



Transforming our Region: Future Insights – Future of Hospitality, Megawatts to Ecosystems & the Middle East Cyber Landscape

October 21 at 4 PM GST



Welcome

Stephen Anderson

Chief Strategy & Technology Officer
PwC Middle East

Economic Updates

Jing Teow

Partner, Economics & Sustainability
PwC Middle East

Future of Hospitality

Marco Rentsch

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Megawatts to Ecosystems

Danny Touma

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Cybersecurity and Digital Trust

Samer Omar

Partner, Cybersecurity and Digital Trust Leader
PwC Middle East

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Trade developments

An unsettled trade landscape persists, with renewed frictions between the US and China adding to global uncertainty

US introduces new port fees on Chinese linked vessels

The US launched new port fees on Chinese-owned, operated, or built ships as part of efforts to curb China's control over global shipping routes and rebuild domestic maritime capacity



China introduces export controls on rare earths

China released new rules requiring government licences for exporting certain medium and heavy rare-earth elements, magnets, alloys, and technologies used for processing or recycling rare-earths



China responds by imposing mirror port charges

China retaliated by introducing equivalent "special port fees" on US-linked vessels, mirroring the US's tariff structure



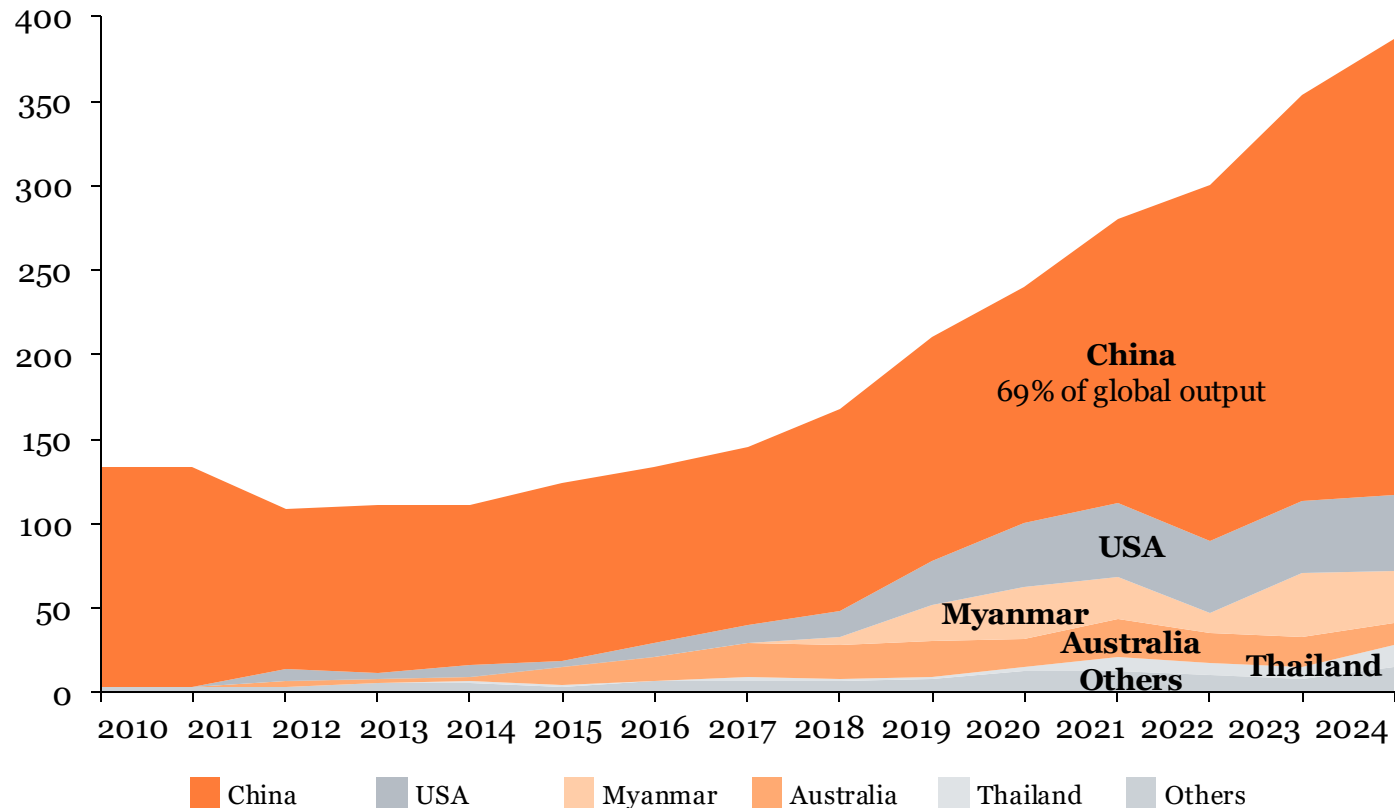
US threatens 100% tariffs

President Trump responded by threatening to impose 100% tariffs on all Chinese imports effective November 1, 2025, unless China reversed its export curbs

From trade wars to resource wars

Countries are asserting control over critical minerals to advance their own geopolitical and economic objectives

Real earth production ('000 metric tons)



With the October 2025 expansion of export controls on rare earths, China aims to strengthen its domestic industry and consolidate its influence over global clean-energy supply chains.



A widening wave of resource nationalism is fragmenting supply chains and prompting new alliances, stockpiles, and financing partnerships to secure long-term access to critical minerals.

Economic updates

The IMF upgraded GCC growth forecasts, driven by the faster reversal of oil production cuts, surging non-oil activity underpinned by fiscal momentum, and stronger-than-expected early-year performance



Slightly increase in global economic growth

0.2 pp

increase in global economic growth is expected in 2025

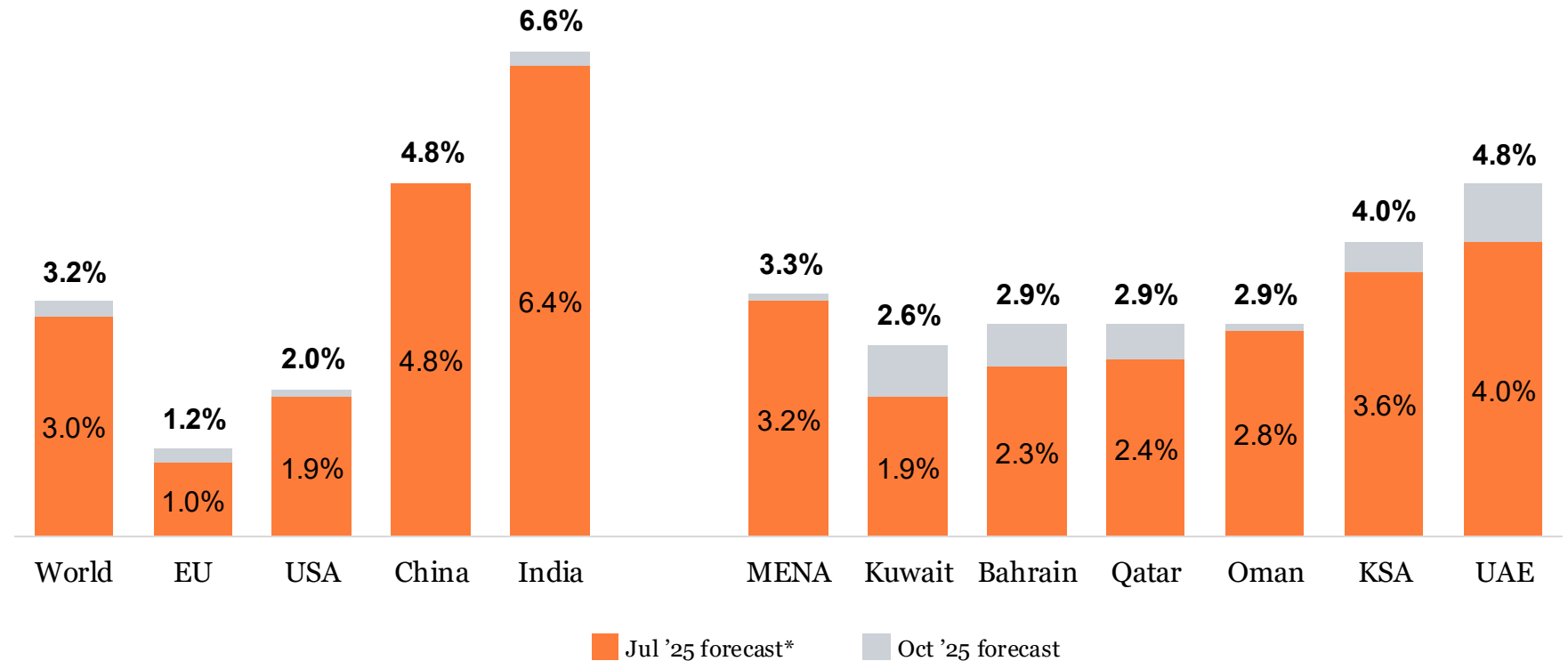


Slight upgrade in MENA regional growth

0.1 pp

increase in regional economic growth is expected in 2025

Real GDP growth forecast for 2025, Jul 2025 vs. Oct 2025%



Source: IMF World Economic Outlook report – Oct 2025

* Growth estimates from the IMF's April 2025 WEO report were used for all GCC countries except Saudi Arabia, as the July 2025 report only included forecasts for major economies



Future Hospitality Summit

27 – 29 October 2025 | Madinat Jumeirah, Dubai

Knowledge Partner

Game on for the GCC: Turning sporting ambition into lasting tourism impact

The GCC is redefining sports tourism –

moving from hosting events to building connected, experience-led destinations that attract visitors all year.



Economic Catalyst

- Sports tourism accounts for **10% of global** tourism spend, worth USD 700 billion in 2023 and expected to exceed **USD 2 trillion by 2030**.
- The GCC is investing strategically to make sport a key driver of tourism and non-oil GDP.



Regional Momentum

- Qatar, Saudi Arabia and the UAE have proven their ability to deliver transformative mega-events, from the FIFA World Cup to the Esports World Cup.
- These events strengthen global visibility, youth engagement and infrastructure investment.



Year-round opportunity

- The next phase for the GCC is to move beyond event hosting to building holistic, lifestyle-driven sports destinations.
- Integrating sport with leisure, wellness, esports, and women's sports can sustain visitor activity across all seasons.

Regional Achievements

- **Qatar:** 5 million visitors in 2024, USD 2.3–4.1 billion in revenue
- **Saudi Arabia:** Sports market expected to triple from US\$8 billion to US\$22.4 billion by 2030
- **UAE:** Leading events in F1, Golf and Tennis, and 2.2m Fitness Challenge participants, strong multi-sport calendar

Regional Impact

- GCC sports economy worth USD 600 billion, growing 8.7% annually
- Women's sports revenue growth projected at double digits
- Esports and national leagues are driving year-round tourism

Turn Vision into Tourism impact

1. Design experience-led sports destinations, not just events
2. Deepen immersive fan experience to attract and retain visitors
3. Build a connected, region-wide sports tourism ecosystems



Scan to read the report

Adoption and impact of AI in Hospitality and Tourism

A PwC-led survey on how AI is transforming how destinations compete, operate and grow by redefining efficiency, sustainability and guest experience.

Demographics

35

Respondents
(senior industry leaders
in the GCC)

51%

Of respondents represent
hotel groups

45%

Of respondents manage
30+ properties

Areas of transformation

- **Guest Experience:** Predictive hyper-personalisation and seamless augmented service.
- **Human Resources:** Smart training, predictive scheduling, and workforce analytics.
- **Operations and Infrastructure:** Data-driven decisions, connected systems, real-time optimisation, supply chain efficiencies
- **Channel Management:** Dynamic pricing, sentiment monitoring and AI-driven visibility.

91%

of surveyed tourism and
hospitality leaders are already
piloting or using AI.

85%

report measurable cost
savings and efficiency gains.

3%

Yet only 3% have achieved
full-scale implementation,
highlighting strong potential
for growth.

94%

confident in AI's business
impact.

Future Hospitality Summit - Our participation



Scan
for the full
agenda



01

Content

Three co-branded reports:

- Sports tourism
- AI in hospitality
- FHS event highlights

02

Panels

Our presence includes six panels:

- Growth frontiers
- Converging travel segments
- Next-Gen hospitality
- Education and upskilling
- Sports and Entertainment
- AI In Hospitality

03

Workshop

A hands-on workshop demonstrating how AI is reshaping hospitality through smarter, more personalised solutions

04

Interactive booth

The booth brings innovation to life – with the EmTech team showcasing proprietary tech solutions such as AI- powered digital humans and mixed reality landmark experiences.

Leadership on ground



Nicolas Mayer
Partner, Global Tourism Leader



Roland Hancock
Partner, Education and Skills Leader



Marco S Rentsch
Partner, Hospitality Leader



Philippe Najjar
Partner, Experience Leader



Moussa Beidas
Partner, Ideation Leader



Jesko von den Steinen
Director of Experience Consulting



Mushtaq Al Waeli
Senior Executive Advisor - Sport



Peter Daire
Senior Executive Advisor - Sport

Megawatts to Ecosystems

Danny Touma

Partner, Energy Transition
PwC Middle East



Out now: From Megawatts to Ecosystems

Our latest paper on delivering resilient power value chains in the Middle East

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Global themes

01 Increasing power demand from new industries



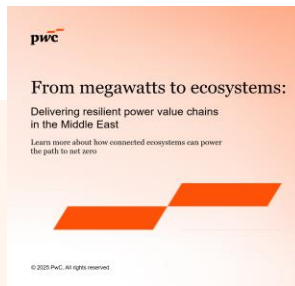
02 A shortage of electrical equipment



03 A recognition that the 'traditional models' won't serve us in the future



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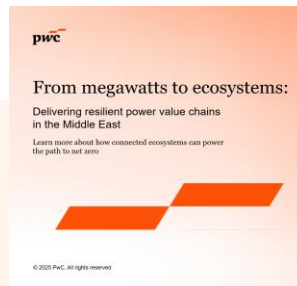


We surveyed energy leaders across the region on market and energy trends



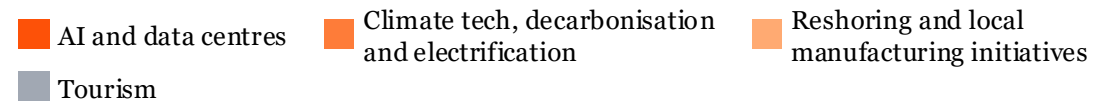
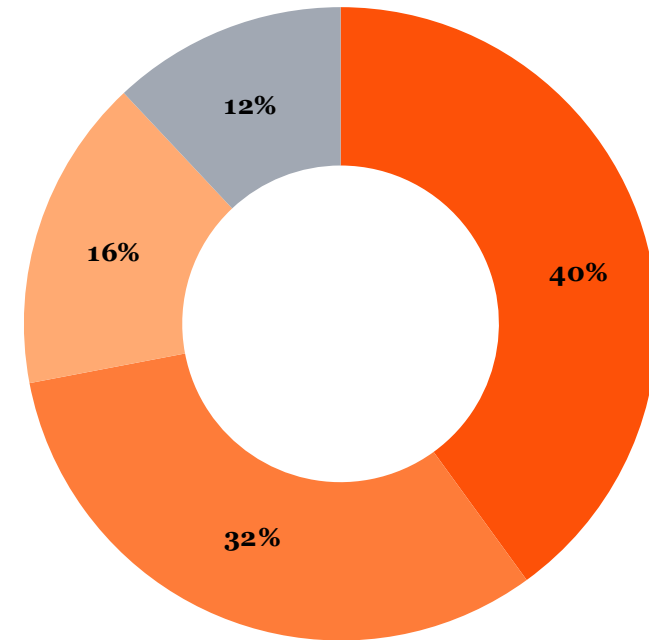
AI, climate tech, decarbonisation and electrification are the leading investment thematics.

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Question:

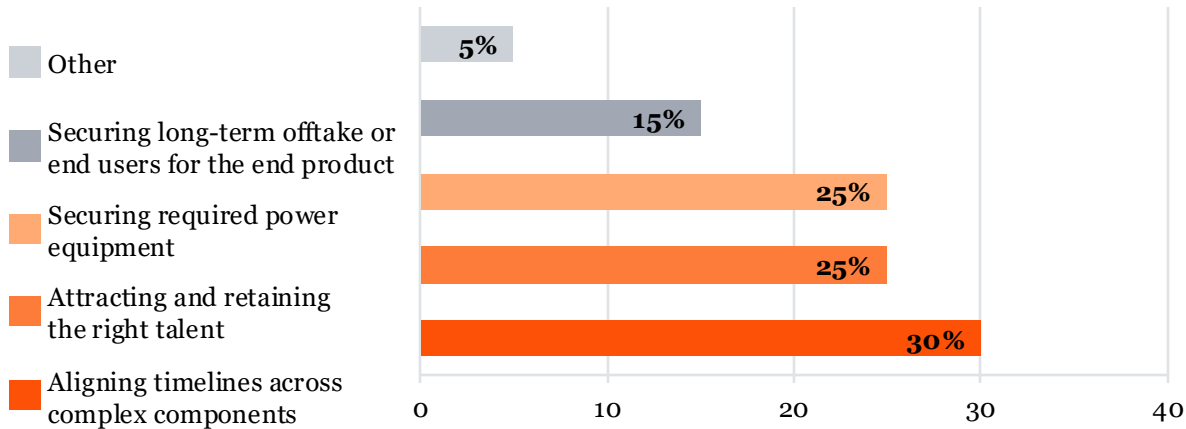
What do you see as the biggest opportunities to drive regional growth?



Energy executives across the region highlighted the biggest challenges to delivery

Question:

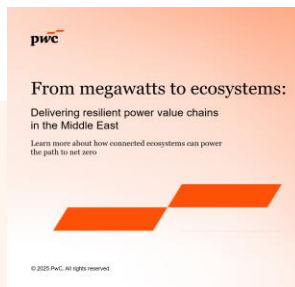
What do you see as the biggest roadblock to delivering the next wave of energy infrastructure to enable new industry in the region?



Executives are least worried about securing long term offtake or end users to enable new industry.

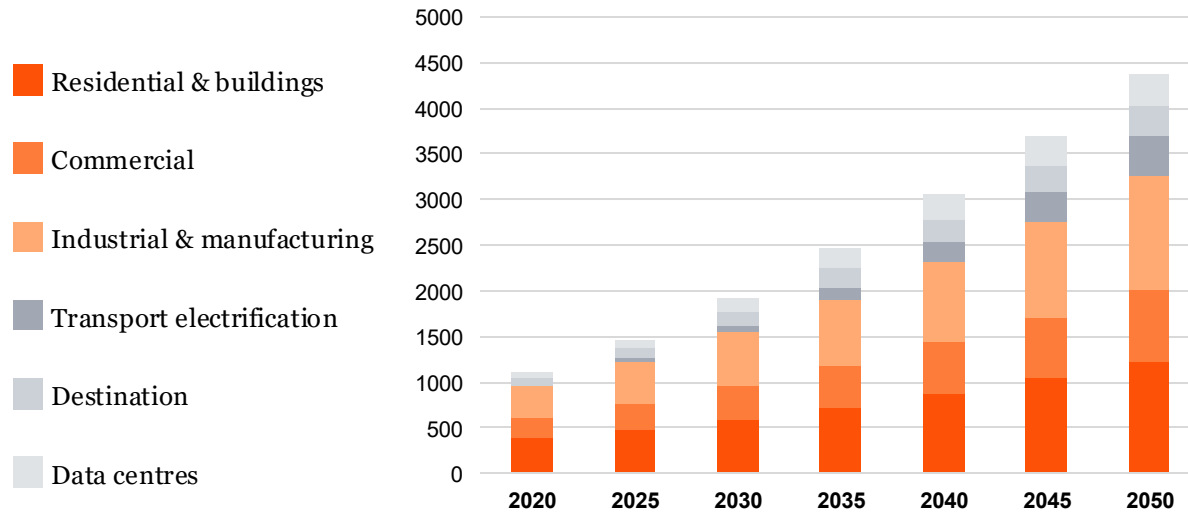


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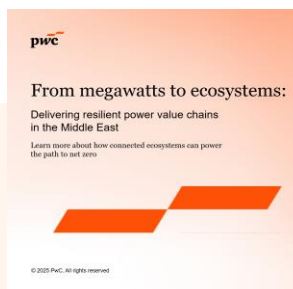


Increasing energy demand in the Middle East

Middle East electricity demand evolution



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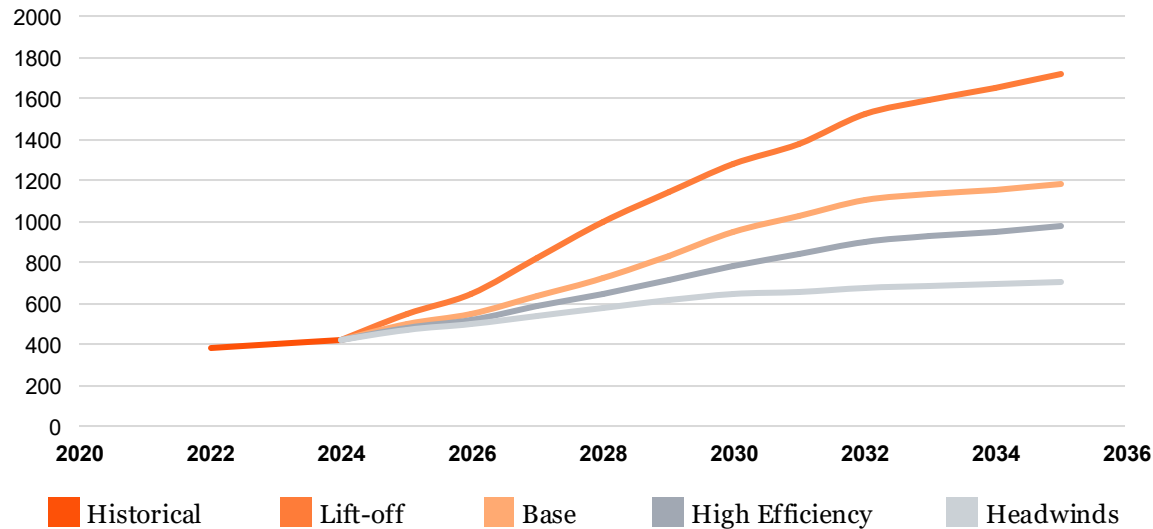
With hyperscale data centres, AI hubs and industrial clusters driving demand, the region now faces growing pressure for uninterrupted, high-capacity power.

By 2030, data centre capacity is expected to triple, further straining grids and shifting the challenge from seasonal peaks to year-round supply stability.



Rising electricity demand from global data centres

Global data centres electricity demand



Data centres are reshaping global electricity demand, and while the full impact is still unknown, the trajectory is only upward.

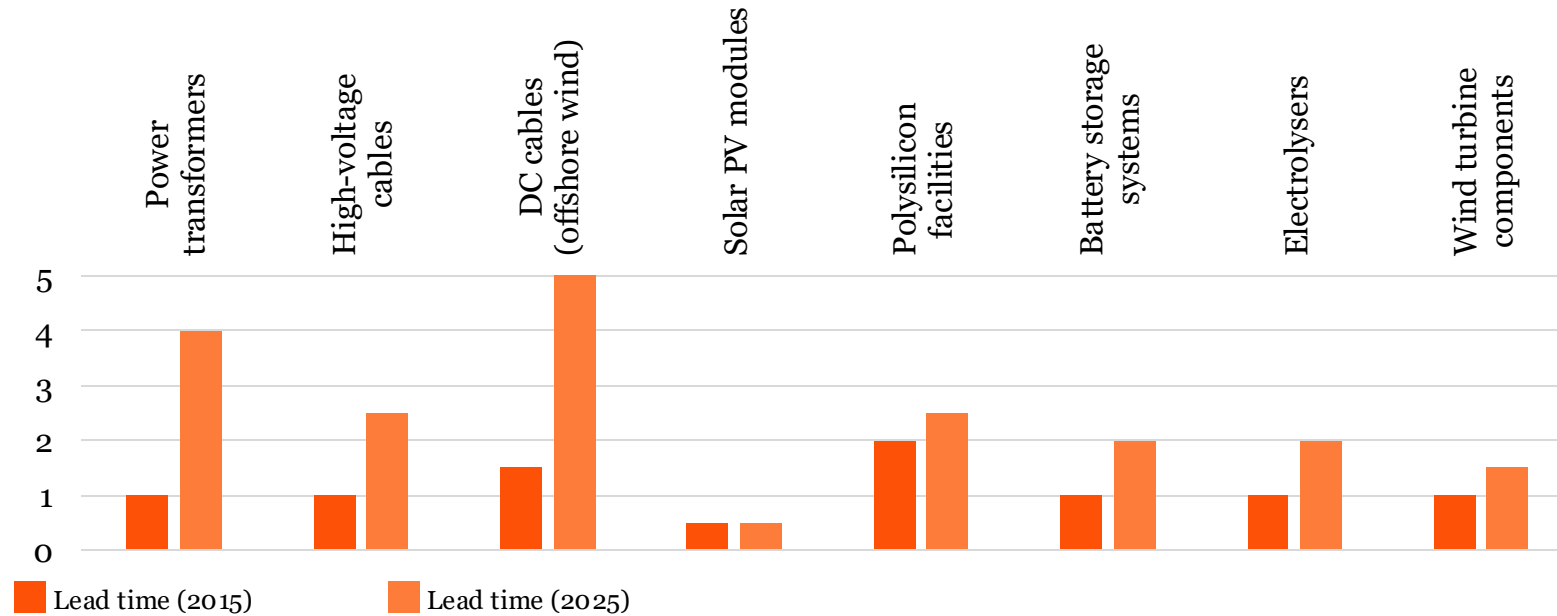


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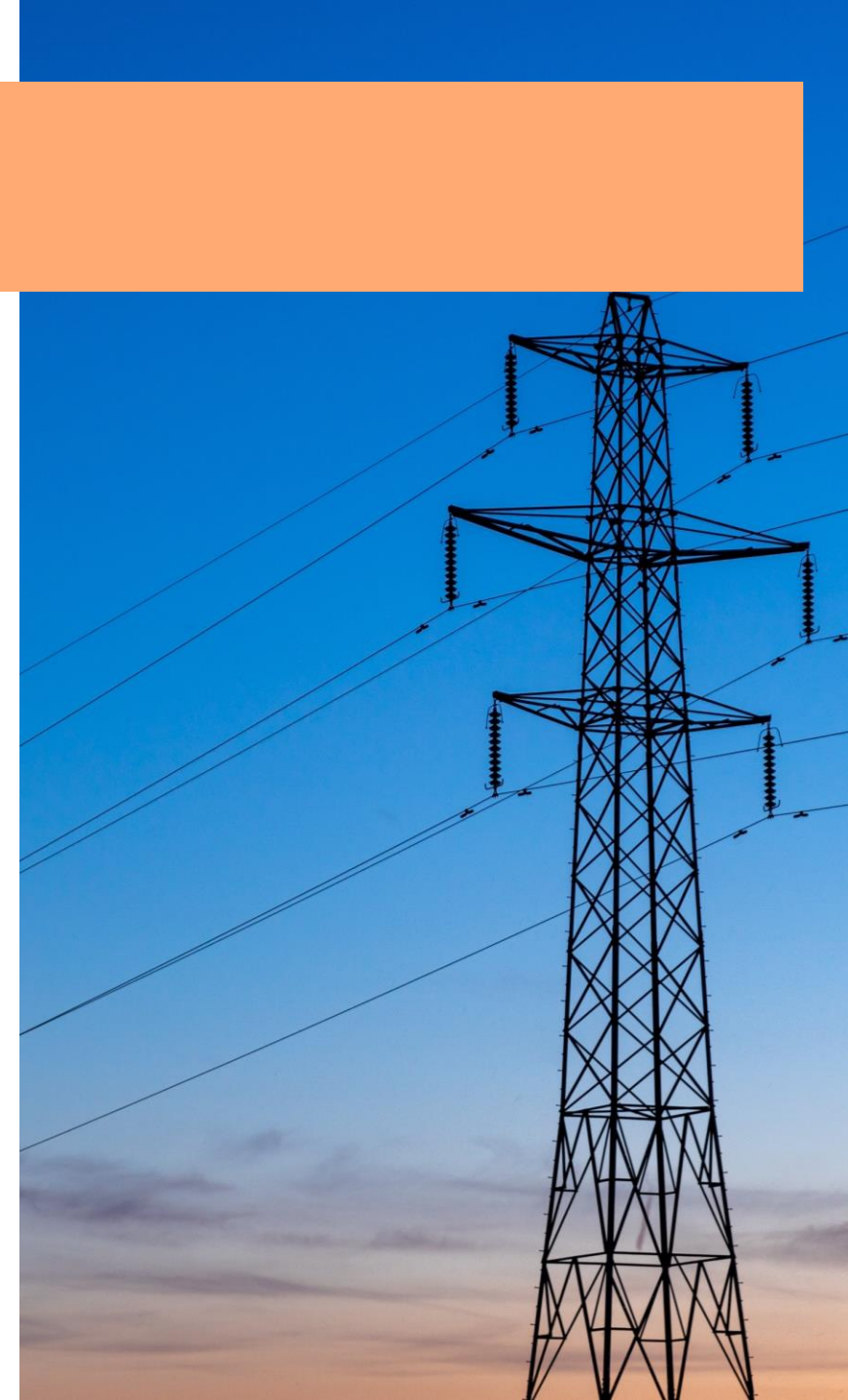


Supply chain squeeze

Lead time evolution for key components



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Strategic enablers - capturing the opportunity in the Middle East

01

Sovereign wealth funds as system integrators



02

Export Credit Agency and supplier diplomacy

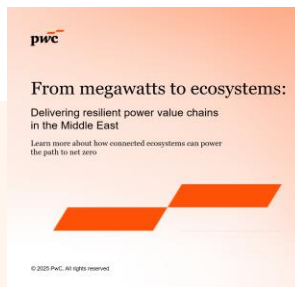


03

Cluster planning and proactive transmission development



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Cybersecurity and Digital Trust

4

Samer Omar

Cybersecurity and Digital Trust Leader
PwC Middle East

New world, new rules: Cybersecurity in an era of uncertainty

| 2026 Global Digital Trust Insights survey

Our 28th year

publishing the findings of our global cybersecurity survey, the **longest-running and largest of its kind**

3,887

business and tech executives surveyed, including **CISO, CIO/CTO, CDO, CEO and CFO**

72 territories

participating, from W. Europe (32%), N. America (27%), Asia Pacific (18%), Latin America (11%), E. Europe (6%), Africa (4%), Mid-East (3%)

57%

of participating companies have **\$1 billion+** of revenue, with representation across all industries and sub-industries

Access the full 2026 report and C-suite playbook at www.pwc.com/us/dti

Key themes for 2026

01

Risk and threat landscape
Geopolitics are reshaping cyber exposure

02

Cyber strategy and operations
Where investment meets impact

03

AI in cybersecurity
From promise to priority

04

Quantum computing readiness
Preparing for next-level threats

05

Cyber talent and skills
Managed services move to the front line

06

C-suite playbook: What leaders can do now
Align cyber with business strategy

Risk and threat landscape: Geopolitics are reshaping cyber vulnerabilities

60%

are increasing cyber risk investment in response to geopolitical volatility

6%

are 'very capable' of withstanding cyber attacks across all vulnerabilities surveyed given the geopolitical landscape

Top 2

cyber threats organisations are least prepared to address: Cloud and connected products



Cyber strategy and operations: Where investment meets impact

Only **24%**

are spending significantly more on proactive vs reactive cybersecurity measures

78%

expect their cyber budget to increase over the coming year

Only **16%**

are measuring the financial impact of cyber risks to a significant extent



AI in cybersecurity: From promise to priority

No. 1

cyber investment priority for security leaders is AI

No. 1

AI security capability prioritised by security leaders is AI threat hunting

No. 1

areas of priority for agentic AI are cloud security, data protection and cyber defense



Quantum computing readiness: Preparing for next-level threats

49%

of organisations haven't considered or started implementing any quantum-resistant security measures

Top 4

threats organisations are least prepared to address now includes quantum computing

Only 8%

of security leaders include quantum readiness in their top three budget priorities



Cyber talent and skills: Managed services moved to the front line

Top 2

challenges to implementing AI for cyber defense are knowledge and skills gaps

53%

rank AI and machine learning tools in their top three priorities to address cyber talent gaps over the next 12 months

48%

of organizations that have experienced a major attack are prioritizing managed services to address cyber talent gaps



From uncertainty to action: What leaders can do now

CISO

Translating cyber risks into business terms and promoting shared accountability is key to securing executive buy-in. This alignment enables stronger governance, resilience, and compliance.

CTO/CIO

Focus on securing tech adoption and closing talent gaps is key to strengthening cyber posture. Continue partnering with security leaders to embed risk and governance across transformation.

CRO

Your focus on enterprise and emerging risks — and their cybersecurity interdependencies — is vital to safeguarding the organisation. Continue refining controls and validating frameworks as threats evolve.

CFO

Your role in ensuring proactive cyber investments are built into strategic and tech initiatives is key to resilience. Continue aligning budgets to high-impact areas and addressing inefficiencies.

CEO

Your commitment to elevating cybersecurity as a business priority is critical. Keep aligning cyber risk with strategic initiatives and fostering C-suite collaboration

The C-suite playbook



Upcoming - Global Digital Trust Insights Middle East findings



Anchor programmes driving impact

CISO500 Programme

- PwC's flagship initiative in collaboration with sirar by stc aimed at advancing cybersecurity maturity and resilience across the region.
- 5-year programme that kicked off in May 2025 that will train 500 cybersecurity professionals by 2030.

[Learn more about the CISO500 programme](#)



Global Cybersecurity Summit

Theme

New world, new threats, new leadership: Are you cyber-ready?

Dates

October 28 – 29 (Tuesday – Wednesday); starting at 10 am UK time

Cyber leadership



Cyber strategy and operations



Emerging tech and innovation



Risks and threats



Register for the event:
pwc.com/gcs

Q&A

Thank you