KPMG

UAE tech report 2024

AI, data, and sustainability in focus

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Foreword

Exceptional leadership in the digital age is defined by vision, resilience and a commitment to sustainability. The region's strategic investments and policies are setting new standards in innovation, fueled by advancements in a broad array of technologies including blockchain, internet of things (IoT) and artificial intelligence. These technologies are not only redefining industry paradigms but also creating a dynamic environment for growth and development.

As the UAE positions itself as a global technology hub, the integration of cutting-edge solutions is essential for maintaining competitiveness and fostering economic growth. The government's forward-thinking initiatives and substantial investments in digital infrastructure are catalyzing this technological evolution, paving the way for a new era of innovation.

Amid this landscape, three technologies are particularly pivotal: artificial intelligence (AI), cloud computing, and environmental, social, and governance (ESG) technology. AI is driving significant advancements in automation, data analytics and customer engagement, revolutionizing how businesses operate and make decisions. With Azure and AWS now having their data centers in the UAE, cloud computing offers unparalleled scalability and flexibility, crucial for managing and analyzing vast amounts of data generated by digital processes. Meanwhile, ESG considerations are becoming central to strategic decision-making, reflecting a commitment to sustainable practices and ethical governance in an increasingly interconnected world.

Drawing from extensive research and insight, this report provides a view of key trends and priorities impacting the tech industry in the UAE and worldwide, with a focus on AI adoption, data management and technological innovation. We surveyed 2,450 technology professionals globally, including 70 in the UAE, across the consumer and retail, higher education, energy, financial services, government and public sector, healthcare, industrial manufacturing, life sciences and pharmaceuticals, and technology industries. The sizes of UAE respondents' companies varied between less than 100 employees to more than 10,000. All their companies reported USD 250 million or above in annual revenue.

Looking ahead, tech leaders in the UAE and globally are expected to address data security, accessibility and interoperability as top priorities. Cloud platforms and anything as a service (XaaS) are recognized for their positive impact on data management, security and efficiency. However, there is a clear need for data-centric decision-making in the UAE.

This analysis offers actionable insight into technology prioritization, investment strategies and the evolving role of AI. We hope it will help your company enhance organizational resilience and drive sustainable growth in the digital age.

Looking ahead, tech leaders in the UAE and globally are expected to address data security, accessibility and interoperability as top priorities.

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Highlights

73%
of tech leaders in the UAE foresee AI revolutionizing knowledge creation and leading practices.

89%
believe investment in AI and automation has positively impacted profitability in the past 24 months.

67%
are satisfied with the amount of value generated through technology investments.

96%
are planning to invest in XaaS technologies, including public/ multi-cloud.

70%
acknowledge that the skill-gap is now being addressed through advancements in AI.

37%
are focusing on data accessibility/ democratization over the next 12 months.

13%
have prioritized enhancing data quality and governance to address key challenges.

14%
believe concerns with compliance will slow down their digital transformation journeys.

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01

AI and advanced technologies

In the context of digital transformation priorities, UAE tech leaders place a higher emphasis on fostering empathetic communication between business functions (20% versus 11% globally), improving the tech literacy of employees (14% versus 11% globally), and maintaining change momentum (14% versus 11% globally). This strategic focus indicates that UAE organizations are positioning themselves to leverage internal strengths and human capital as foundational pillars for their digital initiatives. Notably, the prioritization of communication and change momentum reflects an understanding of the region's rapid economic growth and the need for continuous adaptation. Furthermore, enhancing tech literacy and embracing emerging technologies align with global best practices in digital maturity frameworks.

Globally, there is a stronger focus on listening and adapting to the voice of the customer (10% UAE versus 10% globally), responding to market signals with agility and accuracy (7% UAE versus 10% globally), extracting valuable organizational insight from vast datasets (9% UAE versus 10% globally), and ensuring cybersecurity and privacy considerations guide technology priorities (10% UAE versus 13% globally).

Overall, while the UAE prioritizes internal capabilities and communication, global tech leaders emphasize responsiveness to external market dynamics and data-driven insight. UAE tech leaders are distinctly prioritizing empathetic and effective communication between business functions (20% versus 11% globally), maintaining change momentum (14% versus 11% globally), improving the tech literacy of employees (14% versus 11% globally), and having the courage to strategically embrace emerging technologies (13% versus 12% globally).

Consequently, as global counterparts may lean towards external market dynamics and data-driven insight, UAE tech leaders are fostering robust internal ecosystems that can adapt and thrive in the face of continuous technological advancements and disruptions.

Which of the following attributes is the most essential for organizations to thrive in a digital economy?

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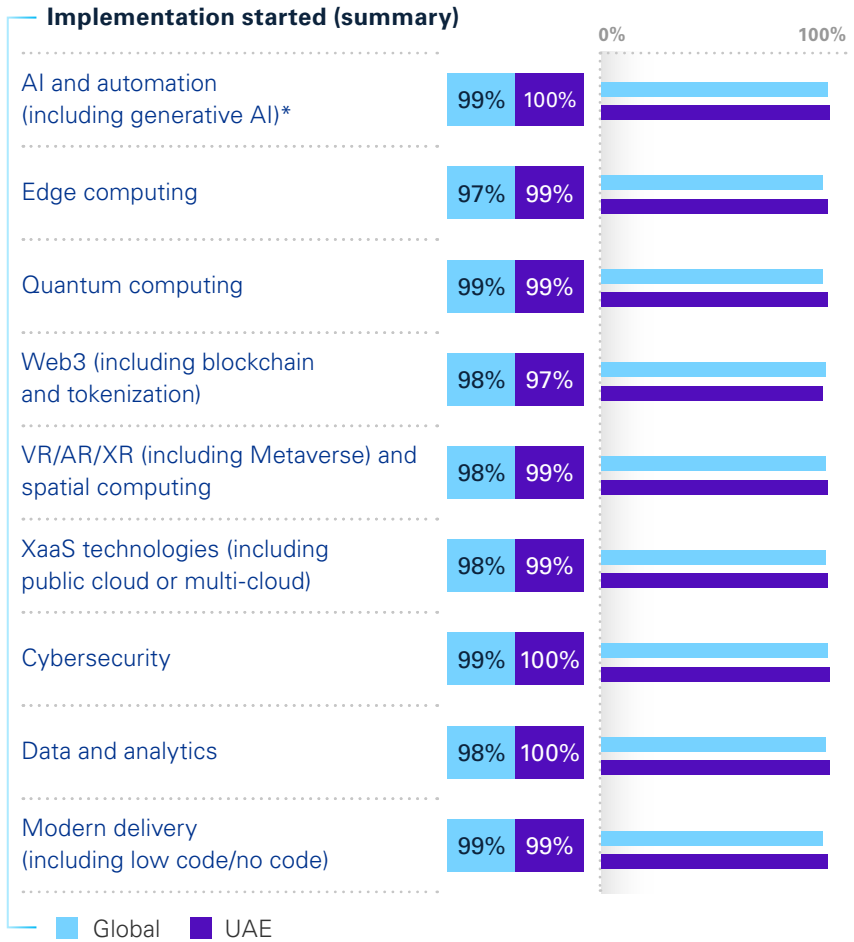

How would you describe your organization's position today in each of the following areas?

Local tech leaders show a higher adoption of edge computing (99%) compared to the global average (97%), reflecting their focus on enhancing real-time data processing and reducing latency, crucial for supporting IoT and other advanced applications. The widespread adoption of cybersecurity measures by tech leaders in the UAE (100%) and globally (99%) underscores their commitment to safeguarding digital assets and maintaining robust security postures amid evolving threats. UAE leaders and firms face slightly more challenges (30%) in executive buy-in and investment approval, which could indicate higher expectations or strategic ambitions requiring significant endorsement. Consequently, significantly fewer UAE tech leaders (3%) are in the early strategic design phase compared to the global average (11%), suggesting more advanced stages of AI implementation in the UAE.

Additionally, UAE tech leaders have showcased full adoption of AI and automation, with an implementation rate of 100% aligning with the global technological advancement trend – thereby demonstrating the UAE's strategic prioritization of AI-driven efficiencies and innovations. Similarly, 100% of UAE leaders have identified the need for implementing data analytics, highlighting their commitment towards data-driven decision making and seeking competitive advantage.

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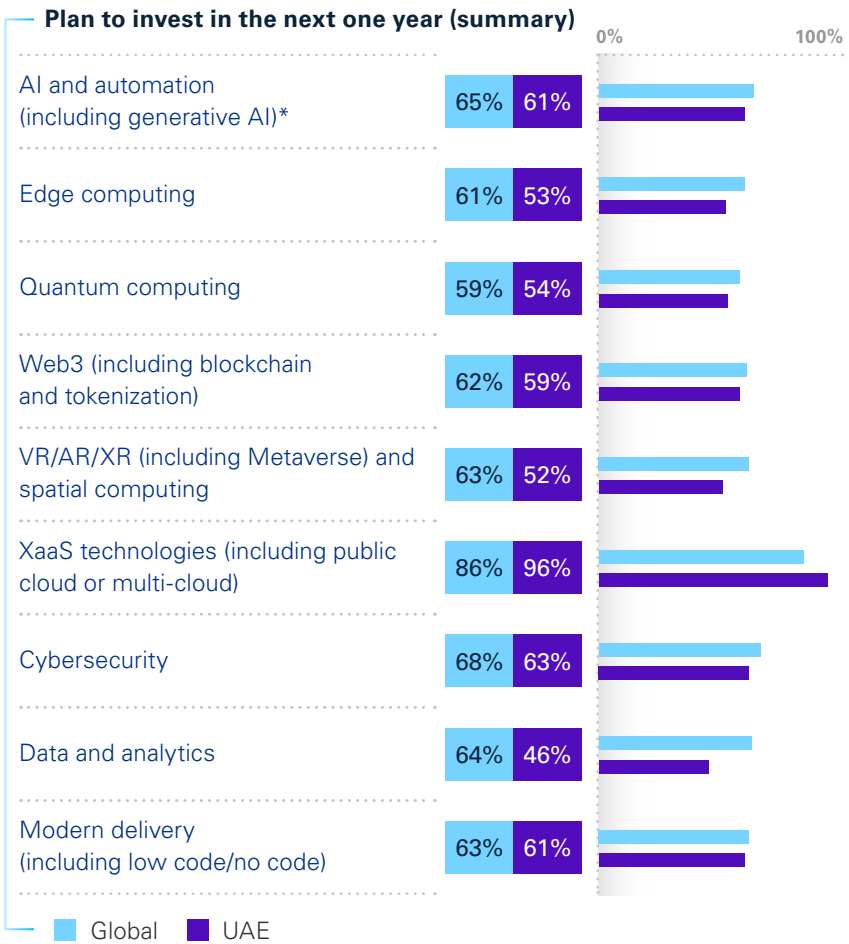
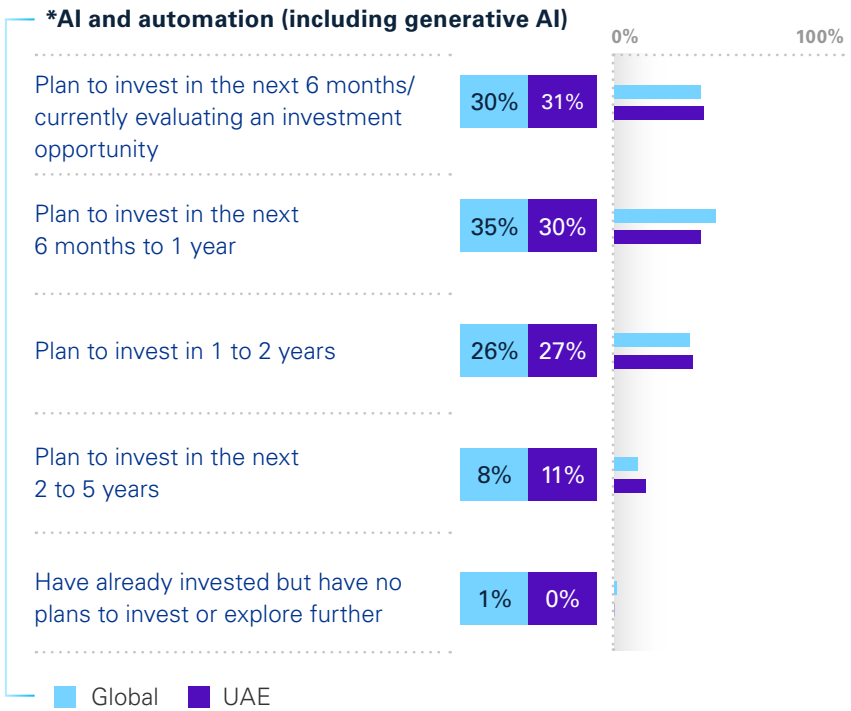
Of the following technologies, which is your organization currently prioritizing and investing in to support its ambitions?





Tech leaders are planning significant investments over the next year, with a strong focus on XaaS technologies including public/multi-cloud (96% in the UAE and 86% globally). Investments in AI and automation, including generative AI, are at 61% (versus 65% globally), edge computing at 53% (versus 61% globally), quantum computing at 54% (versus 59% globally), and Web3 technologies at 59% (versus 62% globally). Additionally, 52% plan to invest in VR/AR/XR, including the Metaverse (versus 63% globally), 63% in cybersecurity (versus 68% globally), and 61% in modern delivery methods like low code/no code (versus 63% globally). Notably, data and analytics see lower investment plans in the UAE at 46% compared to 64% globally.

As for AI and automation investments, 31% of UAE tech leaders plan to invest within the next six months, just above the global average of 30%. For the next six months to one year, 30% of UAE tech leaders plan to invest compared to 35% globally. The UAE shows a 100% intent to invest in the top four categories within two years, similar to the global average of 99%.

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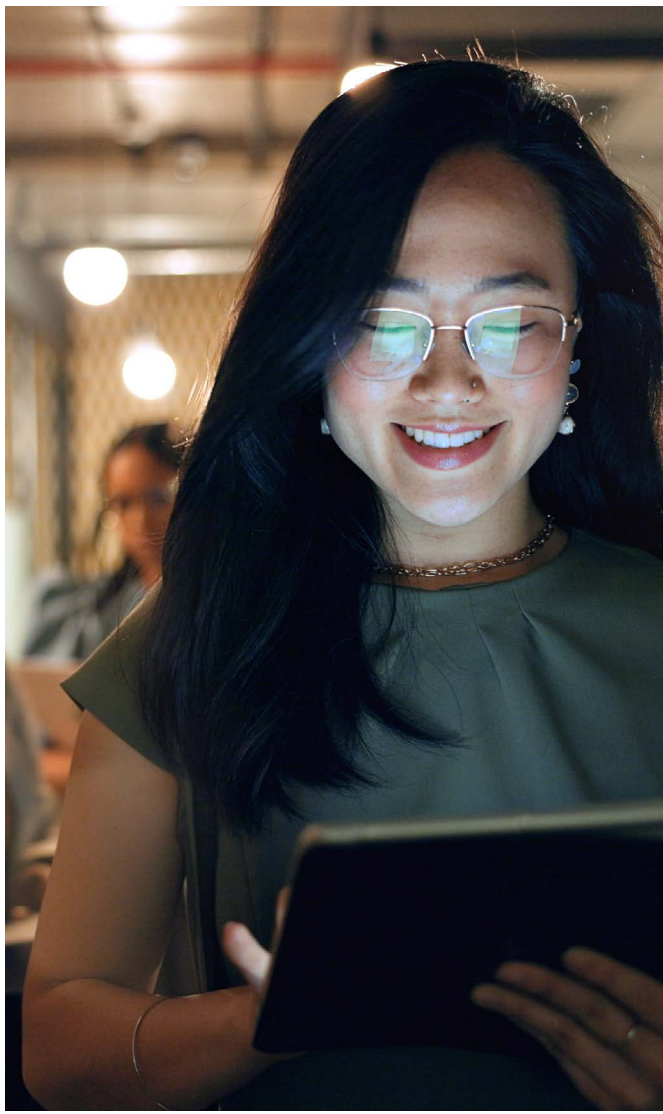
Why is your business prioritizing these technologies to support its ambitions?

AI and automation (including generative AI)

Cybersecurity



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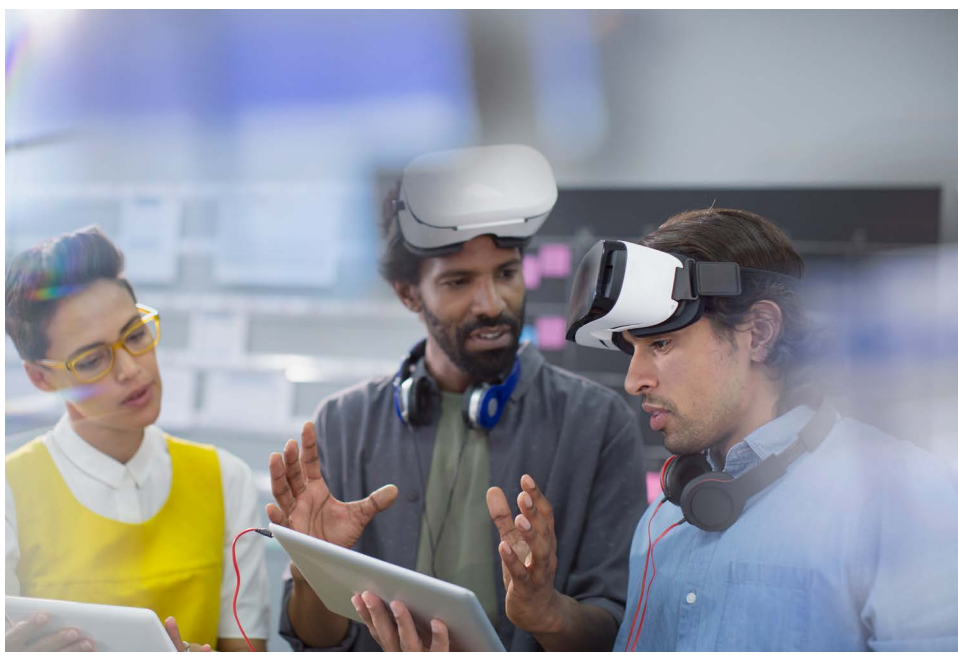
Proven ROI for AI and automation influences 20% of global tech leaders compared to only 14% in the UAE, suggesting that ROI metrics are still maturing in the region, or that UAE leaders place higher value on other factors like strategic alignment, innovation potential, customer feedback and competitor trend adoption. ESG outcomes have a slightly lower influence in the UAE at 4% compared to 5% globally, indicating that while important, they may not be the primary driver for AI and automation investments in the region.

Additionally, UAE organizations are conducting fewer in-house trials and proof-of-concept testing for edge computing (24% versus 30% globally), which may suggest either a greater reliance on external solutions or a faster adoption pace with less internal testing. Significantly less UAE tech leaders are also prioritizing edge computing for third-party guidance (including regulators) at only 13% compared to 28% globally, highlighting confidence in their internal capabilities.

However, for cybersecurity, 27% of UAE tech leaders are still looking for guidance from third parties and regulators which is in line with global responses (28%). A higher percentage of UAE tech leaders (21% versus 13% globally) consider the preferences of their senior leadership team, emphasizing the influence of top executives in strategic technology decisions. Cost effectiveness is significantly more influential in the UAE at 23% compared to 11% globally, reflecting financial prudence and the need to justify cybersecurity investments.

In the UAE, customer feedback regarding data and analytics is significantly less influential at 7%, compared to 19% globally. This suggests that data and analytics investments are more driven by strategic needs than direct customer input.



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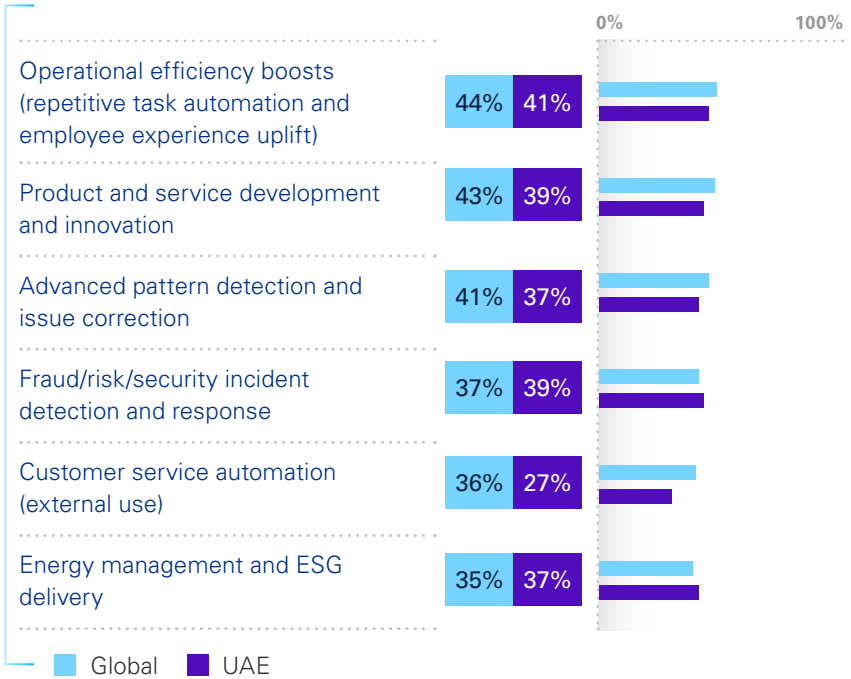
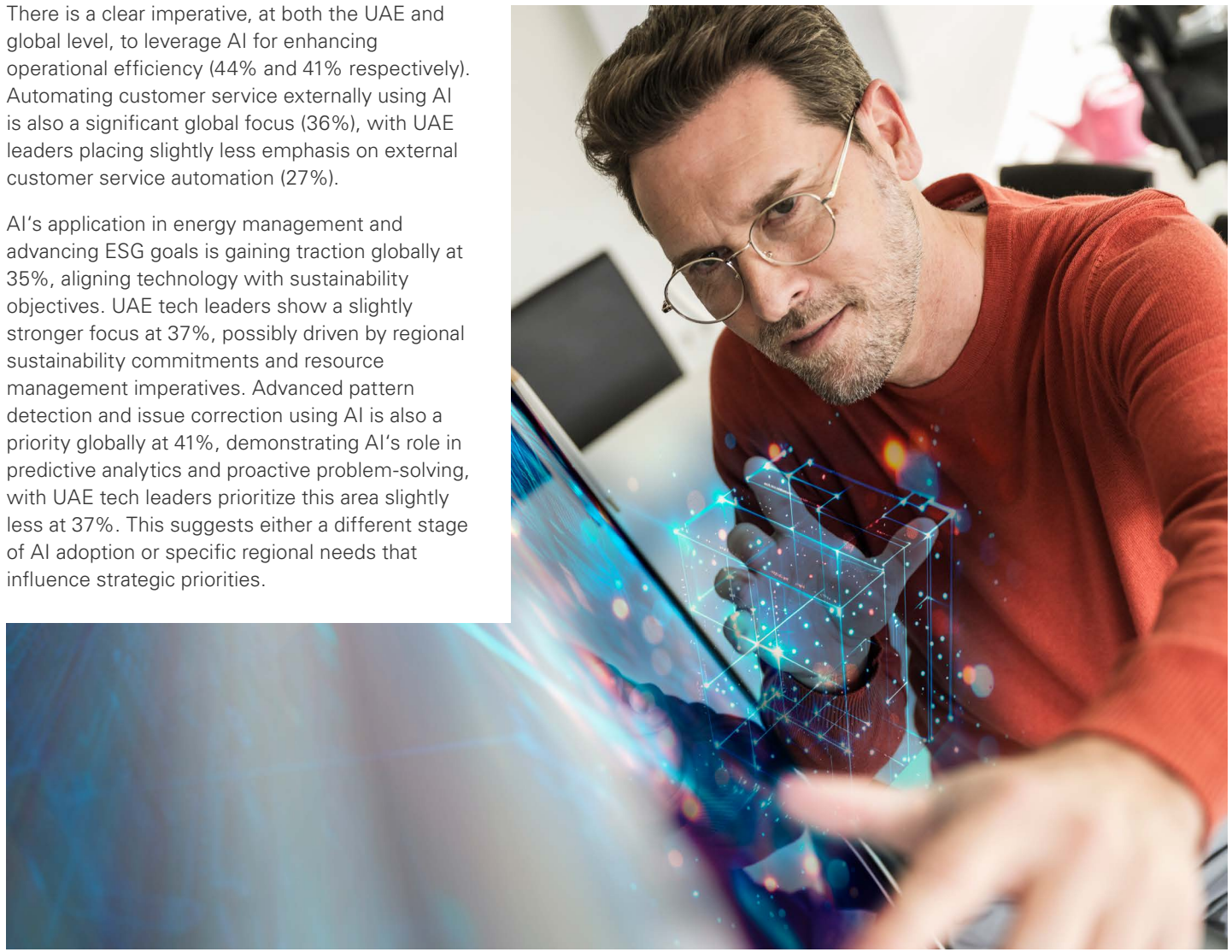
As you selected AI as a priority technology, could you detail what your short-term goals are for leveraging AI over the next two years?



There is a clear imperative, at both the UAE and global level, to leverage AI for enhancing operational efficiency (44% and 41% respectively). Automating customer service externally using AI is also a significant global focus (36%), with UAE leaders placing slightly less emphasis on external customer service automation (27%).

AI's application in energy management and advancing ESG goals is gaining traction globally at 35%, aligning technology with sustainability objectives. UAE tech leaders show a slightly stronger focus at 37%, possibly driven by regional sustainability commitments and resource management imperatives. Advanced pattern detection and issue correction using AI is also a priority globally at 41%, demonstrating AI's role in predictive analytics and proactive problem-solving, with UAE tech leaders prioritize this area slightly less at 37%. This suggests either a different stage of AI adoption or specific regional needs that influence strategic priorities.



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02

Strategic alignment, data accessibility and governance

Which of the following are true about your organization's decision-making processes for tech investments?

Globally, 74% of respondents consider the needs of customers, employees and stakeholders when making decisions for tech investments, compared to 67% in the UAE. Regarding process clarity and consistency, 73% of global tech leaders report clear, consistent processes, with UAE leaders coming in slightly higher at 76%. Cybersecurity involvement from the earliest planning stages is prioritized by 72% globally and 73% in the UAE.

73% globally and in the UAE reported achieving efficient consensus-building between stakeholders when it comes to investments in technology. In addition, 75% of the surveyed leaders globally and 69% in the UAE have a clear understanding of the critical factors that impact their organization during the decision-making process. Accurate total cost of ownership and cost-benefit analysis forecasts are reported to be 73% globally and 71% in the UAE. This comparison highlights that while UAE tech leaders excel in process clarity and early cybersecurity involvement, there is a gap in understanding critical decision factors and achieving profitable and risk-averse decision-making outcomes, suggesting opportunities for strategic improvements in these areas.

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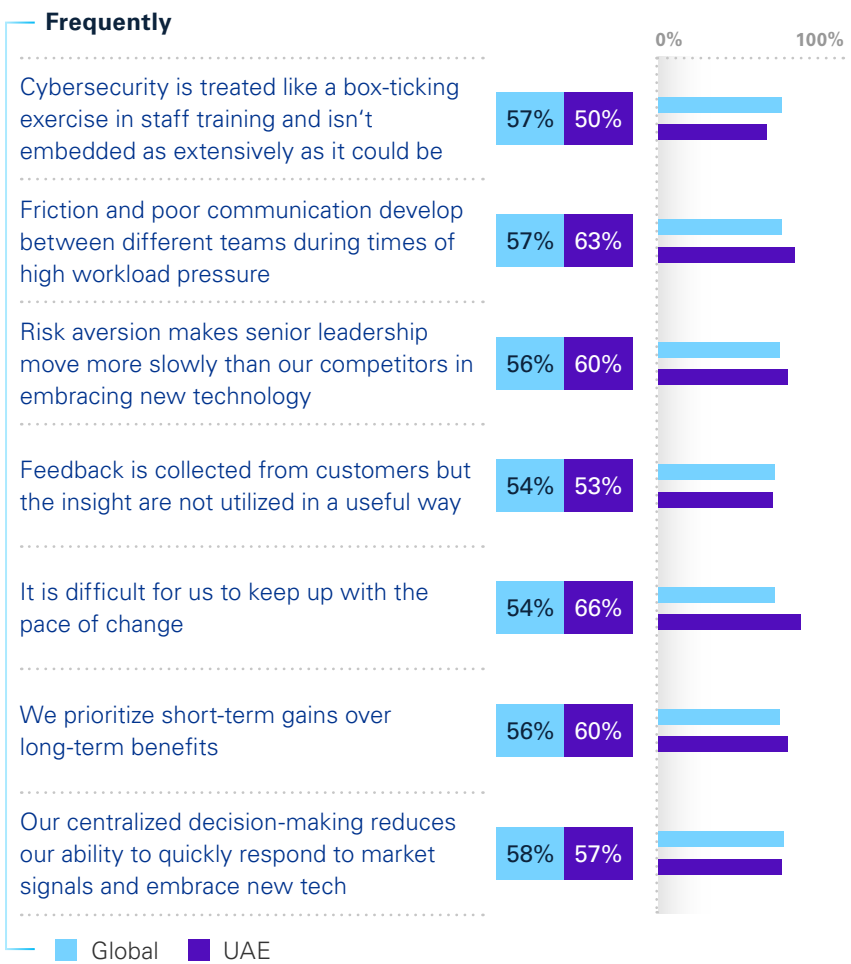
How often, if at all, do the following situations occur within your business?

In the UAE, 50% of respondents frequently treat cybersecurity as a box-ticking exercise in staff training, compared to 57% globally. Friction and poor communication are also common during high workload pressure according to 63% in the UAE and 57% globally. Risk aversion in senior leadership affects 60% of UAE tech leaders, slightly higher than the global average of 56%.

Both UAE and global leaders find that customer feedback is not utilized effectively, at 53% and 54% respectively. A significant 66% of UAE respondents find it challenging to keep up with the pace of change, compared to 54% globally, with short-term gains prioritized over long-term benefits by 60% in the UAE, slightly higher than the global figure of 56%.

In terms of responding to market signals and embracing new technology, 58% globally and 57% in the UAE said their organizations' abilities are being limited by centralized decision-making processes.



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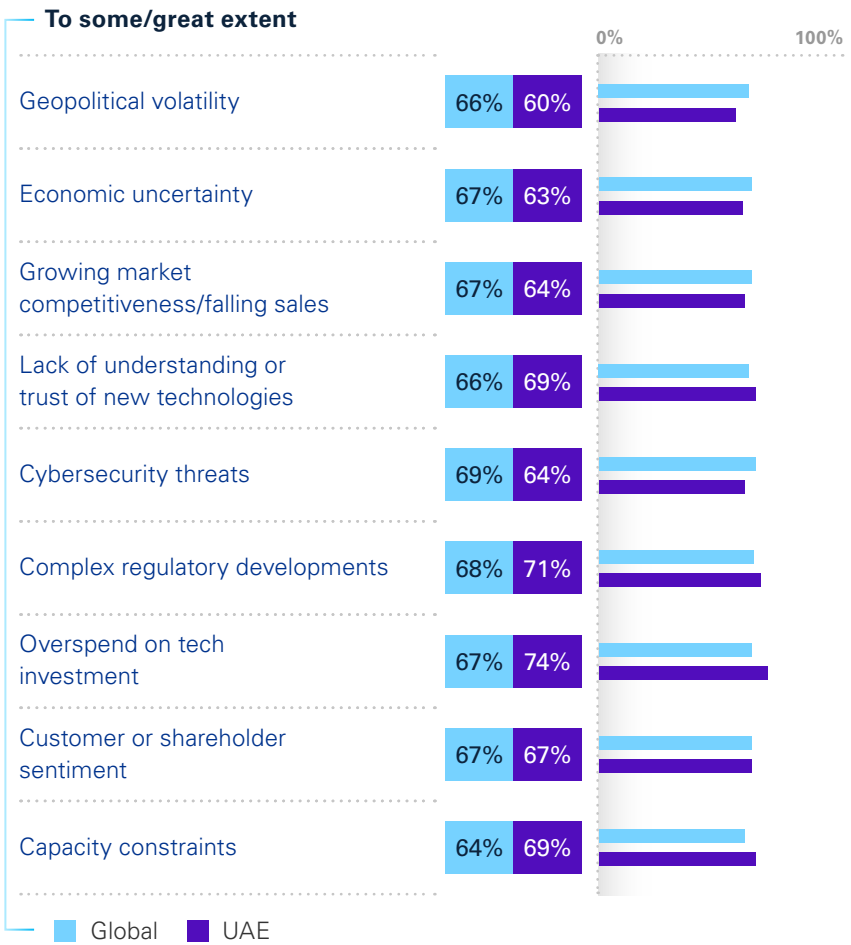
To what extent, if at all, have the following factors made your business feel less confident about investing in new technology?



In the UAE, 60% of respondents feel impacted by geopolitical volatility to some or a great extent, compared to 66% globally. Economic uncertainty also affects 63% of UAE tech leaders' confidence to invest in new technology, with 67% of their global counterparts feeling the same. Growing market competitiveness or falling sales are concerns for 64% in the UAE versus 67% globally. As for the lack of understanding or trust in new technologies, both UAE and global respondents consider this a challenge at 69% and 66% respectively.

64% in the UAE and 69% globally are also worried about cybersecurity threats, coupled with complex regulatory developments (71% in the UAE and 68% globally). Overspend on tech investment is a significant issue for 74% in the UAE, higher than the 67% global average, in addition to capacity constraints (69% locally and 64% globally) and customer or shareholder sentiment, which affects 67% of respondents in both the UAE and globally.

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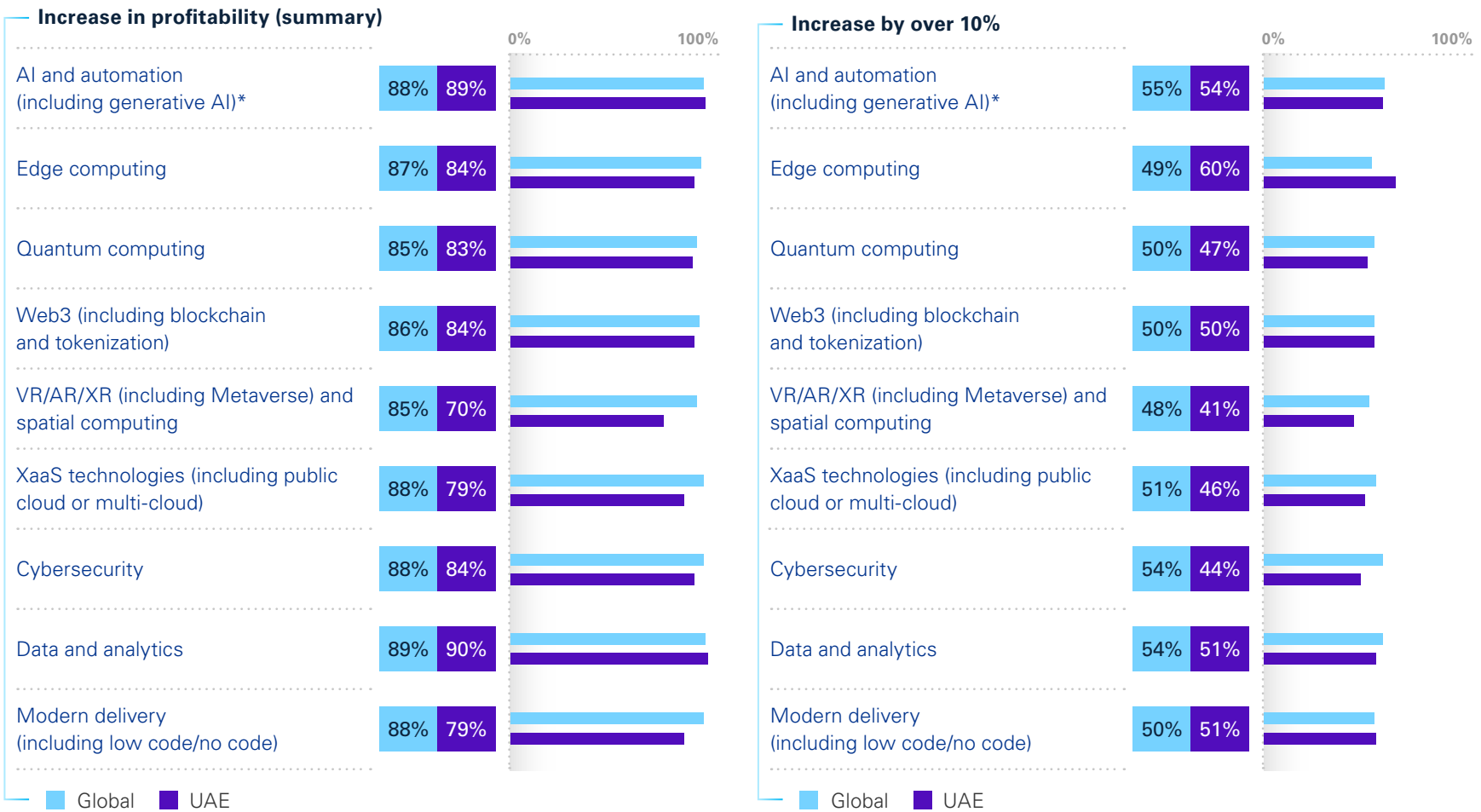
Over the past 24 months, have your digital transformation efforts with the following technologies positively impacted your organization's profitability? If so, what was the approximate size of the increase?



In the UAE, the majority of tech leaders (90%) saw an increase in their organizations' profitability as a result of investments in data and analytics over the past 24 months, followed by AI and automation including generative AI (89%) and cybersecurity (84%).

Globally, more than half (55%) of tech leaders reported over 10% growth from AI and automation, similar to the UAE (54%). As for edge computing, profitability also increased for 60% in the UAE and 49% globally. Profitability with data and analytics grew according to 54% globally and 51% in the UAE, while modern delivery drove profitability for 50% globally and 51% in the UAE. This highlights local tech leaders' robust commitment to digital transformation, in-line with substantial investment in technology capabilities globally.

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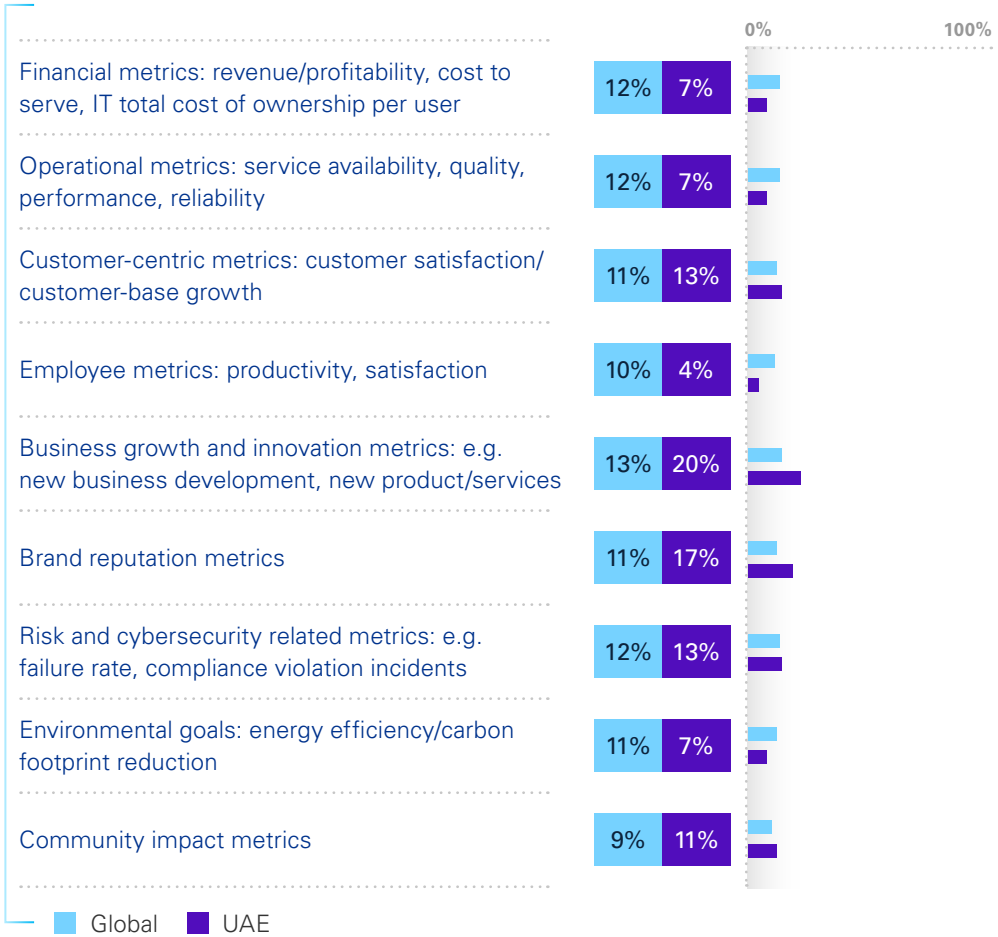
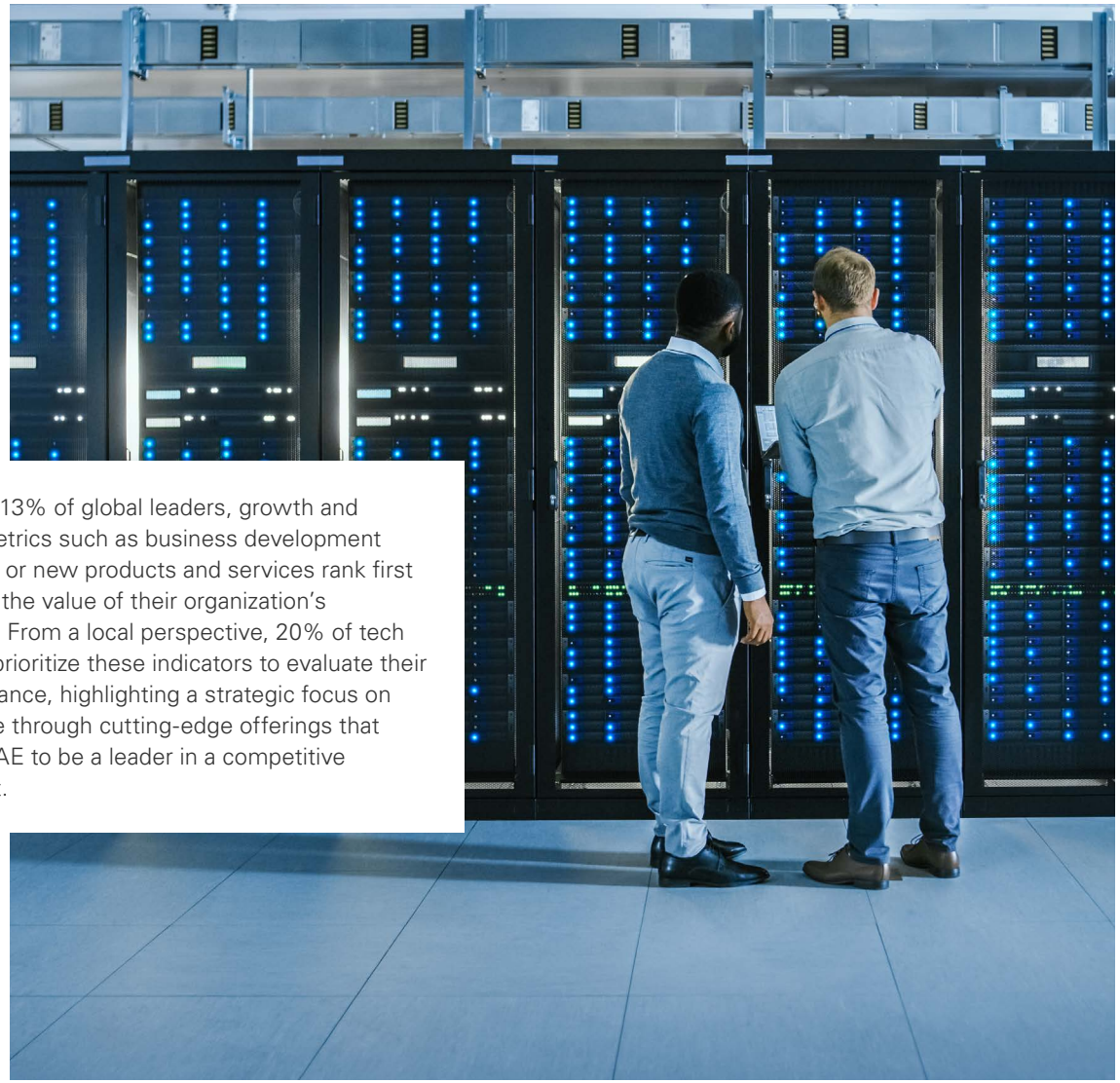
Which of the following performance indicators are most important for your organization to define/measure the value of its technologies?





According to 13% of global leaders, growth and innovation metrics such as business development opportunities or new products and services rank first in measuring the value of their organization's technologies. From a local perspective, 20% of tech leaders also prioritize these indicators to evaluate their tech performance, highlighting a strategic focus on creating value through cutting-edge offerings that enable the UAE to be a leader in a competitive global market.

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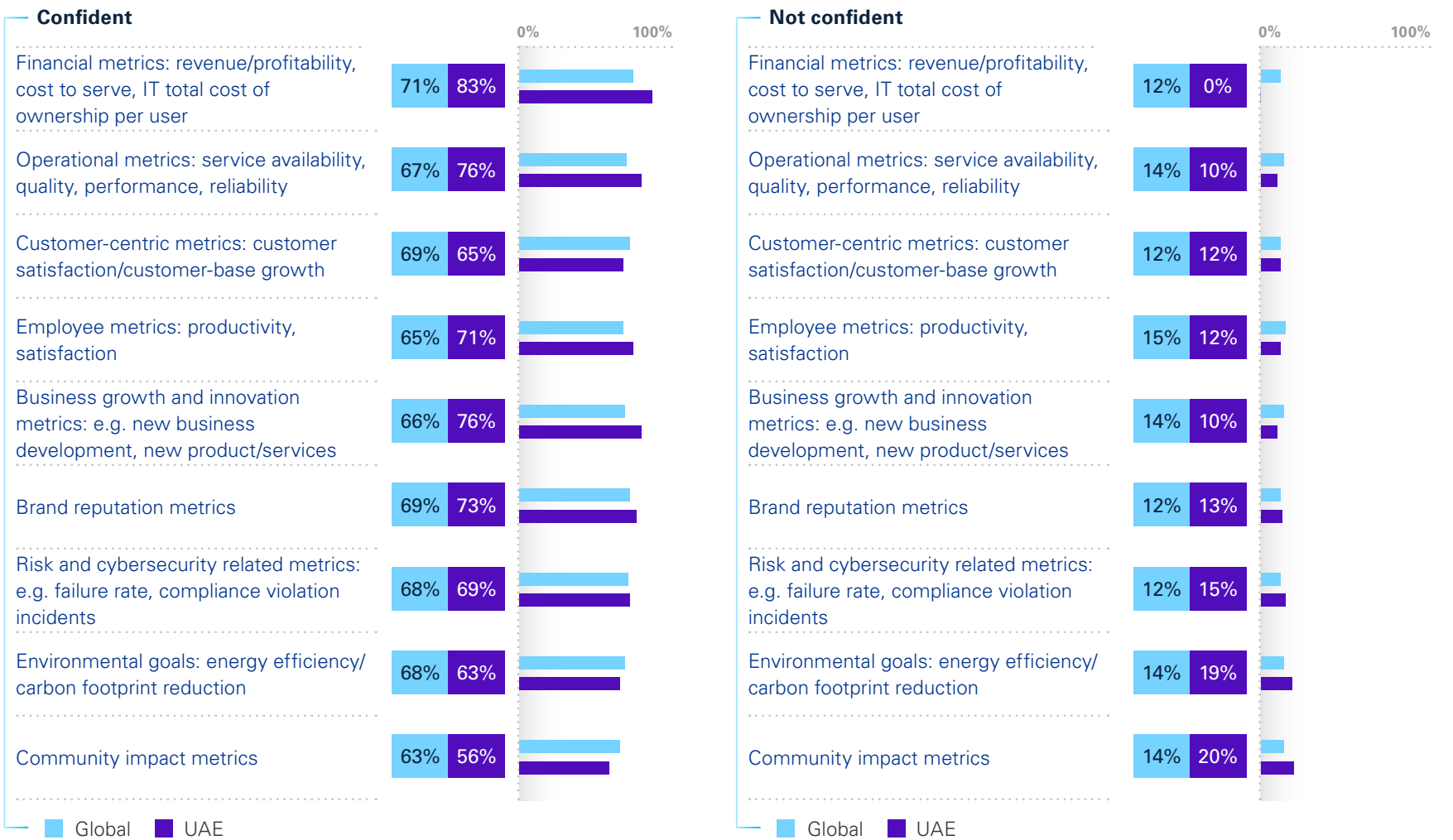
For each metric, please indicate how confident you are in your company's ability to quantitatively measure the value being generated by your technologies.



From a global perspective, 71% of tech leaders are confident in their ability to measure the value of their organization's technologies through financial metrics such as revenue/profitability, cost to serve, IT total cost of ownership per user. There is even higher confidence in financial metrics among UAE leaders at 83%.

However, tech leaders in the UAE express that they do not rely on environmental goals (19%) and community impact metrics (20%) in quantifying the value generated by their technologies, indicating potential areas for improvement in measurement frameworks related to sustainability and social impact.

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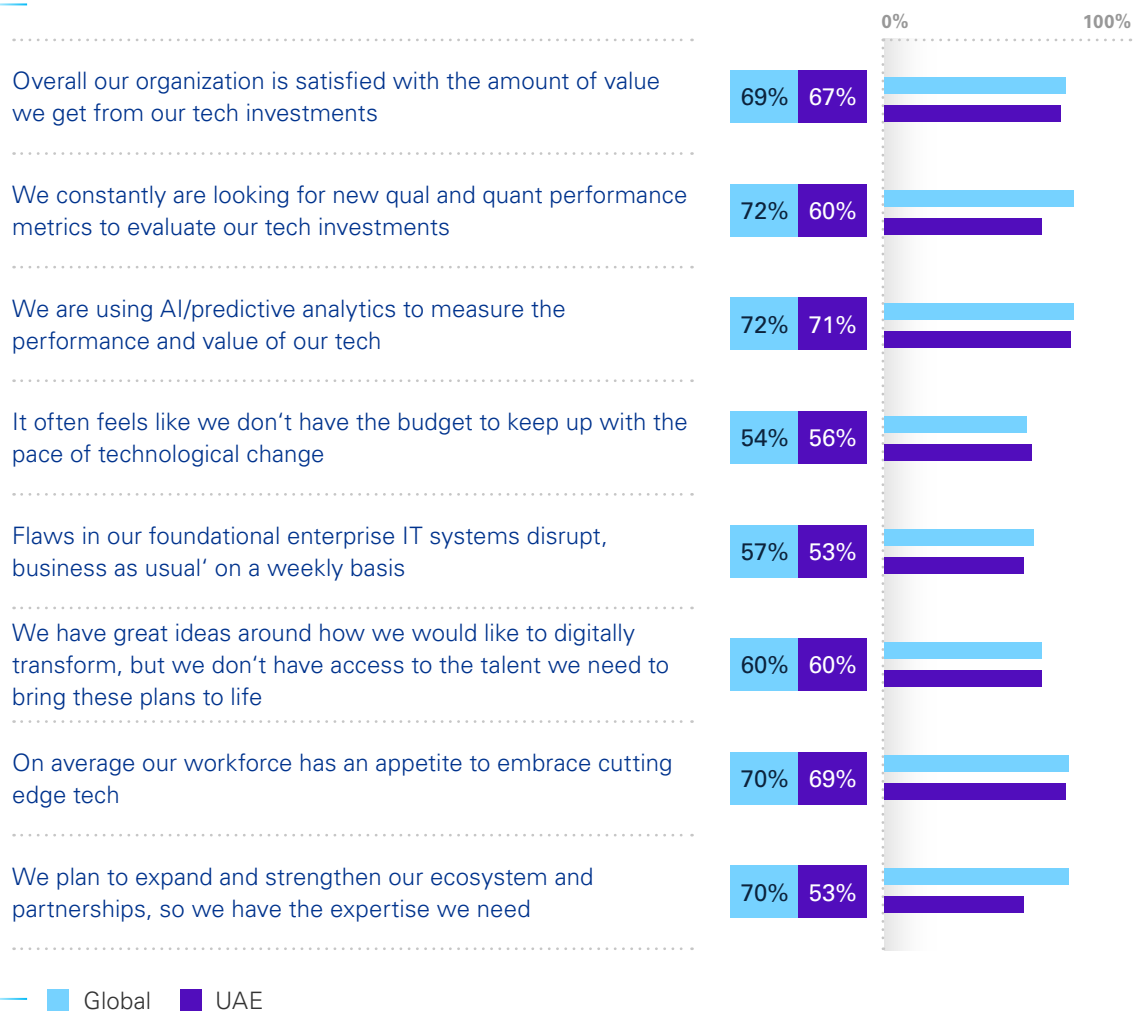
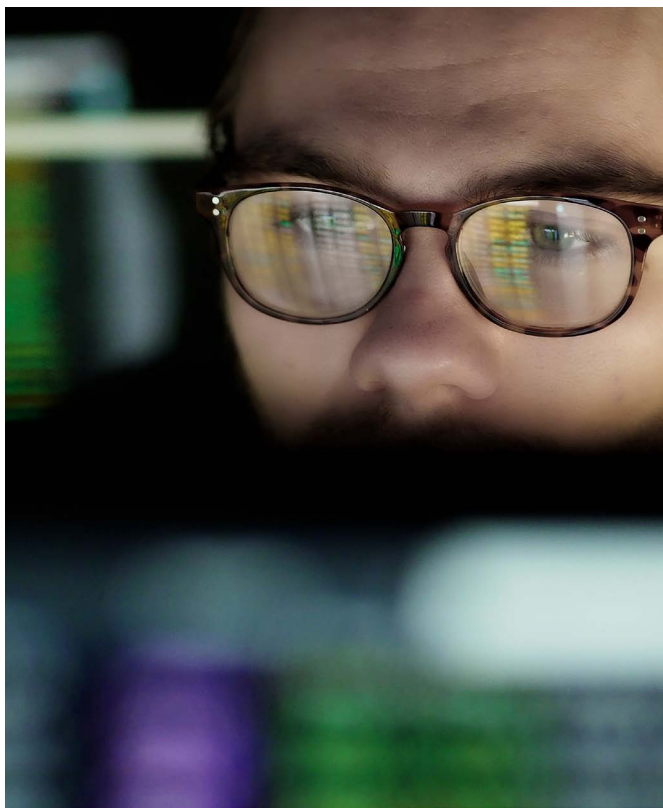
Please indicate whether you agree with the following statements.



69% of tech leaders worldwide are satisfied with the value derived from their technology investments, with 67% in the UAE showing strong agreement. Both global (72%) and local (71%) tech leaders are using AI and predictive analytics for measuring tech performance and value of their tech investments, highlighting widespread adoption of advanced analytics for decision-making. Regarding workforce readiness, 70% globally and 69% in the UAE believe their teams are eager to embrace cutting-edge technologies.

While tech leaders recognize the role of technology in driving business transformation, more than half (54% globally and 56% in the UAE) feel it is a challenge to keep up with the pace of technological change due to budgeting constraints. Both groups also face talent shortages, with 60% agreeing they lack the necessary talent to fully execute digital transformation plans.

Looking ahead, 70% globally plan to expand and strengthen their organizations' ecosystems and partnerships to access the expertise they need, with 53% of local tech leaders in the UAE sharing similar plans.



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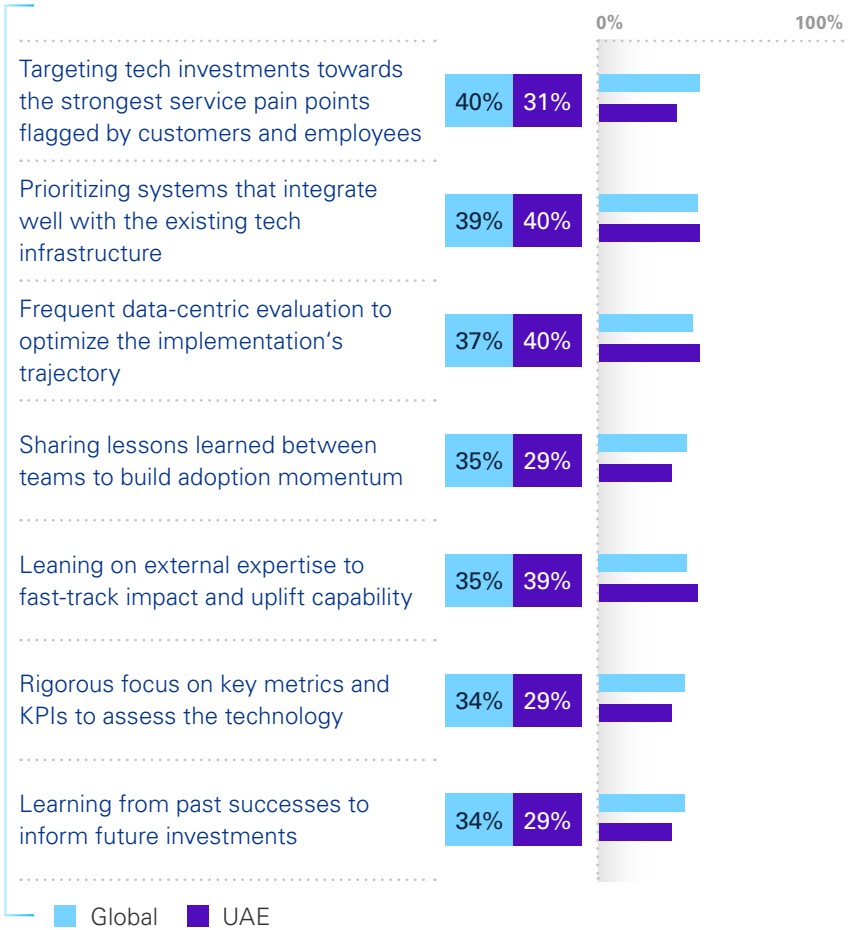
03

Measuring outcomes and digital transformation priorities

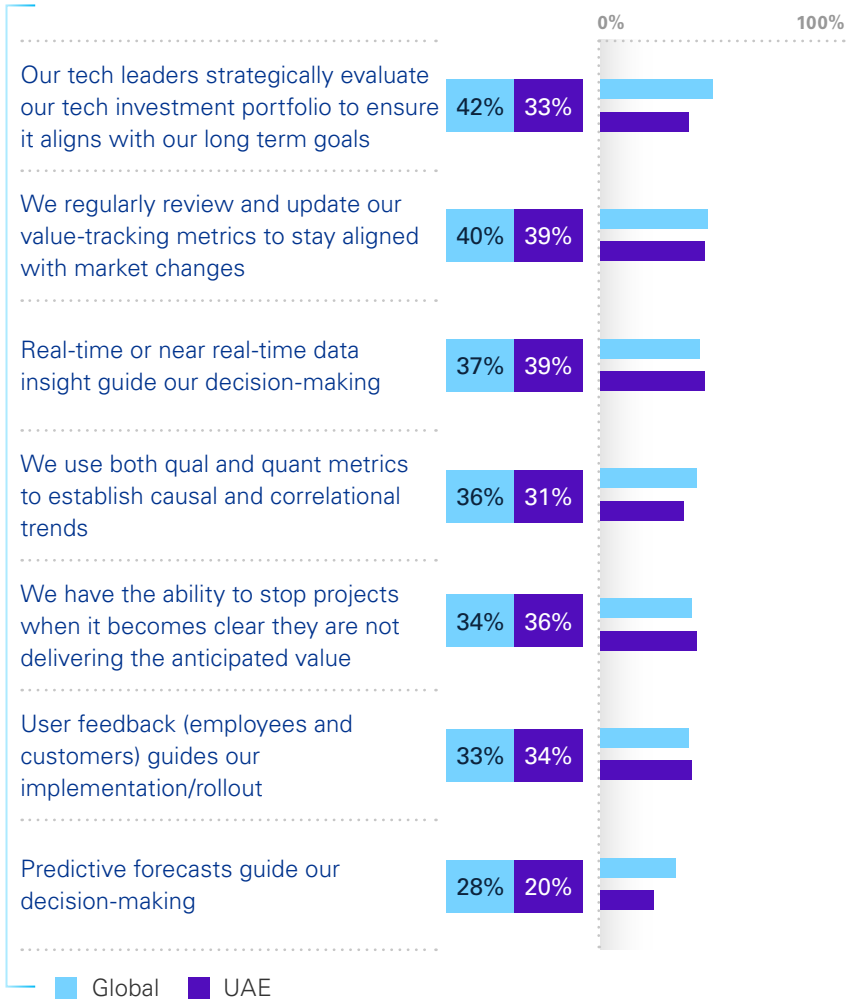
In your experience, which tactics have been the most influential to achieve quick wins from your technology investments?



Targeting tech investments at service pain points flagged by customers and employees, and prioritizing integration with existing tech infrastructure are considered key tactics for achieving quick wins according to global tech leaders (40% and 39% respectively). Similarly in the UAE, there is a strong emphasis on systems that integrate with the organization's existing infrastructure (40%), alongside frequent data-centric evaluation to optimize implementation (40%).

To track the value of their digital transformation projects and tech investments, global organizations focus on strategic evaluation of their tech investment portfolio to align with long-term goals (42%), as well as regularly reviewing their value-tracking metrics to keep up with market changes (40%). 39% of UAE organizations also perform regular metric updates, with a strong reliance on real-time data insight to guide their decision making. There is notable attention to stopping underperforming projects (36%) and incorporating user feedback (34%) in the UAE, indicating a robust approach to value tracking.

What strategies does your organization use to track the value of your digital transformation projects and your tech investments?



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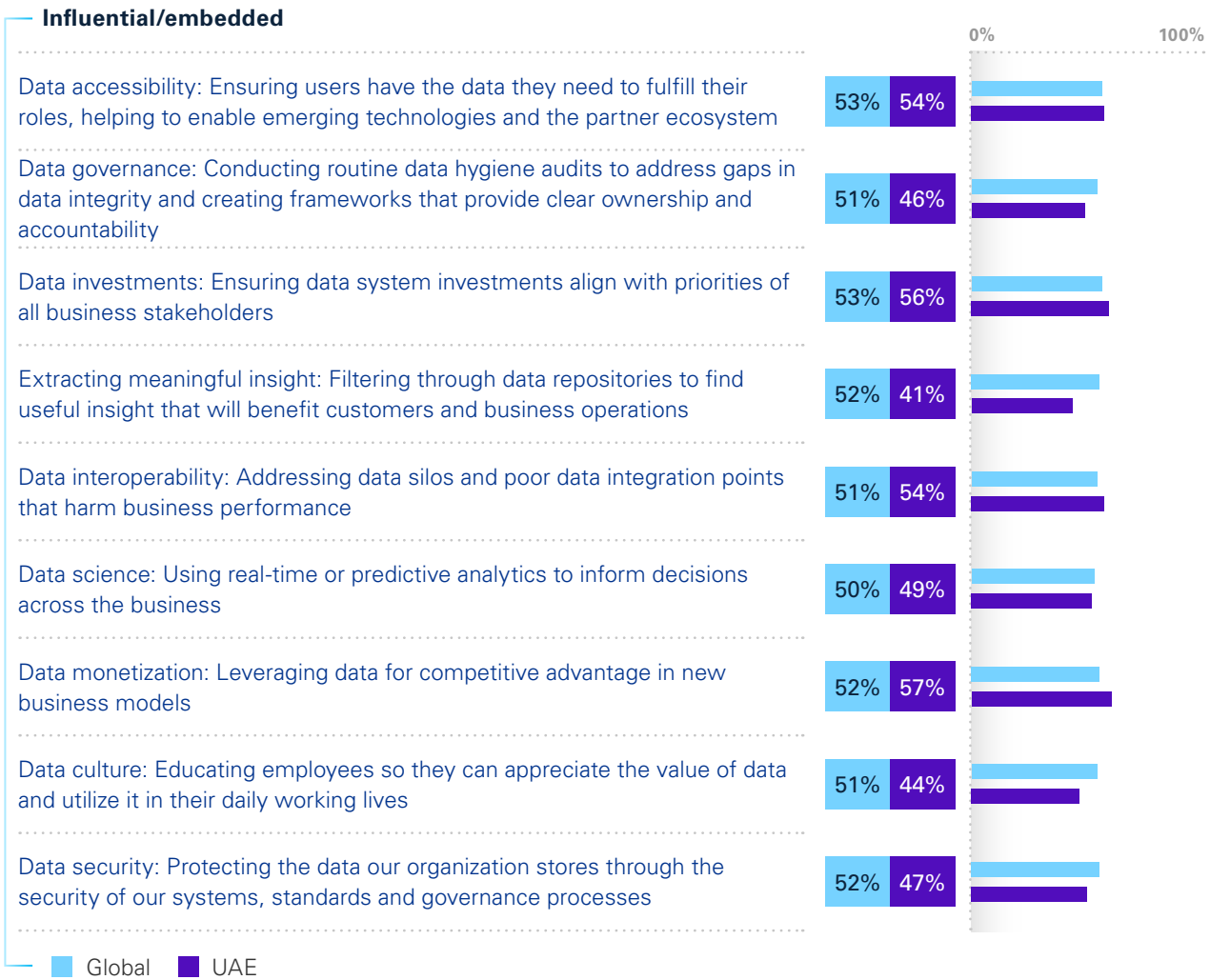
How effective are your data and analytics activities in the following areas?



Global and UAE tech leaders assess data and analytics effectiveness across key areas. Data monetization for competitive advantage in new business models is effective for 52% globally and 57% in the UAE. Tech leaders globally (53%) and in the UAE (56%) also find it impactful to align data investments with priorities of all business stakeholders. Ensuring data accessibility and interoperability, including data silos and poor data integration points, are considered beneficial by 54% of local tech leaders.

32% of global leaders and 33% in the UAE integrate data monetization into their strategy through well-defined processes. As for data security, 30% globally and 20% say this is a fundamental part of their business strategy, with structured yet agile guidelines noted by 23% globally and 27% in the UAE, reflecting a balance between security and agility.

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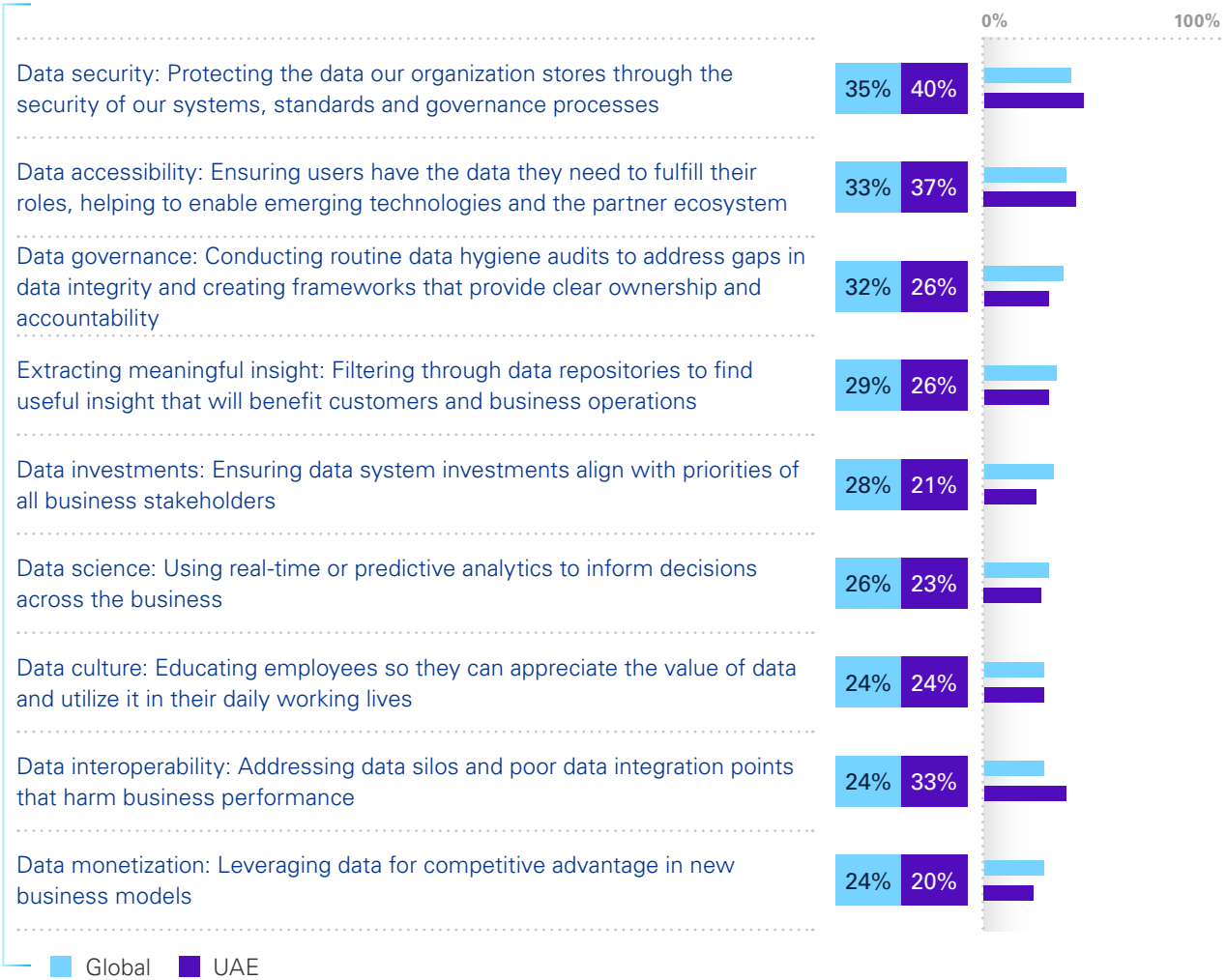
What data management areas will your organization focus on improving in the next 12 months?



Global and UAE tech leaders are prioritizing the improvement of various data management areas over the next 12 months. Data security is a key focus, with 40% of respondents in the UAE and 35% globally emphasizing the protection of their organizations' stored data through secure systems, standards and governance processes. Data accessibility and democratization follow at 37% in the UAE and 33% globally, ensuring users have the necessary data for their roles and enabling emerging technologies. Addressing data interoperability to reduce silos is also an important goal for organizations both in the UAE (33%) and globally (24%).

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What key benefits has your organization achieved from leveraging public cloud platforms/XaaS technologies over the past 12 months?

Tech leaders worldwide, including the UAE, recognize the positive impact of cloud platforms and XaaS on their organizations. A significant portion (38% in the UAE and 37% globally) report enhanced data management and integration as a significant advantage, followed by the reduction of technology debt at 36% and 30% respectively. In the UAE, 32% also acknowledge improvements in security and compliance, with 36% achieving similar benefits globally.

In terms of ESG objectives, 33% globally and 29% in the UAE believe that public cloud platforms/XaaS technologies contribute to sustainability by helping businesses reduce their carbon footprint.

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04

Challenges in data management and the role of cloud platforms

Which of the following challenges are most likely to slow down your transformation?

Both global and UAE tech leaders report facing several challenges in digital transformation. Immature data management strategies affect 13% of organizations in the UAE and 11% globally. And while the inability to agree on priorities or get stakeholder buy-in is a concern for 11% globally, UAE tech leaders (14%) are more focused on transformation fatigue and compliance issues. Only 4% however are facing skills shortages in the UAE, while 10% of global respondents express this is slowing down their organizations' transformation efforts.

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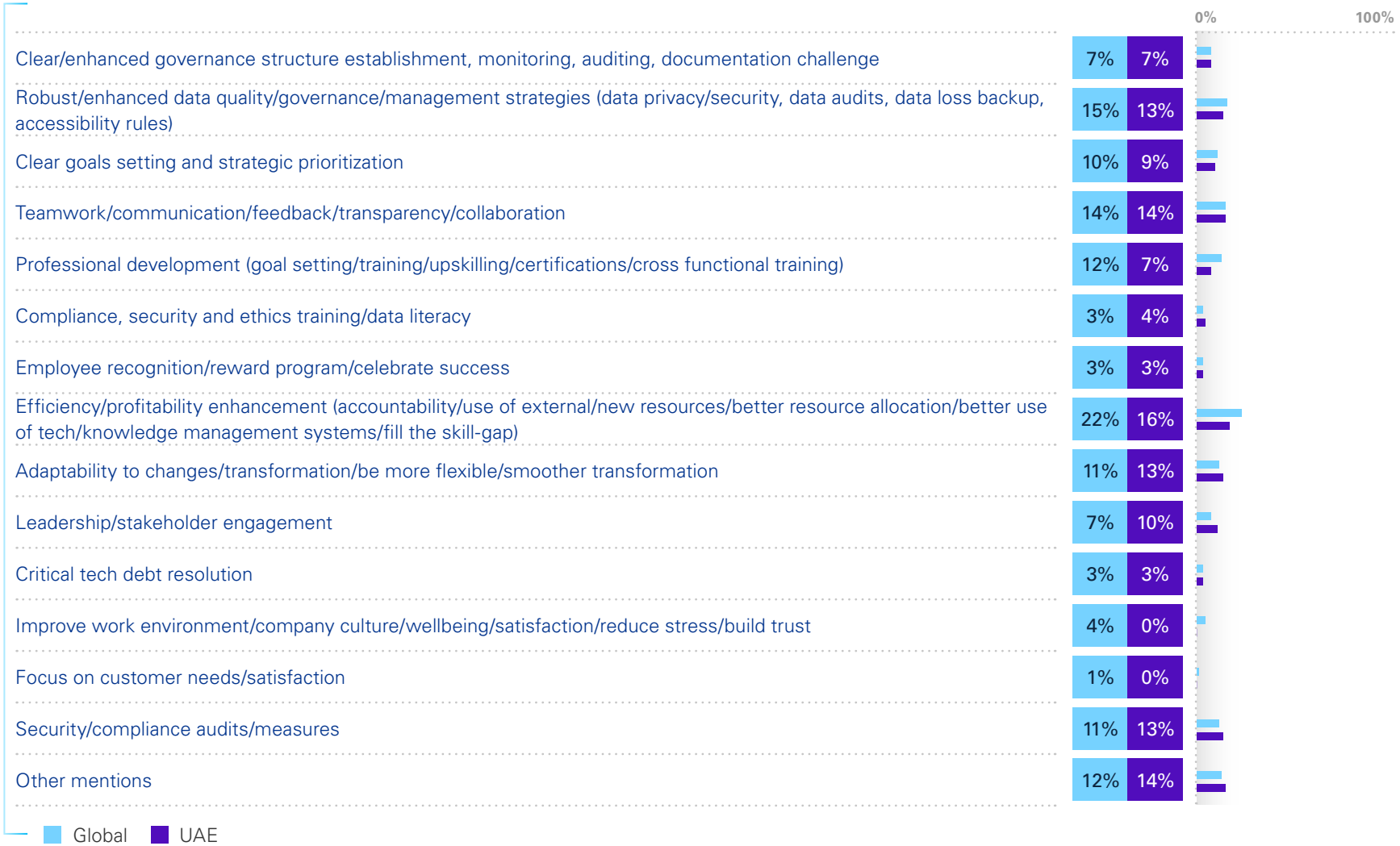
What success factor would most help your business overcome your greatest challenge?



Addressing these challenges requires specific success factors. Enhancing efficiency and profitability through better resource allocation and filling the skill-gap is ranked first, at 22% globally and 16% in the UAE. Robust data quality, governance and management strategies stand out at 15% globally and 13% in the UAE. Both global and local leaders equally agree (14%) that efficient teamwork, communication, feedback, transparency and collaboration are crucial in overcoming transformation challenges. Security and compliance measures and adaptability to change are also highlighted as key enablers by 13% of UAE respondents.

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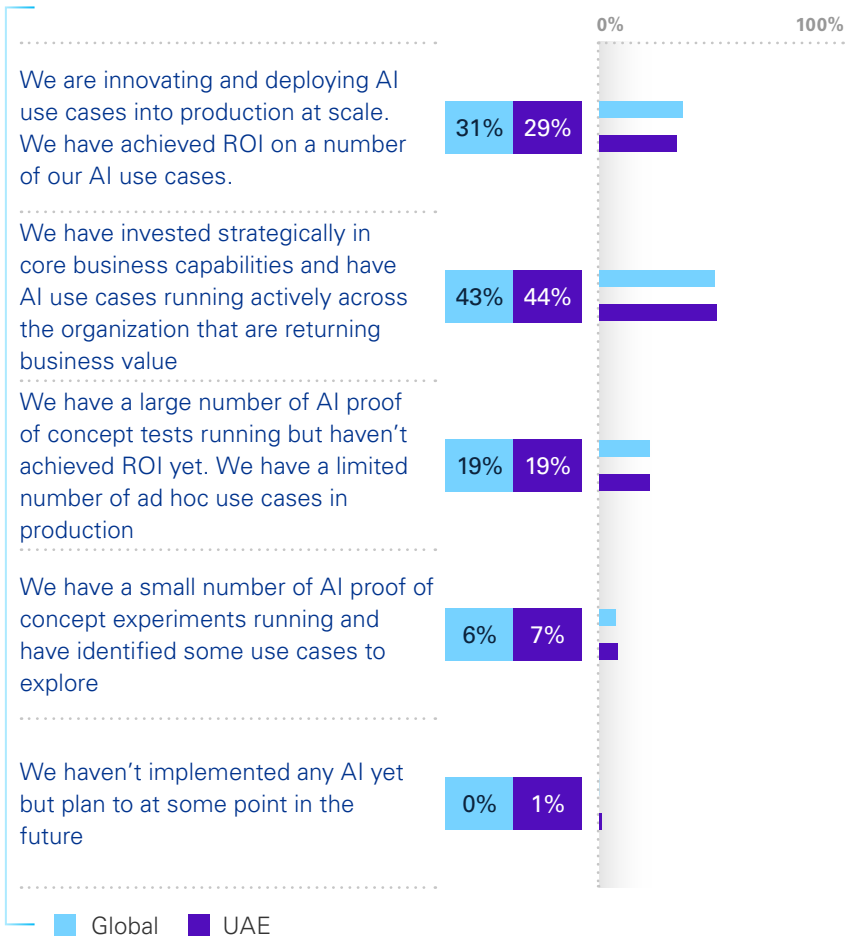
Which of the following tactics do you use to adapt your digital transformation strategy in response to evolving market trends and risks?

Globally, 45% of tech leaders prioritize data-centric decision-making to adapt their digital transformation strategy in response to evolving market trends and risks, while 43% focus on scenario forecasts and risk workshops. In the UAE, 44% emphasize routine supplier risk assessments and 'red-teaming' exercises to verify AI responsibility and guardrails, compared to 41% and 39% globally.

Which of the following best describe your organization's current maturity level with AI adoption?



In the UAE, 29% of organizations are deploying AI use cases into production at scale and have achieved ROI, while 44% have strategically invested in AI with operational use cases generating business value. Another 19% are running numerous AI proof-of-concept tests without ROI, with 7% still exploring some AI use cases. Only 1% have not yet implemented this technology but plan to in the future.

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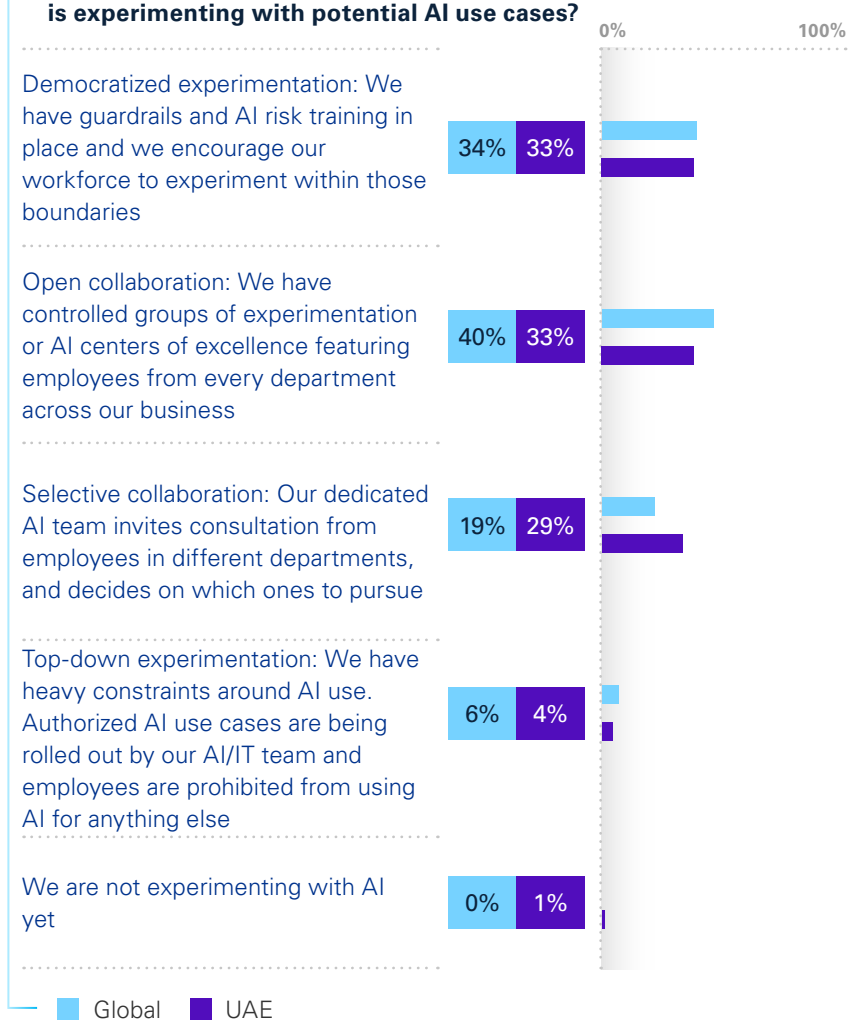
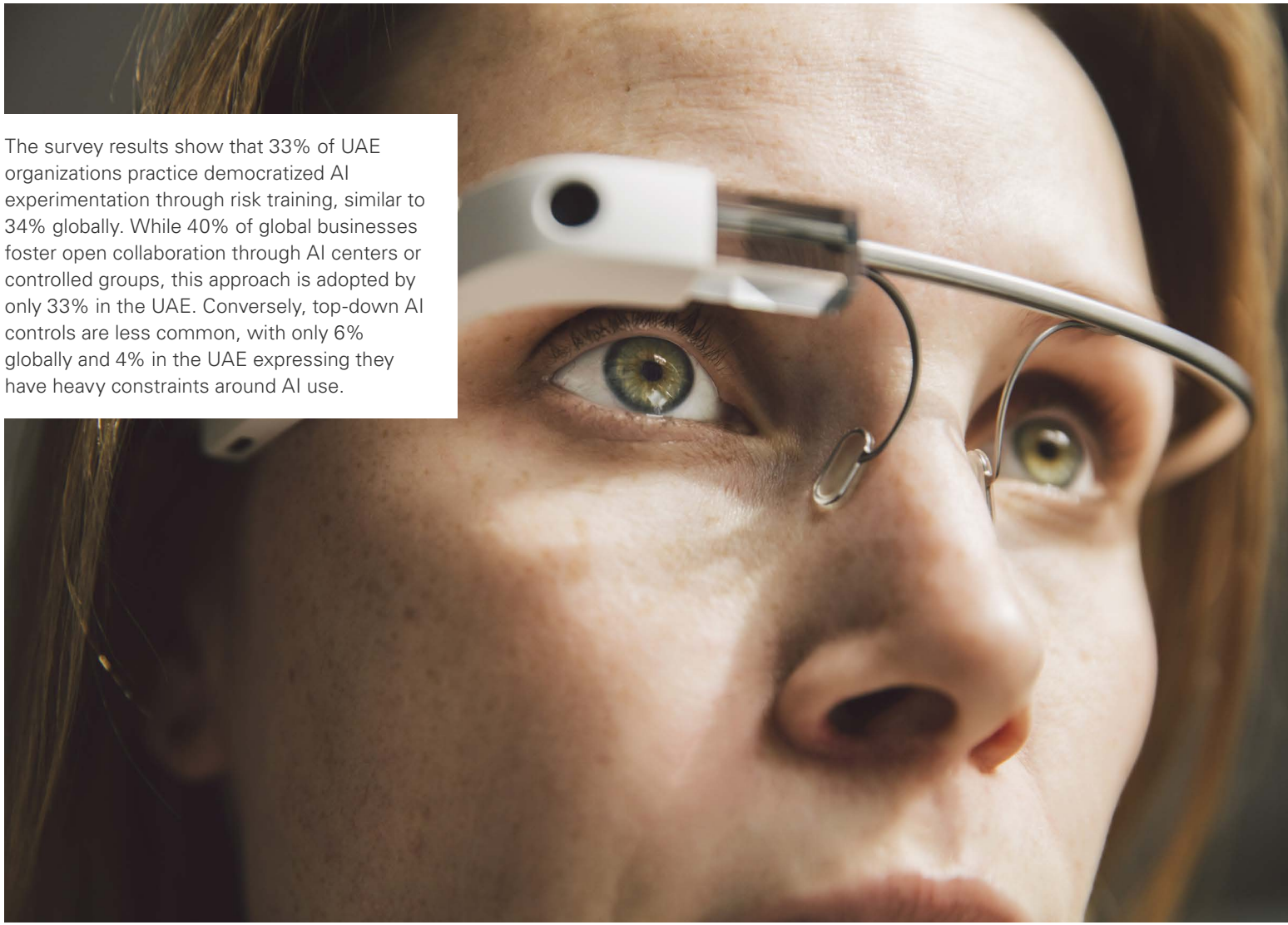
Which of the following best describe how your company is experimenting with potential AI use cases?



The survey results show that 33% of UAE organizations practice democratized AI experimentation through risk training, similar to 34% globally. While 40% of global businesses foster open collaboration through AI centers or controlled groups, this approach is adopted by only 33% in the UAE. Conversely, top-down AI controls are less common, with only 6% globally and 4% in the UAE expressing they have heavy constraints around AI use.



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To what extent do you agree or disagree with the following statements in light of how AI is impacting your workforce?

In the UAE, 70% agree that AI fills skill gaps among knowledge workers that had previously been a major challenge for their organizations. Notably, 77% see significant evolution in their roles as tech leaders over the last two years and expect the pace of change to accelerate, and 70% express concerns about productivity bottlenecks due to AI management limitations. In an ever-changing tech landscape, 59% of UAE respondents feel some employees are left behind and another 59% believe employees with the most AI knowledge (super users) are being dispersed into different business departments. Our survey found that these local sentiments strongly align with global leaders', at 66% and 69% respectively. Like 74% of leaders worldwide, 72% of respondents in the UAE consider themselves risk guardians in terms of how their organizations leverage AI.

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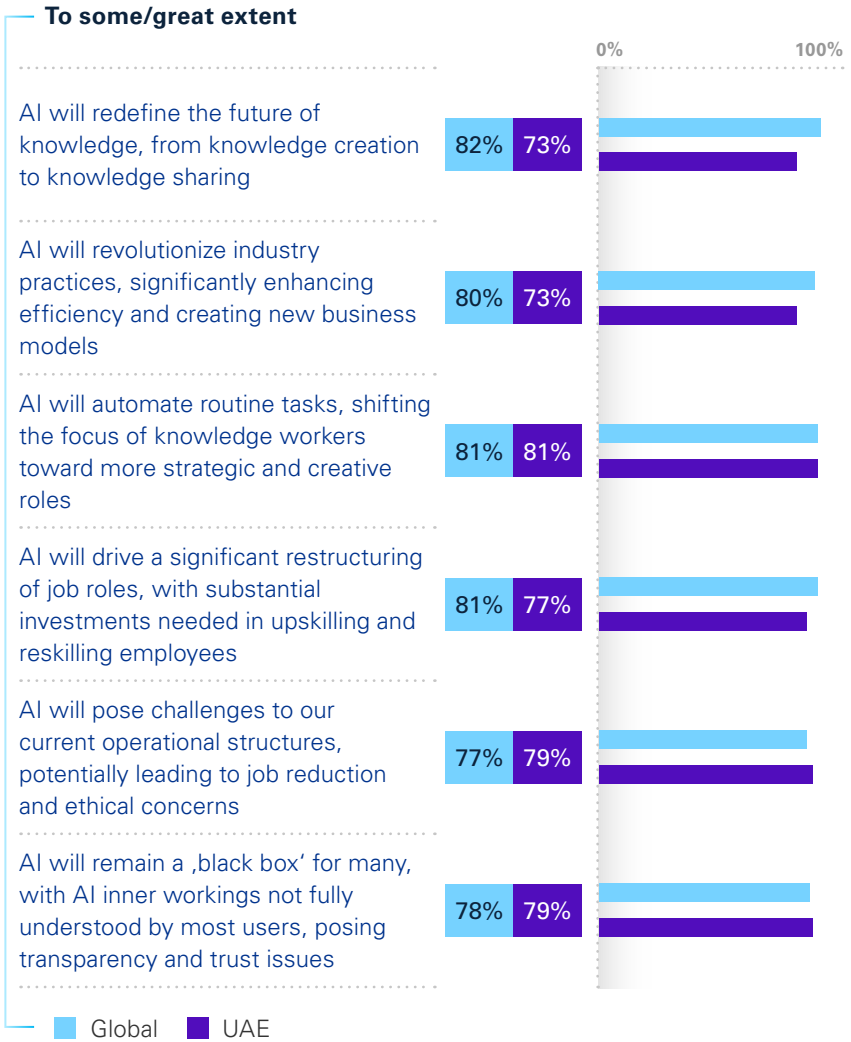
To what extent, if at all, do you anticipate AI disrupting the roles of knowledge workers and the broader landscape of your industry over the next ten years?



Over the next decade, 82% of tech leaders globally foresee AI transforming knowledge creation and sharing. In the UAE, this expectation is slightly lower at 73%. Similarly, 80% of global leaders anticipate AI revolutionizing industry practices, compared to 73% in the UAE. When it comes to job restructuring, 81% of leaders in the UAE and worldwide believe AI will automate routine tasks, with 77% in the UAE foreseeing a shift of knowledge workers toward more strategic and creative roles. Concerns about AI's impact are also prevalent, with 77% globally worried about operational disruptions and ethical issues, closely mirrored by 79% in the UAE, who share similar concerns about transparency and trust. These findings indicate that while global leaders are more focused on the broader transformational impact of AI on knowledge creation and industry practices, UAE leaders are particularly aware of the operational and workforce shifts that AI will drive, highlighting a more immediate focus on practical implementation and transparency issues.

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For more than 50 years, KPMG Lower Gulf Limited has been providing audit, tax and advisory services to a broad range of domestic and international, public and private sector clients across all major aspects of business and the economy in the United Arab Emirates and in the Sultanate of Oman.

KPMG Lower Gulf is part of KPMG International Cooperative's global network of professional member firms. KPMG firms operate in 143 countries and territories. Established in 1973, KPMG in the UAE and Oman is well connected with its global member network and combines its local knowledge with international expertise.

We are committed to quality and service excellence in all that we do, helping to bring our best to clients and earning the public's trust through our actions and behaviors both professionally and personally.

Our Values guide our behavior day-to-day, informing how we act, the decisions we make, and how we work with each other, our clients, and all of our stakeholders.

They are

Integrity:
We do what is right

Excellence:
We never stop learning and improving

Courage:
We think and act boldly

Together:
We respect each other and draw strength from our differences

For Better:
We do what matters.

To meet the changing needs of our clients, we have adopted an approach aligned with our global purpose: Inspiring Confidence, Empowering Change.

At KPMG Lower Gulf, we believe that ESG is core to sustainable growth. KPMG's Global ESG Plan details its commitments across four ESG categories: planet, people, prosperity, and governance. These four priority areas assist us in defining and managing our environmental, social, economic and governance impacts to create a more sustainable future. We aim to deliver growth with purpose. We unite the best of KPMG to help our clients fulfil their purpose and deliver against the SDGs, so all our communities can thrive and prosper.

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