2010-2018

Saudi Arabia Homeland Security Market Outlook – 2010-2018



Homeland Security Research Corp.

Saudi Arabia Homeland Security Market Outlook 2010-2018

Revised Edition February, 2009

Quoting Homeland Security Research Corporation ("HSRC") Information and Data

Internal Documents and Presentations – Quoting individual sentences and paragraphs for use in your company's internal communications does not require permission from HSRC. The use of large portions or the reproduction of any HSRC document in entirety does require prior written approval and may involve some financial consideration.

External Publication – Any HSRC information that is to be used in advertising, press releases, or promotional materials requires prior written approval from the appropriate HSRC President or Country Manager. A Draft of the proposed document should accompany any such request. HSRC reserves the rights to deny approval of external usage for any reason.

Note: This is a Single User License Copy (unless otherwise stipulated in purchase agreement).

Exclusion of Warranties and Liabilities

Homeland Security Research Corporation ("HSRC") shall use its reasonable endeavor to provide information that is accurate. However, HSRC makes no representation or warranty as to the accuracy or completeness of any information provided. HSRC also expressly disclaims any representation or warranties that may be implied under applicable law, including, without limitation, any warranty of merchantability or fitness for a particular use.

HSRC is not liable for any loss or damage claimed to have resulted from the use by, or on behalf of, the client of any information or material furnished by HSRC, regardless of the circumstances or cause of action (including negligence), and the client shall hold HSRC harmless from, and indemnify it for, any loss, cost, or expense including reasonable attorneys' fees, suffered or incurred as a result of, or in connection with, any claim, suit, or action by the client or any third party relating to that use. In no event (including negligence) will HSRC be liable for any indirect, special, consequential, or exemplary damages, even if HSRC was advised of the possibility of such damages, or for any damages in excess of the amount actually received by HSRC under this Agreement as of the date when the cause of action occurred.

Copyrighted © 2009, HSRC. All Rights Reserved.

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical or by photocopying, recording, or otherwise, without prior written permission of Homeland Security Research Corporation.

Table of Contents

1. Scope, Methodology and Assumptions

- 1.1. Scope
- 1.2. Saudi Terror Scenario Assumptions 2009-2018
- 1.3. Methodology
- 1.4. Important Notes
- 1.5. Terror Threats to the Saudi Kingdom
 - 1.5.1. Terms of Reference
 - 1.5.2. Reconciling Saudi Homeland Security (HLS) and Saudi Homeland Defense (HLD)

2. Executive Summary

- 2.1. Fact Sheet
- 2.2. Geopolitical Environment
- 2.3. The Saudi HLS-HLD Infrastructure
- 2.4. Major Findings
- 2.5. Major Conclusions
- 2.6. Major Forecasts
- 2.7. Saudi HLS-HLD Market Segments Outlook 2009-2018

3. Saudi HLS-HLD Market Drivers

4. Saudi HLS-HLD Market Inhibitors

5. Saudi Arabia - Background

- 5.1. Country Profile
- 5.2. Political Structure
- 5.3. The Intra-Islamic Ideological Conflicts Threats to the Kingdom
 - 5.3.1. Saudi Perception of Regional Shia Influence
- 5.4. U.S. Saudi HLS-HLD Partnership
- 5.5. Saudi Arabia Economy Outlook 2009-2018
 - 5.5.1. Impact of Recession on HLS-HLD Security Market

6. The Saudi Government HLS-HLD Organization

7. Saudi Arabia HLS-HLD Market

- 7.1. Factors Shaping Saudi HLS-HLD Policy in 2008-2012
- 7.2. HLS-HLD Market Outlook 2009-2018
- 7.3. Saudi Arabia Total HLS-HLD Market Outlook 2007-2018

8. Ministry of Defense – HLD Market – 2008-2018

- 8.1. Saudi Arabia Army
- 8.2. Saudi Navy
- 8.3. The Saudi Air Force

9. Ministry of Interior – Counterterrorism Market – 2008-2018

- 9.1. The Saudi National Guard Counterterrorism Market 2009-2018
- 9.2. Paramilitary Forces

10. The Saudi Intelligence Community - Counterterrorism Market - 2009-2018

- 10.1. The General Intelligence Presidency
- 10.2. The Saudi Civil Intelligence

11. The Saudi Oil-Gas Industry Security Market - 2009-2018

- 11.1. Scope
 - 11.1.1. Oil Exports
 - 11.1.2. Major Oil-Gas Ports
 - 11.1.3. Saudi Major Domestic Petroleum Pipelines
 - 11.1.4. International Petroleum Pipelines
 - 11.1.5. Oil-Gas Shipping
- 11.2. The Saudi Oil-Gas Industry Security Market 2009-2018

12. Hajj (Pilgrimage): Annual Security Challenge – Business and Market Opportunities

- 12.1. The Hajj Security Strategy and Market Opportunities
- 12.2. What are the Main HLS Market Opportunities Associated with the Hajj?

13. Saudi Arabian Aviation Security Market Outlook - 2009-2018

- 13.1. Scope
- 13.2. Background
- 13.3. Major Findings
- 13.4. Saudi Aviation Security Market Drivers
- 13.5. Saudi Aviation Security Market Inhibitors
- 13.6. Saudi Arabian Aviation Security Market Outlook 2009-2018

14. Saudi Arabian Maritime Security Market – 2009-2018

- 14.1. Scope
- 14.2. Maritime Security Sub-Markets
- 14.3. Security of Oil Export Terminals
- 14.4. Saudi Maritime Security Market Development Forecast
- 14.5. Saudi Maritime Security Market Drivers
- 14.6. Saudi Maritime Security Market Inhibitors
- 14.7. Saudi Arabian Maritime Security Market 2009-2018

15. Saudi Arabian CBRN Mitigation Market Outlook – 2009-2018

- 15.1. Scope
- 15.2. Saudi Arabian CBRN Mitigation Market Investment Forecast –2009-2018
- 15.3. Saudi CBRN Mitigation Market Drivers
- 15.4. Saudi CBRN Mitigation Market Inhibitors
- 15.5. Saudi Arabian CBRN Mitigation Market Outlook 2009-2018

16. Saudi Arabia Counter Terror Intelligence Community Market – 2009-2018

- 16.1. Scope
- 16.2. Major Findings
- 16.3. Saudi Intelligence Community Market Drivers
- 16.4. Saudi Intelligence Community Market Inhibitors
- 16.5. Saudi Arabia Counter Terror Intelligence Community Market 2009-2018

17. Saudi Arabia Border & Perimeter Security Market - 2009-2018

- 17.1. Scope
- 17.2. Perimeter Protection Market
 - 17.2.1. Saudi Perimeter Protection Market
 - 17.2.2. Saudi Border Protection Market
- 17.3. Saudi Border & Perimeter Security Market Drivers
- 17.4. Saudi Border & Perimeter Security Market Inhibitors
- 17.5. Saudi Arabia Border & Perimeter Security Market 2009-2018

18. Saudi Arabia HLS-HLD IT, Cybersecurity and Software Market - 2009-2018

- 18.1. Scope
 - 18.1.1. Cyber Threat and Technology Assumptions
- 18.2. Saudi HLS-HLD IT, Cybersecurity and Software Market Drivers
- 18.3. Saudi HLS-HLD IT, Cybersecurity and Software Market Inhibitors
- 18.4. Saudi Arabia HLS-HLD IT, Cybersecurity and Software Market 2009-2018

19. First Responders Market – 2009-2018

- 19.1. Scope
- 19.2. Saudi First Responders Market Drivers
- 19.3. Saudi First Responders Market Inhibitors
- 19.4. First Responders Market 2009-2018

20. Critical Infrastructure Protection Market - 2009-2018

- 20.1. Scope
- 20.2. Fourteen (14) Critical Infrastructure Protection Market Sectors of

Saudi Arabia in a Snapshot

- 20.2.1. Oil & Gas Industry
- 20.2.2. The Saudi Nuclear Energy Program
- 20.2.3. Water and Electric Utilities
- 20.2.4. Railway Transportation Security
- 20.2.5. Banking Sector
- 20.2.6. IT / Telecom Sector
- 20.3. Saudi Critical Infrastructure Protection Market Drivers
- 20.4. Saudi Critical Infrastructure Protection Market Inhibitors
- 20.5. Critical Infrastructure Protection Market 2009-2018

21. Saudi Arabia HLS-HLD RFID & Biometrics Market - 2009-2018

- 21.1. Scope
- 21.2. Saudi RFID & Biometrics Market Drivers
- 21.3. Saudi RFID & Biometrics Market Inhibitors
- 21.4. Saudi Arabia HLS-HLD RFID & Biometrics Market 2009-2018

22. Saudi Arabia Private Sector HLS Market Forecast - 2009-2018

- 22.1. Scope
- 22.2. Seven Private Sector HLS Market Segments
 - 22.2.1. Saudi Arabia Private Sector Electrical Utility Industry
 - 22.2.2. Banking and Financial Industry
 - 22.2.3. 2008-2018 Private Sector Security Business Opportunities
- 22.3. Saudi Private Sector HLS Market Drivers
- 22.4. Saudi Private Sector HLS Market Inhibitors
- 22.5. Saudi Arabia Private Sector HLS Market Forecast 2009-2018

23. Companies Active in Saudi HLS-HLD Market

- 23.1. BAE Systems plc
- 23.2. The Boeing Company
- 23.3. Raytheon Company
- 23.4. EADS N.V.
- 23.5. Finmeccanica S.p.A
- 23.6. Thales Group
- 23.7. Lockheed Martin
- 23.8. Northrop Grumman Corporation
- 23.9. L-3 Communications Holdings, Inc.
- 23.10. Science Applications International Corporation (SAIC)
- 23.11. General Dynamics Corporation

24. Appendix A: Saudi Arms Deals

- 24.1. Saudi Arabia: U.S. Arms Sales
- 24.2. Saudi Arabia: UK Arms Sales
- 24.3. Total Arms Purchases by Saudi Arabia 1999 2006

25. Appendix B: Key Contacts in the Saudi Bio-Defense Market

25.1. The Six Most Prominent Decision Makers in the Saudi Arabian Bio-terror Mitigation Sector are:

26. Appendix C - Doing Business in Saudi Arabia

- 26.1. Direct Exports
- 26.2. Export Documentation Requirements
- 26.3. Customs Duties
- 26.4. Commercial Agents
- 26.5. Franchising
- 26.6. Branch Offices
- 26.7. Direct Foreign Investment

- 26.8. Licensed Insurers
- 26.9. Taxation
 - 26.9.1. Residents and Non-residents Taxation (Personal)
 - 26.9.2. Corporation Tax
 - 26.9.3. Zakat (religious wealth tax)
- 26.10. Useful Websites

List of Tables

2. Executive Summary

- Table 1 Saudi Government and Private Sector HLS, HLD and Counter Terror Intel Outlay [\$ Billion] 2007-2018
- Table 2 Saudi Government and Private Sector HLS-HLD Market Outlook by Sector
- Table 3 HLS-HLD Market Forecast [\$ Billion] by Ten Sub Markets 2008-2018Error! Bookmark no

5. Saudi Arabia – Background

Table 4 – Budget Allocations to Critical Infrastructure Sectors [\$ Million] – 2002-2008

7. Saudi Arabia HLS-HLD Market

- Table 5 Saudi Arabia Government and Private Sector HLS, HLD and Counter Terror Intel. Outlay [\$ Billion] 2007-2018
- Table 6 Saudi Arabia HLS-HLD Outlays as [%] of "Total Defense" Outlay 2007-2018
- Table 7 Saudi Arabia HLS-HLD Market Sectors Outlook [\$ Billion] 2007-2018
- Table 8 Saudi Arabia HLS-HLD Market Sectors as [%] of Saudi HLS-HLD Outlay

8. Ministry of Defense – HLD Market – 2008-2018

- Table 9 Saudi Military Airfields
- Table 10 The Saudi Armed Forces HLD Outlay and Markets Outlook [\$ Billion] 2008-2018

9. Ministry of Interior - Counterterrorism Market - 2008-2018

- Table 11 The Saudi Ministry of Interior HLD Outlay and Markets Outlook [\$ Billion] 2008-2018
- Table 12 The Saudi National Guard HLS Outlay and Markets Outlook [\$ Billion] 2008-2018

10. The Saudi Intelligence Community - Counterterrorism Market - 2009-2018

- Table 13 Saudi Arabia Counter Terror Intelligence Services Outlay
 [\$ Billion] 2007-2018
- Table 14 Saudi Arabia Intelligence Community HLS Outlay and Market as [%] of GDP

11. The Saudi Oil-Gas Industry Security Market - 2009-2018

- Table 15 Saudi Arabia Private Sector Oil-Gas Market Outlook [\$ Billion] 2007-2018
- Table 16 Saudi Arabia Private Sector Oil-Gas Market as [%] of HLS-HLD Market

13. Saudi Arabian Aviation Security Market Outlook – 2009-2018

Table 17 – Saudi Civil Airfields

- Table 18 Seven Saudi Arabian Aviation Security Market Sub-Sectors Market Prospects Snapshot
- Table 19 Saudi Arabia Aviation Security Market Outlook [\$ Billion] 2007-2018Error! Bookmark no

14. Saudi Arabian Maritime Security Market Outlook – 2009-2018

- Table 20 Total Cargo Handled in All Saudi Ports in 2007, [Million Metric Tons]
- Table 21 Saudi Arabia Maritime Security Market Outlook [\$ Billion] 2007-2018

15. Saudi Arabian CBRN Mitigation Market Outlook - 2009-2018

- Table 22 Saudi Arabia Population Distribution in Major Cities
- Table 23 Saudi Arabia CBRN Mitigation Market Outlook [\$ Billion] 2007-2018

16. Saudi Arabian Counter Terror Intelligence Community Market Outlook – 2009-2018

Table 24 – Saudi Arabia Counter Terror Intelligence Community Market Outlook [\$ Billion] – 2007-2018

17. Saudi Arabian Border & Perimeter Security Market Outlook - 2009-2018

Table 25 – Saudi Arabia Border & Perimeter Security Market Outlook [\$ Billion] – 2007-2018

18. Saudi Arabian HLS-HLD IT, Cybersecurity a Software Market Outlook – 2009-2018

- Table 26 Snapshot of Saudi Society in Information Age 2008 Data
- Table 27 Saudi Arabia HLS-HLD IT Cybersecurity and Software Market Outlook [\$ Billion] 2007-2018

19. Saudi Arabian First Responders Market Outlook – 2009-2018

Table 28 – Saudi Arabia First Responder's Market Outlook [\$ Billion] – 2007-2018

20. Critical Infrastructure Protection Market Outlook - 2009-2018

- Table 29 Criteria for Prioritizing Budgets for CIP
- Table 30 A Snapshot of the 14 Critical Infrastructure Protection Market Sectors of Saudi Arabia
- Table 31 Saudi Arabia Critical Infrastructure Protection Market Outlook [\$ Billion] 2007-2018

21. Saudi Arabian AHLS-HLD RFID & Biometrics Market Outlook – 2009-2018

Table 32 – Saudi Arabia RFID & Biometrics HLS Market Outlook [\$ Billion] – 2007-2018

22. Saudi Arabian Private Sector HLS Market Forecast - 2009-2018

- Table 33 Seven Private Sector HLS Market Segments
- Table 34 Saudi Arabia Private Sector HLS Market Outlook [\$ Billion] 2007-2018

24. Appendix A – Saudi Arms Deals

Table 35 – Total Arms Purchases by Saudi Arabia (\$M) – 1999-2006

List of Figures

1. Scope, Methodology and Assumptions

- Figure 1 The Four Terror Threat Categories
- Figure 2 The Saudi HLS-HLD Interplay

2. Executive Summary

- Figure 3 Saudi Arabia Fact Sheet
- Figure 4 HLS-HLD National Outlay per Capita [\$/Year] Saudi Arabia vs. the USA and the EU 2008
- Figure 5 Three Tiers of Saudi HLS-HLD Infrastructure
- Figure 6 HLS-HLD Cumulative Market [\$ Billoin] Saudi Arabia vs. USA., UK, China and Germany 2007-2018
- Figure 7 HLS-HLD Market as [%] of GDP: Saudi Arabia vs. USA, UK, China and Germany 2007
- Figure 8 HLS-HLD Market as [%] of GDP: Saudi Arabia vs. USA, UK, China and Germany 2018
- Figure 9 Total HLS-HLD Market [\$ Billion] by Segments 2009-2018
- Figure 10 Total HLS-HLD 10 Market Segments CAGR [%] 2008-2018

5. Saudi Arabia - Background

- Figure 11 Saudi Arabia Map
- Figure 12 Saudi Arabia Country Profile 2008
- Figure 13 Saudi Budget Surplus / Deficit
- Figure 14 Saudi Government Budget Spending 2000-2009
- Figure 15 Saudi Domestic Debt
- Figure 16 Saudi Arabia Defense and HLD Outlay Outlook [%]
- Figure 17 Saudi Arabia Defense & HLD Outlay [\$ Billion] 2007-2018

6. The Saudi Government HLS-HLD Organization

- Figure 18 The Saudi 8-Tiered Terror Mitigation Responsibilities
- Figure 19 The Saudi Government HLS-HLD Organization Chart

7. Saudi Arabia HLS-HLD Market

- Figure 20 Saudi Government and Private Sector HLS, HLD and Counter Terror Intelligence Outlay by Sector 2008 & 2018
- Figure 21 Saudi Arabia Government & Private Sector HLS-HLD Outlay [\$ Billion] by Sector 2007-2018 Outlook
- Figure 22 Saudi Arabia Government and Private Sector HLS-HLD Market Outlook by Sectors 2008 & 2018
- Figure 23 Saudi Arabia Government & Private Sector HLS-HLD Outlay Outlook as [%] of Saudi Arabia "Total Defense" – 2007-2018
- Figure 24 Saudi Arabia HLS-HLD Markets Outlook [\$ Billion] by Activity 2008-2018
- Figure 25 Saudi Arabia HLS-HLD Sectors as [%] of Saudi HLS-HLD Outlay

8. Ministry of Defense – HLS MArket – 2008-2018

Figure 26 – The Saudi Armed Forces HLD Outlay and Markets Outlook [\$ Billion] – 2008-2018

9. Ministry of Interior – Counterterrorism Market – 2008-2018

Figure 27 – The Saudi Ministry of Interior HLD Outlay and Markets Outlook [\$ Billion] – 2008-2018

Figure 28 – The Saudi National Guard HLS Outlay and Markets Outlook [\$ Billion] – 2008-2018

10. The Saudi Intelligence Community – Counterterrorism Market – 2008-2018

Figure 29 – The Structure of the Saudi General Intelligence Presidency

Figure 30 – Saudi Arabia Intel. Community Services Outlay Outlook

Figure 31 – Saudi Arabia Intel. Community Counter Terror Outlay [\$ Billion] – 2007-2018

Figure 32 – Saudi Arabia Counter Terror Intel. Outlay as [%] of GDP

11. The Saudi oil-Gas Industry Security Market – 2009-2018

Figure 33 – Saudi Oil and Gas Fields

Figure 34 – Saudi Arabia Private Sector Oil-Gas Market Outlook [\$ Billion] – 2007-2018

Figure 35 – Saudi Arabia Private Sector Oil-Gas Market as [%] of HLS Market

Figure 36 – Saudi Arabia Private Sector Oil-Gas Market as [%] of HLS-HLD Market

12. Hajj (Pilgrimage): Annual Security Challenge – Business and Market

Figure 37 - Muslim Pilgrims Circle the Holy Kaaba in Mecca

13. Saudi Arabian Aviation Security Market Outlook – 2009-2018

Figure 38 – Budget Allocation to Saudi Aviation [\$ Million] – 2002-2008

Figure 39 – The Saudi Civil Airports Map

Figure 40 – Saudi Aviation Security Threats Mitigation and Targets – 2018

Figure 41 – Multi-Modal People Screening Technology – Artist Perception

Figure 42 – King Khaled International Airport

Figure 43 - Saudi Aviation Security Market - SWOT Analysis

Figure 44 – Saudi Aviation Security Market Competitiveness Analysis

Figure 45 – Saudi Arabia Aviation Security Market Outlook [\$ Billion] – 2007-2018

14. Saudi Maritime Aviation Security Market Outlook – 2009-2018

Figure 46 – Budget Allocation to Saudi Seaports [\$ Million] – 2002-2008

Figure 47 – Total Cargo Handled in All Saudi Ports in 2007

Figure 48 – Ras Tanura Oil Export Terminal – One of the World's Oil Choke Points Error! Bookmark I

Figure 49 – A Saudi LNG Terminal

Figure 50 – Global Maritime Oil Flows and Strategic Shipping Chokepoints

Figure 51 – X VLCC Takayama After Attack in the Gulf of Aden

Figure 52 – Maritime Containers Security "Food Chain"

- Figure 53 Strait of Hormuz World Oil Transit Chokepoint
- Figure 54 Strait of Hormuz Width at Narrowest Point 21 Miles
- Figure 55 Saudi Maritime Security Market SWOT Analysis
- Figure 56 Saudi Maritime Security Market Competitiveness Analysis
- Figure 57 Saudi Arabia Maritime Security Market Outlook [\$ Billion] 2007-2018

15. Saudi Arabian CMarket Outlook – 2009-2018

- Figure 58 CBRN Mitigation Market
- Figure 59 Casualties from Nuclear and Biological Release
- Figure 60 Saudi CBRN Mitigation Market SWOT Analysis
- Figure 61 Saudi CBRN Mitigation Market Competitiveness Analysis
- Figure 62 Saudi Arabia CBRN Mitigation Market Outlook [\$ Billion] 2007-2018

16. Saudi Arabian Counter Terror Intelligence Community Market – 2009-2018

- Figure 63 Saudi Intelligence Community Market SWOT Analysis
- Figure 64 Saudi Intelligence Community Market Competitiveness Analysis
- Figure 65 Saudi Arabia Counter Terror Intelligence Community Market Outlook [\$ Billion] 2007-2018

17. Saudi Arabian Borders & Perimeter Security Market Outlook - 2009-2018

- Figure 66 Perimeter of the Dhahran International Airport
- Figure 67 Saudi Arabia Yemen Border
- Figure 68 Border & Perimeter Protection on Combined Use of Physical Barriers and Surveillance & Electronic Detection Means
- Figure 69 Saudi Borders & Premier Security Market SWOT Analysis
- Figure 70 Saudi Border & Perimeter Security Market Competitiveness Analysis
- Figure 71 Saudi Arabia Borders and Perimeter Security Market Outlook [\$ Billion] 2007-2018

18. Saudi Arabian HLS-HLD IT, Cybersecurity and Software Market - 2009-2018

- Figure 72 Saudi Telecom Roadmap
- Figure 73 Establishing Saudi CERT (Computer Emergency Readiness Team)
- Figure 74 Saudi IT, Cybersecurity and Software Market SWOT Analysis
- Figure 75 Saudi Cybersecurity and Software Market Competitiveness Analysis
- Figure 76 Saudi Arabia HLS-HLD IT, Cybersecurity and Software Market Outlook [\$ Billion] 2007-2018

19. First Responders Market – 2009-2018

- Figure 77 Saudi 1st Responders Require Oil-Gas Incidence-Specific Means and Methods
- Figure 78 Saudi First Responders Market SWOT Analysis
- Figure 79 Saudi First Responders Market Competitiveness Analysis
- Figure 80 Saudi Arabia First Responder Security Market Outlook [\$ Billion] 2007-2018

20. Critical Infrastructure Protection Market – 2009-2018

- Figure 81 The Layered Critical Infrastructure Protection
- Figure 82 Saudi Landbridge Project
- Figure 83 Mecca-Medinah Rail Project
- Figure 84 Saudi Critical Infrastructure Protection Market SWOT Analysis
- Figure 85 Saudi Critical Infrastructure Protection Market Competitiveness Analysis
- Figure 86 Saudi Arabia Critical Infrastructure Protection Market Outlook [\$ Billion] 2007-2018

21. Saudi Arabian HLS-HLD RFID & Biometrics Market - 2009-2018

- Figure 87 Active RFID Tag
- Figure 88 Saudi RFID & Biometrics Market SWOT Analysis
- Figure 89 Saudi RFID & Biometrics Market Competitiveness Analysis
- Figure 90 Saudi Arabia RFID & Biometrics HLS Market Outlook [\$B] 2007-2018

22. Saudi Arabian Private Sector HLS Market Forecast - 2009-2018

- Figure 91 Saudi Private Sector Market SWOT Analysis
- Figure 92 Saudi Private Sector Market Competitiveness Analysis
- Figure 93 Saudi Arabia Private Sector HLS Market Outlook [\$ Billion] 2007-2018