black hat
BRIEFINGS & TRAINING

**ABU DHABI**
TRAINING: NOVEMBER 8 & 9, 2010
BRIEFINGS: NOVEMBER 10 & 11, 2010
EMIRATES PALACE HOTEL ABU DHABI **I** UNITED ARAB EMIRATES

In partnership with:

TRA
TELECOMMUNICATIONS REGULATORY AUTHORITY

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MIDDLE EAST AND NORTH AFRICA (MENA) – THE FASTEST GROWING REGION IN THE WORLD.

IT spending in the MENA Region is forecast to grow 12% in 2010, faster than any other region. Only India, taken outside of its neighbours, is set to grow more rapidly.

Percentage Growth

Legend:
- Global
- Latin America
- Asia/ Pacific
- China
- MENA Region
- India
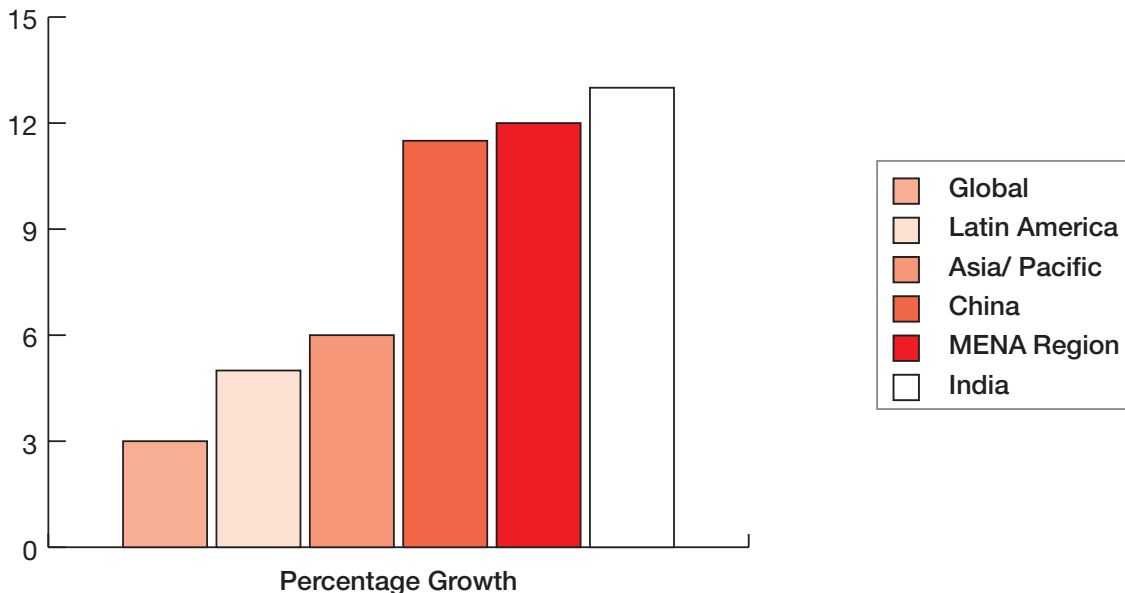
Figures taken from IDC Report, February 2010.

Total new spending on IT in 2010 is estimated at USD $63Billion. The Middle East will be responsible for more than a tenth of the world's new information technology spending this year, with a focus on software and services, and 17% of ICT spending over the next two years.

As a percentage of IT spending, Gartner estimated that security spending accounted for 4.3% of total spend, valuing new spend on IT security at USD $271M for the MENA region in 2010. A recent report in Gulf News stated a higher figure of $350 Million. Anecdotal evidence suggests that there will be an increased focus and percentage of spend on IT Security in future, as government and financial institutions in particular widen their mobile and online service offerings.

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A MAJOR OPPORTUNITY

A recent article "Online security spending up as cyber threat looms" (published Sunday, 17 January 2010; alrroya.com), outlined the needs and opportunities in the region:

"The credit crunch has pushed companies in the Middle East to spend more on protecting their data from spam, phishing and other forms of malicious software (malware) attacks, say industry sources."

The article also reported the opinion of a number of industry figures:

"[D]espite the prevailing economic condition, corporate board members are not hesitant to spend on security as they consider this to be their top priority" Johnny Karam, Symantec's regional director for Middle East and North Africa, whilst Hamed Diab, McAfee, Inc's regional director for the Middle East, was reported as saying *"companies in the region have actually been investing more to safeguard their data".*

Similarly, Tarek Kuzbari, managing director of Kaspersky Lab Middle East, *"said the crunch has definitely affected the market, but not in terms of spending."*

KEY DRIVERS OF GROWTH

Demographic and economic factors are driving these growth figures. The MENA population is young and growing rapidly. Diversification of oil wealth into other industries has ensured investment into connectivity has been a priority for governments.

POPULATION GROWTH IN THE MENA REGIONS:
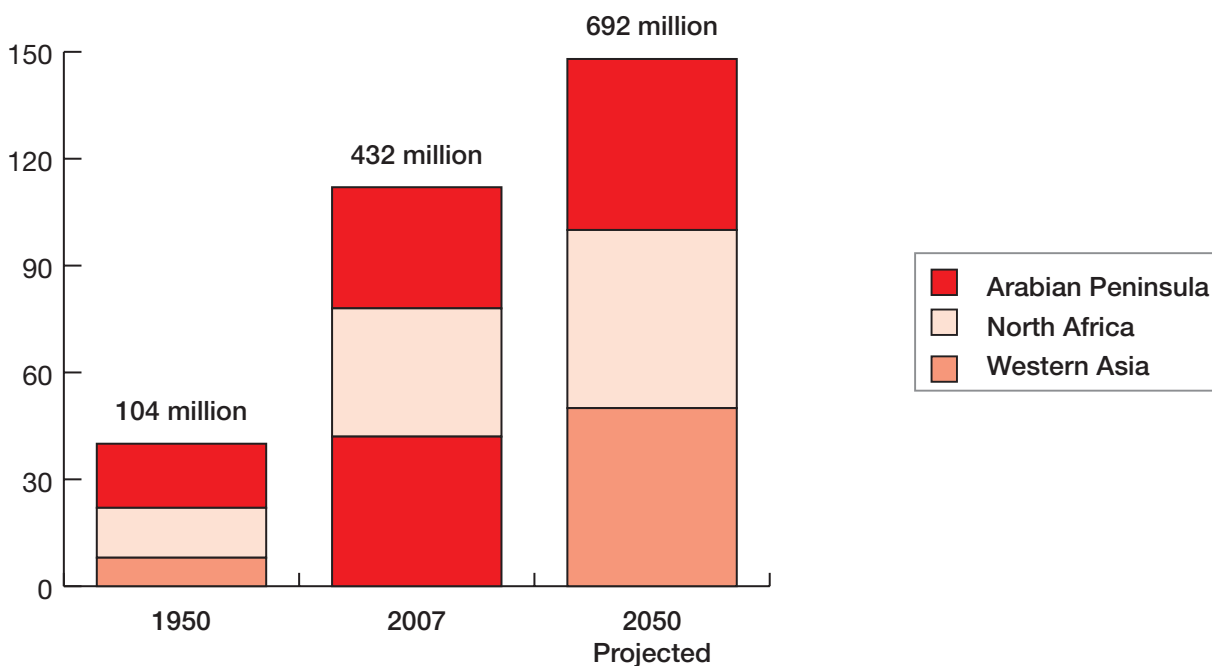
Source: UN, 2007.

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INTERNET PENETRATION

The Middle East has a penetration rate of 28.3%, against a global average of 25.5%. There were an estimated 57 million internet users in the region in 2009. The value for Security providers lies in the hyper growth rates in connectivity, with a 1,648% increase over the previous decade (against 368% for the Rest of the World). As accessing the internet becomes increasingly a part of daily life, governments and service providers are investing to deliver their products and communications through these channels.

However, security practices have not kept pace with these developments. In the UAE researchers from the American University of Sharjah found only 49% of wireless networks were WEP enabled. ("UAE lacks in wireless security awareness ", ArabianBusiness.com, 01 July 2007

MOBILE PENETRATION

The UAE's Telecommunication Regulatory Authority (TRA) reported mobile subscribers in the country passed 10 million subscribers this year. The number, which doubled in the last four years, represents an unprecedented mobile penetration rate of over 200%. As a result, UAE is now one of the highest penetration markets in the world.

GOVERNMENT FOCUS

The UAE Government is committed to offering services through online solutions, including processing of confidential and critical information. Financial institutions are also focused on delivery of online and mobile services, taking advantage of one of the world's highest penetration rates for mobile devices.

The TRA's strategic support of Black Hat Abu Dhabi is testament to the focus of the UAE government in this area. aeCERT, the TRA initiative charged with managing threats in this area, has as it's mission an aim to

"sustain a resilient and vigilant ICT infrastructure against a broader set of cyber security threats [and to] build a secure and safe cyber culture in the United Arab Emirates."

KEY FIGURES (MENA REGION)

IT Spending 2010: $63 Billion
IT Spending Growth 2010: 12%
Regional Spend as Percentage of Total ICT Spend: 17%
IT Security Spending 2010: $271 Million
Population 2007: 432 Million
Population Projection 2050: 692 Million
Population Growth Projection: 160%
Internet Penetration: 28.3%
Internet Penetration Growth Last Decade: 1,648%

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MIDDLE EAST INTERNET USAGE & POPULATION STATISTICS						
MIDDLE EAST	Population (2009 Est.)	Usage, in Dec/ 2000	Internet Usage, Latest Data	% Population (Penetration)	User Growth (2000 - 2009)	(%) of Table
BAHRAIN	728,709	40,000	402,900	55.3%	907.3%	0.7%
IRAN	66,429,284	250,000	32,200,000	48.5%	12,780%	56.1%
IRAQ	28,945,569	12,500	300,000	1%	2,300%	0.5%
ISRAEL	7,233,701	1,270,000	5,263,146	72.8%	314.4%	9.2%
JORDAN	6,269,285	127,300	1,500,500	23.9%	1,078.7%	2.6%
KUWAIT	2,692,526	150,000	1,000,000	37.1%	566.7%	1.7%
LEBANON	4,017,095	300,000	945,000	23.5%	215%	1.6%
OMAN	3,418,085	90,000	465,000	13.6%	416.7%	0.8%
PALESTINE (WEST BK.)	2,461,267	35,000	355,500	14.4%	915.7%	0.6%
QATAR	833,265	30,000	436,000	52.3%	1,353.3%	0.8%
SAUDI ARABIA	28,686,633	200,000	7,700,000	26.8%	3,750%	13.4%
SYRIA	21,762,978	30,000	3,565,000	16.4%	11,783.3%	6.2%
UNITED ARAB EMIRATES	4,798,491	735,000	2,922,000	60.9%	297.6%	5.1%
YEMEN	22,858,238	15,000	370,000	1.6%	2,366.7%	0.6%
GAZA STRIP	1,551,859	n/a	n/a	n/a	n/a	n/a
TOTAL MIDDLE EAST	202,687,005	3,284,800	57,425,046	28.3%	1648.2%	100%

INTERNET USERS IN THE MIDDLE EAST & IN THE WORLD						
MIDDLE EAST REGION	Population (2009 Est.)	Population % of World	Internet Usage, Latest Data	% Population (Penetration)	User Growth (2000 - 2009)	Users % of World
TOTAL IN MIDDLE EAST	202,687,005	3%	57,425,046	28.3%	1,648.2%	3.3%
REST OF THE WORLD	6,565,118,203	97%	1,676,568,695	25.5%	368.7%	96.7%
WORLD TOTAL	6,767,805,208	100%	1,733,993,741	25.6%	380.3%	100%

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IT SECURITY SOLUTIONS LIKELY TO ATTRACT MORE INVESTMENT

By Naushad K. Cherrayil, Staff Reporter. Published July 10, 2010, gulfnews.com

AROUND 70 PER CENT OF THE OVERALL IT SECURITY SPENDING WILL BE DRIVEN BY THE TELECOMMUNICATION, GOVERNMENT AND FINANCE SECTORS AND THIS HAS BEEN THE CASE OVER THE LAST TWO YEARS AS SECURITY REMAINS AMONG THE TOP SPENDING PRIORITIES FOR IT MANAGERS, SAYS RANJIT RAJAN, SENIOR RESEARCH ANALYST, IDC MEA

Dubai: Investment in IT security solutions in the Gulf states is expected to continue to increase over the next couple of years as the quality of IT infrastructure continues to improve in the region.

Increased internet penetration necessitates securing more access points, thereby requiring more spending on IT security solutions. In addition, with the increased usage of converged mobile devices or smartphones, a substantial portion of internet access happens on mobile devices, and this, in turn, requires further investment in security, Ranjit Rajan, Senior research analysts, IDC MEA, told Gulf News.

Spending on IT security software and appliances (excluding services) in the Gulf states is forecast to reach $350 million in 2010, an increase of around 13 per cent compared to $310 million in 2009.

Around two per cent of IT spending, which is expected to touch $15 billion this year, is expected to be spent on security software and appliances (excluding services). Saudi Arabia remains the largest market in the region, followed by the UAE. Saudi Arabia and the UAE are estimated to contribute about 75 per cent of IT security while other Gulf states will contribute the remainder.

Rajan said about 70 per cent of IT security spending will be driven by the telecommunications, government and finance sectors and this has been the case over the last two years as security remains among the top spending priorities for IT managers.

IT security is expected to remain a concern for business in the region for many years. The ever-increasing volume of malware coupled with the necessity of modern enterprises to maintain round-the-clock business availability will drive spending. As regional companies make strides in the global marketplace, they often see that a robust IT security system is a must-have for them to be able to compete globally.

Controlling cybercrime is a challenging task, Rajan said, and requires constant monitoring of networks by authorities and stringent implementation of legislation. Companies, on the other hand, must have the robust security policies in place that are easily understood and adhered to by employees, risk assessment tools that allow them to be more proactive, and above all, processes that ensure all security systems are up to date with the latest signatures.

As internet penetration continues to rise and mobile technologies continue to spread, exposure to data and identity theft will remain a main concern.

Companies are going to have to focus on mobile security solutions and work on having properly defined mobile security policies. An increased mobile workforce produces a large volume of data on the move, IT departments need to secure laptops and smart phones to prevent the loss of this data through theft or accidents, he said.

Countries such as Saudi Arabia and the UAE are implementing national identity initiatives, through which they will issue smart cards carrying citizens' biometric data and other crucial information.

He said ID cards maybe helpful in identifying people engaging in cybercriminal activities as most of the information can be tracked centrally. However, the chances of identity theft can increase if proper steps are not taken to secure the card's information.