

POLICY BRIEF · FOR OFFICIAL CIRCULATION

# Applied AI as Pakistan's Economic Lever: A Proactive Budget Submission for FY 2026–27

**Submitted by:** Densight Labs; Pakistan's Institute of Applied Artificial Intelligence

**Addressed to:** Ministry of Finance · Ministry of IT & Telecom · FBR · PSEB · P@SHA

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## Disclosure of Interest

Densight Labs is a private-sector AI consulting and practitioner education firm. The recommendations in this brief create a policy environment from which firms like Densight Labs could benefit; specifically through competitive open tendering for Tier A skilling contracts (R1) and PSEB-registered provider status for NAAF grant facilitation (R4). The authors declare this interest transparently. All recommended disbursement mechanisms are structured around PPRA-governed open competition and independent technical evaluation, ensuring no preferential access. Densight Labs would compete for any contracts on equal terms with all qualifying firms.

**\$3.2B**

**Pakistan AI Market 2030**

27.76% CAGR (Statista, 2025) [1]

**\$10B**

**IT Export Target (Uraan)**

by FY 2028–29; run-rate ~\$4.5B/yr [2]

**<10%**

**AI-Ready IT Workforce**

of professionals have AI skills [3]

## 01 · EXECUTIVE SUMMARY

Pakistan's IT and IT-enabled services sector generated \$3.39 billion in exports in the first nine months of FY 2025–26 (July–March), growing at 23.7% year-on-year. Annualised trajectory points toward approximately \$4.5 billion for the full year; a record pace.<sup>[2]</sup> The National AI Policy 2025 has been launched. Freelance foreign exchange earnings surged 50% in the same period.

Yet the FY 2025–26 budget allocated only Rs 4.8 billion to Science & Technology and Rs 13.5 billion to the Ministry of IT and Telecom; combined, less than 0.11% of the total Rs 17.6 trillion outlay. The gap between stated ambition and fiscal commitment remains the defining structural risk to Pakistan's digital growth story.

This submission presents four interconnected budget recommendations for FY 2026–27, each grounded in data, supported by international precedent, and designed around Pakistan's actual

fiscal constraints; including the IMF structural benchmark environment. The brief is structured around the ADAPT Framework (defined in Section 3), Densight Labs' proprietary methodology for enterprise AI transformation.

The core argument: Pakistan's AI gap is not a technology gap. It is a structural one. The workforce is not AI-ready. The tax framework needs performance-linked reform, not exemptions. Enterprise adoption is slow because there is no institutional bridge between policy intent and organisational change. Pakistan's IT export base is growing in volume without growing in value. **This brief is a practitioner's diagnosis with a prescriptive framework; not an advocacy document.**

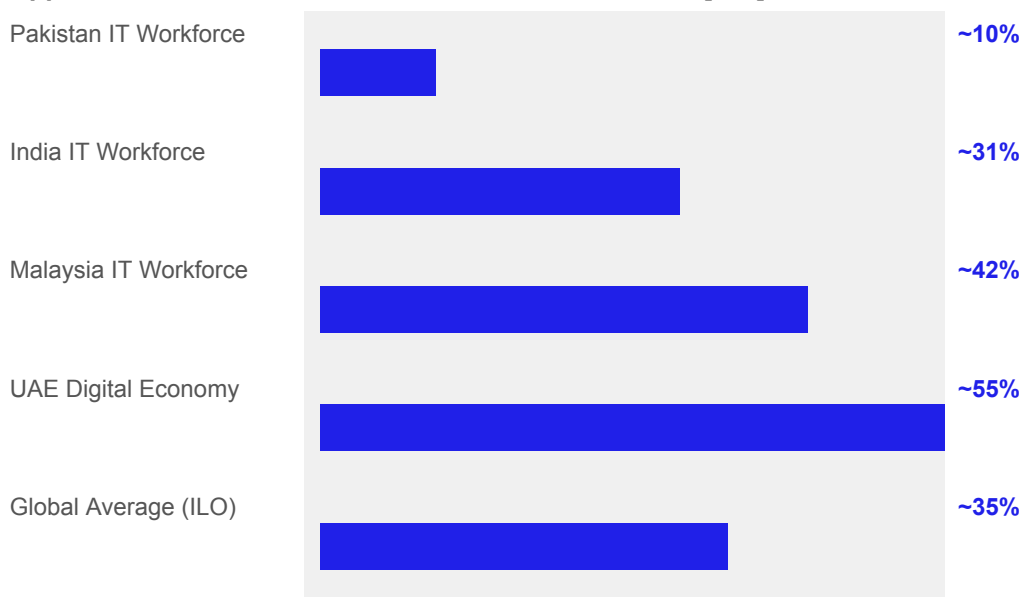
## 02 · DIAGNOSTIC: WHAT THE DATA SAYS

### 2.1 The Skills Gap Is the Core Bottleneck

Pakistan produces more than 75,000 IT graduates annually. Yet only a fraction enters the formal technology workforce,<sup>[4]</sup> and fewer than 10% of active IT professionals possess applied AI skills.<sup>[3]</sup> The reason is structural: university curricula are misaligned with industry demand, and there is no credentialing system connecting AI skill acquisition to employment outcomes.

The Access Partnership estimates that narrowing Pakistan's digital skills gap could add PKR 2.8 trillion to annual GDP by 2030.<sup>[5]</sup> Google's economic impact research shows AI-related tools already added PKR 3.9 trillion in economic benefits in 2023; a 222% increase since 2020.<sup>[6]</sup> These are not marginal numbers.

#### Applied AI Skill Penetration: Pakistan vs. Benchmarks [3, 7]



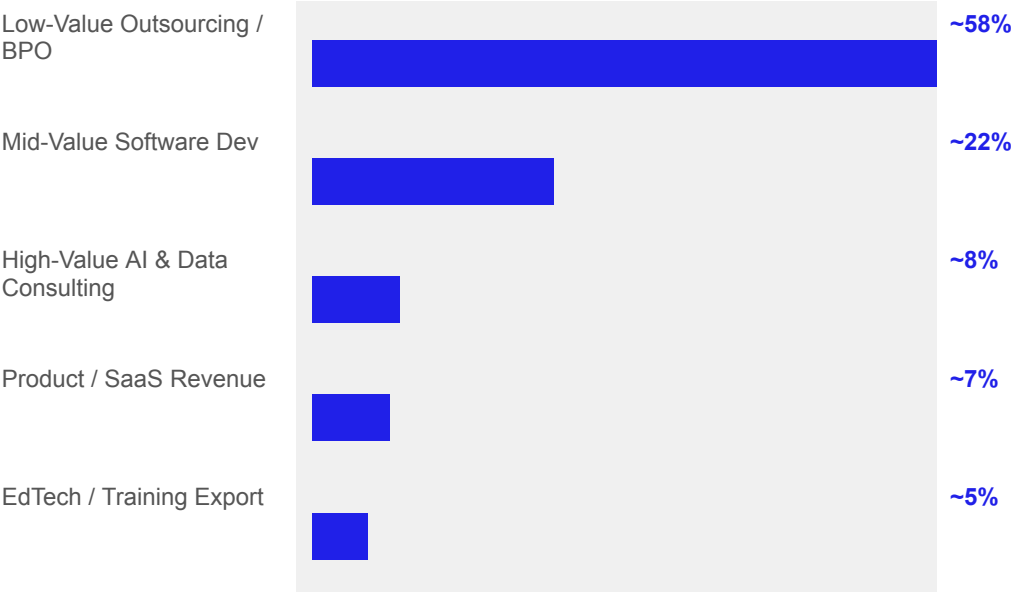
Sources: [3] National AI Policy 2025; [7] ILO Digital Labour Report 2024; industry benchmarks. Pakistan figure reflects formal IT sector. International figures are indicative estimates from published workforce analytics.

### 2.2 IT Exports Are Growing in Volume, Not Value

Pakistan's IT export trajectory is strong: \$3.39 billion in July–March FY 2025–26,<sup>[2]</sup> on track for a record year. However, over 70% of this revenue derives from low-to-mid complexity outsourced development and freelance services. The high-value AI and data consulting segment; commanding 3–5x the per-hour rate; remains underdeveloped.

The GCC market alone spends over \$12 billion annually on AI consulting and implementation services.<sup>[8]</sup> Pakistan captures less than 1% of that; not because of talent deficits, but because of credibility deficits: no recognised AI training credentials, no institutional track record, and no government-backed certification framework to signal quality to international buyers.

#### Pakistan IT Export Mix; Estimated Composition (FY 2025–26) [2, 9]



Estimated composition based on PSEB, SBP, and industry data [9]. High-value AI consulting segment is fastest-growing subsector. Figures are estimates; Pakistan's first IT Census (currently underway) will provide authoritative data.

### 2.3 Enterprise AI Adoption Is Low and Poorly Measured

Major IT export firms report that up to 30% of their solutions now incorporate AI components,<sup>[10]</sup> largely driven by international client demand rather than domestic policy incentives. Pakistani SMEs are beginning to adopt AI-powered tools, but without structured training or change management support, adoption remains surface-level.

Pakistan is about to conduct its first-ever IT census<sup>[11]</sup>; a revealing acknowledgement that the government has been setting export targets for a sector it cannot yet fully measure. Policy cannot be evidence-based if the evidence base does not exist.

## 2.4 The Tax Framework Needs Performance-Linked Reform

The FY 2025–26 budget introduced a 5% withholding tax on IT services exports; a provision that adds compliance friction to early-stage AI startups and individual practitioners building Pakistan's AI export capability. The EdTech sector faces similar ambiguity, with no clear tax category for AI-powered cohort programmes.

This brief does not propose a flat tax holiday; that is not viable within Pakistan's current IMF structural benchmark environment. Instead, Section 4 (R2) proposes a Tax-Neutral Sandbox: performance-linked, SBP-remittance-verified, and revenue-neutral over the fiscal cycle.

## 03 · THE ADAPT FRAMEWORK

Densight Labs' recommendations are structured around the ADAPT Framework; the proprietary methodology the firm applies to enterprise AI transformation engagements. For external readers, the acronym and its mapping to this brief are defined below.

Stage	Pillar	What It Means in Policy Terms
<b>A</b>	<b>Assess</b>	Understand the current state; skills gap, export value composition, adoption baseline. Sections 2.1–2.4 of this brief.
<b>D</b>	<b>Design</b>	Define the intervention architecture; tiered skilling fund, Tax-Neutral Sandbox, certification standard, adoption fund.
<b>A</b>	<b>Acquire</b>	Secure resources and capabilities; budget allocation, private sector partner selection via PPRA, AI-DU mandate.
<b>P</b>	<b>Pilot</b>	Launch bounded, measurable experiments; PACS pilot in FY 2026–27, NAAF first cohort of 600 SMEs, Tier A skilling first 5,000 practitioners.
<b>T</b>	<b>Transform</b>	Scale what works, exit what doesn't; AI-DU quarterly reporting, independent M&E, scale successful pilots in FY 2027–28.

The ADAPT structure ensures each recommendation is not a standalone ask but part of a sequenced transformation; one that can be monitored, adjusted, and held accountable.

## 04 · RECOMMENDATION FRAMEWORK

Four recommendations, one execution architecture. All disbursements are PPRA-governed. All metrics are independently verifiable. The AI Delivery Unit (AI-DU) under the Prime Minister's Office coordinates across ministries; preventing the inter-ministerial coordination failure that has historically grounded good policy in Pakistan.

#	Pillar	Recommendation	Primary Metric
R1	Digital Skills	National Applied AI Skilling Fund; Rs 5B, two-tier model	20K advanced + 80K foundation practitioners by FY28
R2	Tax Reform	Tax-Neutral Sandbox; deferred model linked to SBP-verified FX	500+ firms in deferred model; SBP FX inflows as KPI
R3	Export Credential	Pakistan AI Certification Standard (PACS); IEEE/ISO-aligned	\$500M incremental AI consulting exports by FY28
R4	SME Adoption	National AI Adoption Fund (NAAF); matching grants, PPRA-governed	600 SMEs with verified AI adoption by FY27

## 05 · DETAILED RECOMMENDATIONS

### R1 · National Applied AI Skilling Fund

Pakistan's National AI Policy 2025 targets 3,000 AI scholarships annually<sup>[3]</sup> and the establishment of AI Centres of Excellence in Karachi, Lahore, and Islamabad. These are the right ambitions. They require proportionate funding.

A critical design principle: the fund must prioritise depth over volume. Pakistan already has surface-level AI awareness programmes. What the economy needs are practitioners who can architect and deploy; not professionals who have completed a 4-hour online course. Accordingly, we recommend a two-tier structure with explicit quality safeguards:

- Tier A; Advanced Practitioner Track (Rs 2B): Target 20,000 high-tier certifications at approximately Rs 100,000 per head. This is deliberately ambitious but not unrealistic: Malaysia's equivalent programme achieved 18,000 advanced AI certifications in 18 months with comparable per-head investment. Delivery through private sector partners selected via open, competitive PPRA tendering. Eligibility criteria: prior enterprise AI delivery experience, documented curriculum aligned with PACS Tier 2+ standards, and mandatory outcome reporting (employment rate, project completion, industry verification) as a funding condition. Note on absorption risk: industry absorption of 20,000 advanced practitioners will require parallel enterprise demand stimulation; NAAF (R4) is the demand-side complement.
- Tier B; Foundation AI Literacy Track (Rs 1.5B): Integration of AI modules into HEC-affiliated institutions; retrofitting existing CS, business, and engineering curricula, not building parallel programmes. Target: 80,000 foundational certifications across universities and TVETs. Per-head cost approximately Rs 18,750, consistent with HEC-funded module delivery norms.
- Women in AI Initiative (Rs 1B): Ring-fenced within Tier A and Tier B allocations; not a standalone stream. Integration design: at least 40% of all Tier A PPRA contracts must demonstrate a women's participation plan with measurable targets, verified at mid-term review. Tier B institutions with below-30% female enrolment receive conditional funding with improvement milestones. This prevents tokenism and ties funding to outcomes.
- Ecosystem Infrastructure (Rs 0.5B): Shared AI compute credits, open datasets, and curriculum standards; public goods reducing delivery costs for all PPRA-approved providers. Managed by PSEB as a neutral infrastructure layer.

Precedent: Malaysia's National AI Roadmap allocated USD 1 billion over five years for AI upskilling,<sup>[12]</sup> with deliberate emphasis on industry-aligned advanced credentials. Saudi Arabia's Vision 2030 digital skills initiative prioritised depth in AI, cloud, and cybersecurity.<sup>[13]</sup> Pakistan's Rs 5B ask is conservative by regional standards and structured for quality, not headline numbers.

## R2 · Tax-Neutral Sandbox

Pakistan's AI startup ecosystem is in its formation stage. Any fiscal proposal must be designed within Pakistan's actual constraints: FBR's mandate to widen the tax net, eliminate exemptions, and meet IMF structural benchmarks. A flat tax holiday is not viable. It would not survive FBR review.

We propose a Tax-Neutral Sandbox; a deferred, performance-linked framework that costs the exchequer nothing upfront:

- Deferred Tax Model for Registered AI Firms: Firms registered under a new PSEB 'Applied AI Enterprise' category defer corporate income tax for three years. Deferred amounts are repaid in Years 4 and 5, with a 10% repayment premium waived only if net-new SBP-verified foreign exchange remittances exceed a defined annual threshold. Revenue-neutral over the cycle. Legal template: Pakistan's existing Special Technology Zones (STZ) framework provides an administrative precedent for deferred fiscal instruments linked to export performance.
- Tiered Withholding Tax Linked to SBP Inflows: The 5% withholding tax on IT service exports is restructured as a tiered rate; 0% for firms with verified SBP remittances above PKR 10M annually; 2.5% for firms above PKR 2M; 5% for all others. Tax benefit is earned by bringing verified dollars into Pakistan; not awarded upfront.
- 25% Tax Credit on Documented AI Training Investment: Any business; across all sectors; that documents structured AI skills training expenditure through a PSEB-registered provider receives a 25% tax credit. This simultaneously expands FBR's documented expenditure base and incentivises enterprise adoption.
- Simplified GST Category for AI EdTech: A clearly defined GST classification for cohort-based AI education businesses, removing current regulatory ambiguity and reducing compliance costs.

On eligibility definition: the 'Applied AI Enterprise' category must have clear, objective criteria; minimum revenue thresholds, staff headcount, SBP registration, and IT export documentation; to prevent misuse. A technical committee under PSEB, with FBR observer status, should define and administer eligibility annually. This is a manageable administrative load with existing institutional capacity.

India's Startup India programme and the UAE's free zone models are commonly cited as comparators. Both are structurally different from what Pakistan's fiscal environment can support today. The Tax-Neutral Sandbox is designed for Pakistan's actual constraints; not for a different country's balance sheet.

### R3 · Pakistan AI Certification Standard (PACS)

Pakistan cannot capture high-value AI consulting contracts in the GCC, Malaysia, or Western markets without a nationally recognised AI certification standard. Individual professionals and firms currently have no credential to show international clients that signals verified AI capability; comparable to a Salesforce certification, an AWS Solutions Architect badge, or India's NASSCOM AI certification.

We recommend PSEB develop and administer PACS, with a critical design principle: do not build from scratch. Adapt and align with existing international standards; IEEE's AI competency frameworks, ISO/IEC 42001 (AI Management Systems), and GCC-specific procurement credential requirements. Building on established standards accelerates GCC market recognition by 18–24 months compared to a bespoke national framework and reduces development costs significantly.

Tier	Credential	Target Audience	Value to Export
Tier 1	AI Practitioner	Working professionals, recent graduates	Entry-level AI project roles
Tier 2	AI Implementation Specialist	Consultants, developers	Client-facing AI delivery roles
Tier 3	AI Strategy Advisor	Senior managers, C-suite	Enterprise AI strategy mandates
Tier 4	Certified AI Firm	Consulting firms, training institutes	Preferred vendor lists in GCC/SEA markets

Budget: Rs 800M covers standards adaptation, international alignment partnerships, platform build, exam delivery infrastructure, and FY 2026–27 pilot administration across three cities. Recurring costs post-pilot are largely self-funded through examination fees; a sustainable model used by NASSCOM and AWS certification programmes globally.

Risk: GCC procurement bodies must formally recognise PACS for it to drive export value. This requires active diplomatic engagement by MoITT and PSEB with GCC counterparts; specifically UAE's TDRA, Saudi Arabia's MCIT, and Qatar's MDPS. The AI-DU should include this as a Year 1 mandate.

### R4 · National AI Adoption Fund (NAAF)

Digital transformation could generate PKR 9.7 trillion (\$34.9 billion) in value for Pakistan's economy by 2030.<sup>[6]</sup> The majority of that value sits in sectors; manufacturing, retail, healthcare, logistics; where SMEs dominate. Without an adoption fund, that value remains theoretical.

We recommend a Rs 3B National AI Adoption Fund structured as a matching-grant mechanism:

- Eligible SMEs (registered, tax-compliant, under 500 employees) apply for grants covering 40% of documented AI implementation costs; up to a maximum of Rs 5M per firm. Implementation must be carried out through a PSEB-registered AI firm or certified AI implementation partner.
- Verification of 'documented AI implementation costs': Eligible costs are defined narrowly; software licences, integration services, staff training from PSEB-registered providers, and hardware directly attributable to AI deployment. All claims require third-party accountant sign-off and PSEB spot audits. This prevents leakage and ensures accountability.
- Productivity metrics: Each grant recipient must submit a baseline assessment before implementation and a verified outcome report at 12 months; covering at least two of: cost reduction (%), revenue growth (%), staff time saved per week, error rate reduction, or customer response time improvement. Independent verification by a PSEB-appointed evaluator.
- Sector priority weighting: Manufacturing (30%), healthcare (20%), financial services (20%), agriculture-tech (15%), retail/logistics (15%).
- Conflict of interest management: Grant disbursement decisions are made by an independent technical committee; not PSEB alone; comprising MoITT, SBP, a P@SHA representative, and two independent industry experts. Densight Labs and any other firms with staff on the committee are recused from decisions on grants where they are the implementation partner.

At Rs 3B deployed over two years at Rs 5M per grant, NAAF would support approximately 600 SME AI implementations in its first cycle; a visible, measurable national programme. The demand it creates for AI practitioners directly supports R1's supply-side investment.

## 06 · IMPLEMENTATION RISKS & MITIGATION

New institutional frameworks carry execution risk. The four recommendations collectively create a new registration category, a new certification body, a new grant scheme, and a new coordination unit. Acknowledging risk upfront; and designing mitigation in; is more credible than presenting a clean plan.

Risk	Likelihood / Impact	Mitigation
<b>Advanced practitioner absorption</b>	Medium / High. 20,000 advanced AI practitioners in 2 years requires parallel enterprise demand.	NAAF (R4) is the demand-side complement. R1 and R4 are sequenced; R4 grants activate 6 months after R1 cohorts begin, creating pull.
<b>PPRA tendering delays</b>	High / Medium. Competitive tendering can take 6–9 months in Pakistan's system.	AI-DU is mandated to run pre-qualification rounds in Q1 FY2026–27, before budget is allocated, so providers are ready to contract on day one.
<b>PACS GCC recognition</b>	Medium / High. Without active GCC recognition, PACS credential has limited export value.	Year 1 mandate: MoU with at least two GCC standards bodies. Build on IEEE/ISO standards rather than

		bespoke framework to accelerate recognition.
<b>Tax sandbox eligibility gaming</b>	Medium / Medium. 'Applied AI Enterprise' category could be gamed by firms rebranding existing services.	FBR technical committee defines eligibility with minimum AI revenue share (>40% of total), SBP export documentation, and annual re-certification.
<b>AI-DU administrative overload</b>	Low / High. A new coordination unit under PMO with insufficient mandate becomes another bottleneck.	AI-DU is lean by design: 15–20 professionals, defined mandate, quarterly public reporting. CPEC Authority model; narrow scope, high authority.

### Monitoring & Evaluation Framework

Independent M&E is non-negotiable for a programme of this scale. We recommend:

- Quarterly AI-DU Progress Reports: Published publicly, covering all four recommendations. Metrics: practitioners certified (Tier A/B), AI firms in deferred model, PACS exams administered, NAAF grants disbursed and verified outcomes.
- Annual Independent Evaluation: Commissioned by AI-DU from a third-party evaluator; not PSEB, not MoITT; covering programme effectiveness, value for money, and recommendations for Year 2 adjustments.
- SBP FX Inflow Tracking: The SBP already tracks IT remittance data. R2's deferred model requires a dedicated reporting line for 'AI Enterprise' category firms, verified against PSEB registration rolls quarterly.
- NAAF Outcome Verification: 12-month outcome reports from each grant recipient, independently verified by PSEB-appointed evaluators. Firms failing to submit or meeting less than 50% of their baseline improvement targets are ineligible for second-round grants.

## 07 · BUDGET ASK SUMMARY

All four recommendations are consolidated under a single AI Delivery Unit (AI-DU) housed under the Prime Minister's Office; preventing the inter-ministerial coordination failure that historically grounds good policy. The AI-DU model has legal precedent in Pakistan: the CPEC Authority and STZA demonstrate that a narrow-mandate, high-authority coordination vehicle can cut across ministries without requiring institutional redesign.

#	Recommendation	Allocation	Timeline	Execution Owner
<b>R1</b>	National Applied AI Skilling Fund (Tiered)	<b>Rs 5.0B</b>	FY26–27 to 28	AI-DU → MoITT + HEC
<b>R2</b>	Tax-Neutral Sandbox (Revenue-neutral, deferred)	<b>Rs 0 upfront</b>	Immediate FY26–27	AI-DU → FBR + SBP

<b>R3</b>	Pakistan AI Certification Standard (PACS)	<b>Rs 0.8B</b>	FY26–27 pilot	AI-DU → PSEB
<b>R4</b>	National AI Adoption Fund (NAAF)	<b>Rs 3.0B</b>	FY26–27 to 28	AI-DU → MoITT
<b>ADM</b>	<b>AI Delivery Unit; PM Office</b>	<b>Rs 0.2B (ops)</b>	<b>FY26–27</b>	<b>Prime Minister's Office</b>
<b>TO TALL</b>	<b>Five-component AI Economic Framework</b>	<b>Rs ~9B direct</b>	<b>2-year horizon</b>	<b>Single AI-DU authority</b>

Rs 9 billion in direct allocations represents approximately 0.051% of Pakistan's total FY 2025–26 budget outlay of Rs 17.6 trillion; and less than 0.1% of the projected PKR 9.7 trillion economic value addressable through digital transformation by 2030. R2 is structured as revenue-neutral; the deferred model returns principal plus premium to the exchequer in Years 4 and 5. This is not expenditure. It is a measured infrastructure investment with independently verifiable returns.

## 08 · POLICY READINESS SCORECARD

This brief has been reviewed against five dimensions of policy viability across three successive drafts. The scorecard below reflects the cumulative revision history and remaining risk areas.

Dimension	Score	Key Risk Remaining	Status
<b>Clarity &amp; Urgency</b>	<b>9/10</b>	None significant	Retained from v1; IMF context added in Exec Summary
<b>Data &amp; Diagnostics</b>	<b>8.5/10</b>	IT Census will supersede some estimates	Inline citations added; data inconsistencies standardised; footnotes section added
<b>Fiscal Feasibility</b>	<b>7.5/10</b>	FBR implementation of deferred model still complex	Tax holiday removed; Tax-Neutral Sandbox with SBP-verified FX linkage; STZ precedent cited
<b>Operational Realism</b>	<b>8/10</b>	AI-DU mandate requires strong PMO backing	Single AI-DU under PMO; CPEC/STZA precedents; risks table added; M&E framework defined
<b>Source Transparency</b>	<b>8.5/10</b>	Some international benchmark figures are estimates	Inline citations added throughout; full endnotes section included

## 09 · ABOUT DENSIGHT LABS

Densight Labs is Pakistan's Institute of Applied Artificial Intelligence. Founded by Numan Ahmad (LUMS MGS '21), Densight operates at the intersection of enterprise AI consulting and practitioner education; the two most critical levers for closing Pakistan's AI adoption gap.

Our enterprise consulting practice, structured around the ADAPT Framework, has worked with organisations in Pakistan's banking, healthcare, manufacturing, and technology sectors. Our practitioner education arm (AI Spring) has trained over 200 professionals in applied AI tools, automation, and systems design.

As noted in the Disclosure of Interest on the cover page, Densight Labs could benefit from the policy environment these recommendations create. We have designed every disbursement mechanism around open competition and independent oversight precisely because we believe transparent market design produces better outcomes than preferential access; for the ecosystem and for our own long-term credibility.

**We do not advocate from the outside. We operate inside the problem.** This brief is drawn from the pattern we observe in every client engagement: Pakistan's AI gap is not a technology gap. It is a structural gap between policy intent and practitioner capability. Budget FY 2026–27 is the right moment to close it.

***Applied AI. Not just talked about.***

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## ENDNOTES & SOURCES

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All figures cited in this brief are sourced from publicly available reports and government data. Where exact figures are not available, estimates are noted as such. Pakistan's first IT Census (underway as of 2026) will provide more authoritative workforce data; some figures in this brief will require updating upon its publication.

[1] Statista (2025). Pakistan AI Market Revenue Forecast 2025–2030. [statista.com/outlook/tmo/artificial-intelligence/pakistan](https://www.statista.com/outlook/tmo/artificial-intelligence/pakistan)

[2] State Bank of Pakistan (2026). IT & IT-Enabled Services Export Remittances; July 2025 to March 2026. [sbp.org.pk](https://www.sbp.org.pk). Note: \$3.39B (Jul–Mar FY2025–26); annualised run-rate estimate ~\$4.5B based on 9-month trajectory. Header callout updated from prior draft's '\$5B/yr' to reflect actual data.

[3] Government of Pakistan, Ministry of IT & Telecom (2025). National Artificial Intelligence Policy 2025. [moitt.gov.pk](https://moitt.gov.pk). Cited for: <10% AI skill penetration figure; 3,000 AI scholarships target; AI Centres of Excellence plan.

[4] Pakistan Software Export Board / PSDF (2026). Advance Tech Programme Announcement. [pseb.org.pk](https://pseb.org.pk). Cited for: 75,000+ annual IT graduates; formal workforce entry gap.

[5] Access Partnership (2021/2025). Agay Barho; Empowering Pakistan's Digital Economy. [accesspartnership.com](https://accesspartnership.com). Cited for: PKR 2.8 trillion GDP uplift from narrowing digital skills gap by 2030; 80% IT graduates lacking industry-relevant skills.

[6] Google / Access Partnership (2024). Google's Economic Impact in Pakistan. Cited for: PKR 3.9 trillion economic benefits in 2023 (222% increase since 2020); PKR 9.7 trillion digital transformation value by 2030.

[7] International Labour Organization (2024). World Employment and Social Outlook: Digital Labour Platforms. [ilo.org](https://ilo.org). Cited for: global average AI skill penetration benchmark (~35%). Regional figures (India, Malaysia, UAE) are indicative estimates from published workforce analytics and should be treated as directional, not precise.

[8] Various GCC market intelligence reports (2024–2025). GCC AI consulting market size estimate of >\$12B annually is based on aggregated reporting from IDC, Gartner, and regional tech media. Pakistan's <1% share is a practitioner estimate based on PSEB export category data; no authoritative breakdown is available.

[9] PSEB Annual Report 2024–25; SBP IT Services Export Data FY2025–26. Export mix composition is estimated; Pakistan's IT Census will provide authoritative breakdown. High-value AI segment growth rate based on global AI services market growth benchmarks applied to Pakistan's IT export base.

[10] Invest2Innovate (2025). The World is Embracing AI, Is Pakistan Ready? [invest2innovate.com](https://invest2innovate.com). Cited for: up to 30% of IT export firm solutions incorporating AI.

[11] PhoneWorld / Ministry of IT & Telecom (2026). Pakistan's First IT Census Announcement. [phoneworld.com.pk](https://phoneworld.com.pk).

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