

# MENA Digital Transformation Market Outlook 2021

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## Abstracts

Digital Transformation is defined as the application of technology to profoundly enhance performance of enterprises and extend their reach to customers. To achieve this, executives from different industries are focusing on implementation of digital platforms including social media, analytics, mobility and smart devices in their organization. In addition to that, effort is also being laid on improving traditional systems such as Enterprise Resource Planning (ERP), with an aim of transforming internal process, value propositions and customer relationships.

The Middle East and North Africa (MENA) digital transformation market was valued at USD 1,121.4 Million in 2015 and is forecasted to reach at USD 2,791 Million by 2020, garnering a compound annual growth rate (CAGR) of 16.4%. With 31.2% share in 2015, Saudi Arabia held the largest digital transformation market in the MENA region and is further forecasted to continue its dominance by the end of 2021.

Increasing e-government and smart city initiatives, growing internet penetration and social media usage, rapid adoption of digital services in BFSI sector and enterprise mobility are forecasted to be major growth drivers of MENA digital transformation market over the forecast period i.e. 2015-2021.

However, high switching cost and increasing threat of cybercrimes are anticipated to dampen the MENA digital transformation market growth over next few years.

MENA digital transformation market is segmented on the basis of digital service, digital software and by verticals. The digital software market is further segmented into digital content and application, digital sales and commerce, digital marketing, digital customer experience and service and digital integration platform. Among these, digital integration platform software is forecasted to witness the highest compound annual growth rate (CAGR) of 21.7% during the forecast period i.e. 2015-2021.

On the basis of digital service, the market is divided into digital consulting, digital technology implementation, digital technology integration and digital operation and management. With 44.6% share in 2015, digital technology implementation held the largest market in the MENA region. Rising adoption of digital devices by small and large scale enterprises is expected to be a key growth driver of digital technology implementation market in MENA region.

Digital transformation market in MENA region is segmented on the basis of industry verticals into BFSI, Energy & Utilities, healthcare, media and entertainment (M&E), manufacturing, public sector, retail, service, telecom and transportation and distribution verticals. With 24.5% share in 2015, BFSI held the largest digital transformation market in 2015 and is further portrayed to flourish at a robust CAGR of 17.9% over the forecast period i.e. 2015-2021. Rising e-banking initiatives is anticipated to escalate the growth of digital transformation in BFSI sector over next few years.

Conclusively, more and more enterprises are expected to adopt digital transformation in MENA region in order to develop better customer understanding, top-line growth, customer touch points, process digitalization, performance management, etc. and remain competitive in the global market place. Moreover, digital transformation is also projected to garner smart cities development to raise quality of living in future

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