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# Public- sector governance in the GCC

**A new chapter  
for a new era**



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## ABOUT THE AUTHORS

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## EXECUTIVE SUMMARY

**Public institutions in the Gulf Cooperation Council (GCC)<sup>1</sup> face unprecedented demands, which they must satisfy to maintain public trust and engagement as well as encourage economic activity and growth. Citizens expect seamless, personalized services akin to what they experience in the private sector, businesses need greater agility to compete in today's fast-changing global economy, and political leaders demand rapid support for their bold national visions.**

Existing governance models are designed for more traditional contexts and are ill suited to contend with these and other powerful trends reshaping governance today. What's needed is a new governance architecture that can orchestrate complex ecosystems, drive national ambitions, facilitate innovation partnerships, and deliver citizen-first services at the scale, speed, and adaptability the era demands. In short, public governance across the GCC region is shifting the balance from oversight toward effective orchestration.

Although this shift is meaningful, it is within reach. Governments can build on strong existing foundations to accelerate adoption. With this in mind, we have identified seven critical capabilities that public institutions can further develop, coordinate, and embed to better serve all stakeholders including citizens, businesses, and political leaders. We have also outlined practical steps they can use in leveraging these capabilities to deliver better governance consistently in today's rapidly changing world.






## KEY TRENDS SHAPING GCC GOVERNANCE

Six trends are driving shifts in the Gulf Cooperation Council (GCC) region's governance (see *Exhibit 1*). Many leaders are already anticipating and adapting to these trends, but few have elevated them to the level of strategic importance they now demand if public institutions are to fulfill their mission.

These trends are not just challenges to overcome; they are structural shifts that open new opportunities for policy, regulation, and execution. The task ahead is to build on existing momentum, harness these trends, and accelerate the articulation and delivery of national ambitions. The region needs an agile, data-driven, and collaborative governance architecture that can evolve with these shifts.

### EXHIBIT 1

#### Key trends shaping GCC governance

-  Sector boundaries are converging and being reorganized around “domains” **01**
-  Execution urgency is rising **02**
-  Localization pressures are intensifying **03**
-  Policy and regulations are evolving into iterative, evidence-led cycles **04**
-  Citizens expect personalized, digital-first, seamless services **05**
-  Integrated technology platforms are becoming central to public value creation **06**

Source: Strategy& analysis

## Trend 1: Sector boundaries are converging and being reorganized around “domains”

Across the GCC region, economies are reorganizing into “domains” as activities that once belonged to discrete sectors are now interlocking around shared policies, platforms, data, and infrastructure. Value creation now occurs across traditional sector lines and into arenas where multiple actors interact.

For example, citizens expect to plan and complete their travel reliably and sustainably, whether by car, public transport, or new forms of clean mobility. To serve this mobility domain, governments are integrating charging networks with power grids, embedding transport planning into urban development, and creating unified tariff and ticketing systems that give people affordable and predictable options.

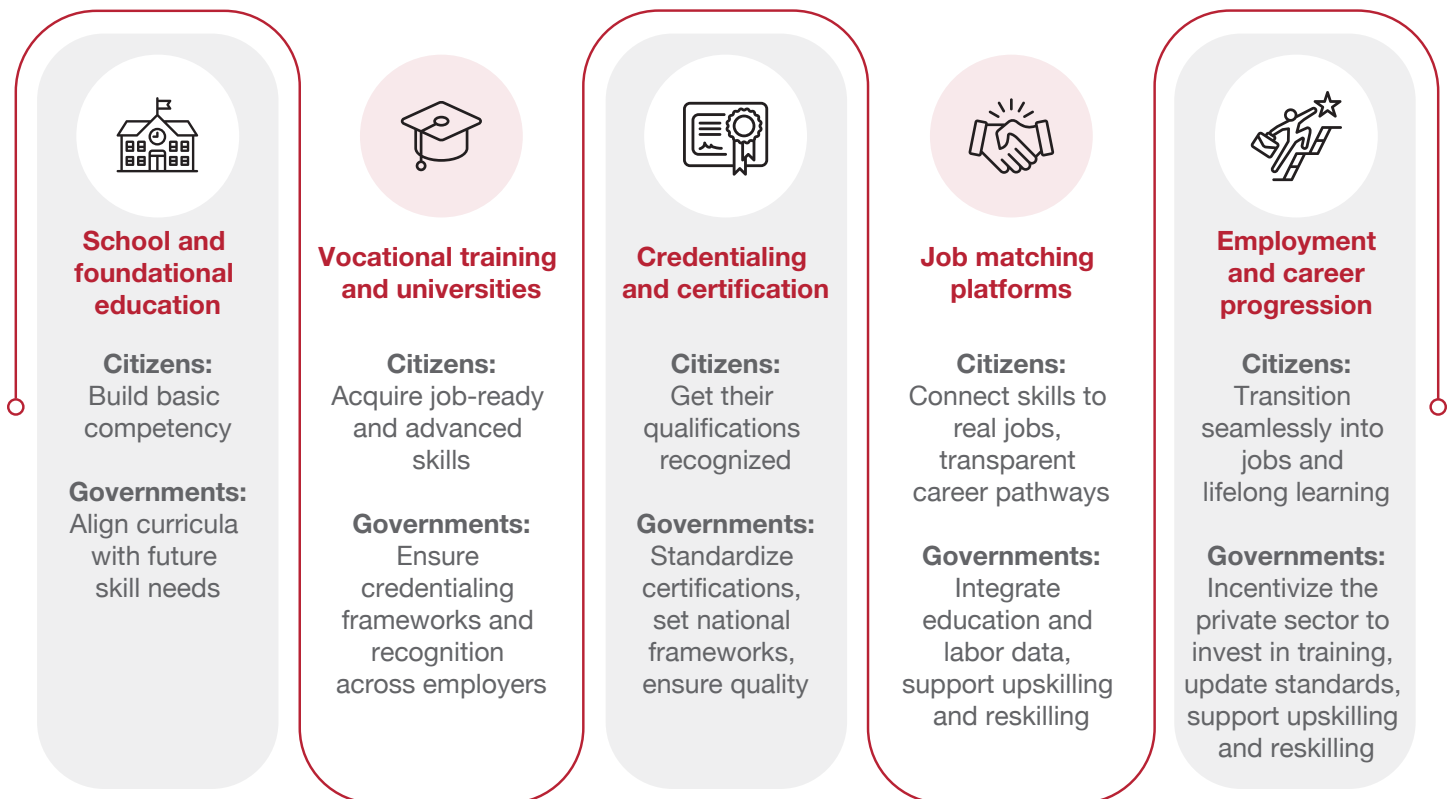
Another example is the skills and employment domain, which facilitates people’s progress from education to the workforce along clear career pathways (see *Exhibit 2*). Governments that want to aid this domain are aligning curricula with labor-market needs, establishing credentialing systems employers recognize, and connecting education and labor databases to expedite job placement.

This shift toward domains means that value chains increasingly encounter ministerial remits. Shared standards and data become foundational, and accountability for outcomes spans agencies and private players. That is, policy, regulation, investment, and delivery must coordinate and ensure accountability rather than operating through isolated verticals.

### EXHIBIT 2

#### Skills and employment

Example of sectors converging into a domain



Source: Strategy& analysis

## **Trend 2: Execution urgency is rising**

Over the past decade, GCC countries have defined ambitious national visions, setting equally ambitious time lines for delivery. External assessments by the Organisation for Economic Co-operation and Development (OECD) note that diversification reforms are advancing, but implementation needs to accelerate to meet targets.<sup>2</sup> The result is that governments are shortening lead times from policy to delivery by using iterative rollouts rather than long handoffs. Reviews and delivery occur in weeks and months rather than years. Leaders have real-time visibility into progress and bottlenecks and the ability to re-sequence work as conditions change. Strong accountability and performance management mechanisms ensure that course corrections are routine rather than exceptional.

## **Trend 3: Localization pressures are intensifying**

People and businesses want services and accountability that are closer to where they live and operate and that are tailored to their specific needs. To satisfy this desire, central governments are empowering regional or sectoral entities by transferring resources and establishing coherent policies, clear accountability, strong performance management, and robust enforcement mechanisms.

Regional plans in cities illustrate the opportunities and risks of this model: They can accelerate delivery and bring government closer to citizens, but only if they remain fully aligned with the national strategy. Cross-sector coordination is equally important. A municipal authority's plans for a new community, for example, will succeed only if education, transport, and health ministries have the budgets and operational readiness to extend their services into that community.

Thus, governments are translating national missions into regional or sectoral projects and targets while retaining oversight to guarantee that all parts of the system pull in the same direction.

## **Trend 4: Policy and regulations are evolving into iterative, evidence-led cycles**

Across geographies and sectors, firms look to the state to help them test, validate, and scale new ideas. Regulators in the GCC region, therefore, now run live testing environments so firms can pilot new ideas. These "sandboxes" make regulatory approvals an iterative cycle (no longer one-off events) that blend regulation, testing, and evidence.

For example, the Central Bank of Bahrain's regulatory sandbox and Saudi Central Bank's regulatory sandbox let companies pilot new fintech models under supervision, which allows regulators to observe risks and benefits before granting full authorization.<sup>3,4,5</sup> Meanwhile, Abu Dhabi's Department of Health provides a regulatory sandbox with access to de-identified data sets so innovators can validate products against real clinical and governance constraints.<sup>6</sup>

## **Trend 5: Citizens expect personalized, digital-first, seamless services**

Across the GCC region, people increasingly judge government services against the best digital experiences they use every day—experiences that are seamless, convenient, fast, transparent, and often personalized. For governments, the stakes are growing to deliver on these expectations as citizens rapidly adopt national digital identity and service platforms. In 2025, the UAE Pass (the United Arab Emirates’ digital ID offering) surpassed 11 million users, while Saudi Arabia’s Absher platform recorded more than 42 million transactions in a single month (May 2025).<sup>7,8</sup>

To deliver these services, governments are rethinking how to structure responsibilities across government. Instead of isolating decision-making for service design, data standards, cybersecurity, and digital identity in separate units, governments are integrating these responsibilities across ministries such that services function as one system. Meanwhile, accountability moves from siloed departmental processes to shared ownership of whole-of-government service outcomes, supported by consistent performance oversight.

Finally, governments are deepening the capabilities that underpin digital service delivery. This includes embedding user-centric design, product management, data governance, and secure digital identity across public entities to develop and improve services on an ongoing basis. These capabilities sit both at the center of government and within sectoral ministries to ensure that digital-first delivery becomes the norm rather than the exception.

## **Trend 6: Integrated technology platforms are becoming central to public value creation**

An integrated technology infrastructure with identity systems, data exchanges, and cloud platforms underpins the service experience and public trust in government. When these elements are weak, citizens face inconsistent records, repetitive paperwork, and low confidence in automated decisions. When they are robust—reliable, interoperable, reusable, traceable, resilient, and trustworthy, with strong cybersecurity and robust governance—governments can deliver proactive services, ensure in-process transparency, and minimize duplication across channels.

As governments build out these integrated platforms, they are increasingly harnessing artificial intelligence (AI) and advanced data intelligence to create a “government brain”—a system that links national identity, data exchange, and cloud infrastructure to generate insights and guide adaptive decision-making. Research shows that embedding AI in the public sector isn’t simply a matter of automating tasks. It enables governments to use data and systems effectively to detect emerging patterns, allocate resources proactively, and adjust policies dynamically. The result is decision-making that is timely, evidence-based, and tailored to evolving citizen needs.








## CAPABILITIES POWERING THE MODERN PUBLIC GOVERNANCE ARCHITECTURE

Taken together, these six trends show how governments are starting to orchestrate outcomes and partner in innovation efforts rather than just regulating activity. Powering this new approach to governance are seven critical capabilities (see *Exhibit 3*). Many of these capabilities are already visible in GCC initiatives (see *Exhibit 4, page 15*). The novelty is bringing them together into one integrated system.

The result is an architecture for the next decade of governance in the region: an operating model that enables governments to move from strategy to measurable outcomes faster, to integrate across sectors and regions, to localize delivery without losing coherence, to integrate innovation and private capital responsibly, and to sustain trust in an era defined by data, digital platforms, and AI.

### EXHIBIT 3

#### Capabilities powering the modern public governance architecture

	<b>Mission-oriented priorities</b>	This capability structures national priorities around bold, measurable national missions that cut across institutions and sectors	<b>01</b>
	<b>Domain governance platforms</b>	This capability organizes delivery through cross-sector ecosystems that coordinate actors, resources, and systems within domains	<b>02</b>
	<b>Agile sandbox labs</b>	This capability embeds experimentation and iteration through sandboxes, agile teams, and policy labs	<b>03</b>
	<b>Trustworthy infrastructure for digital services</b>	This capability provides the secure identity, data, cloud, cybersecurity, and AI governance foundations needed to deliver trusted, connected services at scale	<b>04</b>
	<b>Private-sector participation</b>	This capability facilitates pathways for increased participation by the private sector in mission-aligned innovation and delivery	<b>05</b>
	<b>Decentralized delivery</b>	This capability empowers local units to tailor and implement national missions in context-responsive ways, while maintaining alignment	<b>06</b>
	<b>Foresight and adaptive renewal</b>	This capability institutionalizes learning, horizon scanning, and scenario planning to keep governance responsive and future-ready	<b>07</b>

Source: Strategy& analysis

## Capability 1: Mission-oriented priorities

Missions are bold, shared priorities—such as deploying clean mobility, scaling AI-enabled health services, and advancing food security—that cut across sectoral, ministerial, and regulatory boundaries. This horizontal structuring does not replace vertical planning. Ministries continue to play a critical role in developing technical policy, stewarding resources, and delivering sector-specific expertise. But missions create a unifying logic that connects these structures, allowing governments to align multiple instruments (policy, regulation, funding, and delivery) according to what matters most. Vertical and horizontal structures coexist. Verticals build capability; missions drive focus and integration. Done well, mission-based priorities enable governments to coordinate complex programs, build shared accountability, and create the flexibility to adapt as conditions change.<sup>9</sup>

Saudi Arabia’s Vision Realization Programs reflect this mission logic. The National Industrial Development and Logistics Program (NIDLP), for example, brings energy, mining, industry and manufacturing, logistics, and investment agencies under a unified strategy; delivery is tracked through integrated KPIs and supported by a central office.<sup>10</sup> Kuwait has pursued a similar mission logic through its Vision 2035 (“New Kuwait”) strategy, which is based on seven national development pillars covering areas such as sustainable economy, infrastructure, healthcare, and public administration reform.<sup>11</sup>

Globally, the United Kingdom’s Net Zero Strategy offers a clear example of mission-oriented priorities in action. The mission, in this case achieving net-zero emissions by 2050, is backed by a whole-of-government structure involving energy, transport, housing, finance, and industry portfolios. A dedicated net-zero unit within the cabinet office oversees coordination, and departmental carbon budgets and sectoral decarbonization plans align institutions with the mission’s objectives.<sup>12</sup> Though implementation remains complex, the strategy reflects how missions can pull together diverse tools and actors around long-term, outcome-driven national priorities.

Balancing vertical expertise with horizontal integration requires careful choreography: Too much centralization often demands generalist skills at the expense of specialized expertise, weakening technical depth; conversely, too much fragmentation can reduce accountability and coherence if sectoral strategies only partially align with mission outcomes. There is also the risk of “mission creep,” in which too many priorities are designated as national missions, stretching capacity and blurring focus. Effective implementation depends on establishing a disciplined process for selecting missions, clarifying decision rights between mission structures and ministries, and embedding strong review mechanisms that can resolve conflicts and keep the system coherent.

## Capability 2: Domain governance platforms

Cross-cutting national missions require more than coordinating sectors, ministries, and government agencies. They require building ecosystems that bring together the actors, tools, resources, and infrastructure needed to fulfill each part of the mission. These ecosystems are structured as domain platforms that integrate policy, regulation, investment, and delivery capabilities within a specific area of value.

By establishing a unified governance layer for each ecosystem, governments can steer policymaking, regulation, investment, resourcing, and service delivery as a connected whole, tailored to mission objectives. In so doing, these domain platforms transform the traditional role of government from oversight and execution to orchestration. They give governments the tools to align regulation, simplify overlapping mandates, streamline development pathways, and create the conditions in which private actors can contribute at scale. This includes integrating infrastructure plans, harmonizing standards, linking data environments, and enabling co-investment models.

The UAE's approach to electric air mobility offers a clear example. Rather than treating it solely as a transport or aviation issue, the government created a platform that brought together aviation authorities, urban planners, infrastructure agencies, and private operators.<sup>13</sup> This platform enabled the government to pilot eVTOL (electric vertical take-off and landing) technologies, develop supporting regulations, and plan infrastructure as a unified system, thus contributing to a broader national mobility mission.<sup>14</sup>

Internationally, the Netherlands' "Top Sectors" approach reflects similar logic. Through platforms specific to areas such as energy, agriculture technology, and life sciences, the Dutch government aligns ministries, academia, industry, and investors on shared innovation agendas. These domain platforms integrate policy, R&D, investment, and workforce development within each domain.<sup>15</sup> Although no single platform delivers an entire mission, each one forms part of the ecosystem needed to advance national strategic priorities.

On the downside, these platforms can blur institutional accountability if mandates are not carefully defined, leading to duplication or conflicts. There is also the danger of bureaucratic layering, wherein platforms add processes without truly integrating delivery. Finally, if governments create platforms without clearly prioritizing national goals, they risk losing focus and dispersing resources across too many ecosystems, undermining the very coherence these platforms are meant to create.

### Capability 3: Agile sandbox labs

Agile sandbox labs allow governments to test, adapt, and refine delivery and regulation in real-world conditions. This is particularly important in the GCC region, where many national strategies depend on emerging technologies, evolving regulatory landscapes, and new delivery models in fintech, digital health, AI, and clean energy.

Embedded within mission ecosystems, sandboxes help governments shift from linear execution to active orchestration, engaging and collaborating with private-sector actors, regulators, and service providers in live, problem-solving environments. Public institutions move beyond static planning cycles and become more responsive to complexity, innovation, and changing citizen needs. More broadly, they shift the government's role from gatekeeper to codesigner, actively shaping innovation while ensuring it aligns with public value and long-term mission goals.

Abu Dhabi's Department of Health, for example, provides innovators with access to de-identified clinical data sets so they can validate new products against real-world governance and medical constraints.<sup>16</sup> This mechanism tests solutions under supervision, builds evidence on safety and performance, quickly exposes policy gaps, and creates a predictable path for the safe adoption of digital health technologies.

In the financial sector, sandboxes are prominent. Bahrain's Fintech Regulatory Sandbox is a leading regional example. In a program managed by the central bank, firms can test open banking, crypto assets, payments, crowdfunding, and other innovations under real regulatory supervision.<sup>17</sup> The sandbox accelerates innovation, maintains public trust, and influences national regulatory frameworks. More importantly, it positions government not as a barrier but as a partner in shaping responsible growth.

Meanwhile, the Monetary Authority of Singapore has established sandboxes for regulatory and ecosystem development.<sup>18</sup> These are embedded in strategic domains such as green finance, insurtech, and digital assets, and linked to broader initiatives including innovation labs, funding vehicles, and cross-border collaboration.<sup>19,20,21,22</sup>

Agile sandboxes also involve risks. Without clear entry and exit criteria, they can become holding pens that delay scale rather than accelerate it. Weak data-sharing rules or inconsistent supervision can undermine trust in the results. If sandboxes are set up in too many domains without prioritization, governments may spread scarce regulatory and delivery capacity too thin. There is also a risk that pilot projects will remain disconnected from mainstream regulation and delivery, creating a parallel track rather than feeding lessons back into the system. To avoid these pitfalls, governments can ensure that sandbox mechanisms are disciplined, transparent, and firmly embedded in the broader operating model.



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A trustworthy digital infrastructure is the backbone that allows governments to deliver reliable, auditable, and trusted public services at scale.

#### Capability 4: Trustworthy infrastructure for digital services

A trustworthy digital infrastructure is the backbone that allows governments to deliver reliable, auditable, and trusted public services at scale. It brings together unified digital identities for one-stop journeys; interoperable data standards and application programming interface (API)-first exchanges so agencies can work as one system; sovereign cloud services for compliant compute and storage, with audit trails and disaster resilience; strong cybersecurity to establish deep defenses across networks, applications, identities, and supply chains; and AI governance that define how models are selected, tested, monitored, and explained so automated decisions remain reliable and contestable.

Such digital infrastructures are already being built at scale in the region and beyond. Abu Dhabi's sovereign cloud has created a compliant, trusted backbone that multiple domains use to run sensitive workloads.<sup>23</sup> Using such national digital identity and open data initiatives, agencies can integrate services, share information with policy controls, and scale AI use cases in health, finance, and city services while meeting residency and security requirements. In another example, Estonia's e-ID, its digital identity system, and X-Road, a secure data exchange layer, let agencies share verified data securely with individuals' consent, so they do not have to submit the same information multiple times.<sup>24,25</sup> This reduces forms and errors, keeps a full audit trail, and delivers trusted end-to-end digital services.

The expansion of digital infrastructure also creates risks and trade-offs that governments are managing carefully. Centralized control can slow down innovation if decision rights are unclear, and weak guardrails can lead to fragmented standards and inconsistent protection. Cybersecurity vulnerabilities are amplified if legacy systems are connected without being upgraded, leaving attack points that are hard to monitor.

AI also introduces new risks. Models may produce biased or opaque results if not tested, monitored, and explained. Overreliance on a single vendor or platform can reduce flexibility and bargaining power. Finally, public trust can erode if citizens feel that their personal data is being reused without clear consent or visible safeguards. It's possible to mitigate these risks by embracing transparency, setting clear roles between central and sectoral entities, applying consistent rules for data and AI use, and requiring regular independent testing.

## Capability 5: Private-sector participation

Private-sector participation changes a government from a buyer to a partner, unlocking many advantages. One area of benefit is financing. These partnerships often blend instruments such as equity co-investment, concessional debt, guarantees, offtake and advance market commitments, and outcomes-based contracts. Many mission priorities are capital-intensive and front-loaded with risk. Co-investment shares risks, closes financing gaps, lowers the cost of capital for first-of-their-kind projects, and shortens time-to-market.

The value of public-private partnerships goes well beyond financing. Along with co-investing, governments are able to access the private sector's technical expertise, innovation, project development capacity, supply chain networks, outsourcing delivery, operational efficiency, and market know-how.

Canada has become one of the world's most mature and best-in-class public-private partnership (PPP) markets, underpinned by clear PPP frameworks and dedicated agencies such as Infrastructure Ontario and Infrastructure BC (formerly Partnerships BC).<sup>26,27</sup> Since the 1990s, Canadian provinces and the federal government have used PPPs to deliver hundreds of projects, including highways, transit lines, hospitals, and water systems. According to the Canadian Council for Public-Private Partnerships, a 2016 analysis of more than 200 PPP projects undertaken by the Canadian Centre for Economic Analysis estimated savings of up to Can\$27 billion (in today's exchange rate, US\$19.6 billion) over traditional procurement, with projects typically completed about one year sooner, on average.<sup>28</sup> These projects have also been instrumental in creating jobs and driving local economic growth.

In the GCC, Saudi Arabia and the United Arab Emirates have made public-private partnerships a core part of their infrastructure and service delivery strategies. Saudi Arabia's Vision 2030 reform agenda established PPPs as a national priority, supported by a dedicated law and the National Center for Privatization and PPP.<sup>29</sup> Over 200 projects have been approved across sectors including airports, water, energy, and healthcare.<sup>30</sup> One notable example is the Prince Mohammed Bin Abdulaziz International Airport in Madinah, delivered by a private consortium under a 25-year concession. It was the first airport PPP in Saudi Arabia and received international recognition for its innovative delivery.<sup>31</sup>

In the UAE, Abu Dhabi's Noor solar park, one of the world's largest solar projects when commissioned, developed as a PPP and achieved record-low pricing for solar energy.<sup>32</sup> Dubai has applied PPPs in education, waste-to-energy, and transport, supported by dedicated legal frameworks and procurement units.<sup>33</sup> Together, these examples reflect growing institutional maturity in structuring and executing PPPs across the region.

Public-private partnerships also present challenges. Weak project selection criteria may result in capital and capacity being directed to marginal initiatives rather than national priorities. Inadequate oversight or performance management can reduce accountability and expose governments to delivery failures or reputational risk. Overcomplicated frameworks and overlapping institutional roles can create confusion for both public actors and private partners, eroding trust. To be effective, successful partnerships must be grounded in a robust legal and policy framework, supported by transparent procurement, strong governance, and clear mechanisms to ensure alignment with public value.

## Capability 6: Decentralized delivery

Decentralized delivery authorities translate national missions into local portfolios. They have the authority, budgets, data access, and delivery tools to tailor programs to local needs while remaining aligned with national standards and outcomes. The form of these authorities varies by context: They might be special economic zones, royal commissions, regional development authorities, or city delivery offices.

These regional delivery entities are critical because many missions are tied to a specific geographic area. Location determines where facilities and infrastructure are built, how projects are sequenced, how supply chains operate, how the workforce is deployed, and how citizens adopt services. These entities can shorten feedback loops, identify bottlenecks early, and coordinate local actors under one plan.

Royal commissions offer a long-standing model for decentralized execution. The Royal Commission for Jubail and Yanbu, established in 1975 with administrative autonomy and its own budget, plans and manages large industrial cities and has attracted substantial investments. Over five decades, total returns from its cities have been around SAR 1.2 trillion (around US\$320 billion).<sup>34</sup> The same model is used for cultural tourism development by the Royal Commission for AlUla, which was created by royal decree in 2017 to conserve heritage and drive sustainable local development.<sup>35</sup>

Beyond the region, Shanghai's Pudong New Area operates under a national reform pilot through 2027 that delegates the core powers for planning, investment attraction, and service delivery to a single administrative committee, thus keeping accountability and execution closely linked. In 2022 alone, Pudong generated about US\$220 billion in GDP.<sup>36,37</sup>

These regional entities depend on the availability of local capabilities and strong performance management to be effective. If accountability mechanisms are weak, for example, local entities may pursue their own priorities at the expense of national coherence. Fragmented policies or misaligned budgets across ministries can create gaps, such as housing projects being planned without a parallel investment in schools, healthcare facilities, or transport. There is also the risk of competition or duplication between local entities if coordination mechanisms are not in place. To mitigate these risks, governments are pairing delegation with clear metrics, transparent oversight, and coordination tools that ensure local plans will reinforce national missions.

## Capability 7: Foresight and adaptive renewal

Foresight and adaptive renewal embed horizon scanning, scenario planning, mission-portfolio management, and continuous evaluation into government decision-making. The aim is to anticipate change, test options early, and update strategies and delivery plans on a clear cadence.








Foresight and adaptive renewal matter because priorities, technologies, and risks shift faster than annual planning cycles. Governments need a function that looks ahead, measures how the "delivery machine" is performing, and proposes timely adjustments. In practice, this entails centralized foresight; a single portfolio view of missions and risks; dated review gates; triggers to scale, amend, or sunset programs; and oversight that travels from the center to regions and back to keep improving outcomes. This approach ensures consistent service delivery and builds trust with the public as the government adjusts its national priorities.

Qatar is establishing a center for foresight and renewal through the National Planning Council, structured around foresight, national visions, policy, and behavioral capabilities. This center will run ongoing horizon scanning, scenario planning, policy experimentation, and public-sector learning that refreshes the national vision and informs policy design over time. In parallel, Saudi Arabia's National Center for Performance Measurement (ADAA) regularly evaluates the performance of public entities, stepping in to drive course corrections and reprioritization when initiatives drift off track.<sup>38</sup> The impact is visible: Saudi Arabia rose from 31st in 2022 to sixth globally in the 2024 U.N. e-Government Development Index.<sup>39</sup>

**EXHIBIT 4**

**Capabilities in action**

Regional and global examples

Capability	Regional examples	Global examples
 <p><b>Mission-oriented priorities</b></p>	<p><b>Saudi Arabia:</b> Vision Realization Programs  <b>Kuwait:</b> Vision 2035 pillars</p>	<p><b>U.K.:</b> Net Zero Strategy (whole-of-government coordination with departmental carbon budgets and cabinet office oversight)</p>
 <p><b>Domain governance platforms</b></p>	<p><b>UAE:</b> Electric air mobility platform (aviation, telecom, infrastructure, private operators)</p>	<p><b>Netherlands:</b> “Top Sectors” (energy, agri-tech, life sciences platforms linking ministries, academia, and investors)</p>
 <p><b>Agile sandbox labs</b></p>	<p><b>UAE:</b> Dept. of Health sandbox  <b>Bahrain:</b> Fintech Regulatory Sandbox  <b>Qatar:</b> CB Express Sandbox</p>	<p>Monetary Authority of <b>Singapore</b> sandboxes across green finance, insurtech, and digital assets</p>
 <p><b>Trustworthy infrastructure for digital services</b></p>	<p><b>UAE:</b> Abu Dhabi sovereign cloud</p>	<p><b>Estonia:</b> e-ID and X-Road data exchange, supporting seamless digital services with audit trails</p>
 <p><b>Private-sector participation</b></p>	<p><b>Saudi Arabia:</b> 200+ projects including Prince Mohammed Bin Abdulaziz International Airport  <b>UAE:</b> Noor solar park</p>	<p><b>Canada:</b> PPP frameworks such as Infrastructure Ontario and Infrastructure BC</p>
 <p><b>Decentralized delivery</b></p>	<p><b>Saudi Arabia:</b> Royal Commissions (e.g., Jubail, Yanbu, AIUla) and special economic zones with delegated authority</p>	<p><b>Shanghai's</b> Pudong New Area (empowered regional authority translating national strategy into local outcomes)</p>
 <p><b>Foresight and adaptive renewal</b></p>	<p><b>UAE:</b> Future Foresight Strategy; Government Accelerators  <b>Qatar:</b> NPC's future foresight and national visions center</p>	<p><b>Singapore's</b> Public Sector Transformation Program, Public Sector Outcomes Review, Whole-of-Government, Performance Reporting Portal</p>

Outside the GCC, Singapore pairs foresight with mechanisms for continual renewal. The Public Service Division's Public Sector Transformation program provides the continuous improvement backbone.<sup>40</sup> The Singapore Public Sector Outcomes Review and the Whole-of-Government Performance Reporting Portal track outcomes and flag course corrections across portfolios.<sup>41,42</sup>

Major strategy refreshes, such as the current Economic Strategy Review, keep policies, structures, and talent priorities up to date.<sup>43</sup>

The key to using foresight and renewal effectively is embedding them in the everyday rhythm of government rather than treating them as occasional exercises. Scenario planning incorporates budget choices and resource allocations in order to shape real decisions. Accountability mechanisms ensure that public entities translate recommendations into action.

When embedded as a system, these seven capabilities reinforce one another and create powerful benefits: shorter time from strategy to service; integration across ministries with consistent standards and data; locally responsive implementation within common guardrails; scalable partnerships that deliver better value for the money; and resilient delivery supported by continuous learning.

Institutionalizing this new governance architecture involves codifying it through laws, regulations, standards, guides, and operating manuals; guaranteeing capacity-building and training; and tracking adherence and impact. This ensures that pilots become an ongoing, scalable source of innovation across sectors and regions, while delivering tangible benefits for citizens, businesses, and investors alike. The question now is how best to implement this architecture.



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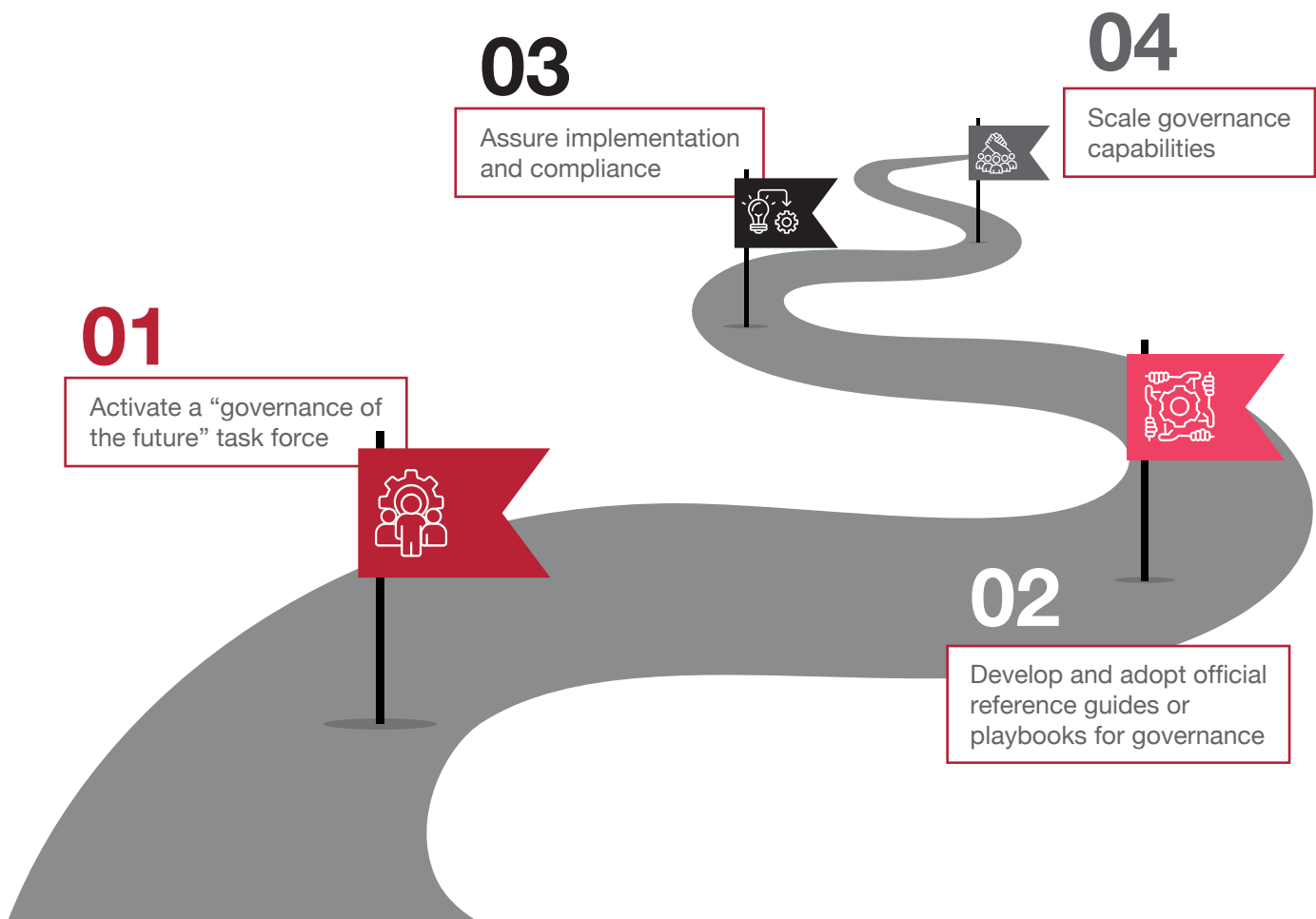
When embedded as a system, these seven capabilities reinforce one another and create powerful benefits: shorter time from strategy to service; integration across ministries with consistent standards and data; locally responsive implementation within common guardrails; scalable partnerships that deliver better value for the money; and resilient delivery supported by continuous learning.

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## HOW TO IMPLEMENT THE NEW GOVERNANCE ARCHITECTURE

Most GCC governments already have many elements of the new governance architecture in place. The task ahead is to close the gaps, codify what works, and embed the elements into day-to-day operations so progress is consistent across missions, domains, and regions. This approach will accelerate national priorities and strengthen citizen trust. We see the implementation journey occurring in four major steps (see *Exhibit 5*).

### EXHIBIT 5 Implementing the new governance architecture



Source: Strategy& analysis

## **Step 1: Activate a “governance of the future” task force**

A central “governance of the future” task force that is empowered, equipped with the right capabilities, and supported by clear accountability mechanisms can champion the development of the new governance architecture. It can bring national missions, domain platforms, and regional execution together into a coherent whole, set a clear cadence for decision-making, and give leaders a consolidated line of sight across government priorities. By convening the relevant actors, clarifying responsibilities, and ensuring that pilots and demonstrations are scaled, the task force can help convert fragmented initiatives into a consistent way of working.

The task force is not another bureaucratic layer. If properly empowered, it can consolidate what exists, fill the gaps, and provide the discipline to embed a new operating model into daily practice. Moreover, such a task force can be housed within existing bodies. Case in point: Qatar’s National Planning Council is expanding to include a foresight and policy lab to renew the national vision and act as a platform for ongoing policy experimentation.

## **Step 2: Develop and adopt official reference guides or playbooks for governance**

The reference guide or playbook connects strategy, policy, regulation, investment, and delivery into a single architecture that mirrors how government actually functions. This ensures that decisions, resources, data, and services move in step, creating a common rhythm across the system rather than leaving entities to operate in silos.

The reference guide or playbook establishes predictable pathways from concept to pilot to scale, clarifies how the private sector and innovation feed into public mandates, and spells out how to redeploy talent to priority missions when needed.

Saudi Arabia’s Vision 2030 structure illustrates this logic. The Vision Realization Programs provide a mission-based architecture that cuts across ministries and agencies, with embedded delivery offices in public entities and central oversight at the Council of Economic and Development Affairs.<sup>44</sup> This gives coherence to national priorities while leaving technical policy and service delivery with line ministries.

For other governments, the task is less a matter of inventing something new and more a matter of aligning existing initiatives using a common playbook. By doing so, they can build consistency across government, ensure smoother collaboration with the private sector, and create the conditions for faster, more adaptive delivery.

### **Step 3: Assure implementation and compliance**

Execution assurance is the operating rhythm that links plans, budgets, and delivery to verified performance. It gives leaders a clear view of progress across missions, domains, and regions through structured reviews, common metrics, and dashboards. When problems crop up, leaders can make timely adjustments to keep advancing priorities.

The Gulf region already has strong foundations to build on. In Qatar, the National Planning Council convenes portfolio reviews, runs policy and behavioral labs to address delivery bottlenecks, and applies insights during regular decision cycles to update programs on a predictable cadence. In Saudi Arabia, the National Center for Performance Measurement (ADAA) provides integrated performance analyses to senior leadership and supports quarterly reviews that help guide course corrections and reprioritizations.<sup>45,46</sup>

### **Step 4: Scale governance capabilities**

To make the new governance architecture work at scale, leaders and teams need to both hone and expand their skills. Officials must be retrained so they can operate confidently within an architecture that is more integrated, mission oriented, data informed, and collaborative. The goal is for teams to become comfortable working through shared decision forums and using real-time insights to adjust priorities in changing conditions.

Equally important is that leaders and officials use the governance architecture as a practical operating system. That entails knowing how to run mission reviews that test delivery trajectories, how to coordinate across entities through domain platforms, how to bring problems into common escalation channels, and how to align sector plans within unified national guardrails. Leaders and officials also need the skills to grow and sustain the architecture over time. This includes refreshing missions as national priorities evolve, preserving accountability structures during institutional changes, keeping data and service standards consistent across entities, and embedding continuous learning so the architecture adapts rather than weakens.

By scaling these skills across ministries and regions, governments ensure the new governance architecture offers a way of working that remains coherent even as teams rotate and national priorities shift. It becomes a living operating approach that can adjust to new demands while maintaining the clarity and discipline needed for effective delivery.

## CONCLUSION

This new public governance architecture turns national ambition into effective delivery. It aligns missions, domain platforms, regional execution, digital trust, co-investment, and foresight into one operating system so that strategy, regulation, investment, and services move together. When these capabilities work as a system, governments gain a clear line of sight from intent to outcomes, accelerate problem-solving, and make progress visible and repeatable.

For citizens, the architecture results in services that are designed around life events rather than institutions. It reduces repetitive paperwork, provides one-stop journeys anchored in secure identity and data, and makes progress tangible. Citizens gain more confidence that national strategies translate into improvements they can actually feel in daily interactions with government.

For businesses, the architecture creates more predictable conditions for growth. Domain platforms and sandboxes offer clear pathways to piloting and scaling innovations with regulators, while consistent rules across sectors lower the friction of compliance. Decentralized delivery is more responsive to local needs, ensuring that investment decisions are made with better visibility of time lines, approvals, and infrastructure readiness.

For investors, the architecture offers reliability and scale. Co-investment engines make risk-sharing transparent and rules-based, offering credible entry points into new markets. There's assurance that data, digital identity, and AI use are governed using international standards. Meanwhile, foresight and renewal mechanisms reduce policy volatility, giving long-term investors confidence that governments will adapt priorities rather than abandon them.

The GCC region already demonstrates many elements of the new governance architecture. Mission architectures are in place. Digital identity and data infrastructure are scaling. Sandboxes and co-investment vehicles are active. Performance institutions provide a common cadence for review and adjustment. The task ahead is to codify what works, fill the gaps, and embed the operating rhythm so results are consistent across entities and regions.

This is also the right moment for a new governance architecture. Saudi Arabia is preparing for the chapter beyond Vision 2030 and is shaping what long-term delivery will require. The UAE set a clear horizon through its road map, "We the UAE 2031," and continues to evolve agile governance and digital foundations.<sup>47</sup> Qatar established the National Planning Council to renew the national vision and run foresight and policy experimentation. Oman is advancing its Vision 2040 with a strong localization focus, and Bahrain and Kuwait continue to refresh priority programs that broaden private-sector participation and strengthen institutional performance.<sup>48</sup>

Transformation is necessary, but thankfully, GCC governments are not starting from zero. They can build on strong existing foundations to accelerate adoption: a task force to set the cadence; a playbook that aligns missions, domains, and regions; governance capacity building; and assuring implementation and compliance to address problems early on and make progress transparent and tangible. Taken together, these steps can turn proven practices into a powerful new governance architecture that will accelerate national missions.

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