

strategy&

Part of the PwC network

**IDEATION
CENTER INSIGHT**

Can AI read the room? Predicting policy sentiment with synthetic personas

Evidence from the Middle East



Contacts

Dubai

Dima Sayess
Partner
+971-4-436-3000
dima.sayess
@strategyand.pwc.com

Fatima Koaik
Principal
+971-50-701-8240
fatima.koaik
@strategyand.pwc.com

The Ideation Center

The Ideation Center is the mission lab of Strategy& Middle East, part of the PwC network. With origins as one of the region's most prominent think tanks, we partner with governments, businesses, and leading academic institutions to tackle complex challenges and shape the future. Through actionable foresight, innovation as a service, behavioral economics, impact evaluation, and advanced data analytics, we help organizations anticipate change, test new ideas, build transformative capabilities, and scale solutions that create lasting impact. Bringing together diverse expertise from across disciplines, we combine bold thinking with practical action to drive impact across society, the economy, and the environment. For more info, visit our website on: <https://www.strategyand.pwc.com/m1/en/ideation-center.html>

ABOUT THE AUTHORS

Dima Sayess is a partner with Strategy& Middle East, part of the PwC network, and director of the Ideation Center, the leading think tank for Strategy& Middle East. She has more than 20 years of experience in public-sector consulting, with a focus on innovation in policymaking, government of the future, and quality of life. She formerly served as an advisor to the minister of finance and education in Lebanon, and the Executive Council of Dubai.

Dr. Fatima Koaik is behavioral economics director at the Ideation Center, where she works at the intersection of applied research and consulting. She completed her Ph.D. in the Psychology and Behavioural Science Department at London School of Economics and Political Science (LSE), led the establishment of several behavioral units, and has conducted more than 50 experiments. Her previous experience includes working as a behavioral scientist at the World Bank's Mind, Behavior and Development Unit and at the United Nations Development Programme.

Dr. Robin Schinder is behavioral economist manager at the Ideation Center, where he conducts experiments and evidence-based research and advises clients and policymakers on strategic challenges. He previously worked as a postdoctoral researcher at the University of Zurich, where he earned his Ph.D. in management and economics, applying methods of experimental economics to various topics such as corporate social responsibility, legitimacy, and prosocial behavior.

Pujen Shrestha is senior behavioral and data scientist at the Ideation Center, where he applies behavioral science to policy challenges in the Middle East. His work includes designing and implementing behavioral experiments related to entrepreneurship, labor participation, and consumer behavior. Previously, he was a behavioral science researcher at the Behavioural Insights Team in the United Kingdom.

Dr. Dario Krpan is associate professor of behavioral science in the Department of Psychological and Behavioural Science at LSE and is affiliated with the school's Data Science Institute. He completed an M.Phil. and a Ph.D. in psychology at the University of Cambridge. His research focus is transformative behavioral change—how individuals can adapt their lifestyles to address some of the world's most pressing challenges, including climate change and the rise of AI.

George Philippe Farajalla also contributed to this report.

EXECUTIVE SUMMARY

For policymakers, understanding how the public is likely to respond to a new or reformed policy is crucial to that policy's successful implementation and uptake. Yet measuring policy sentiment through surveys and experiments is often slow, costly, and challenging to scale—especially when the room that policymakers are trying to read is an entire country. The burgeoning field of generative AI presents a new approach to this persistent challenge through the use of synthetic personas.

Synthetic personas are artificial entities generated by large language models (LLMs) to simulate human responses. Studies have found that they can mimic human decision-making with a moderate to high degree of accuracy, and they offer a tool for exploring public responses when traditional approaches are constrained by time, cost, or feasibility. Now, Strategy&'s Ideation Center has extended this research for Middle East policymakers by studying the ability of synthetic personas to predict policy sentiment in three Gulf countries.

Our study found that agreement between human and synthetic persona responses exceeded 90 percent for most LLM model configurations. GPT-4o showed the best performance, generating synthetic responses that were strongly correlated with human responses across multiple policy domains in all three countries. While synthetic personas captured the overall direction of public opinion well, their responses were more concentrated around similar views and underrepresented the variation and more extreme opinions observed among real respondents.

These results support three recommendations for Middle East policymakers. First, they can use synthetic personas in the preliminary testing of public receptiveness to prospective policies, enabling the screening of potentially sensitive policies. Second, they can use synthetic personas to produce valuable early-stage insights even when detailed demographic data on the desired groups of people is unavailable or when resources needed to collect such data are limited; the use of synthetic personas in those cases can support faster policy cycles that are more responsive to public needs. Third, they should not rely on synthetic personas to predict the full variability or distribution of public opinion.

THE CHALLENGING MANDATE OF MEASURING PUBLIC SENTIMENT IN POLICYMAKING

Understanding how the public perceives government policies before they are enacted and implemented is a perennial mandate for policymakers. This mandate is becoming more urgent in the Gulf countries, where governments are striving to develop policies under tight time lines, address socially sensitive issues, and offer expanded opportunities for public participation. To meet these challenges, policymakers need tools that can predict public reactions quickly, accurately, and at scale. New research conducted under the auspices of Strategy&'s Ideation Center finds that large language models (LLMs) offer policymakers in the Middle East such a tool.

Measuring public attitudes in advance is essential for anticipating the social acceptance of, compliance with, and long-term effectiveness of new and reformed policies. Until recently, policymakers have relied on surveys and experiments to measure population-level sentiment. However, these tools have significant drawbacks. They usually require substantial time and financial resources. The representative samples they depend upon can be difficult to assemble. Moreover, the public exploration of policy topics is sometimes constrained by political sensitivities or regulatory restrictions. This set of obstacles has limited policymakers' ability to iteratively test and refine policy designs on the basis of public attitudes.

Shortly after generative AI went mainstream with the debut of ChatGPT in 2022, an innovative new possibility for understanding public attitudes—synthetic personas—emerged.¹ Synthetic personas are artificial entities generated by LLMs that can simulate human responses to surveys and experiments. As LLMs continue to be trained on the vast corpora of human knowledge, they are increasingly able to produce synthetic personas capable of replicating human responses with moderate to high accuracy across a variety of domains.

In the domain of politics, studies have found that synthetic personas can approximate public views on various topics and voting outcomes. For example, research conducted in countries including Chile, Saudi Arabia, the United Arab Emirates (UAE), and the United States showed that synthetic personas can, on average, replicate human opinions on sociopolitical topics as diverse as sustainability and trust in government.² With respect to voting outcomes, synthetic personas successfully predicted the result of the 2024 presidential election in the United States.³

Although these studies found that synthetic personas tend to be reasonably accurate in predicting average public opinion and voting patterns, they also found that synthetic personas often fail to capture the full variability found in human samples. Results improve when researchers go beyond simple demographics-based prompts (such as asking an LLM to answer survey questions as a 45-year-old man from Texas would). More advanced methods, such as fine-tuning models on large-scale survey datasets or constructing personas from richer qualitative datasets that capture real people's backgrounds and experiences, produced responses that more reliably replicated human distributions. In short, studies collectively suggest that synthetic personas can approximate high-level opinion trends and electoral patterns, and that using richer data or more advanced techniques may further improve the similarity between human and synthetic responses.

Despite the rapidly growing body of research on synthetic personas, one notable area for policymakers has been largely unexplored: whether they can accurately predict people's views on concrete policy proposals. Indeed, with the exception of climate policies, studies that have examined synthetic personas in the domain of public opinion have generally focused on broad sociopolitical attitudes rather than on specific policies.⁴

Strategy&'s Ideation Center sought to answer the above question (whether synthetic personas can accurately predict people's views on concrete policy proposals) for policymakers in the Middle East by conducting a rigorous quantitative study. The study revealed that by enabling accurate simulations of people's views and psychological states in a rapid, scalable, and low-cost manner, synthetic personas offer a novel and effective tool for the region's policymakers.



“

Despite the rapidly growing body of research on synthetic personas, one notable area for policymakers has been largely unexplored: whether they can accurately predict people's views on concrete policy proposals.

DESIGNING THE USE-CASE STUDY

Our study was designed to quantitatively assess the ability of synthetic personas to replicate people's views on both existing and prospective policies in the Middle East.⁵ To do so, it compared the responses of a sample of more than 1,000 people, divided nearly equally among Qatar, Saudi Arabia, and the UAE, to the responses of synthetic personas generated by four LLMs (GPT-4o, GPT-5, DeepSeek-V3.2-Chat, and DeepSeek-V3.2-Reasoner). Using multiple LLMs enabled us to assess robustness across model families.

The study design also enabled systematic comparisons of synthetic personas based on the amount of information used to construct them. We generated three types of synthetic personas using prompts with increasing levels of participant information:

- Generic personas, generated using only nationality with no individual-level data
- Basic personas, generated using nationality and core demographic characteristics such as age, gender, and household income
- Extended personas, generated by incorporating additional qualitative traits such as personal values, aspirations, and views

The policies included in the study spanned five domains: environmental sustainability and climate action; national identity and cultural heritage; innovation, technology, and AI; financial literacy and economic empowerment; and health and well-being (see *Exhibit 1, page 7*). A pool of 60 existing and prospective policies was assembled (10 existing and 10 prospective for each of the three countries). We chose existing policies that are currently implemented, recognizable and relevant to the general population, and sufficiently diverse to reflect the breadth of government activity across social, economic, technological, environmental, and cultural areas.⁶ We created prospective policies that reflect realistic government priorities, address identifiable challenges, are concrete enough for meaningful evaluation, and represent a variety of policy instruments and mechanisms.

Each human respondent and synthetic persona was given 20 policies (10 existing and 10 prospective) according to their nationality. They were asked to evaluate each policy using a seven-point Likert scale.

Existing and prospective policies were rated across several dimensions, including public support, perceived importance, expected compliance, and alignment with public expectations and values.

THE CHALLENGING MANDATE OF MEASURING PUBLIC SENTIMENT IN POLICYMAKING

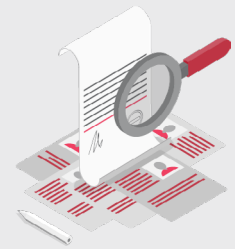
The experiment in numbers



1,000+
respondents



3 GCC countries:
UAE, Saudi Arabia,
and Qatar



60
policies tested



5
policy domains



4
leading AI
models evaluated



**3 types of
synthetic personas**
(Generic, Basic, Extended)

EXHIBIT 1

Policy Domains and Representative Policy Themes Included in the Study

Policy Domain	 United Arab Emirates	 Saudi Arabia	 Qatar
Environmental Sustainability and Climate Action	Public transport integration, low-carbon transport, marine plastic recycling	Green transition, public transport expansion, reforestation, aquifer management	Transport modernization, renewable energy expansion, environmental protection, water governance
Health and Wellbeing	Health insurance, child safety, elderly support, mental wellness	Preventive health, child protection, workplace mental health	Primary healthcare, child and family development, health investment, value-based healthcare
National Identity and Cultural Heritage	Emiratization, cultural heritage preservation, artisan development, traditions apprenticeship	Tourism development, Saudization, cultural innovation, heritage mentorship	Tourism promotion, museums and heritage preservation, Qatarization, cultural heritage digitization
Innovation, Technology, and AI	Digital government, innovation ecosystem, entrepreneurship, smart urban management	Digital transformation, quantum computing, AI-enabled public services	Digital inclusion, technology talent attraction, data modernization
Financial Literacy and Economic Empowerment	Talent attraction, housing support, labor market modernization, consumer financial protection	Women's empowerment, housing, premium residency, domestic manufacturing, investment literacy	Education access, disability inclusion, pension reform, asset management and fund governance

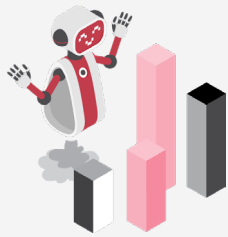
Source: Dario Krpan et al., "Synthetic Policymaking"

SIGNIFICANT FINDINGS FOR POLICYMAKERS

The responses of the synthetic personas were analyzed and compared with those of humans using a set of complementary indicators. These indicators included directional agreement (i.e., whether humans and synthetic personas evaluated each policy in the same overall direction, such as support, neutrality, or opposition); aggregate correlations across policies (i.e., how strongly synthetic and human responses aligned in the relative ordering of policies when comparing average ratings across items); and distributional similarity (i.e., how closely the overall distribution and variability of synthetic responses matched the distribution of human responses). The analyses revealed that synthetic personas can provide scalable insights on human policy views in the Middle East. More detail on the questions analyzed is below.

- **Do the policy evaluations of humans and synthetic personas exhibit directional agreement?** For each policy, we calculated the average response and its 95 percent confidence interval for human participants and synthetic personas. We then used these confidence intervals to classify the responses in one of three regions: “low” (reflecting disagreement or opposition); “middle” (reflecting neutrality); or “high” (reflecting agreement or support). For instance, if an item fell into the same region or combination of regions for both the human sample and a given synthetic sample, we classified the responses as directionally aligned for that item. We found that the responses of human and synthetic personas were directionally aligned across LLMs and policy types most of the time. Moreover, for most synthetic persona configurations, this directional agreement exceeded 90 percent.
- **Do the average policy responses of synthetic personas exhibit a strong aggregate correlation with the responses of humans?** To compute aggregate correlations (the relationship between the average human and synthetic persona responses across policies), we first calculated the mean human response and the corresponding mean response from the synthetic personas for each policy item. We then computed Pearson correlations across these policy averages to assess how closely the pattern of synthetic responses matched the pattern of human responses. The aggregate correlations were strong to medium. The best-performing model was GPT-4o, which produced strong correlations (>0.5) across all policies in each of the three countries.
- **Do the policy responses for synthetic personas exhibit a range that is similar to the policy responses of humans?** To measure the range of responses between humans and synthetic personas for each policy, we computed two complementary measures of distributional similarity: Jensen-Shannon Divergence (JSD) and Earth Mover’s Distance (EMD).⁷ We found large discrepancies between human and synthetic persona variances, indicating that synthetic personas consistently failed to reproduce the diversity and shape of human response distributions across the three countries.⁸ Moreover, these discrepancies were observed for synthetic personas on all three levels (generic, basic, and extended personas), as well as across the different LLMs.

Key findings:



AI predicted public policy sentiment with **over 90% directional accuracy**.



GPT-4o showed the closest match to human responses.



The findings held across **60 policies** and **three GCC countries**.



Simple personas were nearly as effective as detailed profiles.



AI captured overall sentiment more effectively than the diversity of public opinion.



Synthetic personas can accelerate evidence-based policymaking.



Synthetic personas are well suited for early-stage policy testing and screening.



Human engagement remains essential where understanding differences across population groups is required.

THREE RECOMMENDATIONS FOR POLICYMAKERS

Our study yielded the following recommendations for policymakers and practitioners in the Middle East:

Use synthetic personas in the preliminary testing for public receptiveness of prospective policy

Our study demonstrates that synthetic personas can reliably indicate how people perceive policies. Across policies, responses from synthetic personas strongly covaried with those of human participants and moved in the same direction. This suggests that GPT-based synthetic personas can be useful for preliminary testing of policy ideas and for providing indicative insights in situations where collecting human data is neither feasible nor practical. However, because accuracy may not be the same across all LLM models and because synthetic personas produce less variation in responses than real people, their use should not replace direct engagement with citizens and should be complemented with human testing if possible.

When generating synthetic personas, do not be overly concerned with data richness or detailed prompts

Our study showed only modest differences between synthetic personas that were generated using generic prompts and data and synthetic personas generated using more detailed data and sophisticated prompts. For policy support, GPT-4o in particular performed exceptionally well with generic prompts, achieving perfect directional alignment. This indicates that policymakers can obtain valuable early-stage insights even when detailed demographic data on the desired groups of people is unavailable or when the resources needed to collect such data are limited

Do not expect synthetic personas to capture the full distribution of human perspectives

Our study indicates that distributional similarity is the weakest area across all models and prompting strategies. Thus, when using synthetic personas generated through prompting-based approaches like ours, policymakers should remember that the responses of these entities are consistently narrower and less variable than human responses. In practice, this means that synthetic personas can be useful for identifying broad patterns in whether people are likely to support or oppose a policy, but they are less reliable for understanding the full diversity of public opinion. Distributional accuracy becomes particularly important when policymakers need to identify how views differ across groups or estimate how many people strongly support or oppose a policy. In such cases, human data collection remains essential, and synthetic personas should not be relied upon to estimate the full variability or distribution of public opinion.

What AI can do and cannot do



What AI can do

- Predict overall policy support and opposition.
- Rapidly test policy concepts before implementation.
- Generate early-stage directional insights.
- Support faster and more iterative policy design cycles.
- Provide indicative sentiment analysis when survey data is unavailable.
- Help prioritize which policies warrant deeper public consultation.



What AI cannot do

- Capture the full diversity of public opinion.
- Replace citizen engagement and consultation.
- Reliably identify minority or niche perspectives.
- Fully replicate the variability of human responses.
- Estimate how strongly different groups support or oppose a policy.
- Serve as a substitute for representative survey research in high-stakes decisions.



CONCLUSION

As the Gulf becomes ever more central to the global economy and as policymaking in the region becomes increasingly complex and sensitive, policymakers should find the results of our study encouraging, for several reasons. First, the study shows that synthetic personas generated by LLMs can be a valuable tool for understanding public sentiment in the early stages of policymaking for a wide range of policies in the region. Second, it offers concrete guidance for using synthetic personas in real-world applications. Third, it demonstrates that complex prompting and rich datasets are not required to generate synthetic personas capable of simulating human policy views. Indeed, synthetic personas can be generated quickly and inexpensively using off-the-shelf LLMs. Surveys and experiments continue to be important tools for understanding how people perceive and respond to policies, but when time and funding are tight, Middle East policymakers can rely on synthetic personas.

ACKNOWLEDGMENTS

To learn more about the study described in this viewpoint, see “Synthetic Policymaking: Using LLM-Generated Personas to Predict Public Views on Existing and Prospective Policies in non-WEIRD Countries.”⁹ The study was developed by the Strategy& Ideation Center’s Behavioral Science Unit in partnership with experts at the London School of Economics and Political Science and behavioral science practitioners from Saudi Arabia. It was fully funded by Strategy&’s Ideation Center. To learn more about the efforts of the Ideation Center in promoting evidence-based public policy in the MENA region, visit www.ideationcenter.com.

APPENDIX

Existing Policies

Policy Domain	 United Arab Emirates	 Saudi Arabia	 Qatar
Environmental Sustainability & Climate Action	Public transport integration, low-carbon transport, marine plastic recycling	Green transition, public transport expansion, reforestation, aquifer management	Transport modernization, renewable energy expansion, environmental protection, water governance
Health & Wellbeing	Health insurance, child safety, elderly support, mental wellness	Preventive health, child protection, workplace mental health	Primary healthcare, child and family development, health investment, value-based healthcare
National Identity & Cultural Heritage	Emiratization, cultural heritage preservation, artisan development, traditions apprenticeship	Tourism development, Saudization, cultural innovation, heritage mentorship	Tourism promotion, museums and heritage preservation, Qatarization, cultural heritage digitization
Innovation, Technology & AI	Digital government, innovation ecosystem, entrepreneurship, smart urban management	Digital transformation, quantum computing, AI-enabled public services	Digital inclusion, technology talent attraction, data modernization
Financial Literacy & Economic Empowerment	Talent attraction, housing support, labor market modernization, consumer financial protection	Women's empowerment, housing, premium residency, domestic manufacturing, investment literacy	Education access, disability inclusion, pension reform, asset management and fund governance



United Arab Emirates

Golden Visa Program (Policy Theme: Financial Literacy and Economic Empowerment)

A long-term residency program that offers five- or 10-year visas to skilled professionals, entrepreneurs, investors, scientists, and creative talents, without requiring a UAE sponsor. Eligibility depends on factors such as strong academic credentials (e.g., Ph.D. or top university graduates), significant investments (typically AED 2 million+), or notable achievements in areas like artificial intelligence, medicine, arts, sports, and innovation. The visa allows holders to live, work, and study in the UAE, sponsors their families, and includes priority benefits such as ease of renewal and the ability to stay abroad without losing residency.

Federal Decree-Law No. 48 of 2023 on Mandatory Health Insurance (Policy Theme: Health and Well-being)

A law that makes health insurance mandatory for everyone living in the UAE. It requires employers to provide at least a basic health insurance plan for their employees. The system also uses digital health records and a centralized process for handling insurance claims to improve efficiency and reduce fraud.



Saudi Arabia

Vision 2030 Women's Empowerment Initiatives (Policy Theme: Financial Literacy and Economic Empowerment)

A suite of reforms under Saudi Vision 2030 that aims to empower women and enhance their social and economic participation. Key elements include allowing women over 21 to obtain passports, travel, and access services without a male guardian's permission, and granting full driving rights since 2018. The initiatives also support female entrepreneurs through incubators, mentorship, and access to funding.

Sakani Housing Program (Policy Theme: Financial Literacy and Economic Empowerment)

A government-led initiative introduced in 2017 to help Saudi families own homes. The program partners with private developers and banks to offer financial assistance, mortgage options, and ready-to-move or off-plan housing projects. People can use the Sakani platform to reserve homes, access subsidized loans, and complete contracts electronically.



Qatar

Qatar National Tourism Sector Strategy (Policy Theme: National Identity and Cultural Heritage)

A policy to boost visitor numbers by promoting Qatar as a destination for sports, business, and cultural tourism. It builds on modern infrastructure and international visibility from events such as the FIFA World Cup 2022 and includes efforts to expand hospitality, develop attractions, and host global conferences and festivals.

Qatar National Transport Master Plan (Policy Theme: Environmental Sustainability and Climate Action)

A plan to modernize Qatar's transportation system by introducing more electric buses, expanding the metro network, and adding safe cycling lanes. It promotes technology (e.g., mobile apps and electric vehicles) to make travel more efficient, environmentally friendly, and accessible for all residents.

 United Arab Emirates**Emiratization Program (Policy Theme: National Identity and Cultural Heritage)**

A national initiative that requires private companies to hire a certain number of Emirati citizens, especially in sectors like finance, technology, and healthcare. The program supports this by offering salary support, training opportunities, and simplified hiring processes to encourage businesses to employ more UAE nationals.

 Saudi Arabia**Saudi Green Initiative (Policy Theme: Environmental Sustainability and Climate Action)**

An environmental initiative aimed at making Saudi Arabia carbon-neutral by planting 10 billion trees, expanding renewable energy, and restoring and protecting natural land areas. It includes large-scale afforestation, deployment of clean energy like solar and wind, rehabilitation of degraded lands, and conservation of wildlife and protected zones.

 Qatar**Education Above All Initiatives (Policy Theme: Financial Literacy and Economic Empowerment)**

National and international programs led from Qatar that aim to keep all children in school, reduce dropout rates, and teach global citizenship values. The initiatives include scholarships and funding for inclusive education tools and technologies, often delivered with ministries, universities, and aid organizations.

UAE Digital Government Strategy (Policy Theme: Innovation, Technology, and AI)

A coordinated government-wide effort to digitize public services, integrate tools for citizen feedback, and use technologies like AI and blockchain in government operations. Includes a secure, unified app (UAE Pass) that allows people to access a wide range of government services online.

Saudi Tourism Strategy (2030) (Policy Theme: National Identity and Cultural Heritage)

A national plan under Vision 2030 to turn Saudi Arabia into a leading global tourism destination. It supports development of major projects such as NEOM, Al-Ula, and the Red Sea destination; simplifies visa processes; and restores cultural and historical sites, aiming to welcome over 100 million visitors annually by 2030.

Primary Health Care Strategy (Policy Theme: Health and Well-being)

A national plan to strengthen community health by opening new neighborhood health centers, offering online and phone consultations, and improving long-term care through continuous relationships with family physicians. It emphasizes early detection and prevention, and focuses on managing chronic conditions such as diabetes and hypertension.

Sheikh Zayed Housing Programme (Policy Theme: Financial Literacy and Economic Empowerment)

A government program that helps Emirati citizens get affordable homes by offering low-interest housing loans, free plots of land, or ready-built houses. Applications are submitted through a digital platform, and priority is given to large families and those with lower incomes.

Saudization (Nitaqat) (Policy Theme: National Identity and Cultural Heritage)

A system that ranks private companies based on how many Saudi nationals they employ, aiming to boost local job opportunities. Higher-ranked companies receive benefits (e.g., faster visa approvals), while low-ranking firms face restrictions. The program applies quotas tailored to company size and industry and encourages firms to train Saudi workers.

Policy for People with Disabilities (Policy Theme: Financial Literacy and Economic Empowerment)

A policy requiring public and private employers to make workplaces accessible (e.g., with ramps, adjusted desks, accessible websites and software) and encouraging inclusive hiring. It includes regular checks and inspections to ensure compliance, along with enforcement measures if rules are not followed.

 United Arab Emirates**Integrated Public Transport Plan
(Policy Theme: Environmental Sustainability and Climate Action)**

A plan that brings together Dubai's metro, tram, bus, and water taxi services into one unified network with a single smart ticketing system (like the Nol Card). The plan supports development of neighborhoods around transit stops and improves last-mile connections, such as bike lanes, pedestrian paths, and feeder buses.

 Saudi Arabia**Public Transport Expansion Initiative (Policy Theme: Environmental Sustainability and Climate Action)**

An initiative under Vision 2030 to expand and modernize public transportation, including metro networks (such as the Riyadh Metro), bus rapid transit, and high-speed intercity rail. It also includes features to improve safety and accessibility, with the goal of making public transport more efficient, inclusive, and environmentally sustainable.

 Qatar**National Environment and Climate-Change Strategy (Policy Theme: Environmental Sustainability and Climate Action)**

A strategy focused on improving air and water quality, protecting desert landscapes and native wildlife, and promoting eco-friendly planning. Major development projects must include environmental impact assessments. It supports mapping ecosystems, creating protected areas, and building green spaces and climate-controlled parks.

Children's Safety Policy (Policy Theme: Health and Well-being)

A national policy that establishes hotlines for reporting child abuse; systems to track and manage child protection cases; and legal requirements for teachers, doctors, and others to report suspected abuse. It also includes programs to support parents and protect children online.

Saudi Digital Transformation Program (Policy Theme: Innovation, Technology, and AI)

A national initiative to modernize government services using digital tools. It includes moving government systems to the cloud, creating open data portals, and using automation such as chatbots and AI to improve service delivery. The program also prioritizes cybersecurity and collaboration between government, technology companies, and research institutions.

Qatar Museums and Heritage Authority (Policy Theme: National Identity and Cultural Heritage)

A policy supporting preservation and promotion of Qatari culture through restoration of heritage sites, museum development, and public cultural programs. Implemented by Qatar Museums, it includes partnerships to expand access to culture, support archaeology, and engage communities in Qatar's artistic and historical legacy.

Federal Decree-Law No. 33 of 2021 on Regulation of Labor Relations (Policy Theme: Financial Literacy and Economic Empowerment)

A decree that overhauled the UAE's private-sector labor law to modernize working conditions by introducing flexible work options. The reform strengthened protections against workplace discrimination and harassment, clarified rules on fair termination and notice periods, and ensured that part-time and remote workers would receive the same basic rights and benefits as full-time employees.

Premium Residency Program (Policy Theme: Financial Literacy and Economic Empowerment)

A residency option for expatriates that allows them to live, work, and own property in Saudi Arabia without needing a local sponsor. It includes different categories and options for either a renewable one-year residency or a longer-term permanent residency, with rights to own real estate, cars, and businesses.

Qatarization Program (Policy Theme: National Identity and Cultural Heritage)

A policy requiring key industries to employ a minimum percentage of Qatari nationals, supported through scholarships, structured career pathways, training and mentoring, and services that match citizens to specialized roles.



United Arab Emirates

UAE Innovation Strategy (Policy Theme: Innovation, Technology, and AI)

A national plan to encourage innovation across government services, education, healthcare, and energy. It includes annual innovation awards to recognize creative ideas, funding for research and development, and partnerships that link universities with businesses to develop new technologies.

Cultural Heritage and Arts Program (Policy Theme: National Identity and Cultural Heritage)

A program that supports the preservation and celebration of Emirati culture by funding traditional music, dance, crafts, and national museums. It also invites young people to learn and participate in cultural crafts. The program features traveling heritage exhibitions that move between emirates and cultural weeks in schools to engage students.



Saudi Arabia

Child Protection Law (Policy Theme: Health and Well-being)

A law that protects children under 18 from abuse, neglect, and exploitation. It defines abuse, specifies penalties, and creates a system requiring agencies (social services, health, education, police) to coordinate responses when children are at risk. It also mandates training for professionals who are in regular contact with children.

Made in Saudi Program (Policy Theme: Financial Literacy and Economic Empowerment)

A national branding and export-strengthening initiative that supports domestic manufacturers through the “Made in Saudi” label, certification and standards, and export readiness guidance. It promotes consumer awareness and national pride in locally made products and helps manufacturers access international markets.



Qatar

Child and Family Development Programs (Policy Theme: Health and Well-being)

Government initiatives that offer low-cost or free childcare, support for parents (parenting classes and home visits), and early screening and help for children showing signs of developmental delay. The programs also run family counseling centers to support child well-being and family relationships.

Qatar Digital Inclusion Strategy (Policy Theme: Innovation, Technology, and AI)

A plan to ensure everyone can access and use digital services, especially people with disabilities. It provides tools such as screen-reading software and voice-activated typing; sets up public internet centers; offers multilingual services; and enforces accessibility standards across public kiosks, ATMs, and online platforms.

Prospective Policies



United Arab Emirates

National Low-Carbon Transport and Fuel Standard (Policy Theme: Environmental Sustainability and Climate Action)

Set national rules requiring transport fuel suppliers to reduce the climate impact of the fuels they sell in the UAE by blending more low-carbon fuels over time, so that by 2030 emissions are at least 20 percent lower. Suppliers must report progress every three months.



Saudi Arabia

Desert Reforestation and Carbon Sequestration Program (Policy Theme: Environmental Sustainability and Climate Action)

Launch large-scale planting of native, drought-tolerant trees across degraded rangelands, supported by community-managed nurseries and revenue-sharing programs that allow communities to earn income from selling carbon credits.



Qatar

National Utility-Scale Renewable Capacity Expansion Scheme (Policy Theme: Environmental Sustainability and Climate Action)

Offer competitive long-term power-purchase agreements alongside tax incentives to attract investment in large-scale wind and solar projects. The goal is to add two gigawatts of renewable energy capacity by 2028.

UAE Marine Plastic Capture and Recycling Program (Policy Theme: Environmental Sustainability and Climate Action)

Require all coastal ports and marinas to install floating plastic capture barriers and partner with certified recyclers. Collected debris will be sorted, processed into feedstock for local manufacturing, and tracked through a digital registry to ensure that usable materials are recycled.

Sustainable Aquifer Management and Recharge Framework (Policy Theme: Environmental Sustainability and Climate Action)

Require all new developments to include managed aquifer recharge systems such as infiltration basins or injection of treated wastewater, with standardized monitoring in place.

National Water Law Formalization and Enforcement (Policy Theme: Environmental Sustainability and Climate Action)

Introduce a comprehensive water law setting rules for water allocation, quality standards, reuse requirements, and permits for extracting water. Establish a dedicated water authority to implement the law, monitor compliance, and resolve disputes.

Elderly Accessibility and Home Support Initiative (Policy Theme: Health and Well-being)

Provide free support to help Emirati seniors make homes and local areas safer and easier to navigate. Seniors can receive a needs assessment from a certified occupational therapist, and approved contractors will carry out upgrades (e.g., ramps, grab bars, wider doorways) at no cost.

National Preventive Health Passport (Policy Theme: Health and Well-being)

Provide every resident with a digital Preventive Health Passport that tracks screenings, vaccinations, and lifestyle checkups. Residents who meet annual prevention goals can receive incentives such as insurance rebates.

Private Insurance Value-Incentive Program (Policy Theme: Health and Well-being)

Require private insurers to offer discounts and added benefits to healthcare providers that meet standardized targets for patient health outcomes.



United Arab Emirates

UAE Community Mental Wellness and Resilience Network (Policy Theme: Health and Well-being)

Launch a national mental health support network that places trained professional and peer-support coordinators in community centers, schools, and workplaces to offer early help, reduce stigma, and normalize mental health support.



Saudi Arabia

Workplace Mental Health Resilience Certification (Policy Theme: Health and Well-being)

Create a voluntary certification for companies implementing best-practice mental health programs such as manager training, on-site counseling, and anonymous support channels, evaluated through annual audits.



Qatar

Qatar Health Investment Acceleration Framework (Policy Theme: Health and Well-being)

Implement reforms to make it easier for private companies to enter and operate in Qatar's healthcare sector, such as a unified digital licensing portal, standardized public-private partnership contracts, and a health-tech sandbox to test new technologies.

National Heritage Microfinance Program (Policy Theme: National Identity and Cultural Heritage)

Offer low-interest microloans to artisans and small businesses reviving traditional crafts, paired with business training and guaranteed opportunities to sell products at official government events and exhibitions.

Saudi Cultural Heritage Innovation Fund (Policy Theme: National Identity and Cultural Heritage)

Launch grants to support citizen-led projects that reimagine traditional crafts using modern design, technology, or social enterprise models.

Qatar Ancestral Heritage Digital Registry (Policy Theme: National Identity and Cultural Heritage)

Launch a secure online platform where Qataris can document family lineage, tribal affiliations, and oral histories, with the option of uploading supporting documents and multimedia.

UAE Flagship Traditions Apprenticeship Network (Policy Theme: National Identity and Cultural Heritage)

Launch a formal apprenticeship scheme connecting experienced master artisans in key Emirati traditions with young apprentices. Apprentices will receive a stipend and accredited certification; masters will receive compensation and support to run workshops.

Intergenerational Heritage Mentorship Scheme (Policy Theme: National Identity and Cultural Heritage)

Pair youth volunteers with elder cultural experts in monthly workshops on local cuisine, music, dance, and other traditional customs. Showcase outputs in community exhibitions and online platforms.

Qataris Abroad Cultural Ambassadors Program (Policy Theme: National Identity and Cultural Heritage)

Appoint Qataris living abroad as cultural ambassadors to lead virtual heritage workshops, storytelling sessions, and live-streamed events connecting communities overseas with those in Qatar.



United Arab Emirates

UAE Emerging Innovators Fellowship (Policy Theme: Innovation, Technology, and AI)

A government-backed fellowship awarding up to 100 early-stage Emirati and resident innovative entrepreneurs per year with stipends, mentorship, and access to prototyping labs. Fellows will commit to developing a minimum viable product within 12 months.



Saudi Arabia

National Quantum Computing Research Consortium (Policy Theme: Innovation, Technology, and AI)

Establish a public-private consortium of universities, defense agencies, and technology companies to develop quantum algorithms, build hardware prototypes, and design workforce training programs.



Qatar

Qatar Digital Talent Attraction Program (Policy Theme: Innovation, Technology, and AI)

Launch an initiative to attract top international technology talent by providing fast-track visas, relocation support, and upskilling grants.

UAE Digital Twin Mandate for Smart Urban Management (Policy Theme: Innovation, Technology, and AI)

Require major urban development and infrastructure projects to build and maintain a real-time digital twin of physical systems, connected to sensors and sending live data to a central platform. This will support continuous simulation to improve energy efficiency, traffic flow, and emergency response planning.

AI-Powered Public Service Accelerator (Policy Theme: Innovation, Technology, and AI)

Launch a fast-track program where government agencies partner with AI startups to codevelop and test AI solutions for public services, supported by seed funding, secure data access, and fast-tracked regulatory approvals.

Qatar National Data and Statistics Modernization Program (Policy Theme: Innovation, Technology, and AI)

Develop a unified, cloud-based platform to manage national data and statistics with rules to ensure accuracy and security. It should include live dashboards and secure APIs for public-sector and private-sector access.

Implementing Strategic Frictions to Curb Unhealthy Financial Decisions (Policy Theme: Financial Literacy and Economic Empowerment)

Apply friction points to promote smarter financial decisions, such as by giving clear warnings about extra costs and requiring active confirmation before users can proceed with potentially harmful choices.

Saudi Banking Behavioral Optimization Initiative (Policy Theme: Financial Literacy and Economic Empowerment)

Require banks to use behavioral design techniques, such as simplified forms, default opt-in settings, real-time prompts, and clearer decision flows, across digital and in-branch services. This will make processes faster and easier for users.

Qatar Asset Manager Enhancement Initiative (Policy Theme: Financial Literacy and Economic Empowerment)

Encourage private savings and expand pension access among Qatari nationals, while offering training and official certification for fund managers to raise quality and trust in fund management.



United Arab Emirates

Mandate Transparent Disclosure of Additional Partial Payment and Installment Fees (Policy Theme: Financial Literacy and Economic Empowerment)

Require clear and repeated disclosure of the extra total cost of minimum credit card payments or installment plans with hidden fees; for example, show how interest increases the total amount paid over time.



Saudi Arabia

Digital Investment Platform Education Mandate (Policy Theme: Financial Literacy and Economic Empowerment)

Require licensed digital investment platforms to include interactive education content such as learning modules, tool tips, and clear risk disclosures explaining core financial concepts and how investment products work.



Qatar

Pension Fund Professional Accreditation and Governance Framework (Policy Theme: Financial Literacy and Economic Empowerment)

Establish mandatory certification, ethical standards, and ongoing training for fund managers, along with regular governance audits to ensure that pension and endowment funds are managed responsibly and transparently.



ENDNOTES

1. Matthew Hutson, “Guinea Pigbots,” *Science*, July 13, 2023 (<https://www.science.org/content/article/can-ai-chatbots-replace-human-subjects-behavioral-experiments>).
2. Pujen Shrestha et al., “Beyond WEIRD: Can Synthetic Survey Participants Substitute for Humans in Global Policy Research?” *Behavioral Science & Policy*, February 8, 2025 (<https://journals.sagepub.com/doi/full/10.1177/23794607241311793>); Bastián González-Bustamante, Nando Verelst, and Carla Cisternas, “Emulating Public Opinion: A Proof-of-Concept of AI-Generated Synthetic Survey Responses for the Chilean Case,” *Empiria Lab*, 2025 (<https://doi.org/10.5281/zenodo.17077752>); James Bisbee et al., “Synthetic Replacements for Human Survey Data? The Perils of Large Language Models,” *Political Analysis*, May 2024 (https://www.researchgate.net/publication/380678289_Synthetic_Replacements_for_Human_Survey_Data_The_Perils_of_Large_Language_Models).
3. Shapeng Jiang, Lijia Wei, and Chen Zhang, “Donald Trumps in the Virtual Polls: Simulating and Predicting Public Opinions in Surveys Using Large Language Models,” arXiv, 2025 (<https://doi.org/10.48550/arXiv.2411.01582>).
4. The exception is Ziqian Xia et al., “Predicting Climate Policy Support with Large Language Models: Assessing Accuracy and Bias in AI-Simulated Policy Support,” SSRN, May 23, 2025 (<https://doi.org/10.2139/ssrn.5266427>).
5. For the full study, see: Dario Krpan et al., “Synthetic Policymaking: Using LLM-Generated Personas to Predict Public Views on Existing and Prospective Policies in non-WEIRD Countries,” OSF, January 11, 2026 (https://osf.io/preprints/psyarxiv/yjudk_v1).
6. Existing policies were included in a pilot to assess whether citizens and residents were already aware of them before the full study was launched.
7. JSD quantifies the divergence between two probability distributions, and EMD quantifies how far apart responses lie on the response scale. In both, lower values indicate higher distribution similarity.
8. This finding is commonplace across studies of synthetic personas. See, for example, Pujen Shrestha et al., “Beyond WEIRD,” and James Bisbee et al., “Synthetic Replacements for Human Survey Data?”
9. Dario Krpan et al., “Synthetic Policymaking: Using LLM-Generated Personas to Predict Public Views on Existing and Prospective Policies in non-WEIRD Countries,” OSF, January 11, 2026 (https://osf.io/preprints/psyarxiv/yjudk_v1).

Strategy&

Strategy& is a global strategy consulting business uniquely positioned to help deliver your best future: one that is built on differentiation from the inside out and tailored exactly to you. As part of PwC, every day we're building the winning systems that are at the heart of growth. We combine our powerful foresight with this tangible know-how, technology, and scale to help you create a better, more transformative strategy from day one.

As the only at-scale strategy business that's part of a global professional services network, we embed our strategy capabilities with frontline teams across PwC to show you where you need to go, the choices you'll need to make to get there, and how to get it right.

The result is an authentic strategy process powerful enough to capture possibility, while pragmatic enough to ensure effective delivery. It's the strategy that gets an organization through the changes of today and drives results that redefine tomorrow. It's the strategy that turns vision into reality. It's strategy, made real.

Read the latest Ideation Center insights



ideationcenter.com

Connect with Strategy& Middle East



twitter.com/strategyandme



linkedin.com/company/strategyandme



strategyand.pwc.com/me

Connect with Strategy&



twitter.com/strategyand



linkedin.com/company/strategyand



youtube.com/user/strategyand

strategy&

Part of the PwC network

www.strategyand.pwc.com/me

© 2026 PwC. All rights reserved. PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see www.pwc.com/structure for further details. Mentions of Strategy& refer to the global team of practical strategists that is integrated within the PwC network of firms. For more about Strategy&, see www.strategyand.pwc.com. No reproduction is permitted in whole or part without written permission of PwC. Disclaimer: This content is for general purposes only, and should not be used as a substitute for consultation with professional advisors.