoption requires broader operational, technological, and cultural transformation.

7. The future is increasingly collaborative, with banks providing scale and regulation while fintechs contribute agility, innovation, and rapid deployment capabilities.

8. AI is significantly reducing software development timelines, enabling organizations to build and deploy solutions faster while improving productivity across technology teams.

9. AI investments require long-term commitment because transformational technologies often take years before delivering sustained returns and industry-wide productivity improvements.

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"Fintechs bring agility and innovation while banks contribute scale, regulation, and customer reach. The future belongs to collaboration."

Amith Rajan
EVP, Head, Wholesale Digital Banking, Mashreq & CEO, NeoVentures

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"AI adoption is not simply a technology challenge. It requires long-term investment, organizational transformation, and patience before measurable returns become visible."

Amith Rajan
EVP, Head, Wholesale Digital Banking, Mashreq & CEO, NeoVentures

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Gaurav Mathur
Chief AI & Data Center Officer
JLL, Saudi Arabia

The Enduring Value Of AI Lies Beneath The Headlines

Most discussions about artificial intelligence focus on applications. New tools generate attention, attract investment, and dominate headlines. Yet the most significant value creation is occurring elsewhere. The real transformation is happening within the foundational layers of the AI ecosystem. Capital is increasingly flowing toward infrastructure, cloud environments, semiconductor technologies, and scalable AI platforms. These investments are not simply supporting current applications. They are reshaping the entire AI stack that future innovation will depend upon. Applications may capture attention, but platforms create enduring value.

Context Is The Missing Ingredient

Artificial intelligence becomes most effective when it understands the specific context of an industry. Organizations possess unique datasets, operational processes, and business logic that generic models cannot fully understand. The ability to layer domain expertise onto AI systems creates more accurate insights, better decisions, and greater business outcomes. This principle is particularly relevant within real estate, where AI can improve construction quality, asset performance, facility management, maintenance planning, and operational efficiency.

Saudi Arabia's Structural Advantage

Saudi Arabia occupies a unique position in the emerging AI economy. The Kingdom combines access to capital, energy resources, land availability, connectivity infrastructure, and long-term strategic commitment. Together, these factors create a compelling economic case for large-scale AI infrastructure deployment. Importantly, AI infrastructure should not be viewed only as a consumer of resources. AI itself plays an essential role in optimizing energy consumption, improving water management, increasing reliability, and enhancing operational performance. As the ecosystem matures, governance and standards will become increasingly important. Sustainable growth requires trusted frameworks capable of balancing innovation with accountability. Ultimately, the greatest value from AI will not come from isolated applications. It will emerge from integrated ecosystems that combine infrastructure, platforms, governance, and industry expertise into scalable engines of economic growth. ■

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TOP 9 TAKEAWAYS

FOUNDATIONAL ECOSYSTEMS CREATE ENDURING VALUE

Gaurav Mathur
Chief AI & Data Center Officer, JLL, Saudi Arabia

1. While applications attract attention, enduring value comes from scalable AI platforms and ecosystems capable of supporting long-term transformation.

2. Investment is shifting beyond applications toward infrastructure, cloud platforms, semiconductors, and foundational technologies that support future AI growth.

3. Organizations generate superior outcomes when AI systems understand industry-specific data, business logic, and operational context rather than relying solely on models.

4. AI is improving construction quality, operational efficiency, asset performance, and decision-making across the real estate value chain.

5. Saudi Arabia's resource advantages enable highly competitive AI infrastructure development with attractive economics for local and international workloads.

6. Strategic connectivity through global fiber networks allows Saudi Arabia to serve international AI workloads while maintaining acceptable latency levels.

7. Strong market demand continues supporting confidence in large-scale AI infrastructure projects expected to come online over coming years.

8. The same AI infrastructure consuming resources can also improve efficiency in water, energy, maintenance, and operational management systems.

9. Strong governance, compliance, and adherence to international standards remain essential for attracting investment and building trusted AI ecosystems.

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"Reliability, security, and cost efficiency remain the most important considerations for AI infrastructure investments."

Gaurav Mathur
Chief AI & Data Center Officer, JLL
Saudi Arabia

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"Saudi Arabia is not simply investing in AI. It is actively building an integrated ecosystem founded on governance, standards, and scale."

Gaurav Mathur
Chief AI & Data Center Officer, JLL, Saudi Arabia

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Hani Elshafey
AI Researcher, Educator & Trainer
Saudi Arabia

Infrastructure Alone Will Not Create AI Leadership

The global race to build artificial intelligence capabilities is often measured through investments in data centers, cloud infrastructure, and computing capacity. While these investments remain important, they do not guarantee long-term success. True AI leadership requires something far more difficult to build: human capability. Saudi Arabia has emerged as one of the most compelling AI stories globally because its ambitions extend beyond technology adoption. The Kingdom is investing in infrastructure, applications, and talent simultaneously, creating the foundations for a sustainable AI economy. This balanced approach recognizes a critical reality. AI creates value only when people know how to deploy it effectively.

The Human Capability Layer

Three layers underpin successful AI ecosystems. The first is infrastructure: cloud platforms, data centers, and digital networks capable of supporting AI at scale. The second is application: embedding AI into sectors such as healthcare, energy, education, logistics, and smart cities. The third—and most important—is human capability. Organizations need professionals who understand data, governance, deployment, ethics, and operational execution. Without these capabilities, infrastructure investments risk becoming underutilized assets.

Smart Cities Demonstrate AI's Potential

One of the clearest demonstrations of AI value can be found within smart city development. Artificial intelligence enables better decisions around mobility, energy, safety, planning, and quality of life. Yet its effectiveness depends heavily on context. Location and time-based information—spatiotemporal data—provides critical insights into how cities function and where improvements can be made. AI becomes significantly more powerful when it understands where events occur and when they occur. The future of AI competitiveness will therefore depend on more than technology. Nations that combine infrastructure, talent, governance, and practical implementation capabilities will be best positioned to convert AI investment into long-term economic value. ■

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TOP 9 TAKEAWAYS

TALENT CREATES LONG-TERM AI VALUE

Hani Elshafey
AI Researcher, Educator & Trainer, Saudi Arabia

1. Saudi Arabia is developing AI as a national capability through infrastructure investments, sector applications, and long-term talent development initiatives.

2. Cloud infrastructure, data centers, and computing capacity provide the digital backbone required to support AI adoption across industries.

3. AI creates value when embedded into sectors such as healthcare, energy, education, logistics, and smart city operations.

4. Long-term success depends on developing people capable of designing, governing, deploying, and scaling AI responsibly across organizations.

5. Countries investing in AI education and workforce development will capture greater economic value than those focusing solely on technology infrastructure.

6. Training programs should prioritize practical implementation skills that help organizations move from experimentation toward scalable deployment.

7. Smart cities demonstrate how AI can improve mobility, safety, planning, service delivery, and quality of life through intelligent decision-making.

8. Location and time-based data provide powerful context that helps governments and businesses make better operational and strategic decisions.

9. Successful AI implementation requires coordinated investments across infrastructure, governance, talent, platforms, and sector-specific applications.

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"Saudi Arabia is building AI not simply as a technology initiative but as a long-term national capability and economic enabler."

Hani Elshafey
AI Researcher, Educator & Trainer
Saudi Arabia

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"AI becomes significantly more powerful when it understands location, timing, and context behind decisions affecting citizens and infrastructure."

Hani Elshafey
AI Researcher, Educator & Trainer, Saudi Arabia

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Jay Sadiq
Founder & CEO
FortyGuard

The Future Belongs to Trusted Intelligence

The AI economy is often described as a race for data, infrastructure, and computational power. Yet the next phase of competition may be defined by something far more important: the ability to transform information into trusted intelligence. Possessing data is no longer enough. Organizations and nations increasingly need systems capable of validating, contextualizing, and operationalizing information in real time. Competitive advantage will come not from ownership alone, but from the ability to generate decisions, actions, and outcomes from trusted intelligence ecosystems. This shift represents a fundamental evolution in how countries should think about AI competitiveness. Nations that fail to organize and mobilize their sovereign data assets risk becoming dependent on intelligence systems built elsewhere.

Governance Must Become an Enabler

Governance is frequently viewed as a compliance exercise. In reality, governance should function as an operating system for innovation. Effective governance frameworks create confidence, accountability, and collaboration. They establish the conditions that allow organizations to share information securely, deploy AI responsibly, and scale innovation without sacrificing trust. Rather than slowing progress, governance should accelerate it by providing clear rules that enable participation across sectors.

Infrastructure Without Utilization Creates No Value

The global AI race has triggered unprecedented investments in data centers, cloud infrastructure, and computing resources. Yet infrastructure alone does not create competitiveness. Economic value emerges only when organizations actively deploy intelligent systems that solve real-world challenges. Capacity sitting idle contributes little to national productivity or innovation. The countries that lead the next era of AI will not simply be those with the largest infrastructure footprints. They will be those capable of combining trusted data, strong governance, affordable energy, skilled talent, and scalable deployment into a cohesive national ecosystem. Ultimately, the future belongs not to those who collect the most data, but to those who create the most trusted intelligence. ■

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TOP 9 TAKEAWAYS

INDUSTRIALIZING INTELLIGENCE AT SCALE

Jay Sadiq
Founder & CEO, FortyGuard

1. Competitive advantage comes not from possessing data alone but from converting data into trusted intelligence and actionable outcomes.

2. Countries that fail to mobilize sovereign datasets risk becoming consumers of intelligence systems developed elsewhere.

3. Governance should function as an operating system that facilitates collaboration, accountability, and responsible innovation rather than creating bureaucracy.

4. Large data volumes alone are insufficient. Competitive advantage depends on trusted, labeled, validated, and continuously updated datasets.

5. Real-time and continuously refreshed data enables more effective decision-making than static information repositories.

6. Future competitive advantage will increasingly depend on ownership of feedback loops connecting users, organizations, governments, and AI systems.

7. Organizations should move beyond binary approaches to data sharing and focus on frameworks that create collective value securely.

8. Infrastructure alone does not generate competitiveness. Economic value emerges only when AI capabilities are actively deployed and utilized.

9. The next AI superpowers will combine sovereign data, affordable energy, advanced infrastructure, trusted deployment channels, and world-class talent ecosystems.

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"The next monopoly will not be data ownership alone, but ownership of feedback loops connecting governments, enterprises, citizens, and AI systems."

Jay Sadiq
Founder & CEO, FortyGuard

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SOUNDINGS

"Governance should function as an operating system for innovation, creating confidence, accountability, and the conditions necessary for responsible AI adoption."

Jay Sadiq
Founder & CEO, FortyGuard

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