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Enterprise in Focus

# Enterprise survey for the GCC and wider MENA region: navigating the digital transformation of industries and the B2B opportunity

DATE

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# GSMA

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 www.gsma.com


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# 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.

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# **Context:** GSMA Intelligence Digital Transformation Survey 2026

In recent years, B2B has emerged as a strategic growth area for operators and the wider tech/digital ecosystem. As the digital transformation of vertical sectors accelerates, gaining insights directly from enterprises is key, in order to:

- formulate the right B2B strategies and capitalise on the opportunity
- support the development of a favourable tech and policy environment that can foster innovation, leadership and monetisation.

During May–July 2026, GSMA Intelligence surveyed 6,342 enterprises across 50 countries and 10 vertical sectors worldwide to gain insight into their digital transformation (slide 56).

For MENA, the survey included 885 enterprises across 10 countries. Of these, 423 enterprises were from the GCC, across five countries.

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 are also available, providing access to the full insights.

| Countries in MENA | Vertical sectors | Focus areas |
|---|---|---|
| Egypt | Manufacturing and industrial sectors | Digital transformation overall (enterprise objectives and priorities; investments; deployment challenges; supplier decisions) |
| Iraq | Transportation, logistics and warehousing | |
| Kuwait | Automotive and mobility | |
| Morocco | Utilities and energy | Enabling technologies including 5G, 6G, AI, IoT, cloud, edge, cybersecurity |
| Oman | Financial services | |
| Qatar | Healthcare | |
| Saudi Arabia | Retail | Tech sovereignty |
| Tunisia | Media and entertainment | Telecoms policy and regulation |
| Türkiye | Agriculture, forestry and fishing | |
| UAE | Public sector | |

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# **Findings:** the digital transformation of enterprises and vertical sectors

1. **Enterprises seek a range of objectives through digital transformation.** While cybersecurity is the lead objective in most other regions, enterprises in MENA place a similarly high level of importance on competitive positioning and revenue growth, with all three rated “very important” by more than two thirds of enterprises. Cost of implementation and tech integration form the top two digital transformation deployment challenges across the region.

2. **Digital transformation spend on the rise.** Enterprises in MENA expect to spend 9.3% of revenue on digital transformation through to 2032. Spending increases markedly with company size (11.3% among mega enterprises). AI and 5G will account for a third of total spend. Hyperscalers are the preferred digital transformation partner in eight of the 10 vertical sectors surveyed. Operators are among the top-two choices for 21% of enterprises (up to 28% in some verticals) – the highest ratio of any region and up from 18% in 2025.

3. **5G and AI underpin digital transformation.** Over two thirds of enterprises in MENA identify 5G as the most important connectivity technology for digital transformation. Stronger security, private wireless networks and enhanced connectivity are seen as the top-three 5G benefits. Among enterprises undertaking digital transformation, adoption of AI is growing, with 44% already making advanced use of it. Around 60% of them report a clear, positive impact.

4. **Tech sovereignty still in its early stages.** For most enterprises in MENA, understanding the possible areas of tech sovereignty requirements and defining an implementation strategy are still work in progress. Nevertheless, there is a consensus that tech sovereignty is “very important”. Enterprises are willing to pay an extra 13.2% for sovereign tech, higher than the 12.9% global average. Enterprises in the UAE, Saudi Arabia and Egypt are willing to pay up to 15% extra for sovereign tech.

5. **Scope for stronger telecoms policy support.** Although a third of enterprises in MENA feel strongly supported, nearly as many enterprises (27%) claimed that, in the past 24 months, telecoms policy and regulatory requirements had a negative impact on their digital transformation projects. In the GCC, enterprises feel more supported, with Saudi Arabia and the UAE reporting among the strongest support levels globally. Enterprises in MENA claim accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud, and 6G in the future) should be the main telecoms policy goal to advance digital transformation in the region.

# Eight numbers to note

| | | |
|---|---|---|
| **Objectives** | **Two thirds** | **Leading digital transformation objectives**<br>There is no single leading objective. Two thirds of MENA enterprises cited enhanced security, competitive positioning, revenue growth and customer experience as extremely important. |
| **Deployment challenges** | **4 in 10** | **Enterprises facing cost/integration challenges**<br>The top-two challenges faced by MENA enterprises are cost of implementation and integration of new technologies with legacy systems. Both are cited by 41% of enterprises. |
| **AI** | **60%** | **Enterprises reporting a clear, positive impact**<br>Among enterprises in MENA undertaking digital transformation, AI adoption is growing, with 44% already making advanced use of it. Of these, 60% report clear benefits. |
| **Tech sovereignty** | **13.2%** | **Willingness to pay extra**<br>Enterprises are willing to pay an extra 13.2% for sovereign tech, ranging from 12.5% for hardware to 14.2% for cybersecurity. In the GCC, willingness to pay extra climbs to 13.5%. |
| **Spend** | **9.3%** | **Enterprise spend on digital transformation**<br>On average, enterprise spend on digital transformation will account for 9.3% of enterprise revenue for 2026–2032. For mega enterprises, the figure increases to 11.3%. |
| **Suppliers** | **21%** | **Enterprises selecting operators as top two**<br>Hyperscalers are the preferred supplier for digital transformation across most verticals. Operators were cited as 1st or 2nd preferred suppliers by 21% of enterprises – the highest regional ratio globally. |
| **5G** | **7 in 10** | **5G importance for digital transformation**<br>69% of MENA enterprises see 5G as the most important connectivity network underpinning digital transformation, followed by fixed and 4G. Satellite is making inroads as a complementary tech. |
| **Telecoms policy and regulation** | **6 in 10** | **Enterprises strongly supported**<br>61% of MENA enterprises believe current rules and frameworks support digital transformation. By contrast, 27% report a negative impact on projects. For the GCC, the figures are 70%/23%. |

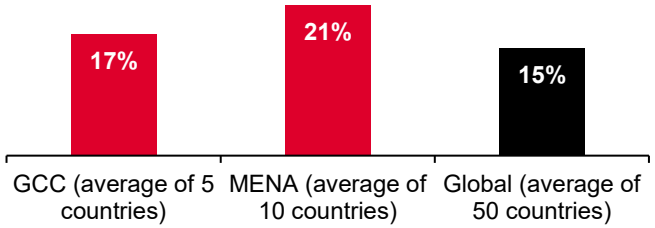
# **GCC/MENA versus global**: stronger preference for operators and higher spend among mega enterprises

Across all countries and vertical sectors, enterprises are eager to advance their digital transformation, making the necessary investments. High-level analysis of similarities and differences between MENA and the global picture reveals four findings.

## Enterprises in MENA have a stronger preference for operators

In MENA, 21% of enterprises see operators as a top-two preferred supplier for digital transformation – the highest ratio of any region and up from 18% in 2025. The smaller the enterprise, the greater the preference (24% among SMEs). The sectors showing the highest ratios are retail (28%), agriculture, forestry and fishing (26%), automotive and mobility (23%) and the public sector (23%).

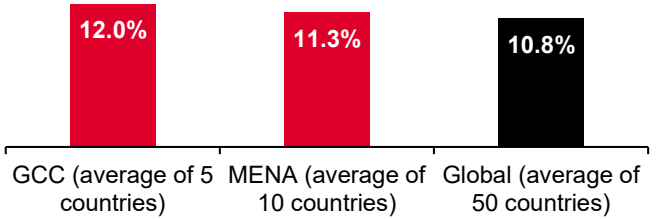
**Percentage of enterprises claiming operators are their preferred suppliers for digital transformation**




## Mega enterprises in MENA are spending more than global peers

While enterprise spend on digital transformation in MENA (9.3% of revenue through to 2032) is almost aligned with the global average (9.6%), mega enterprises (those with 10,000 employees or more) in the region plan to spend more than their global peers (12.0% versus 10.8% respectively). The GCC (12.0%) leads, with mega enterprises in Qatar (14.8%) and the UAE (13.1%) at the forefront.

**Spend on digital transformation as a percentage of revenues among mega enterprises, 2026–2032**




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026

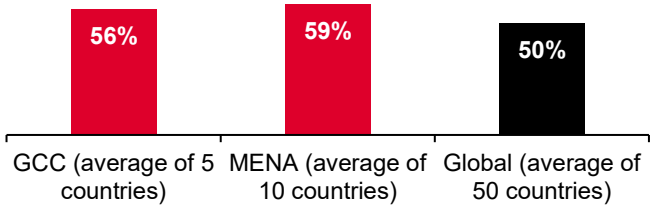
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# **GCC/MENA versus global**: more bullish on 5G private networks and feeling more supported by telecoms regulation

## Enterprises in MENA are more bullish on 5G private networks

Enterprises in MENA consider private wireless networks the second most important benefit of 5G, after enhanced security. In MENA, 59% of enterprises rate private networks as extremely important for digital transformation. The transportation, logistics and warehousing sector is the most bullish (65%), followed by retail (61%) and financial services (59%).

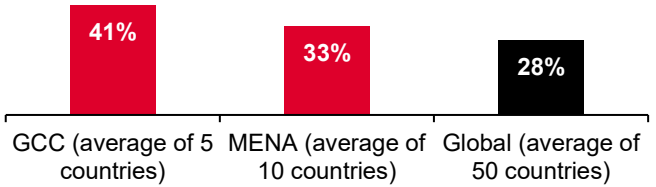
**Percentage of enterprises listing private wireless networks as an "extremely important" 5G benefit for digital transformation**




## Enterprises in MENA feel more supported by telecoms policy and regulations

A third of enterprises in MENA feel strongly supported by current telecoms policy and regulatory frameworks, rising to 41% in the GCC. By contrast, 27% of MENA enterprises claimed that, in the past 24 months, policy and regulatory requirements had a negative impact on their digital transformation projects (23% in the GCC). This suggests a mixed picture and that more policy work is needed.

**Percentage of enterprises feeling strongly supported by telecoms policy and regulations**




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026

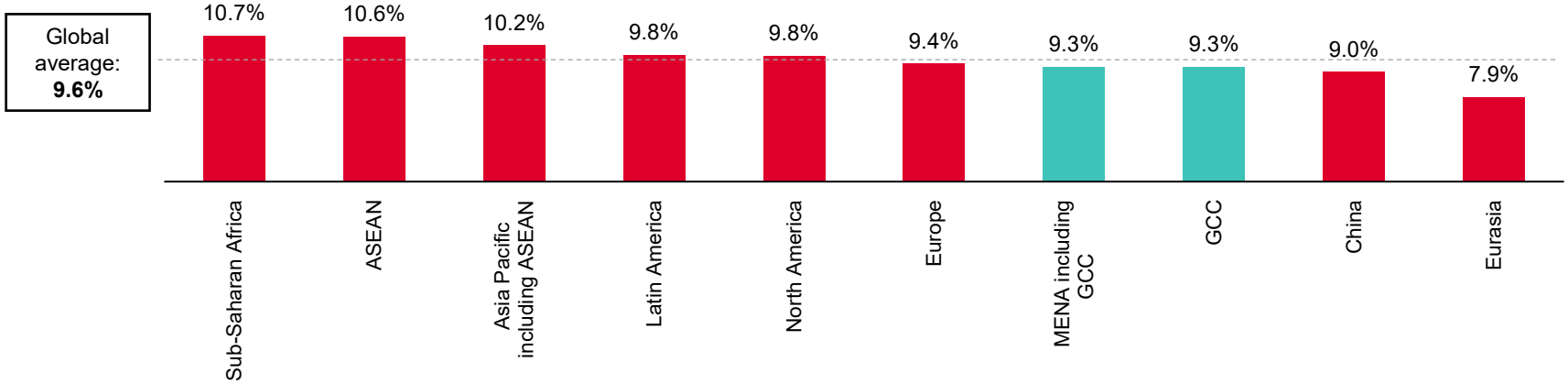
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# **Regional spend comparison**: figures for GCC and wider MENA region align with those of developed regions

**Two GCC countries among top spenders worldwide –** On a like-for-like basis (enterprise spend on digital transformation for 2026–2032 as a percentage of enterprise revenues), Sub-Saharan Africa (SSA) and ASEAN will be the top two spending regions. The underlying reasons may differ, however. SSA enterprises currently show gaps in the use of technologies enabling digital transformation. This likely explains why a bigger proportion of revenues will be allocated to digital transformation spend (a desire to address gaps). By contrast, ASEAN enterprises are seeking to accelerate digital transformation, pushing the use of modern digital infrastructure such as AI. The GCC and wider MENA region show levels of spend aligned with those of developed regions. The UAE (10.9%) and Saudi Arabia (10.7%) lead on spend and rank among the top 12 globally.

**Enterprise spend on digital transformation for 2026–2032 as a percentage of revenues**

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




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026

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# The B2B opportunity for operators: accelerating the transition from telco to tech-co

**B2B opportunity ranking** – Today, connectivity (mobile and fixed) is the largest source of B2B revenues for operators, but future growth is more likely to come from services beyond connectivity, spurring the transition from telco to tech-co. Across MENA, 21% of enterprises consider operators their first- or second-preferred supplier of digital transformation technologies/solutions. These enterprises represent a starting point for building profitable long-term business relationships. While all vertical sectors present B2B opportunities, the top three based on the GSMA Intelligence ranking are retail, the public sector, and manufacturing and industrial sectors (see next page).

**Ranking of vertical sectors based on propensity to engage with and purchase services from operators***

Aggregate figures across all countries surveyed. Base is enterprises undertaking digital transformation.

| | Overall ranking |
|---|---|
| Retail | 1st |
| Public sector | 2nd |
| Manufacturing and industrial sectors | 3rd |
| Financial services | 4th |
| Automotive and mobility | 5th |
| Agriculture, forestry and fishing | 6th |
| Transportation, logistics and warehousing | 7th |
| Healthcare | 8th |
| Utilities and energy | 9th |
| Media and entertainment | 10th |

For each vertical sector, the overall score informing the ranking is based on nine areas

| Connectivity | Beyond connectivity |
|---|---|
| Importance of 5G networks to digital transformation | Operators as preferred suppliers of digital transformation technologies/solutions |
| Importance of 5G capabilities and use cases | Usage gap on technologies beyond connectivity |
| Spend on connectivity (mobile and fixed) | Spend on technologies beyond connectivity |
| Willingness to pay extra for 6G | Use of AI services provided by operators |
| | Tech sovereignty (importance, willingness to pay extra and expectations of operators driving efforts) |

*GSMA Intelligence used data from the survey as an input to calculate the propensity.
The ranking is only based on survey data so does not represent an official ranking.

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

# The B2B opportunity for operators: the top three vertical sectors

**1st – Retail** ranked first in the overall ranking, being the leading sector on preference for operators as suppliers, and a runner-up on importance of 5G and 5G capabilities.

**2nd – Public sector** ranked second in the overall ranking, being a top-three sector in four of the nine areas, including preference for operators and spend beyond connectivity.

**3rd – Manufacturing and industrial sectors** ranked third in the overall ranking, being the leader on both importance of 5G and 6G appeal, and a runner-up on spend and tech sovereignty.

**Top three vertical sectors by area**

Connectivity
Beyond connectivity

| | 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 |
|---|---|---|---|---|---|---|---|---|---|---|
| Importance of 5G networks to digital transformation | 1st | 3rd | | | | | 2nd | | | |
| Importance of 5G capabilities and use cases | | 1st | | | | | 2nd | | | 3rd |
| Spend on connectivity (mobile and fixed) | 2nd | | 3rd | | 1st | | | | | |
| Willingness to pay extra for 6G | 1st | | | | 2nd | | | | | 3rd |
| Operators as preferred suppliers of digital transformation technologies/solutions | | | | | | | 1st | | 2nd | 3rd |
| Usage gap on technologies beyond connectivity | | | | | | 2nd | 3rd | 1st | | |
| Spend on technologies beyond connectivity | 2nd | | | | 1st | | | | | 3rd |
| Use of AI services provided by operators | 2nd | | 3rd | | | | | | 1st | |
| Tech sovereignty | 2nd | 1st | | | | | 3rd | | | |

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **Implications:** helping enterprises accelerate their digital transformation

| Operators | Other vendors of digital transformation technologies and solutions | Governments, policymakers and regulators |
|---|---|---|
| • **Leverage partnerships to strengthen B2B capabilities.** In MENA, telecoms operators are viewed more favourably as suppliers of digital transformation (versus telcos in other regions). However, expanding strategic partnerships with other suppliers remains key, especially as many enterprises still perceive operators as having weaker end-to-end digital transformation capabilities and less comprehensive portfolios than other companies such as hyperscalers. | • **Adjust B2B messaging depending on country.** In GCC countries, revenue considerations topped security and cost considerations as digital transformation objectives. By contrast, in MENA countries outside the GCC, security topped the list. While security is essential (best-in-class security should always be included as a foundation in B2B solutions), AI will capture more attention. This means suppliers increasingly need to make their digital transformation portfolios AI-ready. | • **Continue to treat enterprise digital transformation as a national priority.** Enterprises in MENA, particularly in the UAE and Saudi Arabia, are planning large investments in digital transformation through to 2032, but they also expect a ~200% RoI. Developing a favourable tech and policy environment that can foster innovation and investments while addressing key barriers to digital transformation deployment is key. |
| • **Turn trust into B2B opportunities.** As well as pushing adoption of 5G, IoT and AI, operators in MENA should increasingly target opportunities in tech sovereignty. One in six enterprises think operators should be the main companies driving the efforts of developing a tech sovereignty environment in the region. This suggests telcos are seen as trusted local partners. | • **Target the tech orchestrator role.** Tech integration is a top-two digital transformation deployment challenge faced by enterprises in MENA. As integration becomes more complex, the role of the tech orchestrator will become even more important (and demanded), providing new opportunities to build long-term customer relationships. | • **Action needed across many fronts.** Almost 60% of enterprises in MENA identified AI, cybersecurity and connectivity networks as the key areas needing policymakers' focus in the next three years. These should be priorities for governments, as they are functional to fully realising the benefits of digital transformation. |

# **Digital transformation of industries in MENA**: a snapshot of the leading vertical sectors by topic

| Topic | Description | Leading vertical sectors |
|---|---|---|
| **Spend** | Highest spend on digital transformation as a percentage of revenues for 2026–2032 | 1) Manufacturing and industrial sectors<br>2) Financial services<br>3) Retail |
| **AI** | Highest advanced use of AI technology (generative AI and wider AI) | 1) Agriculture, forestry and fishing<br>2) Manufacturing and industrial sectors<br>3) Transportation, logistics and warehousing |
| **5G** | Highest expectation that 5G is important for digital transformation | 1) Manufacturing and industrial sectors<br>2) Healthcare<br>3) Automotive and mobility |
| **Cloud** | Highest advanced use of cloud technology | 1) Manufacturing and industrial sectors<br>2) Financial services<br>3) Public sector |
| **Cybersecurity** | Highest advanced use of cybersecurity technology | 1) Financial services<br>2) Automotive and mobility<br>3) Transportation, logistics and warehousing |
| **Deployment challenges** | Highest score on challenges highlighted | 1) Transportation, logistics and warehousing<br>2) Healthcare<br>3) Manufacturing |
| **Policy and regulation** | Highest score on current telecoms policy and regulatory frameworks/rules hindering digital transformation | 1) Media and entertainment<br>2) Utilities and energy<br>3) Automotive and mobility |

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# Digital transformation overall
# Key takeaways

1

**A range of objectives drive digital transformation spend.** While cybersecurity is the lead objective in most other regions, enterprises in MENA place a similarly high level of importance on competitive positioning and revenue growth, with all three rated "very important" by more than two thirds of enterprises. Priorities differ within the region: competitive positioning and revenue growth rank ahead of security in the GCC, while security leads in non-GCC countries. Four in 10 MENA enterprises cite implementation costs and the integration of new technologies with legacy systems as digital transformation deployment challenges. Tech integration, which ranked fourth in the 2025 study, rose to second in 2026. As technology integration becomes more complex, enterprise demand for tech orchestration is likely to grow, creating opportunities for suppliers, including operators.

2

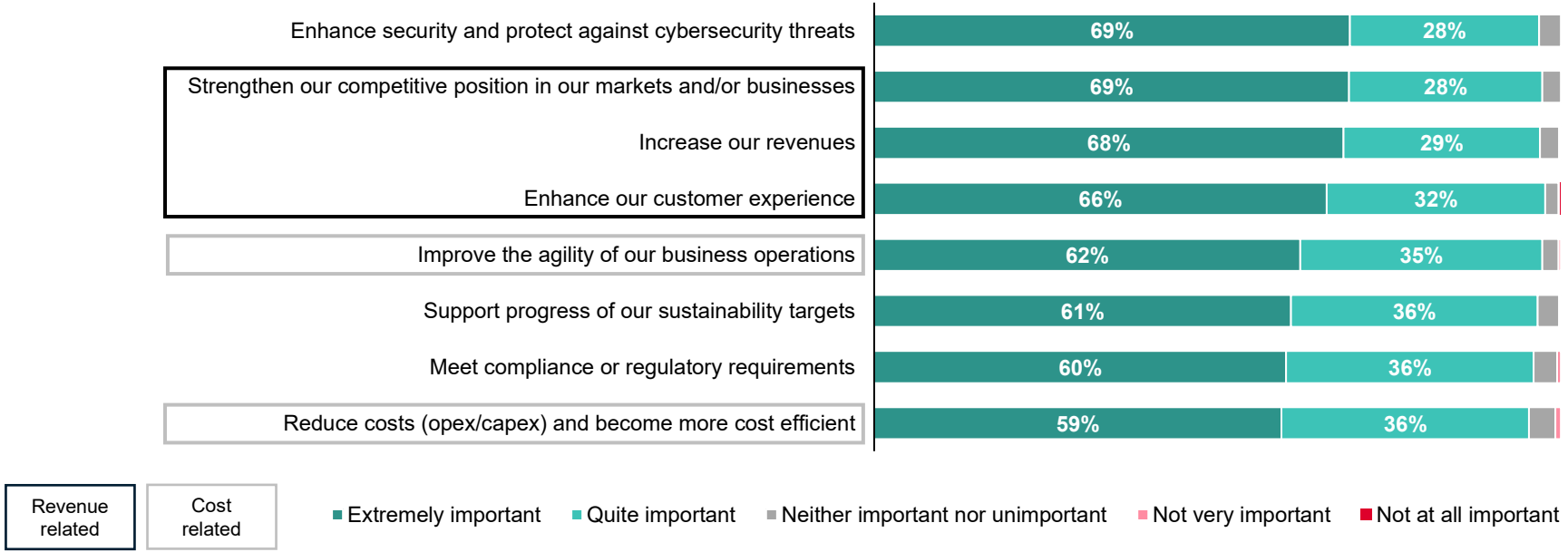
**AI and 5G lead digital transformation spend.** MENA enterprises expect to spend 9.3% of revenue on digital transformation through to 2032, almost in line with the global average (9.6%). This masks significant variation among countries. The UAE (10.9%) and Saudi Arabia (10.7%) lead and are among the highest spenders globally, while Kuwait (7.5%) and Tunisia (7.6%) are among the lowest. Mega enterprises (with 10,000 employees or more) in the region plan to spend more than their global peers (12.0% versus 10.8% respectively). The GCC (12.0%) leads, with mega enterprises in Qatar (14.8%) and the UAE (13.1%) at the forefront. AI and 5G (connectivity, devices and custom networks) are the leading spend priorities, together accounting for 32% of digital transformation spend. IoT accounts for a further 13%, rising to 14–15% in Tunisia, Kuwait, the UAE and Türkiye.

3

**Operators continue to gain ground.** Hyperscalers remain the preferred digital transformation suppliers, leading in eight out of 10 vertical sectors and building on their 2025 position. Systems integrators have moved into third place, behind telecoms network/equipment vendors, while enterprise software providers have lost some ground. Operators continue to make gains. In MENA, 21% of enterprises see operators as a top-two preferred supplier for digital transformation – the highest ratio of any region and up from 18% in 2025. The smaller the enterprise, the higher the preference (24% among SMEs). The sectors showing the highest ratios are retail (28%), agriculture, forestry and fishing (26%), automotive and mobility (23%) and the public sector (23%). The biggest challenges facing operators as they seek to expand their share of digital transformation spend are perceived gaps in end-to-end capabilities (e.g. strategy, planning and implementation), more limited expertise in sustainable solutions, and less comprehensive portfolios than other companies such as hyperscalers.

# **Digital transformation objectives:** enhanced security and revenue-related objectives top the list

**Digital transformation objectives**
How important are the following objectives to your company's digital transformation initiatives?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.

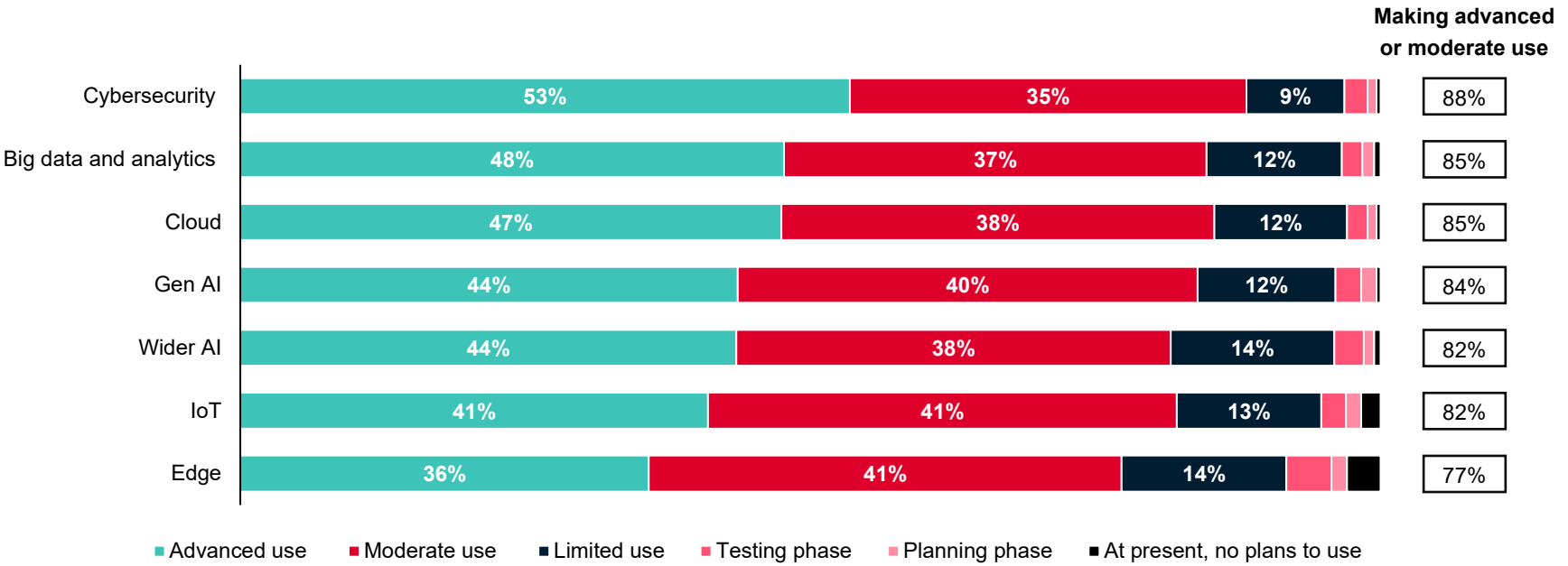



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **Enabling tech:** 40–50% of enterprises in MENA make advanced use of most technologies; cybersecurity leads

**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 all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.

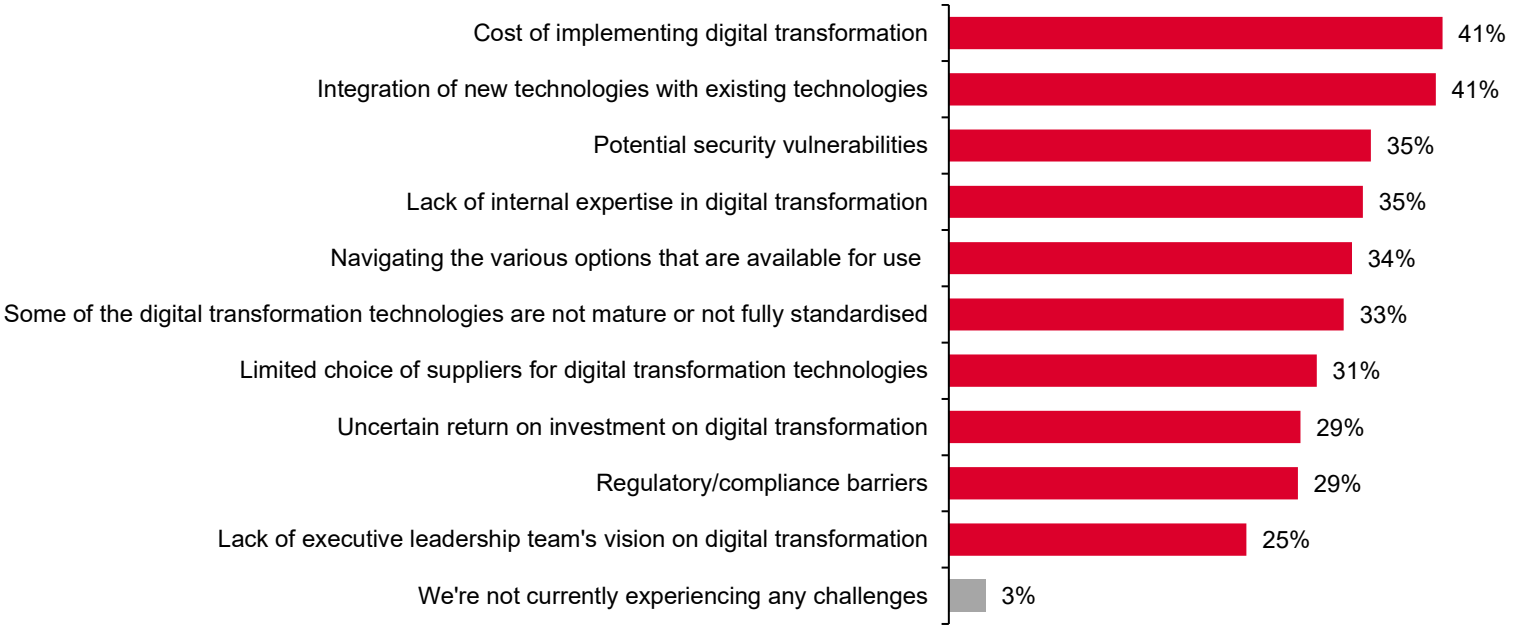



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **Challenges:** cost of implementation and tech integration form the top two; only 3% of enterprises face no challenges

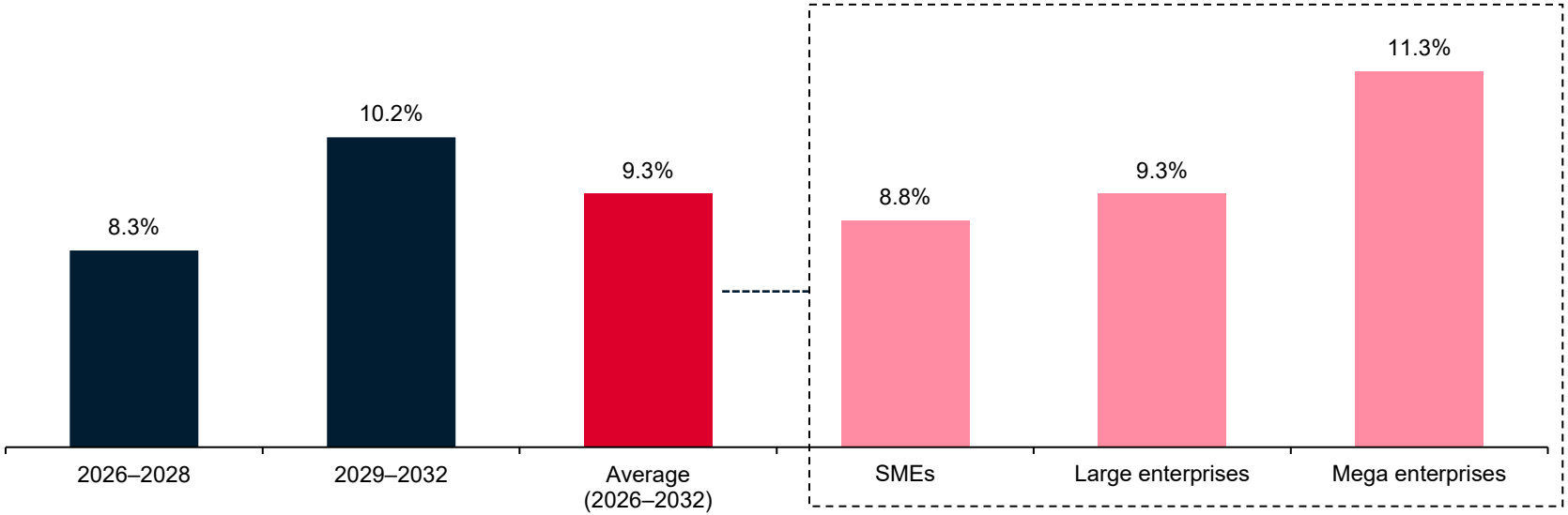
**Digital transformation deployment challenges**
What are the challenges that your company currently faces when implementing digital transformation initiatives?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of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




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

# **Spend on digital transformation**: 9% of revenues through to 2032; the bigger the enterprise, the higher the spend

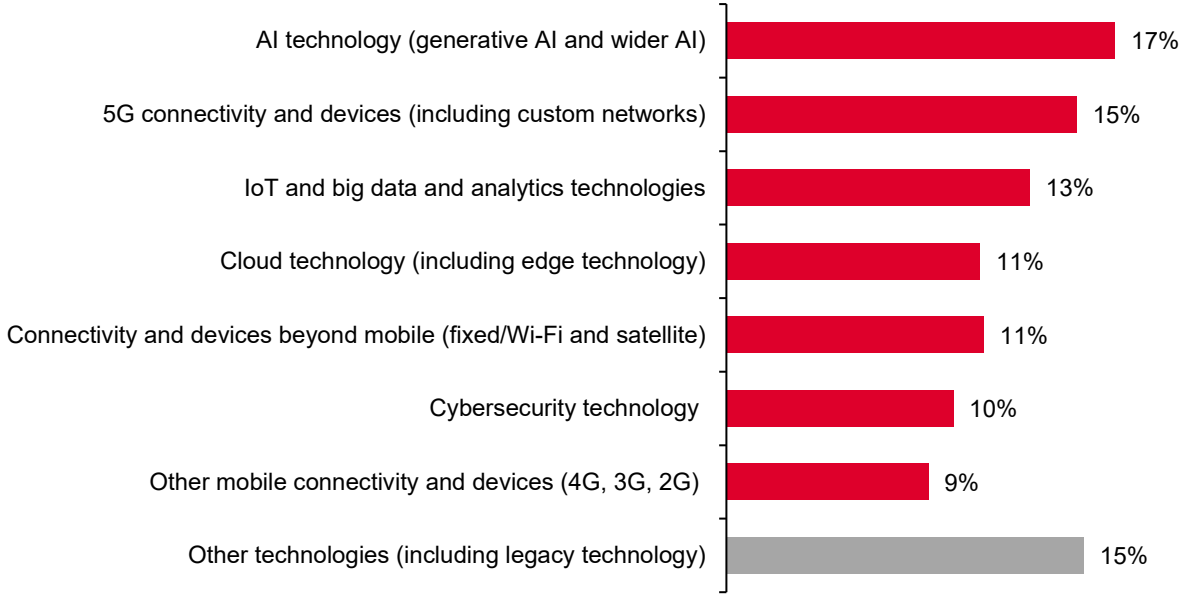
**Spend on digital transformation as a percentage of revenues**
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Figures represent weighted average.




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

# **Spend on digital transformation by technology**: AI and 5G are the leading areas, followed by IoT and data analytics

**Spend on digital transformation by technology as a percentage of total spend on digital transformation, 2026–2032**
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Figures represent the contribution of each technology to the total spend on digital transformation (based on GSMA Intelligence analysis of survey data). Percentages may not add up due to rounding.



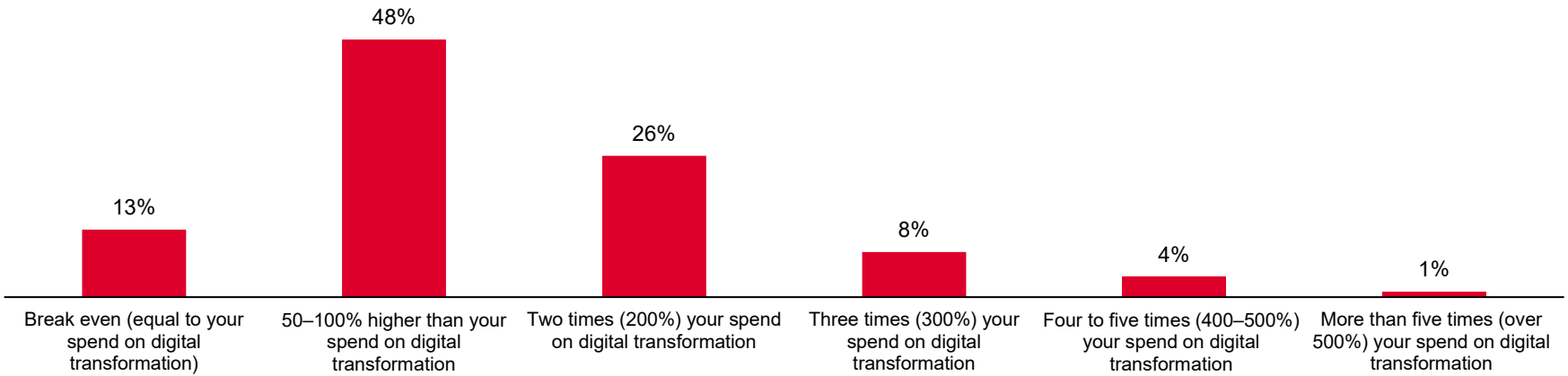

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **Expected RoI:** seven in eight enterprises expect to see a return on spend, with an average RoI of just under 200%

**Expected RoI on digital transformation spending**
What type of return would you expect from your company's spend on digital transformation?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.
Percentages may not add up due to rounding.

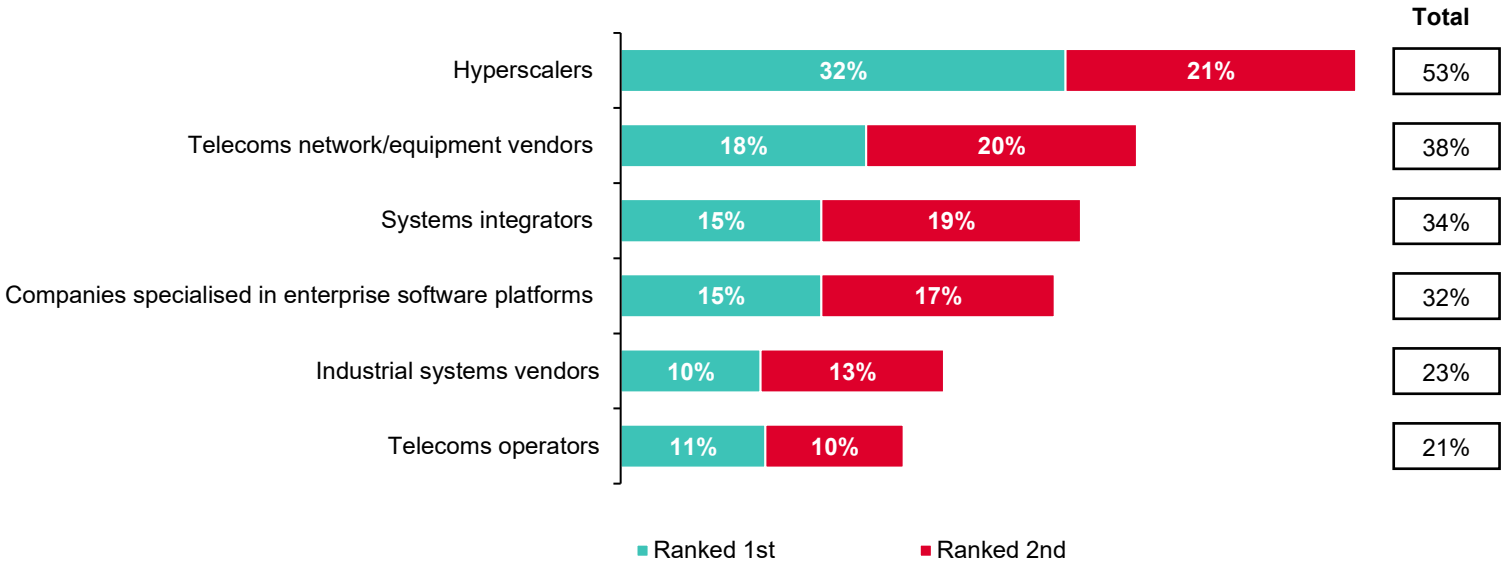
Average RoI expected on digital transformation spend: **197%**




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

# **Supplier choice:** hyperscalers lead a diverse field of suppliers; operators ranked first or second by one in five

**Preferred suppliers of digital transformation technologies**
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 first- and second-preferred supplier?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

# **Supplier choice by sector**: supplier market is competitive; some sectors show up to 28% preference for operators

**Top-three preferred suppliers of digital transformation technologies by vertical sector and telecoms operator score (%)**
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 first- and second-preferred supplier?
Aggregate figures across all countries surveyed. Base is enterprises undertaking digital transformation.

| | 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 |
|---|---|---|---|---|---|---|---|---|---|---|
| Hyperscalers | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 1 | 2 | 2 |
| Telecoms network/equipment vendors | | 2 | 2 | 2 | 3 | 2 | 3 | 2 | | 1 |
| Systems integrators | 3 | | 3 | 3 | | 3 | | 3 | 1 | 3 |
| Companies specialised in enterprise software platforms | 2 | 3 | | | 2 | | 2 | | 3 | |
| **Percentage of enterprises that selected telecoms operators (sum of ranked 1st and 2nd)** | 20% | 18% | 23% | 19% | 18% | 19% | 28% | 17% | 26% | 23% |

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **Reasons operators are not preferred partners**: lagging in end-to-end support and portfolio, and sustainability expertise

**Reasons for telecoms operators not being a preferred supplier of digital transformation technologies and solutions**
Why are telecoms operators not a preferred supplier of digital transformation technologies and solutions?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation not ranking telecoms operators as a top-two preferred supplier of digital transformation technologies and solutions. Percentage of respondents. Respondents could select up to four options.




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# 5G and AI
# Key takeaways

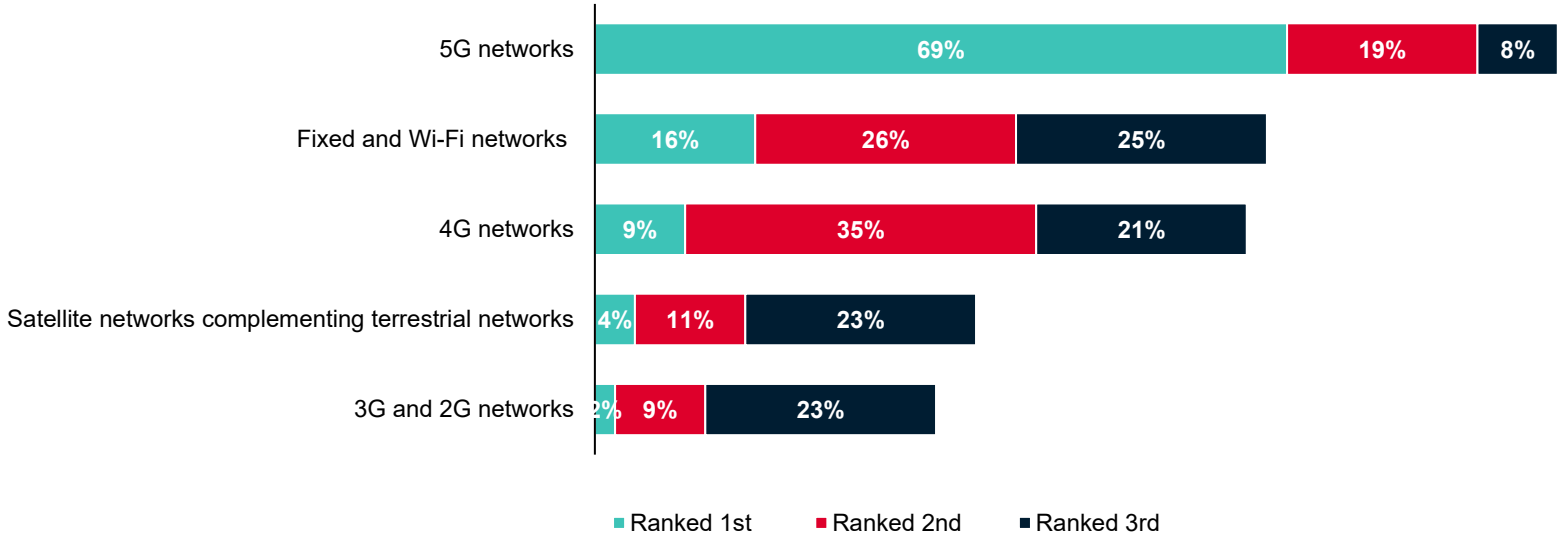
1 **5G is central to digital transformation.** More than two thirds (69%) of MENA enterprises identify 5G as the most important connectivity network for digital transformation – more than four times the share selecting fixed networks. Its importance is particularly high in vertical sectors requiring device mobility such as manufacturing and industrial sectors, healthcare, transportation, logistics and warehousing, and automotive and mobility. Saudi Arabia and Türkiye lead on the importance of 5G. Despite 5G's commanding lead, fixed networks have gained importance since 2025, overtaking 4G as the region's second-most important connectivity technology. Enhanced security is seen as the leading benefit of 5G, followed by private wireless networks. MENA is the only region where private networks rank this highly. In the region, 59% of enterprises rate private networks as extremely important for digital transformation. The transportation, logistics and warehousing sector is the most bullish (65%), followed by retail (61%) and financial services (59%).

2 **AI is making gains.** In MENA, 44% of enterprises are making advanced use of AI, up two percentage points from 2025, with the largest gains coming from generative AI. Among enterprises making advanced use of AI, six in 10 report clear benefits across the business, while another 32% report benefits in some business units. Experiences vary considerably across the region: around three quarters of advanced AI users in Saudi Arabia, Türkiye and Egypt report clear benefits, versus around a third in Tunisia, Qatar and Kuwait. Clear benefits are most widely reported in manufacturing and industrial sectors and retail. Looking ahead, enterprises expect AI to deliver benefits across a range of use cases, led by cost reduction and enhanced security.

3 **Enterprises take a multi-provider approach to AI.** While large technology providers (e.g. Microsoft, Google, Amazon and IBM) are almost ubiquitous, with 92% of enterprises in MENA using them for AI, most organisations rely on a mix of providers to meet their different AI needs, including operators. The top three vertical sectors using operators for AI services include agriculture, fishing and forestry, manufacturing and industrial sectors, and the public sector. Operator use for AI is also strongest in Kuwait, Egypt, Türkiye and Saudi Arabia. Operators are viewed as credible AI partners for cybersecurity, with 53% of enterprises using operator AI services willing to consider operator-delivered AI cybersecurity solutions. Physical AI (e.g. humanoids and robotics) and GPU-as-a-service (GPUaaS) and access to AI-ready data centres are seen as less appealing operator AI services (only 27% of MENA enterprises view each as appealing).

# **Connectivity and networks:** 5G the most important; fixed and 4G tied for second; satellite making inroads

**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 for 2026–2028.
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.

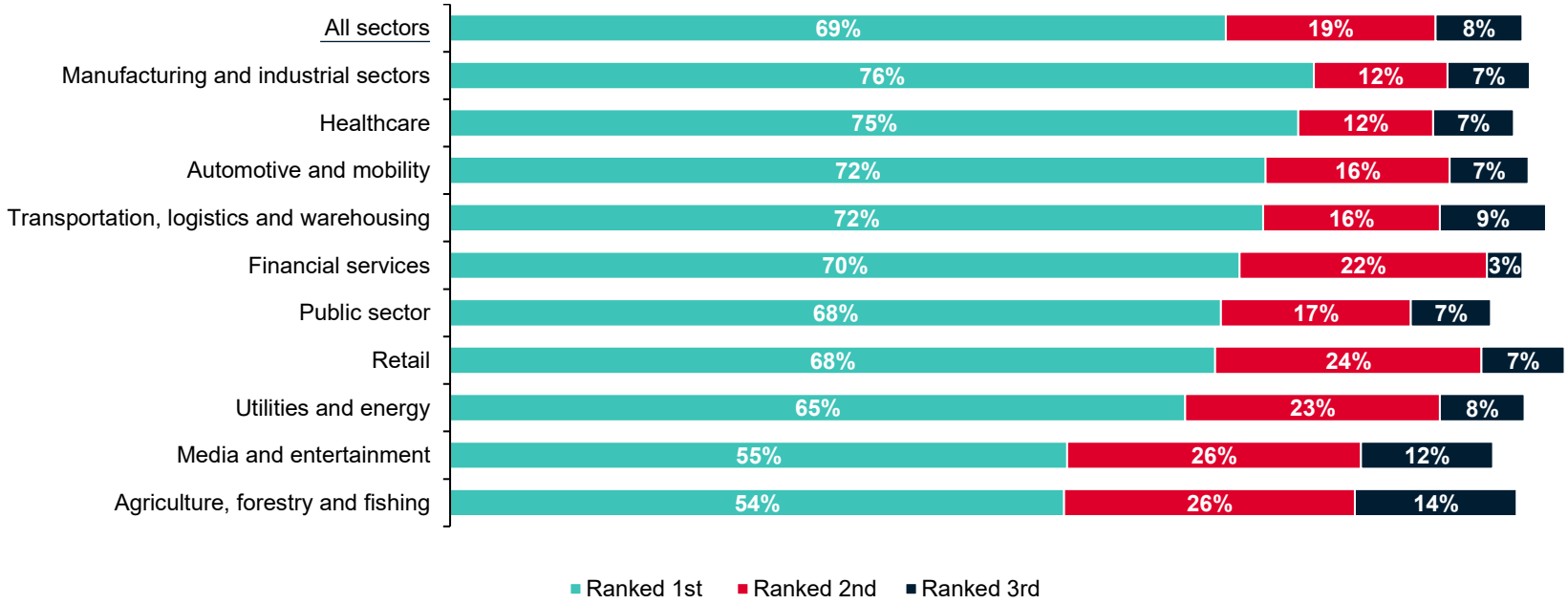



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **5G connectivity and networks:** 5G deemed most important across all sectors; manufacturing and healthcare lead

**5G connectivity and networks: importance to the success of digital transformation by vertical sector**
Aggregate figures across all countries surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.

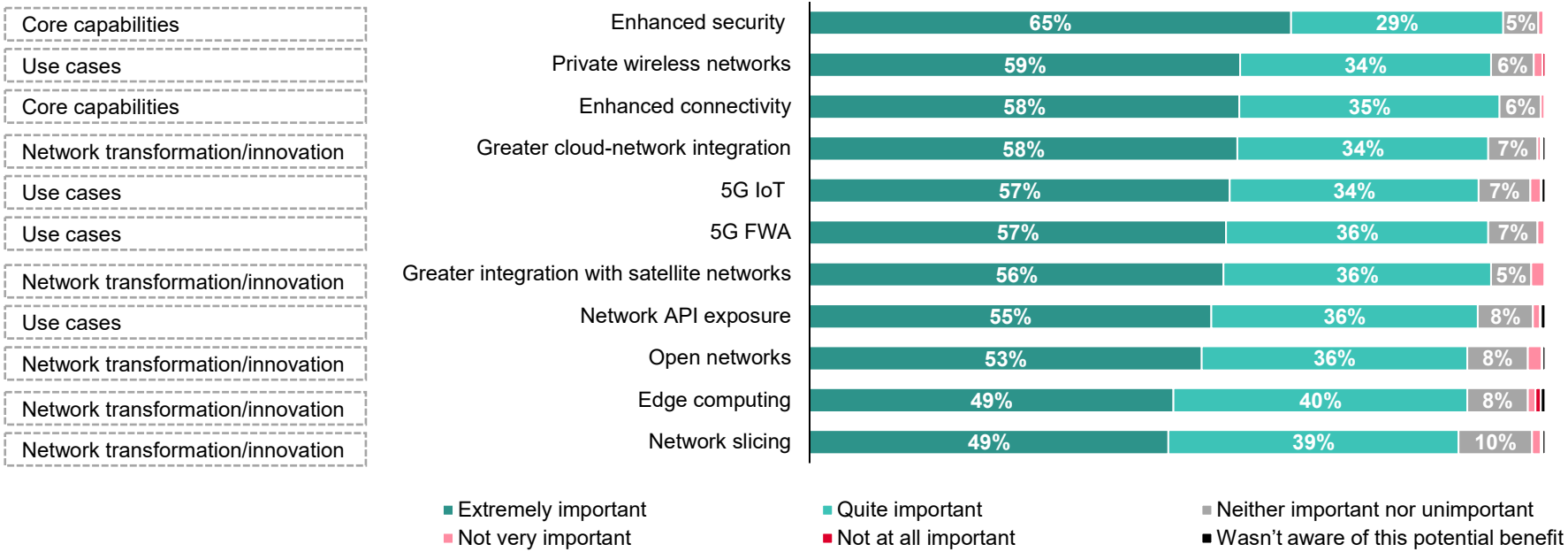



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **5G benefits:** stronger security leads; private networks, enhanced connectivity and cloud-network integration follow

**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 all countries and vertical sectors surveyed. Base is enterprises that rated 5G as a top-three network technology important to the success of their digital transformation. Percentage of respondents.



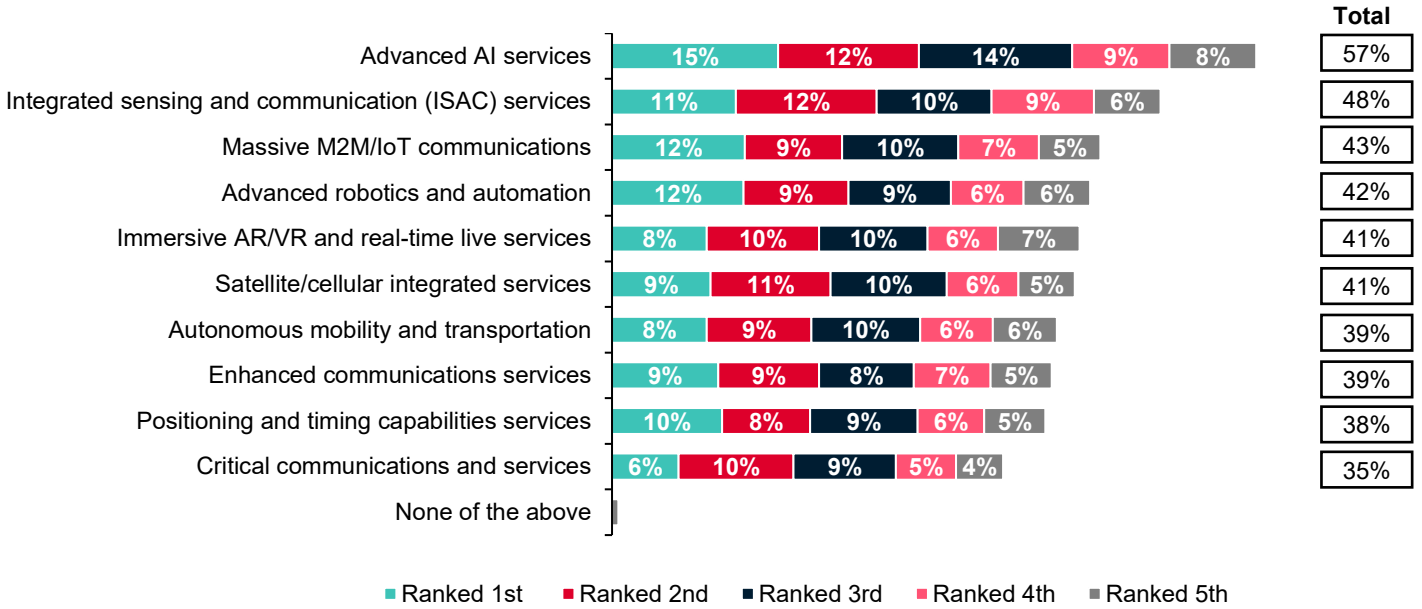

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **6G**: advanced AI and ISAC are the most appealing use cases; average extra pay for 6G is 13.9% if it fully delivers

**Importance of potential 6G use cases**

Which of the following potential 6G use cases would be appealing to your company's digital transformation?
If your company was 100% sure that 6G would fully deliver the use cases that you rated as most appealing for your company's digital transformation, how much extra, if anything, would you be willing to pay for 6G compared to what your company is currently paying for other network technologies (e.g. 4G, 5G)?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.
Percentages may not add up due to rounding.




Average extra pay for 6G:
**13.9%**

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **AI future impact**: big impact expected across all 12 uses, with cost efficiency and security leading

**Expectations of AI business impact: ranking**
Rate the following potential uses of AI technology (generative AI and/or wider AI) in terms of how they might impact your business.
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises that are already using or testing/planning to use genAI and/or wider AI technology.

| | |
|---|---|
| Using AI to reduce costs or become more cost efficient on business operations and processes | 1st |
| Using AI to enhance our security systems and protect against cybersecurity threats | 2nd |
| Using AI to enhance our marketing decisions and campaigns | 3rd |
| Using AI to enhance our sales and commercial decisions | 4th |
| Using AI to innovate our existing portfolio of services, products and capabilities | 5th |
| Using AI to enhance worker productivity | 6th |
| Using AI to better manage the technologies that we use or sell | 7th |
| Using AI to improve the monetisation of data assets | 8th |
| Using AI to launch new services, products or capabilities, creating new revenue streams | 9th |
| Using AI for the automation of customer-facing activities | 10th |
| Using AI to inform and enhance our commercial pricing decisions | 11th |
| Using AI to better review our business opportunities and mitigate our business risks, and for executive leadership decision-making processes | 12th |

Security

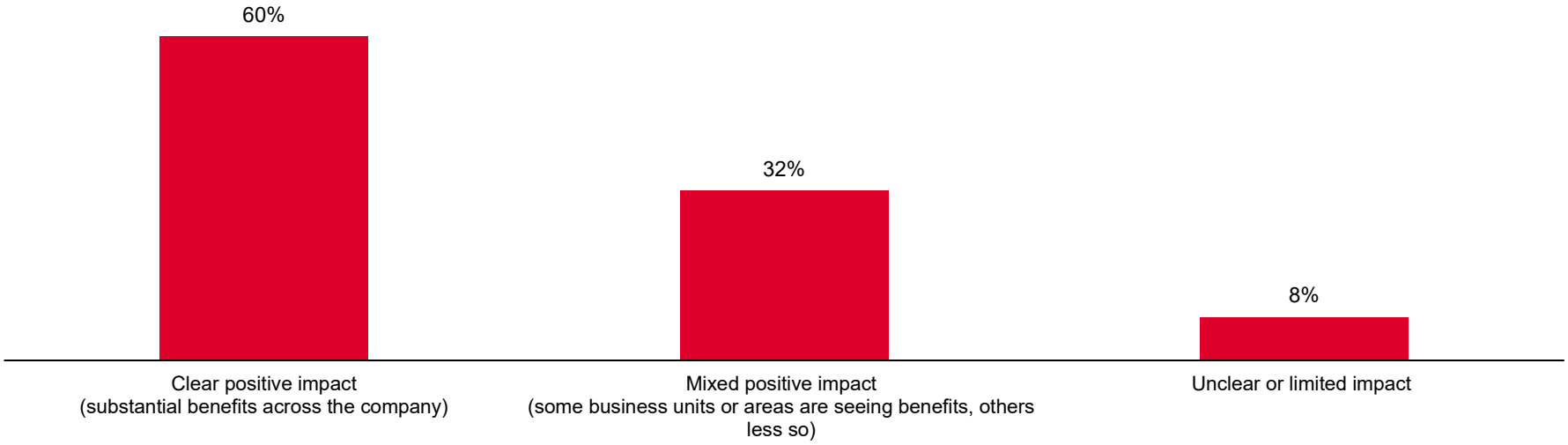
Productivity and efficiency gains

Business development and commercial/marketing decisions

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

# **AI impact so far**: among enterprises making advanced use of AI, 60% report a clear positive impact across the business

**AI impact so far**
Thinking about your company's investment in AI technologies and the benefits/costs, how would you describe the impact of AI on your business so far? Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises that are already making 'advanced use' of genAI and/or wider AI technology. Percentage of respondents. Percentages may not add up due to rounding.

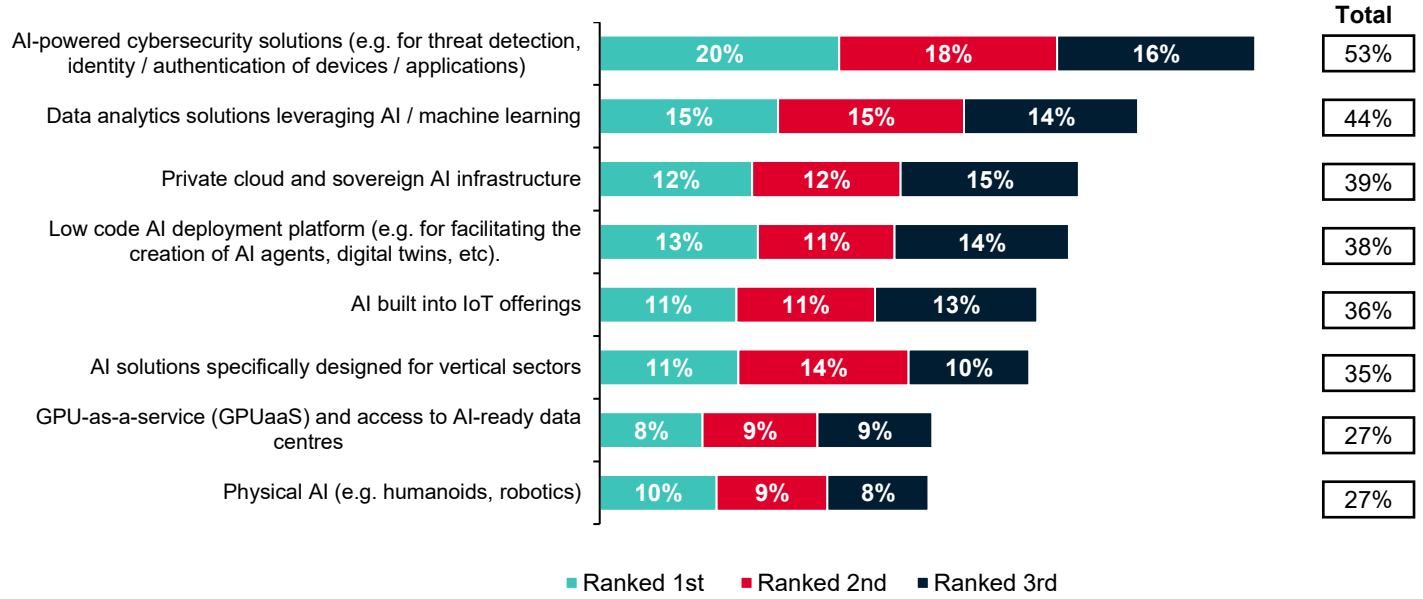



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

# **Appeal of operator AI services:** AI-powered cybersecurity most appealing, followed by data analytics/machine learning

**Appeal of AI services provided by telecoms operators**

Which of the following AI services provided by telecoms operators would be most appealing to your company's AI transformation plans?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises that are using AI services provided by telecoms operators (genAI and/or wider AI). Percentage of respondents. Percentages may not add up due to rounding.




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

# Tech sovereignty
# Key takeaways

1 **Significant correlation between importance and willingness to pay extra.** For most enterprises in MENA, understanding the possible areas of tech sovereignty* requirements and defining an implementation strategy are still work in progress. Nevertheless, there is a solid consensus among enterprises that tech sovereignty is “very important” to ensure the safety, security and control of critical digital infrastructure, technology, data and digital systems. This holds true for all the eight technologies analysed (cybersecurity, data, networks and connectivity, AI, cloud, hardware, digital financial services and digital identity). Unsurprisingly, there is a significant positive correlation between importance of tech sovereignty and willingness to pay extra for sovereign tech (the bigger the former, the higher the latter). For instance, the financial services and manufacturing and industrial sectors are among the top-three verticals both in terms of importance attached to tech sovereignty and willingness to pay extra for sovereign tech.

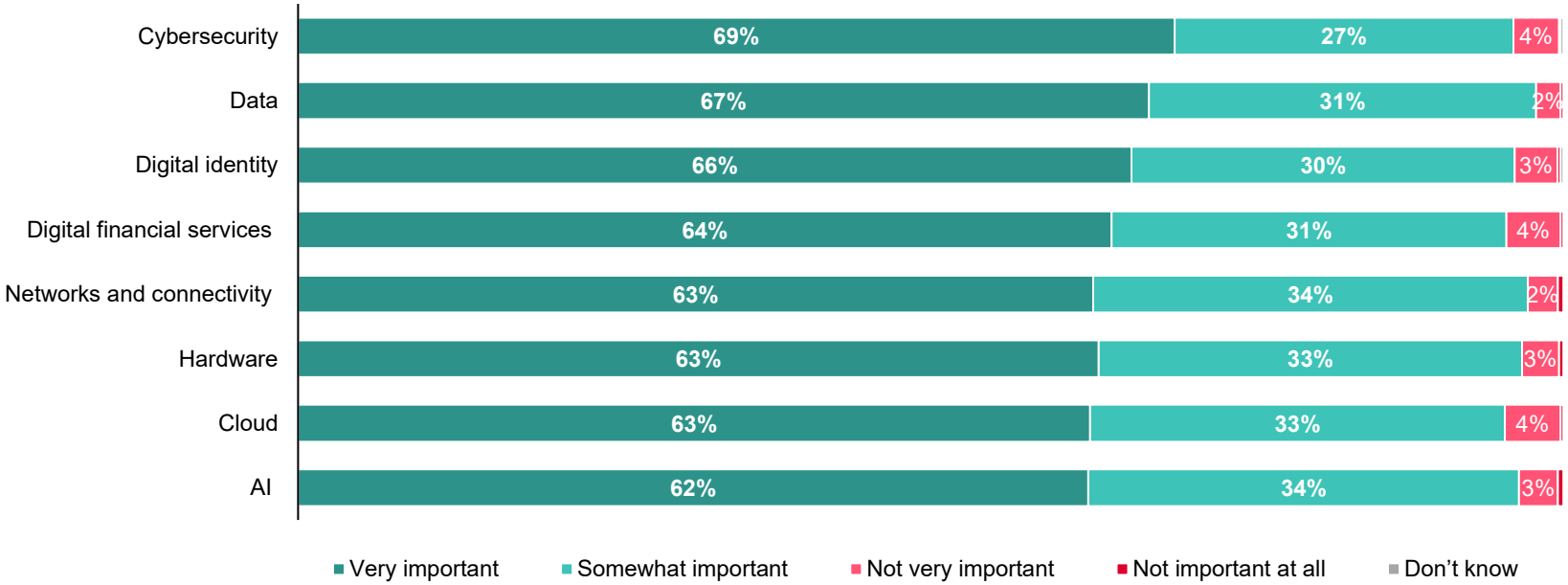
2 **Enterprises are willing to pay a premium for tech that is sovereign.** On average across the 10 vertical sectors surveyed, enterprises in MENA are willing to pay 13.2% extra for sovereign tech (13.5% in the case of the GCC), slightly above the global average of 12.9%. Premiums range from 12.5% for sovereign hardware to 14.2% for sovereign cybersecurity. There are important variations in the region, with enterprises in the UAE, Saudi Arabia and Egypt willing to pay an extra 15% for sovereign tech, compared to 11% extra in Tunisia and Iraq. Mega enterprises (those with 10,000 employees or more) attach the most value to sovereign tech, willing to pay almost 17% extra, versus 12–13% in the case of SMEs and large enterprises.

3 **A collaborative approach to tech sovereignty needed.** Enterprises in MENA have yet to reach a consensus on which private-sector organisations should drive the efforts of developing a tech sovereignty environment alongside governments, with support spread almost evenly between suppliers of AI infrastructure, cybersecurity infrastructure and telecoms operators. This highlights a need for collaboration and combined efforts across the ICT ecosystem. Operators rank third overall and are particularly well positioned in Türkiye and Morocco where they rank first, and Egypt where they rank just behind cybersecurity infrastructure suppliers. Telecoms operators are also perceived to be the most trusted to drive tech sovereignty efforts forward by SMEs and by enterprises in the transportation, logistics and warehousing, retail and manufacturing and industrial sector verticals.

* In the survey, the following definition of tech sovereignty was used: the ability of a country or group of countries (e.g. the European Union or any other similar cross-country institutions) to produce, control and protect its own critical communication networks, digital infrastructure, technology, data and digital systems without being dependent on foreign suppliers (whether companies or governments).

# **Tech sovereignty importance**: very important across all technologies; cybersecurity the most critical area

**Importance of tech sovereignty**
How important is technological sovereignty to ensure the safety, security and control of the critical digital infrastructure, technology, data and digital systems within your primary country of operations?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.

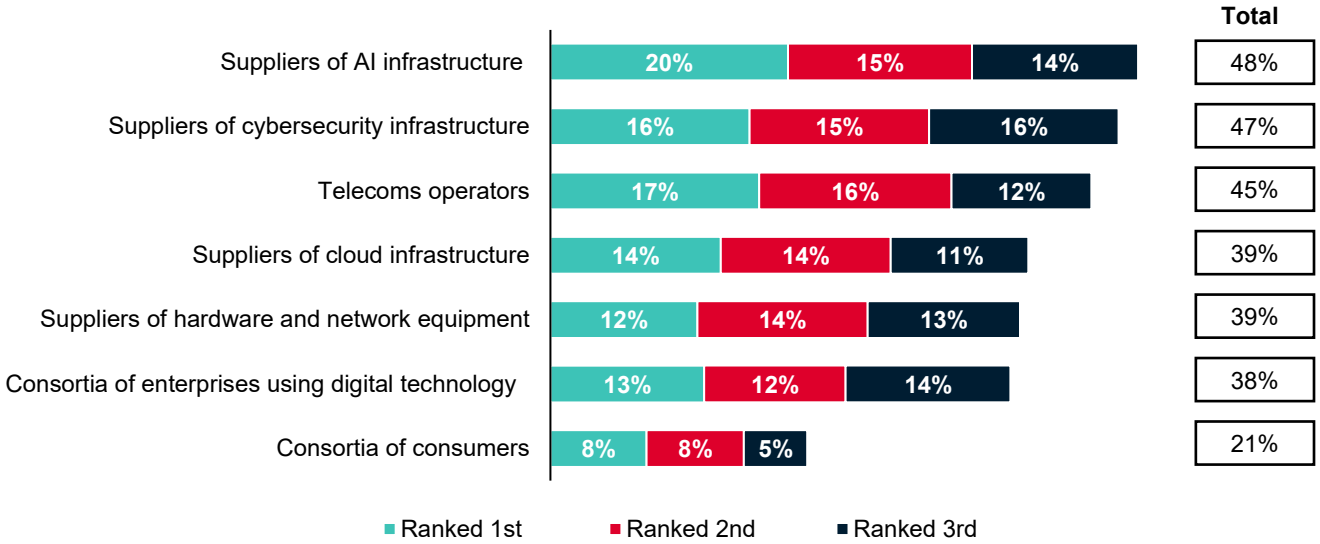



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **Tech sovereignty efforts**: beyond governments, suppliers of AI and cybersecurity and operators should drive efforts

**Companies that should drive tech sovereignty efforts**
Beyond governments, who do you think should drive the efforts of developing a technological sovereignty environment within your primary country of operations? Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents. Percentages may not add up due to rounding.

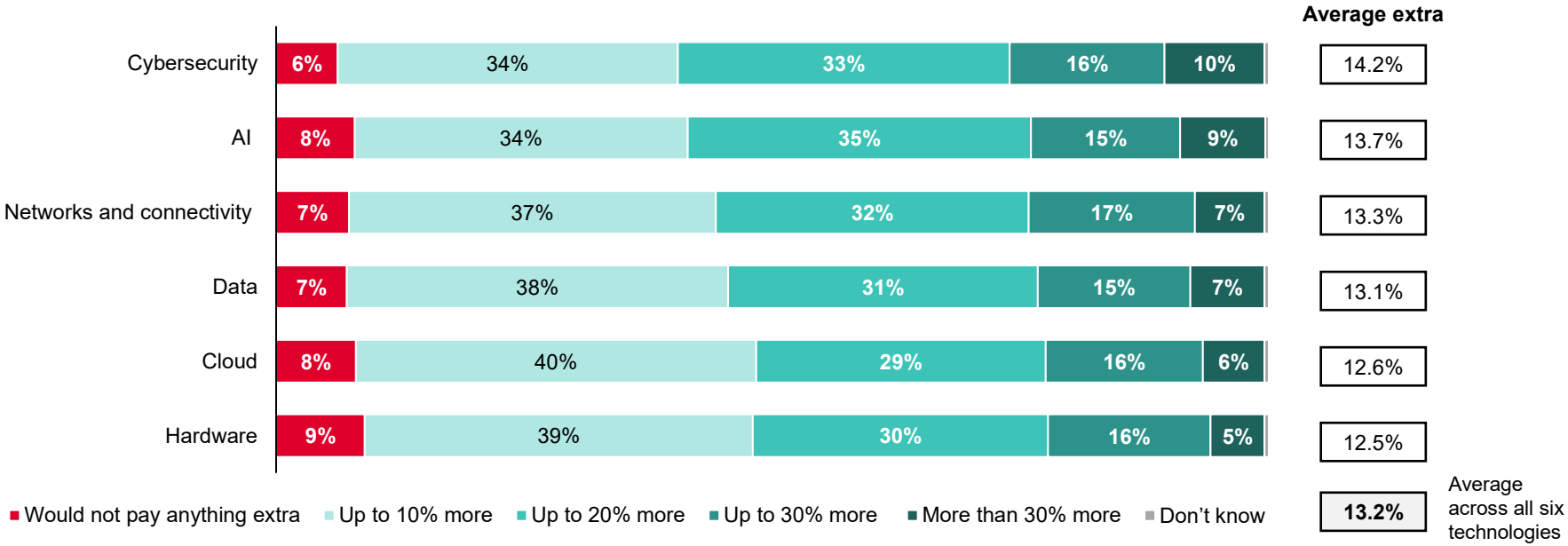



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **Willingness to pay:** enterprises willing to pay 13.2% extra for sovereign tech, up to 14.2% for sovereign cybersecurity

**Willingness to pay extra for sovereign tech**
Thinking about your primary country of operations, how much extra, if anything, would your company be willing to pay if your company knew that the technology is sovereign?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents. Percentages may not add up due to rounding.




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

GSMA Intelligence

# Telecoms policy and regulation
## Key takeaways

1

**Scope for more robust support from telecoms policy and regulation.** Although 93% of enterprises in MENA find existing telecoms policies and regulations either very clear (54%) or somewhat clear (39%), a smaller share (61%) believe current frameworks/rules support the ability to pursue digital transformation and/or commercialise connected products or services. Conversely, 28% of enterprises in MENA feel current frameworks/rules are hindering their digital transformation projects, with the ratio rising above 40% in Tunisia and Kuwait. Among the 28% of enterprises claiming that current telecoms policies and regulations hinder digital transformation, the to-three challenges observed include licensing of telecoms products and services (e.g. 4G/5G including private networks, and equipment), compliance with data protection, privacy and digital identity regulations, and alignment with sector-specific rules (e.g. rules specific to the enterprise's own sector).

2

**Variations exist within the region.** Although a third of enterprises in MENA feel strongly supported, nearly as many enterprises (27%) claimed that, in the past 24 months, telecoms policy and regulatory requirements had a negative impact on their digital transformation projects. In the GCC, enterprises feel more supported, with Saudi Arabia and the UAE reporting among the strongest support levels globally. Outside the GCC, enterprises report the highest rate of disruption from telecoms policy and regulation. Among those negatively impacted in the region, over half have changed technology choices (e.g. changing tech suppliers or avoiding certain networks/solutions) or reduced their expected return on investment.

3

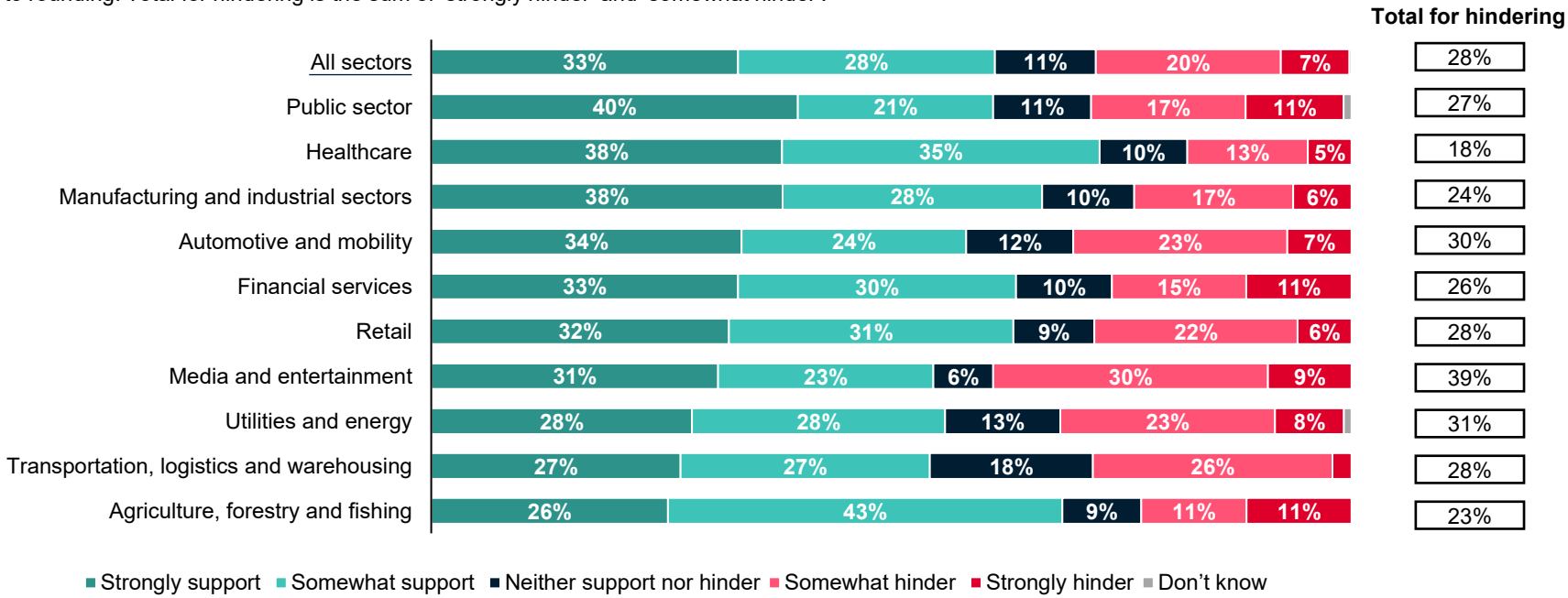
**Enterprises seek enabling policies for faster, more agile digital transformation.** Enterprises in MENA think that accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud, and 6G in the future) should be the main telecoms policy goal for advancing digital transformation in the region. For countries in the GCC (especially Qatar, UAE and Kuwait), enterprises think that enhancing regulatory agility should be the leading goal. In terms of priorities for the next three years, more than half of enterprises in MENA identified AI (e.g. pushing tech developments, better governance and expanding enterprise access to AI), cybersecurity (e.g. building secure, resilient and trusted systems to ensure digital safety, helping tackle cyberthreats, fraud and scams) and connectivity networks (e.g. accelerating the deployment of 5G/6G) as the key areas requiring policymakers' focus.

# **Support from telecoms policy and regulation:** more than 60% of enterprises feel supported; 28% feel hindered

**Impact of current telecoms policy and regulatory frameworks/rules by vertical sector**

To what extent do the current telecoms policy and regulatory frameworks and rules in your primary country of operations support or hinder your ability to pursue digital transformation and/or commercialise connected products/services?

Aggregate figures across all countries surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents. Percentages may not add up due to rounding. Total for hindering is the sum of 'strongly hinder' and 'somewhat hinder'.

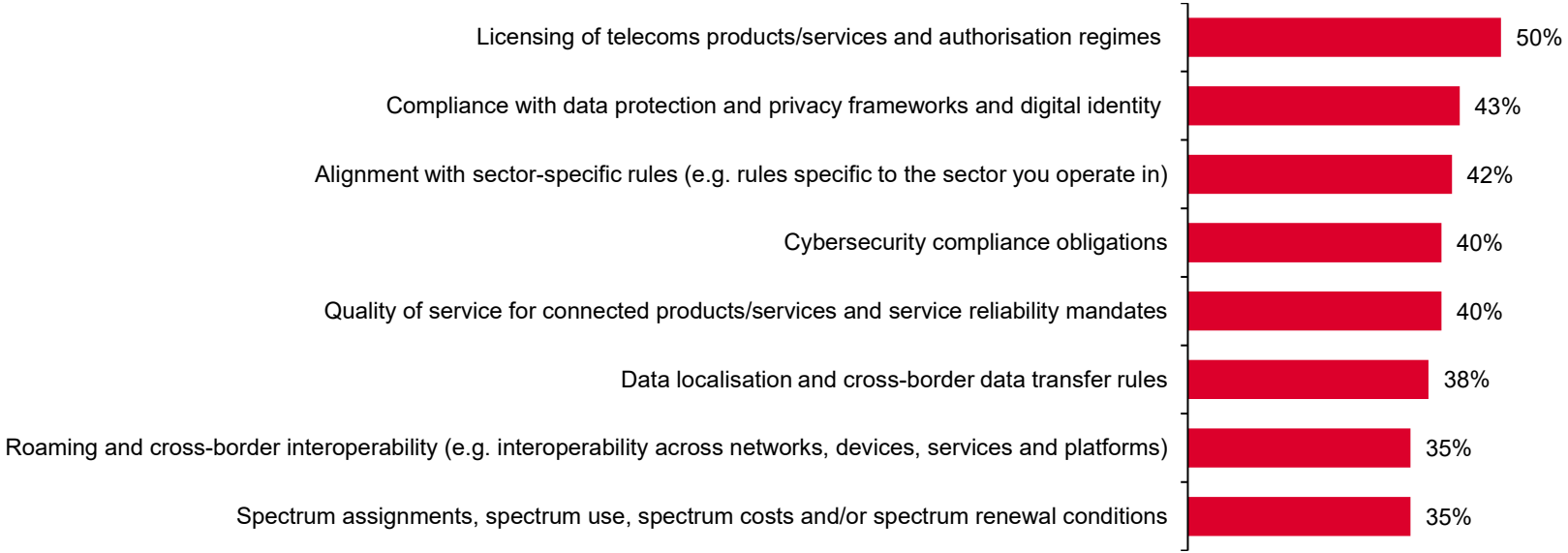



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **Areas hindering digital transformation**: licensing, data protection compliance and sector-specific alignment top list

**Areas of telecoms policy and regulatory requirements hindering digital transformation**
Which areas of telecoms policy and regulatory requirements most hinder your company's digital transformation efforts and/or commercialisation of connected products/services?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises saying that the current telecoms policy and regulatory frameworks/rules hinder the ability to pursue digital transformation and/or commercialise connected products/services.
Percentage of respondents. Respondents could select up to four options.

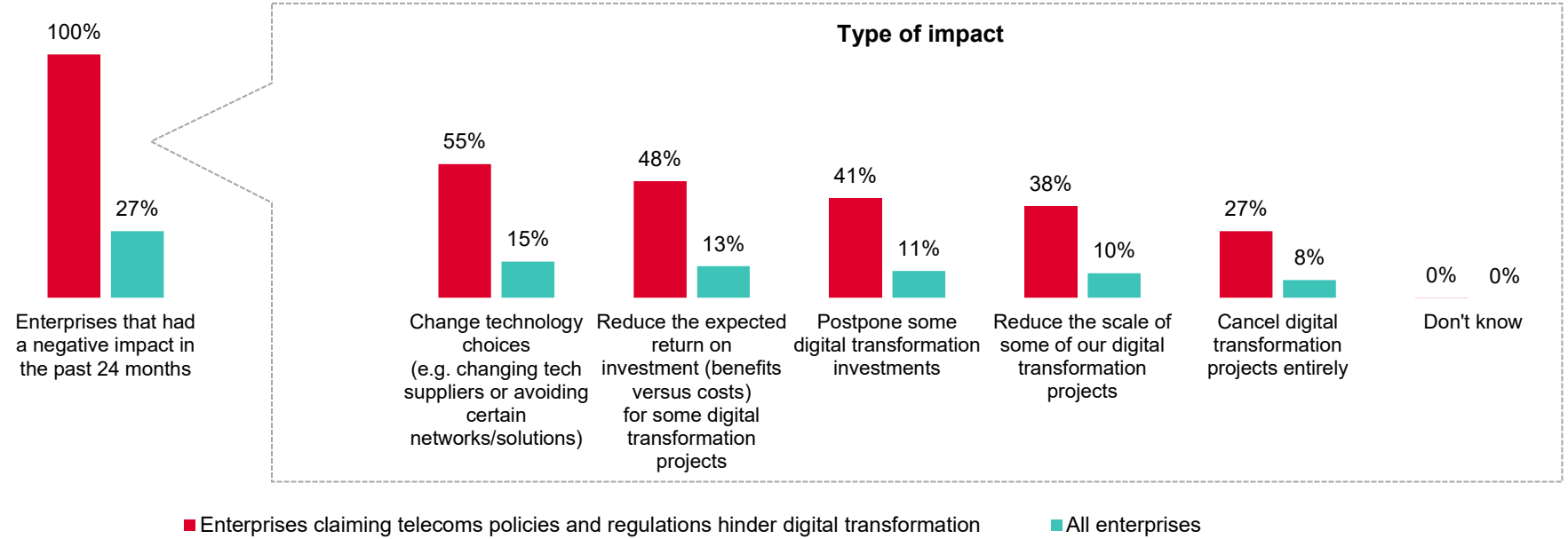



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **Impact of telecoms policy and regulation**: almost 3 in 10 enterprises have been negatively impacted in last two years

**Implications of telecoms policy and regulatory requirements**
In the past 24 months, have telecoms policy and regulatory requirements led your company to do any of the following for digital transformation projects in your primary country of operations?
Aggregate figures across all countries and vertical sectors surveyed. Percentage of respondents. Respondents could select all that apply.

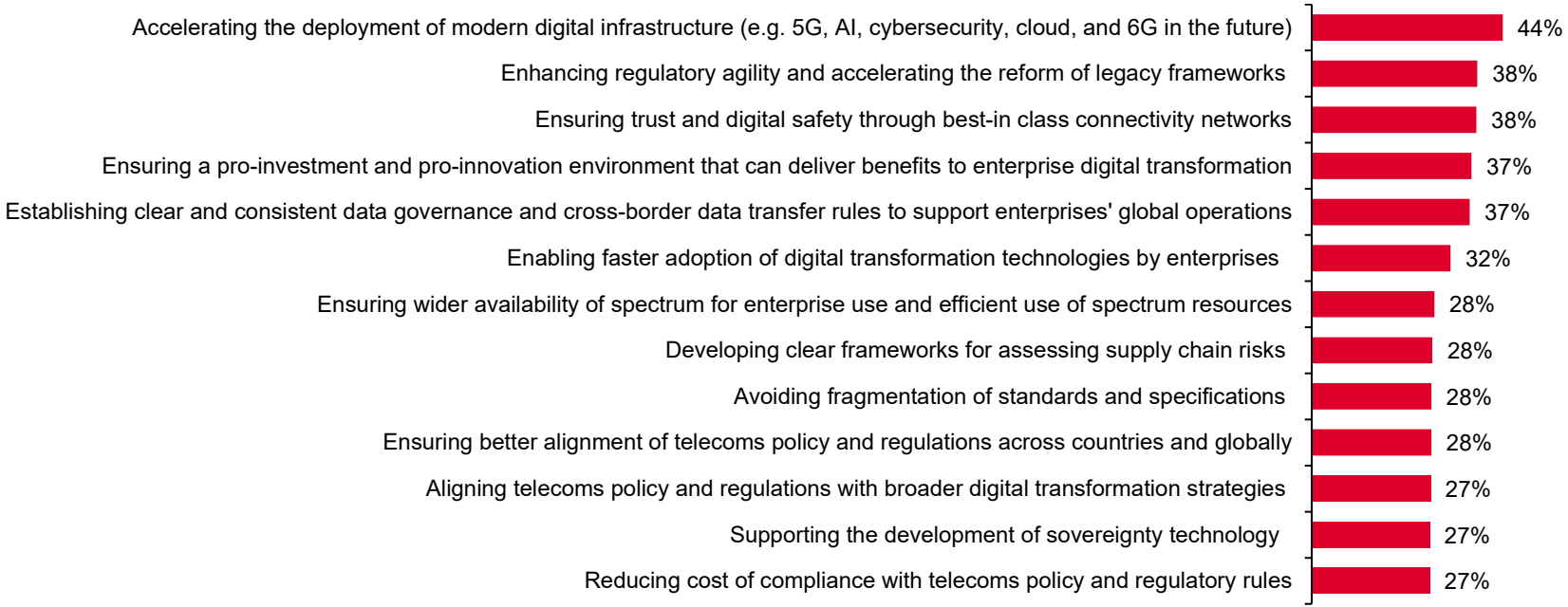



Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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# **Policy and regulation goals**: deploying modern digital infrastructure leads; four areas almost tied for second

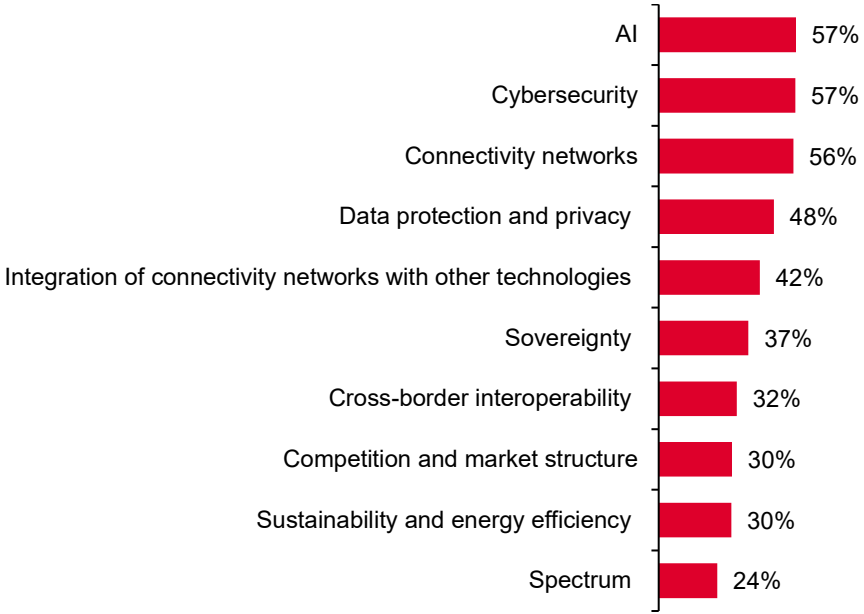
**Goals of telecoms policy and regulation modernisation**
What should be the main goals of telecoms policy and regulation modernisation to better support your company's digital transformation?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents.
Respondents could select up to five options.




Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

# **Policy and regulation priorities:** AI, cybersecurity and connectivity networks lead; sustainability a lesser concern

**Priorities for telecoms policymakers and regulators in the next three years**
To help your company accelerate your digital transformation in your primary country of operations, which of the following areas should telecoms policymakers and regulators prioritise in the next three years?
Aggregate figures across all countries and vertical sectors surveyed. Base is enterprises undertaking digital transformation. Percentage of respondents. Respondents could select up to five options.




| Examples |
|---|
| Governance, ethics, wider access to AI, and tech developments such as agentic AI, robotics, autonomous mobility/transportation, network automation |
| Building secure, resilient and trusted systems to ensure digital safety, helping tackle cyberthreats, fraud, scams, and vendor risk management |
| Deployment of next-generation networks (5G and 6G) to enable enhanced capabilities (slicing, edge and enterprise-grade service differentiation and assurance) |
| Compliance with data protection frameworks; requirements for digital identity and authentication |
| Deeper integration of cellular and satellite networks; deeper integration of cellular, cloud/edge and AI technologies |
| Ability of a country to produce/protect its own critical communication networks, digital infrastructure, technology, data and digital systems |
| Technical interoperability across networks, platforms, devices and services; regulatory alignment on cross-border data transfers |
| Fair competition, consolidation, wholesale access, infrastructure sharing and co-investment |
| Initiatives and practices aimed at improving energy efficiency and accelerating progress on net zero, ESG and circularity |
| Wider availability of spectrum for enterprise use (public or private networks) and efficient use of spectrum resources |

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

# Contents


1 Key findings and global comparisons

2 Enterprise views: selected findings

- Digital transformation overall
- 5G and AI
- Tech sovereignty
- Telecoms policy and regulation

3 Countries at a glance

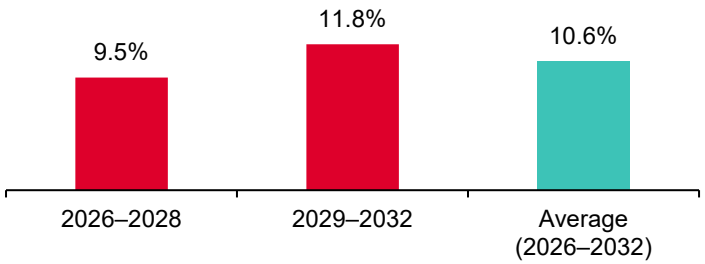
4 Survey details


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# Egypt
# Digital transformation of industries: selected findings

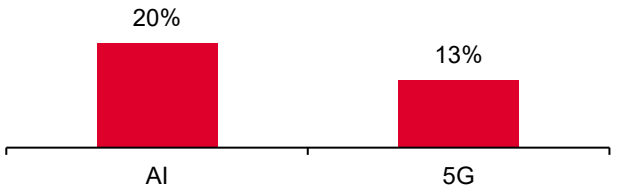
## Enterprise spend on digital transformation

**Percentage of enterprise revenues**




## Enterprise spend on AI and 5G

**Percentage of total spend on digital transformation (2026–2032)**




## Willingness to pay extra for sovereign tech

**Average extra amount**

**15.0%**

## Modernisation of telecoms policy and regulation

**Top three goals**

| | |
|---|---|
| Accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud, and 6G in the future) | 1st |
| Ensuring trust and digital safety through best-in-class connectivity networks (e.g. secure and resilient networks) | 2nd |
| Establishing clear and consistent data governance and cross-border data transfer rules to support enterprise global operations and innovation in digital services | 3rd |

*AI is generative AI and wider AI. 5G is 5G mobile connectivity and 5G devices (including custom networks).
Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

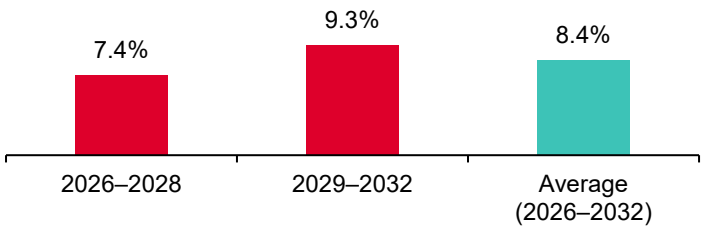
Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026.

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# Iraq
# Digital transformation of industries: selected findings

## Enterprise spend on digital transformation

**Percentage of enterprise revenues**




## Enterprise spend on AI and 5G

**Percentage of total spend on digital transformation (2026–2032)**




## Willingness to pay extra for sovereign tech

**Average extra amount**

**11.2%**

## Modernisation of telecoms policy and regulation

**Top three goals**

| | |
|---|---|
| Accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud, and 6G in the future) | 1st |
| Enhancing regulatory agility (e.g. for faster and more predictable approvals and for more flexible licensing) and accelerating the reform of legacy frameworks | 2nd |
| Ensuring trust and digital safety through best-in-class connectivity networks (e.g. secure and resilient networks) | 3rd |

*AI is generative AI and wider AI. 5G is 5G mobile connectivity and 5G devices (including custom networks).
Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

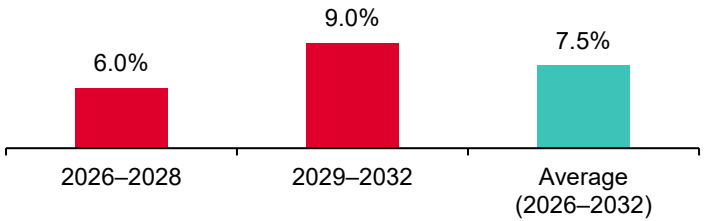
Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026.

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# Kuwait
# Digital transformation of industries: selected findings

## Enterprise spend on digital transformation

**Percentage of enterprise revenues**




## Enterprise spend on AI and 5G

**Percentage of total spend on digital transformation (2026–2032)**




## Willingness to pay extra for sovereign tech

**Average extra amount**

**11.9%**

## Modernisation of telecoms policy and regulation

**Top three goals**

| | |
|---|---|
| Enhancing regulatory agility (e.g. for faster and more predictable approvals and for more flexible licensing) and accelerating the reform of legacy frameworks | 1st |
| Establishing clear and consistent data governance and cross-border data transfer rules to support enterprise global operations and innovation in digital services | 2nd |
| Ensuring trust and digital safety through best-in-class connectivity networks (e.g. secure and resilient networks) | 3rd |

*AI is generative AI and wider AI. 5G is 5G mobile connectivity and 5G devices (including custom networks).
Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

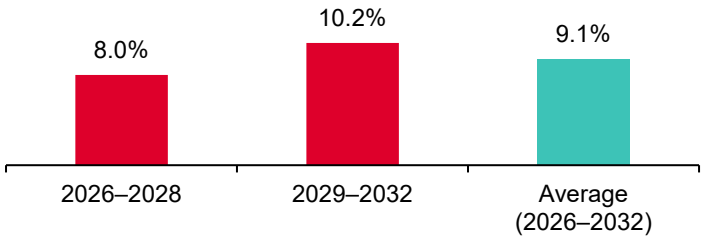
Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026.

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# Morocco
# Digital transformation of industries: selected findings

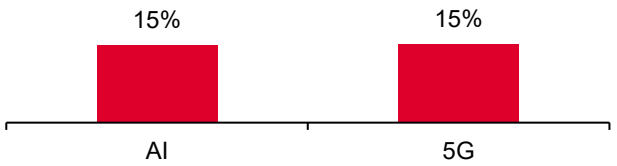
## Enterprise spend on digital transformation

**Percentage of enterprise revenues**




## Enterprise spend on AI and 5G

**Percentage of total spend on digital transformation (2026–2032)**




## Willingness to pay extra for sovereign tech

**Average extra amount**

**12.2%**

## Modernisation of telecoms policy and regulation

**Top three goals**

| | |
|---|---|
| Accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud and 6G in the future) | 1st |
| Ensuring trust and digital safety through best-in-class connectivity networks (e.g. secure and resilient networks) | 2nd |
| Establishing clear and consistent data governance and cross-border data transfer rules to support enterprise global operations and innovation in digital services | 3rd |

*AI is generative AI and wider AI. 5G is 5G mobile connectivity and 5G devices (including custom networks).
Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

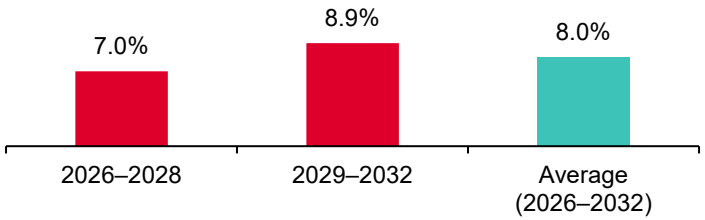
Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026.

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# Oman
# Digital transformation of industries: selected findings

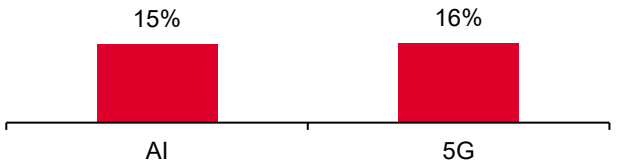
## Enterprise spend on digital transformation

**Percentage of enterprise revenues**




## Enterprise spend on AI and 5G

**Percentage of total spend on digital transformation (2026–2032)**




## Willingness to pay extra for sovereign tech

**Average extra amount**

**11.7%**

## Modernisation of telecoms policy and regulation

**Top three goals**

| | |
|---|---|
| Ensuring a pro-investment and pro-innovation environment that can deliver benefits to enterprise digital transformation | 1st |
| Ensuring trust and digital safety through best-in-class connectivity networks (e.g. secure and resilient networks) | 2nd |
| Accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud, and 6G in the future) | 3rd |

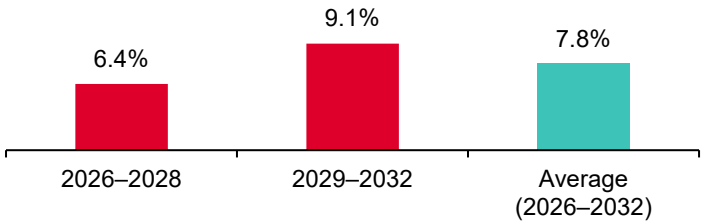
*AI is generative AI and wider AI. 5G is 5G mobile connectivity and 5G devices (including custom networks).
Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026.

# Qatar
# Digital transformation of industries: selected findings

## Enterprise spend on digital transformation

**Percentage of enterprise revenues**




## Enterprise spend on AI and 5G

**Percentage of total spend on digital transformation (2026–2032)**




## Willingness to pay extra for sovereign tech

**Average extra amount**

**11.9%**

## Modernisation of telecoms policy and regulation

**Top three goals**

| | |
|---|---|
| Enhancing regulatory agility (e.g. for faster and more predictable approvals and for more flexible licensing) and accelerating the reform of legacy frameworks | 1st |
| Accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud, and 6G in the future) | 2nd |
| Ensuring trust and digital safety through best-in class connectivity networks (e.g. secure and resilient networks) | 3rd |

*AI is generative AI and wider AI. 5G is 5G mobile connectivity and 5G devices (including custom networks).
Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

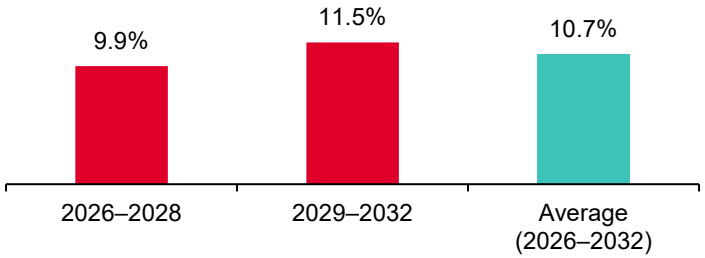
Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026.

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# Saudi Arabia
## Digital transformation of industries: selected findings

### Enterprise spend on digital transformation

**Percentage of enterprise revenues**




### Enterprise spend on AI and 5G

**Percentage of total spend on digital transformation (2026–2032)**




### Willingness to pay extra for sovereign tech

**Average extra amount**

**15.1%**

### Modernisation of telecoms policy and regulation

**Top three goals**

| | |
|---|---|
| Accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud, and 6G in the future) | 1st |
| Establishing clear and consistent data governance and cross-border data transfer rules to support enterprise global operations and innovation in digital services | 2nd |
| Enabling faster adoption of digital transformation technologies by enterprises | 3rd |

*AI is generative AI and wider AI. 5G is 5G mobile connectivity and 5G devices (including custom networks).
Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

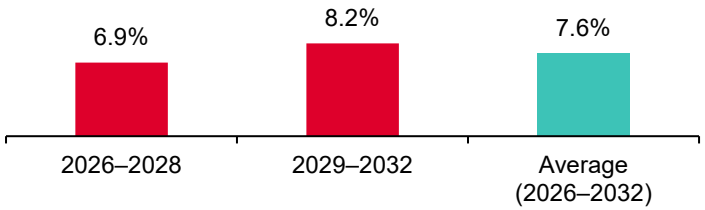
Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026.

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# Tunisia
## Digital transformation of industries: selected findings

### Enterprise spend on digital transformation

**Percentage of enterprise revenues**




### Enterprise spend on AI and 5G

**Percentage of total spend on digital transformation (2026–2032)**




### Willingness to pay extra for sovereign tech

**Average extra amount**

**11.1%**

### Modernisation of telecoms policy and regulation

**Top three goals**

| | |
|---|---|
| Accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud, and 6G in the future) | 1st |
| Ensuring a pro-investment and pro-innovation environment that can deliver benefits to enterprise digital transformation | 2nd |
| Enhancing regulatory agility (e.g. for faster and more predictable approvals and for more flexible licensing) and accelerating the reform of legacy frameworks | 3rd |

*AI is generative AI and wider AI. 5G is 5G mobile connectivity and 5G devices (including custom networks).
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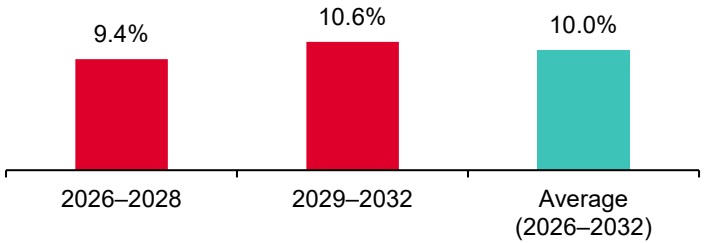
Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026.

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# Türkiye
# Digital transformation of industries: selected findings

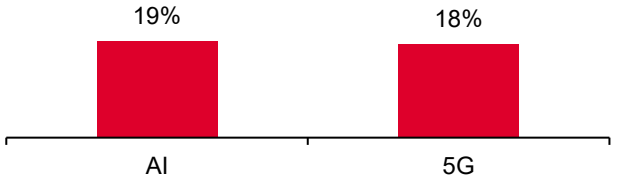
## Enterprise spend on digital transformation

**Percentage of enterprise revenues**




## Enterprise spend on AI and 5G

**Percentage of total spend on digital transformation (2026–2032)**




## Willingness to pay extra for sovereign tech

**Average extra amount**

**14.5%**

## Modernisation of telecoms policy and regulation

**Top three goals**

| | |
|---|---|
| Ensuring a pro-investment and pro-innovation environment that can deliver benefits to enterprise digital transformation | 1st |
| Accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud, and 6G in the future) | 2nd |
| Enabling faster adoption of digital transformation technologies by enterprises | 3rd |

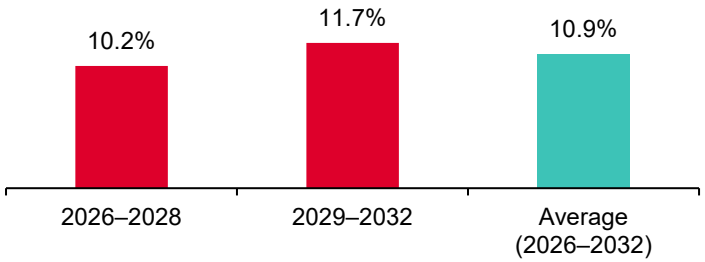
*AI is generative AI and wider AI. 5G is 5G mobile connectivity and 5G devices (including custom networks).
Aggregate figures across the 10 vertical sectors surveyed. Base is enterprises undertaking digital transformation.

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026.

# UAE
# Digital transformation of industries: selected findings

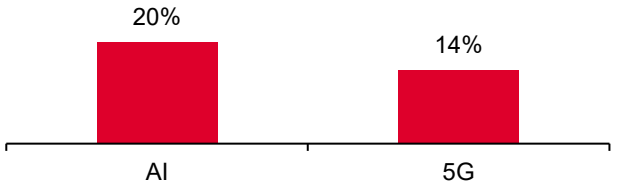
## Enterprise spend on digital transformation

**Percentage of enterprise revenues**




## Enterprise spend on AI and 5G

**Percentage of total spend on digital transformation (2026–2032)**




## Willingness to pay extra for sovereign tech

**Average extra amount**

**15.1%**

## Modernisation of telecoms policy and regulation

**Top three goals**

| | |
|---|---|
| Enhancing regulatory agility (e.g. for faster and more predictable approvals and for more flexible licensing) and accelerating the reform of legacy frameworks | 1st |
| Accelerating the deployment of modern digital infrastructure (e.g. 5G, AI, cybersecurity, cloud, and 6G in the future) | 2nd |
| Establishing clear and consistent data governance and cross-border data transfer rules to support enterprise global operations and innovation in digital services | 3rd |

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

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026.

# Contents


1 Key findings and global comparisons

2 Enterprise views: selected findings

- Digital transformation overall
- 5G and AI
- Tech sovereignty
- Telecoms policy and regulation

3 Countries at a glance

4 Survey details


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# Global Digital Transformation Survey 2026
## 50 countries in focus and 6,342 enterprises surveyed

**Countries (number of enterprises surveyed)**

| North America | Latin America | Europe | Eurasia | Middle East and North Africa | Sub-Saharan Africa | Asia Pacific | Other |
|---|---|---|---|---|---|---|---|
| Canada (N=106) | Argentina (N=108) | France (N=256) | Azerbaijan (N=107) | Egypt (N=102) | Ghana (N=57) | Australia (N=100) | China (N=359) |
| US (N=400) | Brazil (N=151) | Germany (N=301) | Kazakhstan (N=101) | Iraq (N=77) | Kenya (N=79) | India (N=258) | |
| | Chile (N=84) | Italy (N=260) | Uzbekistan (N=100) | Kuwait (N=55) | Nigeria (N=77) | Indonesia (N=105) | |
| | Colombia (N=76) | Poland (N=109) | | Morocco (N=107) | South Africa (N=110) | Japan (N=202) | |
| | Costa Rica (N=53) | Romania (N=80) | | Oman (N=50) | Tanzania (N=56) | Malaysia (N=159) | |
| | Dominican Republic (N=50) | Spain (N=207) | | Qatar (N=109) | Uganda (N=54) | Philippines (N=106) | |
| | Ecuador (N=50) | Sweden (N=82) | | Saudi Arabia (N=102) | | Singapore (N=109) | |
| | Mexico (N=150) | UK (N=301) | | Tunisia (N=75) | | South Korea (N=102) | |
| | Peru (N=77) | | | Türkiye (N=101) | | Taiwan (N=105) | |
| | | | | UAE (N=107) | | Thailand (N=100) | |
| | | | | | | Vietnam (N=110) | |

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026

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# Global Digital Transformation Survey 2026

## 10 vertical sectors in focus and 6,342 enterprises surveyed

| **Vertical sectors** (number of enterprises surveyed) | **Sub-sectors** |
|---|---|
| **Manufacturing and industrial sectors** (N=870) | 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 the manufacturing and industrial sectors |
| **Transportation, logistics and warehousing** (N=752) | 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** (N=558) | 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** (N=686) | Electricity, gas or water; oil and 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** (N=803) | Banking; insurance; real-estate investment; asset management; private equity and venture capital; credit services; brokerage services; other areas in financial services |
| **Healthcare** (N=672) | Healthcare providers and services; pharmaceuticals; biotechnology; life sciences tools and services; healthcare technology; medical devices and equipment; other areas in healthcare |
| **Retail** (N=681) | 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** (N=489) | 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** (N=396) | Crop production; animal production; fishing; forestry; other areas in agriculture, forestry and fishing |
| **Public sector** (N=435) | 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 the public sector |

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026

# Global Digital Transformation Survey 2026
## Survey and Dashboard

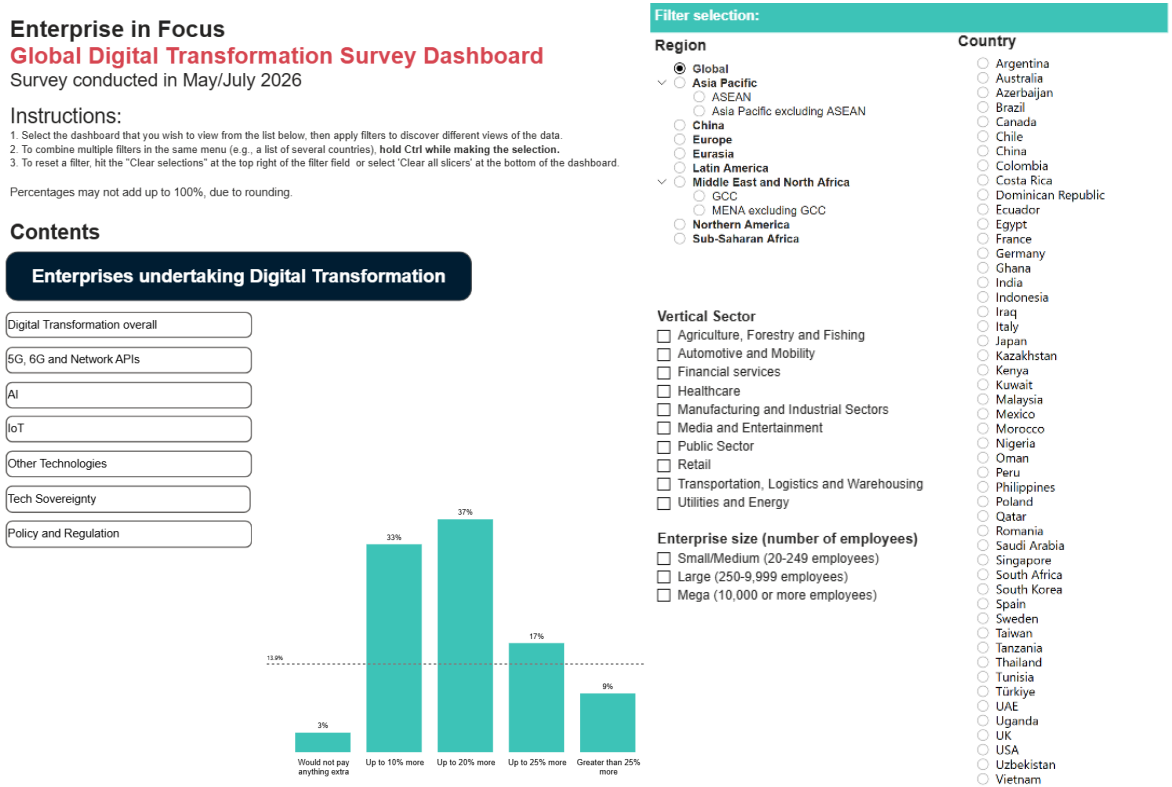
For each enterprise, GSMA Intelligence targeted respondents who either are decision-makers for digital transformation plans/projects or provide recommendations to decision-makers.

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

The accompanying global dashboard provides the full survey data – a valuable asset for companies looking to focus on specific vertical sectors, regions, countries or customer size.

The dashboard includes filters for:

- 10 vertical sectors
- 50 countries
- 8 regions
- three sizes of organisation (SMEs, large enterprises and mega enterprises).



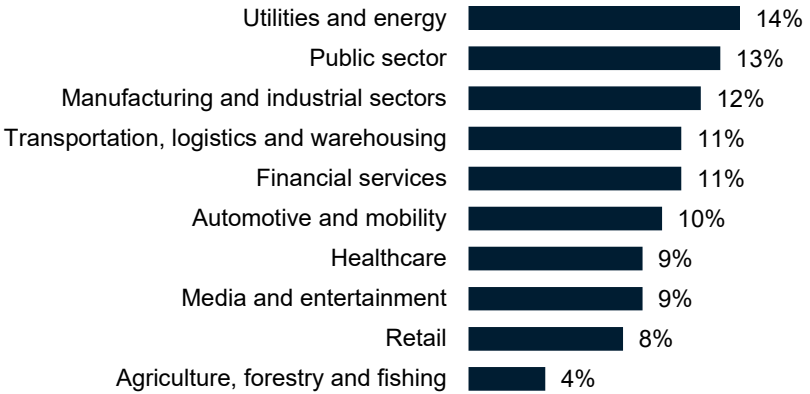

Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026

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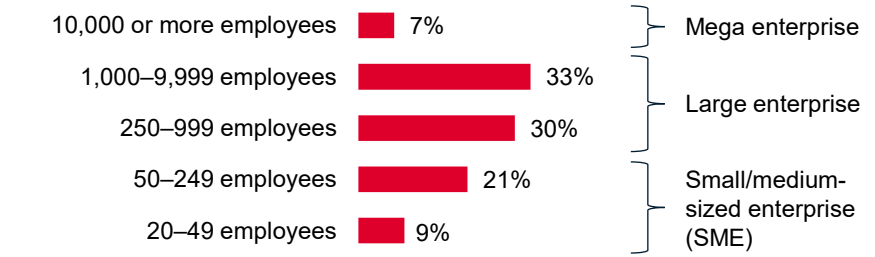
# Digital Transformation Survey 2026: MENA

## 885 enterprises across 10 countries and 10 vertical sectors

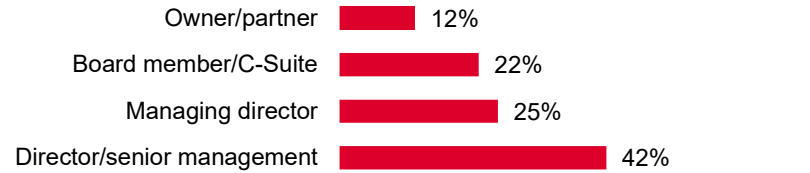
### Survey breakdown by vertical sector



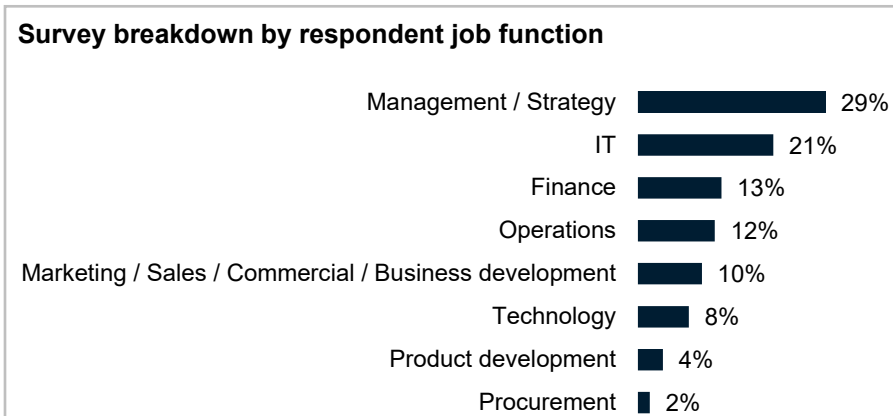

### Survey breakdown by organisation size (number of employees)




### Survey breakdown by respondent job level




### Survey breakdown by respondent job function




Percentages may not add up due to rounding
Source: GSMA Intelligence Enterprise in Focus: Global Digital Transformation Survey 2026. Data refers to MENA.

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