



IDC MarketScape

IDC MarketScape: Middle East Governance, Risk, and Compliance Services 2025 Vendor Assessment

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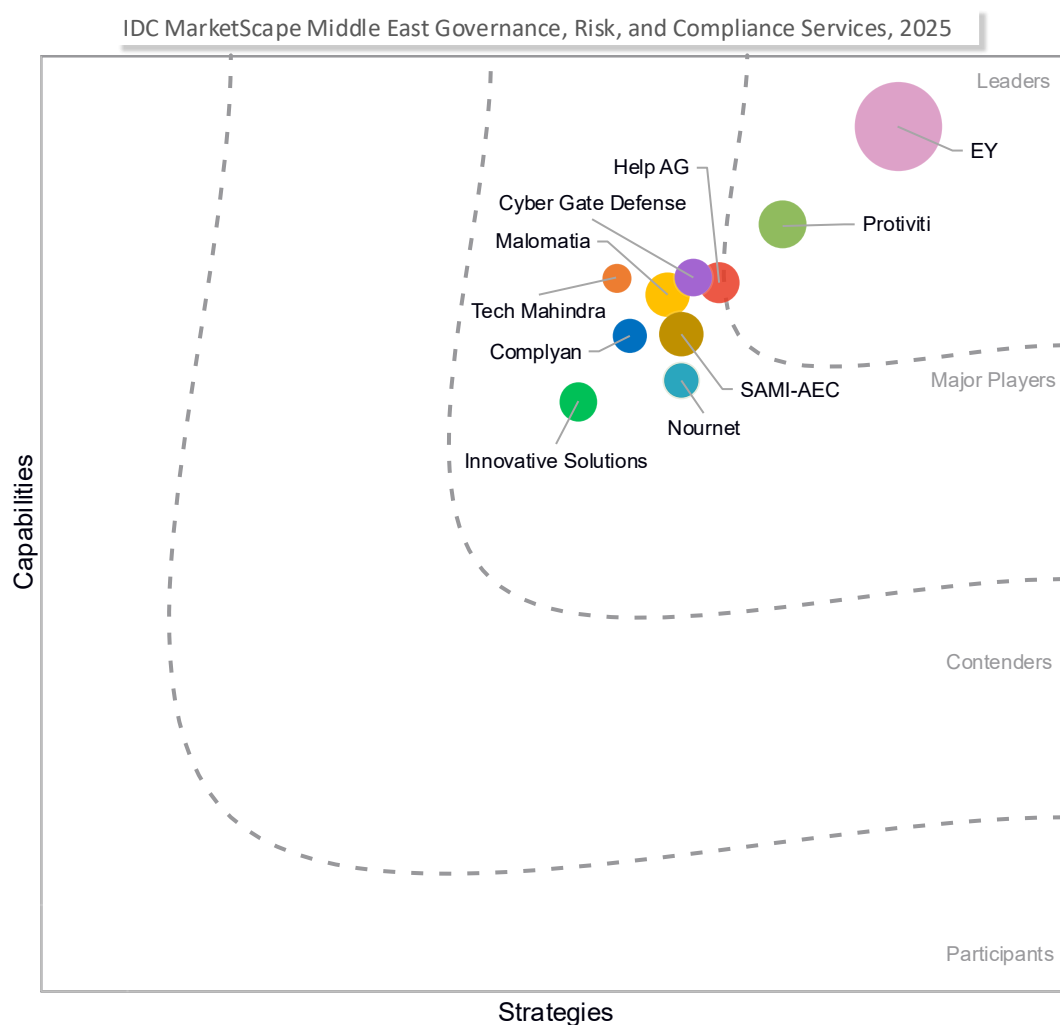
Shahin Hashim

This Excerpt is for EY

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape: Middle East Governance, Risk, and Compliance Services Vendor Assessment



Source: IDC, 2025

Please see the *Appendix* for detailed methodology, market definition, and scoring criteria.

IDC OPINION

Governance, risk, and compliance (GRC) services are increasingly recognized as a strategic necessity for organizations in the Middle East, driven by rapid economic

diversification, digital transformation, and integration into global markets. The complexity of the regulatory landscape, with each country having its own legal frameworks, makes GRC services indispensable for businesses operating across borders. The growing threat of cyber-risks and the need for data protection have pushed GRC to the forefront of executive agendas, with significant involvement from CEOs, CISOs, and boards in shaping cyber and compliance strategies.

The Middle East is witnessing a rapid evolution in digital policies and regulations, particularly in areas such as data privacy, AI governance, cloud computing, and cybersecurity. Countries such as the UAE, Saudi Arabia, and Qatar are leading the charge with comprehensive frameworks that address these areas. For instance, the UAE has implemented a Personal Data Protection Law and a National Cloud Security Policy, while Saudi Arabia has introduced its Global AI Hub Law and Personal Data Protection Law. These regulations are designed to ensure compliance, enhance security, and foster innovation, making robust GRC frameworks essential for organizations operating in the region.

Modern GRC services are being transformed by several key innovations:

- **AI and automation.** Artificial intelligence and automation are revolutionizing GRC by enabling real-time risk monitoring, predictive analytics, and automated compliance checks. These technologies reduce manual workloads, improve accuracy, and enable organizations to proactively address emerging risks.
- **Integrated GRC platforms.** Unified platforms now consolidate governance, risk, and compliance processes, providing a holistic view across the organization. This integration streamlines reporting, enhances decision-making, and breaks down operational silos.
- **Continuous control monitoring.** Instead of periodic assessments, leading GRC solutions offer continuous monitoring of controls and compliance, providing near-real-time assurance and faster response to issues.
- **Cloud-based and mobile solutions.** Cloud technology and mobile accessibility make GRC tools more scalable, flexible, and accessible, supporting remote work and real-time incident reporting from anywhere.
- **Environmental, social, and governance (ESG) and sustainability integration.** GRC frameworks increasingly incorporate ESG metrics, helping organizations align with regulatory expectations and stakeholder demands for sustainability.
- **Blockchain for compliance.** Blockchain is being used to enhance transparency, data integrity, and auditability in compliance processes, especially in industries in which trust and traceability are critical.

As the Middle East aligns more closely with international best practices, robust GRC frameworks will continue to be essential for organizations seeking to thrive in a complex and rapidly evolving regulatory environment. The strategic focus on

cybersecurity, with a significant portion of organizations planning to increase their cyber budgets and deploy AI tools for threat detection and compliance monitoring, highlights the ongoing importance of GRC services in the region.

IDC MARKETSCOPE VENDOR INCLUSION CRITERIA

Using the IDC MarketScope model, IDC evaluates vendors that provide governance, risk, and compliance services in the Middle East. The vendors included in this study must meet specific criteria to qualify for this vendor assessment:

- **Geographic presence.** Vendors must operate GRC services in at least one Middle Eastern country, ensuring a strong regional compliance understanding and focus.
- **Sales presence.** Vendors must have a sales force across one or more countries in the Middle East, demonstrating their ability to reach and serve a diverse customer base.
- **GRC services capability.** Vendors must possess GRC services that include trained professional cybersecurity staff with expertise in cybersecurity risk management, ensuring they can effectively manage and mitigate risks.
- **Revenue criteria.** Vendors must generate at least AED 2 million in revenue from GRC services, showcasing their financial stability and market presence.
- **Customer engagement.** Vendors must have at least three customers actively using their GRC services, reflecting their ability to maintain ongoing relationships and deliver value.

These criteria ensure the vendors assessed can provide comprehensive and effective GRC services to meet the diverse needs of organizations in the Middle East.

ADVICE FOR TECHNOLOGY BUYERS

When choosing a GRC service provider, organizations should adopt a structured approach to ensure the solution aligns with their business needs, regulatory environment, and long-term strategies. The following are the most important factors to evaluate and assess, enriched with insights from IDC research:

- **Define your business requirements.** Identify regulations and standards, clarify GRC goals, and engage key departments for comprehensive requirements.
- **Evaluate core features and capabilities.** Look for centralized policy management, risk assessment, automated compliance tracking, seamless integration, customizable analytics, workflow automation, scalability, intuitive user experience, robust security, and third-party risk management tools.

- **Assess vendor reputation and support.** Research provider experience, evaluate customer support quality, ensure a clear product road map, and request case studies or references.
- **Consider deployment and integration.** Choose between cloud, on-premises, or hybrid deployment, and confirm compatibility with your technology stack.
- **Analyze total cost of ownership (TCO).** Consider all costs, including licensing, implementation, customization, training, and maintenance, as well as weigh long-term value against investment.
- **Ensure security and compliance.** Look for data protection measures, encryption, compliance with privacy laws, and comprehensive audit trails.
- **Plan for scalability and customization.** Select a solution that scales with growth and complexity, offering tailored workflows, reports, and compliance modules.
- **Pilot and gather feedback.** Run a pilot or demo to test usability, collect end-user feedback, and address potential issues before full deployment.

By focusing on these areas, organizations can select GRC service providers that meet their current needs and support future growth and regulatory changes.

VENDOR SUMMARY PROFILES

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the *Appendix*, the description here provides a summary of each vendor's strengths and opportunities.

Ernst & Young (EY)

EY is positioned in the Leaders category in this 2025 IDC MarketScape for Middle East GRC Services.

EY has been providing GRC services in the Middle East for over three decades, with its regional risk consulting practice first established in the early 1990s. Today, the firm supports clients across a wide spectrum of industries including government, financial services, energy, manufacturing, and healthcare. Its GRC practice in the region comprises around 400 professionals, a significant majority of whom hold formal certifications in governance, risk, and compliance. The firm's operating model integrates onshore consultants with offshore delivery and global centers of excellence, allowing for a broad reach and consistent engagement quality across client types and geographies.

EY's approach to GRC is structured and life cycle oriented. The firm supports clients from the initial establishment of GRC functions through to operationalization, maturity assessments, and long-term monitoring. Its services are aligned with

international frameworks and tailored to meet local regulatory expectations. This includes designing risk and compliance programs for ministries and government-linked entities, helping establish centers of excellence to support enterprisewide risk governance, and deploying digital tools that streamline compliance and reporting processes.

EY also emphasizes technology enablement in its GRC delivery. Proprietary tools and other automation platforms are used to support internal audits, control monitoring, and risk assessments. These platforms help organizations reduce reliance on manual processes while improving timeliness and transparency of reporting. Training and capacity-building are embedded into EY's delivery approach through dedicated programs supported by the firm's Risk Academy and Risk Innovation Center, with localized content to reflect regional operating conditions and regulations.

Throughout the Middle East, EY has also played a role in standardizing GRC practices within public sector institutions and large holding groups. Its engagements typically include the implementation of structured governance models, formal risk taxonomies, and integrated assurance mechanisms. The firm continues to work closely with regulatory authorities, internal audit departments, and compliance teams to align processes, enhance organizational resilience, and strengthen decision-making through risk-informed insights.

Strengths

EY's strengths in the regional GRC market stem from its depth of experience, multisector coverage, and integrated delivery model. The firm's early entry into the region and sustained work with public institutions have enabled it to develop a nuanced understanding of regulatory structures and institutional frameworks. Its ability to tailor international best practices to the specific needs of Middle Eastern clients has been key in supporting entities at various stages of GRC maturity. The combination of advisory, technology, and implementation services enables EY to support end-to-end engagements, and its use of proprietary platforms provides clients with tools for real-time monitoring, automated compliance management, and improved visibility into control effectiveness. The presence of local delivery teams with Arabic language proficiency and familiarity with cultural and regulatory dynamics enhances EY's ability to engage effectively and deliver regionally appropriate solutions.

Challenges

While EY's GRC offerings are comprehensive, clients may occasionally face challenges in aligning internal structures with the firm's methodology, particularly in organizations with fragmented governance functions or limited risk ownership. Coordinating across multiple departments and integrating GRC activities into daily operations can require sustained change management. Additionally, regulatory

diversity across the region sometimes necessitates customization beyond standard frameworks, which may extend engagement timelines. In sectors with limited digital maturity, full realization of AI-enabled tools may be gradual and dependent on internal readiness.

Consider EY When

EY's GRC offerings are best suited for organizations in the Middle East that require structured, scalable, and technology-supported approaches to risk and compliance management. The firm is particularly well-positioned to support public institutions, regulated industries, and large enterprise groups looking to formalize or enhance their governance frameworks. Clients that require regional regulatory alignment, support for capacity building, and integration of compliance across multiple business units may find EY's experience and delivery model especially relevant. EY's role as both advisor and technology enabler enables it to support long-term GRC transformation programs across a variety of operating environments.

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is with customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis or strategies axis indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represent the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants,

and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores — and ultimately, vendor positions on the IDC MarketScape — on detailed surveys and interviews with vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

Governance, risk, and compliance (GRC) services encompass a collection of capabilities designed to help organizations achieve business objectives (governance), address uncertainty (risk management), and act with integrity (compliance). These services integrate governance, assurance, and management of performance, risk, and compliance across enterprise operations.

IDC defines the GRC services market as inclusive of both professional services and managed services that assist organizations in:

- **Enhancing performance.** Creating efficiencies and reducing risks across enterprise operations
- **Establishing governance.** Monitoring enterprise and IT governance programs to address various types of risk management and mitigation
- **Ensuring compliance.** Adhering to global laws, regulations, industry standards, and company policies while managing regulatory changes and their impact on the organization

Strategies and Capabilities Criteria

Tables 1 and 2 outline the key strategies and capabilities criteria for evaluating vendors in the Middle East GRC services marketplace. These criteria serve as a framework to assess vendors' ability to deliver effective solutions that align with organizational needs, regulatory requirements, and industry standards. Each table highlights specific attributes and benchmarks that define excellence in the GRC domain, enabling informed decision-making for stakeholders.

TABLE 1**Key Strategy Measures for Success: Middle East Governance, Risk, and Compliance Services, 2025**

Strategies Criteria	Definition	Weight (%)
Growth	<ul style="list-style-type: none">▪ Enter new markets and regions to increase market presence▪ Form alliances with key industry players to enhance service offerings	20
Innovation	<ul style="list-style-type: none">▪ Create unique GRC tools and platforms to differentiate from competitors	10
R&D pace and productivity	<ul style="list-style-type: none">▪ Allocate resources to research and development for cutting-edge innovations	5
Functionality or offering strategy	<ul style="list-style-type: none">▪ Tailor services to meet specific client needs and industry requirements▪ Improve client communication channels and feedback mechanisms	10
Others	<ul style="list-style-type: none">▪ Integrate sustainability into service delivery and operations▪ Uphold high ethical standards in all business dealings	10
Talent development	<ul style="list-style-type: none">▪ Recruit and retain skilled professionals in the GRC field▪ Provide ongoing training and development opportunities for staff	10
Digital transformation	<ul style="list-style-type: none">▪ Leverage digital technologies to enhance service delivery and efficiency▪ Strengthen cybersecurity measures to protect client data and services	10
Thought leadership	<ul style="list-style-type: none">▪ Share valuable insights and research to establish authority in the GRC space▪ Organize conferences and webinars to engage with industry stakeholders	10
Customer experience	<ul style="list-style-type: none">▪ Simplify the onboarding process for new clients to enhance their experience▪ Build and maintain strong relationships with clients for sustained success	15
Total		100

Source: IDC, 2025

TABLE 2

Key Capability Measures for Success: Middle East Governance, Risk, and Compliance Services, 2025

Capabilities Criteria	Definition	Weight (%)
Customer satisfaction	<ul style="list-style-type: none"> Measures the level of satisfaction among clients using the service Assesses the consistency and dependability of the service provided 	10
Range of services	<ul style="list-style-type: none"> Evaluates the provider's understanding and application of relevant laws Reviews the ability to conduct thorough and accurate audits Analyzes the provider's ability to provide risk assessment services Assesses the support provided during the implementation of GRC solutions Reviews the quality and availability of training programs for clients 	30
Functionality or offering	<ul style="list-style-type: none"> Looks at the use of advanced technology and innovative solutions Assesses the ease of integrating the service with existing systems Evaluates the use of AI for automating processes and improving efficiency Assesses the ability to use AI for forecasting and decision-making Looks at awards, certifications, and recognition within the industry Reviews feedback and testimonials from existing clients 	26
Customer service delivery	<ul style="list-style-type: none"> Examines the effectiveness of strategies minimize gaps identified risks Measures the speed and efficiency of the provider's customer support Assesses the availability of support services (e.g., 24 x 7 support) Assesses the adaptability of services to changing requirements 	17
Pricing model or structure of product/ offering	<ul style="list-style-type: none"> Evaluates the competitiveness and transparency of pricing models Assesses the balance between cost and the quality of service provided 	7
Portfolio benefits	<ul style="list-style-type: none"> Evaluates the ability to scale services as the client's needs grow Evaluates the ability to provide strategic advice and guidance 	10
Total		100

Source: IDC, 2025

Related Research

- *Worldwide Security Governance, Risk, and Compliance Managed Services Forecast, 2025–2029* (IDC #US53343025, July 2025)
- *United Arab Emirates IT Services Market Share, 2024: AI, Cloud, and Innovation Set the Pace for Market Share Leadership* (IDC #META53567425, July 2025)
- *United Arab Emirates IT Services Strategies* (IDC_P47077, July 2025)
- *IDC MarketScape: Worldwide Governance, Risk, and Compliance Software Vendor Assessment, 2025* (IDC #US53615325, June 2025)
- *Worldwide Security Governance, Risk, and Compliance Services Forecast, 2025–2029* (IDC #US53611525, June 2025)
- *Middle East and Africa IT Services Strategies* (IDC_P47073, May 2025)
- *Middle East Cybersecurity Strategy Guidance: Key Countries* (IDC #META53197625, March 2025)
- *IDC MarketScape: Middle East Managed Detection and Response Vendor Assessment 2024* (IDC #META52536124, September 2024)

Synopsis

This IDC MarketScape covers the rapidly growing governance, risk, and compliance (GRC) services in the Middle East, driven by heightened regulatory requirements, increased cybersecurity risks, and the region's ongoing digital transformation. The Middle East's GRC landscape is shaped by the need for continuous compliance management, risk quantification, and integration of advanced technologies such as AI and automation. While advisory services in the GRC domain exhibit high maturity, managed services offerings from providers remain underdeveloped relative to market needs. This gap presents a significant opportunity for vendors to expand their focus on managed GRC services, which are increasingly critical for organizations struggling to address complex compliance and risk management challenges.

"The Middle East's GRC market is at a critical juncture, with advisory services leading the way in maturity while managed services struggle to keep pace with growing market demands. Vendors must prioritize the development of scalable, managed GRC solutions to address the region's unique challenges, including regulatory complexity, talent shortages, and the integration of advanced technologies," said Shilpi Handa, research director, IDC.

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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