

# **Middle East Critical Infrastructure Protection (CIP) Market - Advancements, Business Models, Technology Roadmap & Market Forecasts & Analysis (2013 – 2018)**

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## **Abstracts**

Middle East Critical Infrastructure Protection (CIP) market report constitutes the technologies and services deployed for physical and network security of key assets across the critical infrastructure market. Overall market size for Middle East Critical Infrastructure Protection (CIP) is found by adding up the market size of various technologies such as network security technologies, perimeter security technologies such as screening and scanning, video surveillance, intrusion detection and access control, and technologies such as ground based surveillance radars, CBRNE detection technologies, secure communication technologies, SCADA network security solutions and building management systems, and services such as risk management services, design, integration and consultation services, maintenance services and managed services.

Though these markets can exist independently, but the playing fields are the same. For example, there are applications of the above mentioned technologies across the verticals such as energy sector (oil and gas, thermal, nuclear, hydro, geothermal and solar), transportation sector (airports, seaports, railways, tunnels and bridges) and sensitive infrastructures (BFSI, stadiums, government monuments, holy places, manufacturing, chemical, communication systems and defence establishments) in the MEA CIP market.

Various advanced technologies and solutions such as ground based surveillance radars, building management systems, SCADA network security and intrusion detection technologies are making their way in the Middle East Critical Infrastructure Protection

(CIP) market. Security solutions such as CCTV surveillance, access control, Human Machine Interfaces (HMI) have networking capabilities wherein they are controlled using a centrally located command and control units, leading to more efficiency in the systems. Distant users can access these control systems by connecting through their local networks.

Due to the complexity in networks and the need to develop sophisticated tools to counter the emergency situation, the solution vendors need to constantly upgrade their solutions and develop new technologies. Companies are spending a large amount of money to develop these advanced technologies, thereby increasing the cost of procurement for the enterprises and government agencies. The implementation of these technologies demand heavy centralized processing units and technologies, thereby increasing the costs incurred to provide complete and fool proof protection to these infrastructures.

One challenge in protection is integrating the security technologies over a single user interface, when multiple solutions are used in the control mechanism. For example, in case of deployment of new security technologies (or in the plan to add new ones in future), the user is overburdened with learning several different interfaces. Several vendors provide invaluable frameworks that integrate and manage a wide variety of products under one interface. Such frameworks protect the assets and key infrastructures with automatic and semi-automatic solutions and tools, to detect, verify and resolve security breach events in real-time.

There are various assumptions that we have taken into consideration for market sizing and forecasting exercise. Few of the global assumptions include political, economic, social, technological and economic factors. For instance, exchange rates, one of the economic factors, are expected to have moderate rating of impact on this market. Therefore, dollar fluctuations are expected to not seriously affect the forecasts in the MEA regions.

### **The report will help the market leaders/new entrants in this market in the following ways**

This report segments the market into components and services, covering this market comprehensively. The report provides the closest approximations of the revenue numbers for the overall market and the sub-segments. The market numbers are further split across the different verticals and regions.

This report will help them better understand the competitor and gain more insights to better position their business. There is a separate section on competitive landscape, including competitor ecosystem, mergers and acquisition and venture capital funding. Besides, there are company profiles of 15 top players in this market. In this section, market internals are provided that can put them ahead of the competitors.

The report helps them understand the overall growth of the market. The report provides information on key market drivers, restraints, challenges, and opportunities.

Eminent players such as Raytheon, Thales, Siemens, Kaspersky, BAE Systems and McAfee offer better integrated security solutions in the Middle East Critical Infrastructure Protection (CIP) market.

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TABLE 107 THALES: REVENUE, 2011 – 2012 (\$MILLION)

TABLE 108 THALES: REVENUE BY SEGMENT, 2011 – 2012 (\$MILLION)

TABLE 109 THALES: REVENUE BY REGION, 2011 – 2012 (\$MILLION)





## About

Critical Infrastructure Protection (CIP) refers to the concept of a nation or region's preparedness and response to incidents involving critical infrastructures. The destruction of these vital assets could have serious effects on the economy and the social welfare of the nation. The disruption to these critical infrastructures is expected to have serious impact on the safety and security of the citizens. These vital assets are generally interdependent at multiple points thereby causing a negative impact on other assets of the same sector or across other sectors. The term CIP refers to the Critical National Infrastructure (CNI) and public assets, the policies and the methods adopted to deter or prevent attacks against them. The government and the operators of critical infrastructures/assets face common type of threats. Hence, CIP today is no more a luxury; but a practice driven by necessity. The information and the solutions needed to counter these threats/vulnerabilities vary across the verticals, given the nature of the infrastructures and type of assets.

The energy, utilities and transportation sector are highly prone to these effects due to the increasing levels of dependence on the information communication technologies or the information infrastructure. CIP other than energy and transport has a wide portfolio of applications across manufacturing and chemical industry, sensitive infrastructures such as stadiums, government facilities, banking and financial institutions, historical monuments, holy places and defense establishments.

MarketsandMarkets expects an increasing uptake of security solutions across the nations, while the investments on CIP are expected to continue across the globe. MarketsandMarkets estimates the Middle East CIP market size to grow from \$XX billion in 2013 to \$XX billion in 2018 at a CAGR of XX% from 2013 to 2018.

The table given above highlights the Middle East CIP market revenue and Y-o-Y growth from 2013 to 2018. MarketsandMarkets forecasts the CIP market revenue across the Middle East region to grow from \$XX billion in 2013 to \$1XX billion by 2018 at an estimated CAGR of XX% from 2013 to 2018.

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