

strategy&

Part of the PwC network

Pragmatic AI sovereignty

**Architecting AI value
chains for control and
continuity in the Gulf
countries**



Contacts

Riyadh

Chady Smayra
Partner
+966-50-594-1081
chady.smayra
@strategyand.pwc.com

Dubai

Ramzi Khoury
Partner
+971-56-244-9383
ramzi.khoury
@strategyand.pwc.com

Sreedhar Gopalakrishnan Nair
Principal
+971-54-995-6372
sreedhar.gopalakrishnan.nair
@strategyand.pwc.com

About the authors

Chady Smayra is a partner with Strategy& Middle East, part of the PwC network, in the technology, media, telecommunications and digital practice. Based in Riyadh, he has more than 25 years of experience in information and communications technology (ICT), focused on the telecom and technology sectors. He specializes in growth strategy, digital transformation, technology ventures, digital business models, AI and digital infrastructure, mergers and acquisitions and performance turnaround programs.

Ramzi Khoury is a partner with Strategy& Middle East in the technology, media, telecommunications and digital practice. Based in Dubai, he has more than 20 years of experience in telecommunications, technology, digital transformation and AI. He specializes in strategy, growth, operating model transformation, commercial acceleration and strategic partnerships, helping national ICT champions and government entities build mission-critical ICT capabilities and strengthen digital resilience and sovereignty across sectors including defense, national security, public safety and critical infrastructure.

Sreedhar Nair is a principal with Strategy& Middle East in the technology, media, telecommunications and digital practice. Based in Dubai, he has 15 years of industry and consulting experience, acquired through various engagements in the Middle East, Africa and India. He specializes in strategy, growth, inorganic expansion, operating model transformation and commercial innovation for ICT sector players, as well as advising policymakers and regulators on sector strategy development.

We thank Shahmeer Naeem, a senior associate with Strategy& Middle East, for his contributions to this Viewpoint.

EXECUTIVE SUMMARY

Often, the quest to achieve leadership in the global competition that has arisen around artificial intelligence (AI) is reduced to seeking access to chips. But chips are only one component of the AI value chain. To attain a leadership position in AI, countries in the Gulf Cooperation Council (GCC) and beyond must adopt a more nuanced approach that encompasses the entire AI value chain, including chips, compute infrastructure, cloud platforms, models, data and other elements.

We call this *pragmatic AI sovereignty*. It seeks to balance the need for control over the AI value chain with the need for continuous access to its components. In doing so, pragmatic AI sovereignty mitigates the risks of both external dependence and internal fragility.

There is no single way to achieve pragmatic AI sovereignty. Government leaders and other stakeholders must consider each aspect of the value chain in terms of its concentration, capital intensity, strategic sensitivity and value creation potential.

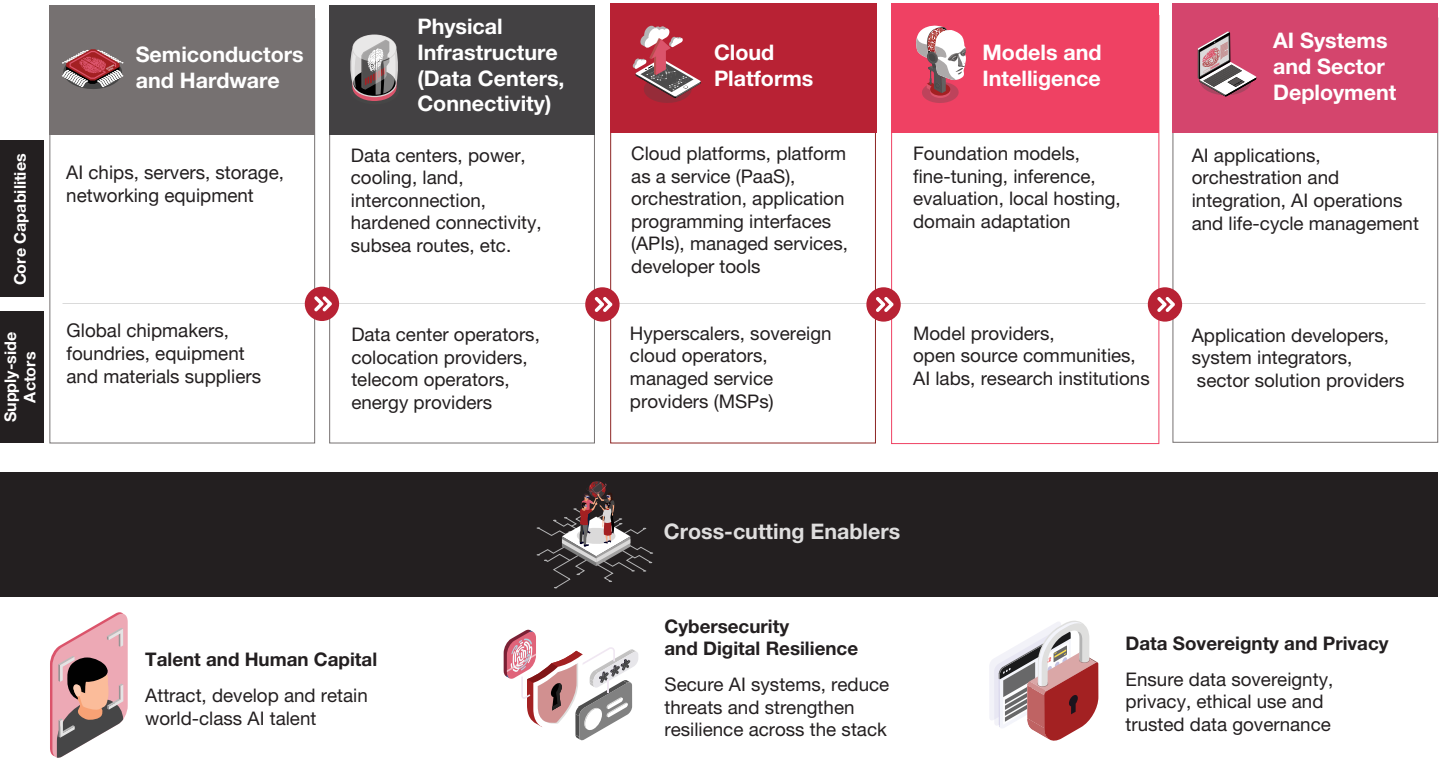
Then, leaders can determine which posture or combination of postures can be used to secure access to the layers of value. There are four postures they can use: *assure*, which secures a layer via agreements, allocation, diversification or contractual safeguards; *control*, which secures a layer by owning, operating or governing it; *partner*, which secures a layer via partnership with a global player while maintaining local governance, localization, resilience and exit rights; and *influence*, which secures a layer using capital, regulation, procurement or market access to shape its standards, capital flows, supplier priorities or policy dialogues.

The GCC countries are well positioned to not only secure their own pragmatic AI sovereignty, but also shape how AI ecosystems evolve across adjacent markets. To succeed and lead in the AI era, they will secure access where it matters, assert control where it is critical and build leadership where value can be captured.

THE PRAGMATIC SOVEREIGNTY IMPERATIVE IN AI

Artificial intelligence (AI) has become a global competition. Countries in the Gulf Cooperation Council (GCC) and beyond are vying for leadership positions in the race to put AI to work.¹ More critically, they are competing to secure access to the AI value chain – the chips, compute infrastructure, cloud platforms, models, data and other elements that constitute this powerful new technology – and to its three major enablers: talent and human capital, cybersecurity and digital resilience and digital resilience and data sovereignty and privacy (see *Exhibit 1*).

EXHIBIT 1
AI leadership depends on access to each layer of AI value

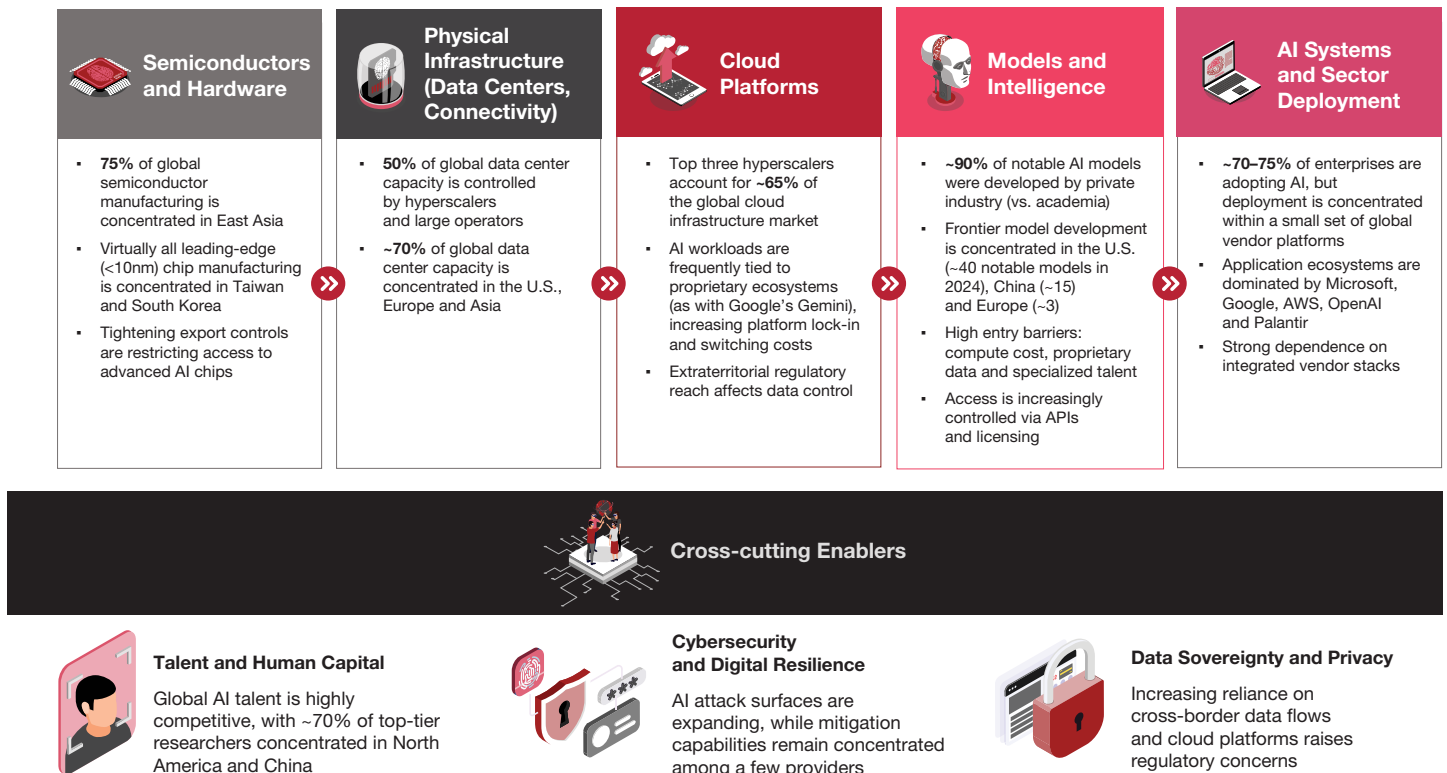


Source: Strategy&

This is a challenging endeavor for the GCC countries, because the AI value chain is rife with chokepoints. Among them: Advanced semiconductor manufacturing is concentrated in a handful of companies; the public cloud is dominated by a few hyperscalers; the development of leading-edge models is dominated by a small number of corporate labs, all of them based outside the Gulf region; and access to talent is constrained by global competition and regional tensions (see *Exhibit 2*).²

EXHIBIT 2

AI value chain chokepoints in the GCC countries



Source: See endnote 2, page 15

Countries whose access to AI could be cut off at these chokepoints are exposed to significant economic risk. In February 2026, the secretary general of the GCC announced that AI was expected to add US\$260 billion to the regional economy by 2030.³ If the GCC countries cannot exert greater control across critical components in the AI value chain, however, this economic upside is at risk, and they will experience long-term leakage of economic value to external chip providers, hyperscalers, model developers and platform owners.

AI chokepoints also raise the specter of strategic risk. The GCC countries could face geopolitical risk stemming from controls on chips, models and the cloud imposed by external governments. They may also be exposed to jurisdictional risks due to external access to sensitive data and critical systems, as well as ever-changing rules and regulations.

The promise and peril inherent to AI are why AI sovereignty has already risen to a national imperative in the GCC countries. In pursuing AI sovereignty, governments seek to establish localized control over critical AI capabilities.

The problem with this singular focus is that unbridled sovereign control has its own downside. Taken too far, localized systems can become fragile. During the recent Middle East conflict, cloud infrastructure in the UAE and Bahrain was affected, underscoring the importance of resilience and continuity planning.⁴

What's needed is a more nuanced approach to the AI value chain – one that mitigates the risks of both external dependence and internal fragility. Such an approach strikes a balance between the need for control of the AI value chain and the need for continuous access to it. The result is pragmatic sovereignty.

Pragmatic AI sovereignty is the ability of a government to retain strategic control over critical AI capabilities while ensuring the continuity of AI's value chain under disruption.



BEYOND GPU NATIONALISM

Too often, the quest for AI sovereignty is reduced to graphics processing unit (GPU) nationalism – that is, the question of who controls the chips. Pragmatic sovereignty is far more comprehensive: It considers and spans the entire AI value chain, from semiconductors and infrastructure to cloud platforms, models and applications, as well as the three value chain enablers (talent and human capital, cybersecurity and digital resilience and data sovereignty and privacy).

For the GCC countries, the quest for pragmatic AI sovereignty cannot be achieved using one method and applying it uniformly across the value chain. This is because the layers of value vary significantly in terms of concentration, capital intensity, strategic sensitivity and value creation potential for each country.

A more nuanced and flexible approach to pragmatic sovereignty is required. In this approach, GCC governments make deliberate, layer-specific choices. The underlying rationale for these choices depends on which of four postures can offer the most effective way for a country to ensure access, control, resilience and value capture across the AI value chain. The four postures are detailed below.

- **Assure:** This posture secures a value layer via agreements, allocation, diversification or contractual safeguards. Typically, it is most effective for globally concentrated AI capabilities, such as advanced chips, critical hardware and frontier models. For instance, the UAE has secured GPU allocations as part of the U.S.–UAE AI Acceleration Partnership.⁵
- **Control:** This posture secures a value layer by owning, operating or governing it through government entities or national champions. This posture is typically most effective in such areas as critical data, digital identity, sensitive workloads, national platforms and AI use cases in sectors involving vital national infrastructure. India, for example, developed and governs Aadhaar, one of the world's largest digital identity platforms, to retain sovereign control over critical identity data.⁶
- **Partner:** This posture secures a value layer via partnership with a global player, while maintaining local governance, localization, resilience and exit rights. Typically, it works well for layers that involve cloud platforms, foundation models and advanced AI services. France, for instance, established Bleu, a sovereign cloud platform that combines Microsoft Azure technology with French operational control and governance.⁷

- **Influence:** This posture secures a value layer using capital, regulation, procurement or market access to shape the layer's standards, capital flows, supplier priorities or policy dialogues. This posture is typically effective for chips, standards, model providers and platform road maps. For instance, the European Union's Artificial Intelligence Act uses regulation and market access to influence how global AI providers design, deploy and govern AI systems within the European market.⁸

As a government chooses to use one or more of the four postures for managing each of the AI value layers, the most effective means for achieving pragmatic AI sovereignty starts to become clear.



To use the four postures to secure access to the individual components of the AI value chain, governments need to translate them into specific actions. These actions will vary with the conditions in the country, but they can be defined in broad terms for each of the AI value chain layers and ranked according to their efficacy.

BUILDING PRAGMATIC AI SOVEREIGNTY

To use the postures to secure access to the individual components of the AI value chain, governments need to translate them into specific actions. These actions will vary with the conditions in the country, but they can be defined in broad terms for each of the AI value layers and ranked according to their efficacy (see *Exhibit 3*).

EXHIBIT 3

Ways and means for building pragmatic AI sovereignty in the GCC countries

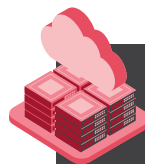
AI Value Layer	Assure	Control	Partner	Influence
 Semiconductors and Hardware	Secure long-term access through supply diversification, allocation commitments and government-to-government channels	Refrain from full upstream self-sufficiency, as leading-edge chip manufacturing is too concentrated, capital-intensive and ecosystem-dependent	Focus partnerships on adjacent capabilities (for example, advanced packaging and testing)	Use sovereign capital and strategic relationships to shape supplier priorities
 Physical Infrastructure (Data Centers, Connectivity)	Not applicable, as the objective is not external access assurance but domestic buildout	Own and operate in-country data centers, power, cooling, interconnection, hardened sites and distributed edge infrastructure through national players	Build and operate infrastructure with global data centers and cloud partners under sovereign operating models	Shape regional connectivity, submarine cable routes, power markets and global data center failovers (supported by cross-border frameworks)
 Cloud Platforms	Not applicable, as cloud sovereignty primarily concerns governable platforms	Refrain from competing with hyperscalers across the full platform stack; their scale, economics, service breadth and innovation cycle are difficult to replicate	Codevelop sovereign cloud capabilities with hyperscalers and local providers, while localizing operations, support, compliance and platform know-how	Shape cloud policy, sovereign cloud standards, data residency norms, interoperability and hyperscaler regional commitments
 Models and Intelligence	Understand that licensed model access (while necessary) is insufficient for long-term model sovereignty	Build local capability in fine-tuning, evaluation, Arabic adaptation, inference and sector-specific models	Codevelop models and adaptation capabilities with global labs, open source communities, universities and national champions	Contribute to benchmarks, Arabic data sets, safety standards, open source communities and model governance dialogues
 AI Systems and Sector Deployment	Refrain from depending on vendor solutions as the default model; use them selectively with fallback options	Build and operate critical AI systems for government and strategic sectors in-country	Codevelop sector solutions with partners while localizing deployment, integration and operations	Shape procurement standards, certification regimes and sector regulations

 HIGH APPLICABILITY Highly relevant and a core strategic priority	 MEDIUM APPLICABILITY Relevant but not sufficient on its own	 LOW APPLICABILITY Limited relevance / not a viable strategic priority	 NOT APPLICABLE Not a constraint or not relevant at this stage
--	---	--	--

Source: Strategy&

- **Value layer: Semiconductors and hardware**

In the GCC countries, the most effective means of assuring secure access to advanced chips and critical hardware is through diversified supply relationships, long-term allocation arrangements and coordinated demand (for example, national demand aggregation platforms). Governments can support this quest in several ways: aggregating demand to secure allocations; using sovereign wealth fund capital to secure influence; leveraging structural advantages, such as energy, capital and geography, to attract AI training and inference workloads; and forming partnerships to deepen ecosystem relevance (see *Idea Spotlight #1*).⁹



IDEA SPOTLIGHT #1

National AI Exchange

Aggregate national demand for AI, procure AI infrastructure at scale and distribute AI through a shared cloud platform, ensuring priority access for government, startups, researchers and strategic sectors

Example:

Singapore's National Supercomputing Centre provides shared access to advanced compute infrastructure across research, industry and government users

- **Value layer: Physical infrastructure (data centers, connectivity)**

The most effective means of obtaining the physical infrastructure needed for AI in the GCC countries is to build and govern critical infrastructure and design redundancy across compliant locations. Toward this end, governments can provide national champions with the mandates to scale AI-ready infrastructure capable of supporting strategic national workloads (see *Idea Spotlight #2*).¹⁰

Compliance-led resilience should be designed into data infrastructure: It should feature infrastructure hardening, in-country failover by default and regional or global redundancy (where regulations permit and when supported by updated cross-border data controls). Power and cooling infrastructure should secure long-term capacity needed by AI and should include grid resilience, backup generation and priority energy allocation. Distributed edge compute infrastructure should be built to enable local inference capability for latency-sensitive and mission-critical workloads. Connectivity resilience should be strengthened by using protected links between sovereign compute zones, cloud regions and critical sector networks; diversified terrestrial and subsea routes; and carrier redundancy.



IDEA SPOTLIGHT #2

Hardened Sovereign Nodes

Establish physically hardened data center sites for crown-jewel workloads, leveraging underground facilities, bunkers and naturally fortified environments (for example, mountain ranges)

Example:

Sweden repurposed a former Cold War nuclear bunker into Pionen, a physically hardened underground data center

- **Value layer: Cloud platforms**

To secure access to cloud platforms, GCC countries can begin by structuring partnerships on sovereign terms, with clear requirements related to residency, audit and governance for sensitive workloads. They should also build governed landing zones for critical workloads, with approved services, guardrails, access controls and compliance-by-design.

To avoid becoming overly reliant on one platform, governments should pursue a multi-cloud strategy, designing for portability across hyperscalers, local regions and private environments, with fallback and exit options (see *Idea Spotlight #3*).¹¹ They also should build domestic platform capability across cloud engineering, machine learning operations (MLOps), security operations (SecOps), financial operations (FinOps), governance and monitoring.



IDEA SPOTLIGHT #3

Federated Cloud Framework

Create nationally certified cloud environments that allow sensitive workloads to move seamlessly across approved providers while preserving security, compliance and operational continuity

Example:

Gaia-X (Europe) aims to create interoperable cloud environments that allow organizations to move workloads across trusted providers

- **Value layer: Models and intelligence**

To achieve pragmatic sovereignty in this layer, the GCC countries can take a measured approach to developing frontier models, while investing assertively in sovereign hosting, Arabic adaptation and sector-specific models where the region can lead (for example, energy and logistics), as well as evaluation, safe deployment and fallback optionality. Where it is commercially and geopolitically feasible, they can host globally recognized foundation models locally through strategic hosting agreements with major model providers, such as OpenAI, Anthropic and Google DeepMind.

Governments should also develop long-term model resilience strategies through fallback models and continuity plans, in case provider access, licensing or terms change (see *Idea Spotlight #4*).



IDEA SPOTLIGHT #4

National Model Escrow

Require the critical AI models used in government and strategic sectors to be subject to sovereign escrow arrangements, ensuring continuity if providers withdraw support or if access changes

Example:

Source-code escrow arrangements are commonly used to ensure continued access to essential software if vendors cannot fulfill their contracts

They can build a strong local capability for adaptation, including fine-tuning, inference, evaluation, Arabic-first development and sector-specific models for priority domains. Finally, they can nurture the development of a sustained model ecosystem through research partnerships, local talent and selective attraction of global labs or think tanks to deepen domestic capabilities.

- **Value layer: AI systems and sector deployment**

Systems and sectors represent the layer at which GCC countries can make the shift from being AI consumers to being AI producers by converting domestic deployments into commercially viable solutions, managed services and sector platforms. To achieve pragmatic sovereignty in this layer, GCC countries can use government and state-owned enterprise (SOE) demand to scale priority AI solutions, create reference deployments and convert proven capabilities into exportable offerings.

The GCC countries can create national AI champions or mandate that existing players design, integrate and operate AI systems in critical domestic environments and scale sector-specific AI solutions in government, energy, finance, health, logistics and defense. They can also define sector-specific AI deployment standards and enforce compliance, audit and accountability.



To make sure that the talent needs of AI are met, GCC governments must identify any critical talent gaps in the AI value chain and prioritize those gaps that will require in-country capability. To fill talent gaps, governments can launch and support apprenticeship and residency programs that combine intensive technical training and deployment on national AI projects.

MAKING SURE THAT THE ENABLERS OF THE AI VALUE CHAIN ARE IN PLACE

Achieving pragmatic AI sovereignty requires securing access to the three essential enablers that cut across the AI value chain: talent and human capital; cybersecurity and digital resilience; and data sovereignty and privacy.

- **Value chain enabler: Talent and human capital**

To make sure that the talent needs of AI are met, GCC governments must identify any critical talent gaps in the AI value chain and prioritize those gaps that will require in-country capability. To fill talent gaps, governments can launch and support apprenticeship and residency programs that combine intensive technical training and deployment on national AI projects (see *Idea Spotlight #5*).¹² They can sponsor structured secondments, rotations and paid placements within leading AI labs, hyperscalers and technology firms and tie them to mandatory knowledge transfer and return-to-country programs. Further, they can seek to attract scarce global expertise through targeted visas and specialist pathways that are structured around capability transfer and mentorship, rather than long-term dependency.



IDEA SPOTLIGHT #5

National AI Apprenticeship Program

Rapidly build sovereign AI capability by embedding talent into real-world projects using intensive apprenticeship and mentorship models that combine technical training with hands-on experience on national priorities

Example:

Singapore's AI Apprenticeship Programme (AIAP) is a nine-month government-backed initiative that embeds engineers in AI projects under industry mentorship, rapidly building deployment-ready AI talent

- **Value chain enabler: Cybersecurity and digital resilience**

To ensure cybersecurity, GCC governments can build upon their current efforts by establishing national AI assurance authorities that are charged with developing compliance frameworks and driving the certification, audit and compliance of AI systems. These authorities can build national AI testing and validation labs to ensure end-to-end system integrity, including hardware, applications, models and supply chain assurance (see *Idea Spotlight #6*).¹³ Governments can also establish the national AI monitoring and incident response capabilities needed to ensure real-time detection, coordinated response, failover continuity, system isolation and rapid recovery from cyber threats.



IDEA SPOTLIGHT #6

National AI Assurance Labs

Establish dedicated national facilities to test, certify and monitor AI systems, models and hardware before deployment in critical sectors

Example:

The U.K. established the AI Security Institute to evaluate frontier AI models, conduct safety testing and develop assurance frameworks for high-impact AI systems

- **Value chain enabler: Data sovereignty and privacy**

To fully protect data, GCC governments should ring-fence and retain sovereign control over critical national data sets (defense, energy, health, finance, digital ID), with full control over storage, processing and access control. They should develop the national data governance frameworks and capabilities needed to ensure the integrity, quality and traceability of data sets used in AI systems, including standards for validated and trusted training data.

Further, governments can enable controlled and secure data sharing frameworks to support innovation while preserving sovereignty and privacy. They can also develop sovereign data embassy frameworks with trusted jurisdictions and ensure the continuity of critical national data and systems through resilient offshore environments governed under sovereign controls (see *Idea Spotlight #7*).¹⁴



IDEA SPOTLIGHT #7

Sovereign Data Embassy

Establish sovereign-governed digital continuity environments in trusted partner jurisdictions to ensure the resilience of critical national data and AI systems under geopolitical, cyber or physical disruption

Example:

Estonia established one of the world's first sovereign digital embassies in Luxembourg to ensure continuity of critical government systems under disruption

CONCLUSION

Formulating a plan capable of achieving pragmatic AI sovereignty is an important starting point for GCC governments. The greater challenge lies in execution.

To achieve pragmatic AI sovereignty, stakeholders must be aligned in pursuit of a coherent AI agenda. Governments will need to set the rules and aggregate demand. Sovereign wealth funds will need to secure access and wield influence. National champions will need to build and operate critical infrastructure. Government entities and national champions will have to create data and use cases, too.

To meet this challenge, GCC governments must forge robust strategic technology partnerships; empower national champions; wield sovereign capital to secure access and influence; and build and nurture local AI production and deployment ecosystems. Moreover, they will need to recognize that pragmatic AI sovereignty is not a one-and-done effort. It is going to be a continual exercise in managing dependency, control and influence in an increasingly contested technological landscape.

For GCC countries, the AI opportunity is significant. Given their capital strength, strategic geography and growing digital ambition, they are well positioned to not only secure their own pragmatic sovereignty, but also shape how AI ecosystems evolve across adjacent markets. The GCC countries that succeed and lead in the AI era will not be those that attempt to own the entire AI value chain. The leaders will be those that secure access where it matters, assert control where it is critical and build leadership where value can be captured.

ENDNOTES

1. The GCC countries are Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates.
2. Data sources for Exhibit 2: “Strengthening the Global Semiconductor Supply Chain in an Uncertain Era,” Semiconductor Industry Association, 2021 (<https://www.semiconductors.org/strengthening-the-global-semiconductor-supply-chain-in-an-uncertain-era/>); “EUV Lithography Systems,” ASML.com (<https://www.asml.com/en/products/euv-lithography-systems>); “Hyperscale Operators and Colocation Continue to Drive Huge Changes in Data Center Capacity Trends,” Synergy Research Group, August 7, 2024 (<https://www.srgresearch.com/articles/hyperscale-operators-and-colocation-continue-to-drive-huge-changes-in-data-center-capacity-trends>); “Hyperscale Data Center Count Hits 1,136; Average Size Increases; US Accounts for 54% of Total Capacity,” Synergy Research Group, March 19, 2025 (<https://www.srgresearch.com/articles/hyperscale-data-center-count-hits-1136-average-size-increases-us-accounts-for-54-of-total-capacity>); “Cloud Market Share Trends—Big Three Together Hold 63% while Oracle and the Neoclouds Inch Higher,” Synergy Research Group, November 21, 2025 (<https://www.srgresearch.com/articles/cloud-market-share-trends-big-three-together-hold-63-while-oracle-and-the-neoclouds-inch-higher>); “The 2026 AI Index Report,” Stanford HAI (<https://hai.stanford.edu/ai-index/2025-ai-index-report> and <https://hai.stanford.edu/ai-index/2026-ai-index-report>); “The Global AI Talent Tracker,” MacroPolo (<https://archivemacropolo.org/interactive/digital-projects/the-global-ai-talent-tracker>).
3. “HE GCCSG: GCC States Adopt Ambitious National Strategies in AI and Digital Economy, Cementing Global Investment and Technical Application Leadership,” GCC, February 5, 2026 (<https://www.gcc-sg.org/en/MediaCenter/News/Pages/news-2026-2-5-9.aspx>).
4. Shubham Kalia, Aditya Soni and Mrinmay Dey, “Amazon Cloud Unit’s Data Centers in UAE, Bahrain Damaged in Drone Strikes,” Reuters, March 2, 2026 (<https://www.reuters.com/world/middle-east/amazon-cloud-unit-flags-issues-bahrain-uae-data-centers-amid-iran-strikes-2026-03-02/>).
5. Ruqayya Al Qaydi, “UAE a ‘Great American Ally,’ Says US Official as First AI Chips Delivered,” Khaleej Times, May 11, 2026 (<https://www.khaleejtimes.com/uae/uae-a-great-american-ally-says-us-official-as-first-ai-chips-delivered>).
6. “What Is Aadhaar?” (<https://eur01.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.pib.gov.in%2FPressReleasePage>).

7. Bleu website (<https://www.bleucloud.fr/qui-sommes-nous/>).
8. The E.U. Artificial Intelligence Act (<https://artificialintelligenceact.eu/>).
9. National Supercomputing Centre Overview (<https://www.nscs.sg/overview/>).
10. Harry Menear, "Pionen: Inside the World's Most Secure Data Centre," Data Centre Magazine, July 7, 2020 (<https://datacentremagazine.com/data-centres/pionen-inside-worlds-most-secure-data-centre>).
11. About Gaia-X (<https://gaia-x.eu/about/>).
12. AI Apprenticeship Programme (<https://aiap.sg/apprenticeship/>).
13. AI Security Institute (<https://www.aisi.gov.uk/about>).
14. e-Governance (<https://e-estonia.com/solutions/e-governance/data-embassy/>).

Strategy&

Strategy& is a global strategy consulting business uniquely positioned to help deliver your best future: one that is built on differentiation from the inside out and tailored exactly to you. As part of PwC, every day we're building the winning systems that are at the heart of growth. We combine our powerful foresight with this tangible know-how, technology, and scale to help you create a better, more transformative strategy from day one.

As the only at-scale strategy business that's part of a global professional services network, we embed our strategy capabilities with frontline teams across PwC to show you where you need to go, the choices you'll need to make to get there, and how to get it right.

The result is an authentic strategy process powerful enough to capture possibility, while pragmatic enough to ensure effective delivery. It's the strategy that gets an organization through the changes of today and drives results that redefine tomorrow. It's the strategy that turns vision into reality. It's strategy, made real.

Read the latest Ideation Center insights



ideationcenter.com

Connect with Strategy& Middle East



twitter.com/strategyandme



linkedin.com/company/strategyandme



strategyand.pwc.com/me

Connect with Strategy&



twitter.com/strategyand



linkedin.com/company/strategyand



youtube.com/user/strategyand

strategy&

Part of the PwC network

www.strategyand.pwc.com/me

© 2026 PwC. All rights reserved. PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see www.pwc.com/structure for further details. Mentions of Strategy& refer to the global team of practical strategists that is integrated within the PwC network of firms. For more about Strategy&, see www.strategyand.pwc.com. No reproduction is permitted in whole or part without written permission of PwC. Disclaimer: This content is for general purposes only, and should not be used as a substitute for consultation with professional advisors.