

IDC MarketScape: Gulf Countries AI Professional Services 2025 Vendor Assessment

Melih Murat

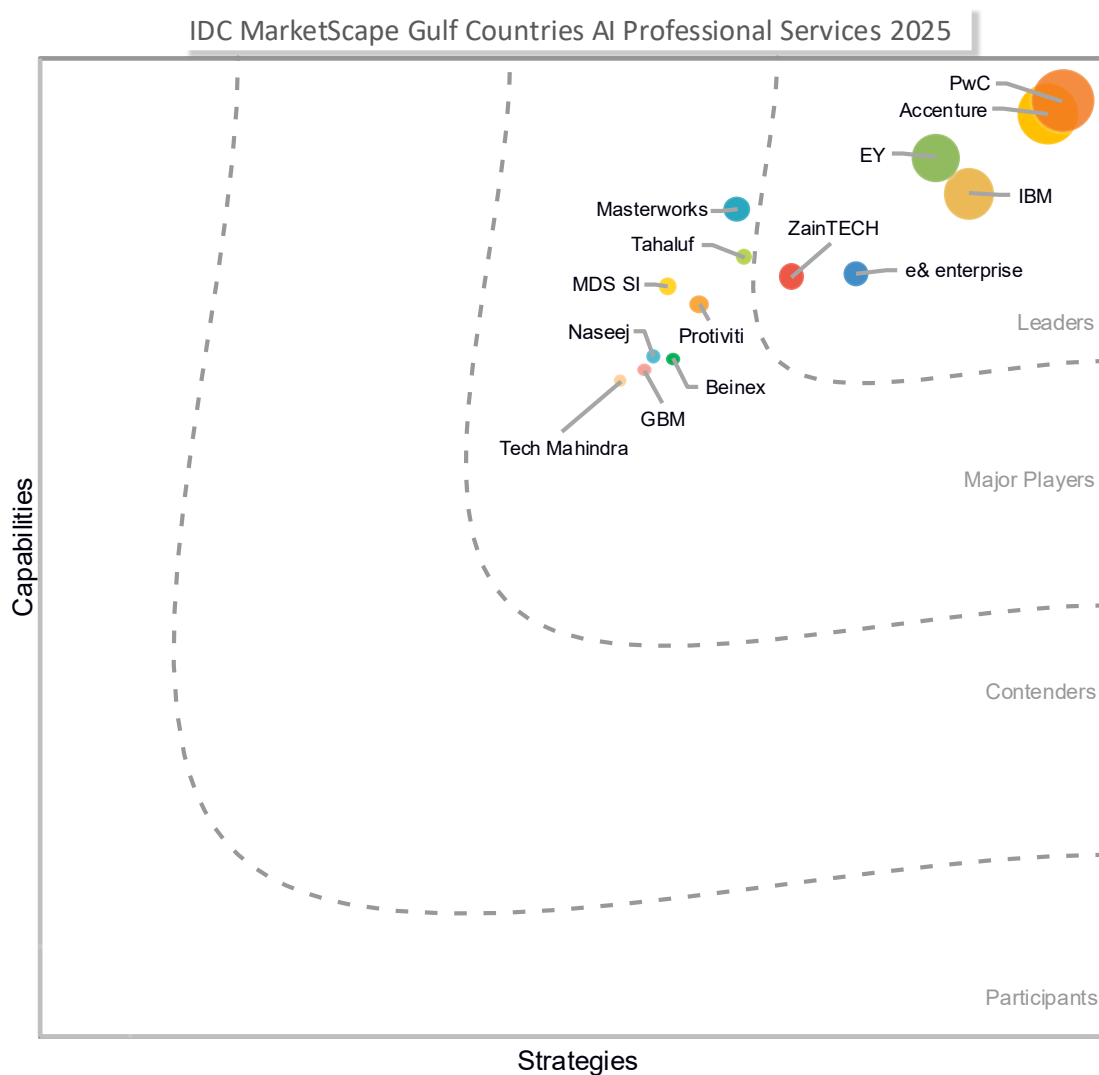
Eric Samuel

Mufasir Yousuf

IDC MARKETScape FIGURE

FIGURE 1

IDC MarketScape Gulf Countries AI Professional Services Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

IDC OPINION

This IDC study provides a vendor assessment of the 2025 Gulf Cooperation Council (GCC) artificial intelligence professional services market using the IDC MarketScape model. This is the first time IDC has conducted a regional assessment of this market, and it comes as an extension of the global assessment completed in 2025. The regional assessment leverages a framework used in the global version. Unlike the global assessment, the regional analysis excludes business and managed services, focusing solely on IT project and support services while assessing the professional service capabilities of providers in the GCC.

A key trend highlighted in this IDC MarketScape is the accelerated growth of the AI professional services market in the GCC, driven by organizations positioning AI as a core pillar of their digital transformation agendas. Enterprises are moving beyond isolated, proof-of-concept (POC) initiatives toward embedding AI within core business processes and workflows, supported by rising budgets and an increasing preference for consulting-driven professional services engagements. A major driver of this momentum is the surge in generative AI (GenAI) adoption, with businesses exploring how they can capitalize on this emerging AI technology and experimenting with custom foundational models tailored to specific needs, such as customer service and knowledge management. While the use of advanced agentic AI is still nascent, interest is expanding rapidly as organizations recognize its potential to transform front-line operations.

At the same time, concerns over compliance, data privacy, and sovereignty play a crucial role in shaping deployment strategies, leading to a preference for on-premises or sovereign cloud setups and the establishment of robust governance frameworks to monitor and manage AI models effectively. However, talent availability remains a critical obstacle. The shortage of AI and data science professionals across the region is prompting organizations to invest in upskilling existing employees while leaning heavily on external service providers to deliver the expertise required. This dynamic has solidified the role of professional services firms as enablers of enterprise AI adoption.

Industry-specific demand is also shaping the market, with government and financial services leading the way in terms of large-scale deployments, while the healthcare, telecommunications, transportation, oil and gas, and retail sectors are creating further opportunities for bespoke AI applications. Across all sectors, seamless integration with existing enterprise systems has become vital, with businesses emphasizing interoperability, application programming interface (API)-driven approaches, and effective data pipeline management across hybrid and multicloud environments to ensure that AI adoption can scale effectively.

Crucially, organizations are now demanding tangible business outcomes from their AI investments, no longer satisfied with experimentation alone. Demonstrable ROI and proven use cases are becoming the primary benchmarks for success, resulting in a shift toward production-ready solutions that deliver measurable efficiency, cost savings, and improved customer engagement. Vendor selection is increasingly guided by a preference for regional partners that can combine technical expertise with deep industry knowledge and a commitment to long-term collaboration. Collectively, these dynamics are establishing the GCC AI professional services market as one characterized by strategic, scaled, and value-driven adoption, underpinned by a strong emphasis on governance, measurable impact, and sustainable growth.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

This research includes analysis of AI services providers with regional scale and broad portfolios spanning IDC's research coverage of the AI professional services market. In determining the group of vendors for analysis in this IDC MarketScape, IDC considered the following set of inclusion criteria:

- The services provider's portfolio should include at least three of the following services that are specifically designed to deliver data-driven and AI-enabled solutions:
 - IT consulting and advisory
 - Custom application development
 - Technology customization
 - Deployment
 - Integration
 - Day 2 support services
- The services provider should have clients participating in AI-embedded technology services projects and must have generated revenue in CY23 and CY24 within the GCC. The term "AI-embedded technology services projects" refers to any type of project that involves multiple technology components where AI is the core component of the project (i.e., if the AI component was removed, the solution would cease to exist).
- Data life-cycle services tied to the AI strategies of a provider's customers were also factored in as part of the assessment.
- The services provider should have capabilities in three of the following six competency areas for delivering AI professional services:
 - Data architecture/pipeline engineering/DataOps
 - AI/ML/Data science
 - ML engineering/MLOps
 - AI cloud management

- AI security/governance
- Training
- Software development/DevOps
- The services provider is required to have a local office for AI services in at least one of the six GCC countries (Saudi Arabia, the UAE, Oman, Bahrain, Kuwait, and Qatar) as well as in-country presales and delivery capabilities in at least one of the aforementioned countries.

ADVICE FOR TECHNOLOGY BUYERS

- Prioritize industry-specific solutions by tailoring offerings around local regulatory needs, language, and sector pain points. This will drive differentiation and deeper client trust in highly competitive, rapidly evolving GCC markets.
- Strike the right balance between scalable, replicable use cases and bespoke, high-customization solutions, as modular solutions enable rapid value delivery and cross-industry adoption, while highly tailored builds drive deeper transformation and command premium pricing.
- Adopt an AI platform-centric value delivery approach, as this enables unified orchestration, life-cycle management, and compliance across rapidly proliferating use cases and agents. It is also key to scaling, governing, and continuously improving intelligent systems in dynamic GCC enterprises.
- Build and continuously invest in AI skills development and change management programs, not only for internal teams but also for client organizations, to accelerate sustainable adoption and value realization from AI engagements.
- Foster ecosystem partnerships across technology vendors, academia, and regional authorities; co-innovate on responsible AI frameworks, sovereignty, and compliance to gain an early-mover advantage and influence policy direction.
- Implement flexible engagement and pricing models — such as modular delivery, outcome-based contracts, and managed services — to align with buyers' evolving digital maturity, reduce adoption risk, and create opportunities for recurring value expansion.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and opportunities.

Accenture

Accenture is positioned in the Leaders category of this 2025 IDC MarketScape for GCC AI professional services.

Accenture is a well-established provider of AI professional services in the GCC region, delivering a portfolio that spans consulting, implementation, integration, platform engineering, and talent enablement. The firm operates a hybrid onshore/offshore delivery model with a focused regional presence in Saudi Arabia, the UAE, Qatar, and Oman, reinforced by access to global centers and engineering hubs. Accenture's platform-centric approach distinguishes its engagements, leveraging proprietary tools and responsible AI frameworks to ensure scalable, enterprise-grade deployments across generative, predictive, and interpretive AI capabilities. The company's AI Factory approach emphasizes end-to-end life-cycle support, from strategy formation and talent upskilling to platform integration and the development of agentic workflows. Accenture engages in co-innovation and collaborative initiatives with academia, technology partners, and customers to build and implement sovereign solutions.

The company has shown particular strength in supporting transformational programs across both the public and private sectors, often operating in close partnership with ministries and boards while maintaining industry depth in energy, finance, government, and retail. Accenture's regional delivery incorporates a high proportion of intellectual property (IP)-based and automation-driven services, a factor that underpins its capacity to scale and adapt complex solutions for both flagship and greenfield clients. Its extensive investment in upskilling and local talent development — through mechanisms like its AI Academy and tailored learning platforms — aligns with the region's national digital transformation efforts and workforce priorities. In terms of governance, the company integrates responsible and ethical AI principles, supporting regulatory and policy frameworks for government and enterprise clients. Accenture's go-to-market strategy combines dedicated sales and business development teams, an ecosystem partner network, and innovation-led client engagement supported by repeatable frameworks and modular integration capabilities.

Strengths

Accenture demonstrates strong platform-centric AI delivery using proprietary tools, comprehensive regional studios, and established AI frameworks and use case libraries. Its consistent investment in local talent and co-innovation centers helps Accenture align solutions to national priorities and supports robust end-to-end life-cycle delivery across both the public and private sectors.

Challenges

Accenture's highly integrated and platform-led approach, underpinned by a POC- and minimal viable product (MVP)-based approach, is more suitable for clients that

are looking for comprehensive transformation programs. However, this potentially limits the flexibility required by organizations seeking narrowly scoped AI solutions. While Accenture has strong change management capabilities, these should be given greater emphasis, as the company frequently works on greenfield engagements.

Consider Accenture When

Accenture should be considered when organizations are pursuing large-scale, enterprise-wide AI initiatives that require both regional expertise and access to global technology platforms — especially where organizational transformation, talent development and enablement, responsible AI, and the orchestration of complex AI-enabled workflows are strategic priorities.

Beinex

Beinex is positioned in the Major Players category of this 2025 IDC MarketScape for GCC AI professional services.

Beinex is an established regional AI professional services provider with customers across the UAE, Saudi Arabia, Kuwait, Bahrain, and Qatar. The company has built its practice around a consultative approach that begins with comprehensive AI readiness assessments and evolves into full-scale implementation projects. Beinex is recognized as the first Snowflake Services Premier Partner in the region and a Microsoft Solutions Partner for Data & AI.

Beinex has a strong services portfolio, possesses strong functional capabilities, and has been expanding its industry capabilities, particularly in healthcare, financial services, and government sectors. The company's AI services portfolio spans advisory development, integration, implementation, and managed services across GenAI solutions, machine learning, and agentic AI.

Beinex maintains a library of AI use cases across different verticals and business functions, which serves as the foundation for its advisory engagements. The company places an emphasis on identifying gaps across people, process, data, and technology dimensions before developing transformation and implementation road maps.

Beinex operates through a land-and-expand strategy, typically starting with single use cases and progressively scaling to comprehensive AI transformation programs. The company has developed proprietary frameworks for AI governance and maintains an internal research and development (R&D) division focused on POC development and emerging technology testing. Its delivery model combines onsite consultants with offshore development centers to provide cost-effective implementation services.

Strengths

Beinex demonstrates strong client retention and relationship management capabilities, with long-term engagements spanning multiple years. The company's approach to AI advisory services includes gap analysis and use case prioritization frameworks that help clients develop realistic AI implementation road maps. Beinex has built solid technical capabilities in agentic AI implementations, demonstrated through complex automation projects that integrate multiple AI technologies. Beinex's technology-based expansion strategy incorporates initiatives aimed at developing more strategic, business-oriented capabilities.

Challenges

Beinex's advisory capabilities are not consistently recognized by all clients as a core differentiator. While it possesses very strong technical capabilities, Beinex's approach has traditionally been more tactical and client driven than proactive and strategic. However, this has been changing in a positive direction over the past two years, as the company has already started leveraging its advisory capabilities to drive more strategic life-cycle engagements with clients. Beinex could also consider promoting its advisory and industry AI capabilities based on a structured marketing communications plan.

Consider Beinex When

Beinex is ideal for organizations seeking strong technical execution in AI and data platform implementations and custom solution/product development. The company is well suited for clients seeking technology-focused AI implementations where business requirements are clearly defined and technical execution excellence is prioritized. Organizations should also consider Beinex when seeking an AI professional services provider with a deep understanding of GCC regulatory requirements and data sovereignty needs.

e& enterprise

e& enterprise is positioned in the Leaders category of this 2025 IDC MarketScape for GCC AI professional services.

e& enterprise is a key pillar of the broader e& group ecosystem and a recognized provider of data and AI services in the region. Working alongside other specialized business units within the company (i.e., Internet of Things [IoT], cybersecurity, cloud and digital infrastructure, and outsourcing), e& enterprise's data and AI division leverages cross-unit synergies to develop integrated, cross-domain solutions, such as AI-powered security assessments. The company serves multiple industries such as financial services, retail, telecommunications, and the public sector. With over 250 AI/ML models deployed and 200+ use cases developed, e& enterprise offers an integrated portfolio spanning the entire AI value chain, from connectivity and infrastructure to platforms and devices. These capabilities enable e& enterprise to

design and deliver end-to-end sovereign use cases, such as GenAI-driven solutions tailored to Arabic language requirements.

The company's data and AI practice emerged through the strategic consolidation of previously distributed AI capabilities across various group entities, creating a centralized center of excellence (COE) with dedicated teams for data management, AI solution development and implementation, and technology R&D. The company offers a wide range of AI-related professional services, including consulting, design, development, delivery, and support services. e& enterprise embraces a client-first approach, prioritizing solutions based on customer demand, maturity, and proven business value.

Its comprehensive service portfolio is underpinned by AI accelerators and packaged AI solutions (e.g., AI-in-a-Box for rapid adoption, Agentic AI Platform for automation, and sector-specific copilots). The company has developed various proprietary frameworks, including a maturity assessment framework, an AI use case prioritization matrix, a responsible AI framework, and governance-as-a-service solutions that address data governance, AI governance, and reliability requirements. Its technology-agnostic approach supports multiple hyperscaler platforms while emphasizing sovereign and secure deployment options through partnerships.

e& enterprise's go-to-market strategy leverages both organic growth and strategic acquisitions, with an established presence in the UAE, Egypt, Saudi Arabia, Morocco, Serbia, and Hungary. The company leverages strategic technology partnerships with companies such as AWS, Intel, Dell, Amdocs, and NVIDIA, and it has achieved trusted partner status with significant government and private sector entities. Its AI Academy initiative provides executive education and thought leadership for different types of audiences, such as chief AI officers, while its strategic technology partnerships enable co-innovation and co-development opportunities.

Strengths

e& enterprise offers full-stack AI technology capabilities from AI connectivity to devices, providing sovereign solutions. Its established use case factory, tested within the e& group ecosystem, demonstrates proven business value. Its strong local presence with high in-country value performance and government partnerships provide advantageous positioning for regional clients seeking data sovereignty and regulatory compliance through a technology consulting-led approach. e& enterprise's AI Academy and its extended Chief AI Officer Program are also important differentiators for the company.

Challenges

e& enterprise's rapid expansion from its telco origins to a provider that delivers cross-industry solutions may generate temporary integration challenges. As a company positioning itself as a provider of end-to-end AI services, e& enterprise

could invest further in its business-centric advisory services or position its existing consulting partners more effectively.

Consider e& enterprise When

Organizations should consider e& enterprise when requiring comprehensive AI transformation with an emphasis on data sovereignty and regional compliance. The company excels in government and highly regulated industry engagements where local presence and security requirements are paramount. e& enterprise is particularly suitable for clients seeking end-to-end sovereign AI implementations with a wide range of customization requirements.

EY

EY is positioned in the Leaders category of this 2025 IDC MarketScape for GCC AI professional services.

EY has a comprehensive AI services presence in the GCC region through its integrated business and technology consulting capabilities. EY's integrated offering methodology draws on the company's strong business and technology consulting capabilities, leveraging Parthenon (one of EY's global service lines) for technology delivery alongside local partners on a case-by-case basis. EY maintains a relatively focused approach, primarily targeting the government, finance, and energy sectors, with functional capabilities supported by strong management consulting capabilities and more strategic engagements, though with smaller market coverage.

EY's delivery is supported by a mix of onshore teams, nearshore centers in Egypt and Jordan, and substantial offshore resources, all enabled through ring-fenced and regionally dedicated teams. This distributed yet unified delivery model enables cost efficiency and access to a broad talent pool, including Arabic-speaking and globally certified AI professionals. EY's offer emphasizes end-to-end engagement, with industry delivery teams integrating subject matter expertise from business consulting, people consulting, technology, and risk and compliance functions.

The firm works closely with global technology partners, leveraging alliances for advanced solutions and orchestration across cloud, data, and AI platforms. The firm has a strong track record in serving mature organizations, particularly in government, finance, and energy, and has taken an active advisory role in regulatory engagements and AI policy development across the GCC. EY's approach to AI professional services is market specific and business led, focusing on value realization, use case factory models, and operational transformation, underpinned by internal knowledge libraries and responsible AI frameworks.

Strengths

EY's practice offers integrated consulting and delivery, a strong local and nearshore presence, and deep experience in embedding AI across business functions. The firm

demonstrates strong management consulting capabilities with functional expertise, enabling more strategic engagements and high-end engagements. EY's client mapping and requirement analysis capabilities are quite strong, with the company embracing a structured approach to engagement model development. The firm demonstrates strong practice capabilities with big investments and hiring plans. EY's use of proprietary platforms and focus on agentic and generative AI solutions enable consistency, scalability, and sector-aligned transformation.

Challenges

EY's comprehensive approach may be exhausting for clients seeking quick solutions, as the company invests significant time trying to understand all details about the customer environment and business models. The company's marketing practice in the GCC region is evolving based on ongoing capability-building activities. While engineering capabilities and horizontal use cases are available, regional examples covering these areas should be promoted more through different marketing channels.

Consider EY When

EY is ideal for organizations seeking comprehensive AI transformation partnerships with strong integration of business and technology consulting capabilities, particularly for large-scale, strategic engagements across regulated industries. Consider EY for projects requiring extensive discovery, workshop-based approaches, and detailed client mapping with structured engagement model development, especially where regulatory compliance and risk management are critical components. The firm excels for clients needing deep engagement approaches with strong change management practices and regulatory partnerships. EY is well suited for milestone-based, transformative engagements where a comprehensive understanding of the customer environment and business models is valued over rapid deployment timelines.

GBM

GBM is positioned in the Major Players category of this 2025 IDC MarketScape for GCC AI professional services.

GBM (Gulf Business Machines) is a regional technology provider serving the Middle East with over 35 years of experience, operating across the UAE, Kuwait, Oman, Bahrain, and Qatar from its Dubai headquarters. The company positions itself as an end-to-end systems integrator partner for enterprise customers, offering comprehensive AI professional services through its structured three-layer framework covering infrastructure, platform, and solutions with services.

GBM's AI framework begins at the solutions layer, where it delivers industry-specific applications, custom-developed solutions, and accelerators underpinned by consultancy, implementation, and managed services. The company is actively

expanding its AI use case libraries across industries such as banking, the public sector, retail, healthcare, telecommunications, and manufacturing, while also broadening its functional coverage to include HR, customer service, marketing, risk and compliance, and finance. At the platform level, GBM focuses on data integration and quality, offering AI capabilities that span traditional machine learning to generative AI. This layer is reinforced by robust security and governance frameworks, ensuring responsible and scalable AI adoption. The infrastructure layer underpins the entire framework, providing compute, storage, and networking components optimized for AI workloads. These capabilities support both on-premises and cloud deployments, enabled through strategic partnerships with established technology vendors.

The company's consultancy approach targets customers at different AI maturity levels, from awareness through transformation phases. For early-stage clients, GBM provides use case discovery, strategy development, and pilot implementations. For mature organizations, the focus shifts to AI governance and enterprise-wide scaling. This consultancy-led engagement model encompasses data assessment, AI exploration services, and security advisory capabilities delivered through focused, outcome-driven engagements.

GBM has developed proprietary solutions such as CloudX for AI-powered cloud management and the Cor platform for managed security services with embedded AI capabilities. These in-house platforms demonstrate the company's approach of infusing AI into service delivery while providing AI solutions to customers. The company maintains an AI Squad across its regional branches to align expertise, share knowledge, and collaborate on solution development.

Customer engagements span multiple industries with notable implementations including data and AI COEs for public sector entities, AI assistants for government portals, and governance frameworks for large telecommunications operators. GBM's approach emphasizes building long-term partnerships through consultancy-led relationships, often extending initial pilot projects into comprehensive multi-year AI transformation programs.

Strengths

GBM offers end-to-end AI capabilities spanning infrastructure, platforms, and applications with a strong regional presence and established enterprise relationships. The company's consultancy-led approach effectively addresses different customer maturity levels while proprietary solutions like CloudX and Cor demonstrate practical AI integrations. GBM's strong partnerships enable comprehensive technology coverage with flexible deployment options.

Challenges

The company's current approach remains primarily relationship driven. Limited deep domain expertise may restrict GBM from independently having business-led

conversations with senior executives. GBM is still in the early stages of building demo labs in the region. The company is still relying on key technology partners to co-create joint AI solutions for clients.

Consider GBM When

Consider GBM when seeking established regional expertise with proven enterprise relationships across the Gulf countries. The company suits organizations requiring comprehensive AI transformation support spanning infrastructure, platforms, and applications with a strong emphasis on governance and security frameworks. GBM is well positioned to support customers with integrated solutions that combine proven cross-industry and functional use cases with cloud, security, and AI capabilities.

IBM

IBM is positioned in the Leaders category of this 2025 IDC MarketScape for GCC AI professional services.

IBM has established a strong regional presence in the Middle East with comprehensive AI transformation capabilities. IBM's consulting-led approach is underpinned by a comprehensive platform, hybrid and multicloud infrastructure, and field-proven regional capabilities featuring industry-specific functional expertise.

IBM has a broad and evolving presence in the GCC AI professional services landscape, underpinned by a hybrid go-to-market strategy that leverages a combination of global expertise, nearshore delivery, and in-country support anchored in Saudi Arabia and the UAE. The firm's approach is characterized by a deep vertical industry focus — with demonstrated traction in the public, energy, and telecommunications sectors, and in other growth areas such as sports and sustainability — and a delivery model that combines sector-specialist teams and technology-led consulting. IBM maintains innovation centers across the region, including Abu Dhabi's IBM Innovation and Industry Client Centre, Dubai's Industry and Innovation Centre, and the newly launched Riyadh Software Lab. The latter is staffed by a workforce of 70% Saudi nationals, demonstrating a commitment to local talent development and co-innovation.

IBM engages with key customers at the C-suite level and focuses on understanding business pain points and priorities to help transform clients into long-term trusted transformation partners. Its approach covers both greenfield projects — where it helps to create technology-enabled enterprises — and brownfield projects involving modernization and AI infusion, emphasizing transformative benefits rather than incremental benefits through IBM Garage methodologies, with multi-year engagements featuring several milestones.

IBM leverages robust partnerships with recognized hyperscalers, infrastructure providers, and regional entities to enable co-developed solutions that align with

national sovereignty requirements and digital transformation agendas. The company's practice emphasizes value realization beyond individual use cases, delivering structured change management, business process redesign, and ongoing enablement tailored to varying client AI maturity levels.

Strengths

IBM demonstrates strong C-level engagement with account-level relationships, bringing in the right expertise when opportunities arise. The company possesses full-stack capabilities, with consulting tools serving as major differentiators. IBM offers strong technical capabilities in deploying AI solutions across hybrid cloud environments, leveraging a balanced mix of global resources and localized delivery. Its proven frameworks for AI life-cycle management, industry specialization, and in-house reusable assets allow the company to deliver scalable solutions and support national priorities for digital transformation and sovereignty in the GCC.

Challenges

IBM's approach is anchored in large-scale, multi-year digital transformation programs, which may not align with organizations seeking rapid pilot deployments or those with limited budgets. The company's pricing model is generally set in stone, mainly sticking to fixed-price and time-and-materials contracts. This can make it tough to offer flexible pricing options, especially when dealing with the strict procurement rules that characterize the GCC. However, in an attempt to better serve the market, IBM is open to exploring a new cost model that aligns with the changing market and evolving customer needs.

Consider IBM When

IBM is ideal for organizations seeking comprehensive, long-term AI transformation partnerships with strong C-level engagement and complex project requirements spanning multiple years. IBM is the right choice for customers in regulated, mission-critical industries that seek comprehensive, AI-driven transformation and place a premium on robust life-cycle management, seamless integration with existing enterprise infrastructure, and strict compliance with data sovereignty requirements. The company excels in scenarios requiring deep co-development approaches supported by change management practices.

Masterworks

Masterworks is positioned in the Major Players category of this 2025 IDC MarketScape for GCC AI professional services.

Masterworks is a Saudi technology company, specializing in data management and AI-driven digital transformation. Masterworks has obtained official accreditation from the Saudi Data and Artificial Intelligence Authority (SDAIA) as a certified AI service provider.

The company's approach is focused on platform-based and custom application development, customization, productization, integration, implementation, and managed services, with data platform and infrastructure capabilities sourced from third parties. Masterworks demonstrates strong capabilities across various sectors, including Smart Cities, transportation, and municipalities, while also maintaining private sector capabilities.

Masterworks' portfolio revolves around in-house-developed AI products and platforms, notably the Baseer suite, which includes modules for computer vision, large language model (LLM)-based knowledge retrieval, speech-to-text (STT), and domain-specific solutions such as turnaround management for airports and visual asset monitoring. The firm also has an AI subsidiary called Nabeh that is dedicated to providing a comprehensive AI solution ecosystem encompassing computer vision, large language models (LLMs), speech to text (STT), and a low-code/no-code AI platform. The delivery model leverages a blend of onshore, nearshore, and offshore talent.

The company invests in continuous internal R&D through its AI lab, which develops proprietary models and solutions, and promotes client co-innovation via workshops, AI labs, and rapid prototyping. Masterworks' go-to-market strategy is executed through direct engagements, industry workshops, and collaborations with technology providers. The company has established joint innovation labs for co-creation and co-innovation with key government entities.

Strengths

Masterworks possesses a strong proprietary IP-driven business model, with comprehensive platform capabilities that support governance, MLOps, and application innovation. The company's investment in ongoing AI R&D enables flexible customization through joint innovation labs and COEs. The company maintains customer centricity and demonstrates strong execution capabilities. Its local presence, combined with specialist roles focused on government, transportation, and public sector challenges, ensures sector-specific domain expertise.

Challenges

Masterworks demonstrates strong industry orientation and a highly customer-centric approach, yet opportunities remain to expand into more functional use cases in a more proactive manner. Some capabilities are distributed across sister companies, and enhancing cross-collaboration could unlock greater synergies. Increasing investment in marketing and thought leadership will be crucial for building broader awareness, reinforcing brand recognition, and driving the company's regional/global expansion strategy.

Consider Masterworks When

Masterworks is ideal for organizations seeking comprehensive platform-based AI solutions with strong in-house IP and customization capabilities. The company is particularly suitable for organizations requiring joint innovation lab approaches and co-development partnerships, especially in areas where it has proven depth and expertise. Masterworks excels in scenarios requiring alignment with Saudi national digital transformation objectives and regulatory compliance requirements, especially for clients that demand localized solutions.

MDS SI

MDS SI is positioned in the Major Players category of this 2025 IDC MarketScape for GCC AI professional services.

MDS SI stands out as a multi-subsidiary group with a breadth of expertise in the AI professional services market, operating primarily through its specialized entities — Magnoos, ICT Qatar, and LiveRoute. The group delivers an extensive portfolio of AI services, including AI strategy and transformation consulting, custom and GenAI solution development, advanced data engineering, MLOps and ModelOps, and process automation services. The group has achieved notable success across the government, banking, healthcare, telecom, utilities, and retail verticals. MDS SI's approach is characterized by offering end-to-end transformation by leveraging strengths distributed across group companies, ensuring that clients benefit from integrated governance, compliance, and industry-aligned AI implementations within a single engagement framework.

Technical differentiators include proprietary agentic AI architecture with autonomous agent orchestration, a homegrown AI orchestration platform, and specialization in Arabic language processing, which together address regional linguistic and regulatory requirements. Examples of industry-specific solutions include government digital transformation, banking risk and fraud analytics, and clinical healthcare AI, each architected to meet sector-specific priorities such as data sovereignty, compliance, and process optimization. The group also brings a technology-agnostic integration model, combining cloud and on-premises deployments to align with GCC data residency expectations and clients' evolving digital strategies.

MDS SI's COEs enable client-centric workshops, use case discovery, structured POCs, and knowledge transfer. Developing capabilities in agentic workflows, proprietary accelerators, and real-time decision platforms, MDS SI focuses on measurable business outcomes through a strong grounding in technical rigor, regulatory understanding, and localized delivery models to drive AI value realization across the GCC.

Strengths

MDS SI's ability to unify group-wide expertise under a harmonized go-to-market and delivery approach enables holistic AI transformation journeys. Its proprietary agentic AI orchestration platform, integration frameworks, and strong specialization in Arabic natural language processing (NLP) support robust, scalable deployments across highly regulated GCC sectors, with an emphasis on measurable client outcomes.

Challenges

MDS SI's engagements have primarily been driven by technology orientation and project-level customizations. That said, the company has started building business function domain depth and responsible AI governance capabilities. Overall, group synergies are being leveraged, but capabilities around integrated talent programs and thought leadership are still evolving.

Consider MDS SI When

Organizations can consider MDS SI when seeking an AI professional services provider capable of delivering integrated transformation across the GCC, with solid technology and custom solution development expertise, strong data sovereignty controls, proprietary orchestration tools, and the ability to draw upon broad subsidiary capabilities for complex, regulatory-driven projects.

Naseej

Naseej is positioned in the Major Players category of this 2025 IDC MarketScape for GCC AI professional services.

Naseej for Technology, established in 1989, is a technology solutions provider specializing in digital transformation for education, cultural institutions, and government business solutions across the GCC region, particularly Saudi Arabia, the UAE, Qatar, and Kuwait. The company has evolved from traditional systems integration to become an AI-focused provider with deep domain expertise in Arabic language processing and educational technology solutions.

Naseej has been expanding its focus toward AI-driven solutions, leveraging its established client base in the education and government sectors. Naseej's AI practice centers around its proprietary Medad platform ecosystem, which includes the Enterprise AI Studio and Experience Hub for no-code agent building and orchestration. Its flagship Arabic language model, Noon, demonstrates a commitment to sovereign AI capabilities, with version 2.0 — incorporating 20 billion parameters — set to be launched in early 2026.

The company operates innovation labs in Riyadh and Cairo that focus on developing AI capabilities tailored to its core market segments. The company's AI services portfolio includes enterprise AI platforms, LLM design and fine-tuning, Arabic

grammar correction systems, skills assessment engines, and other specialized solutions for educational institutions. Notable implementations include AI-powered virtual assistants for training management within government ministries, automated cataloging systems for libraries, and proctoring solutions for educational institutions. Examples of already deployed solutions include AI-based knowledge/document cataloging, university accreditation analytics, and an Arabic grammar error correction model.

Naseej leverages strategic partnerships for infrastructure, including collaborations with graphics processing unit (GPU) hosting providers and data platform vendors. The company maintains partnerships with Oracle Cloud Infrastructure for deployments across the UAE and Saudi Arabia, ensuring data residency compliance. Other examples of partnerships include Microsoft Azure/OpenAI, Google Cloud (Vertex AI/Kubeflow), NVIDIA, HuggingFace, and OmniOps. The company employs a customer-centric development methodology, working closely with clients to develop solutions that address sector-specific requirements. Naseej maintains partnerships with popular technology providers to deliver comprehensive AI implementations, though the company operates with a relatively focused team structure that enables agile delivery for specialized projects.

Strengths

Naseej brings a deep understanding of education and government sector requirements in the GCC region, allowing for deep specialization and tailored solution development. The company has developed strong technical capabilities in addressing Arabic language requirements, which represents an advantage in the region. Its customer-centric approach and established client base provide a solid foundation for AI solution delivery.

Challenges

Naseej's narrow industry focus may limit broader market expansion opportunities. The company's sales and marketing capabilities require strengthening to scale beyond relationship-driven approaches. That said, since 2024, the company has been investing in marketing, partner co-selling, and customer education (Naseej Academy webinars, partner joint sessions) capabilities to improve sales and marketing. The company's systematic approach to AI development and delivery could be further enhanced and structured.

Consider Naseej When

Naseej is well positioned for organizations seeking sovereign Arabic-language AI solutions in the education and government sectors and requiring a structured, customer-oriented approach. The company is particularly suitable for clients that value data residency, close collaboration, and customized sovereign solution development and deployment. Its R&D practice makes Naseej ideal for organizations

wanting to test and refine AI capabilities before full-scale deployment, particularly in specialized use cases within their core market segments.

Protiviti

Protiviti is positioned in the Major Players category of this 2025 IDC MarketScape for GCC AI professional services.

Protiviti has firmly established itself as a consulting-led provider of AI and data-driven solutions across the GCC. Its portfolio spans the full AI life cycle, from strategy and governance to implementation and operationalization, covering both traditional and generative AI. By combining deep business domain expertise with strong technical capabilities, Protiviti delivers tailored engagements across data strategy, data architecture, data management, business intelligence, visualization, and advanced analytics.

Protiviti applies industry-focused methodologies to deliver measurable business outcomes, with strength in regulated sectors such as financial services as well as government, energy, healthcare, real estate, and telecommunications. Its go-to-market approach is built on a consultative sales model, led by senior account executives and supported by domain specialists to ensure smooth execution. Engagements are shaped through solution design workshops and delivered via a hybrid operating model that integrates onshore expertise with nearshore and offshore resources in Egypt, Jordan, and India. This enables scalable, efficient, and locally compliant solutions. Strategic partnerships with global technology providers spanning major cloud and on-premises platforms further underpin Protiviti's capabilities in data, AI, analytics, and automation.

Protiviti offers flexible commercial engagement models tailored to each client's level of AI maturity. The firm has recently intensified its focus on strengthening AI strategy and governance frameworks, while actively ideating, designing, and developing GenAI use cases. It also supports organizations in achieving ISO 42001 compliance. Talent acquisition, skill development, and regional growth remain strategic priorities, demonstrated by investments in new office openings across the GCC and India, alongside ongoing reskilling initiatives throughout 2024 and beyond.

Strengths

Protiviti demonstrates strong capabilities in AI strategy and governance, effectively blending consulting-led approaches with deep domain knowledge and a mix of proprietary and partner technologies to achieve tangible results. Its adaptable hybrid delivery model, sector-specific expertise, and partner network support scalable solutions that meet regulatory and transformational requirements across the GCC region.

Challenges

Protiviti continues to address the challenge of enhancing regional market visibility and deepening local partnerships with cloud and AI vendors. While its delivery capabilities remain strong, further investment in collaborative go-to-market initiatives is key to unlocking larger transformational engagements and reinforcing its position as a regional innovator.

Consider Protiviti When

Choose Protiviti when your organization needs expert support for implementing complex AI projects, especially those involving multicloud environments, industry use case ideation and prioritization, AI governance, and risk management. Protiviti's consultative approach, regional expertise, and flexible engagement models position it among the key partners for driving impactful and measurable AI transformation.

PwC

PwC is positioned in the Leaders category of this 2025 IDC MarketScape for GCC AI professional services.

PwC Middle East has built comprehensive AI capabilities spanning the full technology life cycle, combining global expertise with a strong regional presence across the UAE, Saudi Arabia, Qatar, Jordan, and Egypt. PwC Middle East has partnered with OpenAI to become its first reseller in the region.

PwC delivers AI transformation programs covering the full life cycle — from ideation, value mapping, and readiness assessment to model development, change management, and deployment at scale — all structured to align with local regulatory environments and government agendas. PwC provides strategy consulting services to ensure alignment with local regulatory requirements (e.g., alignment with Saudi Arabia's SDAIA AI Adoption Framework), prioritize high-value use cases, develop business use cases, and demonstrate ROI. Its approach encompasses horizontal use cases that are industry oriented and enabled by capabilities spanning third-party tools alongside its proprietary platforms and frameworks.

PwC has a modular portfolio with reusable assets, enabling it to repeatedly deliver GenAI-enabled workflows, multi-agent solutions, and tailored industry use cases for sectors including government, financial services, healthcare, manufacturing, and energy. Strong alliances with global technology companies complement PwC's regional assets and support cloud and on-premises deployments as required.

PwC's go-to-market approach emphasizes sector-aligned management, direct executive engagement, and alignment with national digital transformation objectives, strengthened by a robust local talent pipeline and ongoing regional investment in AI skills development. PwC maintains COEs across Jordan, Egypt, the UAE, Saudi Arabia, and Qatar with ongoing investments and larger footprint

capabilities. The company is proactive in engaging customers at every level to eliminate bottlenecks in advance.

Strengths

As the first OpenAI reseller in the region, PwC has a strong market position, with local and sovereign models also forming part of its portfolio. It embraces a value-driven approach to technology transformation, supported by embedded responsible AI frameworks, and its capabilities are field-proven in the GCC market. PwC possesses a strong technology portfolio alongside platform capabilities, as well as formal partnerships with AI model providers. It has established a solid structure and integrated operating model across the leadership, sales, and delivery functions, accommodating different engagement models based on clients' maturity levels and requirements.

Challenges

PwC could position its change management and end-user enablement program more strongly across clients with limited AI maturity. While the complexity and breadth of PwC's offerings may result in longer scoping phases, such characteristics also reflect the firm's strong business domain expertise. This expertise could be communicated more explicitly as part of PwC's marketing communication initiatives.

Consider PwC When

PwC is ideal for organizations seeking comprehensive AI transformation with strong technical capabilities and full life-cycle implementation support. The firm is particularly well suited for clients requiring industry-oriented solutions with dedicated customization capabilities and a deep understanding of business processes and customer journeys. Its extensive regional presence across multiple GCC countries, supported by dedicated COEs, makes PwC ideal for large-scale, multi-country implementations requiring consistent service delivery.

Tahaluf

Tahaluf is positioned in the Major Players category of this 2025 IDC MarketScape for GCC AI professional services.

Tahaluf AI Emarat Technical Solutions, henceforth referred to as "Tahaluf," was established in 2015 and is headquartered in the UAE. It has evolved its portfolio toward a product-centric, engineering-led approach that integrates AI, IoT, and data management for public sector modernization and operational efficiency across the GCC and the wider Europe, Middle East, and Africa (EMEA) region. Tahaluf's service mix is anchored in IT consulting, infrastructure services, solution-driven platform development, systems integration, and support. The company's GCC focus is demonstrated through its coverage of domains such as Smart Cities, transportation, immigration, healthcare, and education, with capabilities spanning computer vision,

GenAI, NLP, information retrieval, and advanced analytics. Its strategy maximizes in-house IP through solutions such as its own IoT platform (Matixus), automotive plate recognition engine (Platego), mobility-based city inspection and parking inspection platforms (vAuto suite including vCity and vPark), know-your-customer/business (KYC/KYB) identity and compliance tools (including ICAO photo conformance and name matching), and semantic enterprise search. These solutions are complemented by tailored integrations with infrastructure, data, and AI platforms. Recognized for its strong deployment and customization skills, Tahaluf often leverages open source frameworks for region-specific requirements and develops tailored solutions where off-the-shelf alternatives fall short, particularly relating to language, culture, or regulatory needs. Tahaluf embraces a "client zero" approach, applying its own AI capabilities internally across all departments and empowering its solutions with AI, including its low-code and business process automation solution, Maestro Blocks.

Tahaluf's go-to-market execution combines direct engagement — using dedicated sales and presales teams in the UAE and Saudi Arabia — with a partner ecosystem (including global platform providers, regional resellers, and specialized software vendors) to penetrate regulated and public sector environments. The company maintains an R&D-based innovation approach, incrementally productizing proven client use cases and prioritizing modularity and reusability. Tahaluf maintains high standards of compliance and security, adhering to GDPR standards and holding multiple certifications (e.g., CMMI ML5, ISO 27001) for some of its flagship IPs. This approach emphasizes not just its strong local presence but also its focus on maintaining an international mindset.

Training and talent enablement are delivered via Tahaluf's proprietary education platform, "The Learning Hub," which supports client upskilling, graduate bootcamps, and internal capacity building. The delivery model is supported by an innovation center in Abu Dhabi that leverages physical demonstration and prototyping. Meanwhile, its business-led advisory services are typically supported by partners.

Strengths

Tahaluf demonstrates robust technical depth in adapting and implementing AI, data management, and IoT solutions for complex, region-specific requirements. Its strengths include scalable productized offerings, integration of open source and proprietary AI frameworks, and a pragmatic, modular engineering culture that accelerates deployment timelines and regional fit.

Challenges

Tahaluf's approach is focused on technical engineering and repeatable solutioning and relies on partners for business transformation advisory. This may constrain the depth of strategic engagement with the customer in cases where strategic advisory services will trigger foundational technology transformation.

Consider Tahaluf When

Consider Tahaluf for GCC public sector or regulated industry projects where purpose-built AI, data, or IoT solution development and deployment are required, particularly if the initiative demands in-region customization, compliance with localization requirements, or the integration of AI-driven operational platforms that are adaptable to evolving business and technical environments.

Tech Mahindra

Tech Mahindra is positioned in the Major Players category of this 2025 IDC MarketScape for GCC AI professional services.

Tech Mahindra is emerging as a notable player in the GCC AI professional services market by leveraging its strong regional presence and extending its global capabilities to the region. Tech Mahindra focuses on the telecommunications, oil and gas, government, transportation, construction, retail, and Smart Cities verticals, aligning its services with evolving client needs across both the public and private sectors. The company possesses a blend of consulting, implementation, and platform-driven services, supported by global and regional delivery models. Its consulting strengths combine deep domain expertise and robust technical capabilities to identify use cases that address clients' specific business requirements.

Tech Mahindra collaborates with business and technical stakeholders through design-thinking workshops to identify use cases and prioritize them using an MVP approach. Proprietary assets such as TechM Orion (an agentic AI orchestration platform), TechM Orion VerifAI (responsible AI validation), and TechM Orion amplifAler toolsets for IT operations and software life-cycle automation underpin its project delivery approach, enabling regionally compliant, secure, and scalable AI deployments. Notable innovations by Tech Mahindra in the region include small language models on the edge and autonomous operations. The company also supports clients in building COEs and developing data strategy projects, enabling a long-term AI adoption journey.

Tech Mahindra supports AI adoption at multiple maturity levels, from data and infrastructure consulting to the development of production-grade AI models and the operationalization of AI/GenAI-enabled use cases tailored to regional priorities such as data sovereignty and regulatory alignment. The company demonstrates a readiness to deliver both on-premises and cloud-based solutions, ensuring data protection and governance fit for GCC-specific regulatory environments. Tech Mahindra's suite of reusable frameworks, technical accelerators, and industry expertise has expanded to support the incremental adoption journey for AI in the region.

Strengths

Tech Mahindra leverages extensive technology capabilities and industry expertise, using modular frameworks and in-house platforms to deliver AI solutions customized to client needs. Depth in agentic AI, responsible AI practices, and industry-focused accelerators complement its consulting-led approach. The company's willingness to support both on-premises and cloud models strengthens its relevance in sensitive, regulated sectors.

Challenges

While expanding, Tech Mahindra's project and consulting references in the region are still concentrated in its anchor sectors, with relatively limited breadth beyond the marquee verticals of telecommunications, oil and gas, and government. While the company is rapidly expanding its local AI capabilities, it still needs greater market visibility and proof of impact.

Consider Tech Mahindra When

Consider Tech Mahindra when seeking an AI services partner that combines modular, industry-adaptable platforms and frameworks with an ability to deliver localized, compliant, and scalable AI solutions, especially where secure operations, agentic automation, and incremental AI modernization are key priorities.

ZainTECH

ZainTECH is positioned in the Leaders category of this 2025 IDC MarketScape for GCC AI professional services.

ZainTECH delivers AI-centric professional services to the GCC market through a dual go-to-market approach, blending industry-led value propositions with deep domain expertise and functional capabilities. The company's portfolio encompasses vertical solutions focused on identified high-priority verticals — predominantly BFSI, telecommunications, and the public sector — alongside horizontal and modular offerings, such as conversational AI, intelligent automation, and data privacy compliance accelerators. ZainTECH's approach is enabled by sustained investment in industry-specific talent acquisition, recently exemplified by the hire of domain specialists in BFSI and telecommunications to enhance consultative depth. Service delivery is supported by an expanding COE, which acts as a hub for consolidating technical assets and frameworks, fostering the delivery of advanced offerings such as GenAI solutions, agentic workflows, and predictive analytics.

Within major transformation programs, ZainTECH conducts large-scale digital transformation engagements and point solutions. Recent initiatives span fraud detection and compliance in BFSI, telecom customer value management, insurance claims automation, and drone-enabled inspections in oil and gas. Solution enablement is anchored in a robust local presence, regulatory-aware delivery

models (frequently 100% onshore for sensitive industries), and a curated ecosystem of hyperscaler and specialized technology partners. The firm's consultative discovery process uses structured workshops to help clients prioritize AI initiatives and accelerate POC cycles.

ZainTECH is developing proprietary assets like Ijaba.AI, a GenAI chatbot that enables users to interact with documents, URLs, and databases to extract insights and automate labor-intensive business tasks. ZainTECH is actively working toward accelerating AI adoption, alongside frameworks for AI readiness, responsible governance, and use case enablement. Ongoing internal transformation and the integration of recent acquisitions remain priorities to achieve greater operational cohesion and drive scalable innovation across the GCC.

Strengths

ZainTECH demonstrates strong vertical expertise in the BFSI and telecom sectors, investing in industry talent and COEs to drive consultative, value-led AI engagement. The company is proficient at integrating customized AI solutions, leveraging both proprietary tools and technology partnerships, and it offers an adaptive service portfolio that addresses data, compliance, and automation requirements across target industries.

Challenges

ZainTECH is still maturing its end-to-end frameworks and use case libraries, with several solutions and domain capabilities under development. Building operational integration across acquisitions and ensuring rapid scaling in industries beyond BFSI and telecommunications are ongoing organizational priorities. Adoption of certain in-house platforms remains limited to early stages.

Consider ZainTECH When

IT buyers should consider partnering with ZainTech for industry-specific solutions that accelerate digital transformation based on an integrated expertise in digital, AI, and cloud to drive a measurable impact. Organizations in regulated, data-sensitive sectors should also consider ZainTech for its consultative approach, onshore delivery, and ability to co-develop frameworks for responsible AI, governance, and transformation at scale.

VENDORS TO WATCH

The GCC AI professional services market landscape is expanding and includes many more companies than could reasonably be evaluated in a single study. Below you can find some other important players that are not featured in this study for various reasons, but need to be briefly mentioned.

- Artefact is a global data and AI consulting firm with a strong presence in the GCC region, focusing on delivering end-to-end AI-driven solutions to enterprise clients across sectors such as retail, financial services, and government. Leveraging proprietary frameworks and in-house-developed AI models, Artefact helps organizations accelerate digital transformation, optimize operations, and enhance customer experiences. The firm's expertise covers advanced analytics, data engineering, and machine learning, supported by a collaborative approach that integrates strategy, implementation, and change management. Artefact's go-to-market strategy is shaped by tailored partnerships with technology vendors and industry specialists, enabling contextualized solutions for local market needs. The company emphasizes measurable impact, ethical AI practices, and capability transfer to empower client teams on their digital journeys.
- KoçDigital is a Türkiye-based technology firm focusing on digital transformation through AI, IoT, and data-centric professional services, with growing operations in the GCC. The company's offerings center around Industry 4.0 and supply chain modernization, as well as enterprise-scale AI solutions, leveraging in-house platforms such as Platform 360 (IoT-driven manufacturing), Supply Dynamics (AI-infused supply chain management), and Gentio (GenAI for enterprise automation). KoçDigital's GCC approach features dedicated local and nearshore sales teams, collaboration with systems integrators and hyperscaler partners, and ongoing investment in local capabilities. A dedicated data and AI team, strong data governance practice, and the ability to provide both cloud and on-premises solutions underpin its delivery. The provider is expanding its reach in the manufacturing, government, oil and gas, finance, and retail verticals, aligning with regional digital agendas.
- Moro Hub, established in 2018 and a subsidiary of Digital DEWA in Dubai, is a UAE-based digital transformation and AI services provider focused on secure, enterprise-grade cloud infrastructure and sovereign solutions for public and private sector clients. Moro Hub operates a sizable solar-powered "Future Fit" datacenter and delivers a wide spectrum of AI-driven offerings across the GCC market. The company combines cutting-edge infrastructure with a broad portfolio of services spanning GPU as a service, LLM hosting, edge AI, data management, and AI platform solutions. Its sovereign AI infrastructure is utilized by government, semi-government, and regulated industries to run confidential and critical AI workloads.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis (or strategies axis) indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capabilities.

Market Definition

IDC defines artificial intelligence as systems that learn, reason, and self correct. These systems hypothesize and formulate possible answers based on available evidence, can be trained through the ingestion of vast amounts of content, and automatically adapt and learn from their mistakes and failures. AI systems use a variety of technology components across hardware (e.g., AI servers, AI storage, AI infrastructure as a service, AI network, and AI devices) and software (e.g., AI platforms, AI-enabled applications, and AI system infrastructure software). IDC's definition of AI includes three broad categories of capabilities (generative, predictive, and interpretive).

AI services providers engage with clients to help deploy and use AI systems through business services and IT services. This study only covers IT services including IT consulting and advisory, custom application development, technology customization, deployment, integration, training, and day 2 support services. IT outsourcing services are excluded from this study.

Strategies and Capabilities Criteria

Tables 1 and 2 include market-specific definitions and weights specifically tailored for AI professional services providers. These were used to assess each vendor's performance and determine their specific place on the IDC MarketScape chart. Table 1 shows the definitions and weighting criteria used to evaluate providers' strategies. Table 2 shows the definitions and weighting criteria used to evaluate providers' capabilities

TABLE 1

Key Strategy Measures for Success, Gulf Countries AI Professional Services

Strategies Criteria	Definition	Weight (%)
Functionality or offering strategy	- Excellence is marked by offerings that enable clients to create and execute an AI technology operating model. - Excellence is marked by offerings that enable clients to create and execute an AI-fueled business operating plan.	12
Delivery model strategy	- Excellence is marked by plans to deliver AI services at scale, utilizing more advanced and efficient tools and methodologies. - Excellence is marked by a cohesive strategy for the platform-based delivery of AI services.	6
Client adoption strategy	- Excellence is marked by methodologies and tools to help clients select appropriate use cases and justify expenditures for AI initiatives. - Excellence is marked by activities to engage and align stakeholders to drive AI solution adoption across the organization. - Excellence is marked by activities to enable clients' internal AI programs and centers of excellence.	14
Portfolio strategy	- Excellence is marked by a portfolio spanning the entire life cycle of AI services (project-based, managed, support, and training). - Excellence is marked by activities to incorporate AI agents and agentic workflows into the vendor's portfolio of AI services.	6
Sales/distribution strategy	- Excellence is marked by plans to improve direct sales efforts for AI services. - Excellence is marked by plans to cater to customer needs at different levels of AI maturity and preferences for different contracting models.	7
Marketing strategy	- Excellence is marked by a well-articulated plan to market AI services capabilities to key stakeholders. - Excellence is marked by the depth and breadth of marketing messages addressing key AI issues.	12

TABLE 1**Key Strategy Measures for Success, Gulf Countries AI Professional Services**

Strategies Criteria	Definition	Weight (%)
Other go-to-market strategy	- Excellence is marked by plans to improve sales channels using the technology partner ecosystem. - Excellence is marked by plans to improve the depth of relationships within the partner ecosystem.	6
Growth strategy	- Excellence is marked by strategic plans for both organic and inorganic growth and ones that align well with AI trends in the next one to three years. - Excellence is marked by superior planning for developing and monetizing proprietary AI tools, platforms, and products.	9
Innovation/R&D strategy	- Excellence is marked by plans for attaining or retaining functional superiority over competitors by improving innovation in AI services delivery methodologies and tools. - Excellence is marked by plans for innovation and R&D around responsible, ethical, and sustainable AI services delivery methodologies and tools.	12
Employee strategy	- Excellence is marked by the breadth of technology skills the vendor has in its AI services practice. - Excellence is marked by the breadth of business skills the vendor has in its AI services practice. - Excellence is marked by solid plans for hiring and retaining top-performing employees.	16
Total		100

Source: IDC 2025

TABLE 2**Key Capability Measures for Success, Gulf Countries AI Professional Services**

Capabilities Criteria	Definition	Weight (%)
Functionality/Offering delivered	- Excellence is measured based on analyst evaluation of the vendor's level of IP-based delivery. - Excellence is measured based on analyst evaluation of the vendor's level of AI-enabled delivery automation. - Excellence is measured based on customer reference perception of delivery methodologies, tools, and teams.	11

TABLE 2**Key Capability Measures for Success, Gulf Countries AI Professional Services**

Capabilities Criteria	Definition	Weight (%)
Delivery model appropriateness and execution	▪ Excellence is measured based on analyst evaluation of the vendor's level of IP-based delivery. ▪ Excellence is measured based on analyst evaluation of the vendor's level of AI-enabled delivery automation. ▪ Excellence is measured based on customer reference perception of delivery methodologies, tools, and teams.	8
Cost competitiveness	▪ Excellence is measured based on analyst evaluation of the vendor's ability to achieve measurable business outcomes for clients with AI services. ▪ Excellence is measured based on customer reference perception of ability to deliver an appropriate and sustainable business outcome for the client. ▪ Excellence is measured based on customer reference perception of ability to enable clients' internal AI programs.	18
Portfolio benefits delivered	▪ Excellence is measured based on analyst evaluation of the vendor's ability to enable clients to move AI pilots into production. ▪ Excellence is measured based on customer reference perception of vendor's ability to deliver across the AI services life cycle. ▪ Excellence is measured based on customer reference perception of vendor's ability to enable clients to move AI pilots into production.	5
Pricing model options and alignment	▪ Excellence is measured based on analyst evaluation of the types of pricing models offered to clients. ▪ Excellence is measured based on perception of capabilities to offer flexible pricing models and optimize the ratio of onshore and offshore delivery.	6
Sales/distribution structure and capabilities	▪ Excellence is measured based on analyst evaluation of the size of the vendor's team of sales professionals dedicated to selling AI services. ▪ Excellence is measured based on analyst evaluation of the experience level of the vendor's team of sales professionals dedicated to selling AI services. ▪ Excellence is measured based on perception of capabilities to craft solutions and work with partners during the sales process.	4
Marketing capabilities	▪ Excellence is measured based on analyst evaluation of the various marketing channels used relating to AI services. ▪ Excellence is measured based on perception of capabilities to communicate the value of services, solutions, delivery methodologies, and tools for AI.	10

TABLE 2

Key Capability Measures for Success, Gulf Countries AI Professional Services

Capabilities Criteria	Definition	Weight (%)
Customer service delivery	▪ Excellence is measured based on analyst evaluation of the vendor's ability to retain customers for additional AI projects. ▪ Excellence is measured based on analyst evaluation of the vendor's ability to retain customers for additional AI life-cycle services. ▪ Excellence is measured based on perception of capabilities to deploy local resources where appropriate to resolve problems and issues.	8
Growth strategy execution	▪ Excellence is measured based on analyst evaluation of revenue growth rates for AI services. ▪ Excellence is measured based on the vendor's ability to maintain a strong reference pool of satisfied clients.	9
Innovation/R&D pace and productivity	▪ Excellence is measured based on analyst evaluation of the breadth, depth, and impact of AI services innovation activity in the last two years. ▪ Excellence is measured based on perception of capabilities to transfer innovation to clients via innovative service delivery, thought leadership, and connection to third-party innovation resources.	12
Employee management	▪ Excellence is measured based on analyst evaluation of the size of the vendor's team of professionals dedicated to delivering AI services. ▪ Excellence is measured based on analyst evaluation of the certifications held by the vendor's team of professionals dedicated to delivering AI services. ▪ Excellence is measured based on perception of the quality of resources provided for AI projects.	9
Total		100

Source: IDC, 2025

LEARN MORE

Related Research

- *Saudi Arabia: From Vision to National Impact — Accelerating Vision 2030 Readiness Through Strategic Business Automation* (IDC #META53705225, August 2025)

- *IDC Market Glance: Generative AI Governance in META, 3Q25* (IDC #META53670025, August 2025)
- *To What Extent Are Tech Buyers in the Middle East, Türkiye, and Africa Adopting or Evaluating DeepSeek AI Models?* (IDC #META53512825, June 2025)
- *The Impact of AI Agents on Business Automation* (IDC #EUR153351725, May 2025)
- *Microsoft's \$1.5 Billion Investment in the UAE's G42: Delivering AI Value on a Global Scale* (IDC #META53292825, April 2025)

Synopsis

This IDC study provides a vendor assessment of the 2025 Gulf Cooperation Council (GCC) artificial intelligence professional services market using the IDC MarketScape model. This is the first time IDC has conducted a regional assessment of this market, and it comes as an extension of the global assessment completed in 2025. The regional assessment leverages a framework used in the global version. Unlike the global assessment, the regional analysis excludes business and managed services, focusing solely on IT project and support services while assessing the professional service capabilities of providers in the GCC.

"As GCC enterprises move AI from isolated experiments to the heart of their businesses, the real question is no longer if, but how fast and how well, they can scale, govern, and realize measurable impact. The race is on — not just for technology, but also for business transformation. Accordingly, customers' expectations of services partners are rising steadily, requiring them to develop relevant capabilities while pursuing a strategy that sustains their role as trusted advisors." — Melih Murat, associate research director, artificial intelligence, Middle East, Türkiye, and Africa, IDC

"Some organizations are pursuing an innovation-led MVP approach, building AI centers of excellence, investing in governance, and experimenting with solutions every six months. They typically prefer AI services providers with design thinking, a holistic business vision, and strong vendor partnerships. Others prioritize the implementation of proven use cases, engaging partners with large industry-specific libraries that meet their immediate needs while continuously expanding their offerings. Across both groups, there is growing interest in agentic AI, which is currently in exploration with a few initial deployments." — Eric Samuel, associate research director, IT services, Middle East, Türkiye, and Africa, IDC.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

IDC Middle East/Africa

Level 15, Thuraya Tower 1
Dubai Media City
P.O. Box 500615
Dubai, United Arab Emirates
+971.4.3912741
Twitter: @IDC
blogs.idc.com
www.idc.com

Copyright and Trademark Notice

This IDC research document was published as part of an IDC continuous intelligence service, providing written research, analyst interactions, and web conference and conference event proceedings. Visit www.idc.com to learn more about IDC subscription and consulting services. To view a list of IDC offices worldwide, visit www.idc.com/about/worldwideoffices. Please contact IDC at customerservice@idc.com for information on additional copies, web rights, or applying the price of this document toward the purchase of an IDC service.

Copyright 2025 IDC. Reproduction is forbidden unless authorized. All rights reserved.