

IDC MarketScape: Gulf Countries AI Professional Services 2025 Vendor Assessment

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IDC MARKETScape FIGURE

This Excerpt is for PWC

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.

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.

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.

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	<ul style="list-style-type: none">▪ 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

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

Strategies Criteria	Definition	Weight (%)
Delivery model strategy	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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
Other go-to-market strategy	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> Excellence is marked by plans for attaining or retaining functional superiority over competitors by improving innovation in AI services delivery methodologies and tools. 	12

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

Strategies Criteria	Definition	Weight (%)
	<ul style="list-style-type: none"> Excellence is marked by plans for innovation and R&D around responsible, ethical, and sustainable AI services delivery methodologies and tools. 	
Employee strategy	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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
Delivery model appropriateness and execution	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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. 	18

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

Capabilities Criteria	Definition	Weight (%)
	<ul style="list-style-type: none"> Excellence is measured based on customer reference perception of ability to enable clients' internal AI programs. 	
Portfolio benefits delivered	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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
Customer service delivery	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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

TABLE 2

Key Capability Measures for Success, Gulf Countries AI Professional Services

Capabilities Criteria	Definition	Weight (%)
Innovation/R&D pace and productivity	<ul style="list-style-type: none"> ▪ 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	<ul style="list-style-type: none"> ▪ 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.).

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