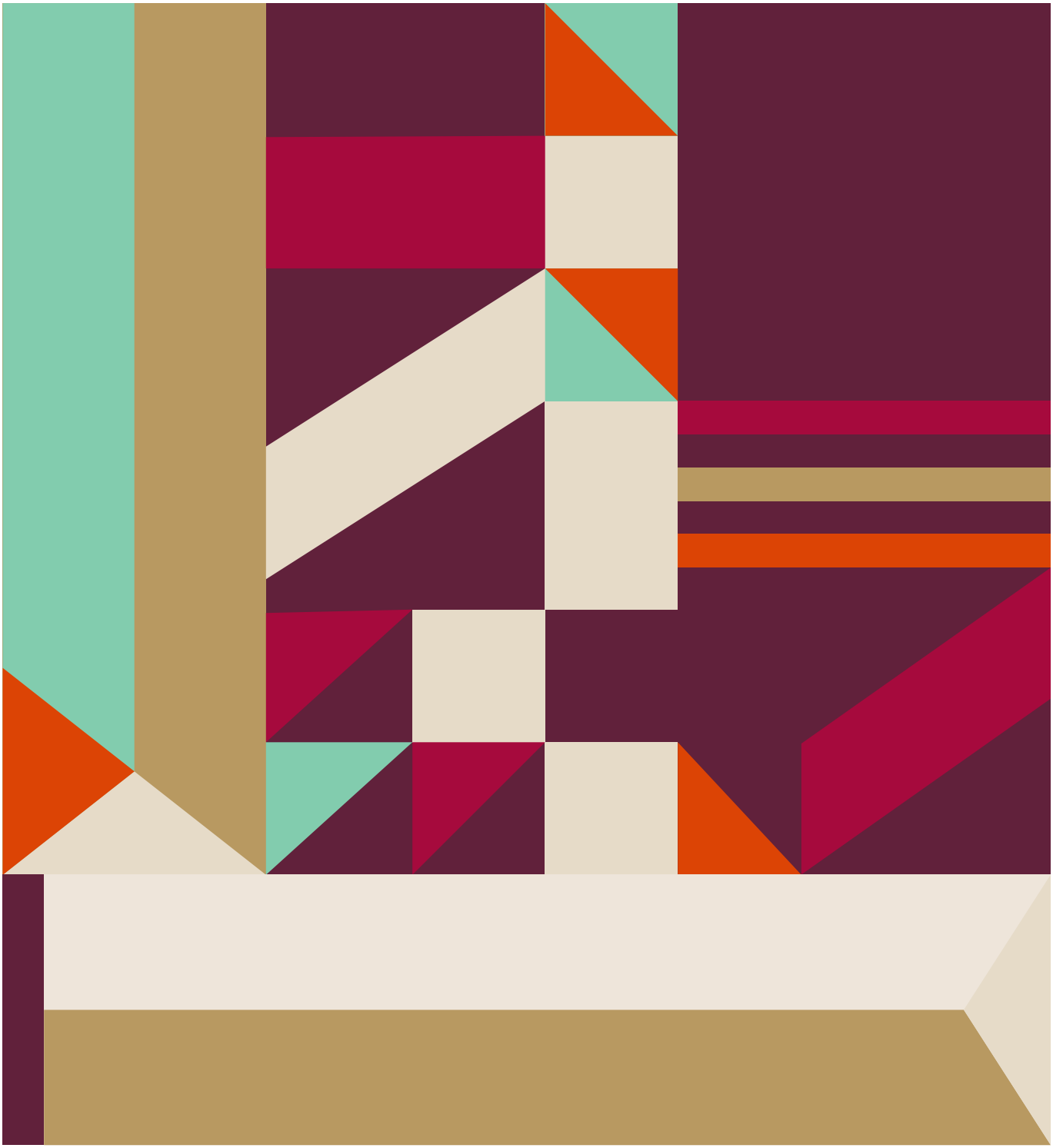

The Evolution of the G20 Digital Agenda

A Synthesised Analysis of the Presidencies of Indonesia, India, Brazil and South Africa

POLICY INNOVATION LAB

Stellenbosch UNIVERSITY IYUNIVESITHI UNIVERSITEIT

TUM THINK TANK

Technical University of Munich

GLOBAL NETWORK OF INTERNET AND SOCIETY RESEARCH CENTERS

Host and Collaborating Organisations

The Policy Innovation Lab at Stellenbosch University in collaboration with the TUM Think Tank at the Munich School of Politics and Public Policy at the Technical University of Munich, and the Global Network of Internet & Society Centers.

Editors

James Haw - Policy Innovation Lab, Stellenbosch University
Fernanda Sauca - TUM Think Tank, Munich School of Politics and Public Policy
Andras Molnar - TUM Think Tank, Munich School of Politics and Public Policy
Arfa Khan - TUM Think Tank, Munich School of Politics and Public Policy

Contributors

Markus Siewert - TUM Think Tank, Munich School of Politics and Public Policy
Willem Fourie - Policy Innovation Lab, Stellenbosch University
Armando Guio Español - Global Network of Internet & Society Centers

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Dr. Caroline Khene - Institute of Development Studies, UK
Astha Kapoor - Co-Founder, Aapti Institute
Fabro Steibel - ITS Rio
Dr. Nia Sarinastiti - M.A, Associate Professor, Atma Jaya Catholic University Indonesia

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List of Acronyms

AI — Artificial Intelligence

AU — African Union

CARE Principles — Collective Benefit, Authority to Control, Responsibility, and Ethics

CII — Critical Information Infrastructure

CoE — Centre of Excellence

DEWG — Digital Economy Working Group

DFFT — Data Free Flow with Trust

D4D — Data for Development

DPG — Digital Public Good(s)

DPI — Digital Public Infrastructure

GDPIR — Global Digital Public Infrastructure Repository

G20 — Group of Twenty

G7 — Group of Seven

IHRL — International Human Rights Law

ITU — International Telecommunication Union

LMICs — Low- and Middle-Income Countries

MSMEs — Micro, Small, and Medium-sized Enterprises

NEET — Not in Employment, Education, or Training

OFA — One Future Alliance

OECD — Organisation for Economic Co-operation and Development

SDGs — Sustainable Development Goals

T20 — Think Tank 20

TPAF — Technology Policy Assistance Facility

UN — United Nations

UNDP — United Nations Development Programme

UNESCO — United Nations Educational, Scientific and Cultural Organisation

Executive Summary

This report offers a comprehensive comparative analysis of the digital agendas from the recent G20 presidencies of Indonesia, India, Brazil, and South Africa. It traces the evolution of global digital policy by focusing on three core pillars that have shaped a substantial part of the international discourse: **Digital Transformation, Digital Public Infrastructure (DPI), and Artificial Intelligence (AI)**. By examining the continuity and shifts across these presidencies, the report provides an evidence base to inform the trajectory of future multilateral digital cooperation.

Based on a synthesis of official G20 and T20 documents, this analysis traces a period of rapid and substantial evolution in G20 digital policy. We can trace this progression from Indonesia's post-pandemic emphasis on inclusive recovery and digital capacity, to India's development of structured frameworks and implementation mechanisms, and Brazil's focus on social justice, human rights, and global equity within the digital sphere. Finally, we look into the recent South African presidency—the first on the African continent—which centred on "Solidarity, Equality, and Sustainability," prioritising the "AI for Africa" initiative, the public value of DPI, and universal equitable inclusion with the aim of leaving no region behind.

The synthesis and drafting of this report were carried out with the support of AI tools, under the supervision and validation of the authors, who retain full responsibility for its content and conclusions. Primary documents were manually collected from official G20 and T20 websites and the G7/G20 database, and findings were triangulated through learning calls with experts involved in the T20 tracks across the respective G20 presidencies.

The analysis is organised around three thematic areas reflecting their prominence and frequency within the G20 digital policy agenda:

The broad domain of **digital transformation** evolved significantly over the period under review. **Connectivity emerged as a central theme**, articulated through Indonesia's emphasis on "people-centred connectivity," Brazil's focus on "meaningful connectivity" supported by actionable metrics, India's framing of connectivity as a prerequisite for meaningful digital transformation, and South Africa's call for "universal and equitable digital inclusion." The latter placed particular emphasis on strengthening digital innovation ecosystems for Micro, Small, and Medium-sized Enterprises (MSMEs) and addressing non-infrastructural barriers to participation. In parallel, discussions on **data governance and privacy** expanded and deepened. The agenda progressed from an initial focus on Data Free Flow with Trust (DFFT) to encompass Data for Development (D4D), the public value of data, and, under South Africa's presidency, data governance frameworks aimed at supporting equitable and inclusive AI.

The concept of **DPI** evolved from an implicit set of "enablers" for digital services under Indonesia (notably for digital identity and health) to become the central, formally defined cornerstone of the digital agenda under India. The **G20 Framework for Systems of DPI provided a recognised definition among the G20 group**, structured around technology, governance, and community. Brazil subsequently emphasised **rights-based governance**, while South Africa introduced the **"Public Value Measurement Framework,"** focusing on the tangible socio-economic benefits and integrated governance of DPI.

The evolution of **AI governance** progressed from a broader element of digital transformation under Indonesia to a principles-based framework under India, which **affirmed the G20 AI Principles** and linked them to the Sustainable Development Goals (SDGs). Brazil then focused on framing AI as a structural issue of **global equity and human rights**. South Africa advanced this by launching **the "AI for Africa Initiative"** and the **"Technology Policy Assistance Facility (TPAF),"** specifically targeting the global digital divide, capacity building in the Global South, and the development of indigenous data ecosystems.

Introduction

The central finding of this synthesis is the clear and rapid evolution of the G20's digital agenda. This evolution can be characterised in stages:

Indonesia

Under the theme "Recover Together, Recover Stronger," the Indonesian presidency prioritised inclusive recovery through digital participation via connectivity, digital skills and literacy, and DFFT. The focus was on working towards bridging the digital divide through "people-centred connectivity," enhancing digital skills for vulnerable groups, and strengthening dialogues on data governance.

India (2023)

Guided by the theme "One Earth, One Family, One Future," the Indian presidency provided the formal architecture for the G20's digital ambitions, most notably by championing and defining DPI as a scalable model for development. This was complemented by tangible outputs, including the G20 Toolkit on Cyber Education, a Global Digital Public Infrastructure Repository (GDPIR), and a proposed One Future Alliance (OFA).

Brazil (2024)

With "Building a just world and a sustainable planet" as its overarching vision, the Brazilian presidency explicitly linked the digital agenda to its core priorities of combating inequality and promoting social justice. It advanced the discourse by introducing robust, rights-based governance principles for DPI and AI (including "agile governance" tools), tackling the "global AI divide," and placing complex issues like information integrity and platform accountability at the centre of G20 discussions.

South Africa (2025)

Rooted in "Solidarity, Equality, and Sustainability," the South African presidency—the first in Africa—anchored the digital agenda in the philosophy of "Ubuntu" ("I am because we are"). It prioritised the specific developmental needs of the Global Majority, particularly Africa. Key contributions included the "Universal and Equitable Digital Inclusion Framework," the "AI for Africa Initiative," and a focus on measuring the "public value" of DPI. The presidency emphasised bridging the "AI divide" through sovereign capabilities, representative datasets, and computing infrastructure.

1. Digital Transformation

Across the G20 presidencies, the digital divide agenda evolved from expanding access to ensuring quality, inclusion, and empowerment. Indonesia emphasised people-centred connectivity for resilience and equal opportunity; India integrated connectivity within DPI and skilling frameworks; Brazil advanced the concept of "universal and meaningful connectivity," linking access with safety, affordability, and user experience; and South Africa broadened the scope to "Digital Innovation Ecosystems," focusing on MSMEs and the creation of value within developing economies.

The Changing Policy Trajectory of Digital Inclusion in the G20

The challenge of bridging the digital divide remained a constant, but its conceptual framing evolved significantly across the presidencies.

Indonesia championed "people-centred digital connectivity"—a concept introduced to highlight connectivity's role as a social enabler for post-pandemic resilience, essential for accessing services like education and healthcare. The approach was supported by the *Stocktaking on the Extended Concept and Shared Understanding of Digital Connectivity*, a collection of policies to improve the participation of people in vulnerable situations and underrepresented groups, as well as a report on key enablers for digital identity.

Indonesia's call for a global dialogue on digital development recognised that while private investment leads, public-private partnerships are vital in underserved areas. Digital infrastructure underpins progress in education, healthcare, and agriculture, making connectivity essential for equal opportunity. Complementary initiatives like the T20's call for two-way digital communication channels and Smart Village programmes underscored the need for innovation-driven, locally grounded solutions. To showcase progress, Indonesia launched the G20 Digital Innovation Network and Digital Transformation Expo as a segway to promote collaboration across the global digital ecosystem.

India did not treat connectivity as a standalone priority, but rather embedded it within the DPI and skilling frameworks as a way to "provide equitable access to public and/or private services at societal scale." This approach was presented as a mechanism to accelerate digital transformation through a "whole-of-society approach", assuming connectivity as a prerequisite, with the primary focus being on the services (DPI) and skills that operate on top of it. To guide this, India launched the *G20 Toolkit for Designing and Introducing Digital Upskilling and Reskilling Programmes*, a collection of best practices and case studies offering a strategy to identify emerging technologies, assess skills needs, promote short-term training, and invest in qualified trainers.

Complementing this, experts called for a global framework to close information and labour market gaps using digital platforms that provide real-time, disaggregated data on skills demand. To improve comparability across nations, India also introduced the *G20 Roadmap to Facilitate the Cross-Country Comparison of Digital Skills*, outlining shared principles for defining, measuring, and verifying digital competencies. To sustain these initiatives, the presidency proposed establishing a virtual Centre of Excellence (CoE) under UNESCO, serving as a global repository for effective digital skilling practices and collaboration.

Brazil advanced the discourse to "universal and meaningful connectivity"—expanding access to focus more on the quality of the user experience. Meaningful connectivity was defined as a "safe, satisfying, enriching, and productive online experience at an affordable cost." This was made actionable through the *G20 Guidelines on Indicators and Metrics for Universal and Meaningful Connectivity*—a concrete policy tool for measuring six dimensions around connectivity: connection quality, availability for use, affordability, devices, digital skills, and (digital) security.

The Digital Economy Working Group (DEWG) also underscored that digital literacy and skills are vital to "fully and safely engage in the digital world through critical thinking, creativity and problem-solving capabilities"—an approach aligned with recommendations to promote community-based digital literacy strategies, moving beyond formal education programmes. To address the financial barriers to digital infrastructure, the presidency convened workshops on universal connectivity and digital infrastructure investment, highlighting the importance of diverse financing sources. It also reaffirmed the G20's commitment to halve the gender digital divide by 2030.

Brazil's second digital agenda pillar centred on the role of government and DPI in driving a "human-centric, safe, secure, trusted, sustainable, development-oriented digital transformation." Building on previous G20 frameworks, the presidency highlighted the value of DPI-based digital government services in improving public sector responsiveness, transparency, and reliability. Initiatives like Conecta gov.br were highlighted for linking government data to support better internal operations and service delivery.

A key focus was digital identification, recognised as an entry point for digital inclusion and a means to advance SDG 16.9. In partnership with the OECD, Brazil developed the *G20 General Principles on the Governance of Digital Identity*, promoting user-centred, rights-based, and inclusive digital ID systems. Importantly, these principles also emphasised maintaining non-digital alternatives to ensure no one is excluded from essential services.

South Africa anchored its digital transformation agenda in "universal and equitable digital inclusion," with a special focus on "Digital Innovation Ecosystems" specifically designed to unleash the potential of MSMEs. Recognising MSMEs as the backbone of African and developing economies, the presidency emphasised that digital inclusion must translate into economic participation.

This effort was operationalised through the *Universal and Equitable Digital Inclusion Framework*, which aims to enable policy makers to identify gaps and prioritise actions addressing not just infrastructure, but also non-infrastructural restrictions such as skills, safety, and energy gaps. South Africa uniquely highlighted the interdependence of digital and energy infrastructure, noting that stable power supply is a prerequisite for digital inclusion.

Furthermore, South Africa introduced a focus on "Digital Innovation Ecosystems," advocating for multi-stakeholder collaboration to support start-ups and MSMEs. This included the *ITU Foresight Study on Shaping the Future of SMEs and Startups*, which provided strategic insights for developing conducive policy environments. The presidency also reinforced the commitment to halving the gender digital divide by 2030 and welcomed the "Nelson Mandela Bay Target" to reduce the rate of young people not in employment, education, or training (NEET) by 5% by 2030, leveraging digital skills as a key enabler.

Connectivity evolved from being viewed as a social enabler for post-pandemic recovery to conceiving it as a holistic, measurable, and human-centered development outcome, and ultimately as a prerequisite for equitable economic participation and MSME advancement.

Broadening the Scope of Data Governance and Privacy

The different G20 presidencies broadened the scope of data governance and privacy by moving from dialogue on regulatory commonalities toward more structured approaches that link data use with development, security, public value, and AI equity.

Indonesia's agenda was framed by the established concept of DFFT. The approach was cautious, focused on fostering a "multi-stakeholder dialogue" to find "commonalities" and "complementarities" between different national data governance regimes. The presidency focused on deepening discussions on the practical aspects of DFFT and identifying common ground across different regulatory approaches. This was undertaken with the recognition that complex issues such as privacy, personal data protection, intellectual property, and security must be addressed in line with relevant international and domestic legal frameworks and legitimate public policy objectives.

Indonesia also explored practical tools like model contractual clauses for managing cross-border data flows. This was especially relevant given Indonesia's limited open data access compared to other G20 countries, highlighting the need for a more fair and open data ecosystem. Indonesia also proposed three key principles—lawfulness, fairness, and transparency—to guide data sharing across borders. While not binding, these ideas helped move the discussion toward greater trust and cooperation in how countries manage and exchange data.

India reaffirmed DFFT but placed a stronger emphasis on Data for Development (D4D), focusing on data as the enabler for DPI. The presidency also introduced a new, distinct focus on security, resulting in the *G20 High-Level Principles to Support Businesses in Building Safety, Security, Resilience, and Trust*. These principles focused on promoting a "human-centric culture of security and trust" through measures like cyber hygiene, adopting a 'security by design' approach, fostering multi-stakeholder cooperation, and building capacity—with a specific focus on supporting MSMEs. Another key outcome under this priority was the *G20 Toolkit on Cyber Education and Cyber Awareness for Children and Youth*, which provides actionable recommendations for policy makers to improve child online safety.

Similar to Indonesia's presidency, **Brazil** underscored the public value of data, advocating for greater data access and sharing between sectors to advance public interest. Complementing this, the T20 called for principles on data justice, interoperability, and openness to guide DPI governance. In terms of cross-border data flows, the G20 reaffirmed its support for DFFT, balancing openness with respect for national legal frameworks. To operationalise this, Brazil introduced a *G20 Compendium on Data Access and Sharing*, providing guidance for collaboration between public and private sectors.

South Africa explicitly linked data governance to the equitable development of AI. The presidency emphasised "Data Governance as a foundation for equitable AI," highlighting that access to high-quality, representative, and multilingual datasets is essential for preventing bias and ensuring AI benefits the Global Majority. To support these efforts, the presidency produced the *Annex on Data Governance Priorities for Equitable and Sustainable AI* and the *Guidelines for access to data for MSMEs and researchers*.

South Africa also championed the concept of "sovereign AI capabilities" —a nation's ability to govern its own data. The presidency encouraged the development of data sharing infrastructure initiatives such as "data pools" to facilitate external data partnerships for MSMEs and AI startups, creating a level playing field for all stakeholders. Furthermore, the presidency highlighted the importance of indigenous data governance, referencing the CARE principles (Collective Benefit, Authority to Control, Responsibility, and Ethics), moving the debate towards data sovereignty and cultural preservation.

The data governance and privacy agenda has expanded to encompass security, development, and public value. Across presidencies, this shift reflects efforts to balance data flows, trust, and access, linking digital progress with security, inclusion, responsible data use, and AI equity.

2. Digital Public Infrastructure

The concept of DPI provides the clearest example of policy evolution, maturing from a background concept of 'enablers' to the central, framework-defined pillar of the G20's digital development strategy, and finally, to a focus on public value measurement.

During the **Indonesian** presidency, the term "Digital Public Infrastructure" was not a central organising principle. Instead, the focus was on the foundational components and enablers that would later be understood as DPI, framed by the post-pandemic recovery theme.

The agenda emphasised "people-centred" digital transformation and produced foundational reports identifying key enablers for digital services. The *Report on Identifying Key Enablers on Digital Identity* was a key output, stressing four enablers: (1) effective design, (2) collaboration and coordination, (3) sustainable investments, and (4) a fit-for-purpose regulatory framework. This period also saw a focus on practical, sectoral applications, such as supporting "trusted global digital health networks" and building on the success of "digital COVID-19 certificates," which served as real-world precedents for interoperable DPI.

Indonesia established the conceptual groundwork and socialised core ideas like digital identity and digital health certificates, which served as real-world precedents for interoperable DPI.

India marked a decisive shift by making DPI a cornerstone of its G20 digital agenda, leveraging its domestic experience with the "India Stack". India's primary achievement in this regard was securing G20 consensus on the *G20 Framework for Systems of Digital Public Infrastructure*—providing a recognised definition of DPI within the group as "a set of shared digital systems built on open standards and specifications". It structured the concept around three pillars: technology, governance, and community. The framework was guided by principles including inclusivity, interoperability, security, and respect for human rights.

However, India also moved beyond principles to propose concrete, action-oriented mechanisms to support knowledge sharing and global capacity development:

- The **Global Digital Public Infrastructure Repository (GDPIR)**, a virtual repository to share best practices and resources, and;
- The proposed **One Future Alliance (OFA)**, a voluntary initiative to provide technical assistance and funding to support DPI implementation in LMICS.

Brazil's presidency inherited the formal DPI framework from India and built directly upon it, with a distinctive shift in focus towards governance, social justice, and human rights. While India provided the 'what' and 'how' of DPI, Brazil concentrated on the 'why' and the 'with what safeguards'.

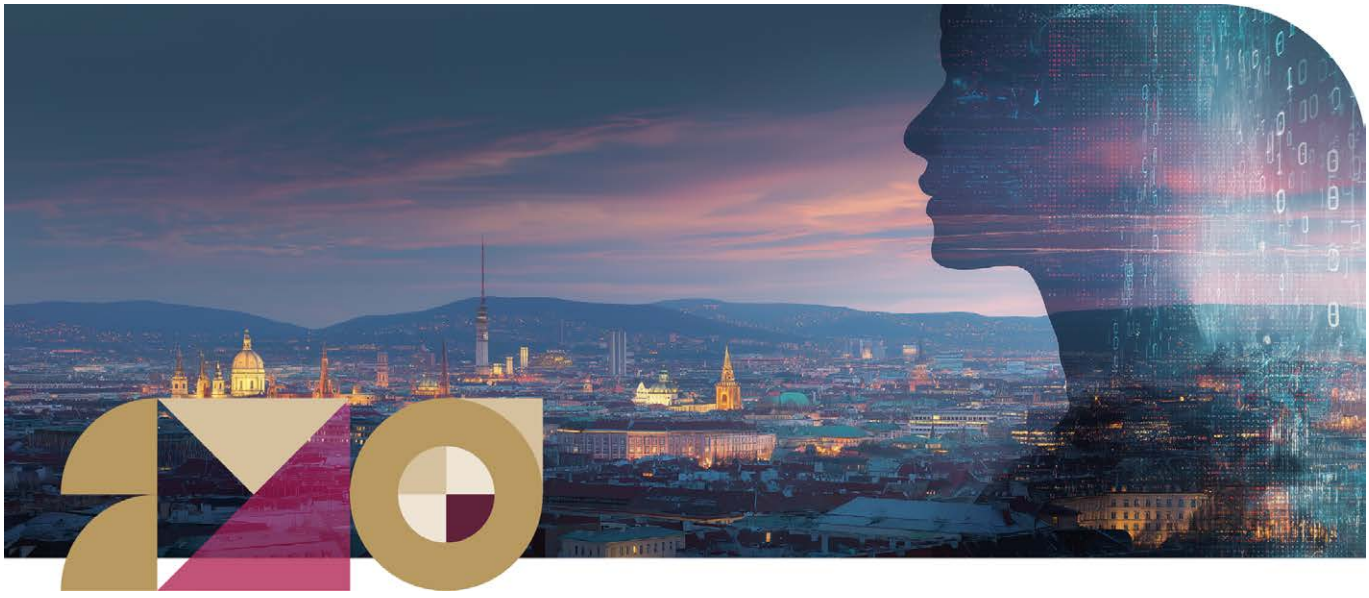
Acknowledging the G20 framework, Brazil's agenda sought to embed DPI within its overarching mission to combat inequality. The most significant output in this domain was the *G20 General Principles on the Governance of Digital Identity*. This document advanced the normative dimension of DPI, establishing a framework to ensure such systems are user-centric, inclusive, and protective of privacy and fundamental rights.

A critical principle championed by Brazil was the insistence on preserving non-digital alternatives. This safeguard ensures that access to essential services is not denied to individuals who either cannot or choose not to use a digital identity solution.

As global discussions evolved during this time, DPI also took on a geopolitical dimension, becoming intertwined with questions of digital sovereignty amid growing dependence on foreign technologies—concerns intensified by the Ukraine war and renewed emphasis on technological self-reliance. This shift has drawn European interest, exemplified by France-India collaborations, as countries seek greater control over their digital ecosystems. For instance, the T20 discourse under Brazil introduced the "inherent conceptual tension between DPI and CII (Critical Information Infrastructure)," pushing the G20 to consider how to balance the developmental goals of openness with security imperatives.

During its 2025 presidency, **South Africa** focused on the tangible impact and integrated governance of DPI. The presidency introduced the *DPI Public Value Measurement Framework*, a voluntary tool designed to map the potential effects of DPI investments across industry and society. This marked a shift from defining DPI to measuring its socio-economic efficacy, helping governments align digital investments with national strategic development goals.

South Africa also emphasised the governance aspect through the *Guidelines for Integrated Governance of DPI*. This resource supports countries in designing flexible, non-prescriptive governance frameworks that ensure transparency, accountability, and the protection of rights. The presidency reinforced the importance of DPI being "tailored to each member's national context" and "respecting diversity," moving away from a one-size-fits-all approach. Moreover, South Africa launched a global call for DPI innovations in partnership with the African Union (AU), International Communication Unit (ITU), and United Nations Development Programme (UNDP), specifically to curate practical use cases of people-centred DPI, thereby operationalising the concept for the African context.



3. Artificial Intelligence

AI governance at the G20 evolved from an integral element of digital transformation under Indonesia to a central, rights-based priority under Brazil, and finally to a targeted developmental initiative for the Global Majority under South Africa. India established principles for safe, human-centric, and SDG-aligned AI; Brazil emphasised social justice and global equity; and South Africa launched concrete mechanisms to bridge the "AI divide" in Africa.

Under the **Indonesian** presidency, AI was not treated as a standalone policy issue. Instead, it was framed as an "emerging technology" and one element within the broader digital transformation agenda, with a focus on establishing the prerequisites for its adoption.

The presidency's agenda prioritised establishing these prerequisites:

- A focus on digital skills, identifying the "increasing demands... for a workforce adept at utilising emerging technologies, such as artificial intelligence" and leading to the *G20 Toolkit for Measuring Digital Skills and Digital Literacy*.
- Advancing data governance, viewing the dialogue on DFFT as a necessary foundation for AI systems.
- Grounding the discussion in practical application, discussing AI in sector-specific contexts like Smart Cities and the empowerment of MSMEs.

Drawing on its own Garuda Smart City Framework, Indonesia promoted sharing experiences and developing common standards to attract innovation and investment. AI was also linked to sustainable mobility, with applications like smart traffic systems, intelligent transport networks, and mobility-as-a-service platforms that can reduce congestion and emissions.

Framing AI as a practical tool for development, Indonesia emphasised the need for safe and secure digital services and the inclusion of small businesses, positioning AI as a driver of inclusive growth. By improving access to technology and markets, AI can enable MSMEs to compete, innovate, and participate more fully in the global digital economy. G20 members also welcomed Indonesia's efforts to support the meaningful digital participation of MSMEs, including those in rural and remote areas.

The broader T20 discourse also included more ambitious proposals, such as a call to "formulate The Treaty of Basic Principles on the Use of Artificial Intelligence as International Law," indicating a wider range of thinking on the topic, even if the formal agenda remained pragmatic.

India's presidency significantly elevated AI as a key topic in its agenda. The G20 New Delhi Leaders' Declaration articulated a clear, principles-based vision for AI governance, aiming to "leverage AI for the public good" in a "responsible, inclusive, and human-centred way". This signaled a shift from broad endorsement to clearer policy direction, as AI governance became a regular G20 priority. Since 2019, the G20 AI Principles have guided ethical and secure AI development, though they gave limited attention to distributional impacts and power dynamics. India's 2023 call for a Responsible Human-Centric AI framework offers a key opportunity to embed human rights from the outset and shape wider governance efforts.

This meant establishing a global consensus on a balanced, pro innovation governance approach. The presidency secured a shared G20 position on the key principles for "safe, secure, and trustworthy AI," including respect for human rights, transparency, fairness, accountability, privacy, and human oversight—initially drawn from the 2019 OECD Recommendation on AI.

India's presidency advanced a global consensus on a pro-innovation AI governance approach grounded in human rights, transparency, fairness, accountability, and oversight, building on but extending the 2019 G20 AI Principles.

Brazil adopted a normative, structural, and legally grounded approach, emphasizing that International Human Rights Law (IHRL) should serve as the core foundation of AI governance. The presidency further framed AI governance as an issue of social justice and global equity. It emphasised concerns that AI could "deepen global inequality" and that its governance was being dominated by "a small number of nations". To counter this, Brazil's approach not only aimed at tackling the misuse of AI, but also the opportunity costs of "missed use," ensuring that AI benefits could be more widely and equitably realised.

Brazil's approach was normative, structural, and legally grounded, asserting that IHRL must be the essential foundation for AI governance.

Key features of this rights-based agenda included:

- Addressing the global AI divide by championing the inclusion of the Global Majority in governance processes to prevent "digital colonialism".
- Promoting agile governance through specific regulatory tools, such as "regulatory sandboxes" for co-creating rules and mandatory, independent audits and "fundamental rights impact assessments" for high-risk systems.
- Pursuing the democratisation of AI by calling for large-scale public investment in open-source AI models as "Digital Public Goods (DPGs)" and public datasets, and even floating ideas like a "CERN for AI," to counter the concentration of power within the private sector.

The presidency also framed AI as a catalyst for economic growth and social progress and reaffirmed global commitments such as the G20 AI Principles and the UNESCO Recommendation on the Ethics of AI. This vision was reinforced by the T20's call for a global AI accountability framework that aligns technical, policy, and regulatory efforts, and by G20 Leaders' commitment to inclusive international cooperation that amplifies voices from developing countries.

To advance this agenda, Brazil, in collaboration with UNESCO, developed the *Enabling Resources for the Development, Deployment, and Use of AI for Good and for All* recommendations, aimed at strengthening AI-enabling environments, supporting developing countries, and fostering agile governance frameworks. Complementary initiatives included a *Toolkit for AI Readiness and Capacity Assessment*, a report mapping AI adoption in public services, and a G20 side event on harnessing AI for social equity and sustainable development.

Recognising AI's growing role in shaping the information ecosystem, Brazil called for ethical, transparent, and accountable AI tools for content moderation and creation accompanied with human oversight. Brazil launched the *Global Initiative for Information Integrity on Climate Change* in partnership with the UN and UNESCO, positioning information integrity as both a democratic and developmental priority in the digital age.

Part of the broader agenda on information integrity under its presidency, Brazil warned how AI and digital communication can contribute to accelerating misinformation and hate speech, ultimately leading to the erosion of trust in institutions. The Rio Leaders' Declaration echoed this, calling for transparency and accountability from platforms. With UNESCO, Brazil launched *Promoting Information Integrity and Trust in the Digital Environment*, outlining five government priorities: media literacy, sustainable content, platform transparency, improved governance, and market incentives for integrity based practices.

South Africa focused its AI agenda on "Equitable, Inclusive, Trustworthy and Sustainable Artificial Intelligence," with a specific emphasis on the African continent. The presidency established a dedicated *Task Force on Artificial Intelligence, Data Governance and Innovation for Sustainable Development* and launched the **AI for Africa Initiative**. This voluntary platform for multilateral cooperation aims to promote access to computing power, AI talent, and high-quality representative datasets in Africa.

South Africa's approach was characterised by a drive for "sovereign AI capabilities," encouraging the development of Africa-centric AI models based on long-term partnerships that generate sustainable value on the continent. Key outputs included:

- The Technology Policy Assistance Facility (TPAF), established by UNESCO to support countries in shaping AI policies.
- The *Toolkit to Reduce Inequalities Connected to the Use of Artificial Intelligence*, a practical resource for informing policy from design to deployment.
- A strong emphasis on multilingual and multicultural representation, promoting the creation of datasets in indigenous languages to ensure AI respects diversity and delivers real value for local communities.

The presidency also addressed the integrity of information issue, noting the threat of deepfakes and misinformation. It encouraged technical detection measures and digital literacy, leveraging the role of media in alerting the public. By explicitly linking AI development to the AU Agenda 2063, South Africa positioned AI not just as a global technological trend, but as a critical lever for African industrialisation and women's empowerment.

Conclusion

The provided synthesis shows the clear evolution in the G20's digital policy agenda from 2022 to 2025. This period marks crucial transitions for global digital governance where discourses matured along three core pillars:

1 Digital Transformation

Digital transformation evolved from **"people-centred connectivity"** to the quality focused benchmark of **"universal and meaningful connectivity,"** and finally to **"universal and equitable digital inclusion"** with a focus on MSME ecosystems and non-infrastructural barriers.

Simultaneously, **data governance** emerged from DFFT to encompass the dimensions of development (D4D), security, public value, and finally, data sovereignty for equitable AI.

2 Digital Public Infrastructure (DPI)

Digital public infrastructure was established as a **significant transformative policy concept**, shifting from a **collection of enablers** for the digital transformation agenda, to a globally recognized, formally defined **cornerstone of development**, and subsequently to a measurable asset evaluated by its **public value and integrated governance**.

3 Artificial Intelligence (AI)

AI governance transitioned from an **ancillary element of digital transformation** to a **central issue of global equity**.

The successive presidencies established the consensus for **safe, secure, and SDG aligned AI**, highlighted concerns surrounding the **global digital AI divide**, and launched specific mechanisms like the **"AI for Africa Initiative"** to address these disparities.

Taken together, this trajectory reaffirms the G20's unique role as a platform for fostering mutual understanding, sustained dialogue, and enhanced cooperation on technology governance among countries with diverse regulatory traditions. By addressing complex issues such as digital inclusion, data flows, and AI governance, the G20 has helped lay the foundations for greater interoperability between differing policy approaches and technological systems.

Looking ahead, the central challenge for future G20 presidencies will be to build on and safeguard this collective progress while navigating an increasingly complex and dynamic global context. Progress will likely depend on incremental advances in translating shared principles and frameworks into practical, measurable outcomes, as well as on continued dialogue to maintain cooperation on data regulation and digital governance. In this environment, the G20's convening role remains particularly valuable in fostering pragmatic coalitions and voluntary cooperation, supporting a degree of alignment among national approaches and contributing, over time, to a more human-centric digital future.

Annexure

The following tables provide a summarised comparison of the key policy pillars identified and their evolution across the four presidencies.

DIGITAL TRANSFORMATION

Dimension	Indonesia (2022)	India (2023)	Brazil (2024)	South Africa (2025)
Core framing	People-centred connectivity for post-pandemic recovery	Connectivity embedded within DPI and service delivery	Universal and meaningful connectivity focused on quality, safety, and affordability	Universal and equitable digital inclusion linked to economic participation
Role of data	DFFT-based dialogue on cross-border data flows	Data for Development (D4D) enabling service delivery	Data as public value supporting inclusive digital transformation	Data access as prerequisite for MSME participation
Primary policy focus	Expanding access and participation	Scaling digital services and digital skills	Improving quality of access through metrics and safeguards	Enabling MSME-led digital innovation ecosystems
Governance logic	Multistakeholder dialogue and coordination	Framework-driven implementation	Rights-based governance with measurable indicators	Integrated, cross-sectoral inclusion frameworks
Key evolution introduced	Access → participation	Participation → services	Services → quality	Quality → value creation

DIGITAL PUBLIC INFRASTRUCTURE

Dimension	Indonesia (2022)	India (2023)	Brazil (2024)	South Africa (2025)
Status of DPI	Implicit digital enablers	Formalised global DPI framework	Normative and governance-driven DPI	DPI as measurable public-value asset
Role of data	Foundational enabler for digital identity and health systems	Core resource for scalable public services	Public-interest data access and stewardship	Flexible, tailored data governance
Core contribution	Identification of key digital enablers	G20 Framework for Systems of DPI	General Principles on the Governance of Digital Identity	DPI Public Value Measurement Framework
Governance emphasis	Pragmatic, sector-specific	Standardisation, interoperability, scalability	Human rights, inclusion, accountability	Integrated, context-specific governance
Key evolution introduced	Enablers → systems	Systems → governance	Governance → legitimacy	Legitimacy → measurable impact

ARTIFICIAL INTELLIGENCE

Dimension	Indonesia (2022)	India (2023)	Brazil (2024)	South Africa (2025)
Positioning of AI	Emerging technology within digital transformation	Central governance priority	Structural issue of global equity and justice	Developmental capability for the Global Majority
Role of data	DFFT dialogue as foundation for AI	Data availability and security for responsible AI	Public datasets and equitable data access	Representative, multilingual, sovereign datasets
Primary governance lens	Skills development and sectoral use cases	Responsible, human-centric, SDG-aligned AI	Rights-based, legally grounded governance	Sovereign and inclusive AI ecosystems
Key governance tools	Digital skills toolkits and pilots	Reinforced G20 AI Principles	Regulatory sandboxes, audits, public AI investment	AI for Africa Initiative, TPAF
Key evolution introduced	Adoption → principles	Principles → accountability	Accountability → redistribution	Redistribution → capability-building