
Accelerating digital industries in the GCC and wider MENA region

Trends shaping the B2B opportunity



The GSMA is a global organisation unifying the mobile ecosystem to discover, develop and deliver innovation foundational to positive business environments and societal change. Our vision is to unlock the full power of connectivity so that people, industry, and society thrive. Representing mobile operators and organisations across the mobile ecosystem and adjacent industries, the GSMA delivers for its members across three broad pillars: Connectivity for Good, Industry Services and Solutions, and Outreach. This activity includes advancing policy, tackling today's biggest societal challenges, underpinning the technology and interoperability that make mobile work, and providing the world's largest platform to convene the mobile ecosystem at the MWC and M360 series of events.

We invite you to find out more at [gsma.com](https://www.gsma.com)

GSMA Intelligence

GSMA Intelligence is the definitive source of global mobile operator data, analysis and forecasts, and publisher of authoritative industry reports and research. Our data covers every operator group, network and MVNO in every country worldwide – from Afghanistan to Zimbabwe. It is the most accurate and complete set of industry metrics available, comprising tens of millions of individual data points, updated daily.

GSMA Intelligence is relied on by leading operators, vendors, regulators, financial institutions and third party industry players, to support strategic decision-making and long-term investment planning. The data is used as an industry reference point and is frequently cited by the media and by the industry itself.

Our team of analysts and experts produce regular thought-leading research reports across a range of industry topics.

www.gsmaintelligence.com

info@gsmaintelligence.com

Author

Pablo Iacopino, Head of Research and Commercial Content

CONTENTS

- 1 Executive summary
- 2 Digital transformation of industries and countries
- 3 Technologies enabling digital transformation
- 4 Enterprise spend on digital transformation and the B2B opportunity
- 5 Countries at a glance
- 6 Survey details

The rise of digital industries in the GCC and wider MENA region

Key findings from the 2025 enterprise survey

During June–August 2025, GSMA Intelligence surveyed more than 850 enterprises across 10 vertical sectors in eight MENA countries to gain insight into their digital transformation. This formed part of a wider survey covering 5,320 enterprises in 32 countries, including both developed and developing countries. The eight MENA countries surveyed included three from the GCC (Qatar, Saudi Arabia and UAE) and five from the wider MENA region (Egypt, Iraq, Morocco, Tunisia and Türkiye).

This report focuses on the GCC and wider MENA region (including comparisons with global trends), highlighting the key findings and implications. A global report and interactive dashboard will be published later in 2025, providing access to full insights and data by country and vertical sector, including filters by enterprise size and status of digital transformation.

1

Leading on digital transformation: three GCC countries in the top seven. Looking at overall digital transformation scores, the three GCC countries (Qatar, Saudi Arabia and the UAE) are in the top seven of the 15 developed countries surveyed. This confirms that the GCC plays an important role as a leading (and benchmark) region on digital transformation, offering a favourable environment for developing and scaling new technologies and innovations. Among the 17 developing countries surveyed, Türkiye is in the top five for digital transformation, and Morocco is in the top 10. Across MENA, the top three vertical sectors leading on digital transformation are financial services, retail, and manufacturing and industrial. The agriculture, forestry and fishing sector is at the bottom. All vertical sectors show an eagerness to accelerate their digital transformation, but investment budgets vary.

2

Investing for growth: enterprise spend on digital transformation at 10% of revenues. There is a consensus among enterprises in the GCC and wider MENA region that digital transformation brings multiple benefits, with enhanced security the top objective in five of the eight countries surveyed. Beyond security, revenue-related objectives are deemed slightly more important than cost-related objectives. To capture the benefits, MENA enterprises will spend 10% of their revenues on digital transformation during 2025–2030. As expected, the bigger the enterprise, the higher the spend. At the same time, MENA enterprises are expecting a 200% return on investment on digital transformation spend, with an average timeline for return on investment (RoI) of 4.7 years (4.2 years in the GCC).

The rise of digital industries in the GCC and wider MENA region

Key findings from the 2025 enterprise survey

3

AI and connectivity the leading areas of spend for 2025–2030. This comes as no surprise given the consensus among GCC and MENA enterprises that AI will have a significant impact across several business areas, with productivity/efficiency gains and enhanced security leading. Across MENA, most enterprises undertaking digital transformation already use generative AI (genAI), but only 39% are currently making advanced use of it, leaving room for growth. Globally, Qatar and the UAE are among the leading countries for enterprises making advanced use of genAI. 5G is seen as important in all MENA countries and sectors. For 5G use cases (e.g. FWA, IoT, network APIs, private networks) and new network technologies (e.g. edge and slicing), GCC enterprises lead on impact expectations. This reflects the recent progress made by operators and vendors driving the deployment of 5G standalone networks.

4

Technology integration more important than ever. GCC and MENA enterprises work with a range of suppliers of digital transformation technologies and solutions, including operators. Diversity of choice is good for enterprises but also for suppliers, as it allows the development of long-term partnerships in the value chain. Generalists (hyperscalers and telecoms network/equipment vendors) tend to be the preferred partners for digital transformation – unsurprisingly, as they boast global reach, larger sales teams and more comprehensive/integrated portfolios of B2B services and capabilities. As cost of implementation and complexity of tech integration (highly interrelated) are key deployment challenges faced by enterprises in MENA, the role of the tech orchestrator will become even more important in the future, providing new opportunities for suppliers, including operators.

5

Three B2B opportunities for operators. To capture a part of the growing B2B market opportunity, GCC and MENA operators can pursue three strategies: targeting growth beyond connectivity either by focusing on selected technologies/services or through a cross-service horizontal approach (the latter involves a tech orchestrator role), or moving one step higher to be the go-to, long-term digital transformation partners for enterprises. Some 18% of MENA enterprises claimed operators would be their first or second preferred supplier if they could purchase all digital transformation technologies/solutions from a single supplier – a strong starting point. The three strategies are not mutually exclusive. Moving up the ICT value chain (beyond connectivity) and playing a tech orchestration role are key to forging long-term relationships with other suppliers and enterprise customers.

Implications

Helping enterprises accelerate their digital transformation



Governments

- **Align national agendas with enterprise objectives.** The GCC is a benchmark for implementing national agendas for digital transformation (e.g. Qatar's Digital Agenda 2030, Saudi Vision 2030 and the UAE Centennial 2071). As tech progress accelerates (especially in AI) and enterprises advance their digital transformation, national agendas in the GCC and MENA should be updated with a regular cadence, factoring in the key objectives driving enterprise digital transformation.
- **Continue to develop a favourable policy and tech environment.** GCC and MENA enterprises spending 10% of their revenues on digital transformation brings enormous benefits to the economy, but this will only matter if policymakers continue to work with industry to address the challenges that enterprises face, while stimulating investments and returns in modern digital infrastructure, including through fit-for-purpose regulations.



Operators

- **Tailor B2B messaging and strategies.** B2B messaging should increasingly highlight how the use of technology can support enterprises' objectives while enhancing security (ideally pointing to successful examples of how early enterprise adopters of 5G, IoT and AI in the region are achieving tangible benefits). It is also important to educate enterprise customers on the benefits of digital transformation and tailor the B2B strategies and services to the specific needs of vertical sectors, as priorities, requirements and budgets differ.
- **Balance competition and collaboration.** B2B offers substantial growth opportunities but is a competitive market. Targeting the B2B opportunity by focusing heavily on competition may not be ideal. Much of the opportunity lies in partnering with other established vendors (e.g. network vendors, hyperscalers, tech companies) to deliver more comprehensive and integrated B2B solutions to enterprise customers in MENA.



Other vendors of digital transformation technologies and solutions

- **Be an enabler of ecosystems.** Beyond pursuing B2B growth opportunities in their core business, vendors (e.g. network vendors, hyperscalers, tech companies) should increasingly shift the focus from promoting the latest and greatest tech solutions to being enablers of ecosystems in the region, seeking support from operators. As networks and services become more sophisticated, the need for multi-party coalitions can only grow, requiring greater ecosystems.
- **Ensure AI is integrated into B2B.** GCC countries are investing heavily in AI (e.g. Saudi Arabia's National Strategy for Data & AI and the UAE's National Strategy for AI 2031), aiming for global leadership. AI will be the most explored tech by GCC and MENA enterprises in the next five years and the tech that captures the biggest spend. Suppliers of B2B services will need to have AI integrated into their B2B solutions and, equally importantly, their B2B messaging.

CONTENTS

1 Executive summary

2 Digital transformation of industries and countries

3 Technologies enabling digital transformation

4 Enterprise spend on digital transformation
and the B2B opportunity

5 Countries at a glance

6 Survey details

Digital transformation of industries in MENA

How vertical sectors compare across three key aspects

All are eager. Across three key aspects of digital transformation, all vertical sectors show an eagerness to accelerate their digital transformation. An indication of this is the difference in the overall score between the first and 10th sectors, at just 14%.

Deeper analysis reveals:

- Sectors where enterprises have more direct and frequent engagement with consumers (e.g. financial services and retail) lead on digital transformation, as consumer engagement shifts to digital.
- Sectors requiring device mobility (e.g. automotive and mobility; and transportation, logistics and warehousing) lead on the current use/future importance of using technologies enabling digital transformation, including 5G and AI.

Digital transformation of industries in MENA: ranking of vertical sectors

	Overall ranking	Ranking for digital transformation objectives	Ranking for current use/future importance of using technologies enabling digital transformation	Ranking for spend on digital transformation during 2025–2030 (as a percentage of revenues)
Financial services	1st	6th	5th	1st
Retail	2nd	5th	1st	4th
Manufacturing and industrial sectors	3rd	9th	7th	2nd
Automotive and mobility	4th	3rd	2nd	5th
Healthcare	5th	1st	4th	6th
Transportation, logistics and warehousing	6th	2nd	3rd	7th
Utilities and energy	7th	4th	8th	3rd
Public sector	8th	8th	6th	8th
Media and entertainment	9th	7th	9th	9th
Agriculture, forestry and fishing	10th	10th	10th	10th

See Methodology notes →

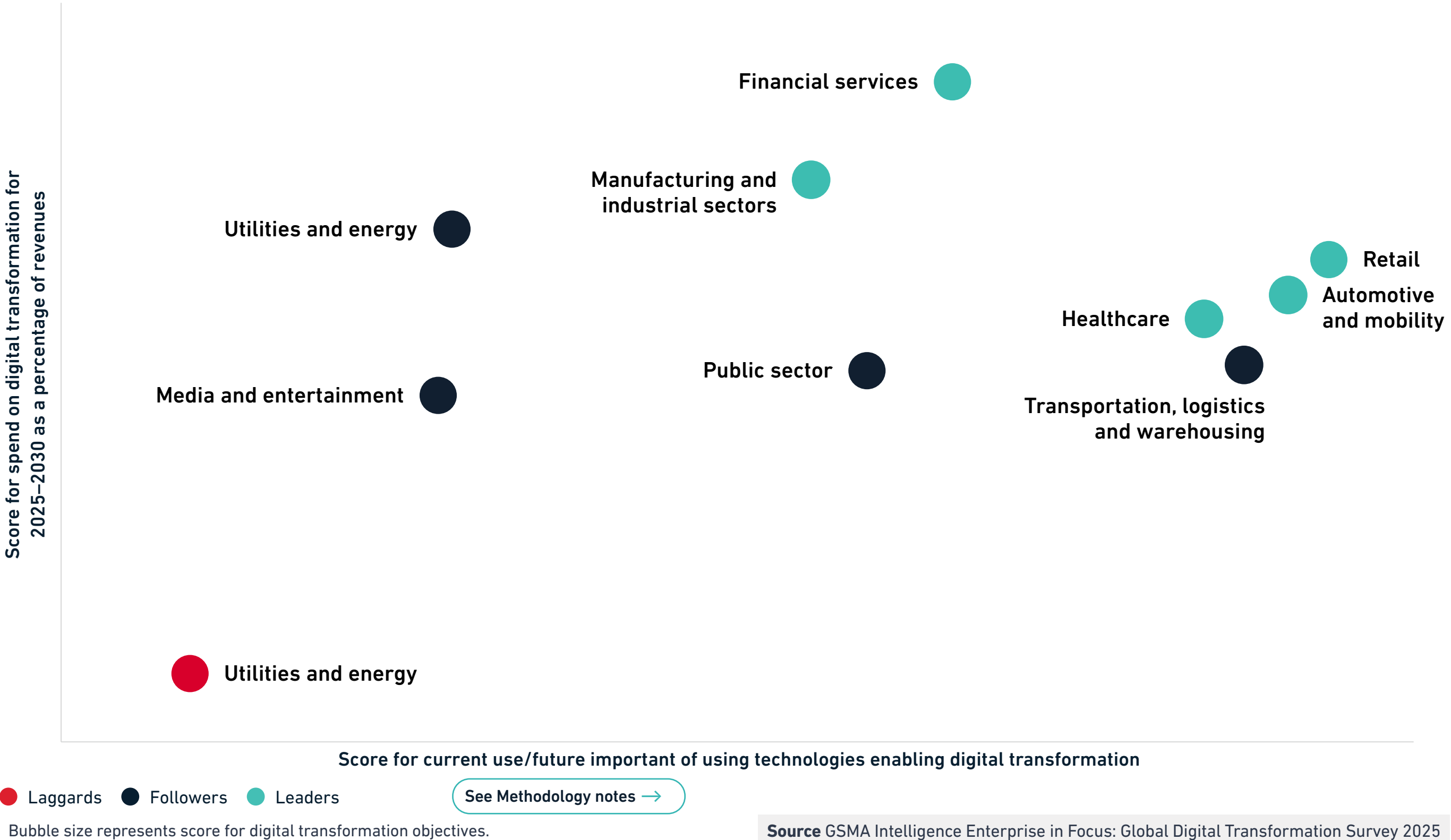
Source GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2025

Digital transformation of industries in MENA

Mapping the leaders, followers and laggards

Spending budgets vary. While all vertical sectors in MENA almost equally recognise the importance of digital transformation and the benefits of using technology, spend varies. Of the three aspects of digital transformation, spend for 2025–2030 as a percentage of revenues shows the greatest variance among vertical sectors. An indication of this is the difference in score between the first and 10th sectors, at 49%.

Digital transformation of industries in MENA: mapping vertical sectors

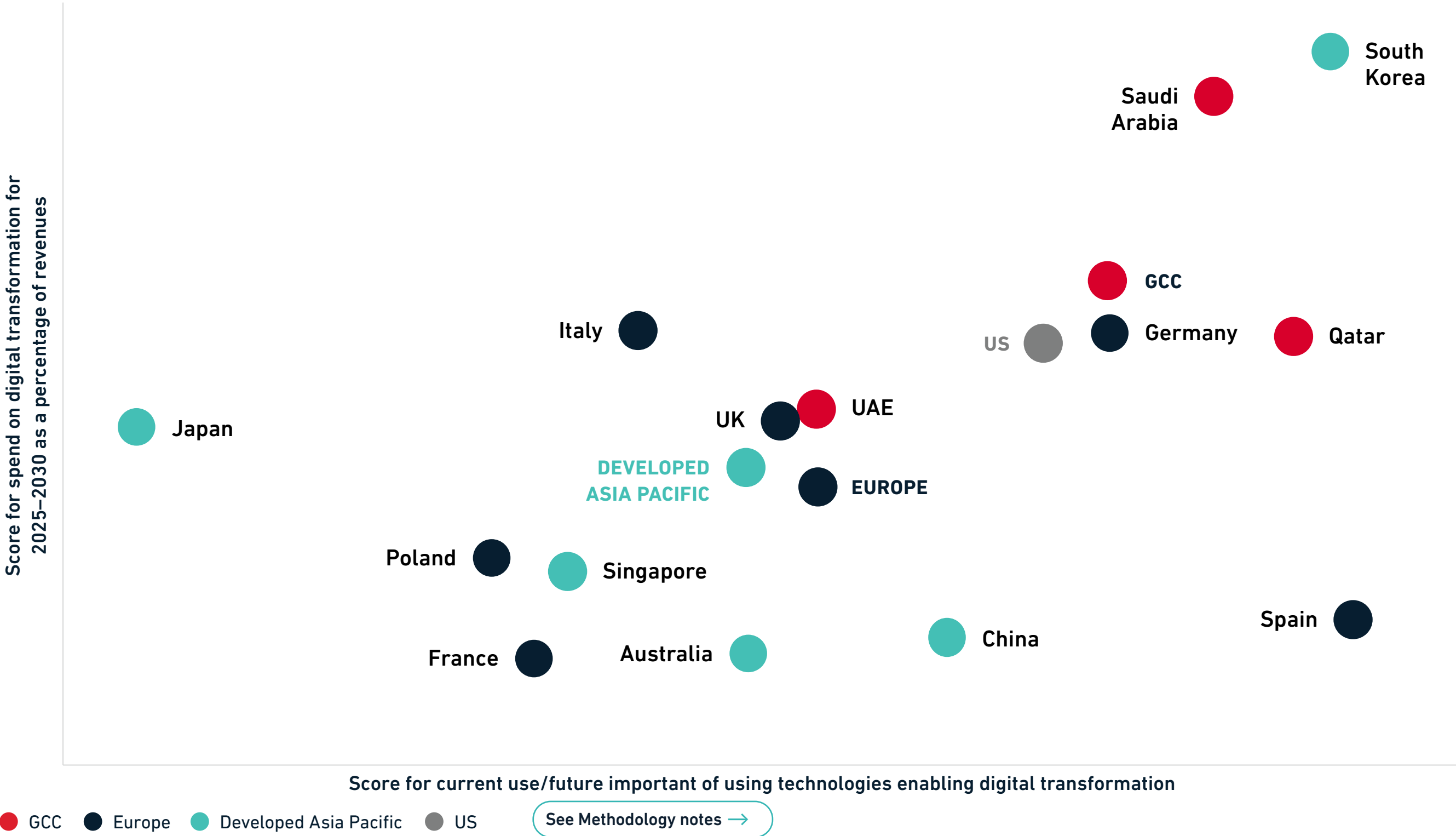


Comparing developed countries globally

GCC is a leading region on digital transformation of industries

GCC leads. Looking at the overall digital transformation scores of the 15 developed countries surveyed, the three GCC countries (Qatar, Saudi Arabia and the UAE) are positioned among the top countries. This confirms that the GCC plays an important role as a leading (and benchmark) region on digital transformation, offering a favourable environment for developing and scaling new technologies and innovations.

Digital transformation of industries worldwide: mapping developed countries*



Bubble size represents score for digital transformation objectives. *Developed countries: high-income countries (based on the World Bank's methodology) and China.

Comparing developed countries globally on spend on digital transformation

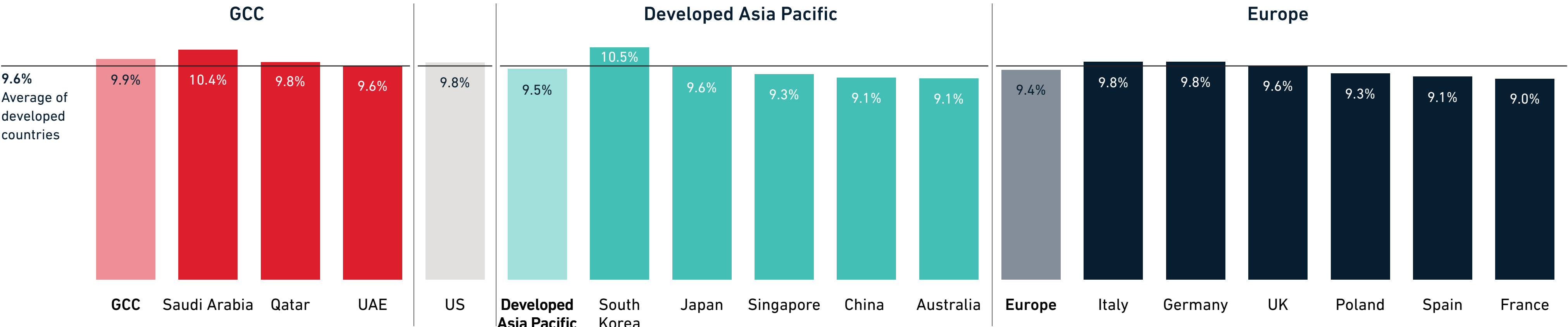
Two of the top five are from the GCC

GCC leads. On a like-for-like basis (enterprise spend on digital transformation during 2025–2030 as a percentage of enterprise revenues), two of the top five spending countries are from the GCC: Saudi Arabia (10.4%) and Qatar (9.8%), with the UAE following closely (9.6%).

The average across the 15 developed countries surveyed is 9.6%. At the regional level, the GCC leads (9.9%), followed by developed Asia Pacific (9.5%) and Europe (9.4%). Across all the developed countries, the pace of spend on digital transformation is set to intensify, meaning enterprise spend for 2028–2030 will be higher than the counterpart figure for 2025–2027, as companies will increasingly seek to scale the use of technology. In the GCC, 9.9% for 2025–2030 is the average of 9.1% for 2025–2027 and 10.7% for 2028–2030. Also, the bigger the enterprise, the higher the spend.

Enterprise spend on digital transformation during 2025–2030 as a percentage of revenues: developed countries*

Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Figures represent weighted average.



*Developed countries: high-income countries (based on the World Bank’s methodology) and China.

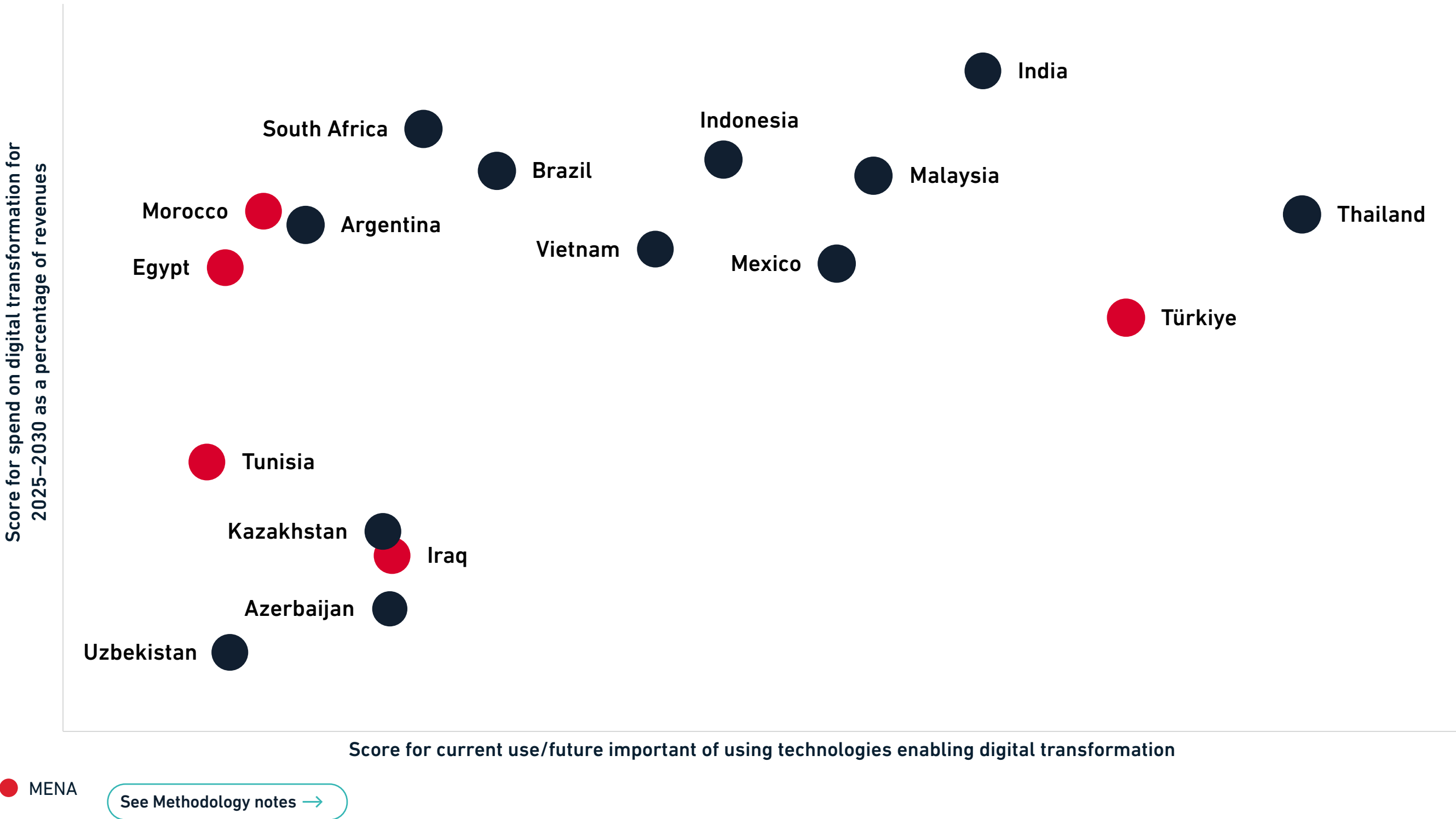
Comparing developing countries globally

Türkiye in the top five; Morocco in the top 10; other MENA countries lagging

Two MENA countries in the top 10. Looking at the overall digital transformation scores of the 17 developing countries surveyed, Türkiye is in the top five, while Morocco is in the top 10.

Türkiye leads. Türkiye has the second-highest score on current use/future importance of using technologies. Turkish enterprises show a very high eagerness to leverage technologies to accelerate digital transformation, and will spend 10% of their revenues on digital transformation to 2030.

Digital transformation of industries worldwide: mapping developing countries*



Bubble size represents score for digital transformation objectives. *Developing countries: upper-middle and lower-middle income countries (based on the World Bank’s methodology).

Source GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2025

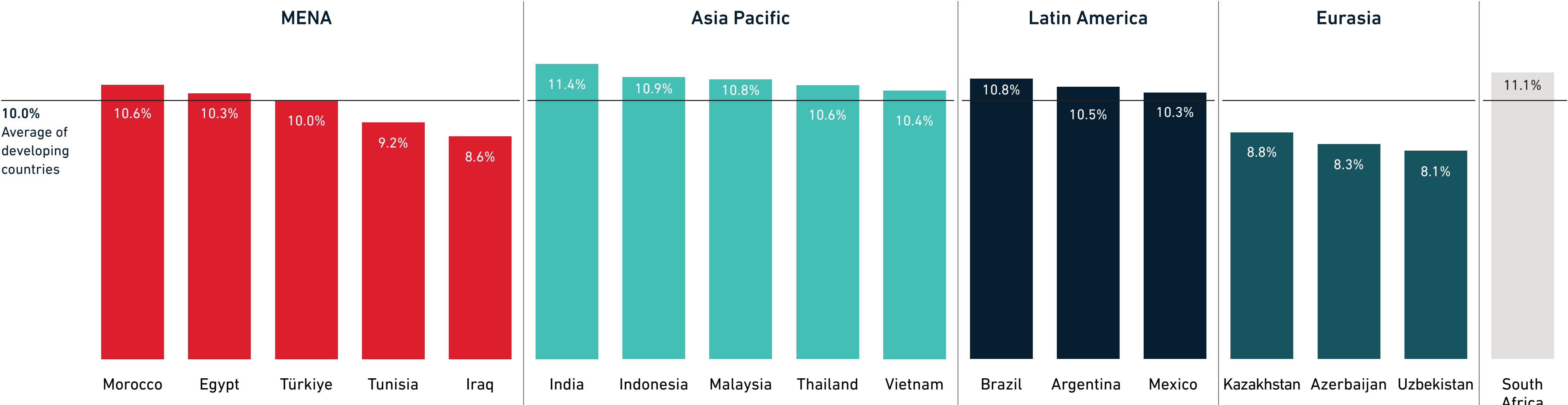
Comparing developing countries globally on spend on digital transformation:
A mixed picture in MENA

Regional and country variations. On a like-for-like basis (enterprise spend on digital transformation for 2025–2030 as a percentage of enterprise revenues), the average spend of MENA developing countries (9.7%) is closely aligned to the global average of developing countries (10.0%).

MENA shows a mixed picture on spend; Morocco has the highest score (10.6%) and ranks sixth globally. The gap between Morocco and Iraq is 2 pp. Across all the developing countries, the pace of spend on digital transformation is set to intensify, meaning enterprise spend for 2028–2030 will be higher than the counterpart figure for 2025–2027.

Enterprise spend on digital transformation during 2025–2030 as a percentage of revenues: developing countries*

Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Figures represent weighted average.



* Developing countries: upper-middle and lower-middle income countries (based on the World Bank’s methodology).

CONTENTS

- 1 Executive summary
- 2 Digital transformation of industries and countries
- 3 Technologies enabling digital transformation
- 4 Enterprise spend on digital transformation and the B2B opportunity
- 5 Countries at a glance
- 6 Survey details

Digital transformation objectives

Revenue growth beats cost savings, but security is on top in most MENA countries

B2B messaging and national agendas need to align with enterprise objectives. There is a consensus among enterprises from the GCC and wider MENA region that digital transformation brings multiple benefits, with enhanced security the top objective in five of the eight countries surveyed.

Revenue-related objectives are deemed slightly more important than cost-related objectives. For suppliers of digital transformation technologies (including operators), B2B messaging should highlight how the use of technology can support enterprises’ objectives (ideally pointing to successful examples) while enhancing security. For governments, national agendas for digital transformation should factor in the top enterprise objectives in the country. However, they also need to be as comprehensive as possible, to allow all enterprises and vertical sectors to reap the benefits.

Digital transformation objectives: ranking

How important are the following objectives to your company’s digital transformation initiatives? Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Ranking based on percentages of enterprises rating the objective as ‘extremely important’.

		MENA (8 countries)	GCC (3 countries)	Qatar	Saudi Arabia	UAE	Egypt	Iraq	Morocco	Tunisia	Türkiye	Global (32 countries)
Revenue-related	Enhance security and protect against cybersecurity threats	1st	2nd	6th	1st	1st	1st	1st	1st	2nd	2nd	1st
	Increase our revenues	2nd	1st	2nd	2nd	2nd	3rd	5th	4th	6th	3rd	3rd
	Strengthen our competitive position in our markets and/or businesses	3rd	3rd	3rd	5th	3rd	2nd	3rd	5th	7th	1st	4th
	Enhance our customer experience	4th	4th	4th	4th	4th	6th	2nd	2nd	4th	4th	2nd
Cost-related	Improve the agility of our business operations	5th	6th	1st	7th	6th	5th	6th	3rd	5th	7th	5th
	Reduce our costs (opex and capex) and become more cost efficient	6th	7th	5th	8th	7th	8th	4th	7th	1st	5th	7th
	Support progress of our sustainability targets	7th	8th	7th	6th	8th	4th	8th	6th	3rd	6th	8th
	Meet compliance or regulatory requirements	8th	5th	8th	3rd	5th	7th	7th	8th	8th	8th	6th

Connectivity and networks

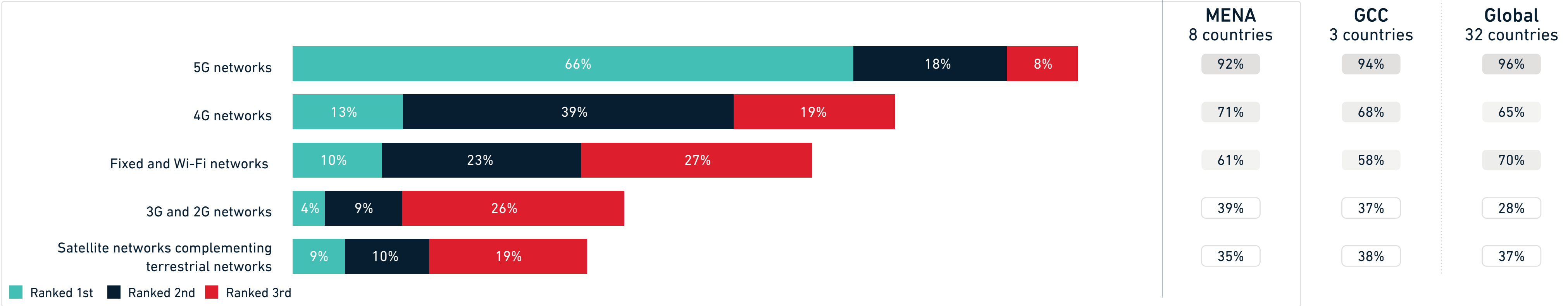
Enterprises consider 5G, 4G and fixed as the most important networks for digital transformation

Mobile is central to digital transformation. While this holds true globally, two survey findings highlight that enterprises from the GCC and wider MENA region rely more heavily on mobile tech to advance their digital transformation.

First, on the relative importance of fixed networks, MENA and the GCC show lower scores than the global average, likely reflecting less extensive availability of fixed networks in some of the MENA countries. Second, legacy mobile networks (2G and 3G) are deemed more important in MENA than on average globally, with Iraq and Tunisia leading. Meanwhile, satellite is making inroads, with Morocco and Saudi Arabia leading on expectations that satellite networks complementing terrestrial networks will be fairly important for digital transformation. There is no single network technology that can fully meet the diversity of enterprise requirements altogether and at an optimal cost; instead, enterprises will continue to use multiple networks to balance requirements (especially for IoT) and costs.

Connectivity and networks: importance to the success of digital transformation

As part of your company's digital transformation, rank the following connectivity networks based on how important their use is to the success of your company's digital transformation during 2025–2027. Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.



5G connectivity and networks

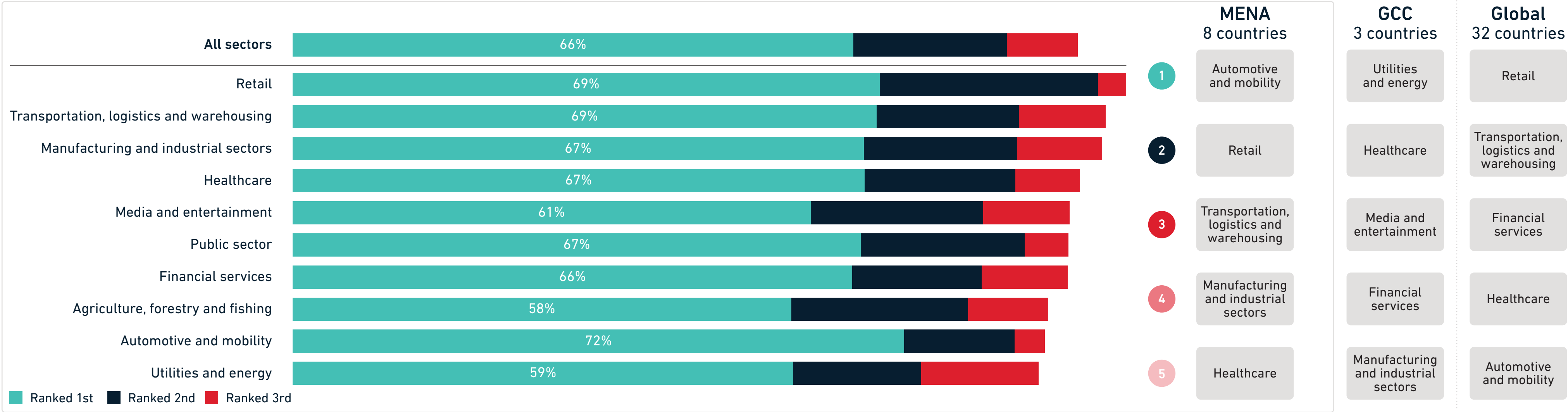
Sectors requiring device mobility lead on importance of 5G to digital transformation

5G important in all countries and sectors, but with variation.
In the GCC, the utilities and energy sector has the highest score for importance of 5G to digital transformation, with Qatar leading.

This speaks to a regional trend of using networks and AI technologies as well as renewables to modernise energy grids (smart grids, digital twins, smart meters). Retail ranks high across MENA, reflecting expectations that 5G can help enhance in-store and online customer experiences, which is the top objective for retail enterprises in the region. Sectors requiring device mobility (e.g. automotive and mobility, and transportation, logistics and warehousing) generally show greater 5G importance across both MENA and globally.

5G connectivity and networks: importance to the success of digital transformation

Base is enterprises undertaking digital transformation. Percentage of respondents.



Source GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2025

5G benefits

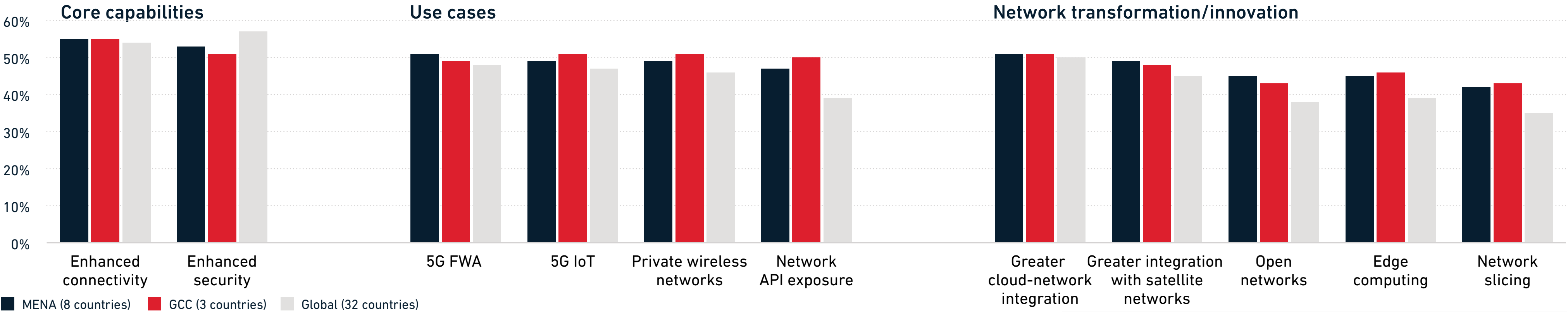
Core capabilities of enhanced connectivity and security lead; GCC leads on use cases and new tech

5G benefits span core and beyond. Enhanced connectivity and security topped the list of 5G capabilities that enterprises across MENA and the GCC (and globally) deem as extremely important to the success of digital transformation.

This comes as no surprise; both are core 5G capabilities. Beyond core capabilities, 5G’s ability to support/enhance use cases such as FWA, IoT, private networks and network APIs is also seen as important, confirming these as relevant areas of 5G monetisation for operators. On use cases and new network technologies such as edge and slicing, GCC enterprises lead on expectations of impact; this reflects recent progress made by operators and vendors in the GCC in driving the deployment of 5G standalone networks and associated capabilities. Of the seven operators that have launched 5G-Advanced networks worldwide (as of September 2025), two are from the GCC. In addition, 11 operators from the six GCC countries have announced plans to launch 5G-Advanced, bringing the total to 13 operators and confirming GCC’s ambitions to lead on 5G-Advanced.

Importance of 5G capabilities or technologies to the success of digital transformation

How important are the following 5G capabilities or technologies to the success of your company’s digital transformation? Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation that ranked 5G connectivity and networks as important to the success of digital transformation. Percentage of respondents rating the capability/technology as ‘extremely important’.



Source GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2025

5G use cases

Qatar leads on importance of private networks; FWA less relevant in the GCC due to extensive fibre presence

Business opportunities associated with 5G use cases are not ‘one size fits all’.

- **5G FWA.** For enterprise digital transformation, 5G FWA’s importance is slightly lower in the GCC (compared to other MENA countries), as the three GCC countries surveyed have extensive fibre coverage (especially Qatar and the UAE). Nevertheless, a reasonable share of enterprises in the GCC, especially SMEs, will increasingly explore the viability of 5G FWA as a replacement for legacy copper-based networks or as a fibre back-up.
- **Private wireless networks.** Qatari enterprises have the highest expectations for the importance of private networks for digital transformation, reflecting the momentum seen in the last couple of years in terms of deployments. The Communications Regulatory Authority has also adopted policies to support private 5G networks.
- **5G IoT.** There is a consensus across MENA that 5G helps enhance IoT deployments to drive scale, with GCC countries more bullish on expectation of 5G importance for IoT. The top three vertical sectors showing the highest expectations on 5G IoT are automotive and mobility, utilities and energy, and transportation, logistics and warehousing. Operators and other providers of IoT technology should ensure these three sectors are included in their business target list.

5G use cases: ranking by country and vertical sector

Base is enterprises undertaking digital transformation that ranked 5G connectivity and networks as important to the success of digital transformation. Ranking based on the percentage of respondents rating the use case as ‘extremely important’.

	5G FWA	5G IoT	Private wireless networks	Network API exposure
Qatar	5th	6th	1st	3rd
Saudi Arabia	4th	2nd	5th	4th
UAE	8th	3rd	6th	5th
Egypt	3rd	5th	2nd	2nd
Iraq	7th	7th	8th	8th
Morocco	1st	1st	3rd	6th
Tunisia	6th	8th	7th	7th
Türkiye	2nd	4th	4th	1st

Top three vertical sectors:

	5G FWA	5G IoT	Private wireless networks	Network API exposure
1	Transportation, logistics and warehousing	Automotive and mobility	Financial services	Utilities and energy
2	Utilities and energy	Utilities and energy	Healthcare	Retail
3	Healthcare	Transportation, logistics and warehousing	Automotive and mobility	Automotive and mobility

6G expectations

Lack of consensus among enterprises on what to expect means unclear potential

Too early for 6G. There is no consensus among enterprises across the GCC, wider MENA or globally on how 6G’s potential benefits and use cases can help digital transformation. In MENA, the scores of the top four benefits were close, suggesting no clear winner. Lack of consensus is no surprise given that 6G is still years away from early commercialisation in many of the countries surveyed, and many enterprises have yet to fully leverage (or even implement) 5G. In terms of 6G benefits, improvements in integrated sensing

and communication, and positioning and timing capabilities topped the list in MENA (showing alignment with what major network vendors are advocating), whereas improvements in network performance ranked third (suggesting some enterprises may not be happy with what 5G is delivering). In terms of use cases, 6G’s ability to enhance AI capabilities (including robotics, automation and autonomous mobility and transportation) leads in MENA.

Importance of 6G upgrades: ranking

Connectivity technology has evolved in the last three decades from 2G to 3G, 4G and now 5G. If a new network technology called 6G were to be available in the future, which of the following upgrades would be most useful for your company’s digital transformation? Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

	MENA (8 countries)	Global (32 countries)
Improvement in integrated sensing and communication	1st	1st
Improvement in positioning and timing capabilities	2nd	3rd
Improvement in network performance	3rd	2nd
Deeper integration of cellular and satellite networks	4th	4th
Deeper integration of cellular and AI technologies	5th	6th
Improvement in strengthening security	6th	5th
Improvement in network energy efficiency that leads to energy savings for your company	7th	7th
Greater ability to leverage the network to develop and access network APIs	8th	8th

Importance of potential 6G use cases: ranking

Which of the following potential 6G use cases would be appealing to your company’s digital transformation? Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

	MENA (8 countries)	Global (32 countries)
Advanced AI services	1st	1st
Advanced robotics and automation	2nd	3rd
Immersive AR/VR and real-time live services	3rd	7th
Autonomous mobility and transportation	4th	4th
Enhanced communications services	5th	2nd
Satellite/cellular integrated services	6th	6th
M2M/IoT communications	7th	5th
Critical communications and services	8th	8th

6G use cases

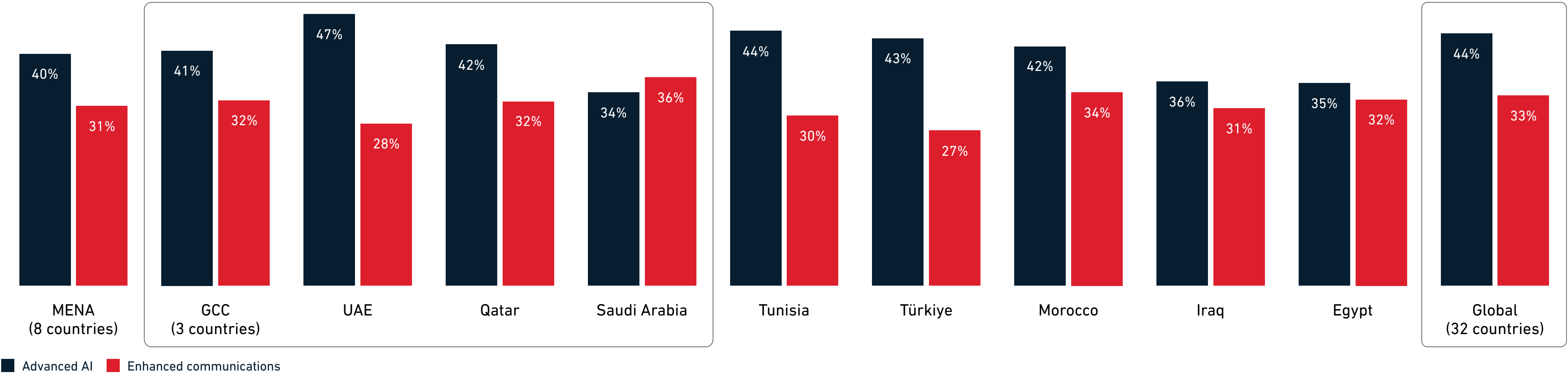
Advanced AI wins over enhanced communications in the GCC and most MENA countries

AI above communications. Across the GCC, wider MENA and globally, the prospect of 6G being able to enhance AI capabilities (advanced AI services, advanced robotics and automation, and autonomous mobility and transportation) is rated more appealing by enterprises than 6G being able to enhance communications (enhanced communications services, critical

communications and services, and M2M/IoT communications). Saudi Arabia is the one exception in MENA, due to M2M/IoT being the most appealing 6G use case in the country. For operators willing to be 6G pioneers, 6G use cases related to enterprise AI should always be included in early 6G B2B messaging and business plans.

6G’s appeal for delivering advanced AI and enhanced communications

Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents rating advanced AI and enhanced communications as the most appealing (i.e. ranked first) 6G use case. Advanced AI includes advanced AI services, advanced robotics and automation, and autonomous mobility and transportation. Enhanced communications includes enhanced communications services, critical communications and services, and M2M/IoT communications.



Enabling tech beyond networks

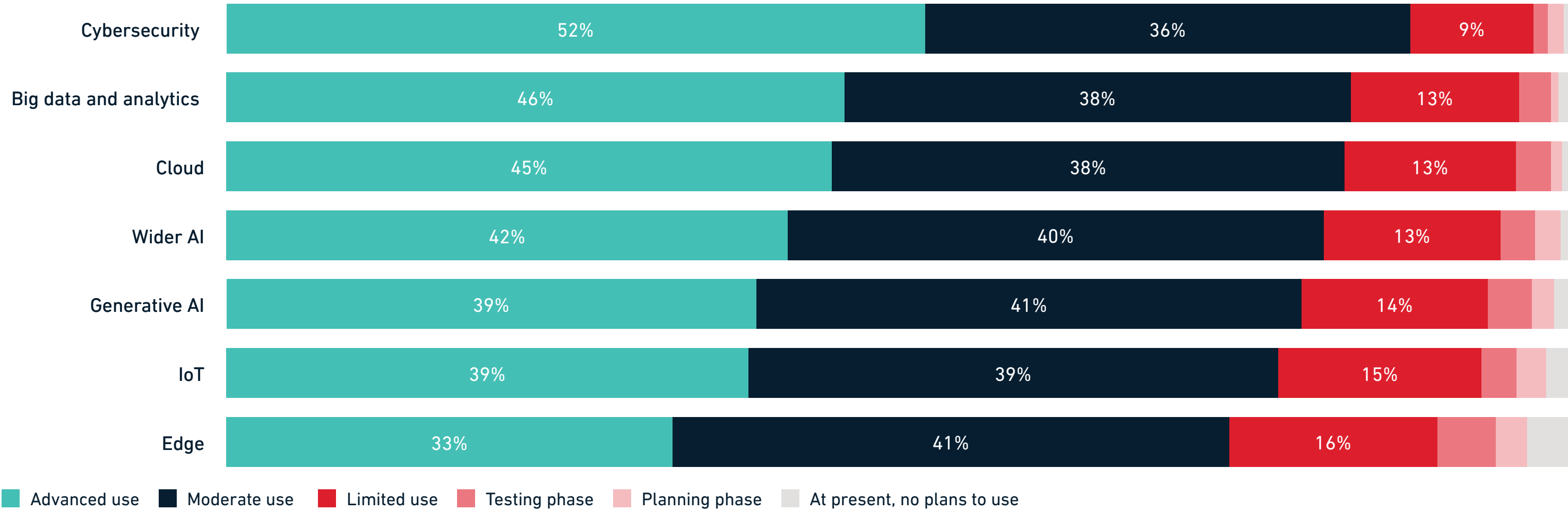
Cybersecurity and cloud are essential; AI and IoT on the rise; GCC a leading region

Scaling up. Cybersecurity and cloud are the most used technologies enabling digital transformation across the GCC and wider MENA region (unsurprisingly, being core technologies alongside connectivity). The use of AI is growing across MENA, but there is a gap versus more established technologies in terms of share of enterprises making advanced use. This comes as no surprise given that AI is a new technology. For all technologies, moving from

moderate to advanced use will be key in the next five years. The GCC shows more advanced use of technologies than the rest of MENA. The UAE leads on advanced use for four of the seven technologies (cybersecurity, cloud, generative AI and edge). Qatar leads on the use of wider AI technology and big data and analytics. Saudi Arabia leads on IoT.

Technologies (beyond connectivity and networks) enabling digital transformation: state of use

Digital transformation involves the use of various technologies beyond connectivity and networks. As part of your company’s digital transformation, where are you in the process of using the following technologies? Aggregate figures across the eight MENA countries and 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.



GCC countries

Who leads on advanced use

Qatar	Saudi Arabia	UAE
49%	56%	61%
46%	42%	42%
45%	44%	46%
47%	39%	40%
43%	33%	44%
40%	46%	35%
31%	30%	37%

Use of AI

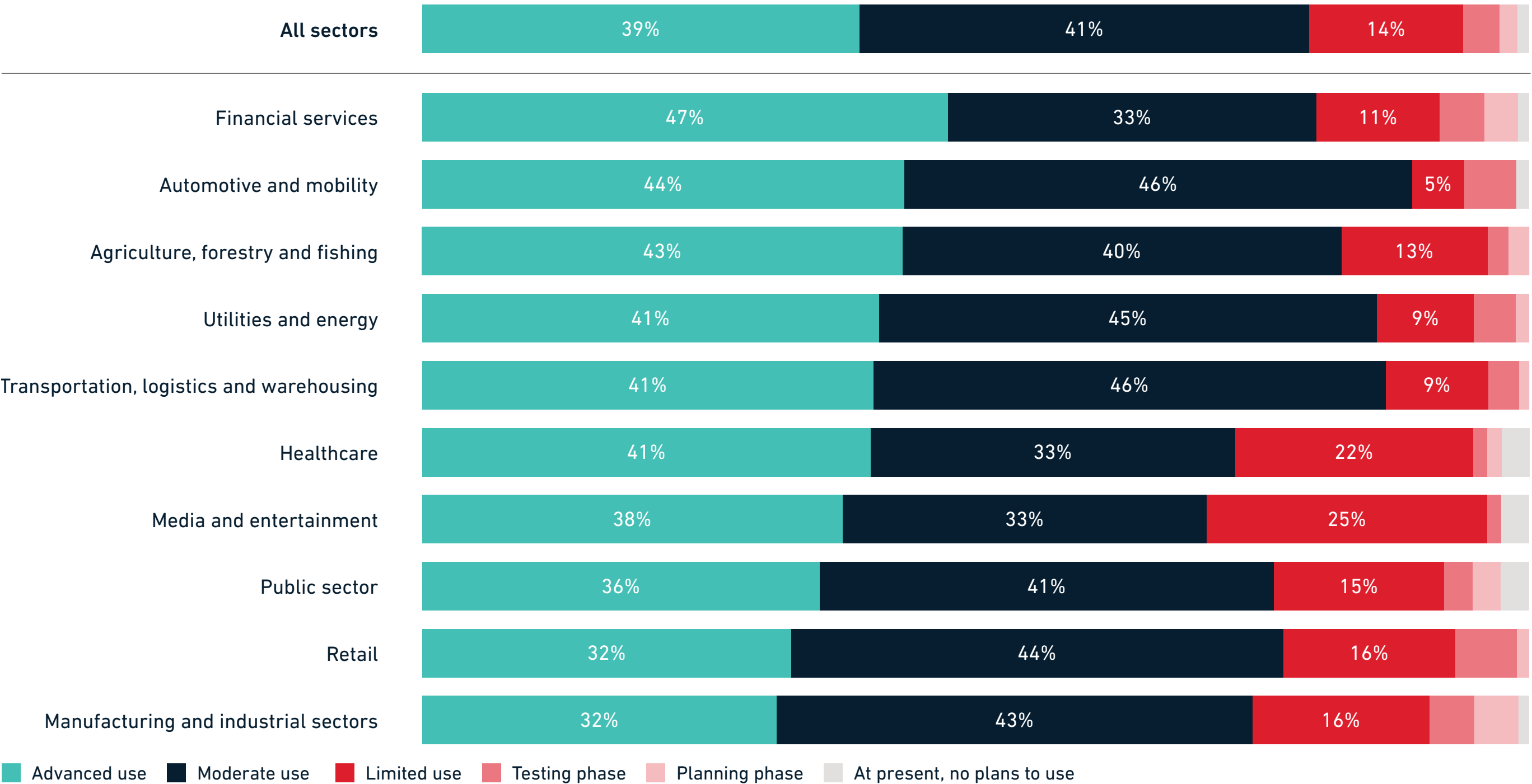
On the rise, but only 39% of enterprises are making advanced use of genAI, leaving room for growth

On the rise, everywhere. GenAI has quickly advanced from a nascent tech to being widely used across most sectors in the last two years. Across MENA, most enterprises undertaking digital transformation already use genAI tech, but only 39% are currently making advanced use of it. The biggest gaps are in the retail and manufacturing & industrial sectors, but we expect both sectors to catch up given the enormous potential of using AI for productivity and efficiency gains.

GCC leads. Globally, Qatar and the UAE are among the leading countries for local enterprises making advanced use of genAI technology, with the financial services sector leading. The bigger the enterprise, the level of advanced use of genAI (a function of greater budgets for AI projects).

GenAI technology: state of use by vertical sector

Digital transformation involves the use of various technologies beyond connectivity and networks. As part of your company's digital transformation, where are you in the process of using genAI technology? Aggregate figures across the eight MENA countries surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.



AI impact

Impact expected to be big across several areas; security and productivity/efficiency lead

AI increasingly central to digital transformation. This is confirmed by enterprises’ expectations that AI’s impact will be big across several areas – a finding seen across all regions and vertical sectors globally.

Variation in top area. Globally, using AI to enhance security systems and protect against cybersecurity threats is the area expected to see the biggest impact. However, the GCC has a different top area of impact: using AI to reduce costs or become more cost efficient in business operations. Across MENA, productivity and efficiency gains are seen as the top area of AI impact.

All matter. In general, most AI areas of impact show similar scores, suggesting AI will be used by enterprises to achieve multiple benefits – confirmation of its transformative impact.

AI business impact: ranking of areas based on enterprise expectations of a big impact

Rate the following potential uses of AI technology (genAI and/or wider AI) in terms of how they might impact your business. Aggregate figures across the eight MENA countries and 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation that are already using or testing/planning to use genAI and/or wider AI technology.

Categories of AI use: Productivity and efficiency gains Security Business development and commercial/marketing decisions		MENA (8 countries)	GCC (3 countries)	Global (32 countries)
Using AI to better manage the technologies that we use or sell (e.g. networks, devices, platforms, solutions)		1st	2nd	4th
Using AI to enhance worker productivity		2nd	6th	3rd
Using AI to enhance our security systems and protect against cybersecurity threats		3rd	8th	1st
Using AI to launch new services, products or capabilities, creating new revenue streams		4th	3rd	5th
Using AI to better review our business opportunities and mitigate our business risks, and for executive leadership decision-making process		5th	11th	7th
Using AI to reduce costs or become more cost efficient in business operations and processes		6th	1st	2nd
Using AI to innovate our existing portfolio of services, products and capabilities		7th	7th	8th
Using AI to enhance our marketing decisions and campaigns		8th	4th	10th
Using AI to improve the monetisation of data assets		9th	12th	11th
Using AI for the automation of customer-facing activities		10th	5th	6th
Using AI to inform and enhance our commercial pricing decisions		11th	9th	12th
Using AI to enhance our sales and commercial decisions		12th	10th	9th

Awareness of network APIs

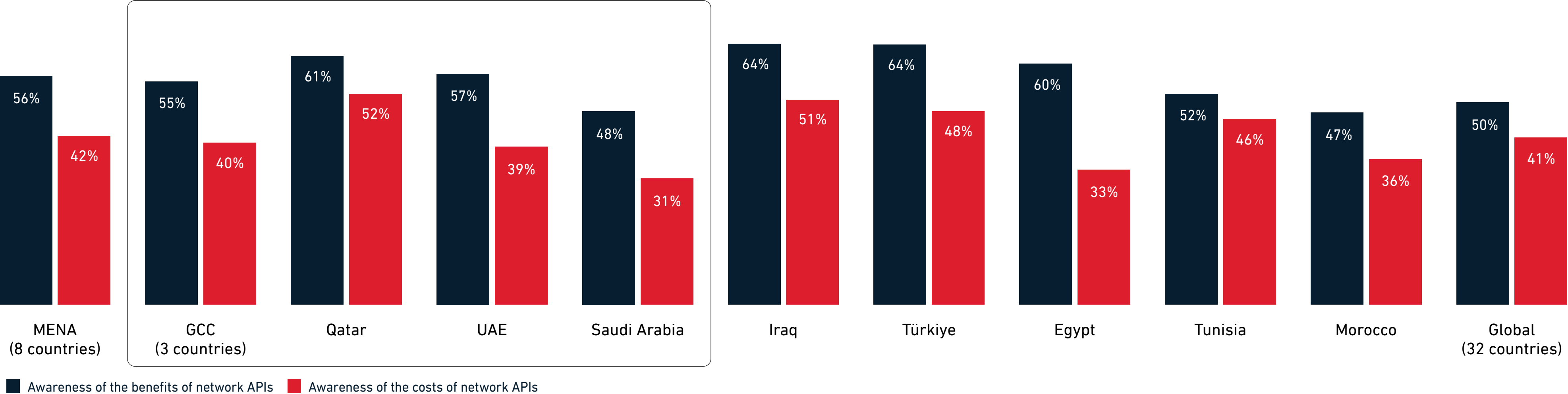
Broad awareness among GCC and MENA enterprises, especially on benefits

Time to capitalise on awareness. There is broad awareness of network APIs across the GCC and wider MENA region, with eight out of 10 enterprises having heard about network APIs (the global score is similar). This represents an important factor to build on when targeting enterprise demand. However, deeper analysis shows a gap between awareness of the benefits and costs of network APIs, with the first being 15 pp higher across

the region. In the GCC, Qatar shows the highest awareness of both benefits and costs. Looking at vertical sectors across MENA, automotive and mobility shows the highest awareness of benefits, whereas transportation, logistics and warehousing shows the biggest gap between awareness of benefits and costs (31 pp). The bigger the gap, the higher the barrier to driving adoption of network APIs at scale.

Awareness of the benefits and costs of network APIs

How would you describe your level of awareness of the benefits and costs of network APIs? Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises that are aware of network APIs. Percentage of respondents selecting 'extremely aware'.



Network API use cases

Network performance/quality optimisation and fraud prevention are the most appealing

Network API use cases ranked by importance

A range of network APIs are currently available for deployment and commercialisation, serving different purposes. How important are the following network API-enabled purposes to your company’s digital transformation? Aggregate figures across the eight MENA countries surveyed. Base is enterprises that are aware (extremely aware or quite aware) of the benefits of network APIs. Ranking based on the percentage of respondents rating the use case as ‘extremely important’.

Importance of network API use cases, ranked from top to bottom	Manufacturing and industrial sectors	Transportation, logistics and warehousing	Automotive and mobility	Utilities and energy	Financial services	Healthcare	Retail	Media and entertainment	Agriculture, forestry and fishing	Public sector
APIs for network performance/quality optimisation for services/applications	1st	1st	1st	5th	2nd	4th	3rd	1st	1st	4th
APIs for fraud prevention using customer identity capabilities	2nd	5th	2nd	4th	6th	3rd	1st	2nd	5th	5th
APIs for checking device information (e.g. type of device, whether the device is roaming, and more)	5th	2nd	3rd	2nd	1st	7th	7th	4th	2nd	6th
APIs for checking device location such as geotargeted retail marketing	6th	4th	7th	1st	4th	1st	6th	3rd	6th	3rd
APIs for online purchases of products/services, online payments and associated billing	3rd	3rd	6th	7th	7th	5th	4th	6th	7th	1st
APIs for remote control and monitoring of machines, vehicles and other IoT devices	4th	7th	4th	3rd	3rd	2nd	2nd	7th	3rd	7th
APIs for delivery of services/products/content and control of the delivery of digital/physical services	7th	6th	5th	6th	5th	6th	5th	5th	4th	2nd

Digital transformation deployment challenges

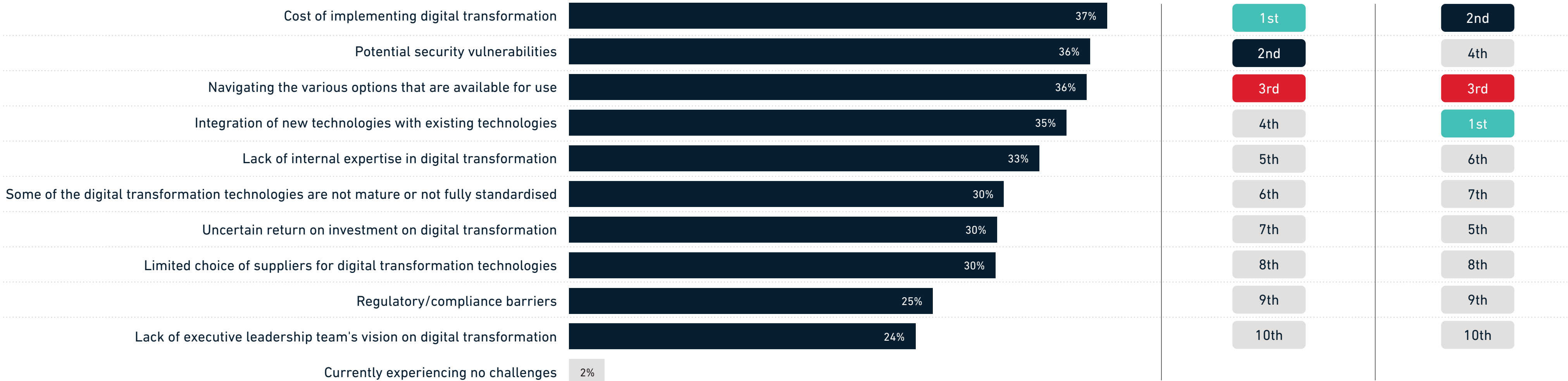
Many exist and are equally important; supplier/partner support is needed

Tech integration more important than ever. The survey results show two things. First, in MENA, the top four deployment challenges have similar scores, highlighting that challenges are not ‘one size fits all’. Second, enterprises in the GCC ranked complexity of tech integration as their top challenge, whereas cost of implementation was top in the wider MENA region. As cost of implementation and complexity of tech integration (highly

interrelated) are key deployment challenges, the role of the tech orchestrator will become more important, providing new opportunities for suppliers of digital transformation technologies, including operators. Moving up the ICT value chain (beyond connectivity) and playing a tech orchestration role bring higher value to operators and the possibility to forge long-term relationships with other suppliers and enterprise customers.

Digital transformation deployment challenges

What are the challenges that your company currently faces when implementing digital transformation initiatives? Aggregate figures across the eight MENA countries and 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents. Respondents could select all that apply.



CONTENTS

- 1 Executive summary
- 2 Digital transformation of industries and countries
- 3 Technologies enabling digital transformation
- 4 Enterprise spend on digital transformation and the B2B opportunity
- 5 Countries at a glance
- 6 Survey details

Spend on digital transformation

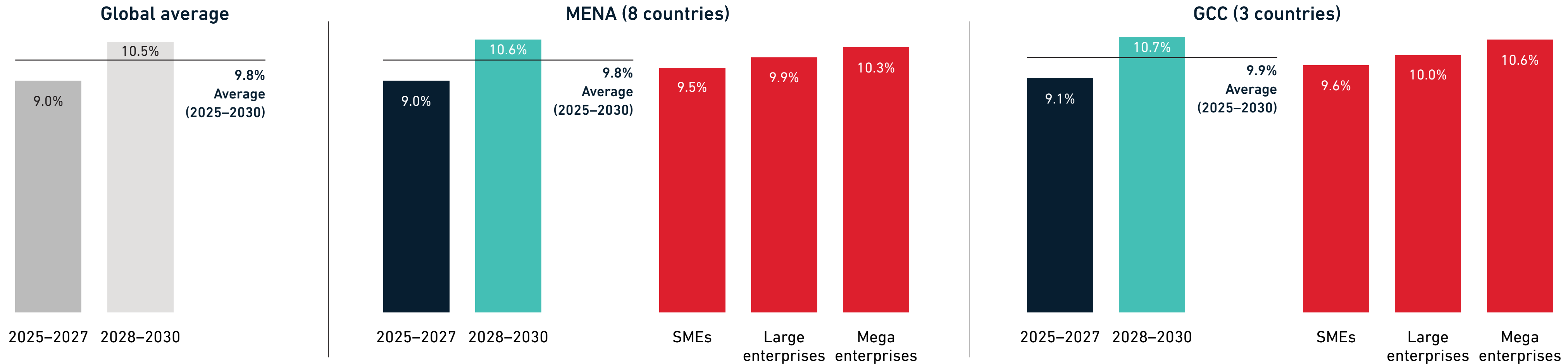
10% of revenues through to 2030; the bigger the enterprise, the higher the spend

MENA on a par with global; GCC leads. In MENA, on average across the 10 vertical sectors surveyed, enterprise spend on digital transformation will account for 9.0% of enterprise revenues for 2025–2027, growing to 10.6% for 2028–2030. The average for 2025–2030 will be 9.8%.

As expected, mega enterprises (those with 10,000 or more employees) will spend more on digital transformation than SMEs (20–249 employees). This likely reflects the implementation of bigger, in some cases multi-country, digital transformation projects. Large enterprises (250–9,999 employees) are in between. However, variation in spend as a percentage of revenues for the three categories of enterprise size is not as big as might be expected, as SMEs are eager to catch up on digital transformation, addressing some of their existing gaps. Spend on digital transformation for 2025–2030 in MENA (9.8% of revenues) is aligned with the global trend (9.8%). The GCC (9.9%) leads on enterprise spend.

Enterprise spend on digital transformation as a percentage of revenues

Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Figures represent weighted average.



Spend on digital transformation by vertical sector

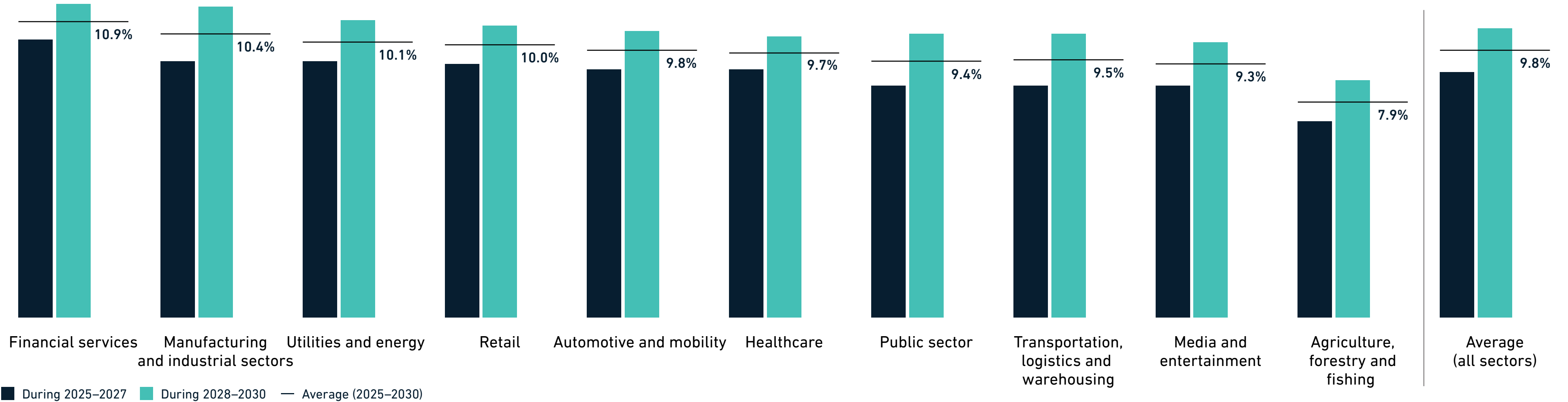
On the rise everywhere, with financial services leading

Sectors have different budgets. Deeper analysis of the survey data for MENA reveals two important findings. First, enterprise spend on digital transformation as a percentage of revenues will be in double digits for most sectors over the long term (agriculture, forestry and fishing is an exception). This confirms that MENA enterprises across all vertical sectors are

increasingly eager to capture the benefits of digital transformation, making the necessary investments. Second, there are sector variations, with a 3-pp gap between the top (financial services) and bottom (agriculture, forestry and fishing) sectors. This confirms that vertical sectors are at different stages of digital transformation and that some sectors may face budget limitations.

Spend on digital transformation as a percentage of revenues: by vertical sector

Aggregate figures across the eight MENA countries surveyed. Base is enterprises undertaking digital transformation. Figures represent weighted average.



Spend by technology

AI and connectivity will be the leading areas of spend on digital transformation for 2025–2030

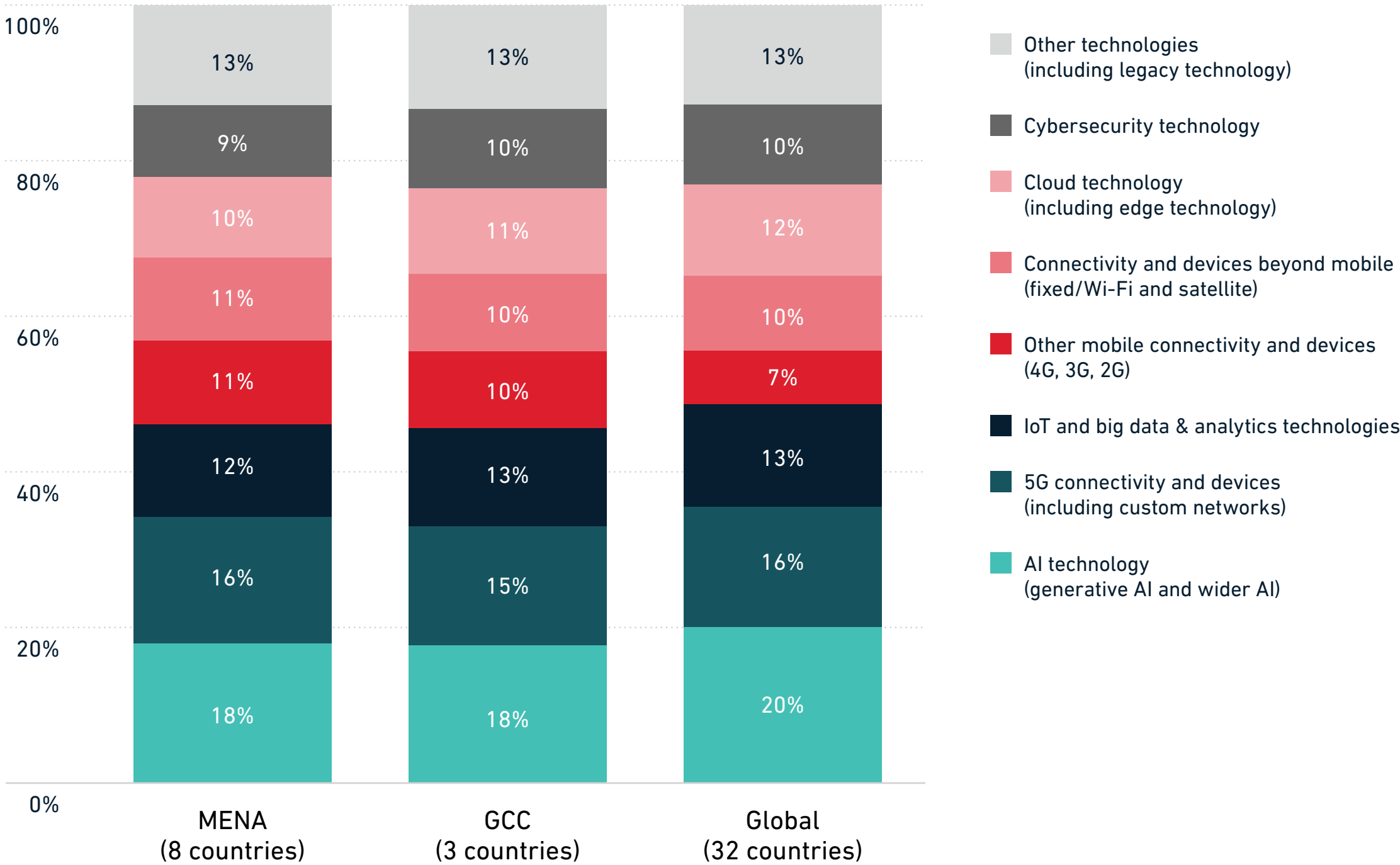
Mobile connectivity leads. In MENA, mobile connectivity and associated devices will account for 27% of total enterprise spend on digital transformation for 2025–2030 (25% in the GCC; 23% globally). Overall, the breakdown of spend by tech does not show significant variation; the biggest difference between GCC/MENA and globally is on enterprise spend on previous generation mobile tech (4G, 3G, 2G) which is higher in the GCC/MENA, reflecting ongoing investments in various MENA countries, especially those where 5G is still in its early phases of rollout and adoption.

AI on the rise. AI will be the technology beyond connectivity that captures the biggest spend during 2025–2030 (18% both in the GCC and wider MENA). This is unsurprising, given the consensus among enterprises that AI will have a significant impact across several business areas.

Comparisons may not be like for like. For example, connectivity, cloud and cybersecurity typically involve recurring spend (e.g. monthly subscriptions), whereas other technologies may have different and less recurring forms of spend. There could be spend overlap between technologies, especially where enterprises work with generalist suppliers across a range of technologies that could be billed as an integrated digital transformation package.

Spend on digital transformation by technology as a percentage of total spend on digital transformation (2025–2030)

Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Figures represent weighted average.



Timelines for the RoI from digital transformation spend

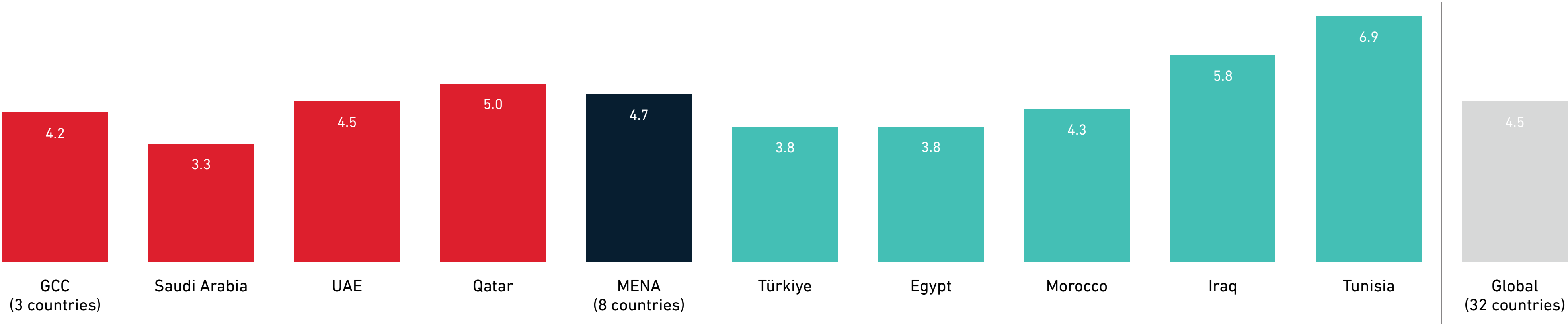
Nearly 5 years in MENA; 4 years in the GCC; 4.5 years globally

RoI takes time. For enterprises across the GCC and wider MENA region, spending 10% of revenues on digital transformation during 2025–2030 is a major investment. When asked about their expected timelines for RoI on digital transformation spend, MENA enterprises claim an average of 4.7 years. GCC enterprises are more optimistic, at 4.2 years, with Saudi Arabia at 3.3 years. The global average is 4.5 years.

Looking at the vertical sectors in MENA, the automotive and mobility sector shows the most optimistic expectation (4.0 years), whereas the agriculture, forestry and fishing sector shows the longest timeline (almost 6 years). The average RoI expected by MENA enterprises is two-fold (i.e. a return two times higher than spend). To achieve the expected RoI, a policy and tech environment that stimulates investments in modern infrastructure (e.g. cloud, cybersecurity, next-generation connectivity, IoT and AI) is needed. Fit-for-purpose regulation is also key, as more than 60% of enterprises in MENA (growing to thirds in the GCC) believe regulatory challenges are impacting product/service commercialisation.

Timelines for RoI on digital transformation spend: number of years

Thinking about the spend that your company is making to support your company's digital transformation, when do you think such spend will start generating a return on investment for your company?
Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Figures represent weighted average.



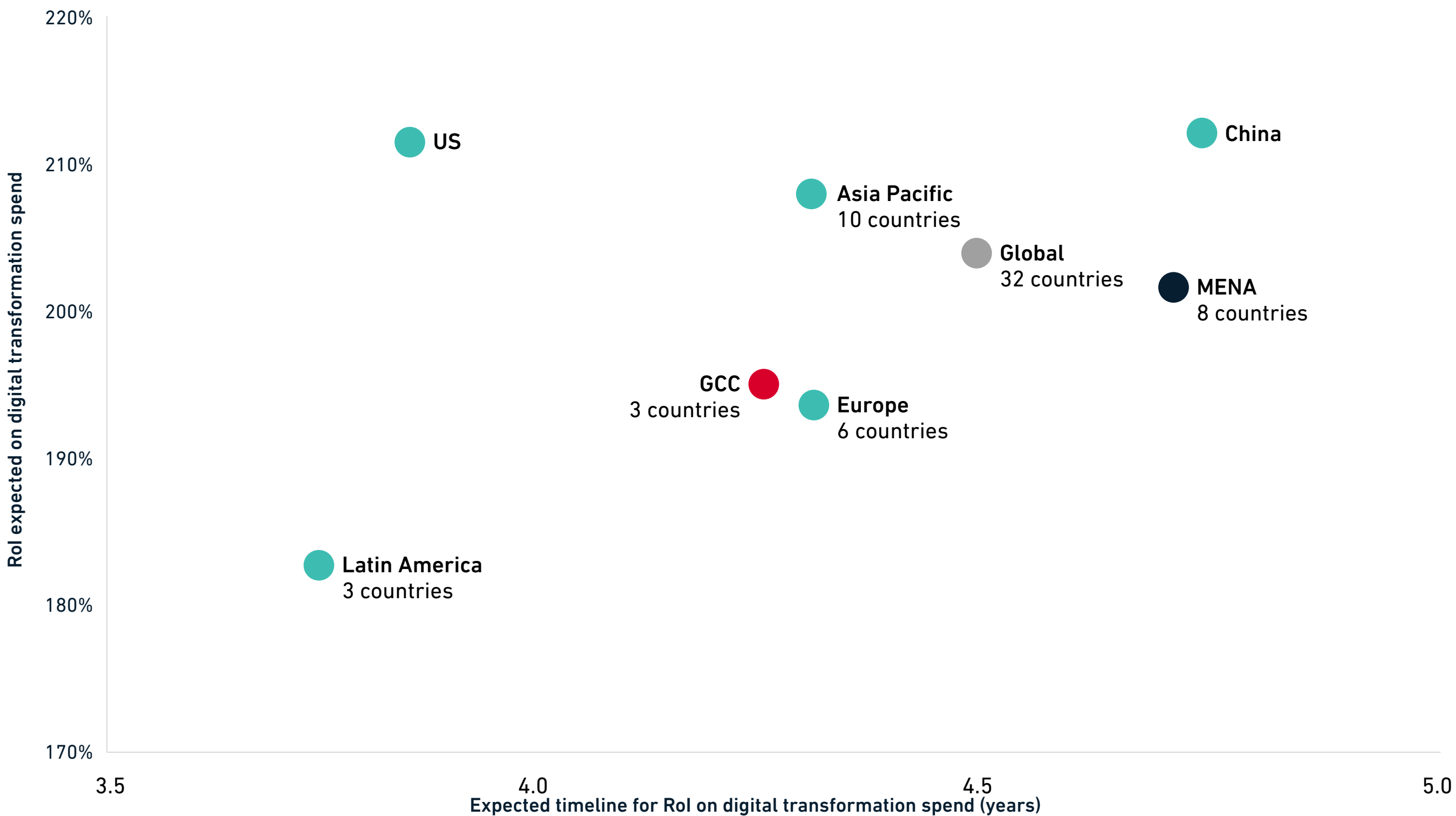
Mapping RoI and timelines for RoI

GCC and Europe are aligned on expectations; longer timelines in MENA

Direct relationship. Globally, we see a direct relationship between expected timelines for RoI (measured in number of years) and level of RoI expected (percentage of digital transformation spend); the higher the expected RoI, the longer the timeline for achieving it.

Regional variations. Enterprises in the US are the most demanding (timelines at 3.8 years; expected RoI at 210%), likely reflecting the scale of the US market and the country’s dynamic supplier environment. China also has high RoI expectations (210%) but longer timelines (4.7 years). GCC and Europe are aligned. For suppliers supporting enterprise digital transformation, understanding enterprise expectations on RoI and associated timelines is an important consideration when discussing plans and budgets with enterprises.

Mapping RoI and timelines for RoI



Suppliers of digital transformation technologies

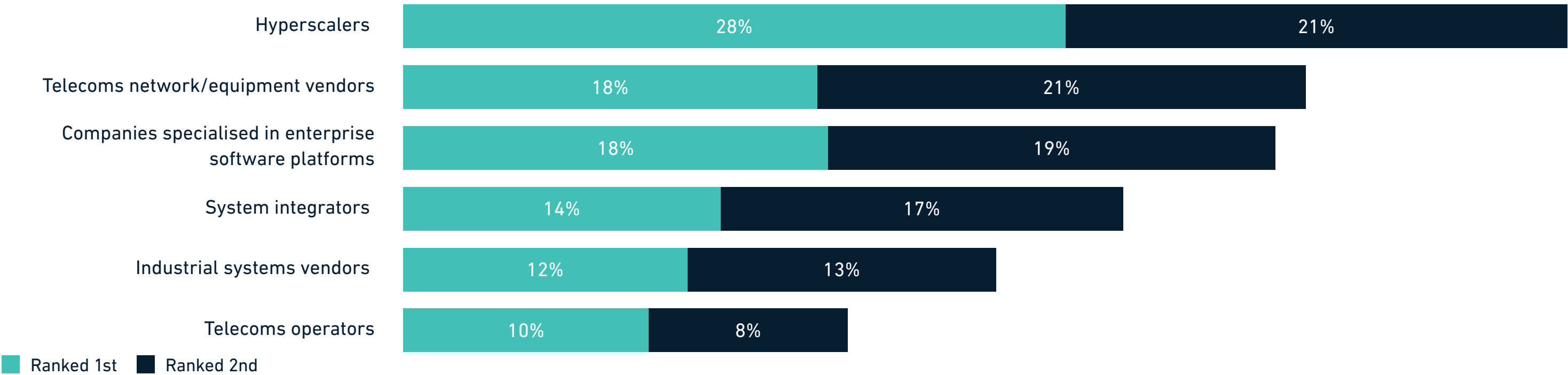
Diversity is good news, bringing competition and partnerships

Opportunities exist for all suppliers. Enterprises from the GCC and wider MENA region tend to work with a diverse range of suppliers of digital transformation technologies and solutions, including operators. For each individual technology (e.g. cloud, AI, cybersecurity, IoT), many enterprises work with two or more suppliers. Diversity of choice is good news for enterprise customers but also suppliers, as it allows the development of long-term partnerships in the ICT value chain.

Generalists (hyperscalers and telecoms network/equipment vendors) tend to be the two preferred partners for digital transformation – unsurprisingly, as they boast global reach, larger sales teams and more comprehensive/integrated portfolios of services and capabilities. Systems integrators did not rank highly, likely reflecting their back-end (yet important) rather than front-end roles. Operators are at the bottom (mentioned as a top-two preferred supplier by 18% of MENA enterprises). While a growing number of operators in the GCC and wider MENA region have successfully moved up the B2B value chain in recent years, many enterprises may still see them as (mostly) connectivity partners. MENA (18% score for operators) shows a higher figure than the global average (13%) – a positive factor operators should build on.

Suppliers of digital transformation technologies/solutions

If you could purchase all the digital transformation technologies and solutions that are needed for your company's digital transformation from one single supplier, who would be your 1st and 2nd preferred supplier? Aggregate figures across the eight MENA countries and 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.



Sum of ranked 1st and 2nd

MENA 8 countries	GCC 3 countries	Global 32 countries
49%	50%	54%
39%	41%	36%
37%	37%	40%
31%	34%	33%
25%	24%	23%
18%	14%	13%

B2B opportunities for operators

Complementing the core business with technologies and services beyond connectivity

From telco to tech-co. While operators are the biggest suppliers of mobile and fixed connectivity services to enterprises in the GCC and wider MENA region, their business beyond connectivity is (as expected) at a lower level. Service/revenue diversification has become a strategic focus for major GCC and MENA operators in recent years, with non-connectivity services now a key component of growth stories. For most, the goal is twofold: to offset low revenue growth in mobile and fixed connectivity, and grow their presence in the digital ecosystem (moving up the value chain to capture opportunities from new growth areas such as digital services, platforms and applications).

Beyond connectivity: five priority sectors. For six technologies, GSMA Intelligence compared current usage levels (limited, moderate, advanced) with importance to digital transformation (as rated by enterprises). The bigger the gap, the higher the likelihood that enterprises will invest to drive greater usage. This will be reflected in their spend for the technology. Building on recent progress, GCC and MENA operators should target a greater share in services beyond connectivity, either focusing on selected technologies or through a cross-service horizontal approach (the latter also involves a tech orchestrator role). The top five sectors to prioritise vary by technology. However, there is some overlap, which is good news for operators seeking to provide a comprehensive (and often integrated) portfolio of B2B services/capabilities, as it allows synergies and helps them position as a tech orchestrator. For operators prioritising a horizontal approach, manufacturing and industrial sectors, retail, and transportation, logistics and warehousing offer the biggest opportunities.

Five priority sectors

	5G	AI	IoT	Cloud	Edge	Cybersecurity
1	Automotive and mobility	Manufacturing and industrial sectors	Agriculture, forestry and fishing	Retail	Manufacturing and industrial sectors	Agriculture, forestry and fishing
2	Retail	Retail	Manufacturing and industrial sectors	Manufacturing and industrial sectors	Healthcare	Retail
3	Transportation, logistics and warehousing	Utilities and energy	Public sector	Automotive and mobility	Retail	Public sector
4	Healthcare	Public sector	Retail	Agriculture, forestry and fishing	Transportation, logistics and warehousing	Automotive and mobility
5	Manufacturing and industrial sectors	Transportation, logistics and warehousing	Utilities and energy	Transportation, logistics and warehousing	Utilities and energy	Manufacturing and industrial sectors

Source GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2025

B2B opportunities for operators

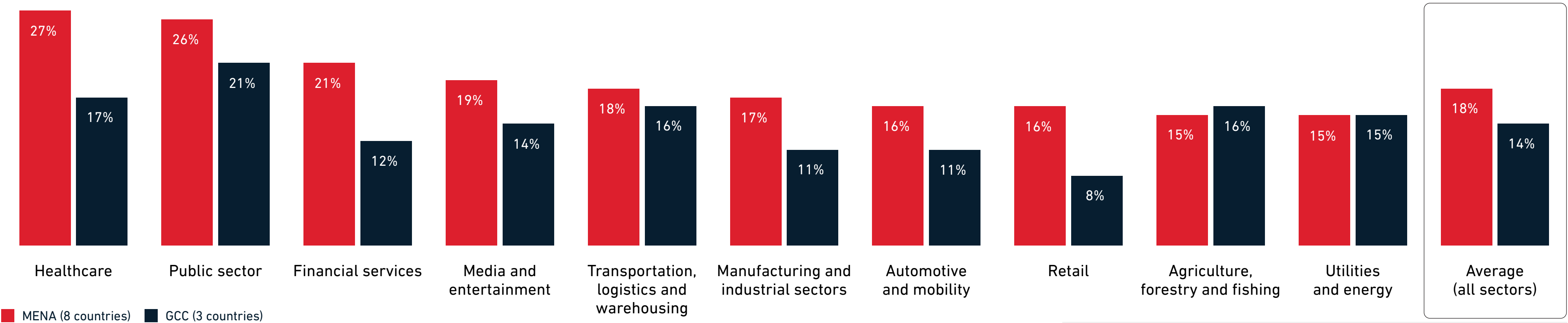
Becoming the go-to, long-term, digital transformation partners for enterprises

Digital transformation partners. In addition to targeting growth in technologies and services beyond connectivity (either focusing on selected technologies or through a cross-service horizontal approach), various GCC and MENA operators are moving a step higher, demonstrating their ability to be the go-to, long-term partners for enterprise customers. 18% of enterprises claimed operators would be their first or second preferred supplier if they could purchase all the digital transformation technologies/solutions from one single supplier (14% in the GCC) – a solid starting point.

The 2024 survey showed that, globally, the top three reasons behind enterprises working with operators were telcos’ expertise in three areas: working with different ecosystem stakeholders, managing connectivity networks and providing secure solutions. These are core factors to leverage. Some vertical sectors look more promising for operators, including healthcare (27% score), public sector (26%) and financial services (21%). Interestingly, these are sectors where network vendors (e.g. Ericsson, Nokia, Huawei, ZTE) had the highest scores, suggesting that operator/vendor partnerships may be a viable scenario to capture more enterprise customers. Moving up the ICT value chain (beyond connectivity) and playing a tech orchestration role are key to forge long-term partnerships and relationships with other suppliers and enterprise customers.

Enterprises rating operators as their preferred suppliers of digital transformation technologies/solutions

Base is enterprises undertaking digital transformation. Percentage of respondents that picked operators as either their 1st or 2nd preferred supplier.



Suppliers of AI tech

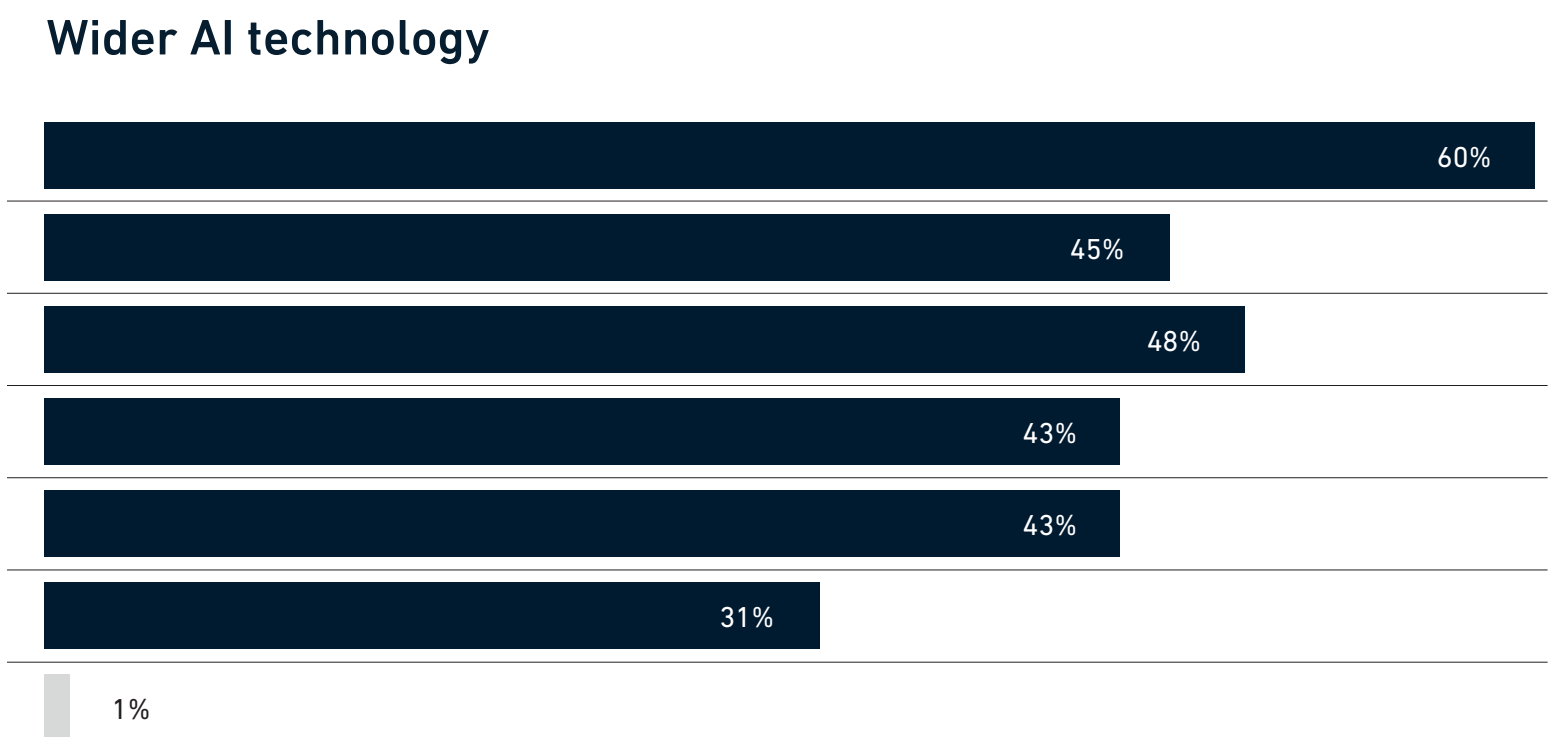
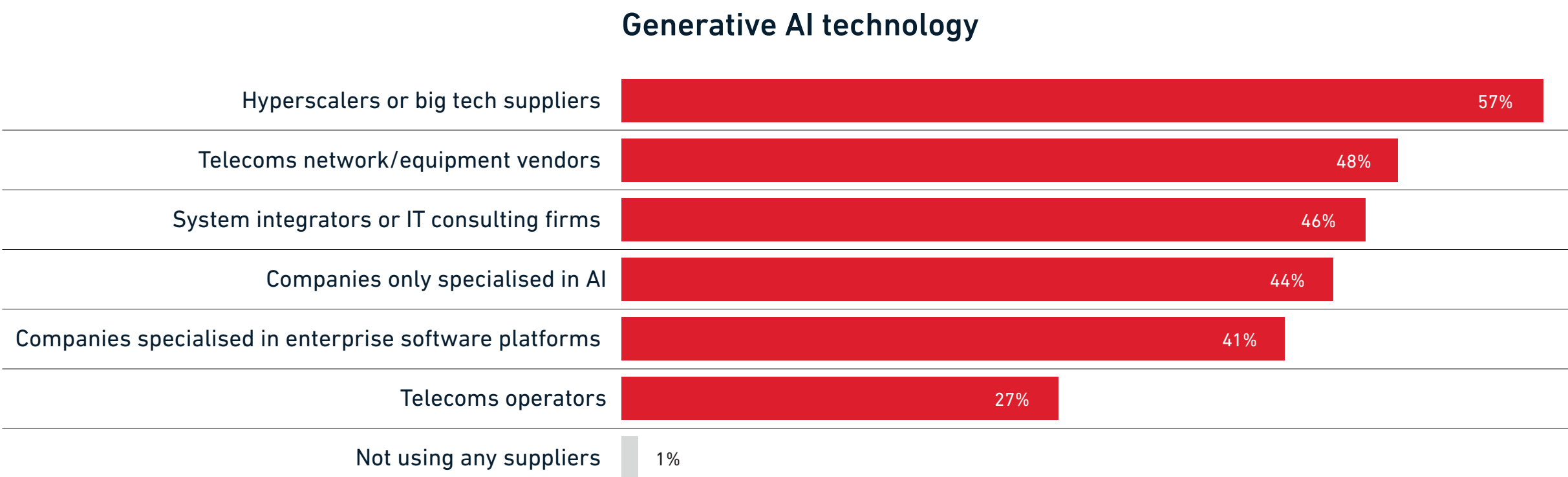
No clear winner; AI tech is diverse, requiring work with multiple suppliers

AI is a top spend priority. Enterprises from the GCC and wider MENA region will spend 18% of their digital transformation budget on AI technology (equally split between genAI and wider AI, both at 9%). There is no clear inverse correlation between today’s use of AI technology and future spend on it. Regardless of where an enterprise (or vertical sector) stands in terms of current use of AI, today’s investment is only the beginning, as implementing AI at scale (for all purposes) requires resources and spend.

From a supplier perspective, GCC and MENA enterprises tend to work with multiple AI suppliers. Many have two or more suppliers. While hyperscalers (e.g. AWS, Google, Microsoft, IBM) show the highest score (60% of MENA enterprises work with them on AI), there are five categories of supplier significantly involved in helping MENA enterprises advance AI implementation. On a relative basis, operators are less used by enterprises as AI partners (30% use them in MENA). However, MENA shows a much higher figure than the global average (the latter being 20%), with Qatar and Saudi Arabia both at 30%, reflecting recent developments and progress from GCC operators on AI (including building new data-centre facilities).

Suppliers of AI technology

What type of supplier is your company currently using for the implementation of generative AI or wider AI initiatives?
Aggregate figures across the eight MENA countries and 10 vertical sectors surveyed. Base is enterprises that are already using or testing AI technology (genAI or wider AI technology). Percentage of respondents. Respondents could select all that apply.



Enterprises working with operators for AI

Diverse range of support areas is good and bad news

Some 30% work with operators. On average across the 10 vertical sectors surveyed, 30% of MENA enterprises work in some way with operators on AI initiatives. The top three sectors are public sector (36%), media and entertainment (36%) and utilities and energy (34%). The bottom two are agriculture, forestry and fishing (18%) and manufacturing and industrial sectors (19%).

Deeper analysis shows that SMEs tend to work with operators more than large or mega enterprises do (the latter tend to work more with hyperscalers or big-tech suppliers), representing an important target for telcos. When looking at how MENA and GCC operators are supporting enterprise customers on AI, there is no clear winner. This is good news (operators can target different roles) and bad news (it makes operators more vulnerable to shifting competitive dynamics). In general, enterprises seek telco support for network, security and tech aspects much more than for consultative roles or ecosystem networking relationships. The consultative role is also more for individual AI initiatives rather than wider AI strategy, planning and implementation.

Enterprises working with operators for AI: operator areas of support

How are operators supporting your company on AI initiatives? Aggregate figures across the eight MENA countries and 10 vertical sectors surveyed. Base is enterprises that are working with telco operators for AI (genAI and/or wider AI). Percentage of respondents. Respondents could select all that apply.



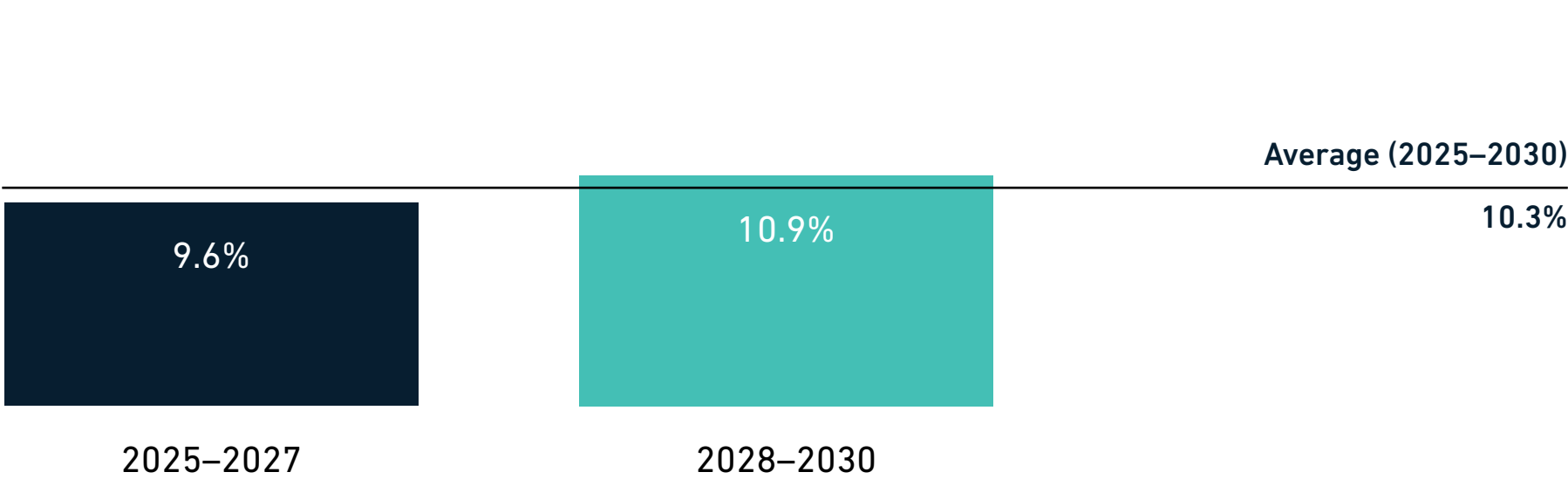
CONTENTS

- 1 Executive summary
- 2 Digital transformation of industries and countries
- 3 Technologies enabling digital transformation
- 4 Enterprise spend on digital transformation and the B2B opportunity
- 5 Countries at a glance
- 6 Survey details

Digital transformation of industries: selected findings

Enterprise spend on digital transformation

Percentage of enterprise revenues



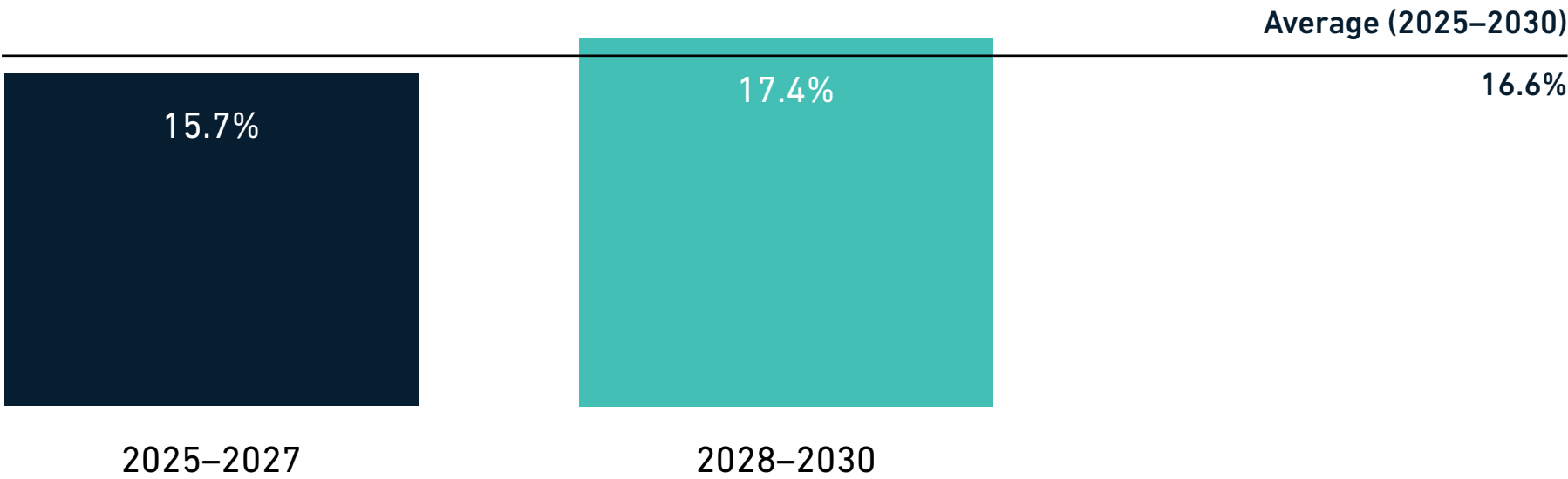
Importance of 5G for digital transformation

Top three vertical sectors

- 1 Manufacturing and industrial sectors
- 2 Retail
- 3 Agriculture, forestry and fishing

Enterprise spend on AI

Percentage of enterprise revenues



Digital transformation deployment challenges

Top three

- 1 Potential security vulnerabilities
- 2 Cost of implementing digital transformation
- 3 Lack of internal expertise in digital transformation

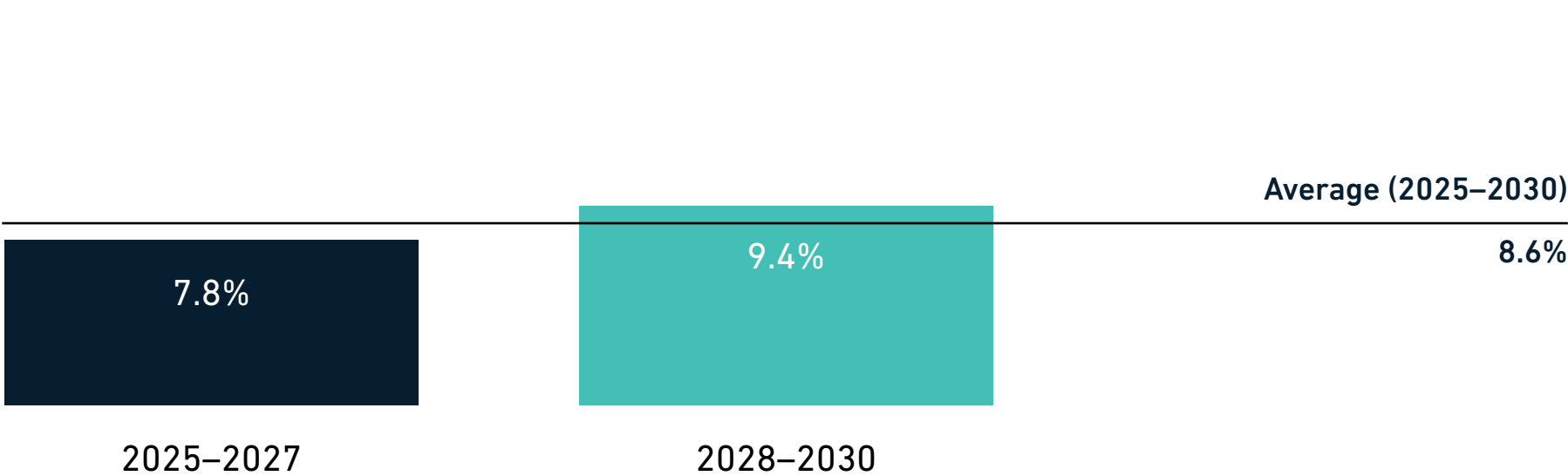
Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.



Digital transformation of industries: selected findings

Enterprise spend on digital transformation

Percentage of enterprise revenues



Importance of 5G for digital transformation

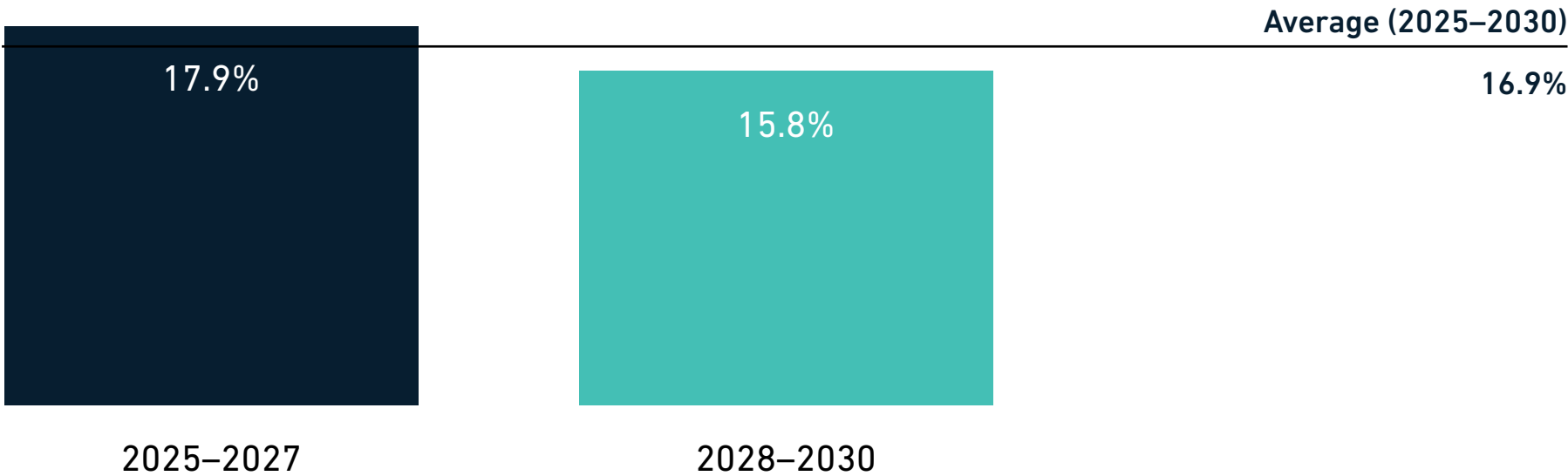
Top three vertical sectors

- 1 Automotive and mobility
- 2 Manufacturing and industrial sectors
- 3 Healthcare

Countries at a glance

Enterprise spend on AI

Percentage of enterprise revenues



Digital transformation deployment challenges

Top three

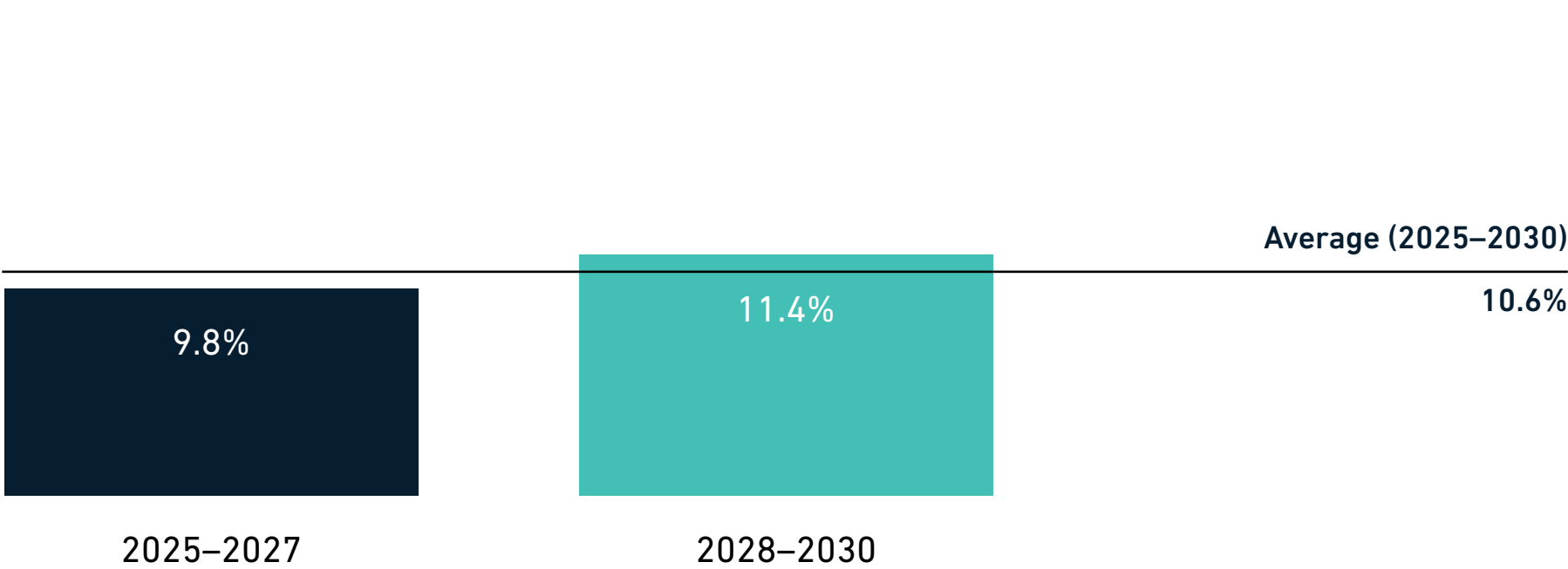
- 1 Navigating the various options that are available for use
- 2 Some of the digital transformation technologies are not mature or not fully standardised
- 3 Uncertain return on investment on digital transformation (i.e. benefits versus cost)

Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

Digital transformation of industries: selected findings

Enterprise spend on digital transformation

Percentage of enterprise revenues



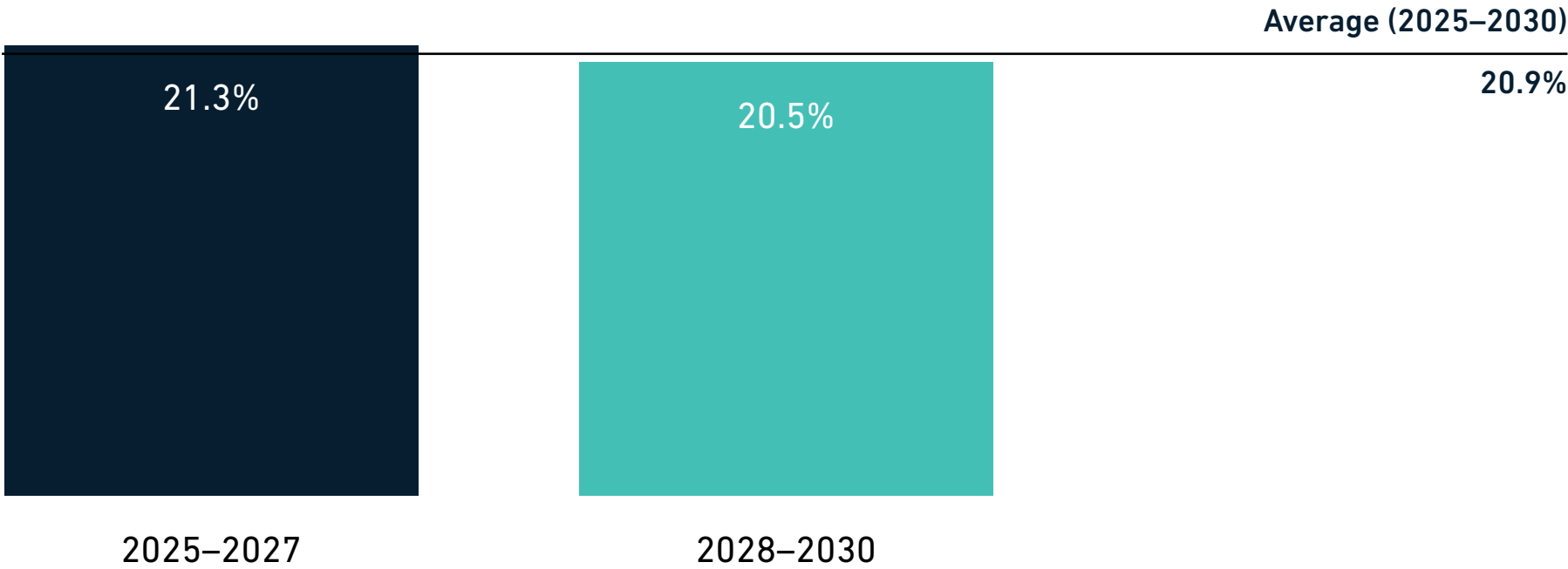
Importance of 5G for digital transformation

Top three vertical sectors

- 1 Public sector
- 2 Financial services
- 3 Automotive and mobility

Enterprise spend on AI

Percentage of enterprise revenues



Digital transformation deployment challenges

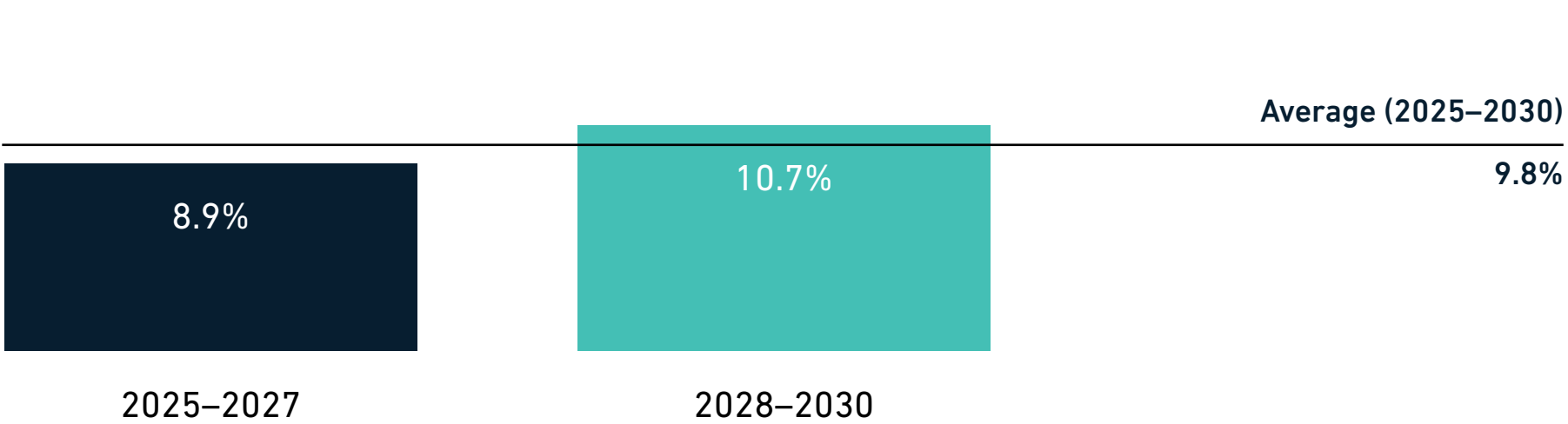
Top three

- 1 Cost of implementing digital transformation
- 2 Lack of internal expertise in digital transformation
- 3 Potential security vulnerabilities

Digital transformation of industries: selected findings

Enterprise spend on digital transformation

Percentage of enterprise revenues



Importance of 5G for digital transformation

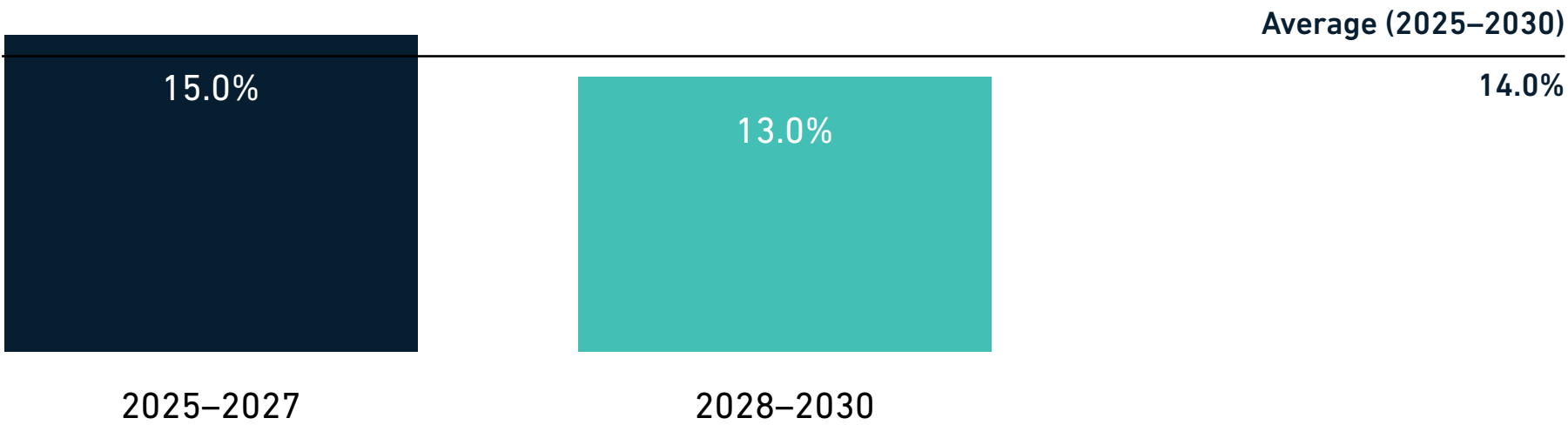
Top three vertical sectors

- 1 Utilities and energy
- 2 Healthcare
- 3 Media and entertainment

Countries at a glance

Enterprise spend on AI

Percentage of enterprise revenues



Digital transformation deployment challenges

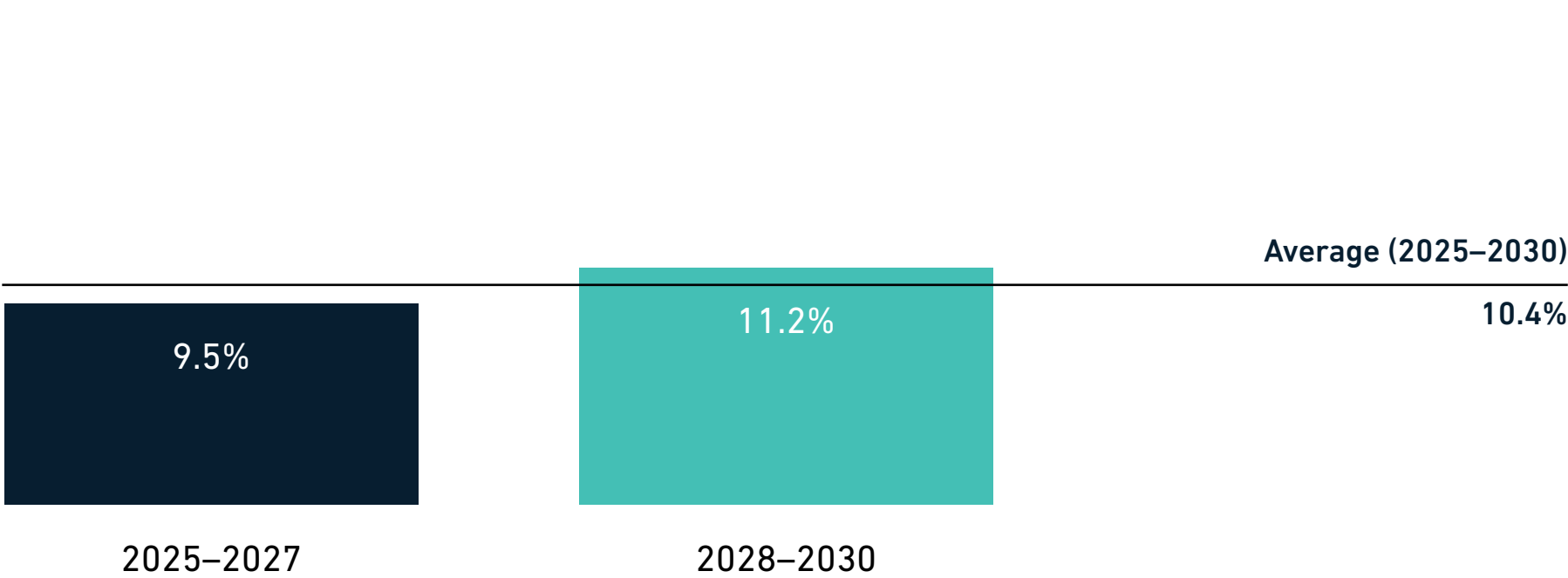
Top three

- 1 Navigating the various options that are available for use
- 2 Cost of implementing digital transformation
- 3 Integration of new technologies with existing technologies

Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

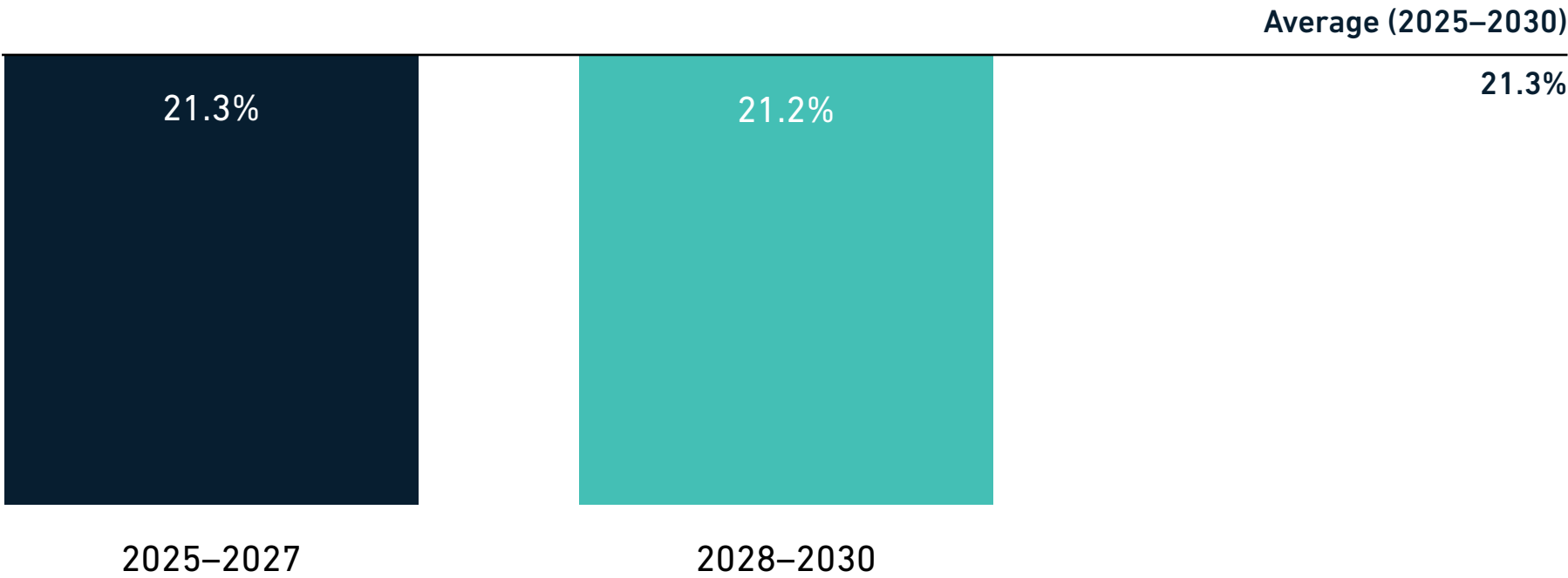
Enterprise spend on digital transformation

Percentage of enterprise revenues



Enterprise spend on AI

Percentage of enterprise revenues



Importance of 5G for digital transformation

Top three vertical sectors

- 1 Agriculture, forestry and fishing
- 2 Manufacturing and industrial sectors
- 3 Healthcare

Digital transformation deployment challenges

Top three

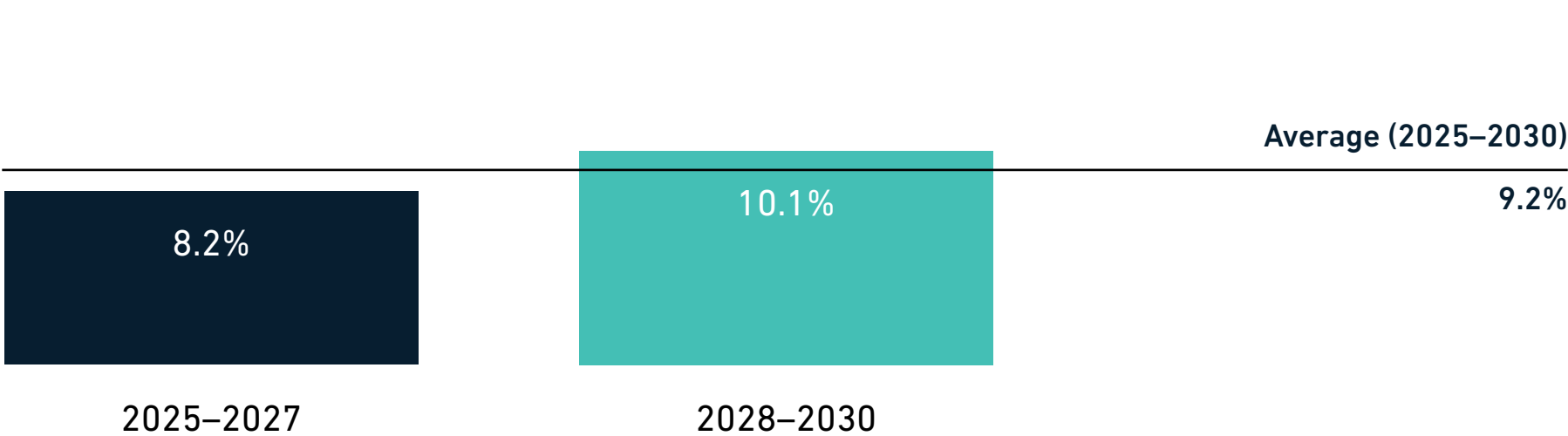
- 1 Potential security vulnerabilities
- 2 Integration of new technologies with existing technologies
- 3 Cost of implementing digital transformation

Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

Digital transformation of industries: selected findings

Enterprise spend on digital transformation

Percentage of enterprise revenues



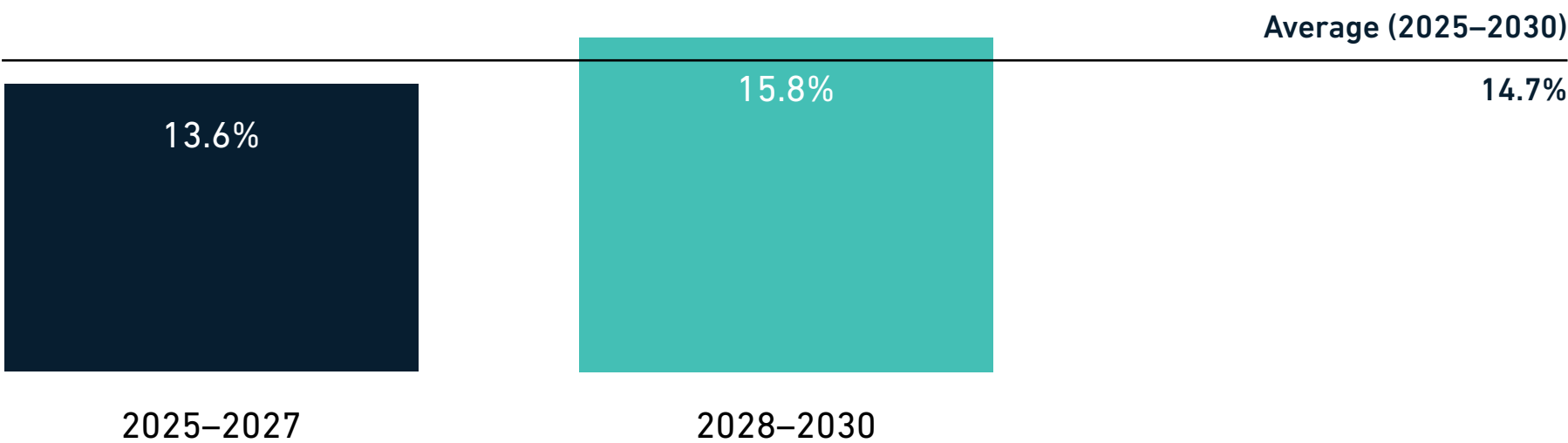
Importance of 5G for digital transformation

Top three vertical sectors

- 1 Transportation, logistics and warehousing
- 2 Automotive and mobility
- 3 Financial services

Enterprise spend on AI

Percentage of enterprise revenues



Digital transformation deployment challenges

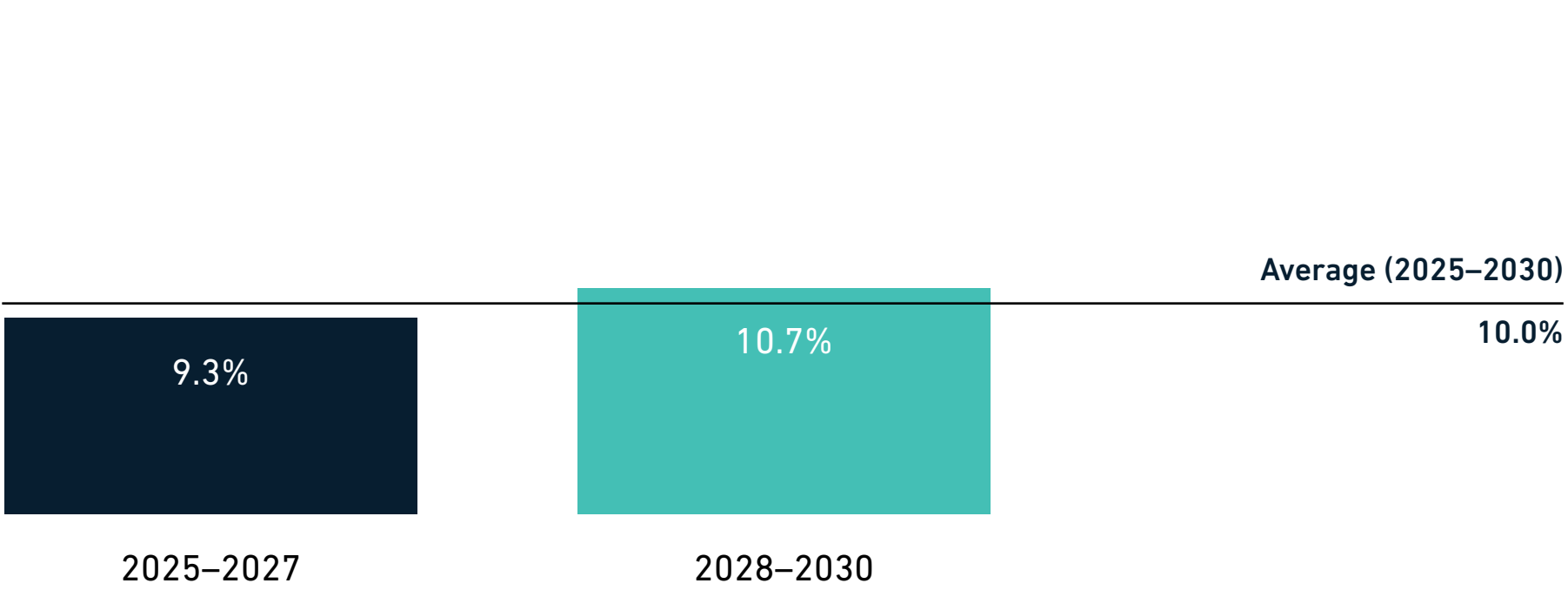
Top three

- 1 Navigating the various options that are available for use
- 2 Potential security vulnerabilities
- 3 Some of the digital transformation technologies are not mature or not fully standardised

Digital transformation of industries: selected findings

Enterprise spend on digital transformation

Percentage of enterprise revenues



Importance of 5G for digital transformation

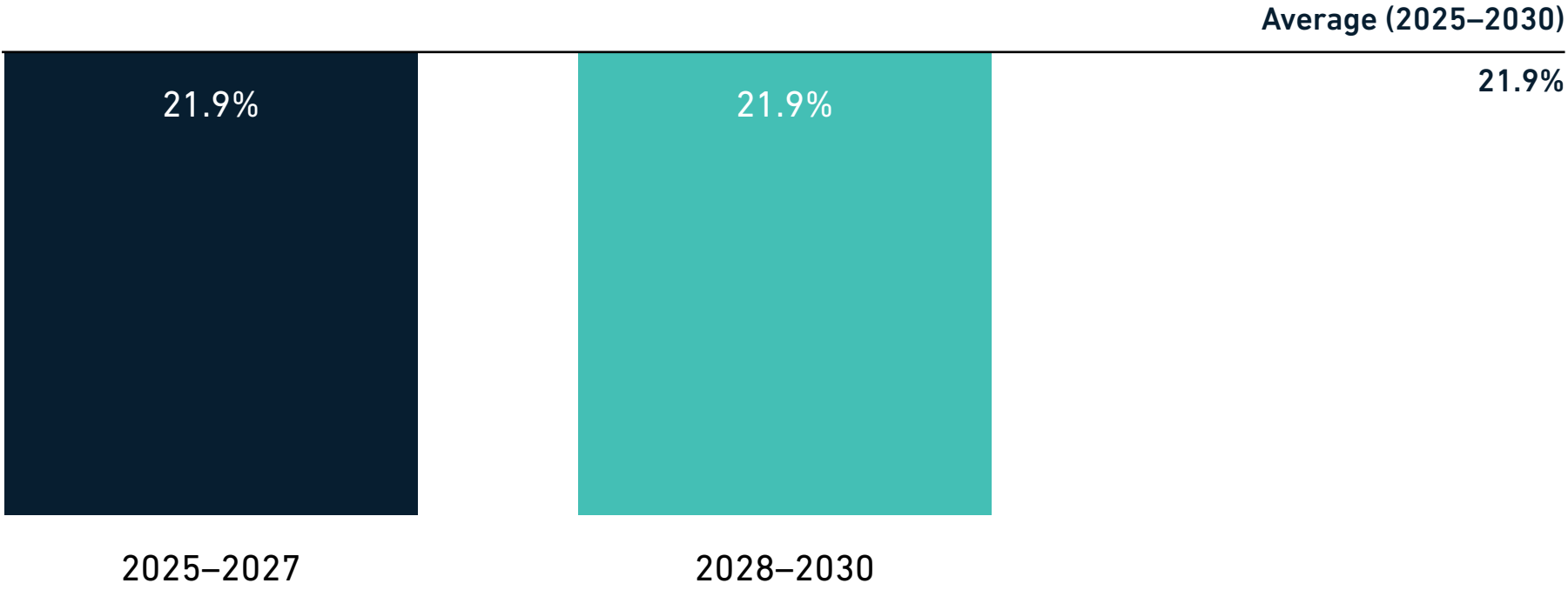
Top three vertical sectors

- 1 Financial services
- 2 Public sector
- 3 Retail

Countries at a glance

Enterprise spend on AI

Percentage of enterprise revenues



Digital transformation deployment challenges

Top three

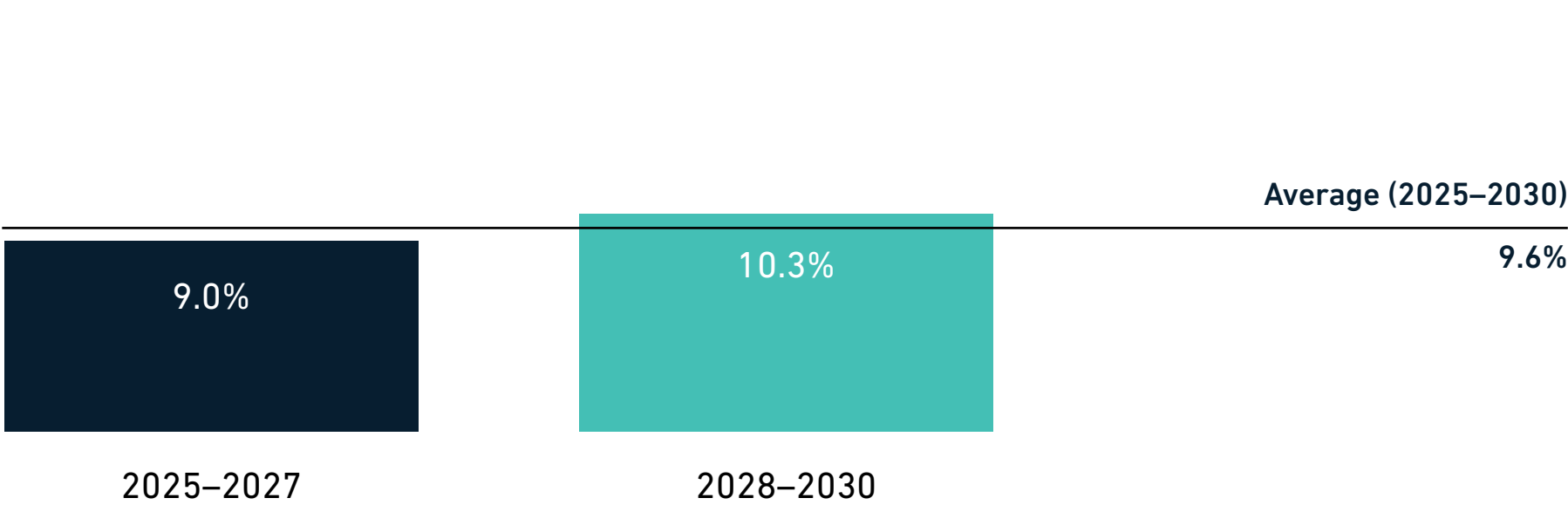
- 1 Cost of implementing digital transformation
- 2 Potential security vulnerabilities
- 3 Limited choice of suppliers for digital transformation technologies

Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

Digital transformation of industries: selected findings

Enterprise spend on digital transformation

Percentage of enterprise revenues



Importance of 5G for digital transformation

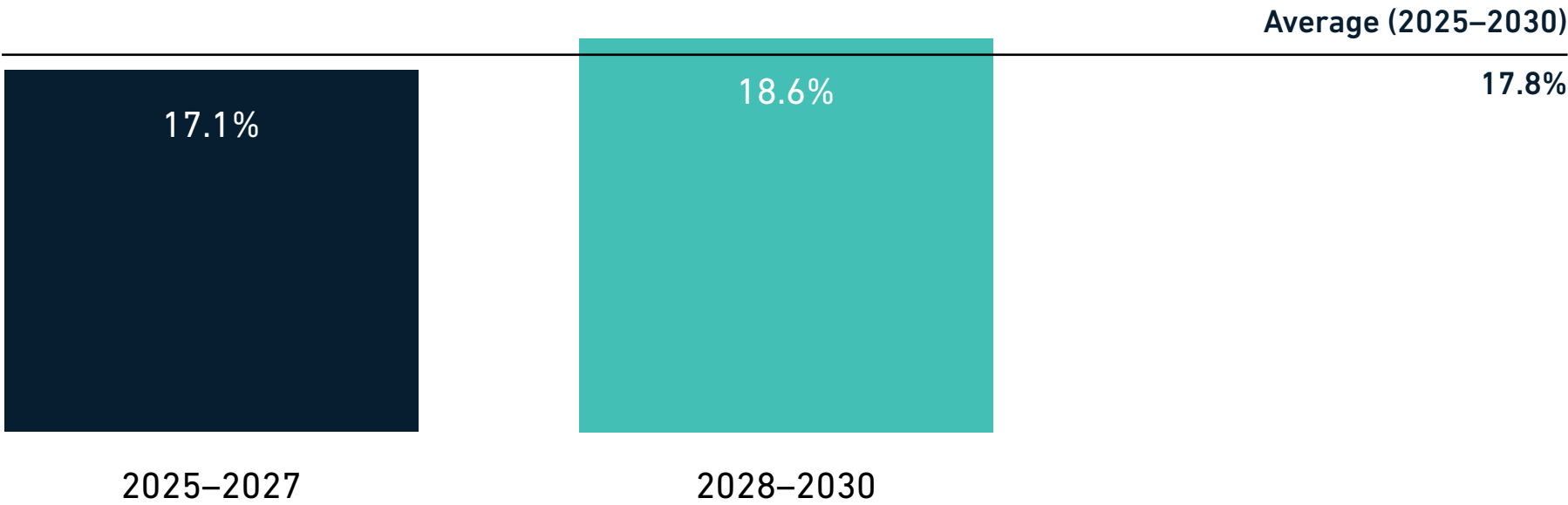
Top three vertical sectors

- 1 Media and entertainment
- 2 Financial services
- 3 Financial services

Countries at a glance

Enterprise spend on AI

Percentage of enterprise revenues



Digital transformation deployment challenges

Top three

- 1 Integration of new technologies with existing technologies
- 2 Navigating the various options that are available for use
- 3 Cost of implementing digital transformation

CONTENTS

- 1 Executive summary
- 2 Digital transformation of industries and countries
- 3 Technologies enabling digital transformation
- 4 Enterprise spend on digital transformation and the B2B opportunity
- 5 Countries at a glance
- 6 Survey details

GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2025

During June–August 2025, GSMA Intelligence surveyed 5,320 enterprises undertaking digital transformation across 32 countries and 10 vertical sectors to gain insight into their digital transformation. For each enterprise, GSMA Intelligence targeted respondents who either are decision-makers for digital transformation plans/projects or provide recommendations

to decision-makers. The survey focused on various aspects of digital transformation (e.g. strategic objectives, investment plans and priorities, deployment challenges, supplier decisions) and a range of technologies enabling digital transformation, including 5G, private networks, AI, IoT, cloud, edge, cybersecurity, network APIs and 6G.

Countries included in the survey

Americas	Middle East and Africa	Europe	Eurasia	Asia Pacific
Argentina	Egypt*	France	Azerbaijan	Australia
Brazil	Iraq*	Germany	Kazakhstan	China
Mexico	Morocco*	Italy	Uzbekistan	India
US	Qatar*	Poland		Indonesia
	Saudi Arabia*	Spain		Japan
	South Africa	UK		Malaysia
	Tunisia*			Singapore
	Türkiye*			South Korea
	UAE*			Thailand
				Vietnam

Vertical sectors

- Manufacturing and industrial sectors
- Transportation, logistics and warehousing
- Automotive and mobility
- Utilities and energy
- Financial services
- Healthcare
- Retail
- Media and entertainment
- Agriculture, forestry and fishing
- Public sector

*MENA: 851 enterprises across eight countries and 10 vertical sectors. The three GCC countries (Qatar, Saudi Arabia and UAE) account for almost 40% of the total MENA sample (323 enterprises).

Global Digital Transformation Survey 2025

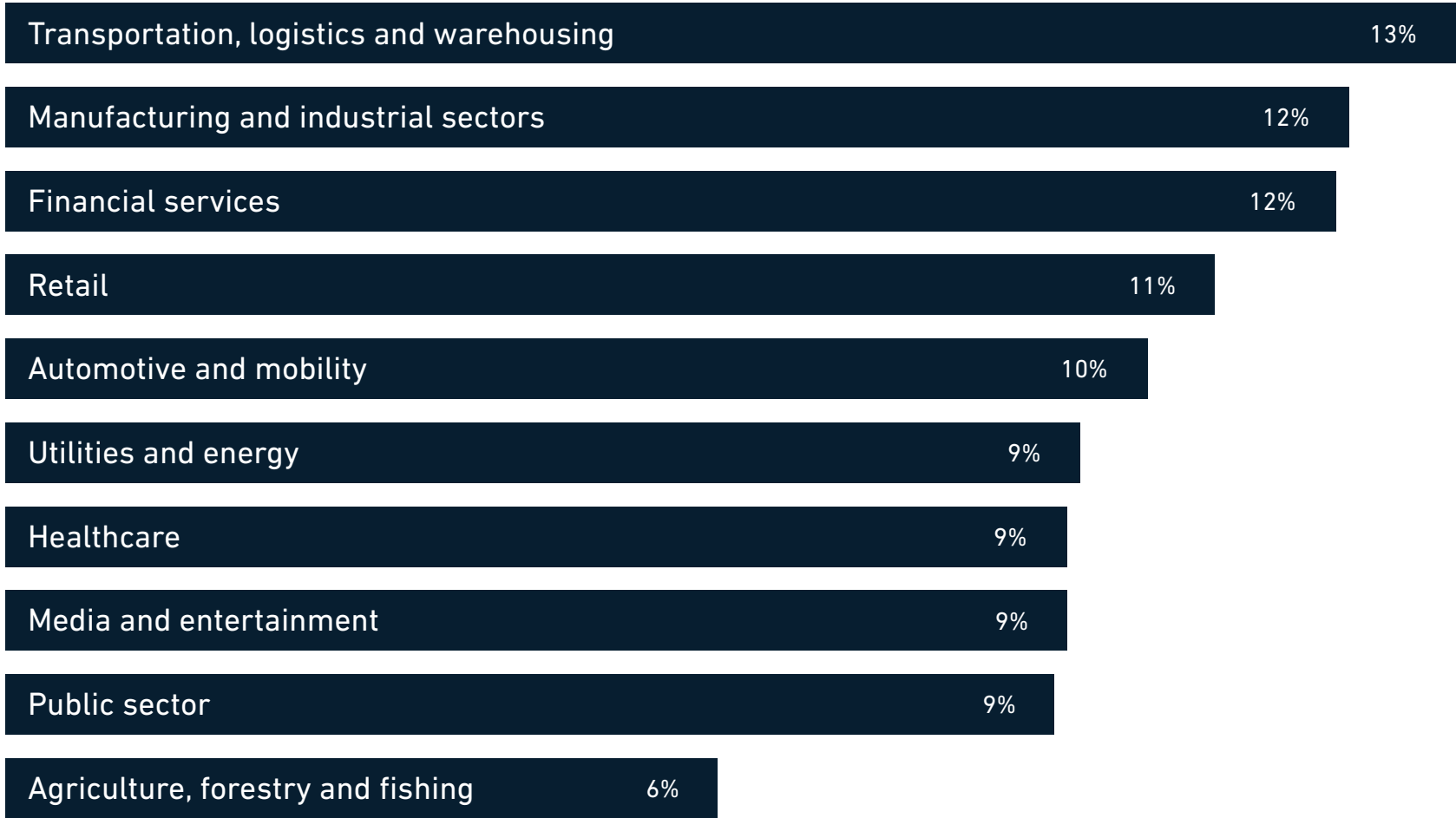
10 vertical sectors in focus

Vertical sectors	Sub-sectors
Manufacturing and industrial sectors	Aerospace and defence; chemicals; construction and materials; mechanical and electrical engineering; industrial machinery and equipment; metals and mining; textiles, apparel, leather, footwear and luxury goods; consumer electronics; basic metals production; other areas in manufacturing and industrial sectors.
Transportation, logistics and warehousing	Air freight and logistics; ground freight and logistics; maritime freight and logistics; warehousing and storage; third-party logistics; postal, courier and delivery services; supply chain and logistics technology; other areas in transportation, logistics and warehousing.
Automotive and mobility	Manufacturing of passenger vehicles; manufacturing of commercial vehicles; electric and autonomous vehicles; auto parts and equipment; services and maintenance; airports and aviation; ports; railway; other areas in automotive and mobility.
Utilities and energy	Electricity, gas or water; oil & gas; coal; renewables (wind, wave, solar); energy infrastructure, equipment and services; waste collection, treatment and disposal activities; mining and quarrying; other areas in utilities and energy
Financial services	Banking; insurance; real-estate investment; asset management; private equity and venture capital; credit services; brokerage services; other areas in financial services.
Healthcare	Healthcare providers and services; pharmaceuticals; biotechnology; life sciences tools and services; healthcare technology; medical devices and equipment; other areas in healthcare.
Retail	Food, beverage and tobacco retailers; apparel retailers (clothes, footwear, accessories); consumer electronics retailers; furniture and homeware retailers; e-commerce; specialty retailers (jewellery, booking, sporting attire, plants, etc.); restaurants and bars; hotels; other areas in retail.
Media and entertainment	Programming and broadcasting activities (radio and TV); film and television production/distribution; publishing; music; advertising and marketing; digital media; video games and e-sports; live entertainment; other areas in media and entertainment.
Agriculture, forestry and fishing	Crop production; animal production; fishing; forestry; other areas in agriculture, forestry and fishing.
Public sector	Public education; public healthcare; military and defence; law enforcement; public transportation; social services; other public services (e.g. justice and judicial activities, fire services); other areas in public sector.

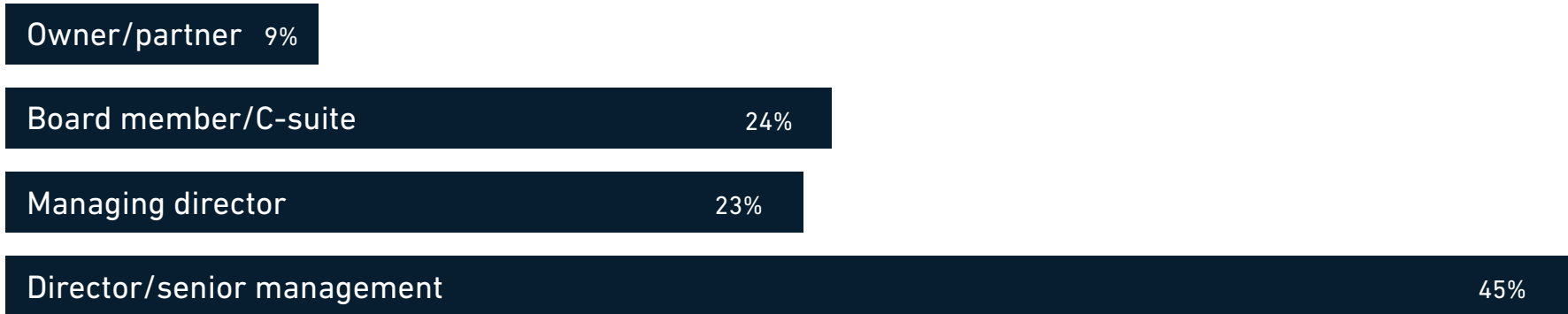
Global Digital Transformation Survey 2025: Details on MENA

851 enterprises across eight countries and 10 vertical sectors

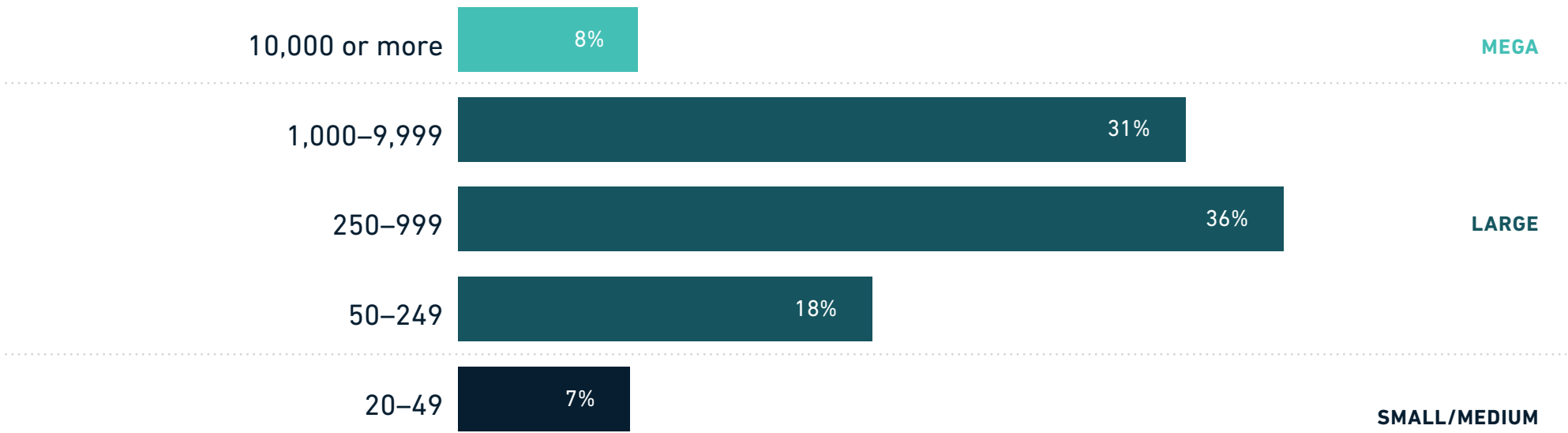
Survey breakdown by vertical sector



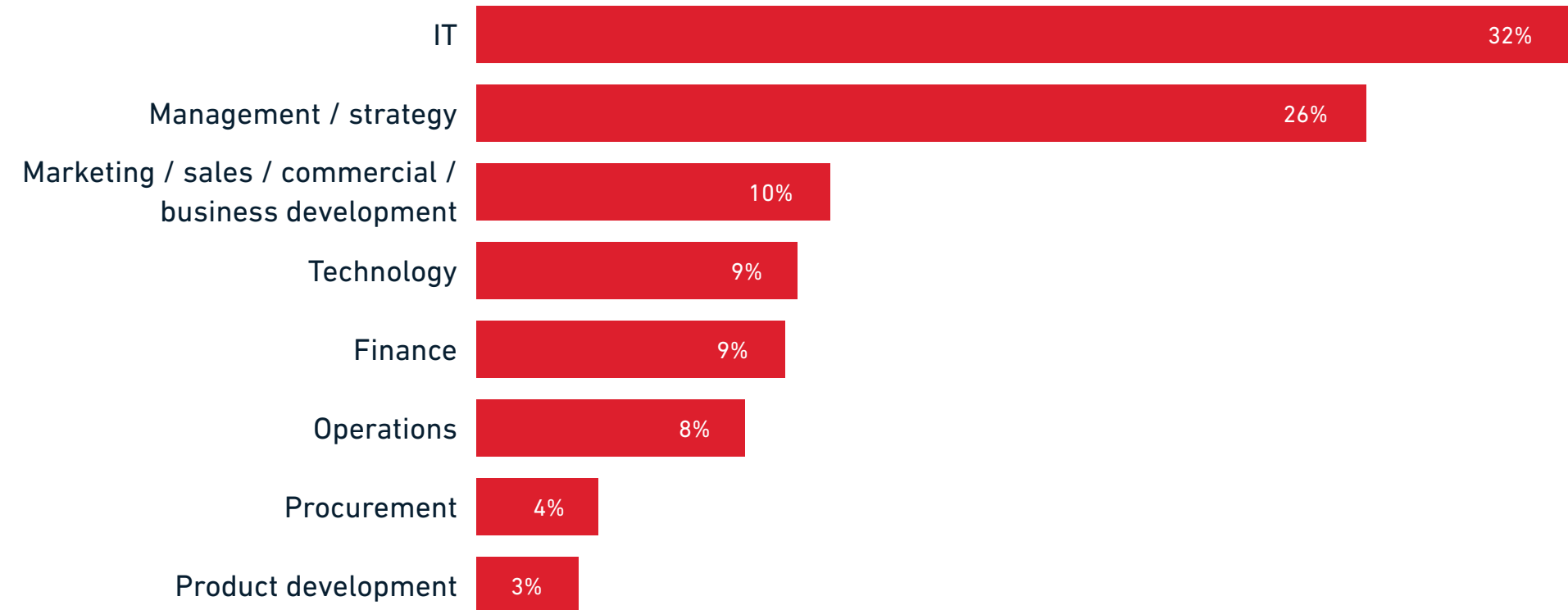
Survey breakdown by respondent job level



Survey breakdown by organisation size (number of employees)



Survey breakdown by respondent job function



Global Digital Transformation Survey 2025

Methodology notes

**Digital transformation of industries in MENA:
Ranking and mapping of vertical sectors**

For each vertical sector, GSMA Intelligence used data from the survey as an input to calculate a score for each of the three key aspects of digital transformation and the overall score. The ranking is only based on survey data so does not represent an official ranking. As with all surveys, there may be a margin of error (i.e. survey findings not being fully representative of the actual picture).

**Digital transformation of industries worldwide:
Mapping of countries**

For each country, GSMA Intelligence used data from the survey as an input to calculate a score for each of the three key aspects of digital transformation and the overall score. The ranking is only based on survey data so does not represent an official ranking. As with all surveys, there may be a margin of error (i.e. survey findings not being fully representative of the actual picture).



GSMA
Intelligence

gsmaintelligence.com