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وزارة النقل والاتصالات وتقنية المعلومات
Ministry of Transport, Communications and Information Technology

Cybersecurity Market and investment

Report

2026

Sultanate of Oman

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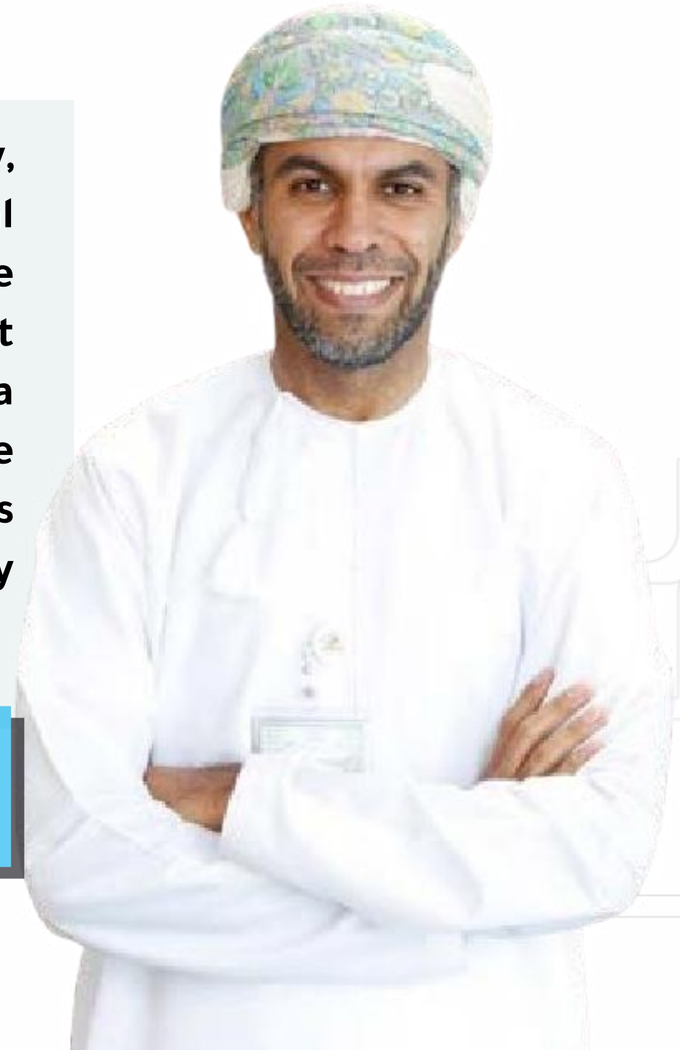
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Executive Summary

The Sultanate of Oman is rapidly emerging as a regional leader in cybersecurity, driven by the strategic mandates of Oman Vision 2040 and the National Digital Economy Program. This report analyzes the current market dynamics, the transformative impact of the Hadatha Program, and the burgeoning investment landscape. With a "Tier 1" global ranking in cybersecurity readiness, Oman offers a stable and high-growth environment for government stakeholders, private enterprises, international investors, and the academic community. The sector is currently transitioning from a service-centric model to a robust national industry characterized by local innovation and expert service exports.



HE Dr. Ali Al Shidhani

Undersecretary of MTCIT for ICT

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Overview

Oman has pioneered the region's first national program dedicated to cybersecurity industry development, strategically shifting the paradigm from purely defensive measures to cybersecurity as a core economic enabler. With a vision of a 'Specialized Cybersecurity Industry Promoting Economic Growth and Diversification,' The Hadatha Cybersecurity Industry Program initiatives are driven by six key strategic pillars: Enhancing skills, Fostering innovation, Empowering startups and SMEs, Providing market incentives, Supporting service exports, and Strengthening collaboration. This report highlights the national progress and demonstrates the program's role in accelerating growth for investors, academia, startups, and SMEs.

Furthermore, it outlines key opportunities for stakeholders and the strategic roadmap for the Hadatha program 2026-2030..



Eng. Badar Al-Salehi
Director General - Oman National CERT

Global Cybersecurity Market

The global cyber security market size was valued at USD 301.91 billion in 2025,

calculated at USD 339.96 billion in 2026, and is expected to reach around USD 878.48 billion by 2034. The market is expanding at a solid CAGR of 12.6% over the forecast period 2025 to 2034.



Source : www.precedenceresearch.com

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Oman Cybersecurity Market Size and Growth Projections

The Oman cybersecurity market is expected to grow from USD 135.33 million in 2025 to USD 146.12 million in 2026 and is forecast to reach USD 214.27 million by 2031 at 7.97% CAGR over 2026-2031. Adoption is accelerating as Vision 2040 programs mandate “security by design” for every new public-sector workload, while enterprises digitize supply chains and customer channels. Mandatory data-residency rules channel fresh capital toward domestic data centers and sovereign cloud zones, stimulating vendor partnerships and managed security uptake.

Source : Mordor intelligence

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Local Cybersecurity Industry

The number of local cybersecurity companies increased from 16 in 2020 to 48 following the Hadatha Program (2021-2025).

The accredited cybersecurity service providers grew from 4 companies (local and international) in 2021 to 11 by the end of 2025.

The total number of local developed cyber security products is 17.

56
Total Companies Providing Cybersecurity Services in Oman

34
Local

22
Global

11
Accredited Companies in providing Cybersecurity Services

3
Local companies obtained international accreditation

17
Local Cybersecurity Products

List of Local Cybersecurity Companies

Human Capital

18

Academic institutions that offer a cybersecurity major



Source : [Study in Oman]

445

Number of Cybersecurity Students in Academic Institutions



13,000

Beneficiaries of Hadatha cybersecurity program over 5 years



1,870

Job Seekers in the Field of cybersecurity



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Stakeholder-Specific Insights

For Government and Public Sector

Government entities are encouraged to align with the National Cybersecurity Index, with a strong emphasis on enhancing institutional readiness and resilience. This supports the objectives of Oman Vision 2040 and the national digital economy agenda, while fostering the adoption of trusted national cybersecurity solutions to strengthen digital sovereignty and sustainable economic growth.

For the Private Sector and Corporates

The demand for Managed Detection and Response (MDR) and Vulnerability Assessment and Penetration Testing (VAPT) services is steadily increasing across the ICT sector. Large enterprises are encouraged to establish partnerships with locally accredited cybersecurity firms to align with national security standards, enhance digital sovereignty, and optimize operational costs.

For Academic Institutions and Researchers

Academic stakeholders should leverage the Hadatha Cybersecurity Centers for hands-on experience and innovation. Hadatha Cybersecurity Centre of Excellence at the Sultan Qaboos University), Middle East College, and University of Technology & applied science - Muscat provides a platform for bridging the gap between academic theory and industrial application .

For Entrepreneurs and Startups

The Cybersecurity Pre-Incubation Programme at the Hadatha Center for Cybersecurity Industry, along with Oman Startup Hub (OSH), supports early-stage ventures by turning ideas into market-ready solutions. Entrepreneurs are encouraged to develop local cybersecurity products aligned with national innovation and economic goals.



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Hadatha Program: Strategic Pillars and Achievements

The Cybersecurity Industry Program (Hadatha), overseen by the Oman National CERT under the Ministry of Transport, Communications and Information Technology (MTCIT), is the primary vehicle for industrializing the sector. The program's 2021-2025 report highlights significant milestones across six strategic pillars

"The vision of the Hadatha program is to establish a specialized cybersecurity industry that enhances and diversifies economic growth, grounded in innovation, creativity, and excellence."

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Summary : Key Hadatha Program Outputs (2021 - 2025)

96 Point 2020 → 2024 97.02 Point

Sultanate of Oman Ranked globally in the First most cybersecurity-readiness countries

17

No. of local products

Launching Cyber-security Industry Development Watch Center

No.of approved initiatives in Hadatha Program **36**

120

No. of events, workshops and competitions locally and internationally

6

No. of new startups

36

No. of frameworks and studies

2

No. of international awards

Beneficiaries served from Hadatha Program

13,000

3 Local companies

obtained international accreditation

32

No. of Memorandums of Cooperation

Framing 6 Investment Opportunities

Launching 3 Hadatha cyber-security industry centers

Future Outlook: Hadatha (2026 - 2030)

KEY HADATHA PROGRAM RESULT

(2026 - 2030)

01 Support the development of **15** Local Cybersecurity Products

02 Establishing **8** local cybersecurity companies

03 Creating (28%) cybersecurity job/income opportunities

04 Tier 1 I Ranking in global rankings in cybersecurity

The next phase of the Hadatha Cybersecurity Industry Program focuses on moving from foundational development to delivering tangible economic and industrial impact by building a comprehensive national ecosystem driven by innovation, company growth, and investment attraction. It aims to turn initiatives into sustainable outcomes by supporting scalable cybersecurity products and services and enabling national companies to compete regionally and globally.

Future Outlook: Hadatha (2026 - 2030)

This will be implemented through eight integrated tracks comprising 22 initiatives, designed to strengthen the cybersecurity industry, foster innovation, support company growth, attract investment, and enhance regional and international presence.

KAFA'A (CAPABILITY)	INTILĀQA (LAUNCH)	TANMIYA (DEVELOPMENT)	TAHFEEZ (STIMULATION)	TAMAYUZ (EXCELLENCE)	SHARAKA (PARTNERSHIP)	THEQA (DIGITAL TRUST)	TAKĀMUL (INTEGRATION)
Build national capabilities across various cybersecurity specializations in alignment with labor market needs and ensure graduates and workforce readiness for cybersecurity careers	Enable the growth and expansion of national cybersecurity companies locally and support their entry into regional and international markets.	Support the cybersecurity innovation and entrepreneurship ecosystem and foster the development of national cybersecurity products and solutions.	Promote the cybersecurity industry nationally and regionally while encouraging investment and freelancing opportunities in the sector.	Develop an integrated framework for measuring and analyzing the performance and competitiveness of the cybersecurity industry	Enhances Oman's cybersecurity through global partnerships, strategic initiatives, diplomacy, and knowledge exchange across sectors.	Build a trusted digital ecosystem that supports Oman's digital transformation and ensures safe, legal, and reliable online services in line with national regulations	Supporting the development of the cybersecurity industry and strengthening Oman's digital economy.



International Recognitions and Global Standing

Category One

Sultanate of Oman Ranked globally in the First most cybersecurity-readiness countries

2020 — 96 نقطة

97.02 نقطة — 2024

Five World Guinness Record

Oman achieved five Guinness World Records during the 11th Regional Cybersecurity Week,

First

Regional Cybersecurity Center (RCC)established in accordance with the agreement signed between the Sultanate of Oman, represented by MTCIT and ITU

المركز الاقليمي للأمن السيبراني
REGIONAL CYBERSECURITY CENTER

Chair

Of the Board of Directors of the Organization of Islamic Cooperation for the National Cybersecurity Centers / CERTs (OIC-CERT)

OIC-CERT
Computer Emergency Response Team



Investment Environment in Oman

Oman offers favorable long-term conditions for investment. Real GDP grew on average 4.7%, supported by high investment rates, modern logistics, and open markets. Oman's ports (Salalah, Duqm, Muscat, Sohar) provide access to Asia, Africa, and Europe.

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Why Oman ?

The following provides a summary of Oman's main competitive advantages:

Strategic location

The Sultanate of Oman is the third largest country on the Arabian Peninsula, with a total area of 309,500-sqm km and a coastline stretching for over 3,000 km overlooking the Arabian Gulf, the Sea of Oman and the Arabian Sea. Oman is strategically located at the entrance to the Arabian Gulf, the source of two-thirds of the world's oil exports, ensuring easy access to the world's prime markets (including the ability to bypass the Strait of Hormuz) - India, China, Africa, the European Union and the Americas. With high quality seaports at Salalah, Duqm, Muscat and Sohar, Oman offers access to three continents and more than 2.0 billion consumers.

Different Environments

Oman is home to array of different environments and terrains. Meaning that it is an ideal location to do testing and experimenting in different environmental conditions.

Strong agreements between USA-Oman

The United States and Oman have signed a number of agreements to strengthen the ties between both countries including the Free Trade Agreement and the Science and Technology Cooperation.

Zones Options

Artificial Intelligence ZONE







Zones Options

Innovation Park Muscat

- It is an initiative under the Ministry of Higher Education, Research and Innovation (MoHERI).
- IPM is the first multi-sectoral Science and Technology Park in Oman.
- IPM will be the platform that will bring the government, private, and academic sectors together.
- IPM has three buildings in phase one:
  - **The Innovation Center (including incubators for start-ups & SMEs)**
  - **Social Center and Prototyping Center.**
  - **Leasable Land Lots allocated for R&D arms of the international companies.**

Madayn

- The Public Establishment for Industrial Estates.
- Established in 1993 in continuity of the industrial march that began in the Sultanate with the establishment of Rusayl Industrial City in 1983.
- It manages and operates (10) industrial cities in Sur, Sohar, Raysut, Nizwa, Buraimi, Rusayl, Samail, Ibri, Al Mudhaibi, and Mahas, in addition to Knowledge Oasis Muscat (KOM) and Al Mazunah Free Zone.

Sohar Free Zone

- It is one of the regional-industrial-areas that is growing rapidly and one of the regional-logistics-hubs.
- It enjoys a strategic location outside the Straits of Hormuz, linking regional and international markets together, and major regional and global shipping routes are accessed via Sohar Port.
- It has excellent road connectivity to the UAE, Saudi Arabia, and Yemen
- Sohar port is calling (linked) with most of the regional ports in GCC, Iran, Africa, Fareast and others
- Sohar is having International Airport that recently started full operations

Khazaen Economic City

- It is a world-class integrated economic city bringing together a broad range of logistics, light industrial, and commercial businesses at one location.
- Growth and economic value creation
- Covering 51 million sqm of land in Barka, the new economic city is the largest public and private partnership (PPP) land development project in the Sultanate of Oman Set to attract a broad range of business sectors and construction
- Key offerings will include packaging, assembly, distribution, and manufacturing businesses in tandem with secondary industries such as legal and financial services.

The Special Economic Zone at Duqm

- It is the largest special economic zone in the Middle East and North Africa
- It is located in Al WustaGovernorate in the center of the Sultanate of Oman, at a distance of 550 square kilometers from the capital Muscat.
- It is the largest in the Middle East and North Africa, with an area of 2,000 square kilometers. The Special Economic Zone at Duqm contains several economic, tourism and service development zones, the most prominent are a multi-purpose port, a dry dock for repairing ships, a fishing port, a regional airport, and tourist, industrial and logistical areas.
- It enjoys many advantages, making it among the most prominent investment destinations at regional and international levels. Given its prime geographical location overlooking the Arabian Sea and the Indian Ocean beyond, coupled with its proximity to global shipping lanes, Duqm has attracted the attention of many companies worldwide as the perfect destination for their investment.
- The Special Economic Zone at Duqm (SEZD) is also characterized by its ability to embrace projects, in not only the industrial sector, but in tourism, trade, logistics and real estate development too. In addition, SEZAD is capable of providing areas needed by investors to build their projects.

Salalah Free Zone

- It is the global leading Hub for quality industrial and logistical activities
- It is offering the required services to get tenant started with their operations as well as meeting needs that may arise thereafter
- Salalah Free Zone Company SAOC is the operating party for the Free Zone in Salalah
- The operating party and the working company is given the incentives, privileges and facilities stated in the Free Zones Law
- It is a location with cost competitive market reach and access in a country that has a business-oriented environment
- The Salalah Free Zone offers solutions to business owners and multinationals looking to expand their operations into Middle East, Africa, Southern Europe and South Asia.
- It assist the investor with any needs and requirements for the establishment of the organization's presence and operations inthe free zone

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Access to venture and private equity capital

There are opportunities through a number of venture capital originations such as

- Government entities:
  - Oman Investment Authority
  - Oman Future Fund
  - Oman Investment Bank
  - Phaze Ventures
- Civil pension funds
- Loans through local banks (supported by government entities)
- Local investors (Angel Investors)



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Oman Key Incentives

The Omani government, through the Ministry of Transport, Communications and Information Technology (MTCIT) and Invest Oman, offers a comprehensive suite of incentives designed to attract and retain cybersecurity firms:

Financial and Tax Incentives:

%100
ownership permitted for specific projects and specific economic zones

No restrictions
oncurrenciesorrepatriation of capital/profits

Corporate tax exemptions for up to
25 years
at free and industrial zones

0%
Personal Income Tax

Free Trade Agreements
between Oman and the USA and the same with Oman and Singapore.

Can apply for
an investor visa
and obtain a resident permit (as per Sultanate of Oman laws and regulations)

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Oman Key Incentives

Operational and Strategic Support:

MTCIT Accreditation Program

A structured pathway for cybersecurity service providers to gain official recognition, facilitating access to government tenders

Fast-Track Licensing

Streamlined procedures through the "Invest Oman" portal to reduce administrative hurdles for new market entrants

Subsidized Utilities and Land

Available in various industrial and technology zones, such as the upcoming Artificial Intelligence Zone

Incentives for SMEs

Specific grants and support for startups under the Hadatha Program to foster local innovation



Cybersecurity Investment Opportunities

Oman Cybersecurity Investment Landscape

2021 - 2025

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96 Point 2020 → 2024 97.02 Point

Sultanate of Oman Ranked globally in the First most cybersecurity-readiness countries

Hadatha Initiatives: 36

13,000 Hadatha Program Beneficiaries

Cybersecurity Market

Global Cybersecurity Market:

USD 218.98B → USD 689.39B
Annual growth rate (CAGR) 2025-2034 : 13.9%

Oman Cybersecurity Market:

USD 135.33M → USD 199.31M
Annual growth rate (CAGR) 2025-2030 : 8.05%



120 Events, workshops and competitions locally and internationally

Hadatha Centers: 3 Hadatha cyber-security centers

32 Memorandums of Cooperation

Cybersecurity Ecosystem

56 Cybersecurity Companies

11 Accredited

Local : 34
Global : 22

17 local products

3 Local companies obtained international accreditation

Competitive advantages

- Strategic location connecting Asia, Africa & the Middle East
- Hosting the Regional Cybersecurity Center (RCC)
- Strong government and regulatory support
- Skilled local talents
- High potential for regional and global partnerships

High-Potential Investment Opportunities

6

- Cybersecurity Insurance (Established 5 companies)
- Cybersecurity Firewall Lab
- Quantum Cybersecurity Center
- Data Recovery Center
- AI-Powered Security Operations Center (AI SOC)
- Cybersecurity-as-a-Service (CaaS) for Small and Medium Enterprises (SMEs)

Interested in investing /partnering

Contact : CCA@mtcit.gov.om

Investment Opportunities in **ICT Sector**

Cybersecurity Firewall Lab

Opportunity Name

Cybersecurity Firewall Lab

Location

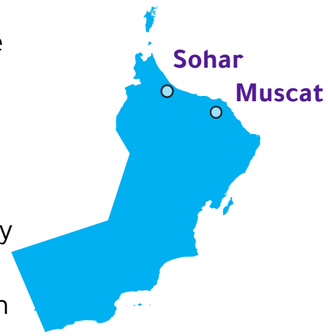
- Muscat
- Sohar

Sector

Cybersecurity

Investment Offer

The Sultanate of Oman is emerging as a hub for technological advancements and cybersecurity initiatives. Establishing a Firewall Cybersecurity Lab in Oman presents a strategic investment opportunity to capitalize on the growing demand for robust cybersecurity measures in the region. With the increasing in the digital transformation, Oman is witnessing a surge in cyber threats, necessitating advanced cybersecurity solutions. The opportunity includes services such as protecting critical infrastructure, data and cloud services including Government, Finance, Energy, and Oil & Gas sectors from cyber threats. The Firewall Cybersecurity lab will act as an Innovation Hub that developing cutting-edge firewall technologies and cybersecurity solutions tailored to the needs of the region and plays a role in the Research and Development (R&D) which will ensure the lab stays ahead of emerging threats and provides state-ofthe-art solutions. This will be the first project in the Middle East and East Africa.



Investment highlight

Global Firewall as a Service Market size:

USD 3.15 Billion in 2023 ▶ USD 12.26 Billion by 2030

Annual growth rate (CAGR) 2024-2030

16.46%

- Fast digital transformation
- 9 local data centers
- 21 submarine telecom cables
- 66 government-owned companies

Competitive advantage

- Strategic location
- Oman hosting the Regional Cybersecurity Center
- Potential partners
- Government supports
- Local Talents
- Category One Oman's Ranking in the ITU Global Cybersecurity Index

Stakeholders

- Government Entities and Private Sector
- Technology Providers and Partners
- Investment and Financial Institutions
- Academic and Research Institutions

Requirements

- Commercial registration
- Business proposal
- Sector License

Executive position

Preliminary Feasibility Study

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Investment Opportunities in **ICT Sector**

Data Recovery Center

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Opportunity Name

Data Recovery Center

Location

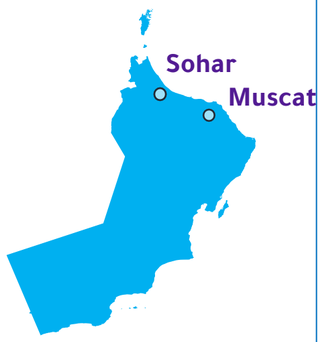
- **Muscat**
- **Sohar**

Sector

Cybersecurity

Investment Offer

Establishing a specialized center in Oman providing secure and reliable data recovery services, ensuring the retrieval and protection of sensitive and lost data for government entities, businesses, and individuals, in compliance with international security and data protection standards.



Investment highlight

Data Recovery Market

Annual growth rate (CAGR) 2024-2032:
13.40%

Data recovery market (CAGR) 2022-2030:
10.56%

Competitive advantage

- **Strategic location**
- **Muscat and Sohar have major ports and nearest by E-Waste landfill**
- **An attractive destination for establishing a specialized Secure Data Recovery Center, offering opportunities to address growing regional demand for secure and reliable data recovery services.**

Stakeholders

- **Be'ah Company**
- **Government Entities and Private Sector**
- **Oman Free and Economic Zones**
- **Technology Partners and Providers**
- **Local and International Venture Capital Funds and Institutions**

Requirements

- **Commercial registration**
- **Business proposal**
- **Sector License**

Executive position

Preliminary Feasibility Study

Investment Opportunities in **ICT Sector**

AI-Security Operations Center (AI SOC)

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Opportunity Name

AI- Security Operation Center (AI SOC)

Location

Muscat

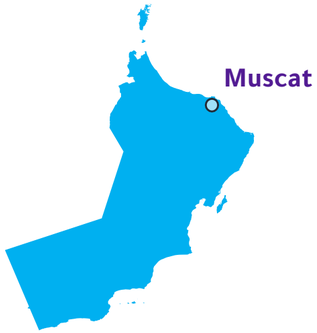
Sector

Cybersecurity

Investment Offer

The global Artificial Intelligence in Cybersecurity (AI SOC) market was valued at **USD 25.35** billion in 2024 and is projected to reach **USD 93.75** billion by 2030, growing at a compound annual growth rate **(CAGR) of 24.4%**.

Muscat offers an ideal location for AI SOC investment, with strong digital infrastructure, proximity to submarine cable stations, and access to 20+ international cables—including a new link to Australia. Its coastal advantage ensures low-latency connectivity, while its stable, secure environment supports regional and global cybersecurity operations



Investment highlight

- Total estimated investment USD 10M
- The offered opportunity is targeting tier around 200-400 organizations and entities
- Implementation duration period Around 12 Months
- AI SOC area : 1,395 - 4,645 Sqm

Competitive advantage

- Oman's strategic location at the intersection of Asia, Africa, and Europe positions it as a prime gateway for cross-border cybersecurity services, particularly bridging the MENA and APAC regions with seamless connectivity and regional access
- Oman offers a politically stable and secure environment with clear regulatory frameworks. National initiatives like the Cybersecurity Strategy and incentives in economic zones reflect strong government backing for digital infrastructure investments.
- Oman's cybersecurity market is still developing, offering first-mover advantages for AI-driven solutions. The limited number of advanced SOC providers creates a unique opportunity to lead in shaping the nation's cyber defense landscape.

Stakeholders

- Government Entities and Private Sector
- Technology Partners and Providers
- Investors and Financial Institutions
- Academic and Research Institutions
- International Organizations

Requirements

- Commercial registration
- Business proposal
- Sector License

Executive position

Preliminary Feasibility Study

Investment Opportunities in **ICT Sector**

Cybersecurity-as-a-Service (CaaS) for Small and Medium Enterprises (SMEs)

Opportunity Name

Cybersecurity-as-a-Service (CaaS) for Small and Medium Enterprises (SMEs)

Location

Muscat

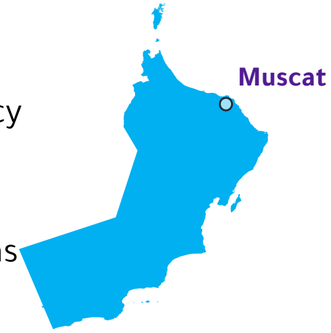
Sector

Cybersecurity

Investment Offer

The cybersecurity-as-a-service market is rapidly growing, from $161.15 billion in 2024 to $179.47 billion in 2025, at a CAGR of 11.4%. This growth is driven by the rising number of data breaches, high costs of on-premise solutions, increased SME adoption, more connected devices, and the growing frequency of cyber-attacks.

Muscat, Oman's economic hub, is home to many SMEs and has a strong technological infrastructure. The growing digital transformation in both government and private sectors drives demand for digital services and cybersecurity solutions, with financial and telecom institutions further emphasizing the need for robust security.



Investment highlight

Total estimated investment
USD 19.5M

The offered opportunity is targeting tier
141,126 SMEs

Implementation duration period
Around 12 Months

AI SOC area :
465 - 9,290 Sqm

Competitive advantage

- CaaS offers affordable cybersecurity services tailored for SMEs, providing cloud-based, scalable pricing models. SMEs only pay for what they need, making it a budget-friendly alternative to expensive, on-premise solutions.
- CaaS allows SMEs to scale cybersecurity services based on their needs, adapting as their business grows. It offers flexible, customizable plans, ensuring businesses pay only for the services that are relevant to them.
- CaaS ensures continuous protection through realtime monitoring, threat detection, and automatic updates. SMEs receive enterprise-level security without the need for inhouse teams, protecting them from evolving cyber threats

Stakeholders

- Government Entities and Private Sector
- SMEs Development Authority
- Local and International Venture Capital Funds and Institutions
- Telecom and IT Companies
- Technology Partners and Providers
- Cybersecurity Vendors and Solution Providers

Requirements

- Commercial registration
- Business proposal
- Sector License

Executive position

Preliminary Feasibility Study

استثمر في عُمان
Invest OMAN

Investment Opportunities in **ICT Sector**

Quantum Cybersecurity

وزارة النقل والاتصالات وتقنية المعلومات
Ministry of Transport, Communications and Information Technology

Opportunity Name

Quantum Cybersecurity

Location

Muscat

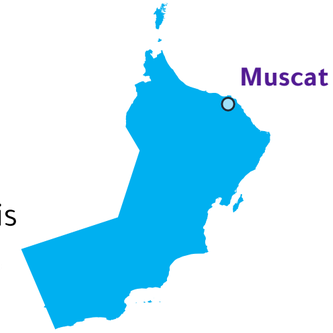
Sector

Cybersecurity

Investment Offer

The global quantum cybersecurity market is expected to grow from $1.5 billion in 2023 to $8.8 billion by 2030, with a CAGR (Compound Annual Growth Rate) of 28.4%.This growth is driven by the increasing threat of quantum computing to traditional encryption methods and the rising need for postquantum cryptography solutions.

The best location for investing in quantum cybersecurity in Oman is Muscat, due to its advanced infrastructure, government initiatives, and focus on critical sectors. Duqm and Sohar are also promising with industrial growth and port security, while Salalah and Al Batinah offer future potential in trade and energy. Overall, Muscat provides immediate opportunities, while Duqm and Sohar represent long-term growth areas.



Investment highlight

Total estimated investment
USD 5M - 15M

The offered opportunity is targeting tier
Local / Regional/ International

Implementation duration period
12 - 18 months

AI SOC area :
500 to 1,000 Sqm

Competitive advantage

- Strategic Location & Digital Growth
- Government Support for Innovation and Investment in Advanced Technologies
- Ecosystem & Collaboration: The Oman Technology Fund (OTF) and Sultan Qaboos University support quantum technology development and industry-academic collaboration.
- Quantum Computing Guidelines

Stakeholders

- Government Entities and Private Sector
- Telecom and IT Companies
- Local and International Venture Capital Funds and Institutions
- Academic and Research Institutions
- International Partners and Providers
- Cybersecurity Vendors and Solution Providers

Requirements

- Commercial registration
- Business proposal
- Sector License

Executive position

Preliminary Feasibility Study



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