

GCC Region Digital Services 2022-2023 RadarView

Creating a sustainable, technology-
enabled economy

February 2023

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About the report

1

To realize its vision of a sustainable economy and strengthen its contribution to the global economy, the Gulf Cooperation Council (GCC) governments' digital push is driven by a three-fold strategy: economic diversification, citizen services, and innovative projects.

2

Service providers are changing their approach to adapt to local policies and government directions by enhancing their regional leadership, developing their talent pool, focusing on gender diversity, and collaborating with universities and startups to establish a regional partner ecosystem.

3

The *GCC Region Digital Services 2022-2023 RadarView* provides enterprises with a comprehensive view of leading digital transformation services providers in the GCC countries, namely Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, and the United Arab Emirates (UAE).

4

Avasant evaluated 37 digital services providers with a presence in the region using a rigorous methodology across three key dimensions: practice maturity, investments and innovation, and ecosystem development. Of the 37 evaluated, we recognized 20 providers for bringing the most value in the region over the past 12 months.

5

The report also highlights key regional trends and offers Avasant's viewpoint on the road ahead for GCC companies over the next 12 to 18 months.

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Executive summary

Key trends shaping the GCC region

Greater cooperation amongst GCC nations, mainly to drive tech adoption and trade

- Governments, private enterprises, and universities have undertaken several multicountry initiatives to drive technology research, grow the region's tech talent pool, and identify joint tech enablement opportunities.
- National governments have invested in tech-enabled systems, such as ID verification and digital integration, to ease cross-border trade within the GCC region. This is augmented through policy changes to simplify trade processes and practices.

Policy amendments to boost FDI in non-oil sectors have started paying dividends

- All major GCC countries have implemented reforms in commercial laws, pegged their currencies to the US dollar, eased investment processes, allowed 100% foreign ownership, developed free zones, and signed trade deals with strategic countries. They have also amended immigration laws to access foreign talent.
- As a result, banking, financial services, insurance, and real estate sectors now receive higher FDI than the traditional oil and gas sector. Manufacturing, retail, and tourism have also seen FDI acceleration.

Sustained public tech spending underpins efforts to meet three-pronged agenda

- GCC governments have identified digital technologies as the key lever for meeting the trifecta of goals around economic diversification, improving citizen services, and driving innovation.
- This has led to heavy public and private spending on AI, blockchain, metaverse, and other digital technologies to upgrade payment systems, enhance healthcare, standardize land records, provide virtual experiences, and other use cases. This focus will likely continue and increase over the next decade.

Sustainability, smart city initiatives, and digital industry are key investment themes

- The GCC region plans to achieve net-zero carbon emissions by 2050/2060. For this, the region's countries are investing in initiatives around clean energy, clean tech-based food and agricultural products, and sustainable finance. Smart city projects are also focusing on efficient energy usage and waste reduction.
- The GCC countries aim to become financial services and retail hubs by investing in digital foundation blocks such as digital currencies, blockchain cross-border transactions, and metaverse virtual retail experience.

Recommendations for private enterprises and public agencies

Use government focus on digital services as an opportunity for digital transformation

- Policies such as Dubai's new digital mandate obligate government entities, judicial authorities, and private entities to offer digital services to customers. These policies offer an opportunity for enterprises and agencies to revisit their business models and improve digital capabilities.
- This involves designing a strategy for developing or acquiring the digital talent for executing such large transformational projects and scouting for the right technology partners.

Embrace sustainability as a fundamental way of doing business

- As GCC governments have committed to aggressive carbon neutrality goals, regional enterprises will need to follow their lead and ensure that sustainable practices become standard operating procedures.
- To help meet sustainability goals, organizations can leverage AI to detect and reduce carbon emissions, transition to electric vehicles, and use blockchain applications to track products, prevent inefficiency, and improve the supply chain processes.

Consider local presence and partnerships for provider selection

- Engaging with service providers having a local presence and a global network of delivery centers can ensure the availability of required technical support around the clock with an optimum level of personalization in the services.
- A delivery model combining on-shore and off-shore resources can also help minimize the cost of transformation while maintaining the required quality of services.

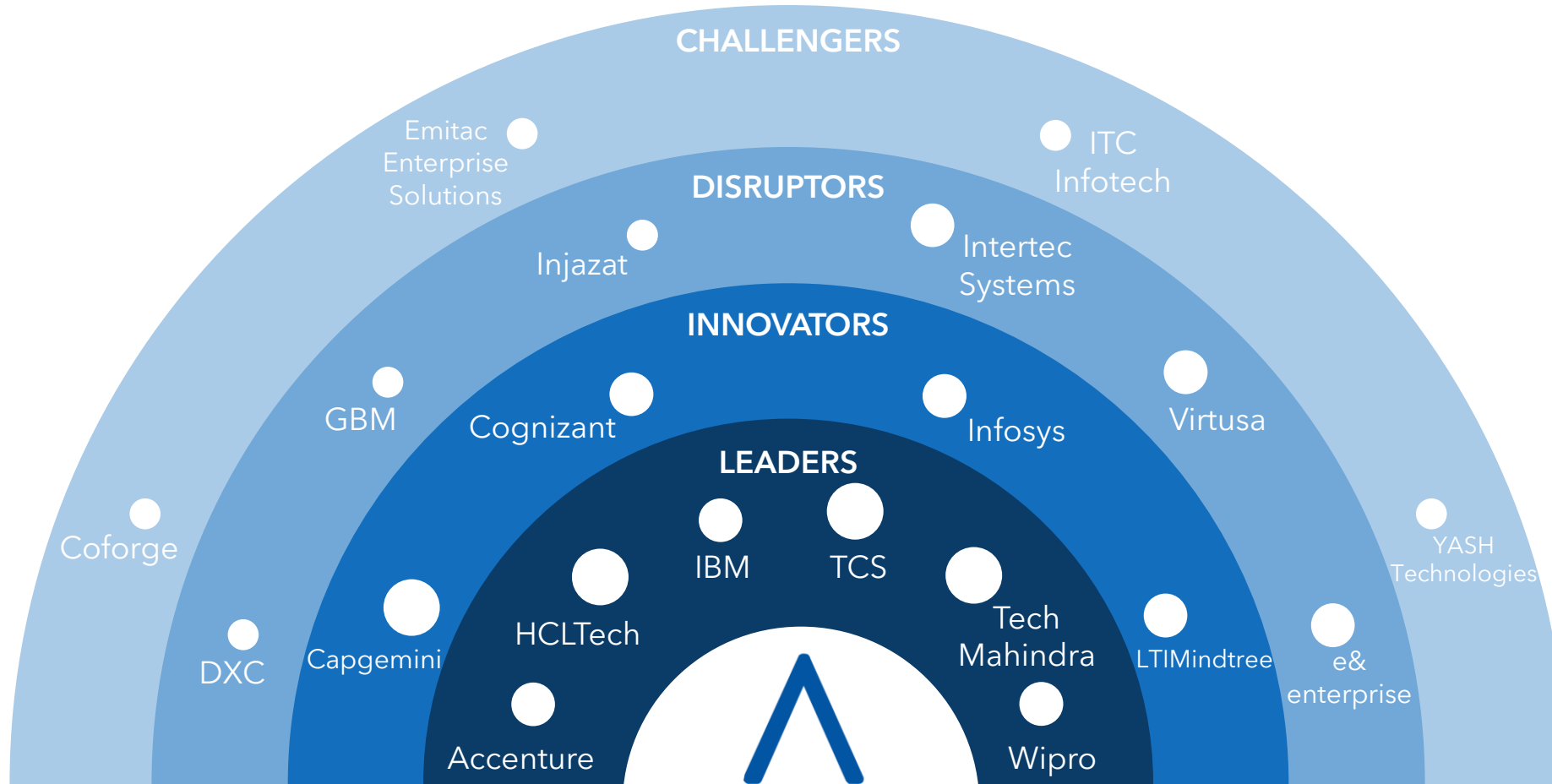
Design a strategy for developing digital talent

- Enterprises should induce skills/pyramid changes to counter the talent gap in the GCC region through periodic talent development initiatives.
- They must also refresh the talent pool at entry level based on skills to inject fresh ideas and capabilities into the organization. Lastly, they need to reduce over-reliance on particular personnel for providing digital services to customers by developing digital competencies of a large talent pool.

Avasant recognizes 20 top-tier service providers supporting the GCC region in digital transformation

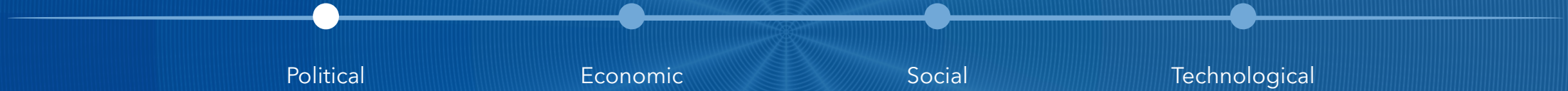


Practice maturity ○ ○ ○







State of the market



Increased cooperation between GCC countries for trade facilitation and technology adoption (1/2)

Several joint initiatives between GCC countries have been running successfully over the last few years.

| Area of cooperation | Joint initiative | GCC countries involved |
|---------------------|---|---|
| Trade facilitation | <ul style="list-style-type: none"> In October 2022, the Chambers of Commerce and Industry of Bahrain and Oman signed an agreement to expand trade and maximize investments. It provides investors with a foundation to develop partnerships and conduct business with private sector organizations. |  |
| | <ul style="list-style-type: none"> In March 2022, the UAE and Kuwait signed a deal for policies and systems integrations to set up a virtual trade corridor to promote cross-border trade. The deal will enable customs authorities of both countries to access pre-arrival information, resulting in faster cross-validation and clearance for traded goods. |  |
| | <ul style="list-style-type: none"> A pilot initiative using smart technology helped trucks cross the King Fahd Causeway between Bahrain and Saudi Arabia 12 times faster, reducing wait time from four hours to 20 minutes. Plans to add another bridge are in motion, providing cargo trucks with more capacity and improving export activity and customs processes. |  |

Increased cooperation between GCC countries for trade facilitation and technology adoption (2/2)

Several joint initiatives between GCC countries have been running successfully over the last few years.

| Area of cooperation | Joint initiative | GCC countries involved |
|---------------------|---|--|
| Technology adoption | <ul style="list-style-type: none"> In October 2022, Saudi Arabia and Oman signed private-sector agreements for strategic cooperation in select areas of technology. According to a memorandum of understanding signed between the governments of Oman and Saudi Arabia in November 2021, the countries will promote digital transformation projects and workforce training. |   |
| | <ul style="list-style-type: none"> Bahrain and Saudi Arabia are fast-tracking the integration of their identity verification systems through IT cooperation. This integrated system's perks include access to Saudi Arabia's Unified National Platform by applying local eKey credentials of Bahrain nationals and vice versa. |   |
| | <ul style="list-style-type: none"> The United Arab Emirates University is collaborating with Saudi universities and government research bodies to become a research-intensive university. This collaboration helps Saudi universities publish research papers on topics such as medicine, computer science, physics, chemistry, and astronomy. |   |

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State of the market

Political

Economic

Social

Technological

Measures taken by GCC countries include policy amendments to boost FDI in emerging industries



The policy reforms are across the board, from commercial laws to investment processes. This is coupled with setting up special economic and free zones to facilitate investments.

Increasing self-reliance with the push toward emerging growth sectors

- To realize the vision of becoming sustainable economies, the GCC countries are taking several steps to boost FDI in healthcare, tourism, education, manufacturing, agri-tech, and renewable energy.

Permitting 100% ownership for foreign investors

- GCC countries are becoming more investment friendly. Foreign investors no longer need to partner with a GCC citizen or agent to open an agricultural, manufacturing, or wholesale and retail trade company.

Pegging currency to the US dollar to ease FDI and support economic growth

- The GCC region has pegged its currency to the US dollar, which has supported economic growth, controlled inflation, and maintained financial stability through an influx of FDI.

Commercial law reforms

- The UAE has amended its existing commercial law to allow non-Emiratis of all nationalities to establish companies in any business sector, except critical ones such as oil and gas exploration.

Investment process improvements

- GCC governments are promoting investment agencies like SIPA (Kingdom of Saudi Arabia) and MOCIIP (Oman) to attract foreign investors. It helps maintain partnerships between local and foreign players.

Free zone developments





- In 2020, Oman formed a public authority to facilitate investment in OPAZ (special economic and free zones) areas with strategically located ports well-connected with modern infrastructure and facilities.

New trade deals

- The Gulf region is expanding its economic partnerships. The UAE has signed a comprehensive economic partnership with India, Israel, and Indonesia to promote, facilitate, and monitor mutual investment opportunities.

The GCC region is positioning itself as a financial services hub

GCC countries are utilizing digital technologies, such as blockchain, AI, and ML, to offer digital banking services, and plan to introduce their digital currencies soon. They are also incubating the fintech startup ecosystem through various accelerator programs and initiatives.

|  Digital banking |  Digital currency |  Blockchain adoption |  Fintech accelerator programs |
|---|---|---|---|
| <ul style="list-style-type: none"> GCC region banks are adopting digital services, ranging from 24/7 banking platforms to mobile banking. The UAE established 40 financial free zones to encourage innovation in digital banking. | <ul style="list-style-type: none"> All GCC countries* are planning to launch their digital currencies. The UAE will launch its first digital currency by 2026. An IMF study shows that 76% of Arab banks are interested in adopting digital currencies. | <ul style="list-style-type: none"> GCC region banks are leveraging blockchain platforms to transform government transactions, money transfers, and cross-border payments. The banks of Kuwait and Oman utilize RippleNet's blockchain technology for cross-border payments. | <ul style="list-style-type: none"> Across the GCC region, governments and central banks promote an open banking ecosystem with enhanced customer experience. Several fintech startup accelerator programs and government initiatives are gaining momentum in GCC. |



Note: *except Kuwait
Source: Avasant Research

State of the market

Political

Economic

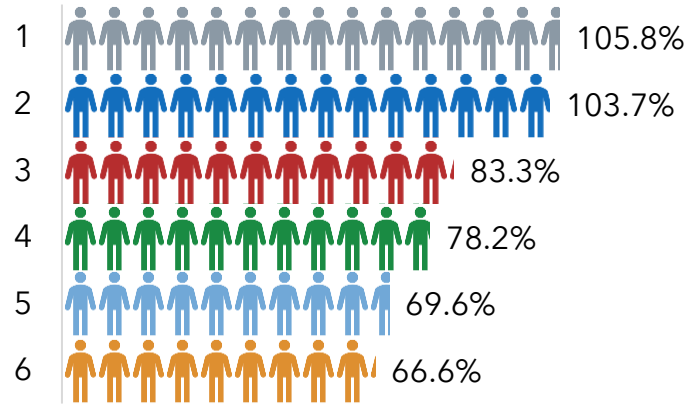
Social

Technological

The rollout of COVID-19 vaccination programs and the easing of pandemic restrictions have reopened the GCC countries





GCC governments effectively leveraged technologies, such as AI, drones, sensors, and mobile apps, to analyze COVID-19 spread and apply suitable control measures for the pandemic.

Share of the population vaccinated against the COVID-19 virus, October 2022



Note: The share of the vaccinated population may exceed 100% as it includes non-residents such as tourists and foreign workers.

Pandemic restrictions across GCC countries were removed between February and November 2022

| | | |
|---|---|---|
|  | Removal of travel restrictions | <ul style="list-style-type: none"> Proof of vaccination is no longer compulsory to enter any of the GCC countries. |
|  | Official COVID-19 apps are not required | <ul style="list-style-type: none"> Visitors do not require a green pass issued by official COVID-19 apps to enter public places. |
|  | Wearing masks is no longer mandatory | <ul style="list-style-type: none"> Across the GCC region, people are allowed to be mask free in both open and closed spaces. |
|  | Public gatherings are allowed | <ul style="list-style-type: none"> Governments have canceled the capacity limit for gatherings in open and closed areas. |

Technology interventions to manage the pandemic



Touchless keypads

The Abu Dhabi International Airport deployed touchless keypads with infrared sensors for elevators to detect motion.



AI to manage citizen movement

Dubai Police introduced Oyoon, which used AI to check whether citizens have valid permits.



Mobile app to streamline test applications

The Saudi Ministry of Health launched the central appointment system to streamline COVID-19 testing.



Drones to broadcast warnings

Dubai Police deployed drones equipped with cameras and loudspeakers to broadcast health and safety protocols

Changes to immigration legislation attract talent and promote an all-inclusive culture



GCC countries are taking steps to attract foreign talent and skilled individuals, moving toward social stability by implementing family and women safety laws.



Personal and family law reforms

- The UAE is introducing new laws that will allow non-Emiratis to address their personal affairs, such as divorce and inheritance, according to the law of their home country.



Unemployment insurance program

- To retain the best international talent, the UAE has developed an unemployment insurance scheme that will provide allowance to residents working in the public and private sectors if their employers terminate them.



Real-estate reforms

- In Bahrain, foreigners can renew their five-year, self-sponsored visa if they purchase a freehold property.
- Qatari ministry allowed residency on buying real estate worth at least \$1 million.



Long-term residency program

- UAE initiated a Golden Card visa program that gives 10-year residency to exceptional workers and foreign investors and introduced a green visa to promote entrepreneurial setups.



Reforms to empower women

- Gulf countries are increasing female participation by creating a safe working environment, led by the UAE, Saudi Arabia, Oman, and Kuwait.



Abolishment of the Kafala system

- Bahrain was the first country to abolish the Kafala system in the Gulf region.
- Currently, except for Kuwait, all GCC countries are free from the Kafala system.

State of the market

Political

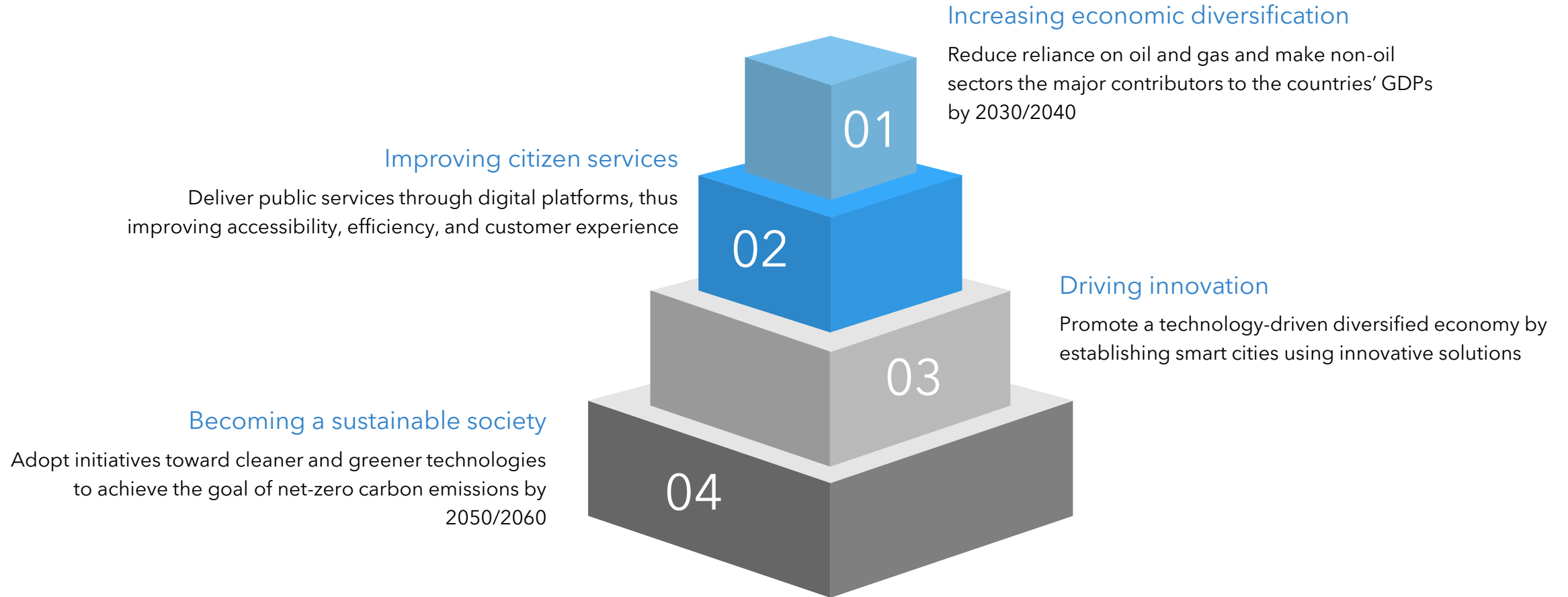
Economic

Social

Technological

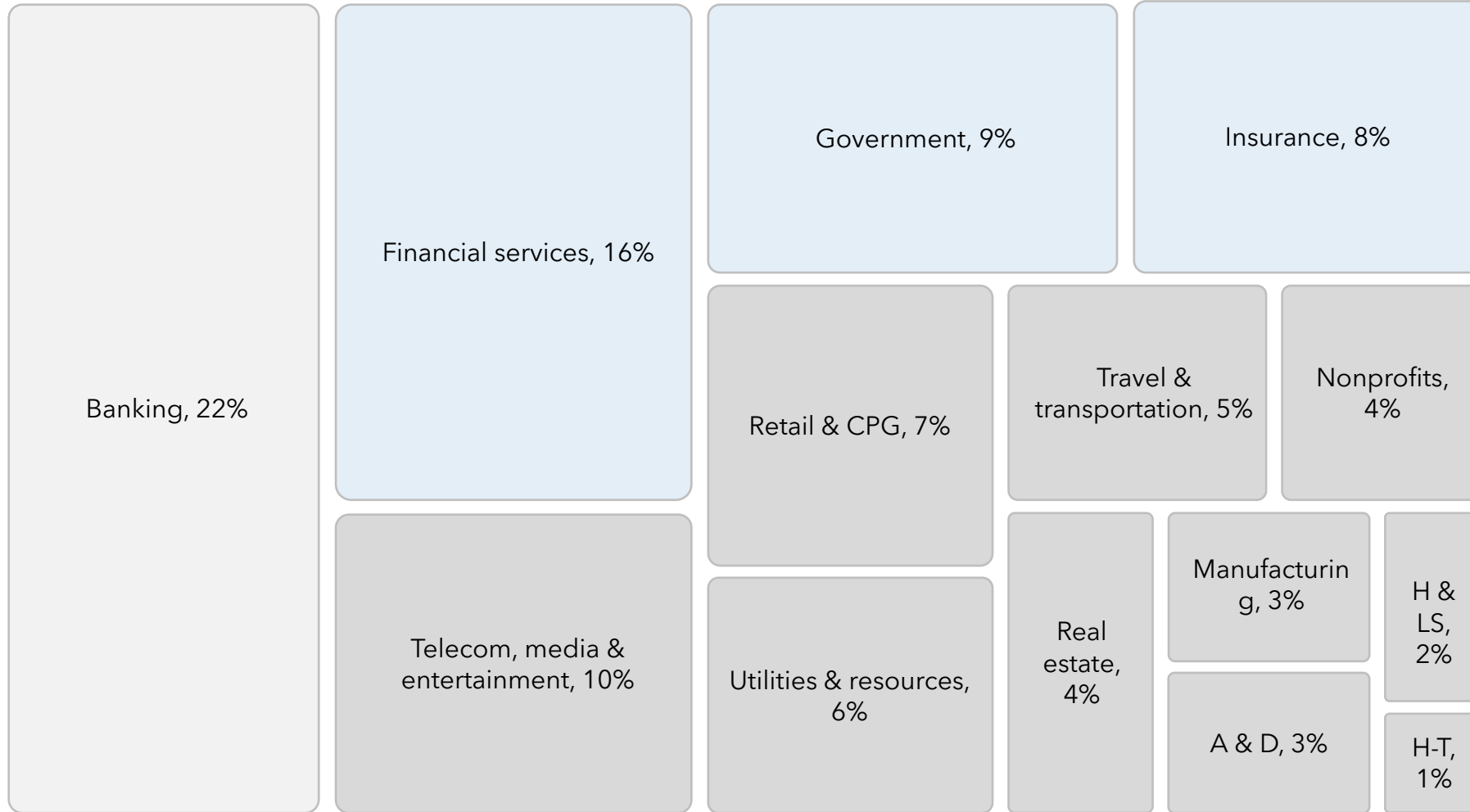
Economic diversification, enhanced citizen services, innovation, and sustainability is driving tech initiatives

Goals of GCC governments that are driving technological investments



Economic diversification efforts drive digital initiatives across banking, financial services, and telecom

Share of digital investments across different industries



Key initiatives to address emerging use cases within the GCC region



Payment platforms



Smart retail solutions



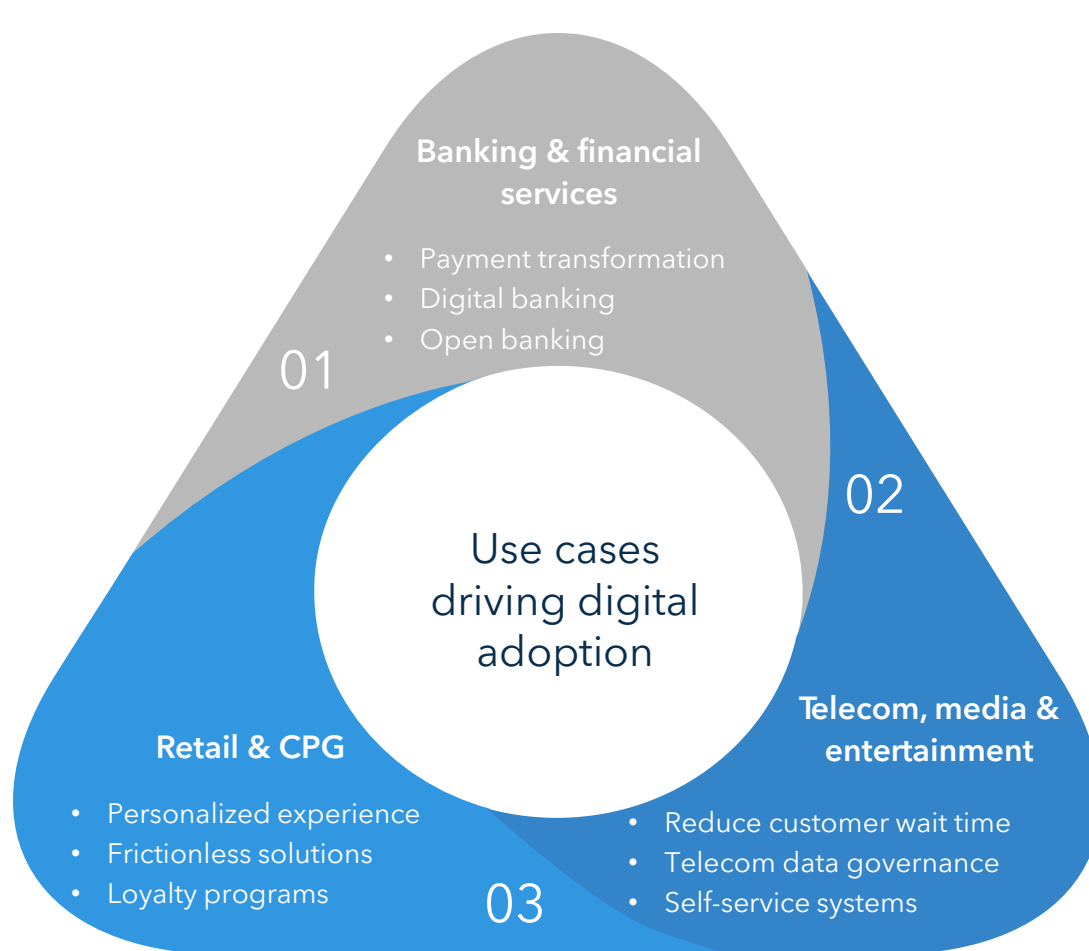
Self-service and field service solutions

Note: A & D refers to aerospace and defense, H & LS refers to healthcare & life sciences, H-T refers to high-tech

Source: Avasant GCC Region Digital Services RadarView Survey, July-August 2022

Significant traction is happening across industries to solve emerging use cases through digital technologies

Payments, telecom, and retail solution vendors are catering to the surge in demand by collaborating with service providers.



1



مصرف الإمارات العربية المتحدة المركزي
CENTRAL BANK OF THE U.A.E.

- The Central Bank of the UAE partnered with a consortium of Accenture, G42, and SIA to design an instant payments platform to improve the financial services ecosystem in the UAE.
- The platform will enable real-time fund transfers 24 hours a day.

2



- du Telecom collaborated with TCS to leverage its Field Service Automation solution to reduce customer waiting time.
- The solution helped the client's operations team to receive 98% positive customer feedback during field visits.

3

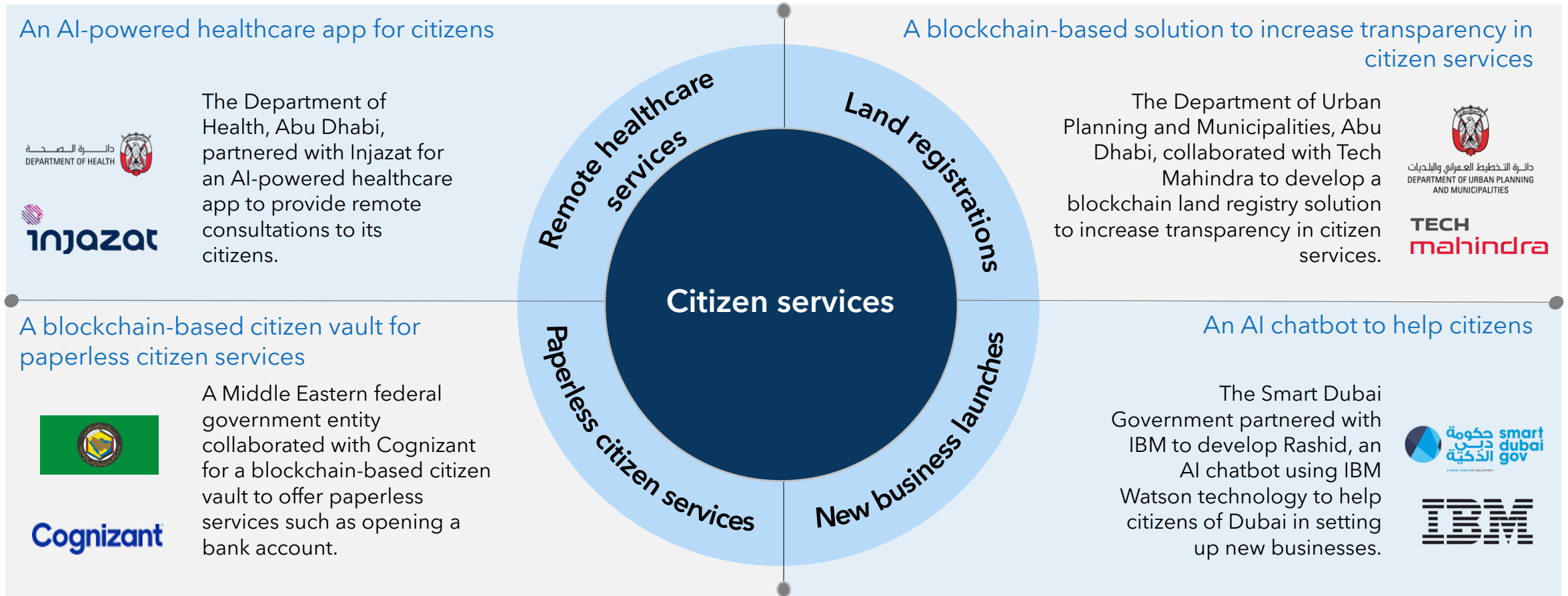


- The Dubai Municipality collaborated with e& enterprise to leverage frictionless retail solutions to optimize payment processes for purchasing gifts from the Dubai Frame shops.
- It improved visitor experience and reduced waiting times.

Note: Examples from select service providers

Source: Avasant Research

Citizen services are being modernized by government entities predominantly using AI and blockchain technologies



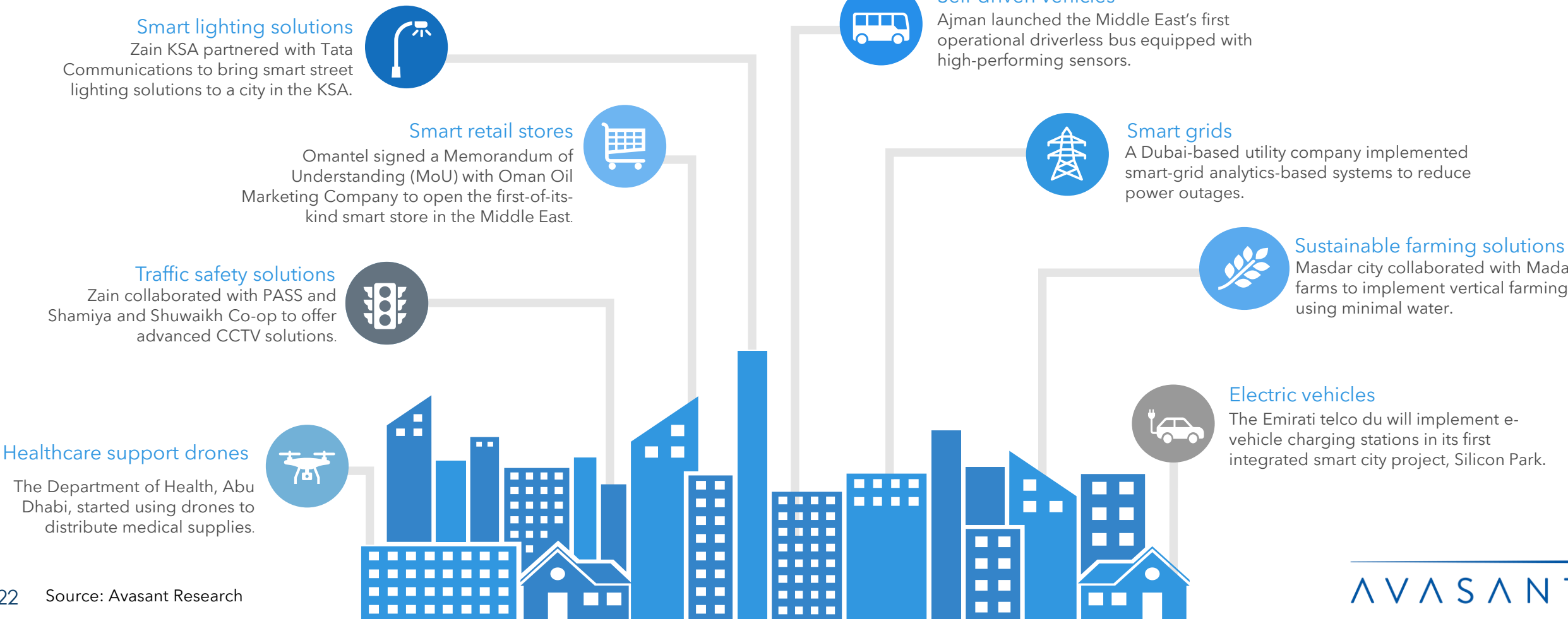
Note: Examples from select service providers

Source: Avasant Research

The innovation agenda is being driven primarily through smart city projects across the region

The GCC region's governments are creating new and modern cities using drones, driverless buses, smart lighting, electric vehicle charging stations, and vertical farming solutions.

Prominent smart city projects



The GCC region's enterprises have embraced the metaverse and initiated several projects focused on immersive experiences

 
 Qatar Airways partnered with Neutral Digital to provide its website users with a virtual tour of the airport's check-in area and the aircraft's interior.


Airline



  | 
 Etisalat by e& collaborated with Huawei to develop a virtual retail space providing a virtual shopping experience through a live 5G network.

Retail



 | 
 The UAE Health Ministry partnered with TMRW to launch the world's first metaverse service center to enable customer transactions in the virtual room.

Healthcare



Policing



The Ajman Police implemented a virtual reality platform where avatars of police officers help with general public inquiries.



Tourism



The Sharjah Commerce & Tourism Development Authority partnered with Multiverse Labs to build a public metaverse of Sharjah city to offer personalized simulated experiences and recreational services to visitors.

Entertainment



 | 
 e& aligned with SK Telecom to allow customers to visit virtual e& NFT exhibitions and enjoy virtual entertainment shows.














 Commercial Bank International launched its metaverse location, allowing customers to do financial transactions virtually.

Banking



The GCC region is adopting initiatives that promote cleaner and greener technologies

With the goal of achieving net-zero carbon emissions by 2050/2060, the entire GCC region is investing in several sustainable initiatives to preserve its economy and environment for future generations.

| | | | | |
|--|---|---|---|---|
|  <p>Investing in clean tech-based food and agricultural products</p> | <p>~90%</p> <p>Of the food across the GCC region was imported before the COVID-19 pandemic</p> |  <p>The UAE government supports the International Center for Biosaline Agriculture to research and develop agri-tech solutions for producing food locally and ensuring food security.</p> |  <p>Saudi Arabia has announced a joint venture between Tamimi Markets, Mitsui & Co., and Italian agri-tech provider Zero SRL to develop its first vertical farm project.</p> |  <p>Qatar achieved the first rank in the Arab world in the Global Food Security Index (2021) by adopting new technologies and sustainable farming practices.</p> |
|  <p>Promoting sustainable finance initiatives</p> | <p>\$230B</p> <p>The financing gap to achieve the SDGs* in Arab countries, according to the United Nations' 2021 report</p> |  <p>The Abu Dhabi Global Market is recognized as the world's first carbon-neutral international finance center for including ESG in its regulatory framework.</p> |  <p>Bank Muskat launched Oman's first environment-friendly finance product, Green Finance, to encourage the installation of residential solar panels.</p> |  <p>Qatar National Bank has launched a green energy-focused financial instrument with the London-based HSBC Bank to promote clean transportation.</p> |
|  <p>Advancing clean energy projects</p> | <p>60</p> <p>With this score, Qatar topped the World Bank's Energy Transition Index (2021) for the MENA region</p> |  <p>The UAE has unveiled the Middle East's first-of-its-kind garbage-to-electricity power plant in Sharjah to help achieve its UAE Net Zero 2050 carbon emissions reduction commitment.</p> |  <p>Oman aims to produce one million tonnes of green hydrogen annually by 2030 to meet its domestic demand and become a potential exporter.</p> |  <p>Kuwait has established the Shagaya Renewable Energy Park in its desert terrains to achieve its 15% renewable energy generation goal by 2030.</p> |

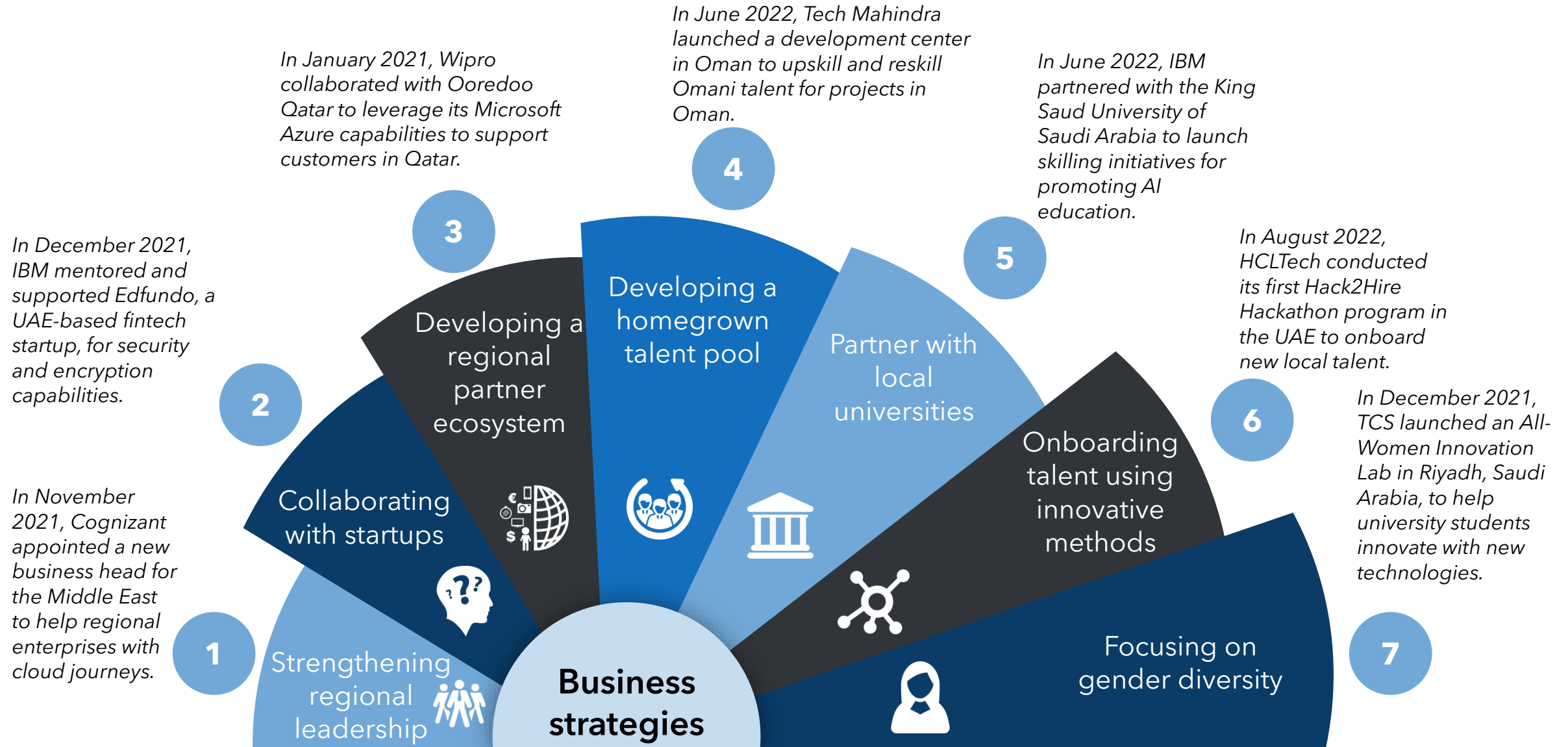
*SDGs refer to the United Nations' Sustainable Development Goals

Source: Avasant Research



Technology provider initiatives

Service providers are realigning their regional strategy










Note: Examples from select service providers

Source: Avasant Research

Service providers are pushing the sustainability agenda by collaborating with diverse regional players in the GCC

They focus on sustainability campaigns, carbon emissions reductions, green solutions, sustainable digital infrastructure, and gender equality initiatives.











| Initiative | Service provider | Partner | Rationale |
|---|---|---|---|
| Nationwide sustainability campaign |  |  | Injazat collaborated with the nonprofit EcoMatcher in the UAE to launch the One Billion Trees Initiative, a nationwide sustainability campaign to plant trees and track them through a blockchain-based application. |
| Carbon emissions reduction |  |  الهيئة السعودية للبيانات والذكاء الاصطناعي Saudi Data & AI Authority | IBM partnered with the Saudi Data and Artificial Intelligence Authority to leverage AI to detect and reduce carbon emissions in Saudi Arabia. |
| Green solutions |  |  | Tech Mahindra collaborated with Mahindra Racing, a motor racing team, to host Tech in Sustainability Ideathon Laps in Riyadh, KSA, for ideating green solutions around electric vehicles and sustainability. |
| Sustainable digital infrastructure |  |  | Wipro partnered with du, a telecom and information and communication technology services provider, to establish a cybersecurity center in the UAE to build sustainable digital infrastructure. |
| Gender equality |  |  PROMISE OF A GENERATION | Accenture aligned with Promise of a Generation, a community forum in the UAE, to launch the e7 Daughters of the Emirates initiative to ensure gender diversity and empower women for skill development in design thinking and AI. |

Note: Examples from select service providers

Source: Avasant Research

Service providers are either launching in-house programs or collaborating with regional players to develop talent

Talent development initiatives include organizing hackathons to onboard skilled developers, launching women's workshops to promote career growth, and introducing graduate programs to develop AI, ML, and cybersecurity skills.

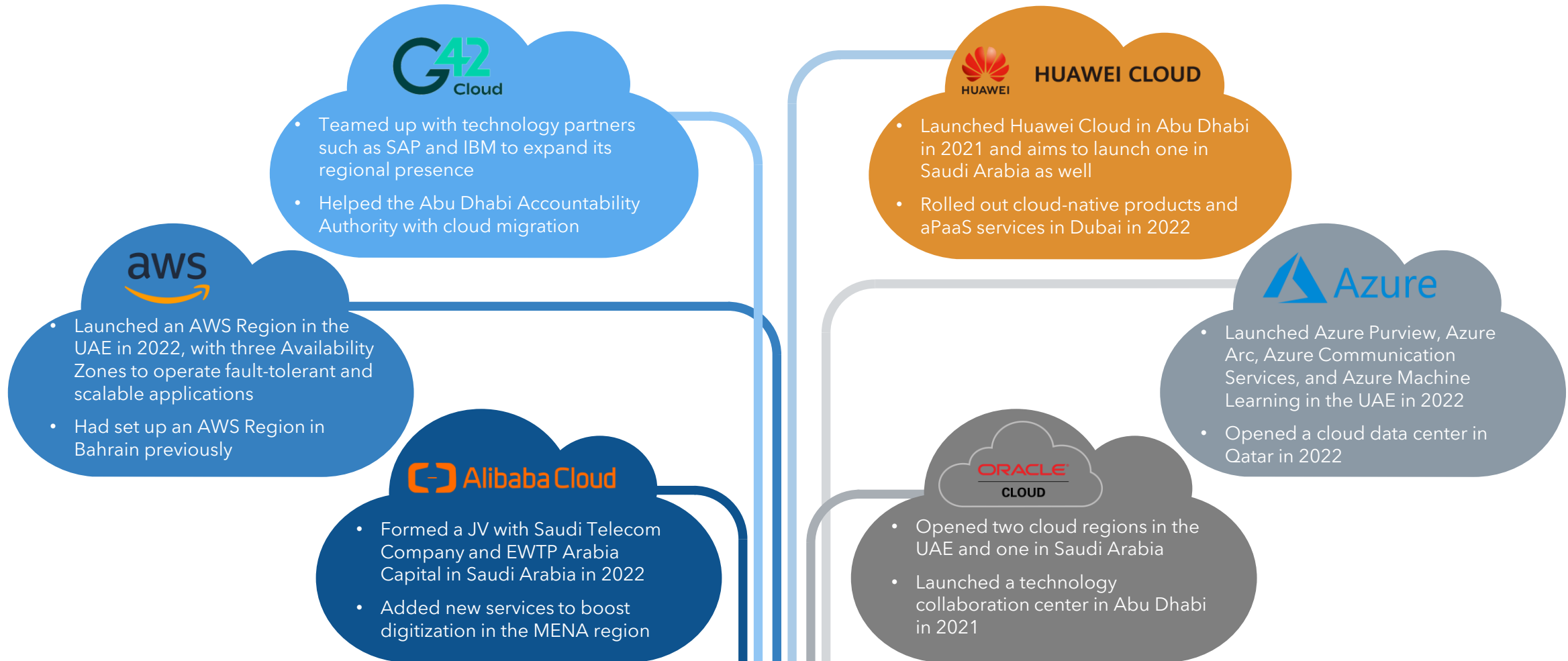
| Initiatives | Provider | Partner | Description |
|-------------------------------|---|---|---|
| Hackathons |  | - | HCLTech launched the Hack2Hire hackathon initiative to onboard skilled developers in the UAE. |
| Workshops |  |  | Wipro partnered with Salesforce to conduct workshops for women in Saudi Arabia to help them become certified professionals of Salesforce solutions. |
| Upskilling |  |  | IBM partnered with King Saud University, Saudi Arabia, to launch initiatives for promoting fundamental AI skills in students and advanced AI programs for the faculty. |
| Career readiness programs |  |  | TCS launched its goIT program in the UAE to inspire young students to pursue STEM careers. The first program under this initiative was held at JSS International School, Dubai. |
| Mentoring university students |  |  | Injazat collaborated with Zayed University, Dubai, to mentor students on EdTech projects and conduct research in AI. |
| Graduate programs |  | - | e& enterprise launched the Etisalat AI Graduate Programme to help Emirati graduates develop AI, ML, and cybersecurity skills. |

Note: Examples from select service providers

Source: Avasant Research

Cloud providers are expanding their influence in the region by extending their cloud capabilities

These capabilities include ML, AI, software development, data governance, and digital content production.



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RadarView overview

Avasant's GCC Region Digital Services 2022-2023 RadarView assesses service providers across three critical dimensions



Practice maturity

- This dimension includes measures around the type, regional acceptance, and quality of digital service offerings for the region. It also assesses the strength of the regional practice with respect to its size, certified employees, and embedded expertise in emerging technologies and industries.
- The width and depth of the client base, revenues coming from the region, usage of proprietary IPs and assets, and future strategy are important factors that contribute to this dimension.

Investments and innovation

- This dimension measures the strategic direction of investments and resultant innovations in the offerings and commercial model and how it aligns with the region's future direction.
- The overall strategic investments, both organic and inorganic, toward capability and offering growth, technology development, and human capital development, along with the innovations that the service provider develops with its partners in the region, are critical aspects of this dimension.

Ecosystem development

- This dimension typically assesses the nature of the partnerships and ecosystem engagement the provider has entered into for the region. It evaluates the objective of the partnership (for example, codevelopment or co-innovation), its engagement with technology solutions or product providers, and startup communities.
- It also focuses on the provider's initiatives toward digital ecosystem creation and development and knowledge development in the region.

Research methodology and coverage

Avasant based its analysis on several sources:

Public disclosures Publicly available information such as Securities and Exchange Commission (SEC) filings, annual reports, quarterly earnings calls, and executive interviews and statements

Market interactions Discussions with enterprise executives leading digital initiatives and influencing provider selection and engagement

Provider inputs Inputs collected through the service provider capability decks and structured briefings from July–August 2022

Of the 37 GCC region service providers assessed, the final 20 featured in RadarView for 2022–2023 are:



Note: Assessments for Coforge, DXC, e& enterprise, Emitac Enterprise Solutions, GBM, Injazat, Intertec Systems, and YASH Technologies were conducted based on public disclosures and market interactions only.



GCC Region Digital Services 2022-2023 RadarView

Reading the RadarView

Avasant has recognized GCC region providers in four classifications:



Leaders show consistent excellence across all key dimensions of the RadarView assessment (practice maturity, investments and innovation, and ecosystem development) and have had a superior impact on the region as a whole. These providers have shown creativity and innovation and have established trends and best practices for the region. They have proven their commitment to the region and are recognized as thought leaders, setting the standard for the rest of the region to follow. Leaders display a superior quality of execution and a reliable depth and breadth across verticals.



Innovators show a penchant for reinventing concepts and avenues, changing the very nature of how things are done from the ground up. Unlike leaders, innovators have chosen to dominate a few select areas or industries and distinguish themselves based on superior innovation. These radicals are always hungry to create pioneering advancements in the region and are actively sought-after as trailblazers, redefining the rules of the game.



Disruptors enjoy inverting established norms and developing novel approaches that invigorate the region. These providers choose to have a razor-sharp focus on a few specific areas and address those at a high level of granularity and commitment, which results in tectonic shifts. While disruptors might not have the consistent depth and breadth across many verticals like leaders or the innovation capabilities of innovators, they exhibit superior capabilities in their area of focus.

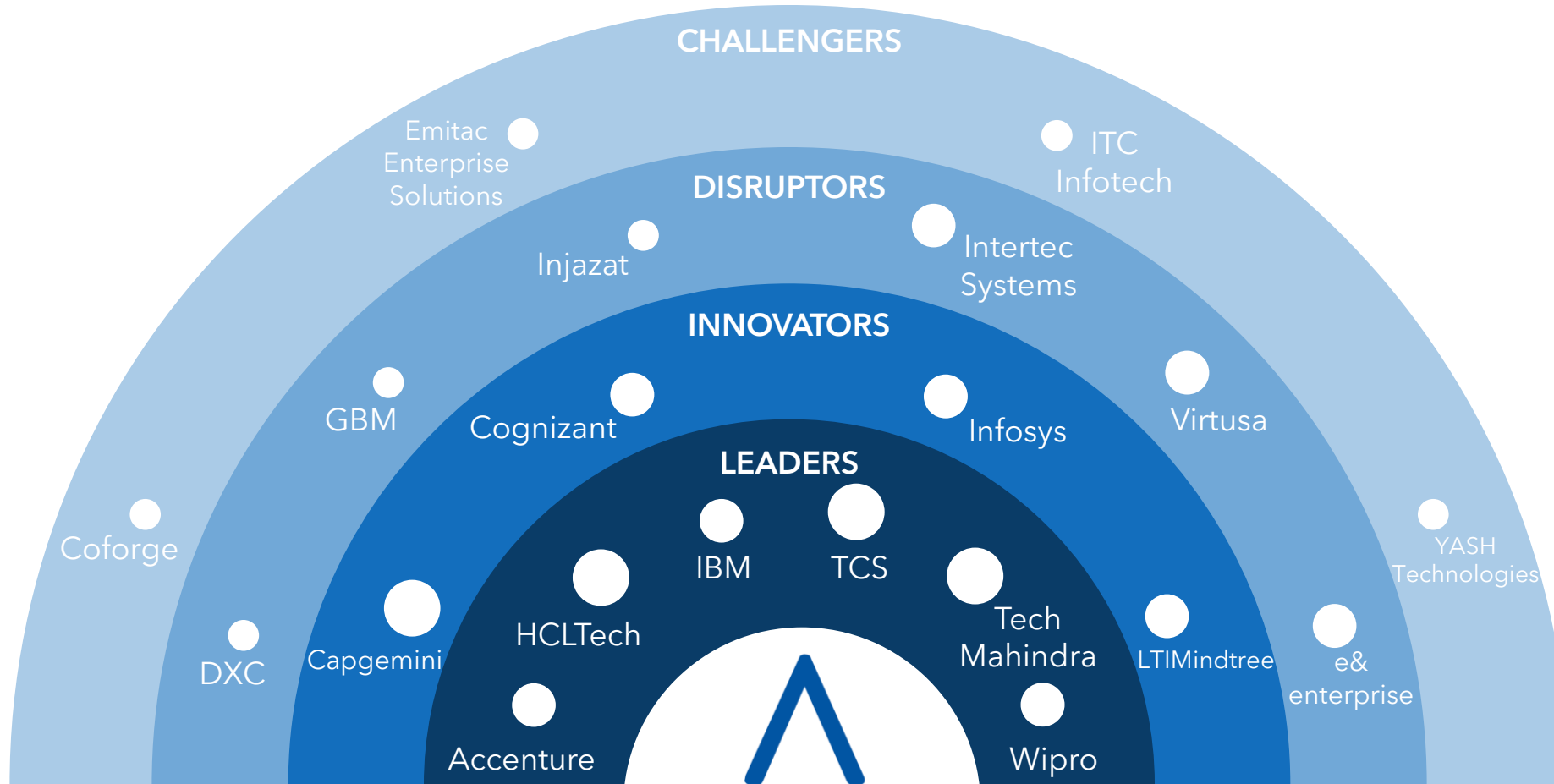


Challengers strive to break the mold and develop groundbreaking techniques, technologies, and methodologies on their way to establishing a unique position. While they may not have the scale of the providers in other categories, challengers are eager and nimble and use their high speed of execution to great effect as they scale heights in the region. Challengers have a track record of delivering quality projects. In select areas and industries, challengers might have capabilities that match or exceed those of providers in other categories.

GCC Region Digital Services 2022-2023 RadarView™



Practice maturity ○ ○ ○





Service provider profiles

Accenture: RadarView profile



Practice overview

- Practice size: 700+
- Active clients: 100+
- Delivery highlights: Delivering digital services in GCC for over 10 years

| | |
|--|---|
| ~\$12.2B Revenue from growth markets*, Mar 2022 | 20% Revenue share from growth markets*, Mar 2022 |
|--|---|

Key digital solutions

| | |
|--|--|
| Intelligent Public Safety Platform | A platform to detect and prevent crime while building public trust |
| Accenture Life Safety Solution | A wireless gas detection solution to protect workers in hazardous environment |
| Accenture Virtual Experience Solution (AVeueS) | An immersive learning solution to help human services workers improve their decision-making skills |
| Net New Revenue Platform (NNRP) | A blockchain platform to improve the revenue and customer experience for new marketplaces |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Develops proofs of concept using IoT, AI, and extended reality. Leverages managed security solutions to secure digital assets for airlines.

Sample clients

- Expo 2020 Dubai
- Etihad Airways
- L'Oréal Middle East
- Louvre Abu Dhabi
- Sadara Chemical Company
- Alawal Bank
- Saudi British Bank (SABB)
- Saudi Electricity Company
- Riyadh Airports Company
- INFINITI Middle East
- UAE Central Bank
- Etihad Etisalat (Mobily)

Partnerships/alliances

| | |
|--|--|
| | Leverages G42's cloud infrastructure to help GCC customers migrate to cloud |
| | Has collaborated with CBUAE to build a National Instant Payment Platform with Nexi Group and G42 |
| | Enhances the UAE's local talent base by developing the skills of Emiratis |
| | Partnered with FinTech Hive, DIFC for innovation in the financial services industry |

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |




Darker color indicates higher industry concentration: ●●●●●

*Note: Growth market implies the Asia Pacific, Latin America, Africa, and Middle East

Accenture: RadarView profile



Case studies

| Client | Capability | Summary | Business impact |
|---|--|---|---|
|  <p>LOUVRE ABU DHABI اللوفر أبوظبي</p> | <ul style="list-style-type: none"> Extended reality (XR) | <ul style="list-style-type: none"> Louvre Abu Dhabi wanted to improve the museum's digital ecosystem to enhance the visitor experience. Accenture improved the immersive experience of the Louvre Abu Dhabi museum by developing and implementing an XR strategy to engage visitors. | <ul style="list-style-type: none"> Improved visitor experience using XR |
| <p>EXPO 2020 Dubai</p> | <ul style="list-style-type: none"> Analytics | <ul style="list-style-type: none"> EXPO 2020 Dubai wanted to improve the visitor and participant experience and optimize the Expo's finance, procurement, and human resources (HR) processes using digital solutions. Accenture implemented an SAP S/4HANA platform with real-time analytics to transform visitor-facing and back-office operations. It also integrated internal processes, such as procurement, finance, and HR, into a unified platform to streamline the visitor experience. | <ul style="list-style-type: none"> Reduced turnaround time of internal processes Improved operational productivity of internal processes Optimized visitor and participant experience |
|  <p>SABB ساب</p> | <ul style="list-style-type: none"> Intelligent automation | <ul style="list-style-type: none"> Saudi British Bank (SABB), as part of its merger with Alawwal Bank, wanted to integrate the two banks' IT systems while maintaining regulatory compliance with minimal downtime. Accenture assessed the existing IT stack and proposed and executed a five-phase migration plan with regulatory governance and IT control processes. It also provided a defect management model to resolve the banking system problems faster. | <ul style="list-style-type: none"> Migrated over 90,000 Alawwal Invest customers to a unified IT system in one weekend Improved SABB's IT stack by integrating Alawwal's IT infrastructure capabilities |
|  <p>موبايلي mobily</p> | <ul style="list-style-type: none"> Analytics | <ul style="list-style-type: none"> Etihad Etisalat (Mobily) wanted to accelerate the delivery of its mobile services to improve customer experience. Accenture provided application development services to design and implement a solution for faster time-to-market and reduced costs. It also leveraged analytics to monitor and measure the target mobile subscribers' service requirements to improve their experience. | <ul style="list-style-type: none"> Reduced time-to-market of mobile services Enhanced customer experience by tracking subscriber data usage |

Analyst insights

Practice maturity



- Since starting its joint venture with the Al Faisaliah Group in 2011, Accenture has supported its GCC clients across the public, utilities and resources, financial services, travel, retail, and telecommunications sectors to create value. It offers them services such as advisory and consulting, testing, system integration, solution implementation, and application development and maintenance.
- It leverages emerging technologies, such as extended reality, intelligent automation, cybersecurity, AI and analytics, and cloud computing, to design innovative solutions. For instance, it leveraged a managed cybersecurity solution to secure the digital assets of Riyadh Airports Company.
- It solves business challenges, such as improving citizen services, operational efficiency, and customer experience, accelerating the time-to-market, and managing enterprise assets and marketing activities. For instance, it helped INFINITI Middle East streamline its digital marketing initiatives and customer experience using analytics. Similarly, it helped the Ministry of Transport and Communications, Qatar, develop an innovation management capability to improve citizen services using digital technologies.

Investments and innovation



- In November 2021, it acquired AppsPro, an Oracle Cloud implementation service provider in the Kingdom of Saudi Arabia (KSA), to augment its cloud capabilities and help GCC customers in their cloud journeys. In September 2021, the Microsoft and Accenture joint venture Avanade entered the UAE market to build new business models using the Microsoft platform for GCC clients.
- In February 2020, it launched the Dubai Tourism Innovation Hub, its first in the Middle East, to develop proofs of concept and innovative solutions using the IoT, AI, and extended reality. In 2016, it launched its Digital Acceleration Center for digital and smart innovation to support the UAE vision. In 2015, it launched the resources manufacturing center of excellence in the KSA to provide services to oil and gas companies.

Ecosystem development



- It is expanding its partner ecosystem to contribute to the GCC region's digital ecosystem. For instance, in September 2022, it partnered with the Dubai Future Foundation for Dubai Metaverse Assembly as a part of its commitment to support the Dubai Metaverse Strategy. In March 2022, it partnered with the Ministry Of Economy, the UAE, as a knowledge partner for AI, blockchain, quantum computing, and metaverse technologies.
- In August 2021, it extended its partnership with Google to launch the Accenture-Google Cloud Data and AI offering for AI and cloud transformations.
- In March 2021, it partnered with Global Ventures, a UAE-based venture capital firm, to research, get insights, and develop trends and thought leadership on how innovation drives the industries.

Capgemini: RadarView profile



Practice overview

- Practice size: 1,000+
- Active clients: 40+
- Delivery highlights: Delivered over 50 engagements

\$50M-\$100M
Digital services revenue in GCC, Jun 2022

>50%
Digital revenue growth in GCC, Jun 2022

Key digital solutions

| | |
|---|---|
| Intelligent People Operations | An analytics/automation solution to improve HR functions and provide data-driven insights |
| Digital Global Enterprise Model (D-GEM) | A platform to streamline business processes to improve the time to market and user experience |
| AI.Payables | An AI accounts payable solution to eliminate repetitive tasks for an improved purchase-to-pay |
| Intelligent Customer Interactions | An AI contact center solution to deliver human and machine-centric service design |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Leverages the metaverse to support retail clients. Drives improvement in citizen services for the Abu Dhabi Digital Authority.

Sample clients

- Abu Dhabi Executive Office (ADEO)
- First Abu Dhabi Bank
- Saudi British Bank (SABB)
- Saudi Central Bank (SAMA)
- Unilever
- A UAE-based government agency
- A public sector client in the UAE
- A UAE-based government client

Partnerships/alliances

| | |
|---|---|
| SAUDI PAYMENTS | Collaborates across the life cycle of many projects, from central bank digital currency to testing |
| TAMM خدمات المواطنين الحكومية Abu Dhabi Government Services | Drives Abu Dhabi Digital Authority's digital agenda to provide citizen services |
| MuleSoft | Delivers cloud integration platform for banking industry by leveraging open-source API connectivity |
| unity | Helps organizations leverage metaverse and immersive experiences |

Industry coverage


| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

Capgemini: RadarView profile



Case studies

| Client | Capability | Summary | Business impact |
|---|---|---|--|
| <p>A public sector client in the UAE</p> | <ul style="list-style-type: none"> • Analytics • Intelligent automation | <ul style="list-style-type: none"> • The client's internal processes were manually executed using two legacy systems on COBOL and Oracle platforms. It wanted an integrated platform backed with analytical reporting. • Capgemini leveraged the Siebel Public Sector and Oracle Policy Automation solutions to design an analytics-enabled system. It was integrated with an ERP system to present the data flow on the customer relationship management (CRM) platform as a business insight. | <ul style="list-style-type: none"> • Automated the contributions, pensions, and benefits processes • Simplified end-to-end processes using automation • Reduced costs and time by standardizing processes |
| <p>A UAE-based government agency</p> | <ul style="list-style-type: none"> • Cloud • Intelligent automation | <ul style="list-style-type: none"> • The agency wanted to streamline and automate its end-to-end recruitment system driven by manual processes. • Capgemini optimized the recruitment process across three verticals (internship, international hire, and Emiratization hire). It leveraged Taleo to implement an automation-powered recruitment system and integrated it with an on-premises HRMS system to manage data transfer to the cloud. | <ul style="list-style-type: none"> • Improved candidate selection through the automated process • Reduced recruitment cycle time • Enabled the extraction of candidate profiles within a few minutes |
|  | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The UAE Federal Government struggled with its existing IT systems that managed HR processes because of integration issues with other systems. • Capgemini leveraged the Oracle E-Business R12 HRMS Suite and business process reengineering to design an integrated IT system that automated end-to-end HR processes for government entities. It used its migration toolkit to speed up the migration of data. | <ul style="list-style-type: none"> • Streamlined performance management system process for all general category employees within the Federal Government • Enabled self-service transactions |
| <p>A UAE-based government client</p> | <ul style="list-style-type: none"> • Analytics • Intelligent automation | <ul style="list-style-type: none"> • The client wanted to align its post-clearance audit process with the new operating model and automate desk-based audit processes. • Capgemini implemented an analytics system-based audit solution that leveraged the Siebel platform to streamline the operations of the audit department. It improved compliance, tracking, measuring, and overall audit efficiency with a 360-degree view of customer trading practices. | <ul style="list-style-type: none"> • Improved risk management effectiveness • Reduced revenue leakages • Provided access to customer declarations to the audit department |

Analyst insights

Practice maturity



- Since 2007, Capgemini has been providing clients in Saudi Arabia and the UAE with services, such as advisory and consulting, application development and maintenance, package implementation, infrastructure and security, and system integration, by leveraging emerging technologies such as cloud, automation, AI, blockchain, analytics, and IoT.
- It has solved business challenges for GCC customers, including payments and exchange of banking services, value addition and customer experience, and citizen services for a better quality of life in the Emirates, by leveraging intelligent solutions, emerging technologies, and data.
- It helped a Saudi Arabia-based financial services client with a target operating model, sourcing strategy, and a multiyear road map to handle new ways of facilitating payments and accelerating the launch of new products and services. Similarly, it has helped Abu Dhabi Digital Authority by providing a digital platform for improving citizen services across the UAE region.
- It has helped retail clients implement a metaverse solution and optimize human resource processes using intelligent automation.

Investments and innovation



- It leverages future-ready technologies such as the metaverse and has set up a metaverse lab in the UAE to help clients shape and execute the metaverse strategies for clients in the region. In August 2022, it partnered with Unity, a real-time 3D solutions provider, to help GCC customers implement immersive experiences and metaverse technologies.
- It has an AI hub, Applied Innovation Exchange platform, co-innovation platform, incubators, and accelerators to design new and innovative solutions for its GCC region customers.
- It is collaborating with the government on innovative solutions, such as the future of the Saudi central bank digital currency (CBDC).

Ecosystem development



- It is collaborating with government entities, such as Saudi Payments for CBDC projects and the Abu Dhabi Digital Authority, to drive improvement in citizen services across the GCC region.
- It has strategic partnerships with technology service providers, such as AWS, Microsoft, IBM, ServiceNow, Fortinet, SAP, Oracle, Snowflake, and Micro Focus, to support solution implementation and application migration.
- It has joint marketing development programs with providers, such as Microsoft, Google, AWS, Pega, and Informatica, for sales accreditation and enablement sessions.

Coforge: RadarView profile



Practice overview

- Practice size: 300+
- Active clients: 12+
- Delivery highlights: Delivers projects through regional offices in UAE

~\$75M

Revenue from Europe, Middle East, and Africa, Mar 2022

35%

Revenue share from EMEA*, Mar 2022

Key digital solutions

| | |
|---|---|
| Security Incident Management Platform | An integrated security solution that leverages data sources to provide effective IT security |
| Cloud Security and Compliance Framework | A cloud security solution to detect and respond to threats and ensure compliance |
| MonaLisa | An airline solution suite to improve profitability using streamlined revenue accounting processes |
| tVERA | A framework to deploy bots for flight search, booking, and check-in processes |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★

Develops POC on blockchain and video analytics. Conducts innovation workshops with customers to design customer retention strategies.

Sample clients

- A government enterprise in Dubai
- A state-owned airline
- A UAE-based airline
- A destination management company
- A Dubai-based airline
- An airport in the Middle East
- A Middle East-based government airline

Partnerships/alliances

| | |
|--|---|
| | Assists travel clients in GCC to improve customer experience using Sitecore Experience Platform |
| | Supports with user interface, data storage, and a permission model across the DevOps life cycle |
| | Reduces infrastructure expenses by leveraging AWS cloud computing services |
| | Partners to increase the efficiency and productivity of enterprise applications by using automation |

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

*Note: EMEA implies the United Kingdom, Europe, and the Middle East

Case studies

| Client | Capability | Summary | Business impact |
|--|--|---|--|
| A UAE-based airline | <ul style="list-style-type: none"> • Cybersecurity • Intelligent automation | <ul style="list-style-type: none"> • The airline wanted a 24x7x365 security support services provider operating through a security operations center. • Coforge helped the airline transform its security operations and improve its audit and compliance ratings. It defined security standard operating procedures (SOPs), automated repetitive processes, and provided cybersecurity services 24x7 through a security operations center. | <ul style="list-style-type: none"> • Defined 90 SOPs • Removed over 45,000 redundant rules • Migrated 30,000 users to multi-factor authentication |
| A Dubai-based airline | <ul style="list-style-type: none"> • Cybersecurity • Network | <ul style="list-style-type: none"> • The airline wanted to improve service delivery for business continuity testing, incident and change management, and SLA management. • Coforge followed the ITILv3 process and designed the PDCA cycle to drive efficiency. It implemented network security for a firewalled solution and platform security for email encryption. It defined the RACI matrix and SLAs with the service desk team for daily operations. | <ul style="list-style-type: none"> • Managed platform and network security • Provided 24x7 support |
| An airport in the Middle East | <ul style="list-style-type: none"> • Analytics • Intelligent automation • Cybersecurity | <ul style="list-style-type: none"> • The client wanted to create a smart airport by transforming its operations and leveraging technologies such as IoT and business intelligence. • Coforge implemented an operations management platform and automated the monitoring of service-related KPIs and SLAs through dashboards and reports. It optimized airport resources using predictive analytics and enabled real-time analytics on passenger wait times. | <ul style="list-style-type: none"> • Improved passenger experience • Reduced queuing time • Improved analytics and forecasting |
| A Middle East-based government airline | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The airline wanted to upgrade its Passenger Service System (PSS) to implement e-ticket functionality and interline and codeshare booking capabilities. • Coforge designed an e-ticket module for the existing PSS on direct channels such as the website and travel agency portals. It provided interline booking partner integration and e-ticket support for alliance and codeshare partners. | <ul style="list-style-type: none"> • Added 30 new routes and increased revenue through interline and codeshare partnerships • Increased passenger in-flow • Better utilization of the fleet and resources |

Analyst insights

Practice maturity



- Since 2012, Coforge has offered GCC customers services such as advisory and consulting, proof of concept (POC) development, system integration, testing, system implementation, and application development and management.
- It leverages digital solutions to drive value for customers in the GCC region across travel, financial services, and the government sector to improve customer experience and audit and compliance ratings while reducing operational costs.
- It helps customers with the modernization of legacy systems, operations management, revenue growth, security risk and compliance assessment, and system architecture assessment. For instance, it used its Digital Sales and Marketing Assessment Model to assist a government-owned airline in improving its customer acquisition and conversion rates, thereby increasing sales by 50%.
- It is working on POC development related to emerging technologies, such as blockchain, quantum computing, video analytics, and conversational UI for its GCC customers.

Investments and innovation



- It leverages its Design Studio and Technology Incubation Centers for innovative new solutions by combining a design thinking approach with emerging technologies such as cloud, blockchain, and automation.
- It conducts joint hackathons with UAE-based GCC customers yearly to devise new and innovative solutions for business challenges. It has partnered for innovation programs with clients in the region to design solutions customized to their requirements. For instance, it had an innovation workshop with a Middle East-based government airline to design a customer acquisition and retention strategy, which led to a 100% increase in online sales.
- It has launched an employee training program that provides online training on emerging technologies.

Ecosystem development



- It has a joint go-to-market strategy with platform providers such as Automation Anywhere, AWS, Sitecore, GitLab, and AppDynamics in the GCC region. For instance, it leverages the application intelligence and performance management capabilities of AppDynamics to improve the IT systems' operational performance.
- It partners with technology solutions providers, such as Sitecore, Drupal, Xamarin, and Ionic, to improve the customers' digital experiences. It also collaborates with Automation Anywhere, UiPath, and Kofax to provide robotic process automation services to customers in the GCC region.

Cognizant: RadarView profile



Practice overview

- Practice size: 500+
- Active clients: 40+
- Delivery highlights: Delivers projects through regional offices in Qatar, Saudi Arabia, and UAE

~25%
YOY revenue
growth in GCC,
Mar 2022

4
Number of
centers in GCC

Key digital solutions

| | |
|---|---|
| Cognizant SmartMove | An IA solution to migrate legacy applications to SAP S/4HANA |
| Cognizant BigDecisions® | A data modernization solution to speed up time-to-market and improve operational efficiency |
| Cognizant Operations Intelligence Platform | A specialized solution for oil and gas to optimize oil production and reduce risk to offshore personnel |
| Cognizant Modernization Acceleration Platform | A unified platform to plan and execute modernization strategy using automation |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Improves customer experience using geotagging and spatial insights. Has set up an additional office in Qatar to support GCC clients.

Sample clients

- A Saudi Arabia-based petrochemical company
- Gulf Medical Company
- Danzas AEI
- A Middle Eastern airline company
- A UAE entertainment company
- A Middle Eastern supply chain firm
- A property and casualty insurer in the Middle East
- A federal government entity in the Middle East

Partnerships/alliances

| | |
|--|---|
| | Leverages SAP Fiori along with RFID systems to track oil products |
| | Creates targeted omnichannel customer experience using Adobe Experience Manager |
| | Drives business transformation for a university in the Middle East using SAP S/4HANA |
| | Uses Salesforce Maps solution to provide sales representatives with customer data points to increase sales productivity |

Industry coverage


| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

Cognizant: RadarView profile



Case studies

| Client | Capability | Summary | Business impact |
|---|--|---|---|
| A Middle Eastern supply chain firm | <ul style="list-style-type: none"> • Cloud • Intelligent automation | <ul style="list-style-type: none"> • The firm wanted to migrate its on-premises SAP system workloads to the Microsoft Azure cloud platform. • Cognizant leveraged its service delivery capabilities and the SAP Cloud Assessment and Transformation framework to migrate production system workloads to the Microsoft Azure cloud platform. | <ul style="list-style-type: none"> • Reduced manual effort by 30% using automation • Reduced annual IT infrastructure spending by 20% |
| A Saudi Arabia-based petrochemical company | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The company was struggling with poor process synchronization and complex manual operations. • Cognizant designed a proof of concept using SAP Extended Warehouse Management and radio frequency identification solutions to track the products and bring visibility into warehouse operations. It implemented SAP finance modules to reduce the ledger consolidation period and the SAP HCM solution to improve the company's benefit systems. | <ul style="list-style-type: none"> • Increased warehouse efficiency by 200% using automation • Increased operational efficiency by 30% • Annual cost savings of \$5.6M |
|  | <ul style="list-style-type: none"> • Analytics • Cloud • Intelligent automation | <ul style="list-style-type: none"> • Danzas AEI wanted to reduce revenue leakages and modernize its legacy enterprise resource planning (ERP) systems. • Cognizant implemented analytics-enabled Oracle Cloud modules to reengineer business processes and reduce revenue leakage. It also automated supplier management and procurement to analyze spending. | <ul style="list-style-type: none"> • Reduced revenue leakage using automation • Improved agility by migrating the on-premises ERP platform to the cloud |
| A federal government entity in the Middle East | <ul style="list-style-type: none"> • Blockchain | <ul style="list-style-type: none"> • The government entity wanted to improve citizen services by eliminating the use of printed documents. • Cognizant designed a citizen vault solution using blockchain technology and onboarded citizens and government departments onto the platform to streamline citizen services without paper-based transactions. | <ul style="list-style-type: none"> • Improved citizen services such as the opening of bank accounts • Achieved cost efficiencies by removing manual paper-based processes |

Analyst insights

Practice maturity



- With offices in the UAE, Saudi Arabia, and Qatar, Cognizant offers its GCC customers consulting, developing proofs of concept, integrating systems, implementing solutions, testing, and application development and maintenance services.
- It leverages its expertise in emerging technologies, such as blockchain, IoT, cloud, intelligent automation, and advanced analytics, to streamline business processes and improve customer experience. For instance, it leveraged analytics to create an insights platform that utilized geotagging and spatial data to improve the customer experience for a UAE-based entertainment company.
- It uses partner capabilities to help GCC customers across the public sector, banking, oil and gas, insurance, travel, telecom, media, and entertainment become digital enterprises and improve their day-to-day operations. For instance, it implemented SAP® SuccessFactors and ERP Central Component software for Riyadh International Catering Corporation to help McDonald's fast-food chain in Saudi Arabia streamline its supply chain and food and workforce processes.

Investments and innovation



- In March 2022, it expanded its GCC operations by opening an additional office in Qatar to improve support for regional customers. It plans to hire new employees in Qatar to augment its digital, AI, robotics, and cloud capabilities.
- It has started digital programs for interns and corporates and campus programs for undergraduates, graduates, and postgraduates in Saudi Arabia and the United Arab Emirates to develop the region's technology talent. It also conducts Cognizant Community events, a C-level thought leadership event in the Middle East for idea sharing and networking.
- It leverages Cognizant Academy, which comprises technical, talent development, and classroom facilities, to support its GCC clients in innovation.

Ecosystem development



- It leverages its vast partner network with technology solutions providers, such as SAP, Oracle, IBM, Informatica, Adobe, UiPath, Pega, Cisco, and Salesforce, to improve customer experience and operational efficiency, reduce costs, and cloud migration of applications. For instance, it utilized SAP Fiori apps to improve employee experience and user interface for the Gulf Medical Company.
- It has partnered with cloud service providers such as Microsoft Azure, AWS, and Google Cloud to migrate applications to the cloud and improve operational efficiency. For instance, it leveraged Microsoft Azure cloud to create a unified identity management system that improved customer engagement through digital channels for a UAE-based entertainment company.

DXC: RadarView profile



Practice overview

- Practice size: 400+
- Active clients: 200+
- Delivery highlights: Has been delivering digital services in GCC for about five years

| | |
|---|---|
| ~\$5,117M Revenue from EMEA*, March 2022 | 3 Percentage points growth in EMEA revenue share, YOY 2021 |
|---|---|

Key digital solutions

| | |
|----------------------------------|---|
| DXC Platform X™ | A platform leveraging AI and IA to detect IT issues and enable self-healing of customer's IT infrastructure |
| DXC Bionix™ | A platform to help improve the delivery performance of IT services by leveraging IA, AI, and analytics |
| DXC Open Health Connect | A platform to improve quality of care by enabling a quick flow of data between healthcare systems |
| DXC Intelligent Testing Platform | A platform using IA and analytics to improve quality posture |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Sample clients

- The Makkah Region Development Authority (MRDA)
- Union Insurance
- Al Ahli Holding Group
- A bank in the UAE
- A Manilla-based fast-food chain in Saudi Arabia
- Ain Al Khaleej Hospital

Partnerships/alliances

| | |
|------------|--|
| Virbela | Collaborated with Virbela to utilize its virtual world experience for metaverse events |
| aws | Partnered to modernize legacy apps by migrating them to AWS Cloud for security and efficiency |
| dynatrace | Partnered to use the Dynatrace platform to reduce time between cloud decision and deployments |
| servicenow | Partnered to use the ServiceNow platform to digitize processes and improve customer experience |

Industry coverage





| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Leverages augmented reality to help Hajj pilgrims find nearby activities. Collaborates with Meta, Microsoft, and Virbela to conduct metaverse events.

Darker color indicates higher industry concentration: ●●●●●

*Note: EMEA implies Europe, Middle East, and Africa

Case studies

| Client | Capability | Summary | Business impact |
|---|---|--|--|
|  <p>هيئة تطوير منطقة مكة المكرمة Makkah Region Development Authority</p> | <ul style="list-style-type: none"> Analytics Augmented reality | <ul style="list-style-type: none"> MRDA wanted to improve pilgrims' visiting schedule and reduce overcrowding at stations on the Al Mashaaer Al Mugaddassah Metro Southern Line. DXC implemented a bilingual Staff Management and Pilgrim Dispatch Application System for managing the crowd and supporting ground staff. It launched a 24x7 Crowd Control Command Centre to cover the event and provide real-time analytics updates to MRDA by analyzing 23M data points. It designed the iHajj application for finding nearby activities via augmented reality and receiving <i>Du'a</i> requests from family. | <ul style="list-style-type: none"> Helped determine a suitable location for deploying ground staff Enabled communications between ground staff and their supervisors for smooth operations Offered effortless crowd tracking Provided smooth end-to-end experience to pilgrims via the iHajj application |
|  <p>الاتحاد للتأمين UNION INSURANCE</p> | <ul style="list-style-type: none"> Cloud | <ul style="list-style-type: none"> The insurer wanted to migrate its legacy IT infrastructure and applications to AWS Cloud to improve customer experience. DXC designed a cloud migration strategy to help the insurer migrate its data center IT infrastructure and applications to AWS Cloud while ensuring business continuity. It also improved application performance, security, and a scalable backend IT infrastructure. | <ul style="list-style-type: none"> Augmented overall IT effectiveness Improved customer experience Enhanced flexibility to meet customer demand |
|  <p>مجموعة الإمارات EMIRATES GLOBAL HOLDING GROUP</p> | <ul style="list-style-type: none"> Analytics Intelligent automation | <ul style="list-style-type: none"> The group wanted to improve customer experience and support UAE's economic growth by leveraging digital technologies. DXC implemented an SAP S/4HANA business suite to optimize business processes and enabled analytics-/automation-based dashboards to improve customer experience, sales forecasting, and operations. | <ul style="list-style-type: none"> Improved management decision-making through dashboard reports Optimised supply chain Improved operational efficiency |
|  <p>مستشفى عين الخليج Ain Al Khaleej Hospital</p> | <ul style="list-style-type: none"> Intelligent automation | <ul style="list-style-type: none"> The hospital wanted to eradicate paper documentation, become a paperless hospital, and have an electronic record of patients. DXC implemented the Electronic Patient Records system that enabled the hospital to become paperless using automation and helped it achieve Health Information Management Systems Society Stage 6 certification for providing quick services to patients. | <ul style="list-style-type: none"> Improved patient services by making processes paperless Safeguarded patients with electronic records Reduced operational costs |

Analyst insights

Practice maturity



- With over five years of experience serving customers in the Middle East, DXC provides IT services such as advisory and consulting, application development and maintenance, system integration, and solution implementation to customers across the private and public sectors.
- It leverages emerging technologies such as cloud, automation, advanced analytics, and augmented reality to improve customer experience, management decisions, operational efficiency, and stakeholder communication. For instance, it designed the iHajj application for pilgrims that leveraged augmented reality to help them find activities nearby.
- It also helps regional customers migrate their legacy IT infrastructure to the cloud for enhanced security, reduced operational costs, and increased operational efficiency. For instance, it helped Union Insurance migrate its IT applications to the AWS cloud to improve customer experience and overall IT effectiveness.
- It leveraged SAP S/4HANA to optimize business processes to improve the customer experience and optimize costs for Al Ahli Holding Group.

Investments and innovation



- It has invested heavily in immersive and 3D technologies to conduct successful metaverse events by collaborating with Meta and Microsoft. For instance, in 2022, it hosted a metaverse-based virtual sales conference for EMEA sales professionals.
- It has acquired Sable37, a Microsoft Dynamics 365 value-added reseller, and eBECS, a provider of Microsoft business solutions, to augment its Microsoft Dynamics Cloud capabilities in Saudi Arabia and the UAE.
- In 2022, it hosted a virtual Code to Care Hackathon event for its EMEA employees to develop innovative solutions. It has an EMEA Early Careers Programme to provide training and development opportunities to local talent and help them kickstart their career.

Ecosystem development



- It has partnered with Virbela, a company that builds virtual worlds, to develop a metaverse-based DXC Virtual World platform, a private virtual campus, to help customers with an immersive experience.
- It has partnered with cloud service providers, such as Microsoft and AWS, to help regional customers migrate to the cloud to improve IT infrastructure security and reduce infrastructure maintenance costs.
- It has expanded its partner ecosystem with partners such as SAP, ServiceNow, Oracle, Pega, Dynatrace, VMware, Red Hat, IBM, and Micro Focus to help customers optimize business processes, improve IT effectiveness, and ensure a seamless user experience.

e& enterprise: RadarView profile

e& enterprise



Practice overview

- Practice size: 1,500+
- Active clients: 6,250+
- Delivery highlights: Delivers digital projects for enterprises and governments regionally in UAE and KSA

| | |
|------------------------------------|------------------------|
| \$490M Revenue in GCC, Dec 2021 | 24% CAGR since 2015 |
|------------------------------------|------------------------|

Key digital solutions

| | |
|--------------------------|--|
| UAE Trade Connect (UTC) | A fintech platform that uses blockchain to detect fraudulent and duplicate invoices in trade financing |
| Cyber Edge X | A cloud solution for enterprise networking and security to protect user data and applications |
| EngageX Campaign Manager | A platform to create and analyze marketing campaigns |
| Connected Worker | An IoT solution to connect workforce, machinery, and tools to ensure labour health and safety |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★
- Ecosystem development ★★★★★

Provides cloud, cybersecurity, AI, and IoT solutions to help regional clients become smart, safer, and sustainable.

Sample clients

- Juma Al Majid Holding Group
- Al Qana
- Mohammad Bin Rashid Library
- American Hospital
- Dubai Municipality
- Emirates National Oil Company Group (ENOC)
- A UAE-based healthcare group
- Dubai Multi Commodities Centre (DMCC)
- Abu Dhabi University
- Union Insurance
- ADNOC Sour Gas
- Sharjah University

Partnerships/alliances





| | |
|----------------------|---|
| BESPIN GLOBAL | Joint venture with Bospin Global to offer cloud-managed services in the METAP region |
| | Collaborated with G42 to launch Khazna Data Centers in the UAE |
| | Launched enterprise AI as a service to support organizations in their digital initiatives |
| | Launched the Cyber Eye initiative to enhance the government's cybersecurity capabilities |

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

Case studies

| Client | Capability | Summary | Business impact |
|---|--|---|--|
|  | <ul style="list-style-type: none"> • Analytics • Augmented reality (AR) • Cloud • Intelligent automation | <ul style="list-style-type: none"> • Mohammad Bin Rashid Library wanted to preserve the UAE’s heritage and build a knowledge-based community by providing digital solutions. • e& enterprise created an Etisalat E1Cloud-hosted intelligent books management portal to automate searching and borrowing books. It provided smart robots to catalog, maintain, and retrieve books and greet customers. It also designed a predictive analytics recommendation engine to suggest books and deployed AR tools to engage customers. | <ul style="list-style-type: none"> • Simplified searching and borrowing of books • Reduced human intervention • Improved learning experience with AR • Enhanced cultural experience for visitors |
|  | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • Dubai Frame wanted to provide a seamless experience for its visitors by leveraging smart solutions. • e& enterprise implemented smart ticketing solutions through the website, app, ticketing window, and smart kiosks to improve customer experience. It provided smart handheld scanner devices to Dubai Frame employees to scan visitors’ tickets for entry and used smart retail solutions to optimize payments for purchasing gifts from Dubai Frame shops. | <ul style="list-style-type: none"> • Eliminated long wait times • Improved the visitor experience • Streamlined the payment process at Dubai Frame’s gift shops |
|  | <ul style="list-style-type: none"> • Analytics • AI • Cybersecurity • IoT | <ul style="list-style-type: none"> • The Emirates National Oil Company (ENOC) wanted to improve the operational efficiency of oil stations by making them smart. • e& enterprise leveraged its advanced AI security solutions to secure oil stations. Its retail and customer analytics offerings enabled data-driven decisions, while its IoT solutions, such as smart metering and parking, streamlined the operations of oil stations. | <ul style="list-style-type: none"> • Provided visitor insights into oil stations • Improved operational efficiency of oil stations |
|  | <ul style="list-style-type: none"> • Analytics • Network • IoT | <ul style="list-style-type: none"> • Al Qana wanted to improve customer experience by using smart solutions. • e& enterprise provided wired and wireless network connectivity and leveraged Wi-Fi analytics to gather valuable customer insights for the Al Qana team. It also designed a smart parking solution using IoT to assist customers in finding available parking slots. | <ul style="list-style-type: none"> • Improved customer experience • Helped customers find parking slots |

Analyst insights

Practice maturity



- e& enterprise has been leading the digital transformation journeys for organizations and government entities since 2016 and has been involved in some of the biggest projects in the GCC region. It leverages cloud, cybersecurity, AI, and IoT to provide innovative solutions to regional clients for safer and smart cities, sustainable development, connected healthcare, advanced banking operations, better citizen services, and automated industries.
- It provides cloud platforms, including Etisalat OneCloud, hosted locally across nine data centers in Abu Dhabi and Dubai. It offers agile service models with 24x7 maintenance and operational support. It has active smart connections, such as over 400K connected vehicles, more than 22K smart city data points, 30K connected homes, and 8K connected cameras linked to its IoT and AI platforms.
- It provided wired and wireless network services in Al Qana, a waterfront destination, to ensure that its visitors have access to the internet throughout their stay. It also offered insights to Al Qana engineers using Wi-Fi analytics to improve customer experience. Similarly, it helped Dubai Multi Commodities Centre transform the Jumeirah Lake Towers area into Dubai's first 5G-powered smart district to enhance residents' experience.

Investments and innovation



- In October 2022, it acquired Smartworld, a UAE-based technology solutions provider and systems integrator, to strengthen its IoT and AI capabilities.
- In May 2022, it launched the Middle East region's first non-fungible token collection for its customers to show its commitment to innovation in blockchain technology. It has a FutureNow program for innovation, where it collaborates with over 500 startups. It is also a part of the UAE Trade Connect consortium that uses blockchain to detect duplicate and fraudulent invoices in trade financing.
- In 2021, it launched the Etisalat AI Graduate Programme to recruit Emirate graduates for a nine-month skill development program through a hackathon. It also offers iQra, an AI-driven learning platform for employees to upskill themselves.

Ecosystem development



- In January 2022, it partnered with the Abu Dhabi Digital Authority and Trend Micro to launch the Cyber Eye initiative to strengthen the cybersecurity capabilities of Abu Dhabi Government entities. In February 2022, it partnered with NICE to bring the CXone cloud platform to provide agent-assisted and self-service customer experience to its UAE customers.
- In June 2022, it partnered with DataRobot to deliver AI-as-a-Service solutions. Around the same time, e& enterprise and G42 agreed to merge their respective data center assets under Khazna Data Centers to become the biggest data center provider in the Middle East and support the creation of a digital ecosystem. In August 2022, it completed the region's first 6GHz trial with Huawei Technologies to boost metaverse and 5G development.

Emitac Enterprise Solutions: RadarView profile



Practice overview

- Practice size: 750+
- Active clients: 250+
- Delivery highlights: Delivered over 300 projects

2

Number of centers in GCC

>43 years

Of presence in the Middle East

Key digital solutions

| | |
|------------------------|--|
| Nextthink | An IT analytics solution to provide IT compliance insights through dashboards and reports |
| Reflexion ExpressQUOTE | An automated quotation system to create and send proposal by calculating cost parameters |
| Reflexion FieldINSPECT | A process and quality inspection solution to manage audit and inspection for manufacturers |
| Reflexion CardNEXT | A platform to manage credit card operations to improve aftersales services and regain lost customers |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★
- Investments and innovation ★★★
- Ecosystem development ★★★

Has increased storage capacity for Al Fara'a through a virtual platform. Conducts interactive workshops around cybersecurity for customers.

Sample clients

- Abu Dhabi Judicial Department (ADJD)
- A regional healthcare provider
- Ministry of Health, UAE
- Ajman Chamber
- UAE Football Association
- Desert Group
- Saudi German Hospital
- Al Fara'a
- A global oil and gas company in the Middle East

Partnerships/alliances

| | |
|--|--|
| | Partnered to deliver Delphix's automated DevOps solutions in the UAE for rapid innovation |
| | Teamed up to use its business optimization and data analytics capabilities for Middle East clients |
| | Collaborated to migrate SAP workloads and applications to Azure for regional customers |
| | Deployed analytical reports by using Oracle Business Intelligence Enterprise Edition platform |

Industry coverage



| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

Emitac Enterprise Solutions: RadarView profile



Case studies

| Client | Capability | Summary | Business impact |
|---|---|--|---|
|  <p>وزارة الصحة MINISTRY OF HEALTH</p> | <ul style="list-style-type: none"> Analytics | <ul style="list-style-type: none"> The government wanted to standardize and centralize IT systems to reduce costs and improve efficiency. Emitac implemented Nexthink, an IT analytics solution, to provide IT infrastructure visibility and compliance and governance insights through dashboards and reports. It helped the IT team to manage the effectiveness of IT support, security, and operations. | <ul style="list-style-type: none"> Standardized IT infrastructure Increased cost saving Improved asset monitoring accuracy |
| <p>A regional healthcare provider</p> | <ul style="list-style-type: none"> AI | <ul style="list-style-type: none"> The provider wanted a unified solution by integrating core business systems to maintain patient records and improve the patient experience. Emitac designed an AI platform that enabled a multimedia dashboard for archiving and reporting patient records to enhance the patient experience. | <ul style="list-style-type: none"> Improved patient experience with a 99.9% system uptime commitment Provided insights-based reports for patients |
|  <p>دائرة القضاء JUDICIAL DEPARTMENT</p> | <ul style="list-style-type: none"> Analytics Intelligent automation | <ul style="list-style-type: none"> ADJD wanted to automate over 30 business processes and ensure compliance with due-process workflows. It also wanted an integrated case management system to give access to employees and registered citizens. Emitac leveraged Oracle's Siebel Case Management solution to design an integrated public prosecution management system (PPS) and leveraged Siebel's integration and e-service capabilities to deploy new e-services rapidly. It automated processes through PSS. It used Oracle Business Intelligence Enterprise Edition to deploy analytics-based reports. | <ul style="list-style-type: none"> Reduced paper handling with the automation of processes Reduced data transfer time by integrating systems Improved decision-making through analytical reports |
| <p>A global oil and gas company in the Middle East</p> | <ul style="list-style-type: none"> Cloud Intelligent automation | <ul style="list-style-type: none"> The company wanted an integrated and unified solution to enhance customer experience and reduce CAPEX and administration costs. Emitac leveraged automation, storage-defined network, and storage-defined services for an on-premises cloud-based unified solution. It integrated multiple systems and provided accelerated services. | <ul style="list-style-type: none"> Reduced administrator costs Enhanced operational efficiency Improved agility while maintaining data security |

Analyst insights

Practice maturity



- With over 43 years of experience serving customers in the Middle East across private and public sectors, it offers services such as advisory and consulting, system integration, testing-as-a-service, data center optimization and consolidation, application development and management, and database management.
- It leverages emerging technologies such as advanced analytics, network, AI, cybersecurity, and intelligent automation to solve complex business challenges such as reducing operational costs, setting up network infrastructure, increasing project visibility, and migrating legacy systems. For instance, it overhauled the IT server and storage infrastructure for Al Fara'a by designing a virtual platform, which reduced rack space requirements by 50% and increased storage capacity by 40%.
- It helped Dubai Islamic Bank design, test, and implement an integrated solution to improve operational efficiency. It also helped the Desert Group migrate its systems to Microsoft Office 365 to reduce administration and operational costs.

Investments and innovation



- It focuses on investing in building partnerships with providers to support regional customers with their innovation strategies.
- It has conducted interactive customer workshops in Abu Dhabi, UAE, around next-generation cybersecurity solutions in collaboration with the CyberRes line of business of Micro Focus.

Ecosystem development



- It has built a strong partner ecosystem with providers such as SAP, Oracle, Accuras, 3i Infotech, Lenovo, and Micro Focus to help regional customers improve their operational efficiency. For instance, it partnered with Oracle to leverage its Oracle Business Intelligence Enterprise Edition platform to deploy analytical key performance indicator-based reports for Abu Dhabi Judicial Department.
- It partnered with Huawei to migrate legacy systems and design data centers and network infrastructures for customers in the Middle East. It also partnered with Aruba Networks to leverage its network technology capabilities to help TECOM Investments with a centralized network system for improved network connectivity and better customer experience.

GBM: RadarView profile



Practice overview

- Practice size: 1,300+
- Active clients: 10+
- Delivery highlights: Has been delivering digital services in GCC for over 30 years

| | |
|--------------------------|--------------------------------|
| 6 | 24/7 |
| Number of centers in GCC | Services offered by GBM Shield |

Key digital solutions

| | |
|--|--|
| GBM Shield | A solution to help organizations improve security posture and cyber resiliency |
| Customer Organizational Growth framework | A framework to align business engagement with customer engagement to deploy technologies for customer growth |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Sample clients

- Sinnad
- Oman Arab Bank
- Brokerage House Securities
- Kuwait Airways
- Mashreq Bank
- Hamad Medical Corporation
- Zain Bahrain
- National Bank of Oman
- National Bank of Fujairah
- Daman
- Bahrain Airport Company

Partnerships/alliances

| | |
|--|---|
| | Partnered to leverage SNP's data transformation capabilities to help SAP clients with cloud migration |
| | Collaborated to implement AI projects in the Smart City Platform, an AI consortium in Oman |
| | Partnered to use its capabilities to deliver digital services and IT road maps for UAE Vision 2030 |
| | Collaborated with Cisco to provide IT skills to Bahraini students with special needs |





Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Leverages Cisco Systems technology to integrate healthcare systems. Uses its Executive Education Program to develop senior management skills.

Darker color indicates higher industry concentration: ●●●●●

Case studies

| Client | Capability | Summary | Business impact |
|---|--|---|---|
|  | <ul style="list-style-type: none"> Intelligent automation | <ul style="list-style-type: none"> The airline wanted a solution to transform its end-to-end payroll and time management system. GBM implemented an integrated HCM solution that leveraged SAP's payroll and time management systems. It also used IBM BPM and IBM middleware software. IBM BPM automated 22 rules-based HR approval processes, and IBM Cast Iron processed data between systems by serving as an integration layer. | <ul style="list-style-type: none"> Reduced payroll time from three days to three minutes Automated monthly generation of 80 HR-specific file types Enabled 18 integrations with internal or external systems |
|  | <ul style="list-style-type: none"> Analytics Intelligent automation | <ul style="list-style-type: none"> The bank faced challenges pertaining to capacity restrictions for maintaining separate systems and executing processes to integrate data from multiple systems. It wanted a solution to overcome the issues and integrate it with Oracle Financial Services Analytical Applications (OFSAA). GBM implemented an analytics-based IBM Cognos TM1 solution and integrated it with OFSAA to automate manual processes to ensure seamless movement of data between the existing IBM Cognos Enterprise Planning system and the new solution. | <ul style="list-style-type: none"> Enabled handling of large volumes of financial data Ensured real-time data movement with no interim steps Accelerated time to value |
|  | <ul style="list-style-type: none"> Cybersecurity Intelligent automation Network | <ul style="list-style-type: none"> Sinnad wanted a secure IT services network infrastructure to deliver business applications faster. GBM designed a secure network infrastructure by leveraging Cisco data center technologies to automate manual tasks and deploy business applications at a faster rate. | <ul style="list-style-type: none"> Improved business agility by leveraging automation Accelerated the data center application deployment process |
|  | <ul style="list-style-type: none"> Cybersecurity | <ul style="list-style-type: none"> The firm wanted a secure data center that leveraged digital technologies to store and secure customer financial trading data. GBM designed a secure data center for the firm that helped it store customers' trading data for a minimum of ten years according to regulations of the Securities and Commodities Authority. | <ul style="list-style-type: none"> Transformed trading data storing processes Provided post-sale services to manage data center |

Analyst insights

Practice maturity



- With over 30 years of experience serving customers in the Middle East, Gulf Business Machines (GBM) offers digital services such as advisory consulting, application development and maintenance, solution implementation, and system integration across banking and financial services, insurance, travel, and healthcare sectors.
- It leverages emerging technologies such as cloud, intelligent automation, network, cybersecurity, and advanced analytics to improve customer experience, operational efficiency, and security posture. For instance, it automated health information systems for Qatar's Hamad Medical Corporation (HMC) to optimize internal processes and improve healthcare delivery and operational efficiency. It also helped HMC migrate to Cisco System's Gigabit Ethernet network and installed an integrated system at HMC to connect 23 health centers and three main hospitals.
- It assessed the existing banking offerings of UAE's National Bank of Fujairah and implemented a new core banking solution to offer innovative banking products, new delivery channels, and improved customer service.

Investments and innovation



- In September 2022, it acquired Coordinates Middle East, a cybersecurity service provider, to augment its cybersecurity capabilities in the region by leveraging Cor., Coordinates' automated detection and response service platform.
- It has collaborated with Cisco Networking Academy to develop the IT skills of Bahraini students with special needs. It has also offered Cisco Certified Network Associate staff training to broadband specialists and network engineers of Zain Bahrain.
- In October 2020, it partnered with London Business School to conduct an Executive Education Program to help its senior management develop behavioral, operational, and strategic skills.

Ecosystem development



- It has partnered with the Ministry of Technology and Communications and The Research Council, Oman, to implement AI-related projects for industry 4.0 within the Smart City Platform, an AI consortium in Oman.
- It has partnered with regional provider Injazat to leverage its local capabilities to accelerate digital transformation journeys for GCC customers in alignment with UAE Vision 2030.
- It has expanded its partner ecosystem with providers such as SAP, Salesforce, Schneider Electric, SNP, Virtual Bridges, Cisco, and IBM. For instance, it partnered with Schneider Electric to leverage its data center infrastructure management solution for Daman for efficient operations.

HCLTech: RadarView profile

HCLTech



Practice overview

- Practice size: 400+
- Active clients: 25+
- Delivery highlights: 50+ projects delivered

| | |
|---|---|
| 40% Digital revenue growth in GCC, June 2022 | ~60% Client growth in GCC, June 2022 |
|---|---|

Key digital solutions

| | |
|-------------------|--|
| Fenix™ 2.0 | A digital data-driven execution framework to provide a digital strategy road map to customers |
| MetaFinity | An XRStudio platform using OBOL tokenization framework-based repository with pre-built algorithms, integrations, and DIY avatars |
| SecIntAI | A solution using AI and analytics to identify threats in the IT landscape |
| DRYiCE MyXalytics | A reporting and dashboard solution to help enterprises review the performance of their IT systems |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Contributes to the land and property megaproject in Saudi Arabia. Codevelops blockchain solutions with partners for tracking products.

Sample clients

- A UAE-based Islamic bank
- A Saudi Arabia-based bank
- A Qatar-based airline company
- A nuclear energy organization
- A Saudi Arabia-based pharma company
- A UAE-based metals manufacturing company
- A lighting and illumination corporation
- A ministry of the Saudi Arabian government

Partnerships/alliances

| | |
|--|---|
| | Uses Alteryx's automation and analytics capabilities for the cloud transformation journeys of clients |
| | Reduced oil and gas workplace incidents using alerts from the Smart Safety Solution |
| | HCLTech's Gold BluePrint leverages ServiceNow's ITSM offering for go-to-market offerings |
| | Partners with SAP for innovation in blockchain, S/4HANA, and SAP Leonardo solutions |

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

Case studies

| Client | Capability | Summary | Business impact |
|--|--|--|--|
| A Saudi Arabia-based pharma company | <ul style="list-style-type: none"> • Analytics • Cybersecurity • Intelligent automation | <ul style="list-style-type: none"> • The pharma company wanted to set up a security operations center to enable 24x7 security monitoring. • HCLTech leveraged its SecIntAI solution that utilized a security information and event management platform to automate the integration of internal and external intelligence feeds. It also enabled 24x7 security monitoring from its Cybersecurity Fusion Centers. | <ul style="list-style-type: none"> • Automated security operations • Improved incident response time |
| A UAE-based metals manufacturing company | <ul style="list-style-type: none"> • Cybersecurity • Intelligent automation | <ul style="list-style-type: none"> • The company wanted to eliminate cyber blind spots in its IT infrastructure and become security compliant through effective threat detection. • HCLTech leveraged its Vulnerability Management for Enterprise Security (VERITY) framework to assess the vulnerability and governance of the security infrastructure. It automated patch fixing to ensure compliance and performed breach attack simulation for threat detection. | <ul style="list-style-type: none"> • Provided 24x7 security operations • Presented a unified view of the security dashboard for CXO reporting |
| A lighting and illumination corporation | <ul style="list-style-type: none"> • AI • Intelligent automation | <ul style="list-style-type: none"> • The corporation wanted to build a connected installed base system to manage IoT lighting devices and service operations. • HCLTech set up a remote operations center and leveraged DRYiCE solutions with AI and automation capabilities for service operations. It implemented a service management architecture to customize IT management according to business needs. | <ul style="list-style-type: none"> • Increased compliance by reducing SLA breaches by 60% • Saved costs by reducing field engineer maintenance trips • Managed over two million lighting fixtures |
| A ministry of the Saudi Arabian government | <ul style="list-style-type: none"> • AI • Intelligent automation | <ul style="list-style-type: none"> • The Saudi ministry wanted an integrated system, as multiple vendors managed its applications and lacked SLA-based delivery. • HCLTech designed an integrated operating model for application and infrastructure operations. It defined the KPIs and SLAs for effective reporting and operations. It leveraged a continuous integration and delivery pipeline to automate the testing and delivery of the model. | <ul style="list-style-type: none"> • Reduced average handling time by 8%-10% • Reduced service desk incidents by 35%-40% |

Analyst insights

Practice maturity



- HCLTech began its operations in the GCC region in 2010, but the Middle East became its focus market in 2017. It has built a strong local presence by establishing its regional headquarter in Dubai, the UAE.
- It has delivered services to GCC customers across consulting, POC development, package implementation, system integration, and application development and maintenance by leveraging technologies such as AI and analytics, intelligent automation, cloud, blockchain, IoT, and cybersecurity.
- It solves business challenges across sectors such as financial services, government, travel, manufacturing, telecom, and utilities. For instance, in alignment with the Saudi Vision 2030, it implemented a CI/CD pipeline by leveraging the DevOps framework for a ministry in Saudi Arabia.
- It is strengthening its capabilities in future technologies such as the metaverse. It has developed a MetaFinity solution that leverages the XRStudio platform and OBOL tokenization framework for metaverse use cases such as virtual banking, meta events, meta store, and meta training.
- It works with GCC governments on land and property megaprojects and local government projects.

Investments and innovation



- It has established Wave4IoT, an IoT lab in Riyadh, the Kingdom of Saudi Arabia (KSA), in collaboration with Advanced Telecommunications Solutions and Services to speed up the digital journeys of the government and private sector by using IoT solutions. In the KSA, it plans to set up a cybersecurity lab for threat intelligence solutions and a fintech lab to help finance firms test and refine their offerings.
- It started the Hack2Hire Hackathon program in August 2022 to onboard local resources and develop talent in the Middle East. In the UAE, it partners with local institutes to conduct skill development. It also ties up with local universities to promote IT skills among students and aligns itself with Saudization mandates in Saudi Arabia. In Bahrain and Oman, it hires local talent from universities and conducts training programs to upskill them.

Ecosystem development



- It has built partnerships with technology providers such as AWS, Microsoft, Google, SAP, Salesforce, and Oracle for digital transformation solutions and with Adobe, UiPath, Sitecore, Pega, Appian, and Mulesoft for product implementation to serve customers in the GCC region.
- It has early access to startup technologies through Morado Ventures. It has various centers of excellence with partners such as Snowflake and Google.
- It has co-developed solutions with its partner network. For instance, it has built a Smart Safety solution for occupational workers and a blockchain-integrated trace and track solution with IBM. Similarly, it collaborated with AWS for ReServ, a remote services platform, and with Harris for a geographic information system and spatial image analytics solution for power distribution, rail tracks, and pipeline monitoring.

IBM: RadarView profile



Practice overview

- Practice size: 2,600+
- Active clients: 200+
- Delivery highlights: Delivers projects through regional offices in Saudi Arabia and UAE

| | |
|--|---|
| \$17.47B Revenue from EMEA*, Dec 2021 | 4.1% YOY change in EMEA* revenue, Dec 2021 |
|--|---|

Key digital solutions

| | |
|--------------------------------|---|
| Maximo Application Suite | A cloud platform that leverages AI, IoT, and analytics to manage enterprise assets |
| NextGen Common Travel Services | A cloud platform with prebuilt APIs to reduce application deployment time |
| IBM® Cognos Controller | A cloud solution for finance teams to automate consolidation and reporting processes for businesses |
| IBM Micromedex with Watson™ | A cloud solution that uses IBM Watson to create clinical benchmarking dashboards |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Automates data collection processes through IBM Cognos Controller solution.
Improves citizen services using client engineering teams.

Sample clients

- Emaar Properties PJSC
- Abu Dhabi Islamic Bank
- Petroleum Development Oman LLC
- Tatweer Building Company
- Alinma Bank
- Kuwait Oil Company
- Global Payment Services (GPS)
- Smart Dubai
- The Ministry of Interior, State of Qatar
- Etihad Airways

Partnerships/alliances

| | |
|--|---|
| | Leverages the AI-optimized G42 cloud platform for clients' digital transformation |
| | Collaborates with SDAIA and the Ministry of Energy to reduce carbon emissions in Saudi Arabia |
| | Collaborates with Mawani to provide online training to employees of Saudi ports |
| | Drives innovation in AI through a center of excellence and skill development |

Industry coverage





| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

*Note: EMEA implies Europe, Middle East, and Africa

IBM: RadarView profile

Case studies

| Client | Capability | Summary | Business impact |
|---|--|--|---|
|  | <ul style="list-style-type: none"> Intelligent automation | <ul style="list-style-type: none"> Emaar Properties PJSC wanted to streamline its back-office operations, reduce staffing costs, and free up employee hours to work on value-added tasks. IBM worked with Emaar's IT team to focus on transaction processes such as invoicing and receipt management to create more value by leveraging automation. It developed a business case and deployment plan to implement RPA across the back-office operations. | <ul style="list-style-type: none"> Automated 86% of processes Reduced staffing costs by 40% Reduced process turnaround time by 50% |
|  | <ul style="list-style-type: none"> AI | <ul style="list-style-type: none"> Smart Dubai wanted to leverage new technologies to transform how it provides government services to the citizens of Dubai. IBM helped Smart Dubai launch Rashid, a chatbot, by leveraging IBM Watson Assistant to guide Dubai citizens in getting the required licenses and funding for setting up a new business. | <ul style="list-style-type: none"> Assisted Dubai citizens with government services Guided citizens on the business setup process |
|  | <ul style="list-style-type: none"> Cloud | <ul style="list-style-type: none"> Etihad Airways wanted to modernize its web check-in application to provide an improved travel experience for its customers. IBM leveraged IBM NextGen Common Travel Services solution on IBM Cloud to create a new web check-in application for Etihad Airways. It uses microservices and IBM API Connect to integrate existing backend systems with the new web check-in functionality to improve the travel experience. | <ul style="list-style-type: none"> Reduced application delivery time from nine months to 15 weeks Generated 4,000 email boarding passes daily Generated 1,700 WhatsApp boarding passes daily |
|  | <ul style="list-style-type: none"> Intelligent automation | <ul style="list-style-type: none"> The Abu Dhabi Islamic Bank wanted to personalize its digital marketing engagement and create upselling and cross-selling opportunities by transforming its siloed IT infrastructure. IBM leveraged IBM Watson Campaign Automation, a digital marketing platform that used data to create and launch personalized offers and campaigns. It integrated the bank's backend systems and marketing data warehouses to provide a secured digital engagement solution. | <ul style="list-style-type: none"> Reduced the time-to-market for digital campaigns Generated 20% new business through the digital channel |

Analyst insights

Practice maturity



- IBM provides consulting, system testing, system integration, package implementation, and application development and maintenance services to customers across the GCC region by leveraging emerging technologies such as cloud, automation, AI, blockchain, analytics, and IoT.
- It has solved business challenges for GCC customers by applying a design-thinking approach. For instance, IBM helped Etihad Airways create customer journeys by leveraging IBM Enterprise Design Thinking™ processes to improve customer experience.
- It has leveraged its proprietary solutions to create business impact for its clients. For instance, it used the IBM Cloud Pak® for Integration solution to integrate multiple department systems for Tatweer Building Company. Similarly, it automated the manual financial data collection process for Emirates National Oil Company by leveraging the IBM Cognos Controller solution.
- It helped Majid Al Futtaim, a leading shopping mall and retail group, become future-ready by providing end-to-end food traceability and visibility using the blockchain-based IBM Food Trust. This enabled the client to offer its customers enhanced nutritional value and food quality.

Investments and innovation



- It is aligned with the GCC region's vision and has invested heavily in developing local talent. In June 2022, it collaborated with King Saud University, Saudi Arabia, to bridge the AI skill gap by launching upskilling initiatives and supporting Saudi Vision 2030. Similarly, it has an IBM Digital - Nation program in partnership with the Saudi Ports Authority to improve the IT skills of Saudi Port employees. Furthermore, it has collaborated with the Saudi Federation for Cybersecurity, Programming, and Drones to improve the private sector and government employees' AI/ML skills.
- It has invested in setting up a client engineering team in the Middle East and Africa to improve citizen services, address regulatory issues, enhance digital platforms for fintech operations, and detect frauds on telecom networks.

Ecosystem development



- In November 2021, it partnered with AWS to codevelop an OSDU™ Data Solution that leverages AWS Cloud, IBM Open Data for Industries, and IBM Cloud Pak for Data to support oil and gas companies in streamlining operations with new energy sources. In March 2022, it partnered with the UAE's Ministry of Industry and Advanced Technology to speed up digital transformation in the UAE in alignment with the region's Industry 4.0 initiative. In September 2022, it partnered with the Saudi Ministry of Energy and the Saudi Data and Artificial Intelligence Authority to detect and reduce carbon emissions across the Kingdom of Saudi Arabia.
- It has partnered with academia, such as King Saud University and the Mohamed bin Zayed University of Artificial Intelligence, to conduct AI research.

Infosys: RadarView profile



Practice overview

- Practice size: 400+
- Active clients: 50+
- Delivery highlights: Has been delivering digital services in GCC for over 15 years

\$100M-\$250M
Digital services revenue in GCC, June 2022

10%-20%
Digital revenue growth in GCC, June 2022

Key digital solutions

| | |
|-------------------------|---|
| Finacle Treasury | A solution to speed up the treasury transformation process for banks and asset management firms |
| Infosys Genome Solution | An analytics solution that leverages customer data to improve customer experience |
| Infosys AssistEdge | A cross-channel solution for contact centers to improve customer experience |
| Infosys Cyber Next | A cybersecurity/automation solution to provide a security-as-a-service platform |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Improves patient experience by automating overseas patient processes. Leverages blockchain for trade finance and international remittances.

Sample clients

- BankDhofar
- Al Ahli Bank of Kuwait
- Emirates NBD
- A government organization in Abu Dhabi
- A bank in the Middle East
- Zain Bahrain
- A bank in EMEA
- RAKBANK
- Sharjah Islamic Bank
- Emirates Islamic
- A financial services company in EMEA

Partnerships/alliances



| | |
|--------------|--|
| | <p>Partnered to handle financial crimes using AML and regulatory compliance capabilities</p> <p>Implemented Oracle HCM Cloud to transform performance management</p> <p>Partnered to use its wealth mgmt. solutions in managed services, SaaS, and BPaaS models in EMEA</p> <p>Collaborated to leverage AWS for managed services on the cloud for EMEA customers</p> |
|--------------|--|

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

Case studies

| Client | Capability | Summary | Business impact |
|---|--|--|--|
| A bank in EMEA | <ul style="list-style-type: none"> • Cloud | <ul style="list-style-type: none"> • The bank faced challenges in meeting regulatory deadlines, creating an anti-money laundering solution, and reducing fraudulent transactions. It also wanted to modernize its legacy system and migrate to the cloud. • Infosys implemented the end-to-end managed services-based Actimize AML solution on Microsoft Azure Cloud to screen customer watchlists, monitor transactions, and conduct customer due diligence while maintaining regulatory compliance. | <ul style="list-style-type: none"> • Reduced total cost of ownership by approximately 30% • Reduced alert handling time by 20% |
|  | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The bank wanted to improve its remittance business by providing a seamless customer experience through a mobile application. • Infosys improved customer onboarding experience by launching the RMT app, which enabled registration, eKYC, scanning of Emirates ID, detail sharing with the bank to create a login ID, and ID proofing through facial recognition to access account details. | <ul style="list-style-type: none"> • Reached out to 4.5M expatriates through the RMT app • Enabled opening of account in less than three minutes • Ensured 1M annual transactions through the RMT app |
|  | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The bank wanted to automate its day-to-day operations to improve turnaround time and customer satisfaction. • Infosys automated the process by leveraging Infosys AssistEdge solution with robotic process automation bots to perform maker and checker processes in Finacle Treasury, eliminating errors and inconsistencies. | <ul style="list-style-type: none"> • Reduced turnaround time by 97% • Reduced manual effort by 92% • Reduced salary credit turnaround time from 48 hours to six minutes |
| A government organization in Abu Dhabi | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The agency had customer information on multiple systems, and it needed an integrated system to retrieve all the information. It also wanted to reduce manual effort and improve operational efficiency. • Infosys designed a unified WebCenter Portal system by integrating identity access management, virus scanning, annotation systems, and business process management systems. It also implemented SLAs for system process steps and migrated the systems of 19 agencies to the new system. | <ul style="list-style-type: none"> • Improved end-user satisfaction • Reduced operational costs • Automated systems and implemented single sign-on |

Analyst insights

Practice maturity



- With over 15 years of experience in the Middle East, Infosys offers IT services such as advisory and consulting, testing, UX design, BPM and operations, solution implementation, system integration, application development and maintenance, and customer experience. It has helped banking and financial services, government, telecommunications, and retail sector customers across Bahrain, Qatar, Oman, Kuwait, the UAE, and Saudi Arabia.
- It attracts major business from the region's financial services, retail, and government sector customers by leveraging emerging technologies such as blockchain, automation, cloud, AI, advanced analytics, and cybersecurity. For instance, it helped Dubai Health Authority improve patient experience by automating overseas patient processes.
- It launched a pilot for a blockchain network with Emirates NBD, UAE, and ICICI Bank, India, to conduct transactions for trade finance and remittance business by leveraging the EdgeVerve Blockchain Framework. It also collaborated with Gulf International Bank, Bahrain, to conduct a blockchain-based trade finance network trial of Finacle Trade Connect, which leveraged R3's Corda platform.

Investments and innovation



- It has recently opened an office in Dammam, Saudi Arabia, to grow its business and acquire more clients in the country and another office in Abu Dhabi, UAE, through which it has acquired new government sector clients in Abu Dhabi. It has plans to develop a delivery center in Saudi Arabia to offer regional clients offshore, regional, and client office support.
- It focuses on developing regional talent through initiatives such as training and developing local talent and offering certifications, increasing local hiring, and including upskilling as a key performance indicator in employee performance.
- It has established Cyber Defense Centers and innovation hubs across EMEA, APAC, and the Americas to leverage cybersecurity for innovation.

Ecosystem development



- It has established a vast partner ecosystem with partners such as Microsoft Azure, AWS, and Cloud4C for cloud migration journeys and Adobe, IBM, Oracle, Red Hat, Docker, Microsoft, SAS, Tableau, and Newgen for leveraging technology to help regional customers drive operational efficiency.
- It collaborates with Finastra and Murex for digital banking solutions and with fintech firms such as GIEOM and Personetics to help financial services customers with compliance and data-driven financial solutions.
- It has partnered with NICE Actimize to defend customers in the Middle East against financial crimes by leveraging anti-money laundering (AML) solutions and regulatory compliance capabilities.

Injazat: RadarView profile



Practice overview

- Practice size: 1,000+
- Active clients: 50+
- Delivery highlights: Has been delivering digital services in GCC for over 15 years

3

Number of centers in GCC

>5%

Of annual revenue spent on R&D*

Key digital solutions

| | |
|---------------------------------------|---|
| Malaffi | A health information exchange platform to create a single patient record for all healthcare providers |
| Hassantuk | A fire and life safety alarm system that uses AI to monitor properties |
| Intelligent Cloud Management Platform | A platform to reduce costs and provide access to public and private cloud |
| Remote Healthcare | A mobile application to manage appointments and provide remote consultations to citizens |

Regional coverage

| |
|-----------------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Develops smart city and digital health solutions for organizations. Collaborates with academia to mentor and coach students.

Sample clients

- A UAE-based federal government entity
- Ministry of Interior, UAE
- Department of Health - Abu Dhabi
- EasyLease
- An Abu Dhabi-based government agency

Partnerships/alliances

| | |
|--|--|
| | Collaborated to detect and respond to cyberattacks in the UAE faster |
| | Partnered to mentor students in developing edtech solutions to improve the learning experience |
| | Collaborated with HCT for joint research projects, mentorship, and internship programs |
| | Collaborated to build Cyber Fusion Centers in Kuwait and Bahrain to counter cyber threats |




Industry coverage

| |
|---------------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

*Note: R&D implies research and development

Case studies

| Client | Capability | Summary | Business impact |
|---|--|--|---|
|  | <ul style="list-style-type: none"> AI Internet of things (IoT) | <ul style="list-style-type: none"> EasyLease wanted to manage its fleet of over 25,000 motorbikes by leveraging a digital solution. Injazat developed an Automated Fleet Management and Intelligent Transportation system for leasing and booking motorbikes. It leveraged AI and IoT to help EasyLease customers track and monitor vehicles they have leased out. It also leveraged real-time tracking data to ensure the safety and quality of the fleet. | <ul style="list-style-type: none"> Increased revenue for drivers and fleet owners Improved customer experience Reduced delivery delays Reduced asset management costs |
| <p>An Abu Dhabi-based government agency</p> | <ul style="list-style-type: none"> AI Augmented reality | <ul style="list-style-type: none"> The agency wanted a digital solution to provide game schedules and information, publish game results, and guide staff and athletes throughout the Special Olympics World Games in Abu Dhabi. Injazat designed a mobile app to notify visitors of game schedules and results in real time and provide shuttle bus timings. The app also answered visitors' queries through a chatbot and guided visitors, athletes, and staff. | <ul style="list-style-type: none"> Provided real-time support to over 7,000 athletes and 10,000 visitors who downloaded the mobile app Improved visitor experience |
|  | <ul style="list-style-type: none"> AI | <ul style="list-style-type: none"> The Department of Health - Abu Dhabi wanted a digital solution to control COVID-19 by providing its citizens with medical information, guidelines, and diagnostic services. Injazat designed the Remote Healthcare app, which leveraged AI to book appointments, examine COVID-19 symptoms, diagnose non-emergency cases, and provide remote consultations to its citizens. | <ul style="list-style-type: none"> Enabled doctors to communicate remotely with patients Allowed citizens to book and manage appointments |
|  | <ul style="list-style-type: none"> AI | <ul style="list-style-type: none"> The ministry wanted to implement a digital solution across the country to protect lives and properties. Injazat entered into a public-private partnership with the Ministry of Interior, UAE, and the UAE Civil Defense to design a fire alarm system called Hassantuk, which uses AI to monitor fire alarm systems of connected properties 24x7 from a control center. It sends real-time updates to civil defense operators and emergency services. | <ul style="list-style-type: none"> Improved public safety Reduced emergency services response time Reduced fire damages Lowered building insurance premiums |

Analyst insights

Practice maturity



- Since starting its operations in the UAE in 2005, Injazat has been offering digital services such as advisory and consulting, system integration, solution implementation, application development and maintenance, and customer experience to help government, energy and utilities, healthcare, and real estate customers in the region.
- It focuses on developing digital health and smart city solutions by leveraging cloud, cybersecurity, intelligent automation, AI, and advanced analytics technologies. For instance, it designed a smart fire and life safety solution called Hassantuk for the UAE Ministry of Interior and the UAE Civil Defense to reduce response time and increase public safety.
- It designed a smart fleet management solution for EasyLease to automate the leasing and booking process of over 25,000 motorbikes.
- It is working on future technologies, such as metaverse, by exploring how metaverse can be leveraged to create business impact for organizations in the Middle East.

Investments and innovation



- In October 2022, it formed a joint venture called Nesma Injazat with Nesma Infrastructure and Technology, a Saudi Arabian solutions provider, to provide digital services to government, healthcare, real estate, and energy sector customers in Saudi Arabia through offices in Riyadh and Jeddah.
- In June 2020, it launched the GCC region's first Cyber Fusion Center to provide data breach and cyberattack protection to regional customers.
- It focuses on contributing to zero carbon emissions. It has joined the One Billion Tree-Planting Initiative with EcoMatcher to grow trees in the UAE with the help of a blockchain-enabled digital planting platform and let tree owners track the growth of trees on a mobile application.
- It invests in developing local talent by collaborating with Zayed University and Higher Colleges of Technology to mentor and coach students.

Ecosystem development



- In June 2022, it partnered with the UAE Cyber Security Council to improve response time to detect and prevent cyberattacks for government and semi-government organizations in the UAE.
- It partners with startups through its InGenius innovation lab to innovate solutions for clients. For instance, it partnered with Born2Global, a South Korean startup hub, to design innovative solutions for partners in the UAE. It also partnered with Hub71, Abu Dhabi's tech startup ecosystem, to speed up the adoption of digital technologies in organizations and support the development of regional startups.
- It collaborates with technology providers such as GBM, StarLink, and Kalaam Telecom to augment its cloud and cybersecurity capabilities.

Intertec Systems: RadarView profile



Practice overview

- Practice size: 380+
- Active clients: 550+
- Delivery highlights: Delivered over 100 projects

5
Number of centers in GCC

>\$10M
Engagements delivered

Key digital solutions

| | |
|------------------------------------|---|
| SCOMPLY | A regulations management suite to streamline and automate regulatory processes |
| HOSTnet | A hospitality management software suite to handle reservations and customer queries |
| Accounts Payable Automation system | A touchless solution using automation to streamline accounts payable processes |
| Smart Attendance | An IoT solution to automate attendance using facial recognition and digital iCards |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★
- Ecosystem development ★★★★★

Leverages in-house digital solutions to reduce security risks. Serves GCC customers with 50+ technology alliances.

Sample clients

- Al Khater Group
- A UAE-based government body
- Aldar Academies
- A Bahrain-based telecom company
- A Dubai-based government agency
- A UAE-based government-owned travel agency
- The Health Authority - Abu Dhabi

Partnerships/alliances

| | |
|---------------------------------------|--|
| Centriqe Process Data Insights | Improves customer engagement for GCC customers using AI and intelligent automation solutions |
| FireCompass | Provides cybersecurity services using FireCompass' Continuous Automated Red Teaming capability |
| ivanti | Assists GCC organizations using Ivanti Service Desk software |
| infor | Automates asset management operations using Infor's Enterprise Asset Management solution |

Industry coverage


| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

Intertec Systems: RadarView profile



Case studies

| Client | Capability | Summary | Business impact |
|---|--|---|--|
| <p>A Bahrain-based telecom company</p> | <ul style="list-style-type: none"> Intelligent automation | <ul style="list-style-type: none"> The telecom company wanted to increase customer satisfaction by adopting best practices and tracking service levels against set targets. Intertec Systems supported the telecom company by deploying Ivanti Service Desk software for the incident, change, service level, and project management. It also provided drag-and-drop functionality with its Process Designer and Window Designer modules to enable client configuration. | <ul style="list-style-type: none"> Automated project management processes Improved turnaround time for service requests Improved customer experience |
|  <p>ALDAR ACADEMIES SHAPING OUR FUTURE</p> | <ul style="list-style-type: none"> Cloud | <ul style="list-style-type: none"> Aldar Academies required on-premises Microsoft Exchange services. They wanted to provide Office 365 services to its students and staff by consolidating multiple school web domains into one, thereby reducing interaction with multiple IT teams. Intertec Systems deployed a hybrid Office 365 architecture for Aldar and integrated Office 2007 with Office 365 cloud. It migrated 200 mailboxes from the different schools and institutions under Aldar. | <ul style="list-style-type: none"> Achieved operating model with resilient infrastructure Created a hybrid cloud emailing solution instead of a fully on-premises one |
| <p>A UAE-based government body</p> | <ul style="list-style-type: none"> Cybersecurity Network | <ul style="list-style-type: none"> The government wanted Intertec Systems to design and implement a security and network infrastructure to launch the Oracle HRMS service. Intertec Systems took a consultative approach where its engineers assessed the existing network infrastructure and recommended a secure and reliable network. It also carried out user acceptance testing after implementation to increase customer satisfaction. | <ul style="list-style-type: none"> Security and network management based on the service level agreement Provided a secure, scalable, and reliable platform for IT requirements of the client |
| <p>A UAE-based government-owned travel agency</p> | <ul style="list-style-type: none"> Cybersecurity Network | <ul style="list-style-type: none"> The agency ran its network application on obsolete systems, leading to security vulnerabilities. It wanted Intertec Systems to design, install, and support a firewalled network that was secure and reliable. Intertec Systems designed firewalls for the agency, rolled them out into production, and improved the performance of its cybersecurity posture. It also designed a Wi-Fi network by leveraging the new firewalls and saved costs in Wi-Fi management. | <ul style="list-style-type: none"> Improved user experience and network performance Eliminated possible downtime Reduced total cost of ownership Reduced security risks |

Analyst insights

Practice maturity



- Intertec Systems has over 30 years of experience serving GCC customers. It has provided digital technology solutions to regional government agencies and healthcare and financial sector organizations by leveraging its cloud, automation, managed services, network, and cybersecurity offerings.
- It offers technology services, such as advisory and consulting, testing, solution implementation, system integration, and application maintenance and development, to create value for its clients by improving their operational efficiencies and reducing costs.
- It utilizes its in-house IoT, cloud, network, and security-related digital solutions to help airline and construction organizations mitigate their security risks, improve network performance, and save operational costs.
- It leverages its partner solutions, such as the Ivanti Service Desk software, Infor Enterprise Asset Management (EAM) software, Ivanti Xtraction, and Fortigate Next Generation Firewall, to support GCC customers. For instance, it helped the Abu Dhabi Farmers' Services Centre by deploying Infor EAM to manage assets across locations and applying radio frequency identification (RFID) tags to track assets.

Investments and innovation



- It invests in building partnerships with technology providers in the GCC region to augment its cybersecurity, AI, and process automation capabilities. It has over 50 alliances with technology providers to improve customer service.
- It has invested in acquiring intellectual property rights (IPRs) and has nine active IPRs. It invests in research and development activities and certifications to provide better services to customers.
- It has invested in setting up network operation centers in Dubai, UAE. It also focuses on software development centers, managed services, and centers of excellence for emerging technologies such as AI, cloud, automation, network, and cybersecurity.

Ecosystem development



- It has built many partnerships with technology solution providers such as Cisco, Ivanti, Hewlett Packard Enterprise, FireCompass, Centriq, Microsoft Dynamics, Tata Communications, Palo Alto Networks®, and FacilityConneX. For instance, it partnered with Tata Communications to provide security and cloud solutions for customers in the UAE.
- It partnered with Fortinet to implement a Fortigate Next Generation Firewall solution to improve the security network for a UAE-based retail chain.

ITC Infotech: RadarView profile



Practice overview

- Practice size: 90+
- Active clients: 15+
- Delivery highlights: Delivering digital services in GCC for over ten years

| | |
|----------------------------|--------------------------|
| ~10% | \$25M-\$50M |
| Revenue from GCC, Mar 2022 | Revenue in GCC, Mar 2022 |

Key digital solutions

| | |
|--------------------------------|---|
| Smart Loyalty | An AI/ML solution to increase customer loyalty by predicting offers |
| Smart Chatbots | An AI solution to improve guest experience, from booking to the check-out process |
| Case/Claim Handling Automation | An NLP solution to automate the passenger claims process to reduce their turnaround time |
| Smart Inbox | An AI order-creation solution that extracts relevant data for customer orders from emails |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★

Sample clients

- A Middle East development bank
- A Saudi Arabian ministry
- A Middle East retailer
- A Saudi Arabian bank
- A real estate division of a UAE-based group
- A Middle Eastern insurance company
- A Middle Eastern bank
- A Middle Eastern airline

Partnerships/alliances

| | |
|--|---|
| | Implements SAP HANA Enterprise Cloud for a Saudi Arabian seller and manufacturer |
| | Automates banking processes by leveraging UiPath's RPA capabilities |
| | Leverages Cloudera to implement enterprise data lakes for analytical reporting |
| | Integrates financial planning models for effective forecasting using Anaplan's capabilities |

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial Services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Collaborates with the Saudi government to improve citizen services. Leverages its innovation lab to develop AR/VR solutions.

Darker color indicates higher industry concentration: ●●●●●

Case studies

| Client | Capability | Summary | Business impact |
|---|--|--|--|
| A Saudi Arabian bank | <ul style="list-style-type: none"> Intelligent automation | <ul style="list-style-type: none"> The bank faced issues with automated teller machine (ATM) claim processes, leading to a market-share loss. It wanted to automate the claim request process to reduce the claim cycle time. ITC Infotech automated the ATM claim process by leveraging robotic process automation (RPA) for retrieving data from emails. It implemented optical character recognition with RPA to extract data from images to improve the ATM helpdesk process. It optimized the debt approval process by using bots to read emails and the HR onboarding process by using bots to maintain a database of processed records. | <ul style="list-style-type: none"> Reduced job execution time from 15 minutes to two minutes Improved the loan application processing speed by 300 times Reduced manual effort by 90% |
| A Middle Eastern airline | <ul style="list-style-type: none"> Analytics | <ul style="list-style-type: none"> The airline wanted to modernize its legacy data warehouse systems with modern data architecture to handle large volumes of data and create end-user reports. ITC Infotech leveraged Cloudera to implement an enterprise data lake for data and analytics requirements of the systems. It used a big data platform for raw data and a data warehouse for analysis and reporting for the end users. | <ul style="list-style-type: none"> Reduced total cost of ownership by 20% Improved end-user reporting performance by 70% Reduced time to market by 20% |
| A real estate division of a UAE-based group | <ul style="list-style-type: none"> Intelligent automation | <ul style="list-style-type: none"> The real estate division of a UAE-based group wanted to remove manual processes to enhance financial planning and cross-functional visibility. ITC Infotech integrated manpower planning, accounting, and financial planning processes to bring real-time visibility. It automated reports to slice and dice data to help users forecast and plan effectively. | <ul style="list-style-type: none"> Reduced turnaround plan time by 40% Improved team productivity budgeting by 40% Eliminated manual efforts in the data preparation process |
| A Middle Eastern bank | <ul style="list-style-type: none"> Intelligent automation | <ul style="list-style-type: none"> The bank wanted to automate its core financial processes and create a model to resolve production incidents using SLAs. ITC Infotech assessed financial key performance indicator (KPI) mapping and leveraged BluePrism's RPA capability for the development framework to automate financial processes. | <ul style="list-style-type: none"> Covered 3,000 requests per day Increased result accuracy to 100% using standard frameworks Reduced rule-based tasks dependency |

Analyst insights

Practice maturity



- Since starting its operations in 2012 in Saudi Arabia, ITC Infotech has grown and expanded its GCC operations to the UAE, Qatar, and Bahrain. The Middle East region contributes 10% of the company's gross global revenue.
- The majority of its revenue in the GCC region is derived from banking and financial services clients, followed by the public sector, high-tech, travel and transportation, and telecom sector clients. It has recently started working with a Saudi Arabian ministry to improve citizen services.
- It provides enterprise services across consulting, system integration, application development and maintenance, testing, product life cycle management, enterprise resource planning, and digital product services by leveraging analytics and intelligent automation.
- It helped a Middle East-based retailer and hospitality group design a customer engagement and loyalty program by leveraging consulting and benchmarking approaches to improve its loyal customer base by 20%. Similarly, it implemented a Dynamics CRM solution for a Middle Eastern insurance company to improve customer satisfaction by 30%.

Investments and innovation



- It leverages its Innovation Lab to assess, develop, and test the viability of innovative solutions using emerging technologies such as intelligent automation, advanced analytics, AR/VR, and drones. It also develops proofs of concept to assess the business relevance of a solution by using BrainWave, its innovation management platform.
- It has set up centers of excellence in training, RPA, analytics, and treasury with the Saudi Arabian bank to support its digital transformation journey over 10 years of partnership. It also empowers its GCC clients to meet their Saudi Vision 2030 commitment.

Ecosystem development



- It has partnered with cloud service providers, such as Microsoft, Google, and AWS, to help regional customers migrate their legacy applications to the cloud.
- It has partnered with automation solution providers, such as Pega and UiPath, to leverage their capabilities in automating clients' business processes, thereby increasing accuracy and reducing manual efforts and turnaround time. For instance, it leverages UiPath's automation capabilities to automate banking processes for a bank in the Middle East.
- It has partnered with SessionM, a customer loyalty platform provider, to increase customer loyalty, engagement, and sales for its GCC customers.

LTIMindtree: RadarView profile



Practice overview

- Practice size: 1,800+
- Active clients: 100+
- Delivery highlights: Delivery centers in Riyadh, Al `Adamah, and Abu Dhabi

| | |
|--|-------------------------------|
| ~\$125M Revenue from rest of world*, Mar 2022 | 8 Number of centers in GCC |
|--|-------------------------------|

Key digital solutions

| | |
|---------------------------------------|---|
| AML Solution Suite | An analytics/automation platform to improve transaction monitoring and case management |
| Gladius Connected Buildings | An IoT platform to create a unified system by integrating OT, IT, and IoT systems in and across buildings |
| Shotclasses | A solution to improve productivity by making estimates across manufacturing operations |
| Program Management Information System | A centralized tool to manage costs, people, and process parameters across projects |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Has developed a metaverse-based POC for an airline to train its crew members. Collaborates with academia for local talent development.

Sample clients

- A Middle East-based joint venture refinery
- A bank in the Middle East
- A UAE-based real estate company
- A university in Saudi Arabia
- Power International Holding (PIH)
- A global utility company
- A smart city in the Middle East
- QatarEnergy
- Dubai Customs

Partnerships/alliances

| | |
|---------|---|
| Injazat | Partnered to use its best-shore service delivery model to help customers with their cloud journey |
| SAP | Partnered to use SAP Integration Suite to improve employee and customer experience |
| ORACLE | Teamed up to leverage Oracle Application Development Framework to create applications |
| PEGA | Collaborated to improve customer experience by using Pega's RPA and BPM capabilities |


Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

*Note: Rest of world implies regions such as the Middle East, Africa, and Australia

Case studies

| Client | Capability | Summary | Business impact |
|---|---|--|---|
|  POWER INTERNATIONAL - HOLDING - | <ul style="list-style-type: none"> • Analytics • Cloud • Intelligent automation | <ul style="list-style-type: none"> • The company wanted to standardize governance, management control, master data, and automate and integrate disparate ERP systems to get decision-making insights. • LTIMindtree leveraged a cloud-based SAP S/4HANA solution suite for insights-based operational transactions reporting and deployed over 30 SAP Analytics Cloud stories for HCM, business, project management, and controlling reporting. It utilized the SAP Integration Suite for integrating multiple systems to improve customer experience. | <ul style="list-style-type: none"> • Improved payroll cycle times by 60% • Improved accuracy in progress and performance reporting • Saved costs in strategic e-sourcing • Improved decision-making |
| A UAE-based real estate company | <ul style="list-style-type: none"> • Analytics • Intelligent automation • Internet of things (IoT) | <ul style="list-style-type: none"> • The company wanted to move from a management- or incident-based firefighting to a smart building management system. • LTIMindtree assessed the existing building system and implemented the Gladius Connected Building solution to integrate its OT, IT, and IoT systems. It leveraged video-/IoT-based analytics to improve customer safety and comfort. It automated service ticket generation through email or mobile applications to improve operational efficiency. | <ul style="list-style-type: none"> • Increased energy efficiency by 18% month-on-month • Improved asset management using automated service ticket generation • Improved asset life |
| A Middle East-based joint venture refinery | <ul style="list-style-type: none"> • AI • AR/VR • IoT | <ul style="list-style-type: none"> • The refinery wanted zero incidents and unplanned downtime while maximizing its refining margins. • LTIMindtree conducted a digital maturity assessment across the business, process, applications, integration, business value realization architecture, data governance, and user adoption to design a foundation for cloud, AR/VR, AI/ML, mobility, IoT, and big data analytics. | <ul style="list-style-type: none"> • Reduced annual maintenance costs by over \$2M • Increased gross refining margins by 10 cents/barrel • Increased plant reliability by 0.5% |
| A university in KSA | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The university wanted to integrate backend systems and ERP to provide accessibility to 11 e-services via a single portal to students and staff. • LTIMindtree deployed the Oracle Fusion Middleware on Enterprise Service Bus (ESB), designed 11 e-services applications on the Oracle ADF portal, and integrated ERP and backend systems with the ESB platform. | <ul style="list-style-type: none"> • Reduced time for daily tasks by 70% • Consolidated data through applications on ESB |

Analyst insights

Practice maturity



- LTIMindtree focuses on customers in the Middle East, in line with Saudi Vision 2030, across banking and financial services, insurance, retail, utilities and resources, manufacturing, real estate, travel, telecom, healthcare, and the public sector through its offices in Saudi Arabia and the UAE.
- It offers advisory and consulting, POC development, application development and maintenance, solution implementation, and customer experience services. For instance, it offered digital consulting for application portfolio rationalization and created an AI chatbot to provide user support for a petrochemical company in Saudi Arabia.
- It leverages emerging technologies such as blockchain, cybersecurity, intelligent automation, advanced analytics, IoT, and AI to reduce IT expenses and optimize operations. For instance, it designed an automated governance, risk, and compliance solution for a smart city in the GCC region. Similarly, it helped a regional healthcare provider to strengthen its security posture to support the cybersecurity and network operations center.
- It established offshore development centers across India during the pandemic to ensure business continuity for GCC clients.

Investments and innovation



- It created a metaverse-based POC for a regional airline company to train its crew members. It also leveraged Digital Pumpkin, its innovation lab, to design a Digital Partner Portal to improve sales and agent experience for a property and casualty insurer in Saudi Arabia.
- It is driving talent development in the region by collaborating with educational institutions, such as the National Institute of Technology, Princess Nourah bint Abdulrahman University, and King Saud University, in Saudi Arabia. It also collaborates with the Human Resources Development Fund, a government agency in Saudi Arabia, to develop local talent.
- It focuses on Saudi Vision 2030 by working with government agencies on regional initiatives such as NEOM to drive regional innovation.

Ecosystem development



- In December 2020, it partnered with Injazat, a regional digital transformation, cloud, and cybersecurity solutions provider, to speed up transformation in the region by leveraging Injazat's best-shore service delivery model to help GCC customers with cloud journeys.
- It has partnered with Temenos, a software provider for the banking and financial services sector, to provide application support and innovative solutions in wealth management, corporate, and retail management.
- It has partnered with providers such as SAP, Oracle, Snowflake, Pega, and IBM in the Middle East to help local customers. For instance, it implemented 12 business process modules in SAP ERP Central Component to optimize operations for a petrochemical manufacturer in Saudi Arabia.



Practice overview

- Practice size: 2,300+
- Active clients: 175+
- Delivery highlights: Delivered over 200 engagements

| | |
|--|--|
| \$460M Revenue from Middle East and Africa, Mar 2022 | 16% Revenue growth in Middle East and Africa, Mar 2022 |
|--|--|

Key digital solutions

| | |
|-------------------------------------|--|
| TCS BaNCS for Property and Casualty | A complete insurance suite to improve operational efficiency and speed-to-market |
| TCS BaNCS for Market Infrastructure | A solution that supports trade and post-trade functions and offers trade matching |
| TCS BaNCS for Treasury | An IA/blockchain consolidated platform for treasury management |
| Quartz™ | A blockchain solution to help banks provide cryptocurrency trading services to their clients |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Provides consulting services for metaverse solutions. Has an all-women innovation lab to collaborate with startups and universities.

Sample clients

- Shelf Drilling
- Commercial Bank of Kuwait
- Bahrain's Labour Market Regulatory Authority (LMRA)
- Kuwait Clearing Company
- Emirates NBD
- dU Telecom
- Banque Saudi Fransi
- Takaful International
- Abu Dhabi Islamic Bank
- Dubai Holding
- Emaar Group
- Muntajat

Partnerships/alliances





| | |
|--|---|
| | Collaborates for goIT program to inspire students to pursue STEM and technology careers |
| | Promotes policy-making and innovation among Emirati students |
| | Migrates mainframe applications to AWS Cloud for GCC customers |
| | Offers as-a-service solutions to streamline business processes by leveraging Oracle Cloud |

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

Case studies

| Client | Capability | Summary | Business impact |
|---|---|---|---|
|  | <ul style="list-style-type: none"> • Cloud • Intelligent automation | <ul style="list-style-type: none"> • Bahrain's Labour Market Regulatory Authority wanted to replace its legacy IBM mainframe application for operational efficiency. • TCS conducted a pre-assessment of the IBM application, validated the migration strategy, created POCs, and recommended multiphase cloud migration to the AWS platform to maintain a high level of security. It leveraged native services, such as Amazon S3 and Elastic Compute Cloud (EC2), and automated backup management. | <ul style="list-style-type: none"> • Reduced operational expenses by 50% • Improved application response time by seven times • Improved system agility by 95% |
|  | <ul style="list-style-type: none"> • Analytics • Intelligent automation | <ul style="list-style-type: none"> • Takaful International wanted to transform its legacy IT systems for ease of access and to ensure that its customer-facing documents were in Arabic. • TCS designed a customized solution leveraging its BaNCS solution to migrate claims and policy data. The solution allowed the introduction of new products to get intended growth and provided end-to-end support for sales, claims, and policy administration systems. | <ul style="list-style-type: none"> • Increased customer growth by 50% • Eliminated manual errors to improve operational efficiency • Reduced time to market for new products |
|  | <ul style="list-style-type: none"> • Analytics • Intelligent automation | <ul style="list-style-type: none"> • The Kuwait Clearing Company wanted to replace its in-house legacy systems to minimize the impact on remat and demat transactions, reduce IT maintenance costs, and improve operational efficiency. • TCS customized and implemented TCS BaNCS for Market Infrastructure to meet the local regulations of Kuwait. It provided registrar and depository services on a single platform and automated the fund transfer and payment process using the SWIFT network. | <ul style="list-style-type: none"> • Reduced operational overhead costs • Released new features such as analytics and mobile app • Increased data reliability and security by minimizing manual errors |
|  | <ul style="list-style-type: none"> • Intelligent automation • Network | <ul style="list-style-type: none"> • dU Telecom wanted to reduce operational costs and delays in network handling and improve the service quality and customer experience. • TCS leveraged its Field Service Automation solution that used Microsoft Dynamics 365 platform to migrate from the legacy to a new system. It helped the operations team to plan and execute their tasks and capture customer feedback during the field visit. | <ul style="list-style-type: none"> • Received 98% positive customer feedback • Improved work efficiency by 50% • Reduced warehouse visits by 5%-10% |

Analyst insights

Practice maturity



- With over 30 years of experience in the GCC region, TCS has been helping customers with end-to-end IT services such as consulting, proof of concept development, application development and maintenance, system integration, testing, and package implementation. It is focusing on diversification and bringing all its services to the region.
- It solves business challenges for GCC customers across the public sector, banking, and telecom using digital solutions that leverage emerging technologies such as the metaverse, cybersecurity, IoT, blockchain, cloud, intelligent automation, AI, and advanced analytics.
- It creates value for its customers in the GCC region by applying innovative technologies. For instance, it leveraged blockchain solutions to streamline supply chain management; provided consulting services to a UAE-based government agency on the metaverse; integrated IoT, analytics, and existing systems for a digital farming client; and implemented a payments solution for a Saudi Arabia-based central bank.
- It has helped a Kuwait-based commercial bank improve its regulatory compliance and customer experience using TCS BaNCS for the Treasury solution.

Investments and innovation



- In December 2021, it set up an all-women innovation lab in Riyadh, Saudi Arabia, to collaborate with universities and startups and offer students a platform to innovate new solutions using emerging technologies. This innovation lab aligns with TCS' focus on Saudi Vision 2030 and promotes the skill development of employees and students in the region.
- It focuses on sustainability practices and standards across innovation, ethics, health and safety, diversity, and reduced carbon emissions.
- In December 2020, it conducted its first hackathon in the region to design Arabic conversational solutions that leverage Votek, an automatic speech recognition system, and TCS Knadia, a TCS chatbot.

Ecosystem development



- It has built partnerships with technologies providers, such as AWS, Pega, Microsoft, SAP, Oracle, IBM, Automation Anywhere, Google, and Adobe, to improve business processes and customer experience for the GCC customers. For instance, it helped a Middle East-based telecom client to increase customer satisfaction and reduce operational costs by leveraging the Microsoft Dynamics 365 platform.
- In 2022, it partnered with academia for its goIT innovation and career readiness program in the UAE and Saudi Arabia, such as Mohammed Bin Rashid School of Government, Dubai, to promote innovation amongst Emirati students. It also has partnerships with JSS International School, Dubai, and Al Sahafa International School, Riyadh, to motivate young students to pursue science, technology, engineering, and mathematics (STEM) careers.

Tech Mahindra: RadarView profile



Practice overview

- Practice size: 2,000+
- Active clients: 150+
- Delivery highlights: Delivering digital services in GCC for over 25 years

| | |
|--|---|
| \$250M-\$500M Digital services revenue in GCC, Jun 2022 | ~35% Digital revenue growth in GCC, Jun 2022 |
|--|---|

Key digital solutions

| | |
|---------------------------------------|---|
| TechM PortNxT solution | An ecosystem solution for port workers and machines to optimize operations |
| Catering xPress™ | A solution to manage the end-to-end catering services for airlines |
| Medzy | An AI chatbot to enable coordination between patients and physicians in the UAE to improve patient experience |
| Blockchain solution for land registry | A smart contract solution for secure data sharing between citizens and organizations |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Provides transparency in data sharing using blockchain solutions. Serves GCC customers with 60+ technology alliances.

Sample clients

- An Abu Dhabi-based government agency
- A Saudi Arabia-based real estate development company
- An oil-producing and refining company in Oman
- A UAE electricity and water utility
- A Middle East-based retail conglomerate
- A Middle East-based steel manufacturing company

Partnerships/alliances

| | |
|---|---|
| A business software solutions provider | Leverages Cloud Platform Integration technology to integrate legacy systems |
| A cloud service provider (CSP) | Implements cloud solutions to modernize legacy applications |
| An Information and Communications Technology (ICT) solutions provider | Has partnered with ICT solutions provider to offer enterprise 5G, smart city, and IoT solutions |
| A technology integrator | Leverages cloud solution to derive data insights for GCC customers |

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

Case studies

| Client | Capability | Summary | Business impact |
|---|---|---|--|
| A Middle East-based retail conglomerate | <ul style="list-style-type: none"> • Cloud • Intelligent automation | <ul style="list-style-type: none"> • The retail conglomerate wanted a unified talent management system and a framework to manage, attract, retain, and grow talent. • Tech Mahindra implemented an Oracle HCM cloud solution that leveraged the core human resource (HR), benefits, recruitment, leaves, payroll, and performance management processes used to recruit and manage talent. It automated repetitive tasks and migrated data from existing legacy systems to the cloud HCM platform. | <ul style="list-style-type: none"> • Reduced payroll processing time by 68% • Reduced compensation costs by 10% • Improved data security and privacy |
| An oil-producing and refining company in Oman | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The oil company had large volumes of logistics data to be processed and reported. It wanted an intelligent solution to automate its data collection, reconciliation, and reporting. • Tech Mahindra leveraged its intelligent automation technology to design robotic process automation bots that automated repetitive and rule-based tasks and improved accuracy by reducing human errors. | <ul style="list-style-type: none"> • Reduced operational expenditure by 20% • Saved \$1.6M by automating processes • Achieved scalability of 198,000 automation hours |
| A Middle East-based steel manufacturing company | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The manufacturing company wanted an integrated system for its HR processes to improve the employee experience. • Tech Mahindra leveraged automation to integrate legacy systems using SAP CPI technology and SAP SuccessFactors as part of the HR transformation strategy. It implemented new functionality, such as employee payroll and compensation, performance, and goal management, to replace manual processes. | <ul style="list-style-type: none"> • Improved operational performance by using automation • Enhanced employee experience by adding new functionality |
| An Abu Dhabi-based government agency | <ul style="list-style-type: none"> • Blockchain | <ul style="list-style-type: none"> • The government agency wanted a secure data-sharing system to reduce paperwork and increase transparency and visibility for land records. • Tech Mahindra designed a blockchain land registry solution that leverages smart contracts for paperless data sharing between citizens and government entities. It utilizes a dashboard that tracks the transfer of data between multiple entities. | <ul style="list-style-type: none"> • Improved citizen services using the dashboard • Brought transparency into the data-sharing process • Secured land records |

Analyst insights

Practice maturity



- With over 25 years of experience in the Middle East, Tech Mahindra has focused on telecommunications, banking and financial services, utilities and resources, and public sector offerings to serve its GCC customers. It is working on several smart city initiatives as a part of the Saudi Vision 2030.
- Its major revenue share is from the telecommunications vertical. This business is mainly driven by the UAE and Saudi Arabia markets, followed by Qatar, Oman, Bahrain, and Kuwait.
- It leverages emerging technologies, such as blockchain, network, cloud, IoT, automation, AI, and data analytics, to solve business challenges for customers in the GCC region. For instance, it implemented a blockchain-based land registry solution for an Abu Dhabi-based government agency to bring data-sharing transparency between multiple entities. It is currently working on several proofs of concept that leverage IoT and 5G technologies.
- It provides its customers with infrastructure and cloud services, such as migrating to the cloud and maintaining on-premises and hybrid clouds. It also offers business process services to its regional clients.

Investments and innovation



- In June 2022, it established an Innovation and Technology Development Center in Oman to offer solutions for oil and gas, telecom, banking and financial services, and the public sector by leveraging 5G, metaverse, cloud, AI, and data analytics. This aligns with its commitment to upskilling and reskilling Omani talent to support the Oman Vision 2040.
- It promotes local talent development and hires students and lateral employees by considering policies of Omanisation, Emiratisation, and Saudisation. It also relocates the Middle East talent for training and moves them back to the GCC region after completing workshops and training.
- It has launched Formula racing Ideation Laps in Riyadh, Saudi Arabia, to develop green digital solutions targeting sustainability and electric vehicles.

Ecosystem development



- It has built a strong partner ecosystem with over 60 partnerships in the GCC region. It has partnered with cloud service providers such as Microsoft, AWS, and Google to help regional customers with their cloud migration journeys.
- It has partnerships with infrastructure providers, such as Huawei and Cisco, to provide network operations and IT infrastructure services.
- It has also partnered with SAP, IBM, Oracle, Salesforce, ServiceNow, Cloudera, Micro Focus, Informatica, Datarobot, PTC, Pega, Adobe, and AppDynamics. For instance, it partnered with Oracle to leverage its Oracle HCM Cloud solution to help customers modernize their legacy HR processes. Similarly, it leveraged the SAP Cloud Platform Integration technology to integrate legacy systems for a Middle East-based manufacturing client.

Virtusa: RadarView profile



Practice overview

- Practice size: 550
- Active clients: 21+
- Delivery highlights: Delivers projects through regional offices in Qatar and UAE

| | |
|--|---|
| \$50M-\$100M Digital services revenue from GCC, June 2022 | 20%-30% Digital revenue growth in GCC, June 2022 |
|--|---|

Key digital solutions

| | |
|---------------------------|--|
| Digital Product Workbench | An integrated platform to reduce costs and speed up time to market through rapid product development |
| AI Model Zoo | An AI/ML marketplace tool to improve developer productivity using data models |
| Paper2App | An end-to-end solution to digitize and analyze paper documents |
| Open Innovation Platform | A platform to reduce the time-to-test and time-to-market for financial products |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★
- Ecosystem development ★★★

Improves customer experience using payment modernization. Has created a go-to-market blueprint for new solutions.

Sample clients

- Mashreq Bank
- Abu Dhabi Islamic Bank
- A Dubai-based bank
- Saudi British Bank
- An airline in Qatar
- A Middle Eastern airline
- Emirates NBD
- A Middle East-based bank

Partnerships/alliances


| | |
|------------------------------------|---|
| AUTOMATION ANYWHERE Go be great | Leverages Automation Anywhere capabilities to develop test bot solutions |
| | Improves anti-money laundering compliance using contextual data models provided by Quantexa |
| | Runs an experiential learning program, Cloud Academy, for its GCP team |
| | Has developed smart document processing solutions using the UiPath platform |

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

Case studies

| Client | Capability | Summary | Business impact |
|--|--|--|---|
| An airline in Qatar | <ul style="list-style-type: none"> • Cloud | <ul style="list-style-type: none"> • The client wanted to improve its brand identity, meet changing customer requirements, and deliver a consistent customer experience. • Virtusa redesigned the client's website by standardizing content across web pages. It implemented the Adobe Experience Manager cloud software to help authors manage content using standard templates and guidelines and ensure consistency in the brand voice, thereby improving customer experience. | <ul style="list-style-type: none"> • Reduced maintenance costs by 30% • Improved business user adoption |
|  Emirates NBD | <ul style="list-style-type: none"> • Cloud | <ul style="list-style-type: none"> • Emirates NBD wanted a development platform for quick ideation with select fintech firms and complying with open banking regulations. • Virtusa designed an Open Banking sandbox on AWS cloud for solution developers and fintechs to create and experiment with applications and services. Application developers have access to transaction data which is based on the BIAN (Banking Industry Architecture Network) model and compliant with ISO20022 standards of Open Banking regulations. | <ul style="list-style-type: none"> • Reduced the onboarding time for fintech firms by 75% |
| A Middle Eastern airline | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The client wanted a facility management system to automate the tracking and monitoring of its buildings' maintenance activity. • Virtusa implemented an automated facility management system built using React, .NET, and SQL Server to speed up the maintenance process through real-time tracking. | <ul style="list-style-type: none"> • Reduced manual efforts by 50% • Improved cost efficiency by 30% • Decreased the turnaround time |
| A Dubai-based bank | <ul style="list-style-type: none"> • Cloud | <ul style="list-style-type: none"> • The bank wanted to reduce its capital expenditures and achieve compliance with the UAE Central Bank standards. • Virtusa used a cloud foundation framework to implement the Microsoft Azure platform. It performed the assessment and ensured compliance with data residency laws for over 180 applications before migrating them from the on-premises data center to the Azure cloud. | <ul style="list-style-type: none"> • Achieved cost savings of 40% |

Analyst insights

Practice maturity



- Virtusa has been operating in the GCC region for the last 10 years. It provides consulting, proof-of-concept development, package implementation, system integration, and application development and maintenance services to its GCC customers, with a value proposition based on cloud transformation, digital automation, and data analytics capabilities.
- It leverages emerging technologies such as the cloud, AI, intelligent automation, cybersecurity, IoT, and blockchain to design new and innovative solutions that create value for its clients. For instance, it helped Mashreq Bank migrate its virtual desktop infrastructure from on-premises to the cloud. Similarly, it helped a Middle Eastern bank with an e-commerce solution to help small and medium enterprises take their products to market.
- It solves business challenges for banking clients with cloud and AI/ML platform modernization; for telecom and media clients with 5G, AI, and virtual and augmented reality technologies; and for healthcare and life sciences clients with IoT, cloud transformation, and data analytics. For instance, it helped a Saudi Arabia-based British bank improve its customer experience through payment modernization.

Investments and innovation



- It has committed \$5M-\$10M for investment in digital services in the GCC region till December 2023. It has invested in setting up centers of excellence and innovation labs in colleges. It works closely with colleges in India to create IPs and solutions for GCC customers.
- It has launched an internship program to promote talent development in the Middle East. Under this program, Saudis and Emiratis are sent to India for training and then deployed in projects in the Middle East.
- It has designed a training program, Engineering IQ, where over 8,000 of its employees have been trained, with plans to train over 5,000 resources in cloud certification over the next three years.

Ecosystem development



- It has leveraged its partner ecosystem and has created go-to-market solutions with providers such as Newgen Software, Volante, Ecolytics, and Thought Machine to define the blueprint for new and innovative offerings.
- It has partnered with cloud service providers, such as AWS, Google Cloud, and Microsoft Azure, to assist clients with cloud migration and automation providers, such as Pega, UiPath, Automation Anywhere, and Blue Prism, to implement RPA for improving customer experience.
- It has partnered with Schneider Electric to help in its emissions inventory and net zero processes. It has also partnered with the startup Expert.ai to integrate environmental, social, and governance risk into Virtusa's Enterprise Risk Management framework by leveraging the open innovation platform.

Wipro: RadarView profile



Practice overview

- Practice size: 800+
- Active clients: 150+
- Delivery highlights: Has a Digital Pod in Dubai to design and deliver digital transformation solutions for GCC clients

| | |
|--|---|
| ~\$1B Revenue from APMEA*, Mar 2022 | 11.3% Revenue share of APMEA*, FY 2022 |
|--|---|

Key digital solutions

| | |
|----------------------------------|--|
| Smart Airport | An IoT solution to handle passenger and flight operations at airport terminals |
| Digital Navigator Advisory (DNA) | A consulting framework for business process change and digital journey road map |
| Intelligent Document Management | A solution to classify and extract information from documents |
| Revenue Cycle Management (RCM) | An AI solution for the healthcare industry to update patient records, streamline medical coding and automate payment processes |

Regional coverage

| |
|----------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★★★
- Ecosystem development ★★★★★

Designed an AI marketplace to bring together enterprises and local talent. Has collaborated with dU to launch a platform for cloud migration.

Sample clients

- Rakbank
- Aramco
- Qatar Post
- A UAE-based digital utility company
- A UAE-based private bank
- A Middle East-based chemical manufacturing company
- A Middle East-based airport company
- A Middle East-based smart city
- A Middle Eastern country's ministry of health

Partnerships/alliances

| | |
|--|--|
| | Supports Qatar-based customers with Microsoft Azure cloud transformation |
| | Partnered with Oman's Ministry of Technology and Communications to speed up the adoption of open-source technologies |
| | Started a joint venture with Saudi's Princess Nourah University to establish a Women's Business Park |
| | Codeveloped a Cyber Defense Centre in the UAE |

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

*Note: APMEA implies Asia Pacific, Middle East, and Africa

Case studies

| Client | Capability | Summary | Business impact |
|--|--|--|---|
| A Middle Eastern country's ministry of health | <ul style="list-style-type: none"> AI Intelligent automation | <ul style="list-style-type: none"> The ministry of health wanted a solution to streamline patient reimbursement by processing records for medical coding and identifying and extracting data from medical records. Wipro used an in-house solution to streamline the medical coding process. It delivered a proof of concept using intelligent automation, AI, and OCR to demonstrate auto redaction of information from medical records. | <ul style="list-style-type: none"> Increased medical coding accuracy by 15% Saved over 100 mins of time per resource per day |
| A Middle East-based chemical manufacturing company | <ul style="list-style-type: none"> AI Intelligent automation | <ul style="list-style-type: none"> The company wanted to streamline its end-to-end sales and operational planning cycle to capitalize on new opportunities. Wipro designed an AI-based sales and operational planning solution in three phases. First, it identified gaps and opportunities in the current process that could be automated. Next, Wipro reimagined the process by applying an AI/ML lens. Lastly, it created an implementation road map with a cost-benefit analysis of the sales and operational planning solution. | <ul style="list-style-type: none"> Delivered an operating margin benefit of \$100M over three years |
| A UAE-based digital utility company | <ul style="list-style-type: none"> Analytics | <ul style="list-style-type: none"> The company wanted to predict asset failures to reduce downtime, optimize management costs, and monitor the health of its assets. Wipro leveraged Cloudera Hadoop, SAP HANA, and Tableau to design a solution to integrate assets, ensure security, and derive insights. It used IPS Energy's asset performance management suite to integrate the company's components. Wipro also created an asset health center to prevent asset failures and improve customer experience. | <ul style="list-style-type: none"> Increased customer satisfaction from 90% to 95% Reduced customer service disruptions Improved the quality of services provided by the company |
| A UAE-based private bank | <ul style="list-style-type: none"> Cloud | <ul style="list-style-type: none"> The bank wanted a unified system to optimize its human resources (HR) processes and enhance the employee experience and productivity. Wipro leveraged its Digital Navigator Advisory framework to develop a project road map and define key performance indicators for the business. It integrated Oracle HCM Cloud with the on-premises Oracle E-Business Suite HCM Payroll application to generate payslips faster. | <ul style="list-style-type: none"> Reduced HR's IT support expenses by 26% Reduced the cycle time by over 35% |

Analyst insights

Practice maturity



- Wipro started its GCC operations in Saudi Arabia and UAE in 2001. It has been offering end-to-end IT services for its GCC clients, such as systems integration, consulting, proof-of-concept development, application development and maintenance, IT infrastructure services, and solution implementation. It has served clients across diverse business sectors, including banking, government, utilities, manufacturing, and travel.
- It has expanded its operations to Qatar, Kuwait, Oman, and other Middle Eastern countries by helping clients with its industry-specific digital solutions that leverage cloud, cognitive computing, robotics, AI, intelligent automation, analytics, and cybersecurity technologies.
- It has solved various business challenges in the GCC region and has designed innovative solutions to contribute to the vision of the region's countries. For instance, it helped a smart city by creating an on-demand secure 5G network for visitors, residents, and businesses by leveraging drones to provide a high-bandwidth network.
- It has created a data-driven AI marketplace for a government body to bring together private and government entities and local talent.

Investments and innovation



- In December 2022, it acquired Capco, a financial services consulting company, to offer transformation and operations services to regional clients.
- It invests heavily in training the local talent on design thinking approaches and emerging technologies to help serve GCC customers better. In May 2022, it hired 500 Saudi professionals to strengthen the local technology talent pool as part of its commitment to KSA Vision 2030.
- It has established a Digital Pod, a digital studio, in Dubai for its digital strategy, solution engineering, and design teams to cater to customers' unique requirements in the Middle East. In June 2021, it established a Cybersecurity Defense Centre jointly with the company dU in UAE to offer innovative cybersecurity solutions for its GCC clients.

Ecosystem development



- It leverages its partnership with technology providers such as Salesforce, Snowflake, Microsoft, AWS, Adobe, Oracle, Pega, Cloudera, Ooredoo Qatar, and SAP. For instance, it implemented the Oracle HCM cloud for a UAE-based private bank to streamline its HR processes. Similarly, it leveraged Microsoft SharePoint to design a collaboration and knowledge-sharing solution for a hospitality and entertainment client.
- In July 2021, it partnered with dU to launch a multicloud platform for cloud migration. It also partners with government entities to support emerging technologies. For instance, it partnered with the Ministry of Technology and Communications, Sultanate of Oman, to speed up the adoption of open-source technologies by establishing a center of excellence.

YASH Technologies: RadarView profile



Practice overview

- Practice size: 125+
- Active clients: N/A
- Delivery highlights: Over 10 delivery centers in the EMEA region

| | |
|--|----------------------------------|
| 1 Acquisition: Soltius ME*, in 2016 | 3 Number of centers in GCC |
|--|----------------------------------|

Key digital solutions

| | |
|-----------------------------|--|
| FinanceOne | An SAP S/4HANA solution to consolidate F&A processes for optimized operational experience |
| iExtractor | A custom solution that uses AI models to automate data extraction from documents |
| Digital Onboarding Solution | A self-service platform for smooth customer onboarding using KYC, AML checks, and face recognition |
| TaxiApp | A platform to design new applications for automated bookings and smooth operations |

Regional coverage

| |
|-----------------------------|
| Bahrain |
| Kuwait |
| Oman |
| Qatar |
| Saudi Arabia |
| United Arab Emirates |

- Practice maturity ★★★★★
- Investments and innovation ★★★
- Ecosystem development ★★

Has designed YASHverse to help GCC clients with immersive experiences. Has codeveloped a solution with C5MI for transforming asset management life cycle.

Sample clients

- Emirates Global Aluminium
- Amico
- A UAE-based conglomerate
- A seafood supplier in the Middle East
- A UAE-based event and exhibition management company
- A UAE-based bank
- A UAE-based F&B company
- A Saudi Arabian manufacturing company

Partnerships/alliances

| | |
|--|---|
| | Partnered to leverage SAP S/4HANA and SuccessFactors to transform business processes |
| | Formed an alliance to utilize Pega solutions to improve operational and customer experience |
| | Partnered to use its RPA capabilities for cost optimization and repetitive tasks |
| | Partnered to use the ServiceNow platform to speed up project deliveries and productivity |

Industry coverage

| |
|--------------------------------|
| Banking |
| Financial services |
| Government |
| Healthcare & life sciences |
| High-tech |
| Insurance |
| Manufacturing |
| Nonprofits |
| Real estate |
| Retail & CPG |
| Telecom, media & entertainment |
| Travel & transportation |
| Utilities & resources |

Darker color indicates higher industry concentration: ●●●●●

*Note: Soltius ME is an IT consulting and services company

Case studies

| Client | Capability | Summary | Business impact |
|---------------------------------------|---|---|--|
| A Saudi Arabian manufacturing company | <ul style="list-style-type: none"> • Cloud | <ul style="list-style-type: none"> • The company's legacy ERP systems led to overhead expenses. It wanted an integrated core HR system to speed up HR processes and an alternative to SAP FIORI for better visibility into leave travel applications. • YASH Technologies implemented a cloud-based SAP SuccessFactors solution that enabled employee central, recruitment and performance management, onboarding, reporting, and recruitment marketing. It made the leave travel application process more efficient through single-click approval. | <ul style="list-style-type: none"> • Accelerated the execution of HR processes by 80% • Improved user experience by 85% • Increased user adoption of HCM processes by 90% |
| A UAE-based F&B company | <ul style="list-style-type: none"> • Intelligent automation | <ul style="list-style-type: none"> • The company wanted to automate the change request management process and enable seamless handling of large volumes of data with better visibility. • YASH Technologies implemented its Change Request Management functionality in SAP Solution Manager. It prepared the scope and objectives for implementation in SAP S/4HANA and assessed the automated solution for cost-benefit analysis. | <ul style="list-style-type: none"> • Provided 100% visibility into change requests at the SAP level • Enabled automated transport requests in quality systems and production systems |
| A UAE-based bank | <ul style="list-style-type: none"> • Analytics • Cloud | <ul style="list-style-type: none"> • The bank wanted to automate the evaluation and management of employees and integrate systems to access workforce information easily. • YASH Technologies deployed SAP SuccessFactors to optimize HR operations and automate manual spreadsheet-based evaluations. It also implemented SAP Analytics Cloud to analyze HR data for faster decision-making. | <ul style="list-style-type: none"> • Reduced CXO turnaround time by 80% • Automated and streamlined HR processes • Increased management satisfaction |
| A seafood supplier in the Middle East | <ul style="list-style-type: none"> • Cloud • Intelligent automation | <ul style="list-style-type: none"> • The supplier wanted to migrate its on-premises SAP applications across geographies to the cloud for low latency and high performance. • YASH Technologies leveraged the FleXtreme global AMS framework to implement a ticket-based model to support the SAP SuccessFactors application and S/4HANA modules on the AWS platform. It also created a disaster recovery solution to access AWS resources and get clear visibility through Amazon CloudWatch and Amazon CloudTrail. | <ul style="list-style-type: none"> • Improved SAP application performance by 50% • Automated operational tasks to save bandwidth of six workdays per month • Optimized delivery vehicle fleet performance |

Analyst insights

Practice maturity



- With over 15 years of experience serving customers in the Middle East, YASH Technologies provides IT services across advisory and consulting, testing, application development and maintenance, system integration, solution implementation, and customer experience.
- It leverages innovative solutions and emerging technologies, such as advanced analytics, intelligent automation, and the cloud, to automate business processes for improved efficiency, user experience, and faster decision-making.
- It leverages its partner solutions to drive value for GCC customers by increasing customer satisfaction and reducing costs. For instance, it implemented a Microsoft Dynamics customer relationship management solution for a government event and exhibition management company in the UAE to increase customer satisfaction and improve sales revenue. It also helped a UAE-based government-owned investment company implement SAP SuccessFactors' Employee Central to reduce HR costs by 7%-10% and overall workload by 90%.
- With the creation of YASHverse, a metaverse solution, it focuses on future technologies to give regional customers an immersive experience.

Investments and innovation



- It launched a metaverse-as-a-service offering at GITEX Global 2022 in Dubai to help regional clients reimagine immersive experience by leveraging metaverse capabilities.
- It participates in innovation conferences and events to showcase its technical capabilities. For instance, in March 2022, it participated in the Gulf Information Security Expo & Conference at Dubai World Trade Center.

Ecosystem development



- It has expanded its partner ecosystem with providers such as Oracle, SumTotal, IBM, SAP, Worksoft, QAD, Salesforce, OutSystems, Cisco, DELL, and Citrix. For instance, it leverages its partnership with SAP to utilize its SAP modules to drive operational efficiency for customers.
- It has partnered with automation providers such as UiPath, Automation Anywhere, and Pega to leverage its automation capability to streamline business processes. It has partnered with Microsoft and AWS to help customers with their cloud migration journey.
- Its DRCM® (Digital Reliability Centered Maintenance), a solution codeveloped with C5MI, helps accelerate transformation across the asset management life cycle.

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