

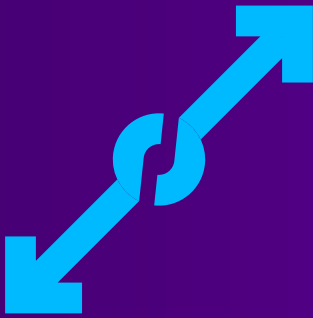


# WINNING

## IN AN ERA OF DISRUPTION & DIVERSIFICATION

**ACCENTURE INNOVATION  
MATURITY INDEX  
SAUDI ARABIA, 2020**





Disruption is a growing challenge across multiple sectors and industries within Saudi Arabia. Executives are aware that failing to adopt new technologies could leave their businesses vulnerable to disruption. Along with changing technologies, an ambitious national economic diversification strategy has been driving Saudi Arabian companies to seek new avenues of growth. Just before COVID-19 and the rapid changes brought by the pandemic, Accenture launched the 2020 Middle East Innovation Maturity Index, which analyzed 200 of the leading companies across the region. Accenture interviewed 100 C-level executives in Saudi Arabia across 15 industries to understand how their businesses are preparing for and are positioned to deal with disruption. This information is vitally important today.

The period that follows COVID-19—one of business uncertainty and a muted economic recovery—is expected to quickly bring new competitive threats and opportunities. A return to pre-COVID business practices is unlikely; instead, what’s coming is a decade of “Never Normal”—a new era defined by fast-changing shifts in cultural norms, societal values, and user behavior. To flourish in this rapidly shifting economic environment, businesses will need to adopt radically new strategies—strategies that emphasize growing their innovation capabilities and pivoting to new business opportunities, powered by digital technologies. Accenture’s 2020 Innovation Maturity Index identified a group of digital disruptors that we call Innovation Champions. These companies are thriving in the age of disruption. One standout trait they share is their ability to unlock trapped value better than their peers. Innovation Champions heavily leverage data and digital technologies to execute business pivots—meaning they are growing and transforming their core business while they are building new businesses.

# Why innovation matters right now?

**Saudi Arabia, as the biggest economy in the Middle East, plays a pivotal role in establishing a positive benchmark for innovation from which other nations can learn.**

To diversify its economy and open up new avenues for doing business, Saudi Arabia has commissioned several investment initiatives, including earmarking more than \$1.4 trillion<sup>1</sup> toward major projects. Many of these projects, such as Neom City, are already planned or underway. In the past few years, the country has focused on implementing strategies to achieve the economic transformation laid out in its Vision 2030 Plan. These strategies include investing in, and encouraging investment across new sectors such as tourism, high-tech, and renewable energy; and privatising state companies and assets to stimulate private investment—e.g., Saudi Aramco’s public listing in December 2019. To meet the demands of a rapidly growing urban population, the country is also increasing investment in key areas, such as infrastructure, transport, and smart cities.

These strategies are opening up significant opportunities for incumbents and new entrants across industry sectors. However, to leverage these opportunities and achieve economic transformation, businesses and industries in Saudi Arabia need to increase their competitiveness. The impact of COVID-19, which has caused massive disruption to society, business practices and the economy, reaffirms the value of embracing innovation in order to navigate the “Never Normal.”

**Innovation is the main source of disruption—and consequently, the antidote to being displaced.** The domination of industry giants such as Netflix and Amazon illustrate the point that companies that thrive in the age of disruption actively innovate. The findings of our 2020 Innovation Maturity Index bear this out.



# “Playing it safe” amid disruption is risky

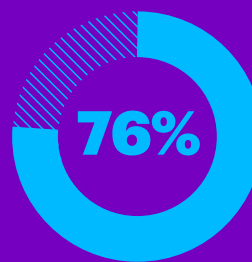
## 73%

**of Saudi Arabian companies say they are not prepared for disruption**

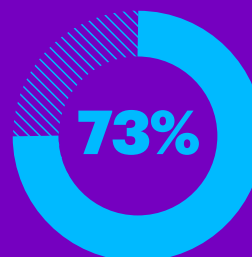
Disruption permeates every industry and geography—and it’s constant. Industries in Saudi Arabia that keep to traditional ways of conducting business and commerce, and don’t initiate modern, innovative practices will be more vulnerable to disruption. With the onset of the COVID-19 pandemic and the dawning reality that the virus might be with us for an extended period, businesses are seeing changes in the fiscal landscape, and are being compelled to adapt their operating models. Maintaining a “business as usual” mindset can be a risky strategy, leaving many businesses open to being disrupted.

Rapid advances in digital technologies introduce new, more efficient and effective processes, making new business models possible and providing unparalleled opportunities for value creation. However, unleashing that value requires a strong innovation capability.

As part of its 2020 Middle East Innovation Maturity Index study, Accenture interviewed 100 C-level executives in Saudi Arabia across 15 industries to understand how their businesses are preparing for and are positioned to deal with disruption. Our research shows that companies in Saudi Arabia are not prepared for disruption. Their responses highlight the fact that their businesses are largely unprepared for the short-term future:



**expect their industry to be disrupted by new innovations in the next three years, especially from new competitors and technologies; and**



**concede that their companies are not prepared for disruption.**

**With technological advances creating abundant opportunities to harness value, why are local companies slower to unlock this value and get onto the side that embraces disruption?**

## Three out of four Saudi Arabian companies continue to compete in their legacy businesses using mostly traditional approaches

Our experience in studying disruption shows that when companies are in the midst of being disrupted, they operate more cautiously. They raise barriers to entry instead of extending themselves outward. They rely on what's worked for them in the past, rather than seek deep changes from within. They double down on efficiency, rather than committing to real innovation. In summary, they focus their energies and resources on their core business, which is the unit that generates the highest profits. While this is instinctual and understandable, it's not a winning strategy in a climate that is now characterized by innovation and more rapid change. Ultimately, these choices keep companies in survival mode and distract them from the larger goal, which should be to actively shape their future.

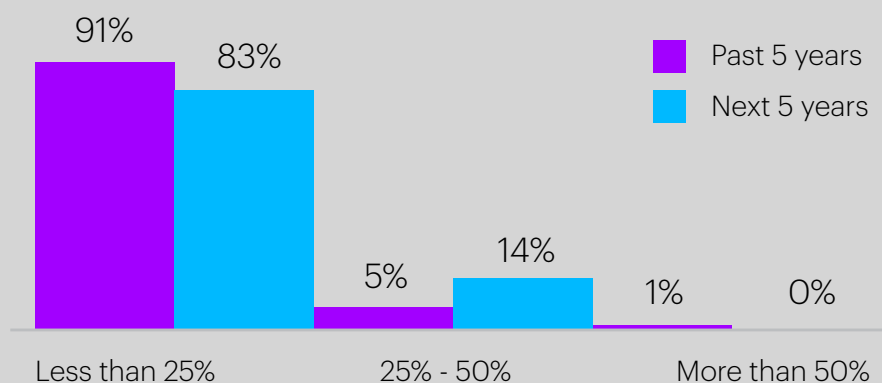
As disruption escalates and business growth begins to moderate, companies that have not kept pace with change—i.e., that haven't adopted new technologies to increase efficiencies and business agility, innovate and enter new markets—find themselves ill-equipped to compete.

Simply put, companies on the wrong side of disruption are failing to unlock value trapped within their businesses. For them, the economic opportunity is visible but unreachable—it cannot be attained with their existing business models or capabilities.

Our research shows that **three-quarters (75 percent) of Saudi Arabian companies** continue to use traditional approaches or are just starting to transform their legacy business into new business. Further, most companies here have made little investment in innovation and don't plan to allocate significant investment going forward.

Specifically, only one in 20 companies (5 percent) said they put between 25 percent and 50 percent of their financial investments toward innovation over the past five years. Further, the vast majority of companies—83 percent—said they plan to put less than 25 percent of their financial investments toward innovation over the next five years, and only one in seven companies (14 percent) plans to commit 25 to 50 percent of their financial investments toward innovation over that timeframe (Figure 1).

**Figure 1: Financial investments in innovation over the past (and next) five years: Saudi Arabia**



Source: Accenture Research analysis based on survey data.

# Deliberate innovation structures and practices drive success

**To develop the Innovation Maturity Index, we took a bottom up approach—we identified a number of innovation characteristics and factors from literature reviews and from our survey insights where we studied and tested the adoption of these innovation characteristics and factors on high-growth companies globally. The Accenture Innovation Maturity Index groups these characteristics, evaluating the extent to which respondents apply the characteristics and factors to innovate and release value.**

Throughout our study, we found that high-growth companies—those that, in terms of revenue and profitability growth, have outgrown their peers in the last five years and are expected to outgrow their peers in the next five—take a distinct approach when using innovation to unlock trapped value. These leaders have focused on changing at a fundamental level, deliberately building the structural capacity to innovate and embedding

key innovation practices within their business that lead to overall organizational change. We deem those that follow this approach Innovation Champions.

To get there, Innovation Champions continue to invest aggressively in innovative strategies. They take a focused and decisive approach to innovation: it is change-oriented, outcome-led and disruption-focused.

These leaders set up deliberate structures for innovation success. The structures that enable these companies to Innovate by Design include innovation strategy, -culture and -architecture structures.

## 82%

of high-growth companies innovate by setting up deliberate structures for innovation success—82 percent of these companies agree that innovation strategy, -culture and -architecture structures describe their organization to a significant extent.

**Companies that thrive in the age of disruption build deliberate innovation structures and adopt seven innovation practices that lead to organizational change**

**The structures that enable these companies to “Innovate by Design” include innovation strategy, culture, and architecture structures.**

**1**

**STRATEGY**

Successful innovators share a similar approach to innovation strategy.

- They aim for **disruptive advances** rather than incremental improvements.
- They **build concentrated innovation functions** rather than dispersed innovation teams.
- They **balance innovation between old and new**, and make sure innovation is quantifiable.

**2**

**CULTURE**

Companies that succeed at innovation have a culture of innovation in which:

- **Creativity is encouraged** and rewarded.
- **Ideation is applauded** by managers.
- **New thinking is fostered** within the organisation.

**3**

**ARCHITECTURE**

A well-designed innovation architecture specifies **clear processes for moving innovation** from ideation through R&D to mass-market commercialization, employing a combination of internal and external innovation capabilities.

**Next, consider the Innovation Practices:**

High-growth companies are notable for their adoption of seven innovation practices that lead to positive organizational change—90 percent of high-growth companies said that these practices describe their organization to a significant extent.

These companies are:

**DATA-DRIVEN**

Generating, sharing and deploying data to deliver new product and service innovations safely and securely.

**HYPER-RELEVANT**

Knowing how to be—and stay—relevant by sensing and addressing customers’ changing needs.

**TALENT-RICH**

Creating new, modern forms of workforces (flexible, augmented and adaptive) to gain a competitive advantage in fast-changing markets.

**ASSET SMART**

Adopting intelligent asset and operations management to run businesses as efficiently as possible, and to free up capacity for other innovative efforts.

**INCLUSIVE**

Adopting an inclusive approach to innovation and governance that incorporates a broader range of stakeholders.

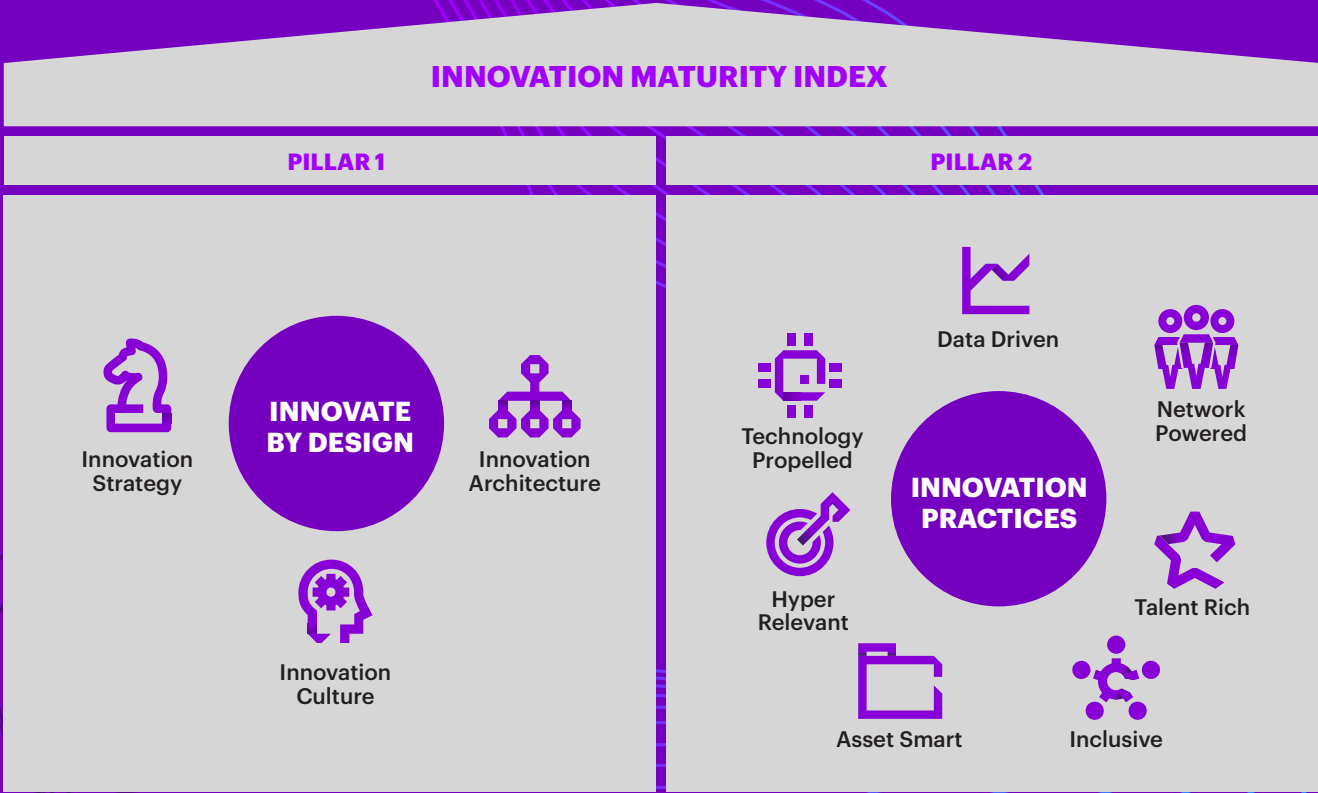
**NETWORK-POWERED**

Harnessing the power of a carefully managed ecosystem of partners to bring the best innovations to customers.

**TECHNOLOGY-PROPELLED**

Mastering leading-edge technologies that enable business innovation.

The Accenture Innovation Maturity Index framework is designed on the back of these insights to measure the readiness of companies' innovation capabilities to unlock trapped value and support their journey to digital transformation.



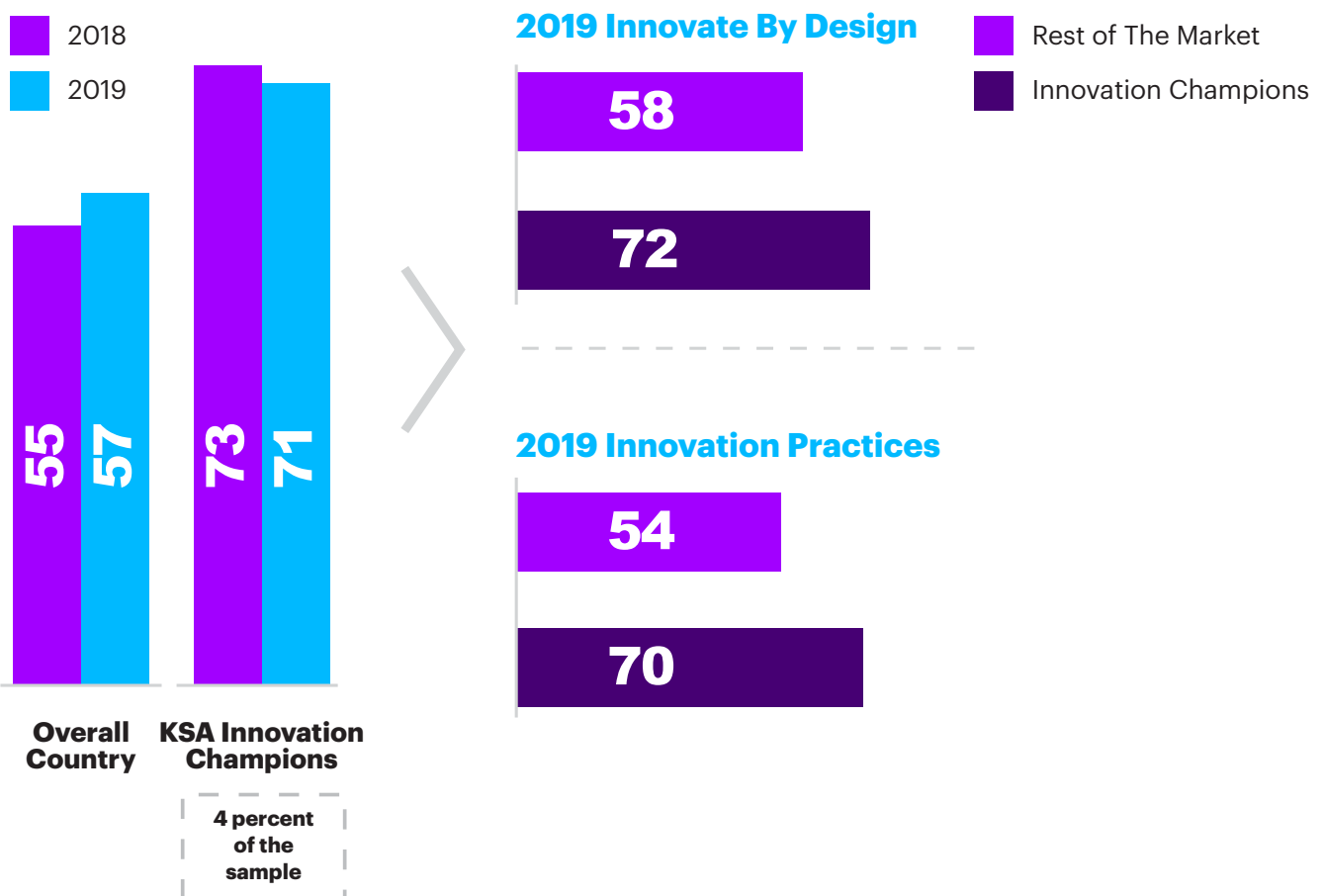


# Innovation maturity— benchmarking Saudi Arabian companies

**There is a large gap between companies on the winning side of innovation and those being disrupted by it.**

In Accenture’s 2020 Innovation Maturity Index, which included Saudi Arabia, scores show a marginal uplift from a year ago, with companies continuing to show caution as disruption increases. The data shows a sharp divide between those who have taken the necessary steps to embrace innovation and those who have not—and are being disrupted by it (Figure 2).

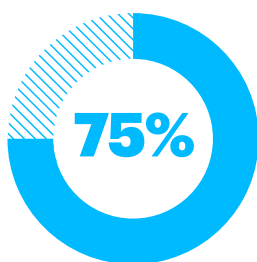
**Figure 2: Innovation Maturity Index Scores: Saudi Arabia**  
(out of 100) Overall country



**The winners are innovating—using digital technologies to unlock value in their current businesses, seize new market opportunities, scale up innovation, and grow their current and future businesses.**

Cloud computing illustrates this well. Adoption of this technology was initially driven by its ability to deliver significant cost savings and greater efficiencies to IT operations. Cloud is now seen as an innovation vehicle which can be used to unlock value and advance business objectives, including shaping new market strategies and reaching new customers. Consider the role of cloud in the transformation of content creation and delivery that is happening across the media and entertainment sectors. Without the advent of cloud computing, Netflix would not exist today.

Examples of other industry-specific cloud solutions are emerging daily, with the leading cloud providers—Amazon Web Services, Microsoft Azure and Google Cloud Platform—powering innovative solutions for market leaders. One such example is Johnson Controls’ use of Microsoft Azure’s Internet of Things (IoT) solution accelerators for its GLAS smart thermostat, which gives building owners remote access via Internet and mobile apps to monitor and control their heating and cooling systems.<sup>2</sup>



**Innovation Champions are nearly 75 percent more likely than non-Champions to believe that to transform their business it is either very or extremely important to migrate their technology infrastructure to the cloud.**

Cloud technology is the only platform that can provide the speed, scalability, global reach and agility businesses require to embrace innovation. Firms need to reposition cloud technologies within their organizations as a fundamental enabler of competitive operations and innovation. Innovation Champions see the value, being nearly 75 percent more likely than others to say that it’s very or critically important to migrate their technology infrastructure to the cloud in order to transform their business.

Beyond the benefits of agility, scale, and speed, large corporations in Saudi Arabia that move to the cloud could reap value through material total-cost-of-ownership savings, an up to 50 percent reduction in business outages, reduction in fixed capital spend, and enhanced security and business continuity—all of which are critical, especially during these times when COVID-19-related disruption is pervasive.

**As these innovators release more value, those unable to release trapped value become more disrupted.**

The average score on the Accenture Innovation Maturity Index for **Saudi Arabian companies** was 57 out of 100 this year. A small group of high-growth **Saudi Arabian** companies—4 percent of the sample—averaged 71 points, setting them apart from their peers as Innovation Champions.

These companies have built the innovation skills to create new products and services for customers and have achieved deep organizational change. This innovation “maturity” allows them to release trapped value much more effectively than their peers.

Their balanced approach to growth is, however, an equally important success factor.

# The innovation champion approach

**1** Innovation Champions use innovation strategically to unlock value in new businesses while revitalizing their core business.

Innovation Champions in Saudi Arabia are twice as likely as other companies in Saudi Arabia — 75 percent versus 37.5 percent — to use innovation strategically to unlock value in their new businesses.

Companies that survive disruption are constantly reinventing themselves, making their businesses relevant to what the future requires. But it's a balancing act—if companies are overly focused on their core business, they cannot pursue new opportunities; yet if they neglect

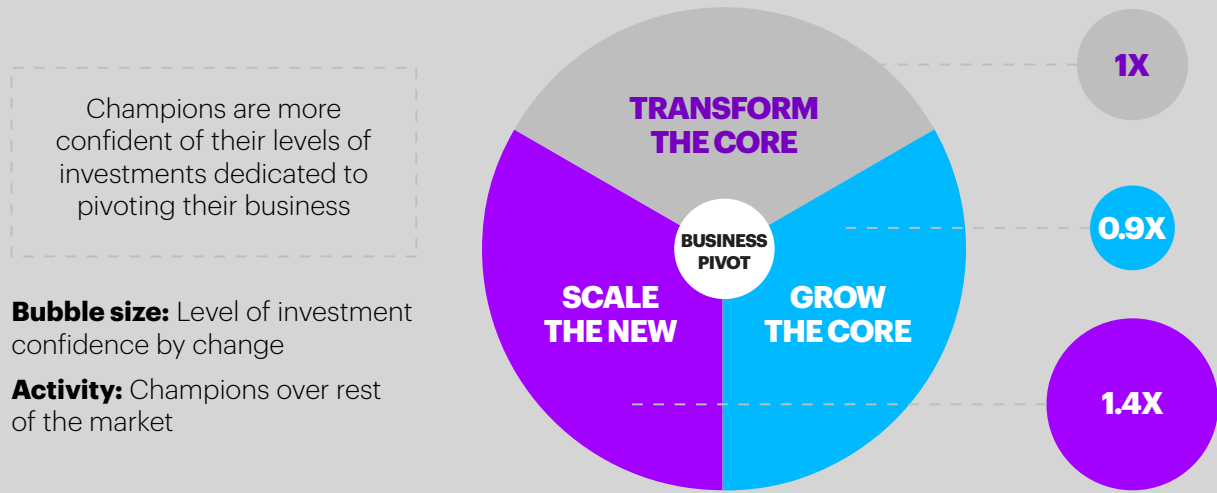
their core business by trying to innovate in too many new ways, they might find themselves short of the investment capacity they need.

To pivot successfully, companies need to adopt a new approach to organizational change. This strategy is continuously evolving and allows companies to manage their core assets as a dynamic portfolio within two lifecycle stages—the old and the new—ultimately growing and reshaping their core business into a new one built with new technologies.

**Champions, including those in Saudi Arabia, are more confident of the levels of investment they dedicate to pivoting their business (Figure 3).**



**Figure 3: Levels of investment dedicated to pivoting the business**



### The goals of Innovation Champions are to:

- **Transform the core to generate investment capacity.** This involves investing in processes and functions to increase efficiency and create value, which translates to higher profits.
- **Grow the core to sustain the fuel for growth.** This may involve finding new customers or markets for existing offerings or innovations that improve customer experience.
- **Scale the new to identify and scale new growth areas at pace.** To deliver the growth and impact the company expects, innovations—whether new products or new business models—must be commercialized and brought to the wider market.

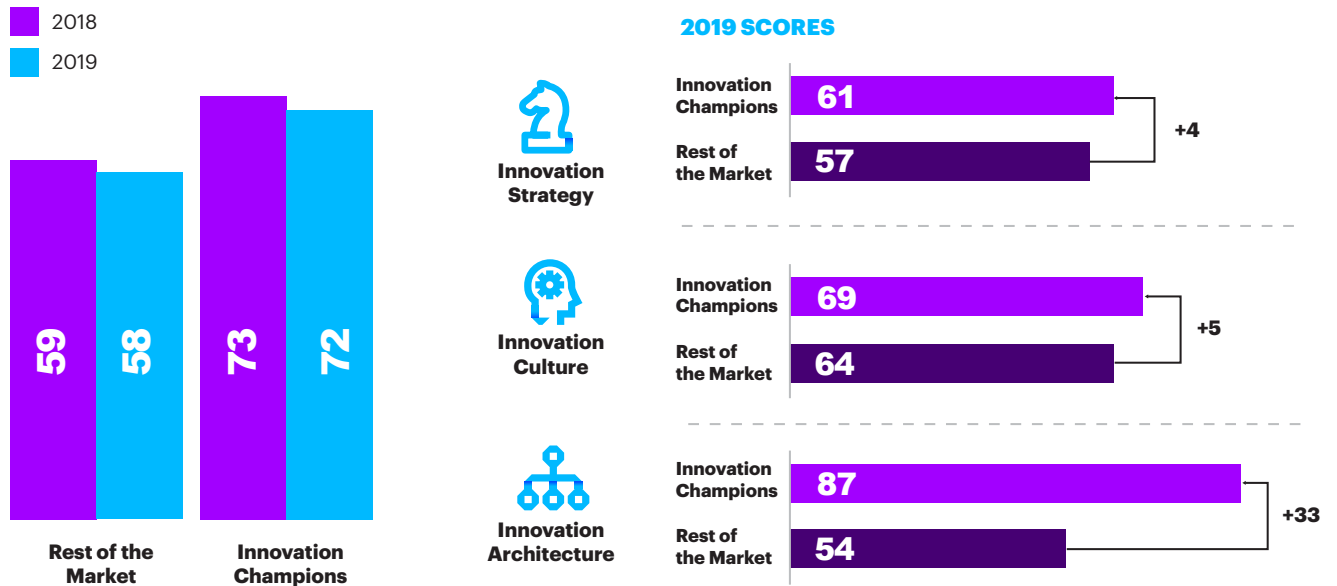
**By carefully scaling and timing investments, these companies can digitally transform while continuing to nurture and grow the core.**

2

**Innovation Champions see the value in building a strong Innovation Architecture that supports the execution of their pivot**

In Saudi Arabia, those that fall into Rest of Market rank close to the Innovation Champions in terms of putting “innovation strategy” and “culture of innovation” structures in place. However, they lag the Champions—by 33 points—in terms of building innovation architecture structures—i.e., the processes and capabilities needed to take innovation from ideation to a viable commercial product and then scaling it (Figure 4).

**Figure 4: Innovate by Design Index Scores** (out of 100)



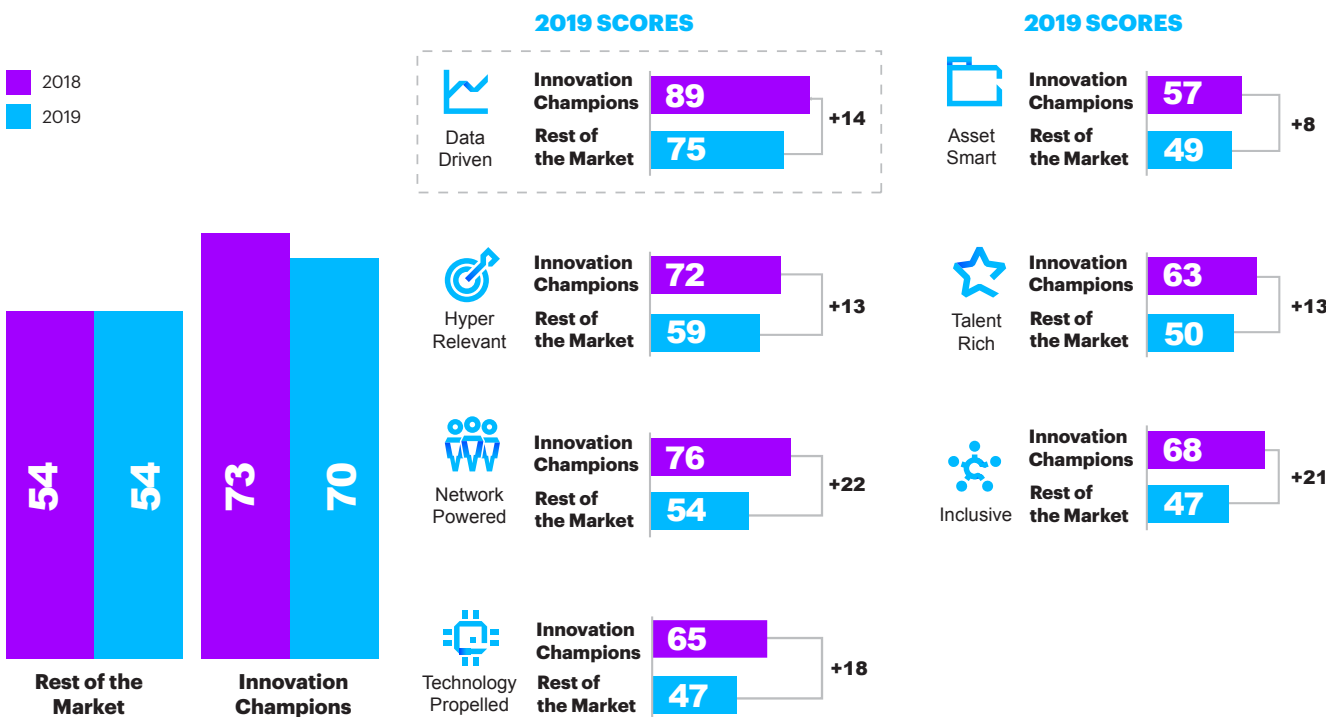
### 3

**Innovation Champions differentiate themselves in all innovation practices, but especially in their use of data.**

### **BECOMING DATA-DRIVEN IS THE ALPHA TREND—IT UNDERPINS SUCCESSFUL BUSINESS PIVOTS.**

Innovation Champions in Saudi Arabia are way ahead of other companies in the country in all innovation practices, averaging a 16-point lead across all seven practices (Figure 5). Increased focus on the adoption of all seven innovation practices will be important for companies aiming to drive significant growth. Becoming data-driven is, however, the one practice that underpins all others.

**Figure 5: Innovation Practices Index Scores** (out of 100)



According to the scoring for innovation practices within Accenture’s Innovation Maturity Index, Innovation Champions’ scores indicate that becoming data-driven is the alpha trend—i.e., the singular factor that creates the foundation for transforming the core business.

Data-led activities applied at the foundation can help increase data quality and trust, and create efficiencies to transform the core business and improve the current value of operations. At the same time, building a solid data foundation is critical to set up the analytics and AI capability to power business transformation.

## How the innovators do it



### Networked & hyper relevant

**Nike** has relied heavily on the power of its network to streamline supply chains and automate manufacturing to get the latest styles to customers as quickly and efficiently as possible. Working with global manufacturer Flex, Nike has simplified footwear assembly and shifted many tasks to robots.<sup>3</sup> It now produces uppers in 30 seconds, with 30 percent fewer steps and about 50 percent less labour. Nike has increased its hyper relevance with a new digital platform to gather and analyze customer data. And the company is more sustainable thanks to a new push to use recycled materials, which reduces the company's environmental impact. The payoff: From April 2013 to April 2018, Nike's share price more than doubled, versus a 62 percent gain for the S&P 500.

### One of Saudi Arabia's leading companies

has substantial plans for continuing to incorporate the latest technologies and innovation practices into its business. The company expanded on its GigaPOWERS reservoir simulating system to deliver tera-cell (TeraPOWERS) simulation capability, the world's first trillion-cell run, which is a breakthrough for the scientific community. The technology allows scientists to model the Kingdom of Saudi Arabia in its entirety on a reservoir simulation grid in order to look for new oil and gas fields. Despite headlines announcing the "end of oil", the industry giant's ability to adopt new technologies will allow it to remain hyper-relevant.<sup>4</sup>



### Data driven & customer centric

Telecommunications is an extremely competitive industry where customer loyalty has been historically fickle, resulting in stunted growth for those in this space. These companies are being confronted with increased competition, industry convergence, and pressure to deliver an optimal and consistent customer experience across all channels. A major telecoms company

based in Saudi Arabia realized that the key to connecting with its customers and growing its business is to focus on the customer journey and deliver a more enhanced experience. This prompted the company to undertake a digital transformation to support its "customer first" vision, underpinning it with first-rate analytics and a unified data architecture that enables the company to analyze data from a variety of sources and customer touchpoints.

Data covering billing, complaints and failed services is brought into the analytical platform, along with data on tariff plans, offers, competitive offers, customer loyalty, pricing, and network experience. By analyzing the data, the company can better identify customer needs and preferences—and thereby engage each customer with more-relevant offers. Data-driven communications have increased response rates and delivered better

customer experiences. These outcomes, buttressed by the data-led approach, have improved customer satisfaction while lowering costs and increasing revenues. The company has grown its market share to nearly 60 percent—an impressive feat in such a highly competitive environment. Additionally, call center service levels have improved from 30 to 90 percent as an added result of increasing efficiency and productivity.



### Asset smart & tech propelled

**A large medical complex** in Jeddah has implemented a hi-tech robotic medic to treat coronavirus patients at the hospital. The machine can carry out tests and make diagnoses, helping to curb the spread of the virus among hospital staff and patients

while also reducing the need for personal protective equipment. The robot allows medical staff to diagnose COVID-19 cases from a safe distance, produce radiographic photographs, check patient's vital signs and retrieve patient files via a smartphone app. The technology has increased response times by providing safe and high-quality medical services for both its staff and its patients.<sup>5</sup>



### Hyper relevant & health focused

**A major medicine and medical devices company** based in Saudi Arabia aims to increase cooperation with local and international partners in order to provide the highest quality health services within the public sector. To build a modern infrastructure that can increase efficiency and digital transformation, the company developed logistics services in six main centers and has partnered with a Chinese genome sequencing company. Through the

partnership, the company will supply 9 million COVID-19 testing kits, along with equipment, supplies, and 500 experts to carry out these tests. The agreement also includes the establishment of six large regional laboratories across Saudi Arabia, as well as a mobile laboratory that will have a capacity of 10,000 daily tests, with the ability to increase to 20,000 tests per day. This new laboratory infrastructure will quintuple the country's testing capacity, enabling testing of 30 percent of the population.<sup>6</sup>



# To compete and thrive in a digital era, start now

**Our study of high-growth companies indicates that innovation is a critical capability that companies need to cultivate in order to carve out their place in a highly disrupted global economy. In Saudi Arabia, most sectors are exposed to disruption, and it remains to be seen how quickly firms will adapt their strategies to include more innovative initiatives. While investment in innovation is growing, key structures—such as the business architecture required to realize and scale innovation—will need to be established before organizations can counter disruption in their sectors.**

Companies that fail to innovate, adopt new technologies and approaches to strengthen their core, and digitally transform, will not find it easy to hold their position in a disrupted market. In Saudi Arabia, new investment and economic diversification strategies are opening new markets, stimulating growth, and uncovering new opportunities. Taking the first steps toward innovation now and pivoting to the new can help companies build a foundation that will enable them to grow, compete and thrive in a digital era.



# How to put innovation to work

## Actions to take now

### Target enterprise trapped value



#### Be change-oriented...

**Identify** which target characteristics (e.g., becoming talent rich) are central to your growth strategy, and how intensely you are prepared to drive innovation-led change.



#### Be outcome-led...

**Prioritize** investments in those capabilities that you can bring back into your 'core' to help modernize the existing ways of working (e.g., acquisition of artificial intelligence or cyber security capabilities).



#### Be disruption-minded...

**Direct** your investment capacity to innovations that help expand your footprint into new markets, with foresight (e.g., using blockchain to improve women inclusion in insurance).

### Release enterprise trapped value



**Test** and embrace multiple innovation practices to redefine the most established ways of doing business (e.g., rotation of talent from business-as-usual roles to 'innovation gigs').



**Tie** your innovation investments to the desired long-term performance (i.e., growth revenue, profit, customer value growth, etc.), not only to short-term efficiency benefits.



**Organize** differently for disruptive innovation initiatives (e.g., go beyond experiments, and turn those initiatives with the highest disruption potential—or your 'moon shots'—into new businesses at a faster pace).

# About the research

**This report combines multiple streams of proprietary research using both outside-in and survey-based research methodologies.**

Our survey of 100 C-level executives sought insights on how large Saudi Arabian companies (across 15 industries) are responding to disruptive change: To what extent are they improving their innovation capabilities to unlock trapped value? Are they making good use of digital technology to transform legacy businesses and build new ones? These findings formed the basis for Accenture's Innovation Maturity Index. By studying innovation-related approaches, practices and processes of high-growth companies globally, we

designed the Accenture Innovation Maturity Index framework. This included gathering demographic and financial information about our survey respondents, as well as evaluating the extent to which respondents applied 49 innovation factors and 26 structural processes that (as determined by an extensive review of existing empirical literature) underpin their ability to release trapped value. High-growth companies are those that self-report revenue growth and profitability above the industry median over the last five years and expect this to continue through 2023. Innovation Champions are defined as high-growth companies scoring one standard deviation above the mean score on the index. Data used to compile this report is from 2019.

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