

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

AN IDC CONTINUOUS INTELLIGENCE SERVICE

IDC's *Middle East, Türkiye, 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, etc.); and 3) ICT policy & regulations (digital regulations covering telecom and IT platforms and services).

Markets and Subjects Analyzed

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

Core Research

- South Africa IoT Market Trends, 2023
- LEO/MEO Satellite Trends and Developments in the Middle East, Türkiye, and Africa, 2023
- Digital Regulation Trends in the Middle East, Türkiye, and Africa
- Middle East, Türkiye, and Africa Industrial IoT Market Trends, 2023
- SD-WAN Trends in Gulf Cooperation Council Countries, 2023
- South Africa Open RAN/Open Core Trends and Developments
- Market Analysis Perspective: Wholesale Telecom Trends in the Middle East, Türkiye, and Africa, 2024
- Sub-Saharan Africa 5G Monetization Trends, 2024
- Saudi Arabia Telecom Services Trends, 2024
- Türkiye Telecom Services Trends, 2024
- Saudi Arabia Edge End User Trends, 2024

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, Türkiye, 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?
2. 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?
3. 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?
4. Which of the latest telecom and digital policy & regulatory trends, globally, are impacting 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?
5. 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?
6. What should the approach of regional policymakers and regulators be to enable and foster DX in their countries?
7. 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, Emirates Telecommunications (Etisalat META Region), MTN, Saudi Arabia Communications, Space and Technology Commission, Zain META Region, Emirates Integrated Telecommunications (du), STC, Integrated Telecom Company (ITC-Salam), Communication and Information Technology Regulatory Authority (CITRA) Kuwait, Communications Regulatory Authority (CRA) Qatar