

# Middle East, Turkey, and Africa Telecom Markets, ICT Regulations, and Telco Transformation Strategies

AN IDC CONTINUOUS INTELLIGENCE SERVICE

IDC's *Middle East, Turkey, and Africa Telecom Markets, ICT Regulations, and Telco Transformation Strategies* service analyzes three primary areas in the META region: 1) core telecom services, particularly for the business (fixed and mobile) and wholesale (voice, data, OTTs, etc.) segments; 2) network/technology deployments, services, monetization, and horizontal and vertical use cases (5G, IoT, edge, FTTx, SDN/NFV, etc.); and 3) ICT policy & regulations (digital regulations covering telecom & IT platforms and services).

## Markets and Subjects Analyzed

- Gulf Cooperation Council (GCC) countries (Saudi Arabia, UAE, Qatar, Oman, Bahrain, and Kuwait), Turkey, South Africa, and Rest of MEA: core telecom services trends, opportunities, and challenges
- GCC, Turkey, and Rest of MEA: ICT policy & regulations
- GCC, Turkey, South Africa, and Rest of MEA: 5G spectrum, services, tariffs, and monetization
- GCC, Turkey, South Africa, and Rest of MEA: wholesale telecom trends and transformation
- GCC, Turkey, South Africa, and Rest of MEA: IoT ecosystem and extended telecom edge enabled services

## Core Research

- 5G Spectrum Policies in the GCC (Saudi Arabia, UAE, Qatar, Oman, Bahrain, and Kuwait) and South Africa
- 5G pricing strategies in the GCC (Saudi Arabia, UAE, Qatar, Oman, Bahrain, and Kuwait) and South Africa
- 5G Use Cases, Priorities, and Challenges for Organizations in the GCC (Saudi Arabia, UAE, Qatar, Oman, Bahrain, and Kuwait)
- Saudi Arabia IoT Market Forecast, 2021–2025
- Digital Regulation: Developments and Initiatives Across the Middle East, Turkey, and Africa
- GCC (Saudi Arabia, UAE, Qatar, Oman, Bahrain, and Kuwait) Wholesale Telecom Market Overview
- IoT Use Cases, Priorities, and Challenges Among Organizations in the GCC (Saudi Arabia, UAE, Qatar, Oman, Bahrain, and Kuwait)
- UAE IoT Market Forecast, 2021–2025
- Turkey Telecommunication Services Market Forecast, 2021–2025

In addition to the insight provided in this service, IDC may conduct research on specific topics or emerging market segments via research offerings that require additional IDC funding and client investment. To learn more about the analysts and published research, please visit: [Middle East, Turkey, and Africa Telecom Markets, ICT Regulations, and Telco Transformation Strategies](#).

## Key Questions Answered

1. How are the transformation strategies of telcos evolving in the region, and how do they compare with each other and with global best practices? What should regional telcos' service strategies be to transform and build on their adjacent service capabilities as they invest in 5G core and edge transformation?
2. What should the strategies and priorities of regional telcos be to monetize new technology investments and build strong value propositions for businesses and consumers in light of global/regional benchmarks and best practices?
3. What are the latest telecom and digital policy & regulatory trends globally that have an impact on the broader ICT ecosystem? How do they compare with those in the META region? And what are the key learnings? What guidance can be offered?
4. What approaches are taken to digital regulations in various countries in the region, and how do they compare with each other and with those of progressive countries in other parts of the world? What should the approach of regional policymakers and regulators be to enable and foster DX in their countries?
5. What are the key challenges of telecom wholesalers in META, and how can wholesalers address them? How are the regional telcos evolving their wholesale strategies and services as the market transforms from Wholesale 1.0 to Wholesale 2.0?

## Companies Analyzed

This service reviews the strategies, market positionings, and future directions of several telecom service providers and the policies and governance strategies of ICT regulators in the Middle East, Turkey, and Africa, including:

Ooredoo META Region, Mobily, Etisalat META Region, CITC Saudi Arabia, Zain META Region, du, STC, Integrated Telecom Company (ITC-Salam), CITRA Kuwait, CRA Qatar