

BEYOND AI ADOPTION

THE GCC EXECUTION GAP 2026

Why the region's next
AI challenge is integration,
access and control



AI AMBITION
Strategy is ahead



DATA ACCESS
Infrastructure is behind



ENTERPRISE INTEGRATION
The last mile is the hardest



CONTROL & DEPENDENCY
The risk is becoming
the new reality



70%

of Middle East CEOs
have a clear AI roadmap

22%

say AI tools have access
to all relevant company data

48

percentage point
Execution Gap

70.1%

UAE working-age population
using generative AI

77%

of UAE executives report
significant AI-driven

BEYOND AI ADOPTION

THE GCC EXECUTION GAP 2026

Why the region's next AI challenge is not adoption — but integration, access and control.

The first AI race was about who could adopt it. The next will be about who can make it work.

Avanti AI Labs
Avanti Holding

The bottleneck is moving

The Gulf has moved remarkably quickly on artificial intelligence. The more useful question now is whether AI has moved as deeply into the enterprise as it has spread across it.

Across the Middle East, 70% of CEOs say their organisations have a clearly defined roadmap for AI. Yet only 22% say their most-used AI tools can access all relevant company documents and data. Within the GCC, that data-access figure falls to 16%.

48 pts

The difference between Middle East AI-roadmap readiness (70%) and full relevant enterprise-data access (22%). Avanti calls this the AI Execution Gap.

This report argues that the GCC is entering a post-adoption phase. The strategic problem is shifting from whether businesses use AI to whether they can connect it securely to the information, workflows and systems that make the organisation function.

AI can be present in an organisation without being truly connected to it.

Three patterns stand out. First, adoption and executive commitment are already high. Second, measurable value is appearing: 77% of senior UAE leaders in one IBM study reported significant AI-driven productivity improvement. Third, the constraints that emerge at scale are increasingly architectural — fragmented data, IT complexity, governance, sovereignty and dependency.

Sources: PwC 29th Global CEO Survey – Middle East Findings (2026); IBM/Censuswide Race for ROI UAE findings (2025).

The Gulf has crossed the adoption threshold

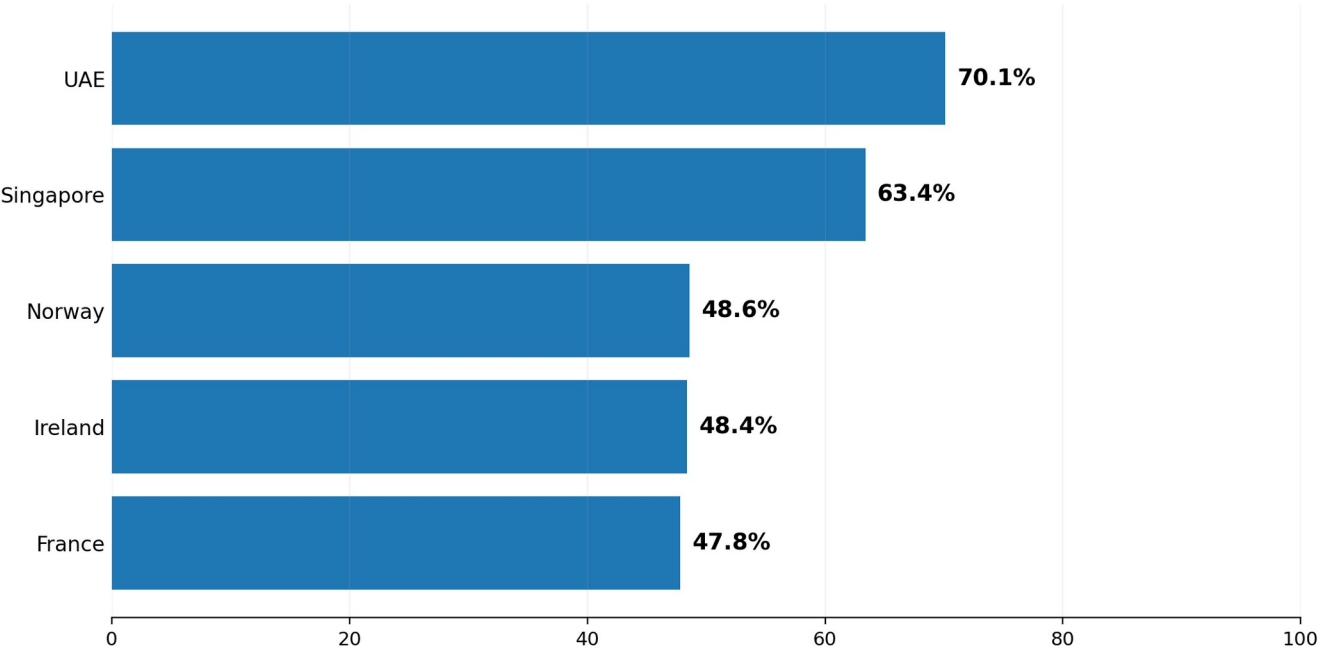
It is becoming difficult to describe the GCC simply as an emerging adopter of artificial intelligence. In the UAE, AI use is already approaching the characteristics of a general-purpose business technology.



Editorial visual: AI infrastructure and Dubai’s urban economy. Image credit: Corning GlassWorks AI.

UAE leads measured global AI diffusion

Share of working-age population using AI, March 2026

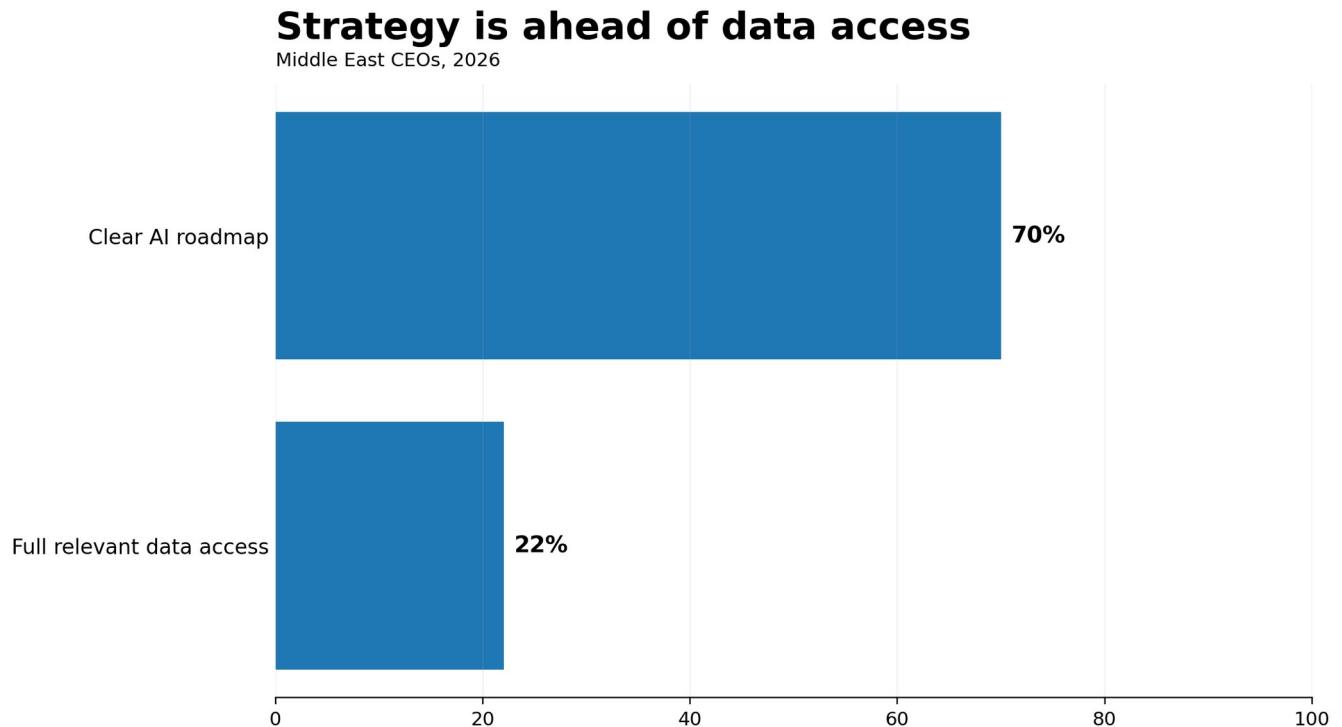


Source: Microsoft AI Economy Institute, Global AI Diffusion Q1 2026. UAE 70.1%; Singapore 63.4%; Norway 48.6%; Ireland 48.4%; France 47.8%.

Microsoft estimates that 70.1% of the UAE's working-age population was using AI by March 2026 — the highest measured rate in its national leaderboard. Once access becomes widespread, competitive advantage begins to move away from mere possession of the technology.

***The question is no longer: Who has access to AI? It is:
Who can make AI useful inside the machinery of an
organisation?***

Strategy has moved faster than data access



Source: PwC 29th Global CEO Survey – Middle East Findings, 2026. Avanti calculation: $70 - 22 = 48$ percentage points.

PwC reports that 70% of Middle East CEOs have a clearly defined AI roadmap, well above the 51% global benchmark. But only 22% say their most-used AI tools can access all relevant company documents and data.

Avanti defines the difference between those two reported indicators as the AI Execution Gap. It is deliberately narrow: it is not an AI maturity score and it does not mean that 48% of AI projects fail. It is a way of describing the distance between strategic readiness and information accessibility.

The ability to plan for AI appears substantially more widespread than the ability to give AI complete access to the information it needs.

The GCC's access constraint is unusually visible

16%

of GCC CEOs say their most-used AI tools have access to all relevant company documents and data, versus 29% globally.

The finding is striking because it sits beside strong evidence of regional AI deployment. PwC reports extensive AI use in demand-generation functions — sales, marketing and customer service — among 43% of GCC CEOs, compared with 22% globally.



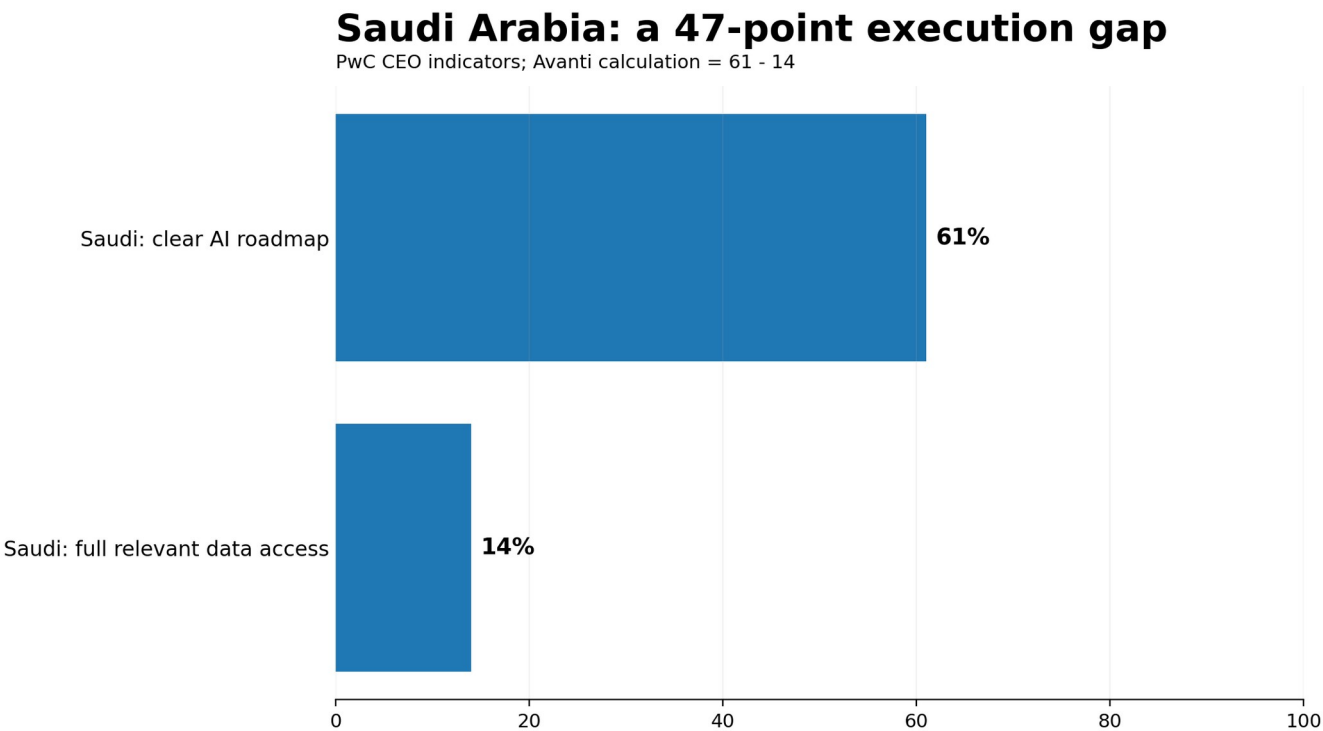
Editorial visual: large-scale digital infrastructure in the Dubai environment. Image credit: VOLT Datacenters.

The most plausible reading is not that the GCC lacks appetite for AI. It is that rapid adoption is exposing the harder problems that appear when AI moves from isolated tasks toward enterprise operations: data silos, permissions, legacy systems, integration, governance and security.

The bottleneck is moving from access to AI toward access by AI.

Source: PwC 29th Global CEO Survey – Middle East Findings, 2026.

Saudi Arabia: ambition meets the data wall

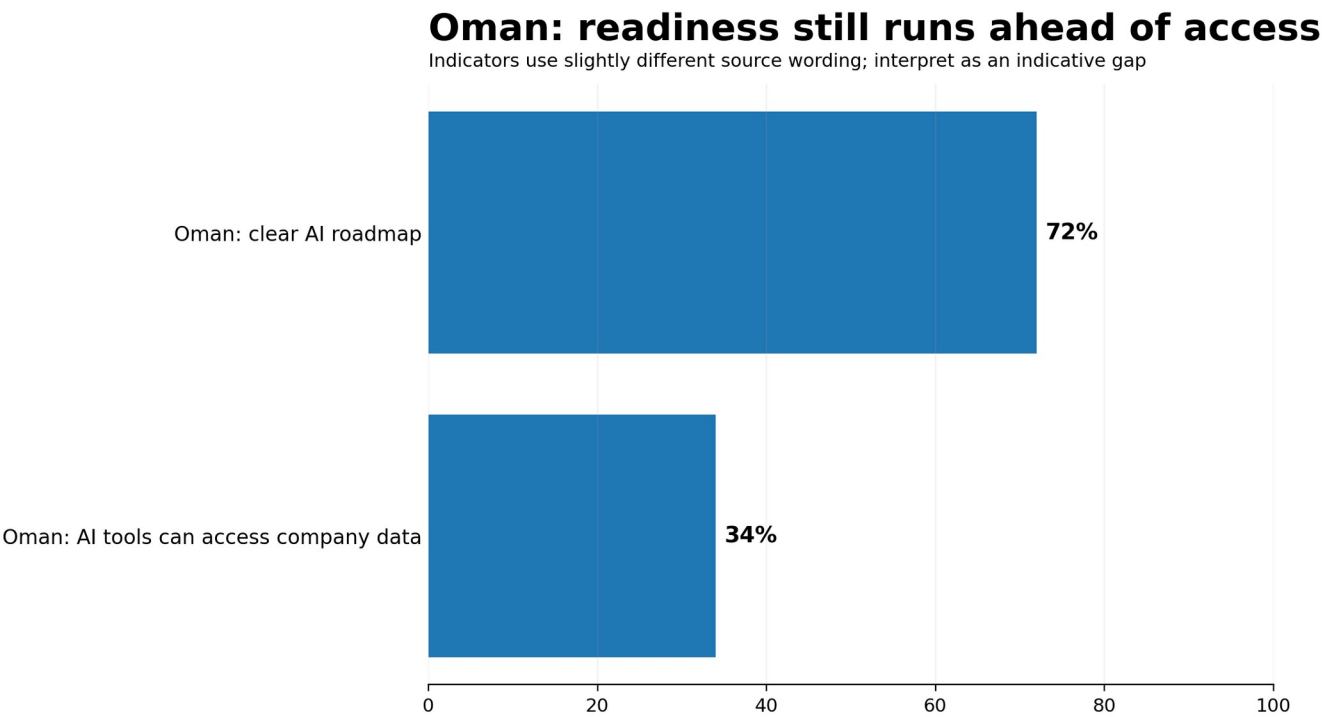


Source: PwC 29th Global CEO Survey – Saudi Arabia Findings, 2026. Avanti calculation: 61 - 14 = 47 percentage points.

Saudi Arabia provides the cleanest country-level illustration. Sixty-one per cent of CEOs report a clear AI roadmap, while only 14% say their most-used AI tools can access all relevant company data and documents.

That 47-point difference should not be interpreted as a failure rate. It is better understood as evidence that strategic intent and enterprise information architecture are moving at different speeds.

Oman: a smaller, but still material, readiness-access gap



Source: PwC 29th Global CEO Survey – Oman Findings, 2026. Note: PwC’s Oman page describes 34% as AI tools being able to access company data; wording is not identical to the regional ‘all relevant documents and data’ measure.

Oman shows the same broad pattern, though the source wording requires caution. Seventy-two per cent of CEOs report a clear AI roadmap, while 34% report that AI tools can access company data.

The 38-point difference is therefore best treated as an indicative comparison, not a directly interchangeable country ranking.

AI can spread faster than it integrates

Avanti uses the term wide-but-shallow AI to describe a stage of enterprise adoption in which AI appears across many functions but remains incompletely connected to the underlying systems, data and workflows of the organisation.

A business may use AI in customer communications, recruitment, marketing, document preparation and management reporting while those tools remain separated from CRM records, ERP data, contracts, procurement history, operating procedures and institutional knowledge.

43%

of GCC CEOs report extensive AI use in demand generation — sales, marketing and customer service — versus 22% globally.

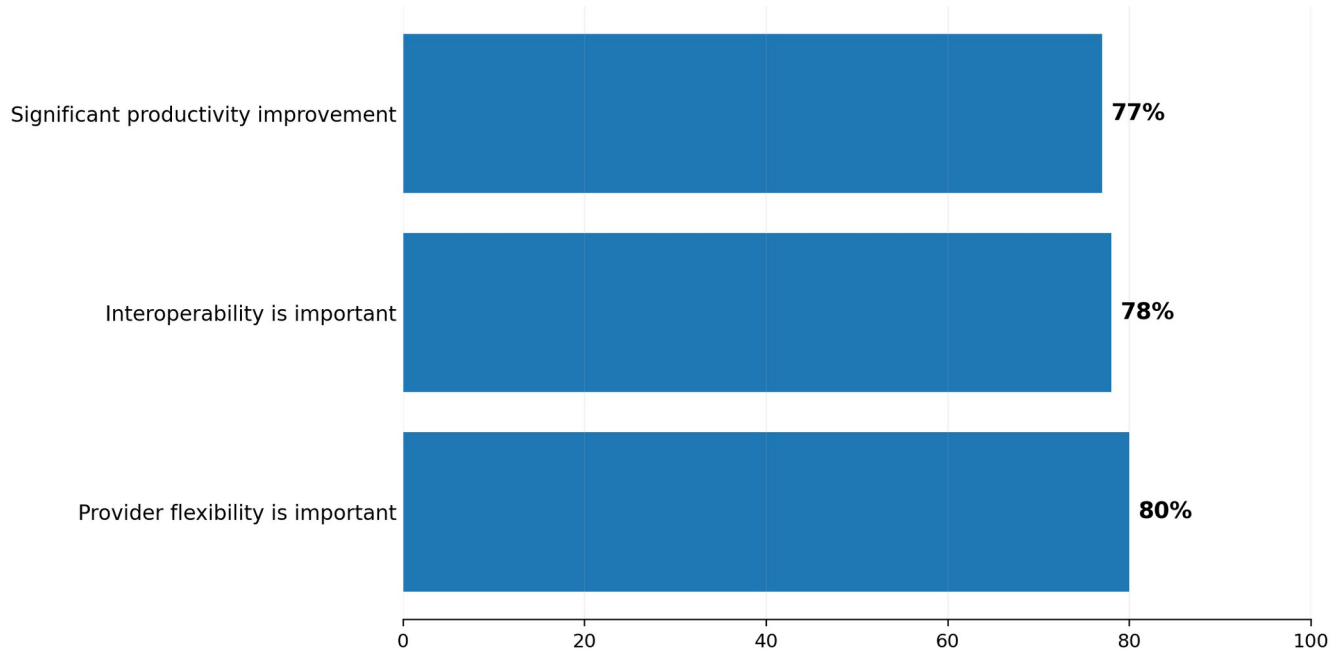
AI may be wide across the company while remaining shallow inside it.

This is not necessarily a weak stage. It can produce real productivity gains. But it becomes limiting when the organisation expects AI to perform multi-step work that depends on authoritative internal information.

AI is already creating measurable value

AI value is visible — and flexibility matters

UAE senior executives, IBM/Censuswide study



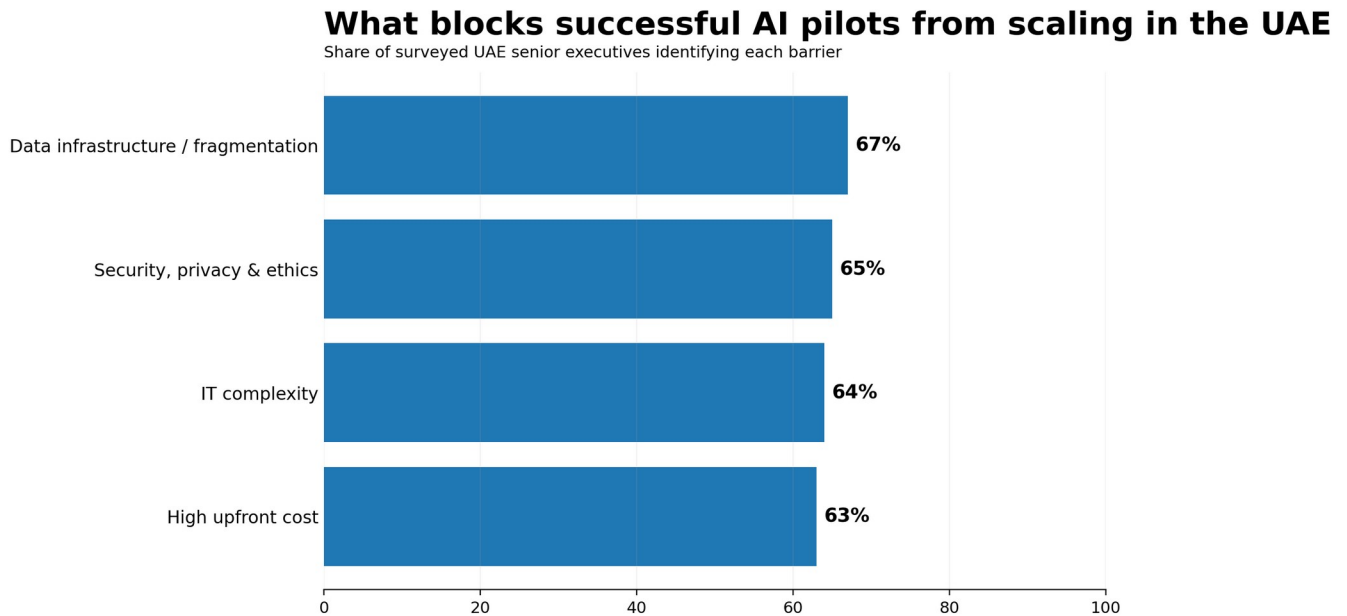
Source: IBM/Censuswide, Race for ROI, UAE findings, October 2025. UAE sample: 500 senior executives.

In IBM research involving 500 senior UAE executives, 77% said their organisations had achieved significant operational productivity improvements using AI. Forty-four per cent expected returns on AI investment in under a year.

This matters because it prevents a simplistic conclusion. The execution gap is not evidence that AI has failed. Businesses can create value before their architecture is complete.

The more interesting question is what happens when organisations try to scale those gains from individual activities into core business operations.

Scaling exposes architectural constraints



Source: IBM/Censuswide, Race for ROI, UAE findings, October 2025.

The obstacles identified by UAE executives are practical rather than futuristic: 67% cited inadequate data infrastructure or fragmentation, 65% security, privacy and ethical concerns, 64% IT complexity and 63% high upfront costs or reluctance to invest.

The lesson is important. Inside an enterprise, the smartest model is not automatically the most useful model. A sufficiently capable system that is securely connected to authoritative data and workflows can be more valuable than a frontier model operating without context.

The competitive question is shifting from model capability to organisational connectivity.

The Enterprise AI Last Mile

Avanti defines the Enterprise AI Last Mile as the transition between possessing AI capabilities and embedding them into the operational fabric of a business.

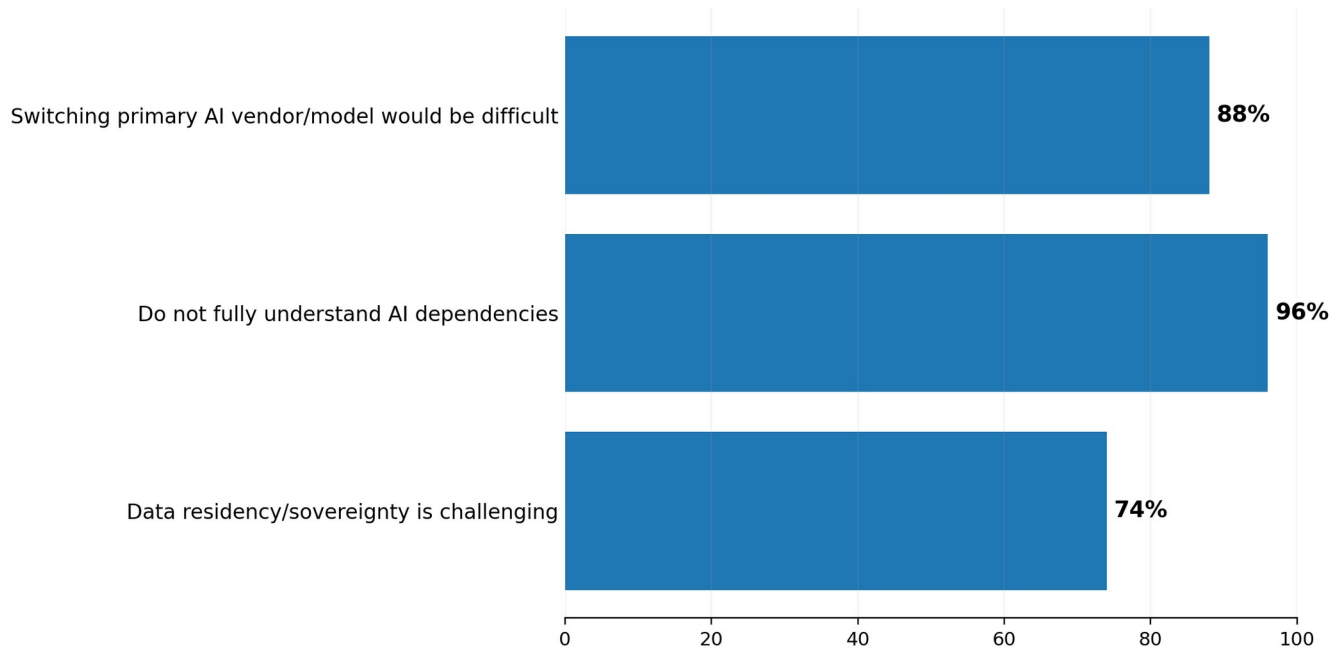
Dimension	The question that matters
Data access	Can AI retrieve the information required to perform its role?
Identity & permissions	Does the system know who is asking and what they are authorised to see?
Integration	Can AI interact with CRM, ERP, finance, HR, procurement and operational systems?
Context	Can it understand company policies, terminology, customers and institutional knowledge?
Governance	What may AI recommend, decide or execute?
Auditability	Can important AI actions be traced and reviewed?
Security	Can enterprise information remain protected?
Portability	Can the organisation change models or vendors without rebuilding its AI estate?

The last mile is where AI stops being a tool and starts becoming infrastructure.

Value is arriving faster than control

The control problem

UAE executives, IBM Institute for Business Value, 2026



Source: IBM Institute for Business Value, UAE findings, July 2026. The study reports 1,000 senior executives globally; UAE percentages shown are from the country findings.

IBM's 2026 UAE findings introduce a different problem: dependency. Eighty-eight per cent of surveyed UAE executives said switching their primary AI vendor or model would be difficult if required today. Nearly all — 96% — reported not fully understanding their AI dependencies across vendors, models and infrastructure.

These findings do not prove that vendor dependence has caused the productivity gains reported in IBM's separate 2025 study. But together they reveal a strategic tension: AI can become valuable before an organisation has complete visibility over what that value depends upon.

AI may be becoming valuable faster than it is becoming portable.

The Avanti Enterprise AI Progression

01 — ADOPTION

Can we use AI? Teams experiment; AI enters everyday work.

02 — VALUE

Does AI improve something that matters? Productivity, speed, revenue, service or cost begins to change.

03 — INTEGRATION

Can AI work with the business rather than beside it? AI gains governed access to enterprise data, systems and workflows.

04 — CONTROL

Do we understand and control the AI estate? The organisation gains visibility over models, infrastructure, vendors, data and operational risk.

These stages do not always arrive neatly in sequence. A company can create measurable value before completing integration. It can integrate rapidly while creating new dependencies. That is why counting AI tools is becoming a poor proxy for maturity.

Agentic AI raises the stakes

A conventional AI assistant may answer, summarise, draft or recommend. An agentic system may increasingly be expected to retrieve, decide, update, schedule, contact, route, purchase, escalate or execute.

That difference changes the architecture required. An agent cannot meaningfully automate procurement if it cannot access supplier information. It cannot manage customer interactions without customer history. It cannot operate safely if permissions are ambiguous.

Agentic AI turns data integration from a productivity issue into an operating-model issue.

The closer AI moves to execution, the more important identity, permissions, auditability, resilience, data sovereignty and model portability become.



AI at enterprise scale increasingly depends on the physical and digital infrastructure beneath the model. Image credit: Corning GlassWorks AI.

From experimentation toward architecture

Map the AI estate

Know which models are used, where they run, what data they access, which vendors provide them and which processes depend on them.

Prioritise data accessibility

Identify the authoritative information AI actually needs and expose it safely rather than indiscriminately.

Design for portability

Where practical, separate business logic and orchestration from dependence on one model or provider.

Integrate around outcomes

Connect AI first to workflows where deeper access can create measurable business value.

Establish decision rights

Define what AI may recommend, draft, approve, communicate, modify, purchase or execute.

Measure workflow value

Track time removed, speed, conversion, cost, errors and customer outcomes — not just user counts.

Treat dependency as operational risk

If a critical workflow relies on one model, cloud or vendor, management should understand the contingency.

The next GCC AI race

The Gulf has spent several years proving that it is willing to adopt artificial intelligence. The evidence increasingly suggests that basic adoption is no longer the most interesting constraint.



The next phase of GCC AI advantage is likely to be built through depth: infrastructure, integration, governance and control. Image credit: VOLT Datacenters.

What follows is harder: connecting AI to decades of organisational information; giving it enough access to be useful without giving it too much; modernising fragmented systems; defining permissions; controlling dependencies; making models portable; measuring value; and deciding how much autonomy AI should ultimately receive.

The first phase rewarded access. The second rewarded adoption. The next will reward execution.

The GCC's next AI advantage may therefore come not from adopting more AI, but from connecting the AI it already has more deeply, securely and intelligently to the businesses it is meant to transform.

How to read this report

This report is an independent analytical synthesis by Avanti AI Labs using publicly available third-party research. Avanti AI Labs did not conduct the underlying PwC, IBM or Microsoft surveys and does not present third-party findings as proprietary Avanti data.

The terms Avanti AI Execution Gap, Wide-but-Shallow AI, Enterprise AI Last Mile and Avanti Enterprise AI Progression are analytical frameworks developed by Avanti AI Labs to interpret relationships between published findings.

Where percentages from separate studies are presented together, they are used to illuminate strategic patterns rather than imply identical samples, statistical equivalence or causality. Country comparisons are used only where the underlying source wording is sufficiently clear; Oman is explicitly marked as indicative because its published data-access wording differs from the regional measure.

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Machine-readable topic vocabulary

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