United Arab Emirates (UAE)
Cyber Security Market
The potential value of the UAE cyber security market is high

• The Middle Eastern cyber security market is valued at $23 billion.\(^1\)
• The UAE makes up 41.5 percent of Middle Eastern security software maintenance and license revenue.\(^2\)
• UAE military expenditures were estimated at $19.2 billion in 2011. \(^3\)
• IMF projected 4% GDP growth in 2013.
• The UAE is connected.
• The government has recognized the need for cyber security.
• Growth is expected to continue.
Recent developments are driving demand for cyber security in the UAE

• Attacks on government websites
• Attacks on major oil & gas companies in the region
• Investment in high tech defense platforms
• Increasing connectivity
• Establishment of the UAE Computer Emergency Response Team (aeCERT) and the National Electronic Security Authority (Nesa)
US – UAE relations support American companies engaging in the UAE cyber security market

- Bilateral defense cooperation
- US Government is assisting the UAE in addressing the threat of cyber security attacks from Iran
- US exports to the UAE (2012) = $22.5 billion (predominately high value goods)
Potential Challenges

- Requirements for local national ownership and sponsorship of businesses in the UAE.
- Offset requirements
- Personal relationship and language requirements
- Legal system
- Intellectual property rights protection
- Competition
UAE Cyber Security Market

Strengths
- Anticipated GDP and defense spending growth
- Government recognition of the need for cyber security
- Close defense relationship with USA

Weaknesses
- Limited transparency in government spending and procurement
- Conditions in government contracts

Opportunities
- Public and private sector opportunities
- Internet and data security, biometrics, infrastructure protection, user rights management

Threats
- Limitations in intellectual property rights protection
- Competition from global technology companies already engaged in the UAE market