

UAE Data Protection Market - Segmented By Component (Service (Professional Services, Managed Services), Solution (Data Backup & Recovery, Data Archiving & Ediscovery, Disaster Recovery, Encryption, Tokenization, Data Loss Prevention (DLP), and Others)), By Deployment Mode (Cloud, On-Premises), By Organization Size (SMEs, Large Enterprise), By End User (BFSI, Government & Defense, Retail & eCommerce, Travel & Hospitality, Healthcare & Life Sciences, Energy & Utilities, Media & Entertainment, Telecommunications & IT, and Others), By Region, By Competition, Forecast & Opportunities, 2018-2028F

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Abstracts

UAE Data Protection Market has valued at USD 3.15 Billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 16.03% through 2028. The United Arab Emirates (UAE) is experiencing a dynamic transformation in its data protection landscape, reflecting its commitment to safeguarding digital information and fostering a secure environment for businesses and individuals alike. In recent years, the UAE has made significant strides in establishing a comprehensive data protection market that aligns with global standards and addresses the challenges posed by the digital age. This burgeoning sector is marked by a combination of regulatory frameworks, technological advancements, and a growing awareness of the importance of data security. At the heart of the UAE's data protection landscape is the

implementation of the UAE Personal Data Protection Law (PDPL), which was enacted in 2020 and came into effect in 2021. This landmark legislation serves as the cornerstone for data protection efforts in the country, setting forth a robust framework for the collection, processing, and storage of personal data. The PDPL not only places obligations on data controllers and processors to protect individuals' personal information but also outlines penalties for non-compliance, reinforcing the commitment to data security.

One of the key drivers of the UAE data protection market is the increasing digitization of businesses and government services. The country's Vision 2021 and subsequent Vision 2030 initiatives have laid the foundation for a digital-first economy, prompting organizations across sectors to adopt advanced technologies and harness the power of data. As a result, there is a growing demand for comprehensive data protection solutions that can safeguard sensitive information while enabling innovation and growth. The UAE's data protection market has responded to this demand with a surge in the adoption of cutting-edge technologies. This includes the deployment of advanced encryption techniques, secure cloud storage solutions, and sophisticated access control systems. Companies operating in the UAE are increasingly turning to data protection software and services that provide real-time monitoring, threat detection, and incident response capabilities. This technological evolution not only enhances data security but also positions the UAE as a hub for cybersecurity innovation and expertise.

Furthermore, the UAE government has been proactive in promoting data protection best practices. It has introduced initiatives to raise awareness about the importance of data privacy and security among individuals and organizations. The UAE Telecommunications Regulatory Authority (TRA) plays a pivotal role in overseeing and enforcing data protection regulations, ensuring compliance across various industries. This proactive approach fosters a culture of data protection and instills confidence in businesses operating in the UAE. In addition to the regulatory framework and technological advancements, the UAE data protection market is witnessing a surge in the number of specialized cybersecurity firms and consulting services. These entities offer a wide range of solutions, including data risk assessments, compliance audits, and training programs to equip organizations with the knowledge and tools needed to navigate the complex data protection landscape. This growing ecosystem of data protection providers not only addresses the needs of local businesses but also attracts international companies seeking to expand their presence in the UAE.

Moreover, the UAE's strategic geographic location and status as a global business hub have further contributed to the growth of its data protection market. The country's robust

infrastructure and connectivity make it an attractive destination for data centers and cloud service providers looking to establish a presence in the Middle East. With data sovereignty becoming a paramount concern, the UAE's data protection laws and infrastructure provide a secure environment for hosting and managing data, attracting multinational corporations and government entities. The UAE's commitment to data protection extends beyond its borders, as it actively participates in international discussions and collaborations on cybersecurity and data privacy. This includes its engagement with organizations such as INTERPOL and the United Nations, where the UAE contributes to shaping global policies and strategies for combating cyber threats and protecting data. This international cooperation not only enhances the UAE's reputation as a responsible global player but also reinforces its commitment to upholding the highest standards of data protection.

In conclusion, the United Arab Emirates is emerging as a regional and global leader in the field of data protection. Its robust regulatory framework, rapid technological advancements, and proactive government initiatives are creating a thriving market for data protection solutions and services. As the UAE continues to position itself as a digital and economic powerhouse, the importance of data protection will remain paramount, making it a sector poised for sustained growth and innovation in the years to come. Businesses operating in or looking to enter the UAE market must recognize the significance of data protection and prioritize it as a fundamental aspect of their operations.

Key Market Drivers

Regulatory Framework and Compliance Requirements

The UAE Data Protection market is being propelled by a robust regulatory framework and stringent compliance requirements. At the heart of this drive is the UAE Personal Data Protection Law (PDPL), which came into effect in 2021. The PDPL establishes a comprehensive set of rules and guidelines governing the collection, processing, and storage of personal data. This legislation places a significant onus on organizations to ensure the security and privacy of individuals' personal information. Companies operating in the UAE are required to implement data protection measures, designate data protection officers, and report data breaches promptly. Compliance with the PDPL is not only a legal requirement but also a key factor in building trust among consumers and partners. Failure to adhere to these regulations can result in hefty fines and reputational damage. Consequently, businesses are increasingly investing in data protection solutions to ensure they meet the stringent compliance requirements. This

regulatory environment is creating a thriving market for data protection consultants, software providers, and compliance auditors, as organizations seek assistance in navigating the complexities of data protection laws and regulations.

Rapid Digital Transformation and Data Proliferation

The UAE's rapid digital transformation across various sectors is driving the demand for data protection solutions. With the government's Vision 2021 and Vision 2030 initiatives, there is a strong emphasis on digitizing government services, healthcare, finance, education, and more. This digital shift has led to a proliferation of data generated and processed by organizations. As a result, the need to secure sensitive information, including personal data, financial records, and intellectual property, has become paramount. The data protection market in the UAE is witnessing a surge in demand for technologies and services that can safeguard this burgeoning volume of digital data. Organizations are implementing encryption, access controls, and intrusion detection systems to fortify their data defenses. Moreover, the adoption of cloud computing, while enhancing operational efficiency, also necessitates robust data protection strategies, as data is increasingly stored and accessed via cloud services. Consequently, cloud security solutions and services are in high demand, further contributing to the growth of the data protection market.

Heightened Cybersecurity Threat Landscape

The UAE, like many other nations, faces a continuously evolving and increasingly sophisticated cybersecurity threat landscape. Cyberattacks, including ransomware, phishing, and data breaches, have the potential to cause significant disruptions and financial losses. The UAE government, recognizing the importance of cybersecurity, has been proactive in addressing these threats. The UAE's National Cybersecurity Strategy outlines a comprehensive approach to cybersecurity, emphasizing the importance of protecting critical infrastructure and sensitive data. To mitigate cybersecurity risks, organizations in the UAE are investing heavily in data protection solutions and services. Endpoint security, threat detection and response, and security information and event management (SIEM) solutions are seeing widespread adoption. The government also collaborates with private sector entities and international organizations to share threat intelligence and best practices. This collaborative approach to cybersecurity further stimulates the demand for advanced data protection solutions and expertise.

Growing Awareness of Data Privacy

Awareness of data privacy and the importance of personal information protection is on the rise in the UAE. Individuals are becoming more conscious of their data rights and are increasingly concerned about how their data is handled. This awareness is partly due to the PDPL, which has placed data privacy in the spotlight. Individuals now have the legal right to know how their data is being used, request access to their data, and request its deletion when no longer needed. As consumers become more privacy-conscious, organizations must prioritize data protection to maintain their reputation and build trust. This awareness-driven demand is encouraging businesses to invest in transparent data handling practices, robust consent mechanisms, and enhanced data security measures. It is also driving the adoption of data protection solutions that enable organizations to demonstrate their commitment to data privacy compliance.

Key Market Challenges

Evolving Regulatory Landscape and Compliance Burden

One of the significant challenges facing the UAE data protection market is the continuously evolving regulatory landscape and the associated compliance burden. While regulations are essential for ensuring data privacy and security, they can pose substantial challenges for organizations operating in the UAE. The UAE Personal Data Protection Law (PDPL), which came into effect in 2021, introduced comprehensive regulations governing the collection, processing, and storage of personal data. While the PDPL aligns with global data protection standards, its implementation has placed a significant compliance burden on businesses. Organizations must allocate resources to interpret and adhere to the law's requirements, which include appointing data protection officers, conducting risk assessments, and notifying authorities of data breaches.

Furthermore, as the UAE continues to enhance its data protection framework, organizations must remain vigilant about potential changes in regulations. Compliance is an ongoing process that requires continuous monitoring and adaptation to ensure that data protection practices align with current laws. Multinational companies operating in the UAE also face the challenge of navigating a complex regulatory environment that may involve compliance with multiple jurisdictions. This complexity can increase compliance costs and create operational inefficiencies.

To address this challenge, businesses in the UAE need to invest in legal and compliance expertise, as well as data protection technologies and practices that facilitate compliance. This includes implementing data protection impact assessments, establishing clear data governance frameworks, and conducting regular audits to

ensure adherence to evolving regulations. While compliance can be challenging, it also presents an opportunity for data protection solution providers to offer services and tools that assist organizations in meeting regulatory requirements.

Escalating Cybersecurity Threats and Data Breach Risks

Another critical challenge for the UAE data protection market is the escalating cybersecurity threats and the associated risk of data breaches. As digitalization accelerates across industries, cybercriminals are becoming more sophisticated in their tactics, posing a constant threat to organizations' data assets. The UAE, like many other countries, has seen a rise in cyberattacks, including ransomware attacks, phishing campaigns, and data breaches. These attacks can result in financial losses, reputational damage, and legal consequences. The consequences of a data breach are particularly severe, given the legal obligations outlined in the UAE PDPL.

Organizations are challenged to keep up with the evolving threat landscape, and it can be difficult to predict and defend against emerging cyber threats effectively. As a result, there is a growing demand for cybersecurity expertise and technologies to fortify data protection strategies. To address this challenge, organizations in the UAE must adopt a proactive approach to cybersecurity and data protection. This includes investing in robust cybersecurity solutions such as intrusion detection systems, threat intelligence platforms, and advanced firewall technologies. Additionally, implementing employee training programs to raise awareness about cybersecurity risks and best practices is crucial.

Data protection solution providers also face the challenge of developing and delivering innovative security technologies that can detect and respond to evolving threats effectively. This requires ongoing research and development efforts to stay ahead of cybercriminals and provide organizations with the tools they need to defend against attacks. Collaboration between the public and private sectors is another approach to addressing this challenge. The UAE government has actively engaged in partnerships with private sector entities to share threat intelligence and best practices, fostering a collective effort to combat cyber threats. This collaborative approach can help mitigate the risk of data breaches and strengthen the overall data protection landscape in the UAE.

Key Market Trends

Increased Adoption of Advanced Encryption and Data Masking

One prominent trend in the UAE Data Protection market is the increased adoption of advanced encryption and data masking techniques. With data breaches and cyber threats on the rise, organizations are recognizing the need to protect their sensitive information at rest, in transit, and during processing. Encryption is becoming a fundamental component of data protection strategies. In response to this trend, data protection solution providers in the UAE are offering cutting-edge encryption technologies that go beyond traditional methods. Modern encryption solutions encompass end-to-end encryption for data in transit, robust encryption for data stored in databases and cloud environments, and even homomorphic encryption for secure data processing without exposing sensitive information.

Data masking is another technique gaining traction in the UAE market. It involves the transformation of sensitive data into a non-sensitive format while preserving its original format and structure. This allows organizations to share data for legitimate purposes without revealing confidential information. The combination of encryption and data masking helps organizations maintain data privacy and security, especially in scenarios involving third-party data sharing and cloud-based data storage. The growth of encryption and data masking solutions is driven by both regulatory compliance requirements and the proactive stance that organizations are taking to secure their data. As the UAE government continues to emphasize data protection through legislation like the UAE PDPL, businesses are investing in technologies that not only safeguard sensitive data but also help them achieve compliance.

Rising Demand for Cloud Data Protection Solutions

Another significant trend in the UAE Data Protection market is the increasing demand for cloud data protection solutions. As organizations in the UAE embrace cloud computing and migrate their data and applications to cloud platforms, there is a growing need to secure data in the cloud environment. Cloud adoption is driven by its scalability, cost-efficiency, and flexibility, but it also introduces unique security challenges. To address these challenges, businesses are turning to cloud data protection solutions that offer a range of features, including data encryption, access controls, threat detection, and data loss prevention (DLP) mechanisms. These solutions provide organizations with the ability to protect their data, maintain control over access, and monitor unauthorized activities in the cloud.

The UAE government's efforts to establish the country as a regional cloud services hub further accelerate this trend. The introduction of secure and compliant cloud services

encourages organizations to migrate their data and operations to cloud platforms. However, this migration also necessitates robust cloud data protection measures to ensure data confidentiality and integrity. In response, cloud service providers in the UAE are enhancing their security offerings, implementing strict data residency and compliance policies, and partnering with data protection solution providers to deliver comprehensive cloud security solutions. As a result, the market for cloud data protection solutions is witnessing substantial growth, aligning with the broader trend of cloud adoption across industries.

Convergence of Data Protection and Cybersecurity

The convergence of data protection and cybersecurity is a notable trend in the UAE Data Protection market. Historically, these two domains were seen as separate, with data protection focusing on safeguarding data assets and cybersecurity primarily concerned with defending against external threats. However, the evolving threat landscape and the increasing value of data have led to a blurring of the lines between these disciplines. Organizations in the UAE are recognizing that an effective data protection strategy is inseparable from a robust cybersecurity posture. Data breaches often result from cyberattacks, making it imperative to integrate data protection measures with cybersecurity controls. This convergence involves implementing technologies and practices that not only secure data but also actively defend against threats and vulnerabilities.

As a result, data protection solution providers are incorporating cybersecurity features such as advanced threat detection, security information and event management (SIEM) integration, and identity and access management (IAM) into their offerings. This holistic approach to data security not only enhances an organization's ability to protect sensitive information but also streamlines security operations and incident response. Furthermore, the UAE government's proactive stance on cybersecurity encourages this trend. By fostering collaboration between data protection and cybersecurity experts, organizations can establish comprehensive security postures that encompass both data and network security. This trend is expected to continue evolving as the threat landscape evolves, making it imperative for businesses in the UAE to adopt integrated data protection and cybersecurity strategies to safeguard their digital assets effectively.

Segmental Insights

Solution Type Insights

Based on solutions, the disaster recovery type segment has established its dominance in the UAE data protection market and is projected to maintain this position throughout the forecast period. This dominance can be attributed to several factors. First and foremost, the UAE's geographical location in a region prone to various natural disasters and its thriving business landscape make disaster recovery solutions a top priority for organizations seeking to safeguard their critical data and ensure business continuity. Moreover, the increasing volume of data generated by businesses, coupled with the escalating threat of cyberattacks and data breaches, has elevated the importance of robust disaster recovery strategies. Organizations recognize that downtime can result in substantial financial losses and reputational damage, making disaster recovery solutions indispensable. As a result, the demand for comprehensive and reliable disaster recovery solutions continues to grow, solidifying this segment's leadership in the UAE data protection market.

End User Type Insights

Based on end user, the healthcare & life sciences segment in UAE data protection market is expected to register fastest growth during the forecast period. This accelerated growth can be attributed to several key factors. Firstly, the healthcare and life sciences sectors in the UAE are undergoing a significant digital transformation, adopting electronic health records (EHRs) and advanced medical imaging technologies, resulting in a substantial increase in sensitive patient data. As the importance of patient privacy and data security becomes paramount, healthcare organizations are increasingly investing in robust data protection solutions to ensure compliance with stringent data privacy regulations and safeguard patient information from cyber threats. Secondly, the global health crisis, such as the COVID-19 pandemic, has further accelerated the adoption of digital healthcare solutions in the UAE. Telemedicine, remote monitoring, and cloud-based healthcare platforms have become essential tools, necessitating enhanced data protection measures to secure patient data transmitted and stored in these digital ecosystems. This surge in healthcare digitization has created a strong demand for data protection solutions tailored to the unique needs of the healthcare and life sciences sector. Lastly, as healthcare organizations in the UAE increasingly recognize the critical role of data analytics and artificial intelligence in improving patient care and driving medical research, there is a growing need to protect and harness the value of healthcare data. This entails not only safeguarding data against breaches but also ensuring its availability and integrity for critical decision-making processes.

Regional Insights

The Abu Dhabi region has established itself as the leader in the UAE data protection market with a significant revenue share. This dominance can be attributed to a convergence of several compelling factors. Firstly, Abu Dhabi is the capital of the United Arab Emirates and serves as the epicenter of the nation's political, economic, and administrative activities. The presence of key government institutions and ministries underscores the critical importance of data protection, especially for securing sensitive government data and information, which drives the demand for robust data protection solutions. Furthermore, Abu Dhabi has emerged as a thriving global business hub, attracting a multitude of multinational corporations, financial institutions, and prominent conglomerates. These organizations handle vast volumes of sensitive data, from financial records to customer information, necessitating rigorous data protection measures to mitigate risks and ensure compliance with data privacy regulations. The awareness of the potentially severe consequences of data breaches, both in terms of financial losses and reputational damage, has propelled these entities to invest significantly in cutting-edge data protection technologies and services.

Additionally, Abu Dhabi's strategic position in sectors such as energy, aviation, and critical infrastructure reinforces the emphasis on data protection. Protecting valuable intellectual property and sensitive operational data is imperative in these industries, amplifying the demand for state-of-the-art data protection solutions. This convergence of factors firmly cements Abu Dhabi's leadership position in the UAE data protection market, a role that is expected to persist as data security remains a paramount concern in today's digital landscape.

Key Market Players

G4S Secure Solutions (UAE) LLC

Etisalat Trustwave FZ-LLC

IBM Middle East FZ-LLC

Microsoft Gulf FZ-LLC

Dell Technologies FZE

HP Inc. Middle East (FZ-LLC)

Cisco Systems Middle East FZE

Palo Alto Networks Middle East FZE

Symantec Gulf FZ-LLC

Sophos Middle East FZ-LLC

Report Scope:

In this report, the UAE Data Protection market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

UAE Data Protection Market, By Component:

Service

Professional Services

Managed Services

Solution

Data Backup & Recovery

Data Archiving & eDiscovery

Disaster Recovery

Encryption

Tokenization

Data Loss Prevention (DLP)

Other

UAE Data Protection Market, By Deployment Mode:

Cloud

On-Premises

UAE Data Protection Market, By Organization Size:

SMEs

Large Enterprise

UAE Data Protection Market, By End User:

BFSI

Government & Defense

Retail and eCommerce

Travel and Hospitality

Healthcare and Life Sciences

Energy and Utilities

Media and Entertainment

Travel and Hospitality

Telecommunications and IT

Others

UAE Data Protection Market, By Region:

Dubai

Sharjah

Abu Dhabi

Rest of UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the UAE Data Protection Market.

Available Customizations:

UAE Data Protection market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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