

UAE Managed Security Services by Market Security Type (Managed Intrusion Detection System (IDS)/Managed Intrusion Prevention System (IPS), Security Information & Event Management, Managed Firewall, Unified Threat Management, Others), By Deployment Type (On-Premise, Cloud), By Organization Size (SME's, Large Enterprise), By End User (Government, BFSI, IT & Telecom, Manufacturing & Natural Resources, and Others), By Region, By Competition, Forecast & Opportunities, 2018-2028F

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Abstracts

UAE managed security services market has valued at USD 484.75 million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 13.64% through 2028. The United Arab Emirates (UAE) Managed Security Services (MSS) market is undergoing a profound transformation driven by a combination of factors that underscore the critical role of cybersecurity in the nation's rapidly advancing digital landscape. As a country known for its remarkable technological advancements and as a global business and financial hub, the UAE has become a prime target for cyber threats. Consequently, the demand for MSS providers offering comprehensive and proactive cybersecurity solutions has surged, making the UAE's MSS market one of the most dynamic and promising in the region. One of the primary catalysts fueling the growth of the MSS market in the UAE is the relentless expansion and sophistication of the cyber threat landscape. The UAE's extensive reliance on digital technologies across various sectors, including finance, healthcare, energy, and government services, has made it an attractive target for a wide range of cybercriminals, from financially motivated hackers to

state-sponsored threat actors. These adversaries continuously seek vulnerabilities and security gaps to exploit for financial gain, data theft, and disruptive attacks. In response to these evolving threats, organizations in the UAE are increasingly turning to MSS providers to fortify their defenses. MSS providers offer a suite of services that include continuous security monitoring, threat detection, and rapid incident response to safeguard sensitive data, intellectual property, and critical infrastructure from cyberattacks.

Moreover, the regulatory landscape in the UAE is playing a pivotal role in shaping the MSS market. The UAE government has recognized the urgency of enhancing cybersecurity measures and has implemented stringent regulations to ensure data protection and cybersecurity compliance. Notable among these is the UAE's Cybersecurity Law, which outlines requirements for organizations to safeguard their digital assets and report security incidents. This regulatory framework has propelled organizations to prioritize cybersecurity and seek MSS providers to ensure compliance and robust protection against cyber threats. MSS providers are now instrumental partners in helping UAE-based businesses align with these evolving legal mandates, combining their expertise with cutting-edge technologies to provide the necessary security measures while navigating complex regulatory terrain.

Furthermore, the COVID-19 pandemic has accelerated digital transformation efforts in the UAE, pushing organizations to adopt remote work and cloud-based technologies at an unprecedented pace. While these digital initiatives offer operational flexibility and efficiency gains, they have also introduced new security challenges by expanding the attack surface. The rapid shift to remote work and the increased reliance on cloud infrastructure have made it imperative for organizations to secure endpoints, protect sensitive data, and ensure the resilience of their digital operations. MSS providers in the UAE have adapted to these trends by offering specialized services tailored to secure remote work environments, provide robust cloud security, and address the unique cybersecurity challenges posed by digital transformation.

In addition to addressing these challenges, the MSS landscape in the UAE is witnessing a shift towards a more holistic approach to cybersecurity. Organizations are no longer satisfied with basic security monitoring; they are seeking MSS providers who can offer a comprehensive array of services, encompassing threat intelligence, vulnerability management, incident response, and compliance assurance. This shift is driven by the recognition that cybersecurity is not just a cost center but a strategic investment that can protect an organization's reputation, financial stability, and customer trust. UAE organizations are increasingly looking for MSS providers who can deliver tailored, end-

to-end security solutions that address their specific needs and align with their strategic objectives. Furthermore, the competitive landscape of the MSS market in the UAE is evolving rapidly. Both domestic and international MSS providers are vying for market share by offering innovative solutions and value-added services. This competition is driving innovation in the industry, resulting in better security outcomes for businesses. MSS providers in the UAE are continuously enhancing their offerings, incorporating emerging technologies such as artificial intelligence and machine learning to bolster threat detection and response capabilities. They are also collaborating with industry partners and government agencies to share threat intelligence and strengthen the collective cybersecurity posture of the nation.

In conclusion, the Managed Security Services market in the UAE is experiencing robust growth driven by the evolving threat landscape, regulatory pressures, technological advancements, and the changing business landscape. As the UAE continues to lead the way in digitalization and technological innovation, the role of MSS providers in safeguarding digital assets and ensuring regulatory compliance will become even more critical. This dynamic and competitive environment presents opportunities for MSS providers to differentiate themselves by offering comprehensive, proactive, and adaptable security solutions that cater to the evolving needs of businesses across various sectors in the UAE. The MSS market in the UAE is poised for sustained expansion as it adapts to the evolving threat landscape and continues to provide essential cybersecurity services in a digitally connected world.

Key Market Drivers

Escalating Cyber Threat Landscape

The Managed Security Services (MSS) market in the United Arab Emirates (UAE) is experiencing robust growth, driven primarily by the relentless expansion of the cyber threat landscape. The UAE's rapid digital transformation and status as a global business and financial hub have made it an attractive target for cyber adversaries. The increasing frequency, sophistication, and diversity of cyberattacks have underscored the critical need for robust cybersecurity measures. As a result, there has been a surge in the demand for MSS providers capable of offering comprehensive security solutions tailored to safeguard critical assets, sensitive data, and essential infrastructure from cyber threats. This escalating cyber threat landscape encompasses a wide range of risks, from financially motivated cybercriminals seeking to exploit vulnerabilities for financial gain to state-sponsored threat actors with geopolitical agendas. These adversaries continuously evolve their tactics, techniques, and procedures, posing

significant challenges to organizations in the UAE. MSS providers are stepping in to address these challenges by providing services such as 24/7 security monitoring, threat detection, incident response, and vulnerability management. Their expertise and technology are crucial for mitigating the risks posed by cyberattacks and ensuring the security and resilience of organizations in the UAE.

Regulatory Compliance Imperatives

One of the driving forces shaping the MSS market in the UAE is the regulatory landscape and compliance imperatives. The UAE government recognizes the critical importance of enhancing cybersecurity measures to protect digital assets, sensitive data, and national security. To this end, the UAE has implemented stringent regulations, including the UAE Cybersecurity Law, which outlines comprehensive requirements for organizations to safeguard their digital operations and report security incidents. These regulatory frameworks compel organizations in the UAE to prioritize cybersecurity and align their security measures with legal mandates. MSS providers play a pivotal role in assisting businesses in navigating the complex landscape of compliance. They offer services such as security assessments, policy development, and security auditing to ensure that organizations meet regulatory requirements. This partnership between organizations and MSS providers is crucial for addressing not only the evolving threat landscape but also the legal and regulatory complexities that come with it.

Rapid Digital Transformation and Remote Work Trends

The third significant driver of the MSS market in the UAE is the rapid pace of digital transformation and the paradigm shift towards remote work arrangements. The COVID-19 pandemic accelerated the adoption of digital technologies, compelling organizations to embrace remote work, cloud computing, and other digital initiatives at an unprecedented rate. While these digital transformations offer operational efficiency and flexibility, they also introduce new security challenges. Remote work, in particular, has expanded the attack surface for cyber adversaries, making it imperative for organizations to secure remote endpoints, protect sensitive data, and ensure business continuity. MSS providers in the UAE have adapted to these trends by offering specialized services tailored to secure remote work environments and provide robust cloud security. They help organizations navigate the unique cybersecurity challenges posed by digital transformation while enabling them to harness the benefits of these technologies securely.

Holistic Approach to Cybersecurity

The fourth key driver shaping the MSS market in the UAE is the growing recognition among organizations that cybersecurity requires a holistic approach. Businesses are no longer content with basic security monitoring; they are seeking MSS providers capable of offering a comprehensive suite of services. This includes threat intelligence, vulnerability management, incident response, and compliance assurance. This shift is driven by the understanding that cybersecurity is not just a cost center but a strategic investment capable of protecting an organization's reputation, financial stability, and customer trust. UAE organizations are increasingly seeking MSS providers who can deliver tailored, end-to-end security solutions that address their specific needs and align with their strategic objectives. MSS providers in the UAE are responding to this demand by expanding their service portfolios to offer a holistic approach to cybersecurity. They integrate advanced technologies such as artificial intelligence and machine learning to enhance threat detection and response capabilities. Additionally, they collaborate with industry partners and government agencies to share threat intelligence and strengthen the collective cybersecurity posture of the nation. This holistic approach to cybersecurity is pivotal for organizations in the UAE to stay resilient against evolving cyber threats and is a significant driver of growth in the MSS market. growth.

Key Market Challenges

Rapid Technological Advancements and Cyber Threat Evolution

The UAE Managed Security Services (MSS) market is experiencing significant growth, driven by the increasing digitalization of businesses and the adoption of advanced technologies. While this growth presents immense opportunities, it also comes with a set of daunting challenges. One of the foremost challenges in the UAE MSS market is the rapid pace of technological advancements and the simultaneous evolution of cyber threats. **Technological Advancements:** The UAE is known for its fast-paced adoption of cutting-edge technologies. This includes the widespread implementation of cloud computing, IoT (Internet of Things) devices, and artificial intelligence. While these technologies offer numerous benefits to businesses, they also introduce new security vulnerabilities that need to be constantly addressed. MSS providers must stay abreast of the latest technological trends and adapt their services to protect against emerging threats effectively.

Cyber Threat Landscape: Cybercriminals are becoming increasingly sophisticated and persistent in their attacks. They constantly develop new attack vectors, malware strains, and evasion techniques. This ever-evolving threat landscape requires MSS providers in

the UAE to continually update their security measures and stay one step ahead of cyber adversaries. Failure to do so can result in severe data breaches, financial losses, and damage to a company's reputation.

Regulatory Compliance and Data Privacy Concerns

The UAE Managed Security Services (MSS) market is confronted with another critical challenge that stems from the global shift towards stricter data privacy regulations and the need for regulatory compliance. Ensuring that security solutions and practices are aligned with these regulations is vital for businesses operating in the region. Two primary aspects of this challenge are:

Data Privacy Regulations: The UAE, like many other countries, has implemented stringent data privacy regulations such as the UAE Data Protection Law (DPL). These laws mandate that organizations handle personal data with care and transparency, and failure to comply can lead to substantial fines and legal repercussions. MSS providers must offer solutions that help businesses adhere to these regulations, which often require robust encryption, access controls, and data breach reporting mechanisms.

Cross-Border Data Flow: Many businesses in the UAE have a global presence, and data often flows across international borders. This presents a challenge because data privacy laws, like the European Union's GDPR, have extraterritorial reach. MSS providers must help clients navigate the complex landscape of cross-border data transfer, ensuring that data is adequately protected regardless of its location. This includes addressing issues related to data localization, international data transfer agreements, and compliance with diverse regulatory frameworks.

Meeting these challenges requires a multifaceted approach:

Legal and Compliance Expertise: MSS providers need to employ legal and compliance experts who can stay up-to-date with evolving regulations and help clients interpret and implement them correctly.

Data Protection Technologies: Investing in advanced data protection technologies, such as encryption, tokenization, and data loss prevention, is essential to ensure that data remains secure and compliant.

Audit and Reporting Capabilities: MSS providers must offer robust audit and reporting capabilities to help businesses demonstrate their compliance with data privacy

regulations. This includes providing evidence of security measures, incident response plans, and data handling practices.

Education and Training: Educating clients and their employees about the importance of data privacy and security is crucial. MSS providers can offer training programs to ensure that all stakeholders understand their role in maintaining compliance.

Key Market Trends

Rapid Digitization and Cloud Adoption

One of the prominent trends shaping the UAE Managed Security Services (MSS) market is the rapid digitization of various sectors, coupled with a surge in cloud adoption. As part of the Kingdom's Vision 2030 initiative, UAE is actively pursuing a comprehensive digital transformation agenda across industries, including government, finance, healthcare, and critical infrastructure. This drive towards digitization entails the migration of data, applications, and services to cloud platforms, which offers scalability, flexibility, and cost-efficiency. However, this trend also introduces new cybersecurity challenges, such as data security and cloud-specific threats. MSS providers are responding to this trend by expanding their offerings to include specialized cloud security solutions. These services encompass cloud-native threat detection, data encryption, identity and access management, and security posture assessments for cloud environments. Additionally, they are developing expertise in securing multi-cloud and hybrid cloud architectures, recognizing that organizations often use multiple cloud providers simultaneously. The ability to secure data and applications in the cloud is becoming a critical factor for businesses and government agencies alike, and MSS providers are well-positioned to address these evolving challenges.

Advanced Threat Landscape and AI-Powered Security

The second key trend in the UAE MSS market is the increasingly advanced and complex threat landscape. Cyberattacks are growing in sophistication, with threat actors employing techniques such as advanced persistent threats (APTs), zero-day exploits, and social engineering to breach organizations' defenses. As a result, there is a growing need for proactive and adaptive security measures that can identify and respond to emerging threats in real-time. MSS providers are leveraging artificial intelligence (AI) and machine learning (ML) to enhance threat detection and response capabilities. AI-powered security solutions can analyze vast amounts of data to identify unusual patterns and behaviors indicative of cyber threats. These technologies enable proactive

threat hunting and automated incident response, reducing the time to detect and mitigate attacks. Additionally, MSS providers are integrating threat intelligence feeds and sharing platforms to stay updated on the latest cyber threats and vulnerabilities. Another significant aspect of this trend is the focus on threat prevention rather than detection and response alone. MSS providers are increasingly adopting a holistic security approach that includes vulnerability assessments, penetration testing, and proactive security measures to minimize the attack surface. This trend aligns with the notion that preventing cyberattacks is more cost-effective and less disruptive than responding to them after a breach has occurred.

Compliance and Regulatory Mandates

The third pivotal trend in the UAE MSS market is the heightened emphasis on compliance and regulatory mandates. Regulatory authorities and industry-specific regulators in the Kingdom have introduced stringent cybersecurity regulations and frameworks to ensure the protection of sensitive data and critical infrastructure. These regulations cover a wide range of sectors, including financial services, healthcare, and critical infrastructure operators. MSS providers are playing a crucial role in helping organizations navigate these complex regulatory landscapes. They offer services and solutions that facilitate compliance with cybersecurity standards and regulations. This includes conducting regular security assessments, risk evaluations, and audits to ensure that organizations are adhering to the prescribed security measures. Additionally, MSS providers assist in the documentation and reporting required to demonstrate compliance to regulatory authorities. Moreover, the Kingdom's commitment to international cybersecurity standards and best practices is driving organizations to align with globally recognized frameworks such as ISO 27001 and NIST Cybersecurity Framework. MSS providers are actively supporting organizations in achieving and maintaining these certifications by providing tailored security services and expertise. advancement.

Segmental Insights

Deployment Type Insights

Based on the deployment type, the cloud segment for the managed security system is attributing the significant growth in the UAE market and is projected to collect considerable amount of revenue in the forecast period. This trend is poised to continue its ascendancy, projecting an impressive revenue collection in the forecast period. The rapid adoption of cloud-based MSS solutions by businesses across various industries in

the UAE can be attributed to several key factors. First and foremost is the unparalleled scalability and flexibility that cloud deployments offer, allowing organizations to tailor their security infrastructure to their specific needs. Additionally, the cloud's ability to provide real-time threat intelligence and automatic updates is proving invaluable in the face of constantly evolving cyber threats. Furthermore, the convenience and cost-efficiency of cloud-based MSS solutions have garnered favor among UAE enterprises, as they eliminate the need for extensive on-premises infrastructure and reduce operational overheads. As a result, the cloud segment in the UAE's MSS market is not only driving substantial growth but also positioning itself as a vital component in safeguarding businesses against the ever-present cybersecurity challenges of the digital age.

Organization Size Insights

Based on Organization Size, the managed security services in UAE market are divided into SME's, large enterprise. The large enterprises segment is expected to contribute the largest market share. Notably, the large enterprise segment is projected to play a paramount role by contributing the largest market share. Several factors underpin this dominance. Large enterprises typically possess extensive resources and budgets dedicated to cybersecurity, allowing them to invest in comprehensive MSS solutions. Their expansive operations, often spanning multiple sectors and geographies, require robust security infrastructures capable of handling complex threats. Moreover, large enterprises are frequently targets of sophisticated cyberattacks due to their high-profile nature, further driving the demand for advanced and scalable security services. Furthermore, compliance with stringent regulatory frameworks is crucial for many large corporations, and MSS providers catering to these entities must deliver tailored solutions that adhere to these requirements. Consequently, the large enterprise segment in the UAE's MSS market is poised not only to contribute the largest market share but also to set the tone for innovative and comprehensive security strategies in the region.

Regional Insights

Dubai, a thriving metropolis at the heart of the United Arab Emirates (UAE), has emerged as the fastest-growing region within the UAE's Managed Security Services (MSS) market. This remarkable growth can be attributed to several converging factors. Firstly, Dubai's bustling business landscape is characterized by enterprises spanning diverse industries, all keen on enhancing their competitive edge. To achieve this, they are rapidly integrating transformative technologies like cloud computing, the Internet of

Things (IoT), and digitalization into their operations. This strategic shift is driven by the desire to increase their presence, both domestically and globally, by leveraging the agility, scalability, and efficiency that these technologies offer. However, with this digital transformation comes an augmented need for robust cybersecurity measures, creating a soaring demand for MSS in Dubai. Enterprises in the region are recognizing the imperative of safeguarding their digital assets, sensitive data, and critical infrastructure, leading them to engage with MSS providers to fortify their cyber defenses. Consequently, Dubai stands as a beacon of growth in the UAE's MSS market, where the convergence of technological innovation and the imperative of cybersecurity is fostering a dynamic and rapidly expanding ecosystem.

Key Market Players

Injazat Data Systems LLC.

Help AG

DTS Solutions LLC.

BT Group Plc

Spire Solutions FZ LLC.

Fortinet, Inc.

Secureworks, Inc.

IBM Corporation (UAE)

Cisco Systems Middle East FZ-LLC.

Atos IT Solutions and Services Middle East FZ-LLC

Report Scope:

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

UAE Managed Security Services Market, By Service Type:

Managed Intrusion Detection System (IDS)/Managed Intrusion Prevention System (IPS)

Security Information & Event Management

Managed Firewall

Unified Threat Management

Others

UAE Managed Security Services Market, By Deployment Type:

On-Premises

Cloud

UAE Managed Security Services Market, By Organization Size:

Small & Medium-sized Enterprises (SMEs)

Large Enterprises

UAE Managed Security Services Market, By End User:

Government

BFSI

IT & Telecom

Manufacturing & Natural Resources

Others

UAE Managed Security Services Market, By Region:

Dubai

Sharjah

Abu Dhabi

Rest of UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the UAE Managed Security Services Market.

Available Customizations:

UAE Managed Security Services 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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