



# The new frontier for Defence, Security and Resilience (DSR) in the Middle East

**Responding to the megatrends – an integrated approach to  
protection and preparedness**



# Table of contents



---

	<b>Introduction</b>	4
	<hr/>	
<b>1</b>	Defining defence, security and resilience	6
	<hr/>	
<b>2</b>	Structural forces reshaping defence, security and resilience in the Middle East	7
	<hr/>	
	<b>2.1</b> Technological disruption	9
	<hr/>	
	<b>2.2</b> Demographic shifts	11
	<hr/>	
	<b>2.3</b> A fracturing world	13
	<hr/>	
	<b>2.4</b> Social instability	15
	<hr/>	
	<b>2.5</b> Climate change	17
	<hr/>	
<b>3</b>	Looking ahead: From foundations to excellence	19
	<hr/>	
	<b>Contacts</b>	20
	<hr/>	



# Introduction

The Middle East is strengthening the foundations of national strength as governments across the region accelerate economic diversification, attract record levels of investment and build globally connected cities and industries.

As the region becomes more interconnected, both opportunity and exposure are increasing. Positioned at the centre of global trade flows, the Middle East is also seeing a surge in tourism, with major international events further elevating its global visibility. Yet these ambitions rely on a fundamental truth: people and capital only move where they feel safe. Defence, security and resilience are preconditions for the region's economic momentum – the foundations of confidence, continuity and sustained growth. In this context, Defence, Security and Resilience (DSR) has moved from a supporting function to a strategic imperative, one that underpins confidence, continuity, and sustained growth.

Given that the region faces evolving geopolitical dynamics, increasingly sophisticated cyber threats, and the accelerating pace of climate and technological change – the cost of disruption is significantly high. Under such circumstances, the continuity of essential services, resilience of infrastructure and integrity of digital and physical environments determine whether national progress can be sustained during periods of disruption.

For governments, communities and businesses in the region, DSR is central to protecting growth, safeguarding public trust and maintaining continuity at scale. Defence expenditure already exceeds US\$243 billion annually<sup>1</sup>. Policing and public-safety capacity continue to expand as national visions in key regional economies are reinforcing the resilience of energy, transport and digital networks. Yet the speed and complexity of change demand more than incremental investment. Protection and preparedness must operate as an integrated system, not as isolated capabilities.



The objective of this paper is to set out an integrated approach to protection and preparedness by examining how Defence, Security and Resilience (DSR) must evolve in response to the five defining megatrends that have implications for governments, communities and businesses.<sup>2</sup> Bringing together national defence, public security, and institutional resilience into a coherent DSR framework, the paper uses climate change, technological disruption, demographic shifts, a fracturing global order and social instability as an analytical lens to assess emerging risks and capability gaps. In doing so, it argues that preparedness can no longer be treated as a linear cycle of response and recovery but must instead be understood as an interconnected system of capabilities, enabled by coordinated policy, technology, and governance, to meet the Middle East's evolving risk landscape.



# Section 1

## Defining defence, security and resilience

Defence, security and resilience form a single preparedness backbone that enables countries to anticipate, withstand, and recover from disruption.

Defence refers to government services, policies, institutions and industrial bases dedicated to the protection of a nation's sovereignty. It encompasses capability development, procurement, logistics, modernisation, and the defence industrial and technological base that supplies equipment, platforms, and services.

**This cluster is primarily about the provision of military capability for national protection and deterrence; requiring strategies that integrate industrial policy and sustainment planning under a single national vision.**

Security encompasses the full spectrum of institutions, capabilities, and operations responsible for protecting the state, society, and individuals from internal and external threats, maintaining public order, and ensuring the rule of law. It integrates national security, intelligence, homeland security, public safety, policing, justice, and emergency response into a coherent domain focused on prevention, protection, enforcement, and response.

**This cluster ensures that threats - whether strategic, criminal, terrorist, cyber or civil - are anticipated, detected, mitigated and managed through coordinated security mechanisms, aligning national security and public safety institutions around shared outcomes.**

Resilience addresses the systemic capacity of governments, sectors, and societies to anticipate, prepare for, absorb, adapt to, and recover from shocks, including natural hazards, pandemics, geopolitical disruptions, technological failures, supply chain shocks, and hybrid threats. It covers risk planning, continuity of essential services, critical infrastructure protection and crisis coordination.

**This cluster focuses on central government policy, strategy, frameworks and whole-of-government coordination for national resilience; treating continuity as a national policy agenda, not just an operational function.**



## Section 2

### Structural forces reshaping defence, security and resilience in the Middle East

As global megatrends reshape the way we live and work, they are also redefining the demands placed on defence, security, and resilience institutions in the region. As the Middle East continues to grow and integrate with global systems, a set of structural forces has become increasingly consequential for national preparedness. These forces cut across every pillar of defence, security, and resilience, shaping how governments deter threats, protect people and assets, and adapt to disruption.



**Technological disruption** is driving the digitalisation of threats, along with rapid advances in automation, artificial intelligence, and autonomous systems, fundamentally changing how risks emerge, propagate, and must be countered.



**Demographic shifts**, particularly rapid urbanisation and population concentration, are increasing the complexity of safeguarding dense cities, critical infrastructure, and essential services.



**A fracturing world** is accelerating localisation pressures and supply-chain sovereignty, reshaping how nations secure access to critical resources, technologies, and logistics corridors.



**Social instability**, driven by evolving geopolitical dynamics, migration, and increased mobility, is placing new demands on border management, public safety, and social cohesion.



**Climate change** is intensifying environmental stress, amplifying the frequency and severity of natural hazards, and increasing the exposure of infrastructure, populations, and economies to systemic risk.

Together, these megatrends are not isolated challenges, but reinforcing forces that require defence, security, and resilience systems to operate in a more integrated, anticipatory, and adaptive way than ever before.

## 2.1

### Technological disruption

Digitalisation is a defining pillar of national transformation across the Middle East, enabling smarter government, more connected infrastructure, and digitally delivered public services. As these capabilities scale, cyber and information domains have become central to national preparedness, increasingly embedded within broader defence, security, and resilience agendas.

Defence institutions are increasingly embedding digital capabilities into modernisation efforts, strengthening secure systems, data integration and cyber resilience to support operational readiness and protect critical assets. Advanced analytics, digital forensics, and integrated command platforms are now routinely deployed to support public safety and internal security. AI-enabled analytics and smart policing platforms, for example, can improve response times and operational efficiency in complex urban environments, while maintaining strong governance and oversight.<sup>3</sup>

From a resilience perspective, digitalisation strengthens the continuity of essential services by enabling real-time monitoring and coordinated crisis management. Integrating cyber resilience into national critical infrastructure strengthens digital government and smart infrastructure, enabling continuity of essential services as digital capabilities expand.



## 2.2

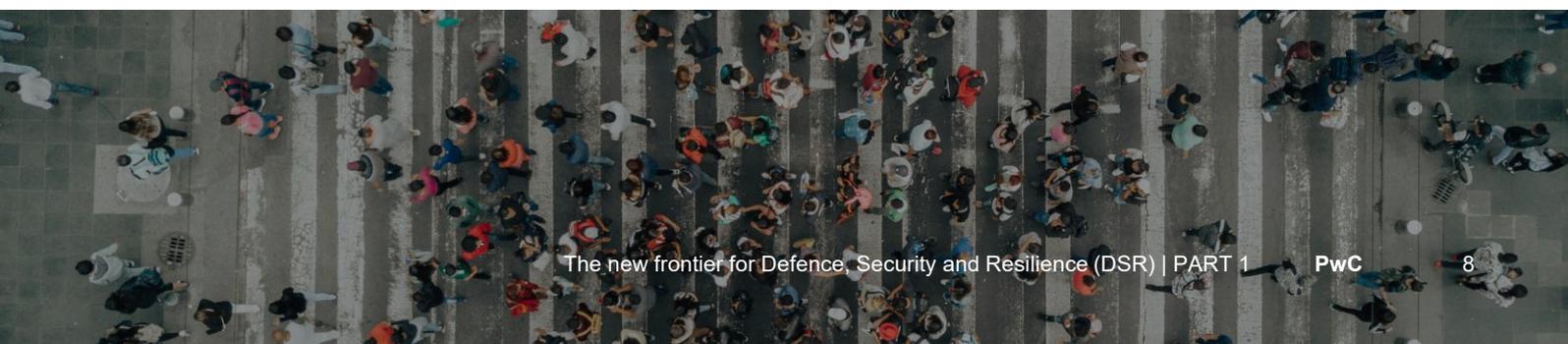
### Demographic shifts

Urbanisation and demographic shifts are central features of the Middle East's long-term development trajectory<sup>4</sup>. Sustained population growth, a youthful demographic profile, and international workforce mobility are reinforcing the role of cities as engines of economic activity, innovation, and service delivery.<sup>5</sup> Governments across the region are proactively shaping this transition through master planning, investment in smart infrastructure, and integrated urban governance.

From a defence perspective, the growing concentration of population, infrastructure and strategic assets in urban areas is elevating the importance of readiness for operations in complex, high-density settings. In response, armed forces are increasingly integrating urban environments into training, logistics and civil-support planning, strengthening coordination with civilian authorities during major events and crisis scenarios.<sup>6</sup> This enhances national preparedness while enabling safe, resilient and well-governed urban growth.

For security institutions, urbanisation and demographic diversity reinforce the need for advanced public safety models that operate at scale. Technology-enabled policing, integrated command centres, and data-driven deployment are enhancing situational awareness and response capabilities across major cities. Adoption of smart-city security platforms also improve efficiency, coordination, and service quality while maintaining strong governance and public trust.

From a resilience perspective, growing cities require infrastructure and service systems designed for continuity, adaptability, and rapid recovery. Investments in smart grids, integrated transport networks, resilient utilities, and joint public-private operating models are strengthening the robustness of urban lifeline services. Whole-of-city resilience frameworks enable governments to anticipate shocks, manage peak demand, and sustain essential services under a wide range of conditions.



## 2.3

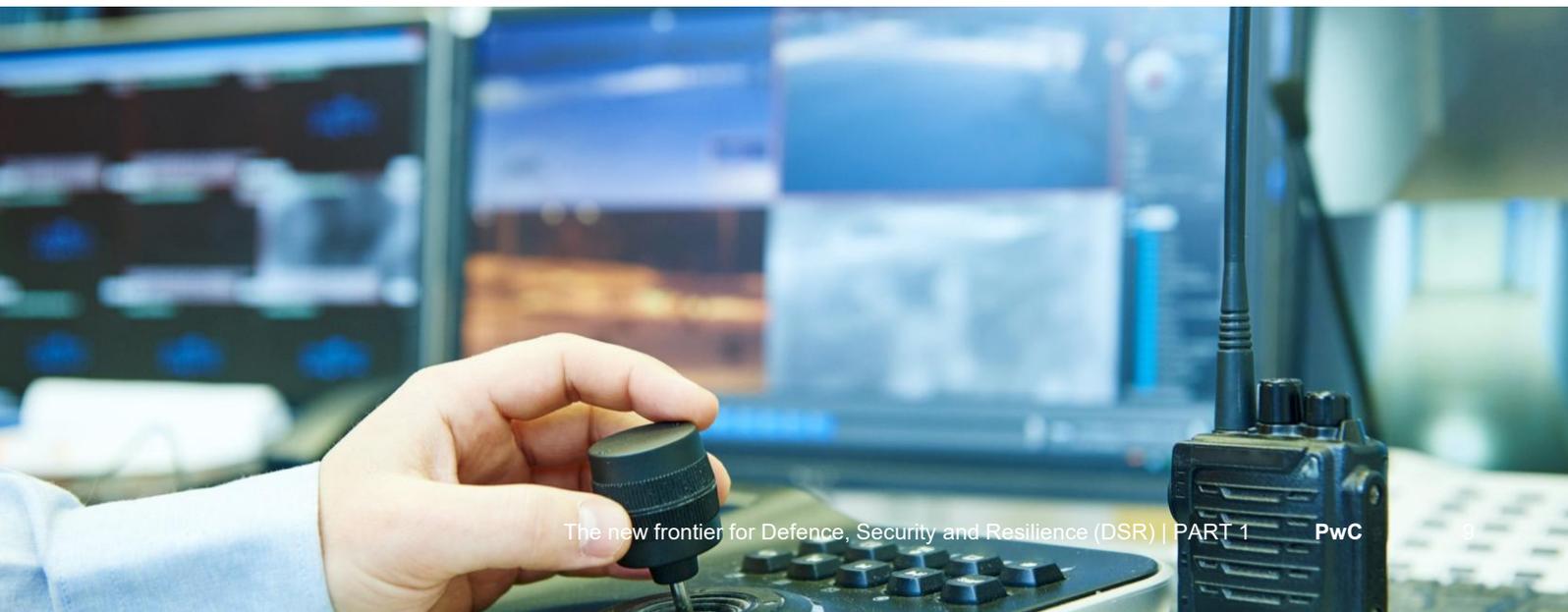
### A fracturing world

Localisation is a strategic priority across the Middle East, supporting national capability, economic diversification and long-term resilience. Governments are actively strengthening domestic capacity in defence, security technologies and essential systems, while positioning national champions to participate in global markets.

Localisation plays an increasingly important role in defence transformation across the region, supporting industrial resilience. Localisation agendas are accelerating domestic manufacturing, maintenance, and systems-integration capabilities across land, air, and maritime domains. By building domestic capacity and encouraging greater integration across defence ecosystems, localisation is helping enhance current readiness while contributing to long-term economic and global competitiveness.

For security, localisation supports sovereign control of critical technologies such as secure communications, identity platforms, and surveillance systems. Nationally governed digital identity and trusted data platforms support policing, border management, and justice services, ensuring operational continuity and data stewardship are aligned with key government priorities.

From a resilience standpoint, localisation strengthens preparedness for global disruptions by ensuring access to critical inputs and services. Regional initiatives to localise pharmaceutical production, food security, and energy technologies illustrate how governments are integrating industrial policy with national resilience planning, reinforcing continuity of essential services under all conditions.



## 2.4

### Social instability

Social instability is an increasingly important consideration for national preparedness globally, shaped by rapid economic change, heightened connectivity, and evolving regional and international dynamics. In the Middle East, governments have prioritised stability as a cornerstone of development, while continuing to anticipate emerging social risks. Globally, prolonged conflicts, economic volatility often shape social conditions across borders, influencing mobility patterns, public sentiment, and risk perceptions. Governments across the region have, therefore, embedded these considerations within long-term national preparedness and development strategies.

From a defence perspective, the potential for social instability reinforces the importance of readiness and the ability to support civil authorities when required. By modernising their capabilities, armed forces can enhance situational awareness and strengthen interoperability, ensuring they can contribute to national security objectives across a wide range of contingencies. These capabilities provide assurance and continuity during periods of heightened complexity.

For security institutions, rising social pressures reinforce the need for preventive, intelligence-informed, and coordinated public safety approaches. Digitally connected and highly diverse populations benefit from modern security models that integrate advanced analytics, real-time command platforms, and strong governance frameworks. When governments invest significantly in smart security systems, it enhances visibility, coordination, and responsiveness while supporting social cohesion and public confidence.

From a resilience perspective, managing social instability is closely linked to maintaining the continuity of essential services and effective crisis communication. National resilience frameworks increasingly integrate social indicators, early-warning mechanisms, and whole-of-government coordination to ensure services remain reliable and trusted under all conditions.<sup>7</sup> This approach strengthens institutional credibility and reinforces long-term stability.

## 2.5

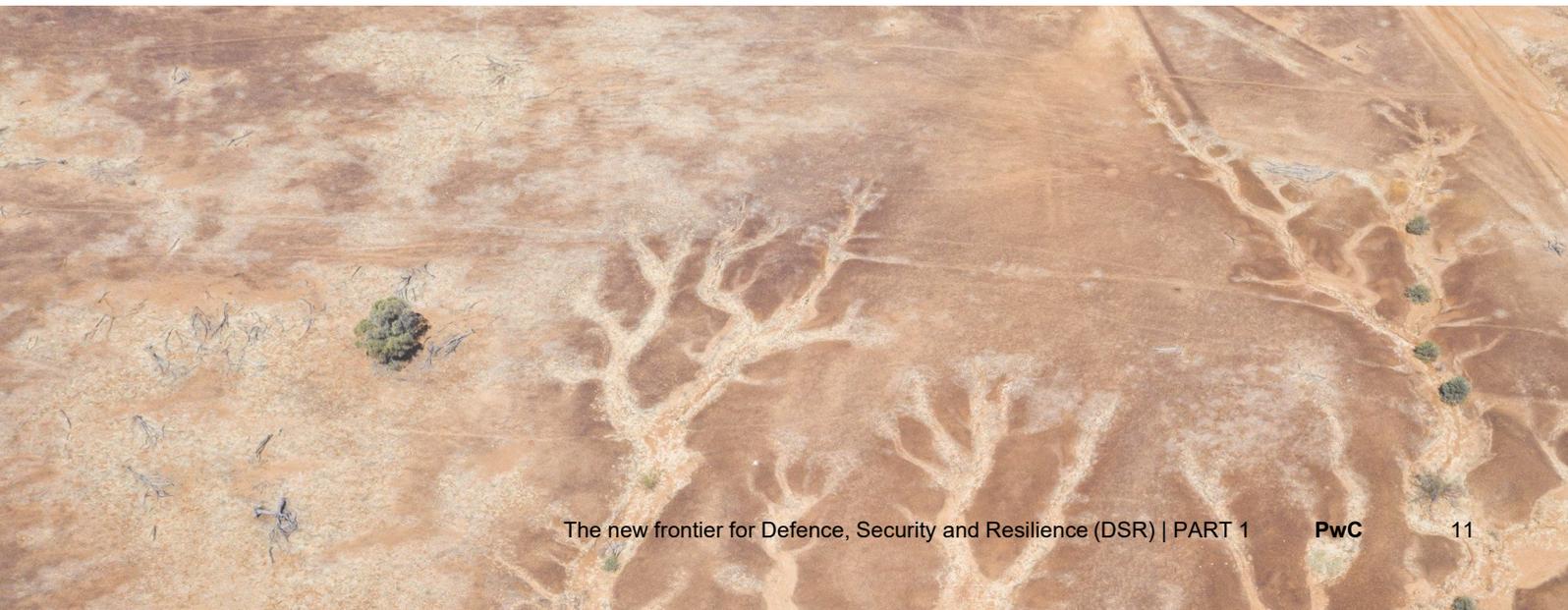
### Climate change

Climate adaptation is a strategic priority across the Middle East, reflecting proactive leadership in managing environmental conditions while sustaining economic growth and population wellbeing. Rising temperatures, water scarcity, and environmental stressors are being addressed through long-term planning, advanced infrastructure investment, and regional collaboration, positioning climate resilience as a core element of national preparedness.

From a defence standpoint, climate considerations are increasingly integrated into capability development, infrastructure planning, and operational readiness. Armed forces are enhancing their ability to operate effectively in demanding environmental conditions, while also supporting national authorities in humanitarian assistance, disaster response, and civil support roles when required. For security institutions, climate adaptation and population mobility reinforce the importance of coordinated planning across border management, civil protection, and emergency services. Advanced early-warning systems and inter-agency coordination enable timely and proportionate responses, helping governments protect communities and maintain public safety during environmental or seasonal events.

Resilience is central to managing the interaction between climate conditions, mobility, and essential services. Significant investments in water security, energy diversification, climate-resilient infrastructure, and smart resource management are enhancing the robustness of national systems.<sup>8</sup> At the same time, resilience frameworks increasingly account for workforce mobility and demand variability, ensuring continuity across health, transport, food, and digital services.

These forces do not act in isolation. They shape Defence, Security, and Resilience simultaneously - often amplifying one another.



## Section 3

### Looking ahead: from foundations to excellence

The region's transformation has created a new policy and operational imperative: to translate national ambition into enduring capability. Defence, security, and resilience form the backbone of this effort, providing governments with a single system of preparedness that links institutions, technology and national policy.

As the Middle East continues to urbanise, diversify, and expand its global influence, preparedness will be measured not by military strength alone, but by the agility of institutions, the maturity of partnerships, and the continuity of essential services.

Excellence in defence, security and resilience will depend on integrated operating models, shared intelligence, sovereign capability in strategic domains, and whole-of-government coordination with private operators responsible for national lifelines.

**We leave one guiding question  
for leaders and practitioners:**



How can the Middle East's strength in defence, security, and resilience evolve into a sustained model of global excellence and influence?



# Contact us

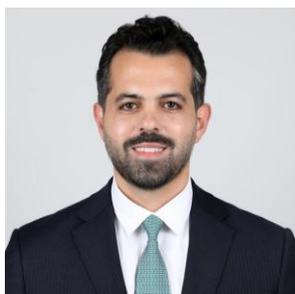


**Sami Salem**

DSR Partner  
PwC Middle East

[sami.salem@pwc.com](mailto:sami.salem@pwc.com)

---



**Ismail Dalli**

DSR Partner  
PwC Middle East

[ismail.dalli@pwc.com](mailto:ismail.dalli@pwc.com)

---



**Yasmeen AbuTaleb**

DSR Manager  
PwC Middle East

[yasmeen.abutaleb@pwc.com](mailto:yasmeen.abutaleb@pwc.com)

# References

1. SIPRI (2024). "Military Expenditure Database." Stockholm: Stockholm International Peace Research Institute.
2. PwC Megatrends (2025).  
<https://www.pwc.com/gx/en/issues/megatrends.html>
3. US Department of Justice (2024). "Artificial Intelligence and Criminal Justice"
4. UN Department of Economic and Social Affairs (2025). World Population Prospects
5. UNICEF MENA Generation 2030
6. Army Techniques Publication (ATP) 3-06.11 – Brigade Combat Team Urban Operations (September 2024)
7. UNDRR. Urbanization trends and urban resilience in the Arab region
8. World Bank (2024). Middle East and North Africa Climate and Development Report.



This publication has been prepared for general guidance on matters of interest only and does not constitute professional advice. You should not act upon the information contained in this publication without obtaining specific professional advice. No representation or warranty (express or implied) is given as to the accuracy or completeness of the information contained in this publication, and, to the extent permitted by law, PricewaterhouseCoopers Middle East, its members, employees and agents do not accept or assume any liability, responsibility or duty of care for any consequences of you or anyone else acting, or refraining to act, in reliance on the information contained in this publication or for any decision based on it.

© 2026 PwC. All rights reserved. PwC refers to the PwC network and/or one or more of its member firms, each of which is a separate legal entity. Please see <https://www.pwc.com/structure> for further details.