The United Arab Emirates ICT sector and Dubai’s Knowledge Economy:

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See: “UAE’s Next Challenge: Knowledge-based Economy”:
Ovais Subhani:

“The term “knowledge-based economy”, a post-industrial phenomenon evident in some Western and East Asian economies, stems from recognition of knowledge as the main driver of productivity and economic growth in a modern economy, leading to a new focus on the role of information, technology and learning in economic performance, beyond the traditional focus on labour, capital, materials and energy...

In a knowledge-based economy, innovation is driven by the interaction of producers and users in the exchange of both codified and tacit knowledge. This interactive model replaces the traditional linear model of innovation. The relationship between the industry, the government and the academia in the development of science and technology becomes an important economic determinant...

The transition to a knowledge-based economy would depend on a policy environment that emphasises on intelligent planning for both the immediate future and the long-term, good public health and education, open labour markets, free and fair trade, and good governance and economic management.

The government should itself lead investment in research and development of technologies in universities and research institutes, and academia should be...
encouraged to have private sector partners for innovative as well as financial purposes...

According to new growth theories, knowledge can raise the returns on investment, which can in turn contribute to the accumulation of knowledge. It does this by stimulating more efficient methods of organising production as well as new and improved products and services. This creates the possibility of sustained increases in investment which can lead to continuous rises in a country's growth rate. Knowledge can also spill over from one firm or industry to another, with new ideas used repeatedly at little extra cost. Such spillovers can ease the constraints placed on growth by scarcity of capital.

Investments in knowledge can increase the productive capacity of the other factors of production – labour, capital materials and energy – as well as transform them into new products and processes. And since these knowledge investments are characterised by increasing, rather than decreasing returns, they are the key to long-term economic growth and prosperity."

[1]: Dubai Government ICT Policy:

The UAE and Dubai governments – concluding that an advanced ICT infrastructure is an essential to attract foreign investment and to broaden the economy – have maintained open and progressive policies towards ICT technology adoption – whether in schools, homes, business’s or government.

This can be seen in:

- A National Telecom Policy to advance development and innovation within the UAE and especially Dubai – and which sets out a national Telecommunications development plan for 2006 - 2010 aimed at developing the country as a regional Information and Communication Technology hub.
- The promotion of ICT in the UAE is specifically provided for in the ICT Development Fund – a dedicated fund to support ICT entrepreneurial development in the UAE.
- The ICT sector has received direct Dubai government investment in ICT infrastructure projects such as TECOM [Dubai Technology E-Commerce and Media Free Zone – and Silicon Oasis.

The UAE government does exercise censorship over the internet - using SmartFilter filtering software to block pornography, gambling, religious conversion, and illegal drugs sites.

The Telecom plan is known as the General Policy for the Telecommunication Sector [GTP] – and proceeds on the basis that ICT is having transformational effects on industries such as trade, financial services, technology-based services, tourism, media, education, oil, manufacturing, transportation and health services – and a modern competitive telecommunications sector is integral part of economic development.

The GTP policy is published online at: http://www.tra.ae/pdf/legal_references/national_telecom_policy_uae.pdf

The policy asserts 5 key objectives.
3.1 Establish Policies and Regulatory Framework - The Government will establish a regulatory and policy framework that facilitates the development of the country’s telecommunications and ICT infrastructure and services in order to meet national, regional and international objectives.

3.2 Promote and Develop New Technologies - The Government will promote the use of new technologies in the UAE.

3.3 Become the Regional ICT Hub - The Government will support the development of the UAE as a regional ICT and telecommunications hub.

3.4 Develop the Country’s Human Capital - The Government will facilitate the development of human capital in the telecommunications and ICT sector to meet the demands of the economy, serving both local and regional requirements.

3.5 Encourage Research and Development - The Government will encourage research and development activities within an integrated complex, and establish relationships with international academic institutions.

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The UAE as one of the world's wealthiest and most technologically advanced countries – is also the ‘most wired state in the Arab world’ – and leads Arab countries in meeting the goals set by UNESCO’s ‘Education For All’ programme – with an overall adult illiteracy rate of 10%.

Today the UAE provides internet coverage for 50% of its population – although Dubai being mainly urban would be higher - that percentage compares to 22% in Qatar – 14% in Oman - and less than 7% in Egypt - according to data from the research firm Arab Advisors Group.

With a combination of a comparatively low illiteracy rate - and a sustained government investment in ICT infrastructure and education - the UAE is well placed to continue to develop and maintain a future workforce in IT.

At the primary and secondary level both private and public schools have specialist "IT Teachers" as part of their staff.

In the tertiary system the country has a - 14 college network known as the Higher Colleges of Technology.

In 2006 the number of students in higher education in the UAE was 85,200 – and of this number 13% were enrolled in ICT related courses.

Many ICT companies – including Microsoft, Cisco Systems and Shell through their Intilaqah entrepreneurship program have entered into partnerships with the 14 colleges - to provide training and development programs.

Industry links have led to the establishment of a commercial branch of the 14 Colleges - the Center of Excellence for Applied Research and Training [CERT] – which is involved in strategic alliances with a number of multinational organizations to collaborate on a full range of business and technology research and application.

[b]: IT Education Project:

Another important computer training initiative, the IT Education Project [ITEP] - was launched by the Dubai Ruler - Sheikh Mohammed bin Rashid Al Maktoum - in 2000 as part of the
strategic plan to establish Dubai as the knowledge hub of the region.

ITEP started in the year 2000 - training first-year and second-year secondary Dubai school students in IT – and over 30,000 secondary school students have participated in the Project – which provides a high quality, industry-relevant, IT education.

The creation of the new Dubai Education Council is an indication of the commitment of the government to integrating IT into education as the key to developing a successful economy - as well as modernising the education system.

[c]: Online Education:

The United Nations Development Programme’s [UNDP] academic subject review project has identified the UAE as the most advanced e-learning country in the region – and AUST has been selected as the UAE’s quality university on computer sciences.

Moeya: The UAE Ministry of Education has also created a single educational portal for both elementary and secondary school students in both public and private school.

Moeya - http://www.moeya.ae - has a variety of news and information for school age children and links into many other resources available to children through their school.

[d]: Etisalat Academy:

Etisalat – the national Telecommunications carrier - has established a college to provide a corporate training program for their technicians and employees - and other high tech companies in the region: http://www.eacademy.ae

The academy is the first school in the Middle East established to test, certify and approve "IT Security" engineers and experts with the International American Authority for Information Technology Security.

[e]: Women and ICT Sector:

In 1996 the UAE signed and international agreement that provided for equality in pay and job access between male and female workers in the country.

Unlike some neighbouring countries where women's education isn't encouraged - women in the UAE are accorded the same opportunities as men when it comes to education – and women IT workers in the federal government actually outnumber men – by 55.6% to 44.4%.

[f]: e – Government:

In April 2001 the Dubai Ruler Sheikh Mohammed announced his “E-Government” plan - for all government offices in Dubai to move to a paperless office environment - and provide as many services as possible online – so that administrative tasks like registering a new car or updating a license can be completed without visiting government offices.

[g]: National Web Portal:

The UAE has established a national Web Portal where citizens, residents, and contractors can access a large number of e-resources from the government. The Portal is at: http://www.government.ae/gov/en/index.jsp

The portal is a central store of government information - with yellow pages, lists of emergency numbers, links to government offices and electronic forms.

The e-Dirham system - one innovation on the government portal – is a Payment Tool devised by the Ministry of Finance & Industry in 2001 to enable the collection of Revenues – thereby providing the Government with a Secure Payment Method – and the public with a convenient payment tool.

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The UAE and Dubai governments are focused on the Information Age both to provide access and connectivity for its citizens and residents – and to capitalise on their location to provide both regional and international ICT structures.

[a]: Telecommunications:

A modern efficient Telecommunications system - fundamental to economic, social and cultural development – is well established in Dubai and the UAE.

**Emirates Telecommunications Corporation** – known as Etisalat - is the main UAE telecommunications carrier – and was set up in 1976 and has subsequently invested extensively in a world-class telecommunications network throughout the country - including mobile and landline phones – Internet - and other telecommunications services.

This strategy has placed the company in the worlds 500 richest companies in the world in terms of market capitalisation - one of only three Arab companies listed in this **Financial Times Index** category.

After the UAE oil sector - Etisalat is the highest single contributor to federal funds in the country – paying over AED2.5 billion a year to the Federal Government plus a AED900 annual dividend.

A publically listed company – with a 60% government shareholding - Etisalat had a monopoly on the telecom infrastructure in the country – but had consistently implemented new technology. In 2006 the government authorized Du - a second telecom provider - to enter the market – and to date its participation has been primarily in the provision of first class telecom infrastructure in Dubai’s new free zones.

Du is 40% owned by the UAE government - 20% owned by Mubadala Development - 20% owned by the **Emirates Telecommunications and Technology Ltd** a new subsidiary of the Dubai Government owned free zone operator - **Dubai Technology & Commerce and Free Zone Authority [TECOM]** – and the residual 20% of the company is owned through publicly listed shares on the **Dubai Financial Market**.

At present Etisalat is completing the upgrading of their entire fixed line service architecture to a **Next Generation Network** – which will enable the company to offer voice, video and data over a single source connect.

**Mobile subscribers** exceeded 4.5 million by the end of 2005 - which represents a market penetration of more than 100%.

Internet and broadband penetration is about 60% - and Etisalat has concluded roaming agreements with over 265 operators. EIM figures for 2002 show most Internet users in the UAE to be both young and well educated.

[b]: Venture capital:

Before the establishment of the DIFC access to venture capital in Dubai was difficult for young entrepreneurs.

For this reason the government set up a US$190 million venture capital fund under the **Mohammed Bin Rashid Establishment for young Business Leaders** to provide finance and resources to young entrepreneurs.

The scheme offers incubator like services such as:

- counselling,
- connectivity,
- business space,
- training,
- and a recommended supplier network.

[c]: Intellectual Property Protection:

The **World Intellectual Property Rights Organization** – a UN agency set up in 1967 to maintain an international intellectual property protection system - lists the UAE as a member of the following IP treaties:
The following IP treaties:

- Berne Convention
- Paris Convention
- PCT
- Rome Convention
- WCT
- WIPO Convention
- WPPT

[d]: Software Piracy:

UAE Software Piracy has remained at 34% since 2003 - according to the Business Software Alliance’s Third Annual BSA and IDC Global Software Piracy Study published 2006 – which represents a market decrease from 44% in 2001 – and gives UAE the 17th lowest piracy rate on the globe and the second lowest in the Middle East behind Israel’s 32% rate.

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[a]: Overview:

Dubai and the UAE government’s strong support for the ICT sector- has contributed to rapid and extensive growth in the gulf region as follows:

- The IT market expanded from US$ 6.9 billion in 2003 to over US$ 9.5 billion in 2005.
- The Internet and software solutions markets in the Gulf grew at double the rate of Europe.
- The region has experienced a ten-fold increase in internet penetration during 1995 – 2005.
- Growth in PC sales across the GCC [Saudi Arabia, UAE, Kuwait, Oman and Qatar] in 2005 has increased by 42.7%.
- By 2010 ICT spending in the GCC states is expected to surpass US$10.10 billion.

[b]: ICT Development Fund:

In 2005 the UAE launched an ICT initiative – known as the “ICT Development Fund” to advance the adoption and expansion of ICT usage in the country – with the gaol of positioning the UAE amongst the most advanced ICT nations in the World.

The objectives of the Development Fund are:

- to develop the countries ICT industry,
- to support R&D,
- to encourage capacity building,
- to enhance ICT education and training,
- and to sponsor and organize ICT-related events and partner with leading international R&D institutions.

A first for the Middle East – the Fund works with research institutions, ICT sector companies, education institutions, and ICT vendors.

The fund is financed by payments of 1% of revenues of the primary licensed operators in the ICT sector – government grants - returns from ICT Fund investments, patent income - and other intellectual property arising from ICT Fund projects.

[c]: Telecommunications Production:

In addition to its virtual monopoly position in the UAE - Etisalat is also expanding overseas through company acquisitions and new telecom ventures in the Middle East and Africa through the following vehicles:
- **Comtrust** - the first comprehensive e-commerce infrastructure provider in the Middle East region offers a comprehensive range of affordable end-to-end e-commerce solutions.

- **Ebtikar** - Etisalat’s specialist card manufacturing division is an advanced unit set up in 1996 to tap the rapidly growing card/applications market in the Middle East – and has its own manufacturing and personalisation centre for a variety of memory, microprocessor and magnetic cards. These cards have multimedia applications in telecommunications [pay phones, GSM, Internet, WAP], social security, banking, Internet access, and health etc.

- **Emirates Data Clearing House [EDCH]** - was set up in November 1994 to provide a single point of support in validating data to international standards required for roaming facilities provided by GSM 900 and 1800 network operators.

- **Emirates Internet Exchange [EMIX]** - is the first network access point [NAP] to be set up in the region. Built on multiples of STM-1 circuits worldwide, EMIX is designed to meet carriers and ISPs’ requirements for dependable internet access. EMIX is built on a modern platform, designed for the transport of high-quality, high-speed Internet service and can provide customers with flexibility of bandwidth on demand.

- **Emirates Internet & Multimedia [EIM]** - Cognisant that the Internet would quickly become the fastest growing segment in the telecommunications industry – in March 2000 Etisalat launched a dedicated Internet and Multimedia Unit and this is now the primary Internet service provider in the UAE.

[d]: **Hardware Production:**

Most future UAE hardware production will be based in Dubai - in **Dubai Silicon Oasis** [DSO] – which is a free zone established to develop a technology park to foster electronic innovation, research and development.

This technology park will specialize in the research and production of **microchips** – optical and solar technology – and **semiconductor technology**.

[e]: **Software Production:**

Most software production in Dubai takes place in the well established free zone - **Dubai Internet City** – where major global software manufacturers such as **Microsoft, Oracle, HP, IBM, Dell, Siemens, Canon, Logica, Sony Ericsson, Schlumberger and Cisco** – have set up local and regional bases.

[f]: **B2B e-Marketplace:**

In June 2000 - **Tejari** was established as a strategic initiative of the Dubai Government to provide a **B2B eCommerce platform** for the region.

“**Tejari**” means **Trade** or Commerce in Arabic. The objective of Tejari was to become the sole point of online trade for businesses operating in the UAE and the region. Companies that sell goods and services through Tejari can:

- search online catalogues,
- create RFPs,
- receive and awards business online
- and perform spot purchases.

One of Tejari’s most important achievements was to move all Government Departments in Dubai - and many leading private sector organizations to complete their procurement with suppliers as an online process.

Tejari’s focus on government and private sector contracts and tendering procedures – during a period of rapid time precious development – has enabled both national and international companies to obtain easier and more efficient access to participation in development projects.

Use of the Internet among regional procurement agencies is accelerating - with 20% of Gulf organisations now engaged in online procurement.

Today - **Tejari** serves customers with products and services in 5 other countries as well as the UAE.

The charts below set out **Tejari’s impressive growth pattern:**

Quarterly growth of Tejari members in 5 years | Annual growth of transactions conducted through Tejari
Online Marketing:

The **global e-commerce market** is now measured in double figure trillions of which 2% is forecasted growth for the Middle East – of which the largest share will accrue to Dubai.

Each year the average gulf resident purchases US$1068 worth of goods and services online annually, compared to an annual purchase amount of US$1314 in the US, US$1072 in the UK, and US$875 in Germany.

**UAEmall.com** - similar in format to **Ebay** - the global auction website - is another growing e-commerce website in the UAE – and also provides a ‘buy now’ or ‘make your best offer’ option on a wide range of goods.

It is particularly popular for buying and selling second hand cars and goods – but merely introduces buyers and sellers rather than selling direct.

The Dubai based site - has over 3500 sellers registered with it from all over the world - including the USA, Europe and local gulf countries.

[g]: *Dubai’s ITC Zones and Business Parks:*

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1: **Overview:**

Most ICT development initiatives in the UAE are located in the umbrella entity – the **Dubai Technology and Media Free Zone [TECOM]** - which was established in 2000 as part of the emirate’s policy to transform itself into a knowledge economy and become a regional centre for technology, e-commerce, and media.

The **TECOM** zone was established in Dubai as a designated tax-free zone with four main hubs:

- **The Dubai Internet City** for information and communications technology companies,
- **Dubai Media City** for media companies,
- **IMPZ** for print and publishing companies,
- **The Knowledge Village** providing education and training for knowledge-focused companies.
- **An Outsourcing Zone** was added to the Technology and Media Free Zone to capitalize on the countries strategic position to establish outsourcing operations in the region.

Other Dubai specialist ICT zones include:

- **Dubai Techno Zone:**
- **Dubai Silicon Oasis:**
- **DuBiotech:**

2: **Dubai Internet City:**
Dubai Internet City [DIC] provides a Knowledge Economy Ecosystem specifically designed to support the business development of Information and Communications Technology companies in Dubai and the ME region – and has the Middle East’s biggest ICT infrastructure built inside a free trade zone.

The DIC’s geographic location enables companies to reach and benefit from proximity to emerging markets in the Middle East - the Indian subcontinent, and northern Africa – involving an area encompassing 2 billion people with a $6.7+ trillion GDP.

Sectors represented in the cluster include:

- Software Development,
- Business Services,
- Web Based and e-Commerce,
- Consultancy,
- Sales and Marketing
- and Back Office Operations.

DIC provides an environment that attracts most elements of the value chain for an ICT business.

ICT Global giants including: Microsoft, Oracle, HP, IBM, Dell, Siemens, Canon, Logica, Sony Ericsson, Schlumberger and Cisco along with hundreds of other small foreign and local enterprises and entrepreneurial ventures have established a local or ME base within the DIC.

The international composition of the IC community is very diverse as the following graph
Over 1000 international companies are located at DIC – which is now almost fully occupied - and represents a formidable community of over 5500 knowledge workers spanning all facets of Information and Communications Technology - and offering all the benefits of a skills cluster – including business interaction – and networking opportunities for enhanced problem solving and knowledge sharing by the community members.

[3]: Dubai Media City:

A wide range of media organizations and businesses have established bases within the DMC zone covering:

- broadcasting,
- publishing,
- advertising,
- public relations,
- research,
- music,
- new media,
- and film production and post production.

Currently, there are:

At 28% - the advertising and marketing media sector - is the fastest growing - followed by publishing at 22% and media production at 15%. Television and broadcasting companies have a growing presence – with 23 active broadcasters now based in Dubai Media City.

The key global companies in DMC include:

- Reuters,
- CNN,
- CNBC,
- MBC,
- Sony,
- Bertelsmann,
- BMG,
- the Associated Press
- and McGraw Hill.

[4]: International Media Production Zone:

Launched in July 2003 - The International Media Production Zone [IMPZ] – is the first designated regional trade zone for media-related production activities.

The first production cluster of the zone will be focused on the printing industry, providing a complete infrastructure for print production including:

- land and pre-built printing offices,
- production and warehousing space,
- and communications and technology facilities.

Subsequent clusters will include:

- music,
The interaction within and amongst the various clusters is expected to generate enhanced creativity.

[5]: Dubai Knowledge Village:

Dubai Knowledge Village [KV] is a well connected specialist learning community that the Dubai government has established with the aim of "developing the region's talent pool and accelerating its move to the knowledge economy."

KV was established to develop Dubai into a regional and international venue for Knowledge education learners.

This education and training hub is also designed to complement the Free Zone’s other two clusters: Dubai Internet City and Dubai Media City – by providing facilities to train the future knowledge workers of the clusters.

Dubai Knowledge Village specifically promotes the development of scholarship, education, training, creativity, innovation and entrepreneurial expertise.

International organisations that have established operations in KV include:

- international accredited universities,
- professional training centres,
- e-learning bodies,
- education service providers,
- innovation centres,
- and certification and testing organisations.

[6]: Dubai Outsource Zone:

Dubai Outsource Zone (DOZ) - a member of TECOM Investments - provides a base for both captive and third-party outsourcing operations to provide mid and high-end services in areas such as finance, accounting, IT, payroll processing, engineering, R&D and also provides off-shore disaster recovery facilities.

DOZ is designed to meet off-shoring requirements from Europe, the US and the gulf region – and its custom-made facilities - including next-generation telecom infrastructure, office space in intelligent buildings, and facilities management - enable outsourcing companies to quickly establish efficient operations.

Doz’s package of telecom services include:

- reliable and redundant high-bandwidth connectivity,
- IP telephony,
- automatic call distribution [ACD],
- interactive voice response [IVR] and predictive dialing systems,
- satellite communication services
- and technical and infrastructure support.

These facilities form part of a plug-and-pay infrastructure which enable offshore service providers to commence operations quickly and with minimal upfront investment.

[7]: Dubai Silicon Oasis:

Dubai Silicon Oasis is a technology park - launched in Dubai in October 2002 by Sheikh Mohammed to provide a world class centre for electronic and semi conductor innovation, research, and development.

The project extends over 7 million square meters and has entered phase one of the construction which includes the construction of residential precinct with 560 detached villas.
The 7.2 km² master-planned community comprises:

- office towers,
- R&D and industrial zones,
- educational institutions,
- apartments and villas,
- hotels,
- healthcare
- and various lifestyle facilities.

[8]: Dubai Techno Park:

This Technology Park was designed to attract foreign investment in:

- research in oil and gas,
- desalination
- and environment management.

Construction of the first phase - comprising the infrastructure of the three square kilometer campus and the main office building – commenced in 2003.

The focus sectors of this park are:

- Advanced Engineering [material science],
- Agro-Food,
- Biotechnology [pharmaceuticals],
- Environment [desalination],
- Petroleum [oil and gas].

[9]: Dubiotech:

Dubai Biotechnology and Research Park – DuBiotech – is a hub fostering collaboration and innovation in the biotechnology, pharmaceuticals, and life sciences through research, education, and industry - nationally and internationally.

DuBiotech - upon completion - will cover 30 million square feet of built-up area – and is strategically located in a prime area of Dubai. The 22 million square feet Park is divided into zones that are dedicated to various initiatives and companies of all sizes from across the Life Science value chain with an emphasis on Research and Development.

The park caters for small incubators as well as regional offices of key biotechnology and pharmaceutical companies – and also provides manufacturing plants.

Dubiotech’s focus sectors are:

- Agro-Food [plant biotechnology],
- Biotechnology [pharmaceuticals, equine-related biotech, genetics, stem cell research],
- Environment, Health Care & Medicine [medical research, infectious diseases and forensic research].

[5]: Summary: Dubai’s ICT sector:

Dubai and the UAE’s early laser targeted investment in the ICT sector has been resolute and substantial – introducing industry focused IT education at primary and secondary levels – and abundant well resourced ICT degree courses at tertiary level – with the result that the population is among the most IT literate in the world with the best IT enabled work force in the region.

This is of major importance to the international employers who have chosen to make Dubai their Middle Eastern base or hub – and is a major reason why Dubai today has one of the most advanced knowledge economies in the world.

The UAE government’s immediate investment in the best available state of the art telecommunications infrastructure – has rapidly extended internet and telephone connectivity throughout the country – to ensure that UAE offices, schools, and homes are the best wired in the region.

But the ICT masterstroke has been Dubai’s creation of specialist ICT free zones - attracting the best and most highly skilled ICT companies in the world - and creating an army of specialist knowledge workers almost overnight in Dubai – thus enriching the emirates increasingly formidable intellectual assets – and ensuring the efficient future development of its education.
formidable intellectual assets – and ensuring the efficient future development of its education, government, business and other economic sectors.