

UAE Internet of Things (IoT) Market Segmented by Component (Hardware, Software, and Services), By Platform (Device Management, Application Management, Network Management, Data Management, and Others), By Application (Consumer Electronics, Smart Mobility & Transportation, Building & Home Automation, Connected Logistics, Smart Retail, and Others), By Region, Competition, Forecast and Opportunities, 2018-2028F

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Abstracts

The UAE Internet of Things (IoT) market was valued at USD 20.76 billion and is anticipated to project robust growth in the forecast period with a CAGR of 17.31% during the forecast period. The United Arab Emirates (UAE) has emerged as a dynamic and rapidly growing hub for the Internet of Things (IoT) market. With its visionary leadership and a strong focus on technological innovation, the UAE has positioned itself at the forefront of IoT adoption in the Middle East. This burgeoning market is witnessing exponential growth, driven by a confluence of factors such as government initiatives, smart city projects, a burgeoning startup ecosystem, and an increasingly tech-savvy population. One of the key driving forces behind the UAE's IoT market growth is the unwavering support and commitment from the government. The UAE leadership, particularly in Dubai and Abu Dhabi, has embarked on ambitious smart city initiatives that leverage IoT technologies to enhance urban living. Dubai's "Smart Dubai" and Abu Dhabi's "Smart City" initiatives have introduced a multitude of IoT applications, ranging from smart traffic management systems to connected healthcare solutions. These initiatives not only improve the quality of life for residents but also serve as a testament to the UAE's commitment to becoming a global technology leader.

Furthermore, the UAE government has established regulatory frameworks and policies that encourage IoT adoption and innovation. The Telecommunications Regulatory Authority (TRA) has been actively involved in promoting IoT standards and ensuring the security and privacy of IoT devices and data. Such regulatory support provides a conducive environment for businesses to invest in IoT solutions with confidence, knowing that their operations are following established guidelines. The thriving startup ecosystem in the UAE has also played a pivotal role in the IoT market's growth. The government, through various initiatives like Dubai Future Accelerators and Abu Dhabi's Hub71, has nurtured startups specializing in IoT technologies. These startups are working on cutting-edge solutions across industries such as agriculture, healthcare, logistics, and transportation. Their innovations are not only addressing local challenges but are also gaining recognition on the global stage, positioning the UAE as a hotbed of IoT entrepreneurship.

In addition to government support and startups, the UAE's IoT market benefits from a tech-savvy population that is increasingly open to embracing IoT solutions. The country boasts one of the highest smartphone penetration rates in the world, and consumers are actively adopting smart home devices, wearables, and connected appliances. This consumer readiness to embrace IoT technologies has created a fertile ground for businesses to introduce new products and services. The applications of IoT in the UAE are diverse and multifaceted. In the realm of transportation and logistics, IoT-enabled solutions are optimizing routes, enhancing fleet management, and reducing fuel consumption. This not only leads to cost savings but also contributes to the country's sustainability goals. Similarly, in the healthcare sector, IoT devices are improving patient care through remote monitoring, telemedicine, and the efficient management of medical equipment and supplies. These advancements are particularly valuable in a world where healthcare delivery is becoming increasingly digital.

The agriculture sector in the UAE is also benefiting from IoT technologies, as precision farming techniques are being deployed to conserve water, optimize crop yields, and ensure food security in a resource-scarce environment. This aligns with the country's strategic goal of achieving food self-sufficiency and reducing dependency on food imports. Moreover, IoT is reshaping the energy sector in the UAE. Smart grids and energy management systems are helping utilities optimize energy distribution, reduce losses, and integrate renewable energy sources into the grid. This not only contributes to sustainability efforts but also ensures a reliable and efficient energy supply for both residential and industrial consumers. Another fascinating aspect of the UAE's IoT market is its commitment to innovation in the field of artificial intelligence (AI) and

robotics. AI-powered IoT solutions are being deployed in various sectors, including customer service, where virtual assistants and chatbots are revolutionizing the way businesses interact with customers. These AI-driven IoT applications enhance efficiency, reduce operational costs, and provide a seamless customer experience.

The future of the UAE's IoT market looks exceptionally promising, with continued growth anticipated in various domains. The proliferation of 5G networks will further accelerate IoT adoption by providing faster and more reliable connectivity, enabling real-time data transmission and analysis. This will be particularly beneficial for applications that require low latency, such as autonomous vehicles and industrial automation. Furthermore, the UAE's ambition to explore space through projects like the Mars Mission and its focus on sustainability through initiatives like the Green New Deal underline the nation's commitment to pushing the boundaries of technology and innovation. IoT will undoubtedly play a crucial role in these endeavors, from monitoring the environment to optimizing resource utilization.

In conclusion, the United Arab Emirates is rapidly emerging as a leading player in the global IoT market. The government's unwavering support, a vibrant startup ecosystem, and a tech-savvy population are driving IoT adoption across various sectors, from smart cities to healthcare, agriculture, and energy. With its focus on innovation and sustainability, the UAE is poised to continue its remarkable journey as a frontrunner on the Internet of Things, setting an example for the world in harnessing the power of IoT to improve lives and drive economic growth.

Key Market Drivers

Government Initiatives and Smart City Projects

The United Arab Emirates (UAE) has been at the forefront of adopting and promoting the Internet of Things (IoT) as a key driver of its economic and technological growth. One of the primary market drivers in the UAE's IoT landscape is the extensive support and investments made by the government in various IoT initiatives and smart city projects. The UAE government has recognized the transformative potential of IoT in enhancing the quality of life for its citizens and improving the overall efficiency of public services. To this end, it has launched several ambitious smart city initiatives, such as Dubai's Smart City project and Abu Dhabi's Vision 2030. These initiatives encompass various IoT applications, including smart transportation, energy management, healthcare, and public safety.

Moreover, the government has introduced regulatory frameworks and policies to encourage IoT adoption across industries. This includes initiatives like the Dubai IoT Strategy, which aims to position Dubai as a global IoT leader by fostering collaboration between government entities, private sector companies, and startups. The government's active involvement and investment in IoT projects serve as a significant market driver, creating a favorable environment for IoT technology providers and fostering innovation in the sector.

Growing Demand for Industrial IoT (IIoT)

The UAE's economy has evolved significantly in recent years, with a strong focus on diversification beyond oil and gas. Industries such as manufacturing, logistics, and healthcare have experienced substantial growth. As these sectors seek greater operational efficiency and productivity, there is a growing demand for Industrial IoT (IIoT) solutions. IIoT enables companies to connect and monitor their machinery, equipment, and processes in real-time. This connectivity allows for predictive maintenance, reduced downtime, and improved asset utilization. Given the UAE's position as a regional hub for trade and manufacturing, the adoption of IIoT is crucial for maintaining competitiveness. The UAE's commitment to becoming a global logistics and trade hub, as evident in the development of major ports and airports, further fuels the demand for IIoT solutions. Logistics companies are increasingly deploying IoT technologies to optimize supply chain operations, track shipments, and enhance security. The rising adoption of IIoT in key industries positions it as a strong market driver, with significant growth potential in the UAE's IoT market.

Digital Transformation in Healthcare

Healthcare is another sector where IoT is making substantial inroads in the UAE. The government has prioritized healthcare as part of its Vision 2030 strategy, aiming to provide high-quality healthcare services to its citizens and residents. IoT plays a pivotal role in this endeavor by enabling the creation of smart healthcare ecosystems. IoT devices and sensors are used for remote patient monitoring, allowing healthcare providers to track vital signs and health parameters in real-time. This not only enhances the quality of care but also reduces the burden on healthcare facilities.

Moreover, IoT solutions are being deployed in healthcare facilities for asset tracking, inventory management, and the optimization of medical equipment usage. The implementation of Electronic Health Records (EHRs) and telemedicine services is further driving the digital transformation of the healthcare sector. The COVID-19

pandemic has accelerated the adoption of telemedicine and remote patient monitoring solutions, highlighting the importance of IoT in healthcare. As the UAE continues to invest in healthcare infrastructure and digital transformation, the IoT healthcare market is poised for significant growth.

Energy Efficiency and Sustainability

Energy efficiency and sustainability are critical concerns in the UAE, given its hot climate and energy-intensive industries. IoT technologies are playing a vital role in addressing these challenges and are thus emerging as key market drivers. Building management systems that leverage IoT sensors and controls are widely adopted in the UAE to optimize energy usage in commercial and residential buildings. These systems enable real-time monitoring and adjustments to lighting, HVAC, and other energy-consuming systems, leading to substantial energy savings. Additionally, IoT is integral to the deployment of smart grids and renewable energy solutions in the UAE. The country has ambitious goals for increasing its renewable energy capacity, and IoT plays a crucial role in managing and optimizing these resources efficiently.

Key Market Challenges

Security and Privacy Concerns in the UAE IoT Market

The United Arab Emirates (UAE) has witnessed rapid growth on the Internet of Things (IoT) market in recent years, with a plethora of applications spanning various industries such as smart cities, healthcare, agriculture, and logistics. While IoT promises significant advancements and efficiencies, it also brings forth various challenges, with security and privacy concerns being paramount in the UAE IoT market. One of the primary challenges facing the UAE IoT market is the vulnerability of IoT devices and networks to cyberattacks. As IoT devices collect and transmit vast amounts of sensitive data, they become attractive targets for malicious actors seeking to exploit vulnerabilities. Security breaches can have dire consequences, including data theft, system manipulation, and service disruption. In the context of the UAE, which is heavily reliant on IoT for its ambitious smart city initiatives and critical infrastructure, a successful cyberattack could lead to significant economic and societal disruptions.

Addressing security challenges in the UAE IoT market requires a multifaceted approach. Manufacturers must prioritize security in IoT device design and implementation, incorporating robust encryption, authentication mechanisms, and regular firmware updates. Organizations and government bodies need to enforce

stringent cybersecurity standards and regulations to ensure that IoT deployments meet security benchmarks. Additionally, raising awareness among end-users about the importance of securing IoT devices and networks is crucial. Privacy concerns are another significant challenge in the UAE IoT market. With the proliferation of IoT devices, there is a growing concern about the collection and utilization of personal data without individuals' consent. Many IoT applications involve the continuous monitoring of individuals' activities and behaviors, raising questions about data ownership, consent, and the potential for misuse.

Interoperability and Standardization in the UAE IoT Market

The United Arab Emirates (UAE) has made substantial investments in the Internet of Things (IoT) market, aiming to transform various industries through connected devices and smart technologies. While IoT offers immense potential, one of the notable challenges facing the UAE IoT market is interoperability and standardization. Interoperability refers to the ability of different IoT devices, systems, and platforms to work seamlessly together, enabling data exchange and cooperation. In the UAE, as in many other regions, the IoT landscape is characterized by a diverse range of devices and solutions, often developed by different manufacturers. This diversity can lead to compatibility issues, making it difficult for these devices to communicate and collaborate effectively.

The absence of widely accepted IoT standards exacerbates interoperability challenges. Different manufacturers often use proprietary protocols and technologies, creating silos that hinder the integration of IoT systems. As a result, organizations may face difficulties when trying to build comprehensive IoT solutions that incorporate devices from multiple vendors. Addressing interoperability challenges in the UAE IoT market requires the development and adoption of industry-wide standards. Industry consortia, regulatory bodies, and governmental agencies must work together to define common protocols and communication standards that facilitate interoperability. Standardization efforts should encompass various aspects of IoT, including communication protocols, data formats, and security measures.

Key Market Trends

Smart Cities and Infrastructure Development in the UAE IoT Market

The United Arab Emirates (UAE) has been at the forefront of adopting and implementing Internet of Things (IoT) technologies to create smarter and more efficient

cities. The trend toward developing smart cities and infrastructure in the UAE's IoT market is gaining significant momentum. Smart cities leverage IoT devices and sensors to collect and analyse data from various sources, including transportation, energy, public safety, and healthcare, with the goal of improving urban living conditions and sustainability. In the UAE, cities like Dubai and Abu Dhabi have embarked on ambitious smart city initiatives, incorporating IoT technologies to enhance infrastructure and services.

One notable trend within the UAE's smart city development is the integration of IoT in transportation systems. This includes the deployment of smart traffic management systems, connected public transportation options, and the promotion of electric and autonomous vehicles. These initiatives aim to reduce traffic congestion, lower emissions, and enhance the overall mobility experience for residents and visitors. IoT is also playing a crucial role in optimizing energy usage in the UAE's smart cities. Smart grids and smart meters enable real-time monitoring of electricity consumption, allowing for more efficient distribution and reducing wastage. Additionally, IoT sensors are being used to control street lighting, adjusting brightness based on the presence of pedestrians and vehicles, further contributing to energy conservation.

Industrial IoT (IIoT) Transformation in the UAE

The Industrial Internet of Things (IIoT) is reshaping industries across the globe, and the UAE is no exception. A significant trend in the UAE's IoT market is the widespread adoption of IIoT solutions to drive efficiency, productivity, and competitiveness across various industrial sectors. One prominent area where IIoT is making a significant impact in the UAE is manufacturing. Manufacturers are increasingly deploying IoT sensors and connectivity to monitor machinery and production processes in real time. This enables predictive maintenance, reducing downtime and lowering maintenance costs. Furthermore, data collected from IIoT devices can be used for process optimization, quality control, and supply chain management.

In the oil and gas sector, which is a cornerstone of the UAE's economy, IIoT plays a pivotal role in optimizing exploration, production, and distribution processes. IoT sensors and devices are used to monitor equipment health, track asset locations, and enhance safety through real-time data analytics. Additionally, the integration of IIoT solutions has improved energy efficiency and environmental sustainability in the oil and gas industry. Logistics and supply chain management is another sector experiencing a transformation due to IIoT adoption. In the UAE, with its strategic location as a global logistics hub, IoT-enabled solutions are used to track shipments, monitor temperature-

sensitive cargo, and optimize route planning. These advancements not only improve the efficiency of logistics operations but also enhance transparency and traceability, which is crucial in the global trade environment.

IoT in Healthcare and Telemedicine

The Internet of Things (IoT) is making significant inroads into the healthcare sector in the United Arab Emirates (UAE), with a notable trend being the integration of IoT technologies into healthcare systems and the expansion of telemedicine services. IoT in Healthcare: IoT devices and sensors are being increasingly utilized in healthcare facilities to monitor patient health, improve the efficiency of healthcare delivery, and enhance patient outcomes. Wearable devices, such as smartwatches and fitness trackers, are becoming popular tools for tracking vital signs and activity levels. In addition to remote patient monitoring, IoT is used for asset tracking, managing medical equipment, and ensuring medication adherence. For example, RFID (Radio-Frequency Identification) tags are employed to track the location and usage of medical supplies, reducing waste, and ensuring timely replenishment.

Telemedicine Expansion: The COVID-19 pandemic accelerated the adoption of telemedicine worldwide, and the UAE is no exception. Telehealth services, enabled by IoT technologies, have become a fundamental part of healthcare delivery in the UAE. Patients can now consult with healthcare professionals remotely, reducing the need for in-person visits, which is particularly important during health crises. IoT devices play a vital role in telemedicine, allowing patients to measure and transmit vital signs, such as blood pressure, heart rate, and blood glucose levels, to healthcare providers in real time. This data facilitates remote diagnosis and treatment adjustments.

Remote Patient Monitoring: IoT-based remote patient monitoring solutions are gaining traction in the UAE's healthcare sector. These solutions involve the use of IoT devices to continuously collect and transmit patient data to healthcare providers. Patients with chronic conditions, such as diabetes or hypertension, can benefit from personalized care plans and timely interventions based on the data collected by IoT devices. This trend aligns with the UAE government's commitment to providing quality healthcare services and improving patient outcomes.

Data Security and Compliance: As healthcare data becomes more interconnected through IoT devices and telemedicine platforms, data security

and privacy are paramount concerns. The UAE has introduced data protection regulations, including the UAE Personal Data Protection Law, to safeguard patient information. Ensuring the secure transmission and storage of healthcare data is crucial for maintaining trust in IoT-driven healthcare services.

Collaboration and Investment: The UAE government is actively promoting innovation in healthcare technology, including IoT. Partnerships between public and private sectors, research institutions, and technology companies are fostering the development of healthcare IoT solutions. Investment in healthcare technology startups is also on the rise, further driving innovation in this space.

Segmental Insights

Platform Insights

Based on platform, the application management segment emerges as the predominant segment in the UAE Internet of Things (IoT) market, exhibiting unwavering dominance projected throughout the forecast period. This enduring dominance can be attributed to several compelling factors. Firstly, application management platforms are instrumental in orchestrating and optimizing the diverse array of IoT applications and services that proliferate across industries such as smart cities, healthcare, and logistics in the UAE. These platforms offer centralized control, monitoring, and customization capabilities, ensuring that IoT solutions operate seamlessly and efficiently. Additionally, as the UAE continues its pursuit of digital transformation and smart city initiatives, the demand for sophisticated application management platforms grows, as they facilitate the integration of new IoT solutions with existing infrastructure. Furthermore, the ability to tailor and fine-tune IoT applications to meet the specific needs of various sectors is a key driver of the application management segment's dominance. As the UAE's IoT ecosystem expands and evolves, the application management segment remains central to shaping the trajectory and realizing the full potential of IoT technologies in the country.

Application Insights

Based on application, the consumer electronics segment in the UAE Internet of Things (IoT) market emerges as a formidable frontrunner, exerting its dominance and shaping the market's trajectory throughout the forecast period. This dominance of the consumer electronics sector can be attributed to several key factors. Firstly, the UAE is renowned for its tech-savvy and digitally connected population, driving a strong demand for IoT-

enabled consumer electronics such as smart home devices, wearable technology, and connected appliances. This trend is further accelerated by the growing emphasis on convenience, energy efficiency, and enhanced living standards among consumers in the UAE. Additionally, the rapid proliferation of smartphones and the increasing integration of IoT features in mobile devices have opened new opportunities for consumer electronics companies to offer innovative and interconnected solutions. As the consumer electronics segment continues to innovate and cater to the evolving needs of UAE consumers, its dominance in the IoT market is expected to persist, making it a pivotal force in shaping the future of IoT adoption and lifestyle enhancements in the country.

Regional Insights

Abu Dhabi Region firmly establishes itself as a commanding presence within the UAE Internet of Things (IoT) market, affirming its preeminent position, and highlighting its pivotal role in shaping the industry's course. Abu Dhabi's ascendancy in the IoT landscape can be attributed to a combination of visionary leadership, substantial investments, and a clear commitment to technological advancement. As the capital of the UAE, Abu Dhabi has set the bar high by embarking on ambitious smart city projects and comprehensive digital transformation initiatives. These endeavors encompass various sectors, from transportation and infrastructure to healthcare and energy management, all of which are deeply intertwined with IoT technologies. The region's robust infrastructure, progressive regulatory environment, and collaborative ecosystem for technology innovation have attracted both local and international IoT stakeholders. With a relentless focus on harnessing IoT's potential for enhancing quality of life, sustainability, and efficiency, Abu Dhabi has emerged as a powerhouse, charting the course for IoT's evolution not just in the region but on a global scale. Its unwavering commitment to innovation ensures that Abu Dhabi will continue to lead the way in shaping the future of the IoT industry in the UAE and beyond.

Key Market Players

Etisalat Group Company PJSC

Du Telecommunications Corporation

Huawei Technologies UAE FZ-LLC

IBM Middle East FZ LLC

Microsoft Gulf FZ LLC

Cisco Systems FZE

SAP FZE

Siemens Middle East LLC

GE Digital Middle East

Oracle United Arab Emirates

Report Scope:

In this report, the UAE Internet of Things (IoT) market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

UAE Internet of Things (IoT) Market, By Component:

Hardware

Software

Services

UAE Internet of Things (IoT) Market, By Platform:

Device Management

Application Management

Network Management

Data Management

Others

UAE Internet of Things (IoT) Market, By Application:

Consumer Electronics

Smart Mobility & Transportation

Building & Home Automation

Connected Logistics

Smart Retail

Others

UAE Internet of Things (IoT) Market, By Region:

Dubai

Sharjah

Abu Dhabi

Rest of UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the UAE Internet of Things (IoT) Market.

Available Customizations:

UAE Internet of Things (IoT) 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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