



CEO Study

## **MENA's AI advantage**

Opportunity to leap  
ahead and lead

Middle East and North Africa perspective

In collaboration with





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## Foreword



As the MENA region stands at the threshold of an AI-driven future, the opportunity to lead and leap ahead has never been clearer. With visionary leadership, untapped resources, and a tech-savvy empowered population, the region has all the ingredients to shape a transformative AI journey and the potential to leapfrog global benchmarks. But this moment demands more than ambition; it requires bold action—strategic investments, unified efforts, and a relentless focus on bridging ambition with execution.

This report offers MENA CEOs actionable insights to guide transforming AI from a promising opportunity into a strategic advantage.

The future of AI leadership is ours to claim, and the time to act is now.

**Harrison Lung,**  
Group Chief Strategy Officer, e&



AI is projected to enhance human productivity and unlock an astounding \$16T in value by 2030. With ambitious national strategies, a relentless drive for innovation, and a skilled talent pool, MENA is in a unique position to not only adopt AI but to lead on the global stage.

At IBM, we have always believed in the fundamental promise of technology to drive meaningful change. And at the core of this promise is an open, trusted, hybrid approach to AI.

We are proud to partner with e&, to capture the region's readiness to accelerate AI's impact across sectors. Together, we are helping CEOs and boards navigate the AI frontier, with a clear focus on building infrastructure, scaling talent, and unlocking data to fuel business success.

MENA's leadership in AI is rewriting the playbook, and this is just the beginning.

**Saad Toma,**  
General Manager, IBM Middle East & Africa



# Executive summary

The MENA region stands on the cusp of a transformative era, with artificial intelligence (AI) at the heart of this opportunity. Historically slower in adopting emerging technologies, the MENA region now has the chance to leapfrog ahead, establishing itself as a leader in AI-driven innovation.

Before we go further, it is essential to recognise that the MENA region is far from a monolith. While certain markets share similarities, significant differences exist in economic structures, regulatory environments, and technological readiness. Tailoring strategies to individual markets is critical for success, as a one-size-fits-all approach fails to account for the region’s diversity.

**But what makes the MENA region’s story unique?** What unites many MENA countries is regional governments leading from the front with ambitious national visions backed by massive investments. The region is charting its own path towards innovation, focusing on AI models tailored to unique regional needs. Add to that a trifecta of strengths: abundant capital, energy resources, and a youthful, tech-savvy population eager to embrace the future.

Yet, as inspiring as this momentum is, the journey forward isn’t without hurdles. While insights from interviews with key regional CEOs and policymakers in the UAE, Saudi Arabia, and Egypt, along with perspectives from global C-suite executives, reinforce the region’s consensus on the transformative potential of AI, they also highlight gaps and challenges unique to the region.

# For example,



**A significant majority of CEOs** — Regionally - **65%**  
Globally - **61%**<sup>1</sup>  
acknowledged pushing their organisations beyond comfort zones to adopt Generative AI (GenAI), highlighting belief in immense potential of AI.



However, at the same time, MENA CEOs showed a bigger drop in confidence in their digital infrastructure to deliver value **between 2023-2024—with 82% to 64% (MENA) vs 83% to 71% (globally)**, pointing to a critical need for region-specific strategies to address capability, infrastructure gaps, and the pace of innovation.

So, how do organisations move from ambition to action? And what does it take to translate potential into measurable results?

This research, conducted in collaboration with e& and the IBM Institute for Business Value, provides a roadmap for navigating uncertainty. We identified critical themes around talent, technology, infrastructure, regulations, and partnerships for regional business leaders to consider as they navigate and prepare their organisations to seize the AI opportunity. The MENA region has all the ingredients to lead in AI—visionary governments, resourceful businesses, and ambitious youth. What’s needed now is bold, pragmatic leadership to bridge the gap between aspiration and execution.

[1] Global C-suite Series 29th Edition. “6 hard truths CEOs must face”. IBM Institute for Business Value. May 2024.



# MENA's opportunity to leap into AI leadership

The MENA region is no stranger to ambition. Yet, unlike previous waves of innovation, AI's transformational pace is different from anything the region has seen before. And what sets it apart this time is the governments' proactive role in leading AI adoption. From the UAE's National Strategy for Artificial Intelligence 2031<sup>2</sup> to Saudi Arabia's National Strategy for Data & AI<sup>3</sup>, governments are making bold moves to embed AI at the heart of their national transformation agendas, signalling a region-wide push to lead the next wave of AI transformation with the MENA region as a global hub for AI innovation.

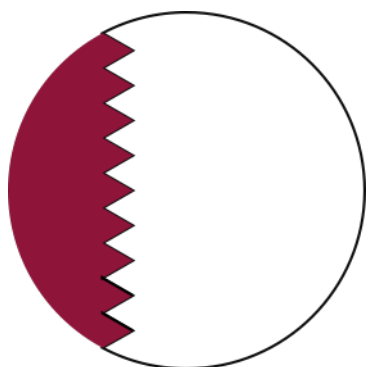
Across the region, governments are fortifying their AI strategies with targeted investments in research, education, and infrastructure. **Take, for example,**



Saudi Arabia's potential **\$100 billion** AI investment initiative<sup>4</sup>.



The UAE's Mohammed Bin Zayed University of Artificial Intelligence, which has already **made its mark in global GenAI research**.



Then there is the development of **local Large Language Models** (LLMs) such as Fanar (Qatar), ALLaM (Saudi Arabia), and Jais (UAE).

These localised AI innovations aren't isolated efforts of AI adoption but emblematic of a critical trend: MENA governments are defining how AI evolves for their unique national needs.

And they're not doing it alone—collaborations, such as those between regional governments and global tech giants— for example, Google's expansion into Qatar and Saudi Arabia<sup>5</sup> with new cloud regions—have driven the development of AI infrastructure for an entire ecosystem, enabling inclusive growth across diverse sectors.

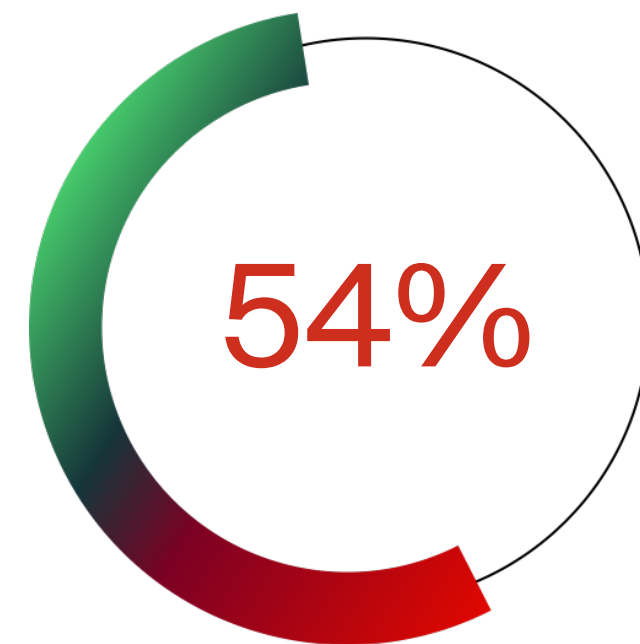
[2] UAE National Strategy for Artificial Intelligence 2031. Artificial Intelligence Office. July 2021.  
[3] National Strategy for Data & AI. Saudi Data & AI Authority (SDAIA). July 2020.  
[4] Marissa Newman, Julia Love, Mark Bergen, and Christine Burke. Saudis Plan \$100 Billion AI Powerhouse to Rival UAE Tech Hub. Bloomberg. November 2024.  
[5] PIF and Google Cloud to create advanced AI hub in Saudi Arabia. Public Investment Fund.



## MENA's opportunity to leap into AI leadership

Governments are also investing heavily in upskilling initiatives such as Microsoft's collaboration with UAE authorities to train 100,000 government employees in AI<sup>6</sup> and equip one million individuals in the UAE with AI skills by 2031<sup>7</sup> future-proofing the workforce for large-scale adoption.

This government-driven momentum has rippled across the private sector as businesses recognise the inevitable transformative value of AI's potential for growth and innovation.



### of MENA CEOS

identified advanced GenAI as the key to gaining a competitive advantage.

In other words, as MENA governments create a ripe environment for AI to thrive at scale, businesses are poised to follow the lead and leverage the foundational infrastructure being built today. For CEOs across the region, this moment demands bold action to capitalise on MENA's AI momentum. The AI race is on to lead—not just follow.

“

In the UAE, Saudi Arabia and across the region, senior officials and executives consistently express a deep interest in AI.

**George Nazi,**  
CEO, Saudi Company for Artificial Intelligence

[6] Microsoft launches AI skills initiative to train 100,000 UAE government employees. Fast Company Middle East. October 2024.

[7] Sheikh Hamdan announces plan to train one million people in AI. The National. November 2024.



## Anchoring AI aspirations in organisational realities

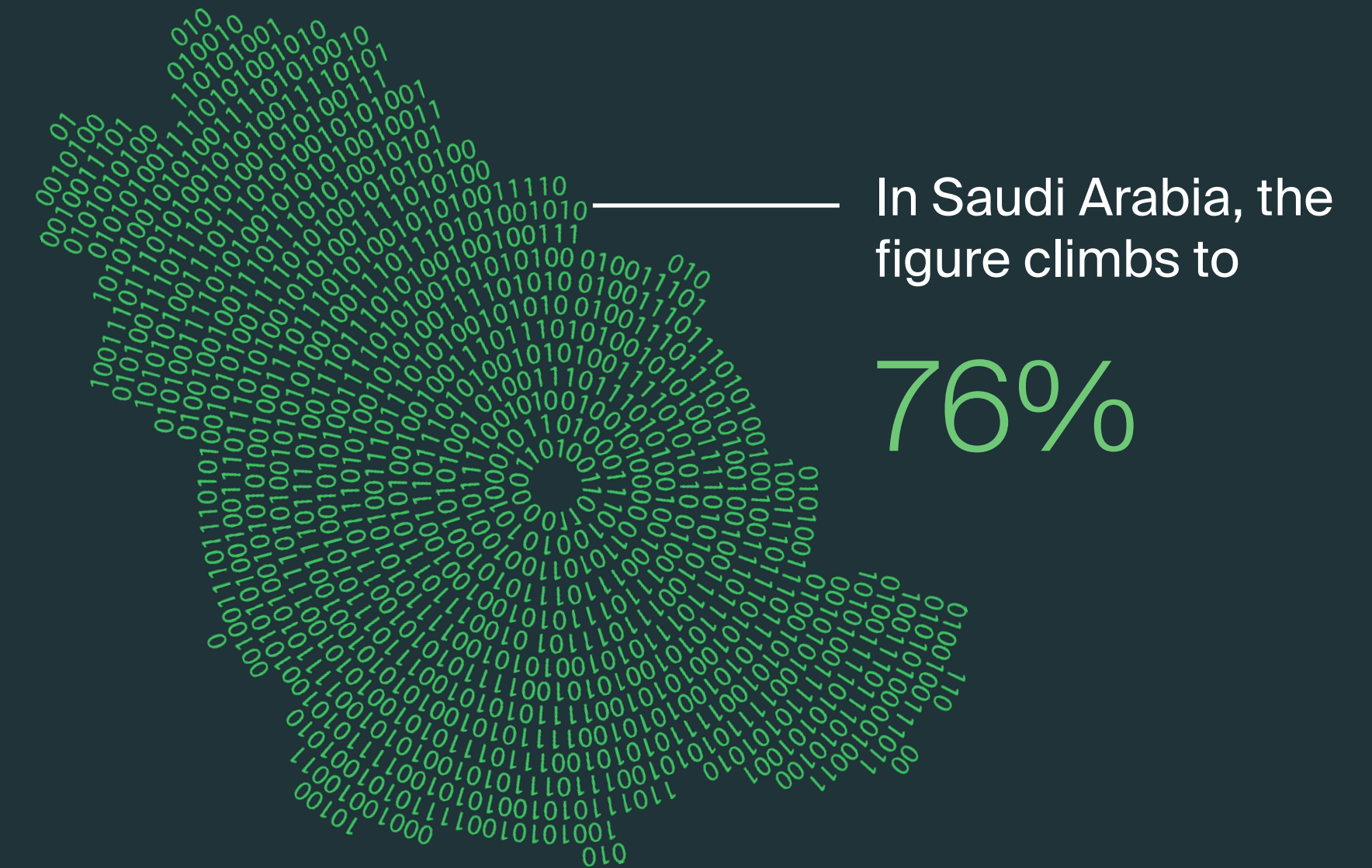
Ambitions are high, but as businesses across the MENA region race to reap AI's burgeoning potential, one question looms large:  
**Are they truly ready to take this ambitious leap?**

[8] The state of gen AI in the Middle East's GCC countries: A 2024 report card. McKinsey & Company. November 2024.

## CEOs driving GenAI adoption at a pace uncomfortable to some

61% Global  
65% MENA  
62% UAE  
58% Egypt

A striking 65% of MENA CEOs admit to accelerating AI adoption often at a pace that may be uncomfortable for some within their organisation.



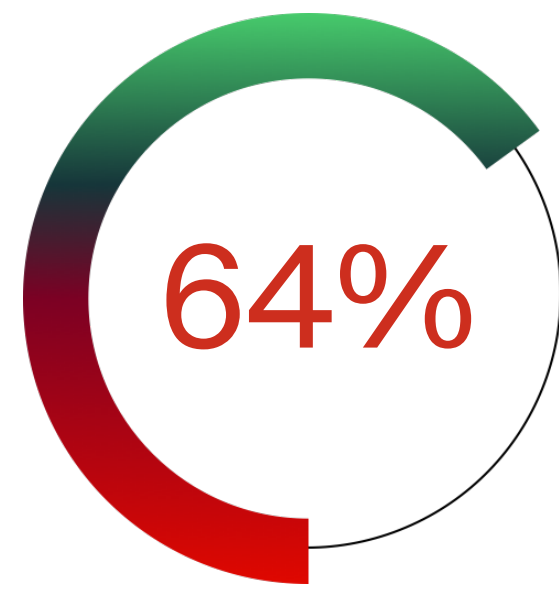
## Why the rush?

For one, the economic value AI promises is immense. In the UAE and Saudi Arabia alone, GenAI is expected to generate **\$15-25 billion** in annual incremental economic value<sup>8</sup>. **Add to this, the region's governments are leading the charge with transformative visions**, setting the pace with policies that prioritise innovation and growth, and inspiring businesses to take bold steps.

However, despite the optimism surrounding AI's potential, there's a stark reality check, and a critical gap emerges when comparing aspirations to organisational readiness.

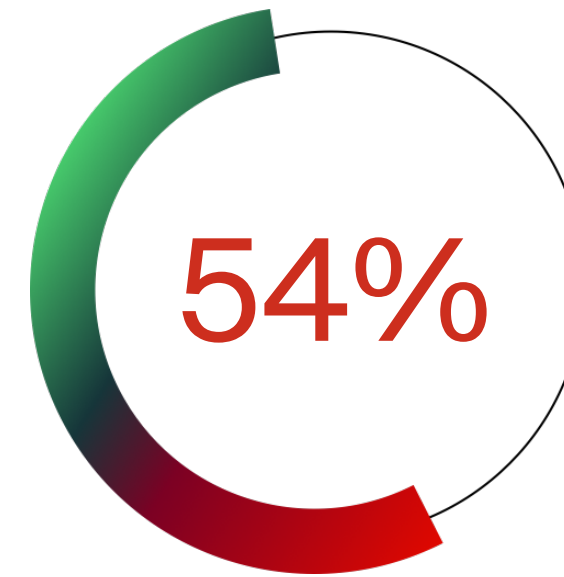


## From ambition to execution: Bridging the AI readiness divide



### MENA CEOs

believe that their digital infrastructure can support new investments to scale and deliver value. However, there's a potential disconnect between AI opportunities and the realities of organisational readiness.



### Tech leaders in MENA

believe their organisations have the necessary technology risk tolerance to successfully execute AI strategies – lower than the global figure of 63%.

This disconnect reveals a critical gap in readiness—not just in technology but in aligning people, processes, and strategy. Concerns around data privacy, security, and hybrid strategies compound the challenge, creating hesitation despite the immense promise.

**To close this gap, business leaders need to ask themselves tough questions: Are we clear about the foundational capabilities we must prioritise?** Do our talent, infrastructure, and data capabilities align with our ambitions? The answers often reveal a need for strategic investments in infrastructure and talent and a dual-speed approach—continuously and simultaneously prioritising quick wins to build momentum while investing in scalable infrastructure and leveraging government support to create an integrated ecosystem of strategy, infrastructure, and talent; and fostering an innovation-driven mindset where iterative progress is celebrated.

“

Pace is necessary but so is pragmatism. That's why, as leaders, we must balance bold ambitions with a clear-eyed view of reality and ask the tough questions about whether our talent, infrastructure, and strategies are truly prepared for the transformative potential of AI.

**Hatem Dowidar,**  
Group CEO, e&



## Top AI priorities for MENA CEOs

As we explored perspectives from regional leaders and juxtaposed them with findings from IBM's global CEO study, a clear picture emerged. We identified five key themes that are highly relevant to enabling AI transformation in the MENA region. **These critical transformational priorities are to help MENA CEOs accelerate, scale, and thrive with confidence and clarity on their AI journey.**



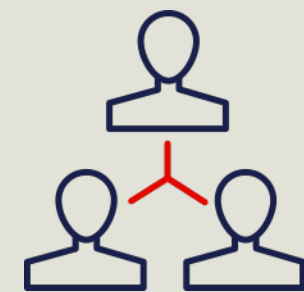
# 1

Scale success with robust hybrid cloud strategy



# 2

Invest in data architecture to build the core



# 3

Prioritise talent to accelerate the AI-first transition



# 4

Set the standard for Responsible AI to compete globally



# 5

Harness public sector momentum to drive ecosystem growth



# Top AI priorities for MENA CEOs

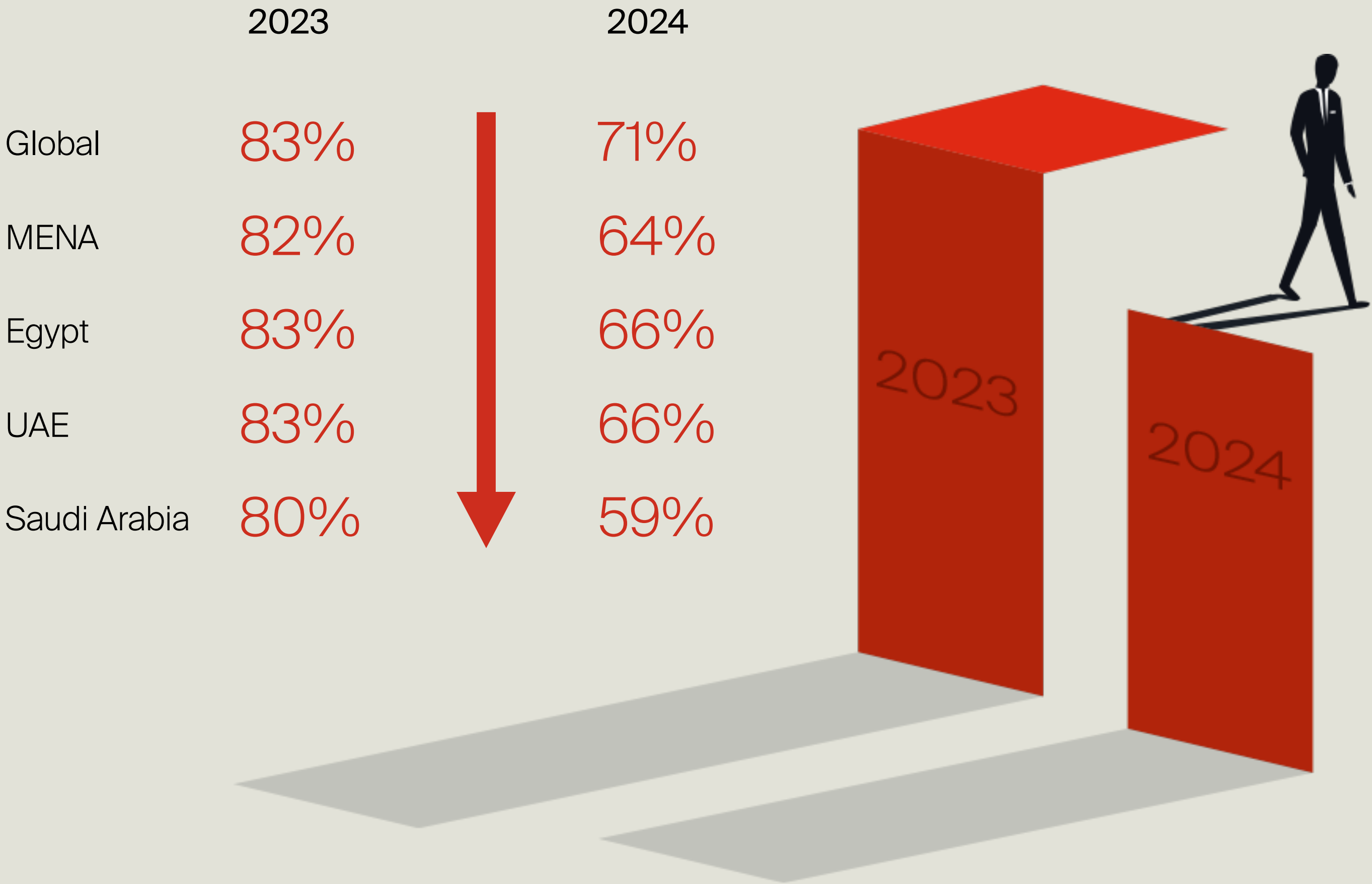
**1** Scale success with robust, hybrid cloud strategy



As organisations increasingly recognise the critical role that digital infrastructure plays in supporting the diverse and dynamic needs of AI applications, many are discovering that current capabilities fall short of what’s required to scale and support AI investments.

This is reflected by a drop in CEO confidence worldwide between **2023-24 – from 83% to 71% – and even more pronounced in the MENA region – from 82% to 64%**, with Saudi Arabia experiencing a particularly steep drop.

CEO confidence in digital infrastructure to enable new investments to scale and deliver value





# Why the decline?

Historically, MENA lagged global benchmarks in adopting cloud technologies. Barriers like limited access to hyperscalers and regulatory uncertainties, especially around data storage, have slowed progress.

However, the landscape is rapidly shifting with hyperscalers expanding presence in the region – Google launched cloud regions in Qatar and Saudi Arabia<sup>9</sup> that address local regulatory requirements, including data residency and localisation, and AWS is investing \$10 billion to establish cloud infrastructure in the UAE<sup>10</sup> and Saudi Arabia<sup>11</sup> – and regional players also increasing capacity – Abu Dhabi's Khazna Data Centres, one of the industry's largest operators in the Middle East, is building a 100-megawatt data centre and expecting to nearly double data centre capacity in the UAE to 850 megawatts by 2029<sup>12</sup>. This momentum is supported by government initiatives aimed at positioning the region as a global leader in AI adoption.

CEOs need to ensure that short-term business goals or narrow financial priorities do not hinder the critical long-term investments in hybrid cloud infrastructure. **Encouragingly, MENA CEOs are increasing their hybrid cloud spending by 21% year-on-year, signalling a growing commitment to future-proofing their organisations.** But scaling these efforts requires alignment across investment horizons, because too often timelines for IT investments are not in sync with long-term business strategy, creating siloes, and bottlenecks that limit ability to scale AI effectively.

To overcome these challenges, leaders must synchronise IT and business strategies and investment horizons, modernise infrastructure, and develop a workforce capable of managing the dual complexities of legacy systems and cloud-native platforms.

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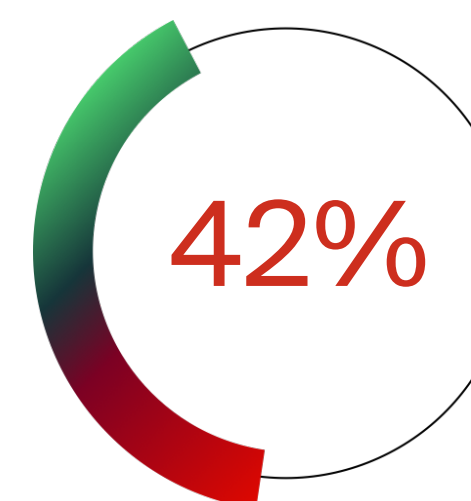
Collaboration between local and global partners in the MENA region is accelerating hybrid cloud infrastructures to fuel AI. Specifically, the ecosystem comes together to support the integration of existing and new-generation applications unlocking value from data for global competitiveness and productivity.

**Ana Paula Assis,**

Senior Vice President and Chair IBM EMEA and Growth Markets

The pace of change in AI and cloud technologies leaves little room for hesitation. Hybrid cloud infrastructure has shifted from a competitive advantage to a necessity for organisations seeking to remain competitive.

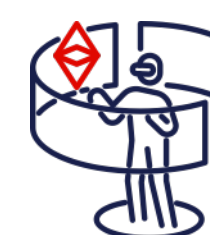
**CEOs in the MENA region are taking note:**



identifying hybrid cloud as a critical enabler for achieving results over the next three years.



**A clear cloud migration roadmap is critical**, enabling organisations to prioritise workloads, foster cross-functional collaboration and embed governance throughout the transition.



Leaders also have an important role to play in advocating for local access to advanced technologies. **By aligning infrastructure strategies with business objectives and emerging technology needs**, organisations can secure long-term success and thrive in the digital era.

[9] Google Cloud Global Locations - Regions & Zones. Google. November 2024.

[10] Mohamed Rashed Alkhalifa. Amazon Web Services Launches New Region, To Invest \$5B In UAE. Forbes Middle East. August 2022.

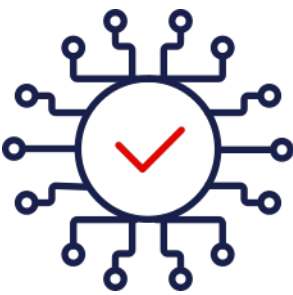
[11] Joyce Abaño. Amazon's AWS Announces Over \$5B Investment In Saudi Arabia To Meet Cloud Services Demand. Forbes Middle East. May 2024.

[12] Alvin R Cabral. Abu Dhabi's Khazna unveils UAE's largest data centre as it expects 850MW capacity by 2029. The National. November 2024.



Top AI priorities for MENA CEOs

2 Invest in data architecture to build the core



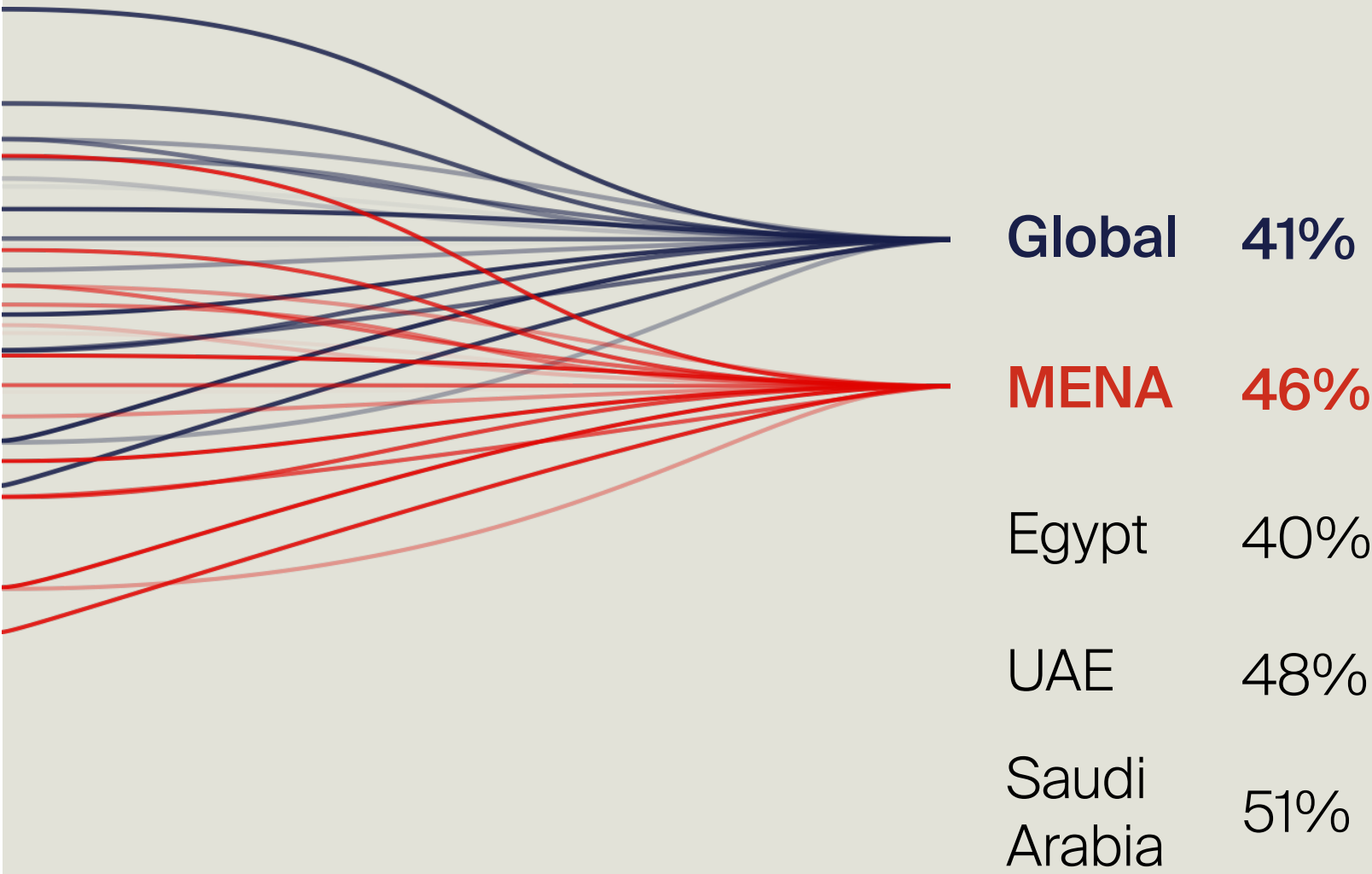
AI is only as good as the data it’s trained on. Fragmented, outdated data systems won’t cut it in a world where speed, accuracy, and insight drive success. CEOs across the MENA, grapple with the dual challenge of data quality and availability, compounded by the complexities of legacy IT infrastructure. The siloed and decentralised nature of data—scattered across devices, applications, and geographies—only adds to the struggle, leaving organisations vulnerable to inefficiencies, flawed insights, and missed opportunities.

Adding to the challenge, the region faces a lack of harmonised data and unified data regulations across markets, complicating efforts to address data-related issues effectively. The shift from centralised to federal data architectures—decentralising innovation—further underscores the need for stringent approaches to security, privacy, and efficiency. In the race for a technology in which data is its bloodline, building a strong data foundation is no longer optional; it’s a prerequisite for progress.

“ Adequate investments in data systems and their integrity as well as accessibility are essential prerequisites for any successful endeavour for AI ecosystems in developing economies and emerging markets.

Dr. Mahmoud Mohieldin,  
UN Special Envoy on Financing the 2030 Sustainable Development Agenda

Data architecture modernisation: The top priority for MENA CEOs over the next three years



It’s no surprise, then, that while GenAI is a top priority for global CEOs, MENA leaders are more focused on a critical enabler: modernising data architecture.

In fact, 46% of MENA CEOs recognise that modern data architecture (e.g., data fabric, data mesh) is the key to achieving the desired results in the next three years.

To realise their long-term AI ambitions, organisations need to strike a delicate balance between compliance and operational efficiency. A challenge that is compounded by stringent regulations around data usage, hampering adoption, and innovation.

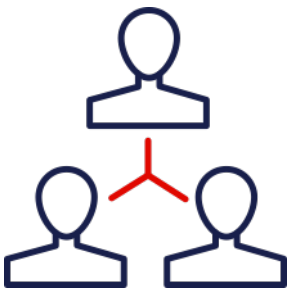
Organisations in the MENA region need to adopt a unified data strategy and modern data architecture, critical to enable centralised management and governance of diverse data sources. And the strategy needs to be supported by a robust governance system essential for efficient resource allocation, allowing organisations to prioritise tried-and-tested use cases in the short term while laying the groundwork for more innovative applications when ready.

Cultivating a data-driven culture is also crucial to maximise the impact of data and AI investments. By embedding data into workflows and promoting transparency, collaboration, and accountability, organisations can streamline the transition from legacy infrastructure to AI-powered systems.



## Top AI priorities for MENA CEOs

### 3 Prioritise talent to accelerate the AI-first transition

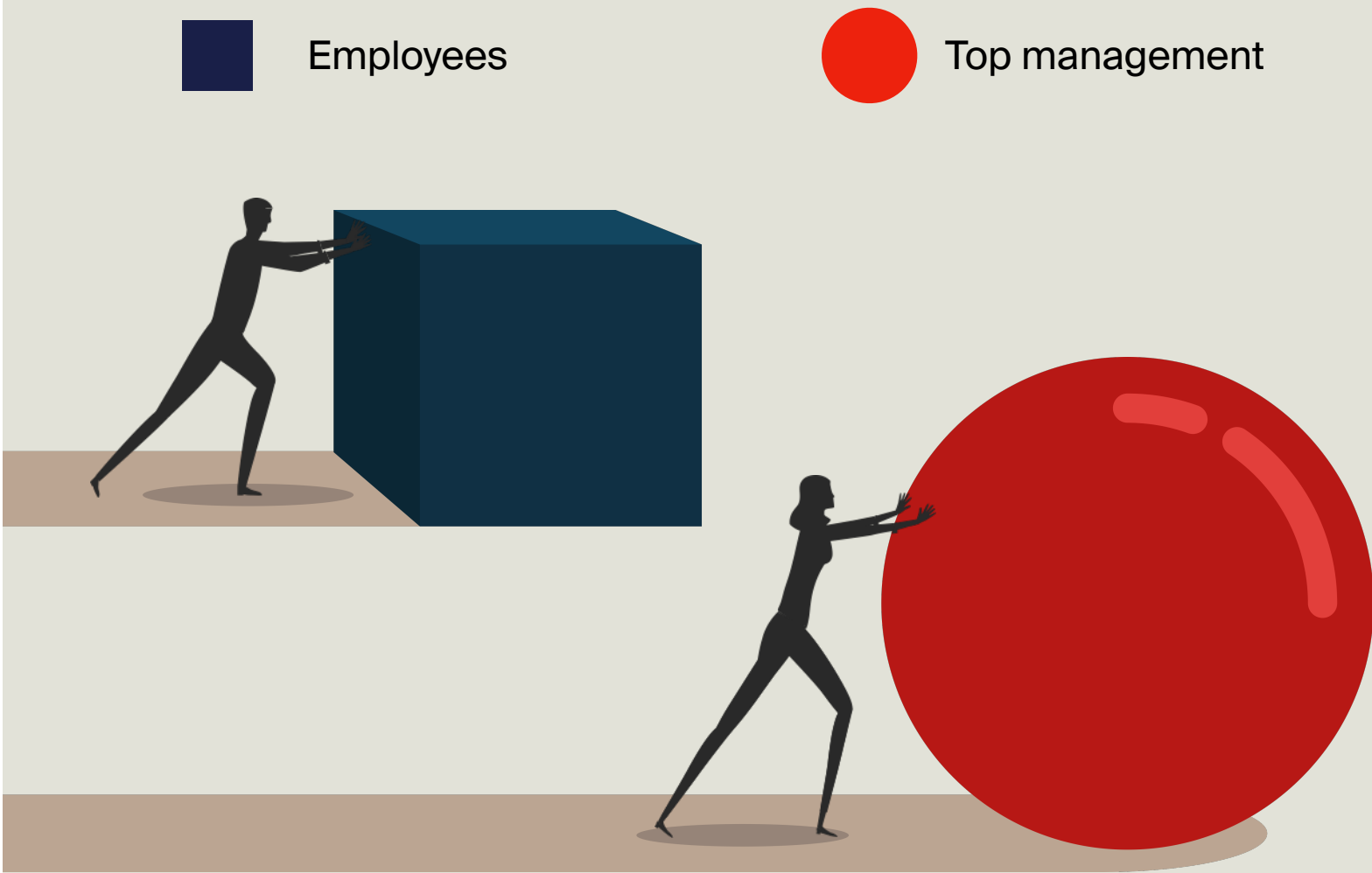


In the midst of rapid technological change and constant shifts in operating models, the challenge of attracting, integrating, and retaining top talent—though crucial to success—is often overlooked. **In the MENA region, only 23% of CEOs – even lower than the global average of 29% – are prioritising talent recruitment and retention.** This lack of focus in talent strategy demands urgent attention to ensure that organisations possess the right mix of capabilities to successfully transition their digital infrastructure from legacy technologies to AI-first systems.

As AI advancements accelerate, the need to continually reskill and upskill the workforce will intensify in the region. And this is likely to exacerbate as employees transitioning from legacy to AI systems and applications struggle to keep pace with rapid change, resulting in organisational resistance. Governments across the MENA region recognise this urgency. In the UAE, Microsoft partnered with local authorities to upskill 100,000 government employees in AI<sup>[13]</sup>. Meanwhile, Saudi Arabia has earmarked a potential \$100 billion investment in AI, focusing on attracting, developing, and retaining top talent<sup>[14]</sup>.

These initiatives are critical, but developing a region-wide talent pool takes time. As a result, organisations that delay evolving their talent strategies, risk falling behind in their AI journey and potentially missing out on valuable opportunities to gain a competitive edge in this space. **Organisations must act now by aligning talent roadmaps with business needs, fostering a culture of adaptability, and implementing robust change management. Upskilling and reskilling—through both governmental and internal programs—are essential for empowering employees to thrive in an AI-driven future.**

### CEO insights on organisational resistance to change across



MENA	43%	41%
Egypt	40%	32%
UAE	44%	40%
Saudi Arabia	45%	51%

[13] X.com - Hamdan bin Mohammed. X. November 2024.  
[14] Saudis Plan \$100 Billion AI Powerhouse to Rival UAE Tech Hub. Bloomberg. November 2024.

“

Truly unlocking AI's potential requires us to look beyond the allure of immediate breakthroughs to focus efforts on building organisational cultures that encourage sustained, long-term success. In fostering environments that address the needs of technical talent whilst ensuring their work is anchored within the businesses requirements allows for greater understanding of AI while fostering the collaboration, innovation, and inclusiveness that is key to high-performing teams. After all, the last thing you want is to create centres of excellence that sit on the sidelines.

Ahmed Galal Ismail,  
CEO, Majid Al Futtaim – Holding



# Top AI priorities for MENA CEOs

## 4 Set the standard for Responsible AI to compete globally



In a world increasingly powered by artificial intelligence, one truth stands out: trust and compliance is as essential as innovation. Responsible AI isn't just about mitigating risks—it's the key to unlocking sustainable growth.

For CEOs in both MENA and globally, the message is clear: the stakes are high and Responsible AI isn't a checkbox; it's the foundation for sustainable innovation. **For MENA CEOs, Data privacy (48%) and Regulatory compliance (43%) are the most frequently mentioned barriers to GenAI** around which concerns increased in the past six months. This trend highlights a growing awareness among CEOs that navigating these complexities is critical to AI success.

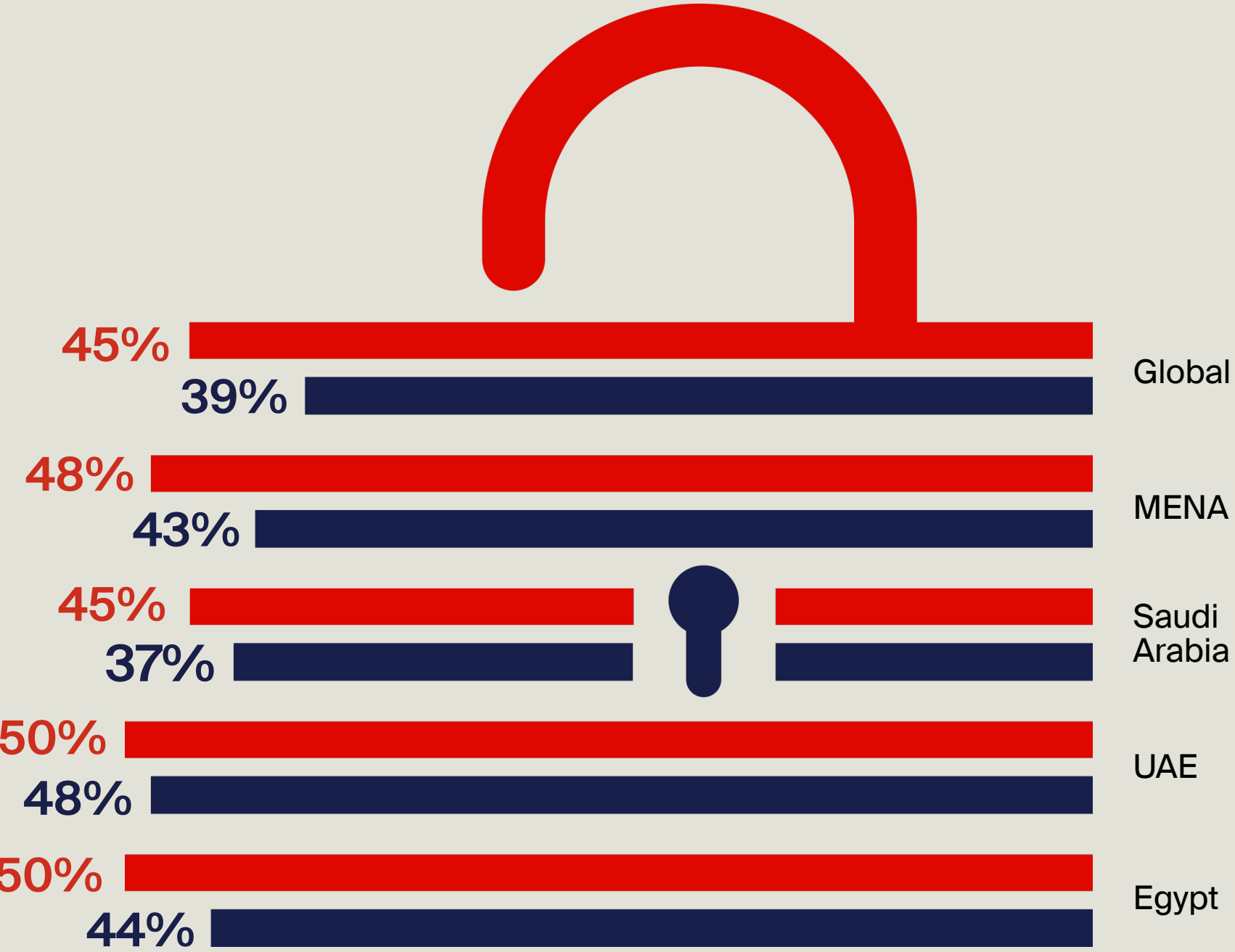
The transition from legacy systems to cloud infrastructure has amplified data risks while increasing cyber threats have turned security into a board-level priority. Without proactive measures, these challenges risk slowing innovation, leaving organisations struggling to compete.

But by integrating robust governance practices into their operating models and collaborating with policymakers, businesses can ensure Responsible AI becomes a growth catalyst.

To lead the way in AI, organisations must establish a robust but adaptive Responsible AI framework, that guides development and deployment at every stage, and implement an AI governance platform that enables organisations to monitor, audit, and refine AI systems in real-time, ensuring ethical practices, transparency, and accountability across all operations.

CEOs should proactively collaborate with policymakers to shape regulations that balance growth and risk, integrate regulatory expertise into AI strategies and frameworks for future-proof compliance.

Data privacy and regulatory compliance are leading barriers to GenAI adoption both regionally and globally



Privacy of data and information Regulation and/or compliance



# Top AI priorities for MENA CEOs

## 5 Harness public sector momentum to drive ecosystem growth

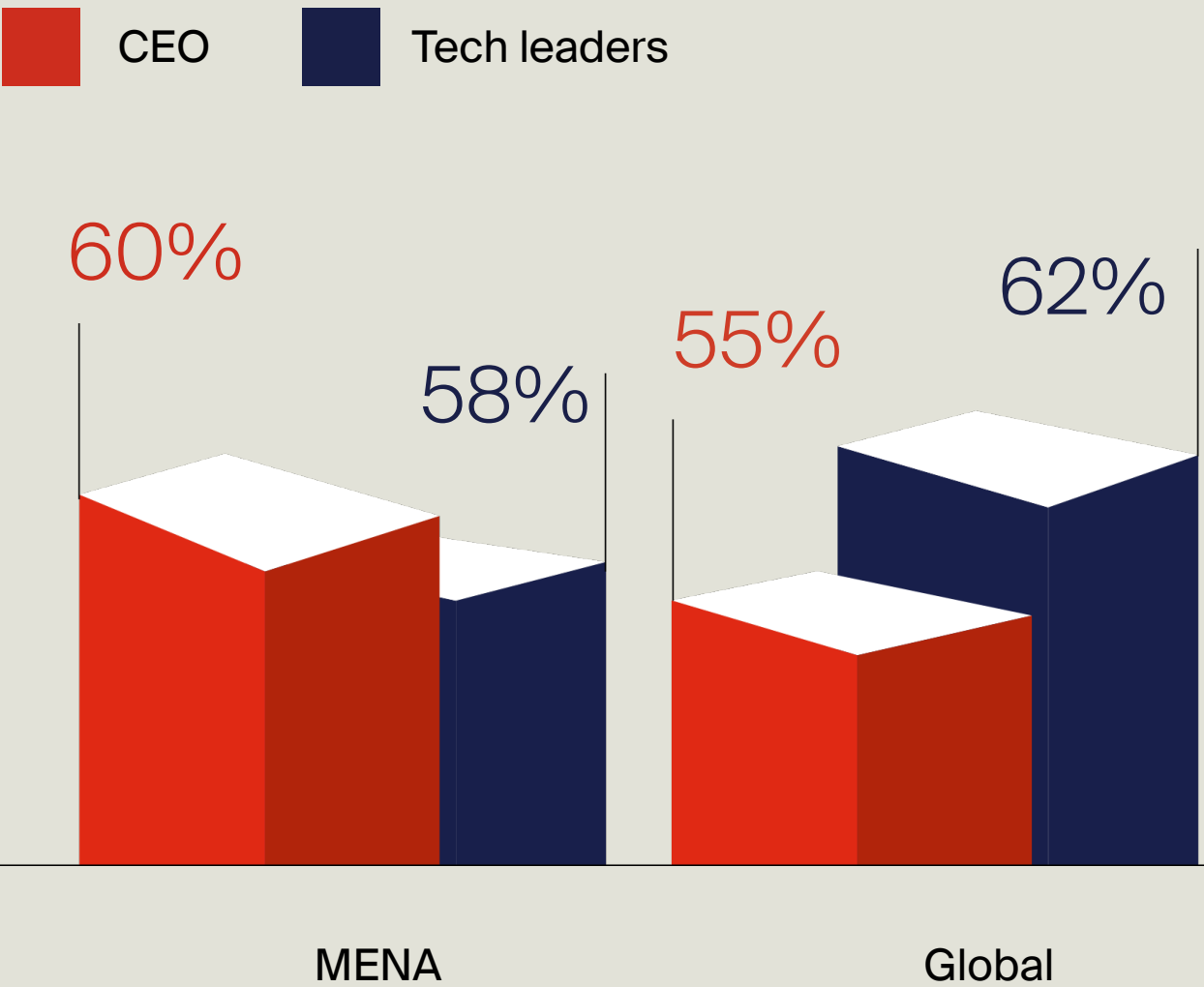
Establishing a thriving AI ecosystem is vital as the MENA region positions to cross a wider gap from legacy to AI-led innovation without compromising on pace.

This transformation is powered by national AI programs, with governments being both the architects and accelerators through ambitious, strategic initiatives. For example, the UAE National AI Strategy<sup>15</sup> aims to make the UAE a global AI leader by 2031, Saudi Arabia’s National Strategy for Data & AI<sup>16</sup> outlines a roadmap for widespread adoption and development, and Egypt’s National AI Strategy<sup>17</sup> emphasises capacity building and research to accelerate progress.

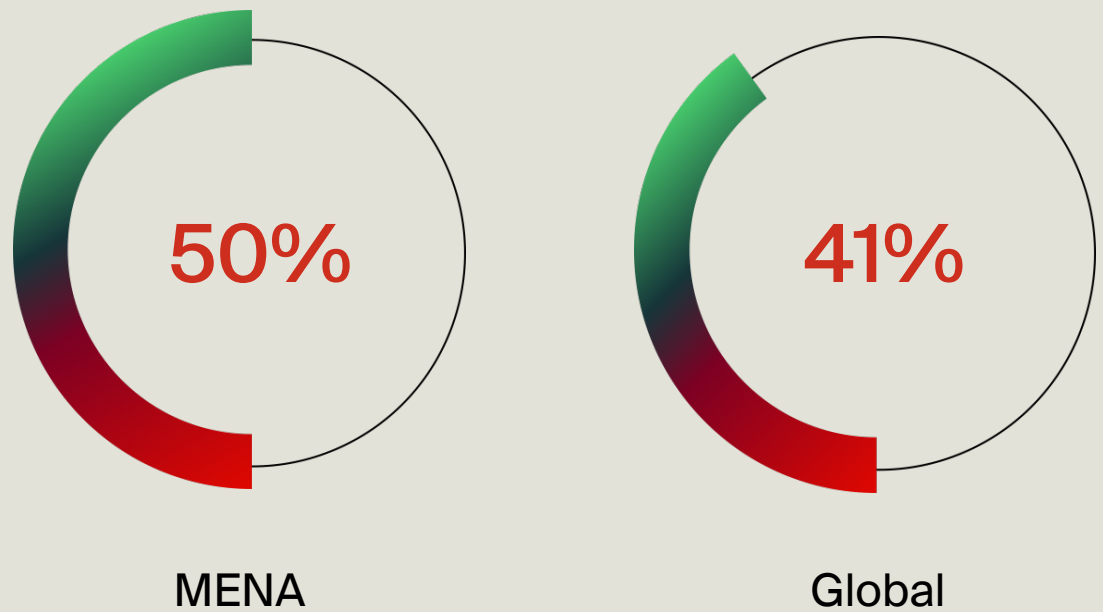
Public-Private Partnerships (PPPs) have already united global technology leaders, local innovators, and policymakers, driving forward a collective vision of AI-powered growth.

But here’s the catch: even the best infrastructure and plans can falter if the ecosystem doesn’t adapt quickly enough. MENA organisations must evolve their partnerships with agility and purpose. To sustain and amplify this momentum, MENA organisations need to rethink their partnership strategies, forging alliances that are closely aligned with both their business objectives and long-term vision. Achieving success in AI demands purposeful collaboration with like-minded, best-in-class stakeholders to ensure efforts are cohesive, impactful, and transformative rather than transactional.

## CEOs and tech leaders plan to reconfigure core business partnerships



## Breaking down barriers: CEOs identify resistance to change from ecosystem partners as a major innovation challenge



**In the MENA region, 60% of CEOs are planning to reconfigure their partnership strategies, slightly outpacing the global average of 55%.** This approach is especially critical considering resistance to change from ecosystem partners as one of the biggest barriers to innovation in the region. 50% of CEOs in the MENA region vs 41% globally, cite this reluctance as a key barrier to innovation. **The rapid pace of technological advancement is not only testing the resilience and adaptability of organisations in MENA, but also placing immense pressure on their ecosystem partners, who are struggling to keep pace with the evolving demands of their customers.**

Collaboration is the game-changer for AI success. Governments in MENA have laid the groundwork with bold investments, but the real impact lies in how organisations leverage these opportunities. Siloes breed bias, while collaboration expands horizons, making AI more inclusive and effective. Public-Private Partnerships (PPPs) have shown that by joining forces with agile, specialised players, organisations can fast-track innovation, boost resilience, and future-proof their ecosystems.

[15] UAE National Strategy for Artificial Intelligence 2031. 2018.  
[16] National Strategy for Data & AI,  
[17] Egypt National Artificial Intelligence Strategy. July 2021.



## Seizing the AI opportunity: Imperatives for MENA CEOs

In a world driven by relentless technological change, staying still is the riskiest move of all.

AI presents an opportunity to gain a competitive advantage, but success demands boldness, agility, and clarity. This starts with an honest assessment of where your organisation stands today—its tech-readiness, market position, and skills gap. By facing these realities head-on, MENA CEOs can turn challenges into strengths, ensuring their teams are prepared to seize the moment. The days of playing it safe with rigid long-term plans are over; ‘Pivot, perfect, and scale’ should be the mantra. CEOs can drive this transformation by focusing on four key imperatives:



1

### **Leadership alignment:**

Shift mindset with cohesion at the top

AI integration isn’t a solo endeavour, it requires entire leadership—CEO, CTO, CFO, and other leaders—to work in lockstep. Synchronise business ambitions with technology capabilities and financial realities. Establish clear objectives, realistic targets, and balanced investment frameworks to drive adaptive decision-making that is both bold and calculated. This would inject agility to pivot as priorities shift and accelerate AI adoption as opportunities arise.



2

### **Integrated strategy:**

Connect the data, infrastructure, and talent dots

When planning for rapidly evolving technology, AI strategy needs to be a fully integrated roadmap, across infra, data, and talent, responsive to tech advancements, evolving regulations, and shifting market demands. This starts with linking infrastructure and data needs to business strategy, connecting the dots early and aiming for a tech stack that’s adaptive to strategic and regulatory needs. Then, align talent to address toughest challenges and give them the guidance and clarity of purpose to succeed.



3

### **Operational excellence:**

Balance quick wins with sustainable growth

In the high-stakes race to leverage AI, execution is everything. Focus on flawless, timely execution to deliver quick wins while never losing sight of long-term goals. This requires clarity on whether to build capabilities internally or adopt ready-made solutions. Prioritise use cases that deliver rapid results to build momentum, and empower employees to make agile, informed decisions, setting a foundation for scalable success.



4

### **Reconfigure partnerships:**

Build on public sector investments to power ecosystem-wide growth

AI’s transformative power is magnified within collaborative ecosystems where data flows freely, infrastructure supports scalability, and partnerships innovate and deploy effectively. Public sector investments in AI and digital infrastructure create a strong foundation for scaling innovation. By building on these government-led initiatives, private-sector leaders can expand into broader value networks, driving innovation, efficiency, and impact. To scale faster and lead decisively, partner with tech pioneers, governments, regulatory bodies, educational hubs, financial backers, and burgeoning startups to stimulate groundbreaking ideas and cultivate a robust talent base.



# Methodology

This report is based on a comprehensive research methodology that combined quantitative and qualitative research techniques to compare findings from senior executives globally and in the MENA region, specifically the UAE, Saudi Arabia, and Egypt.

The IBM Institute for Business Value (IBM IBV), in collaboration with Oxford Economics, conducted two rounds of survey-based interviews with over 3,000 CEOs and 2,500 C-suite technology leaders, including Chief Technology Officers (CTOs), Chief Information Officers (CIOs), and Chief Data Officers (CDOs). Executives represented more than 30 countries and 26 industries and included 149 CEOs and 149 C-suite technology leaders from across the UAE, Saudi Arabia, and Egypt. The primary phase of surveys for both groups, conducted between December 2023 and April 2024, focused on leadership, technology, talent, industry disruption, and emerging enterprise strategies with an emphasis on the role of AI-driven technologies.

e& and IBM IBV then analysed global and regional IBM IBV survey data to further explore insights specific to the MENA region. e& supplemented and strengthened findings by conducting deep-dive qualitative interviews with six CEOs and policymakers from the UAE, Saudi Arabia, and Egypt to capture current regional perspectives and to highlight rapidly changing industry trends in the MENA region.

This approach ensured a robust analysis of evolving business priorities, technological transformation, and leadership dynamics across the global and regional levels.

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CEO Study

## **MENA's AI advantage**

Opportunity to leap  
ahead and lead

Middle East and North Africa perspective

In collaboration with

