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UNITED KINGDOM (UK)

Cyber Security Market

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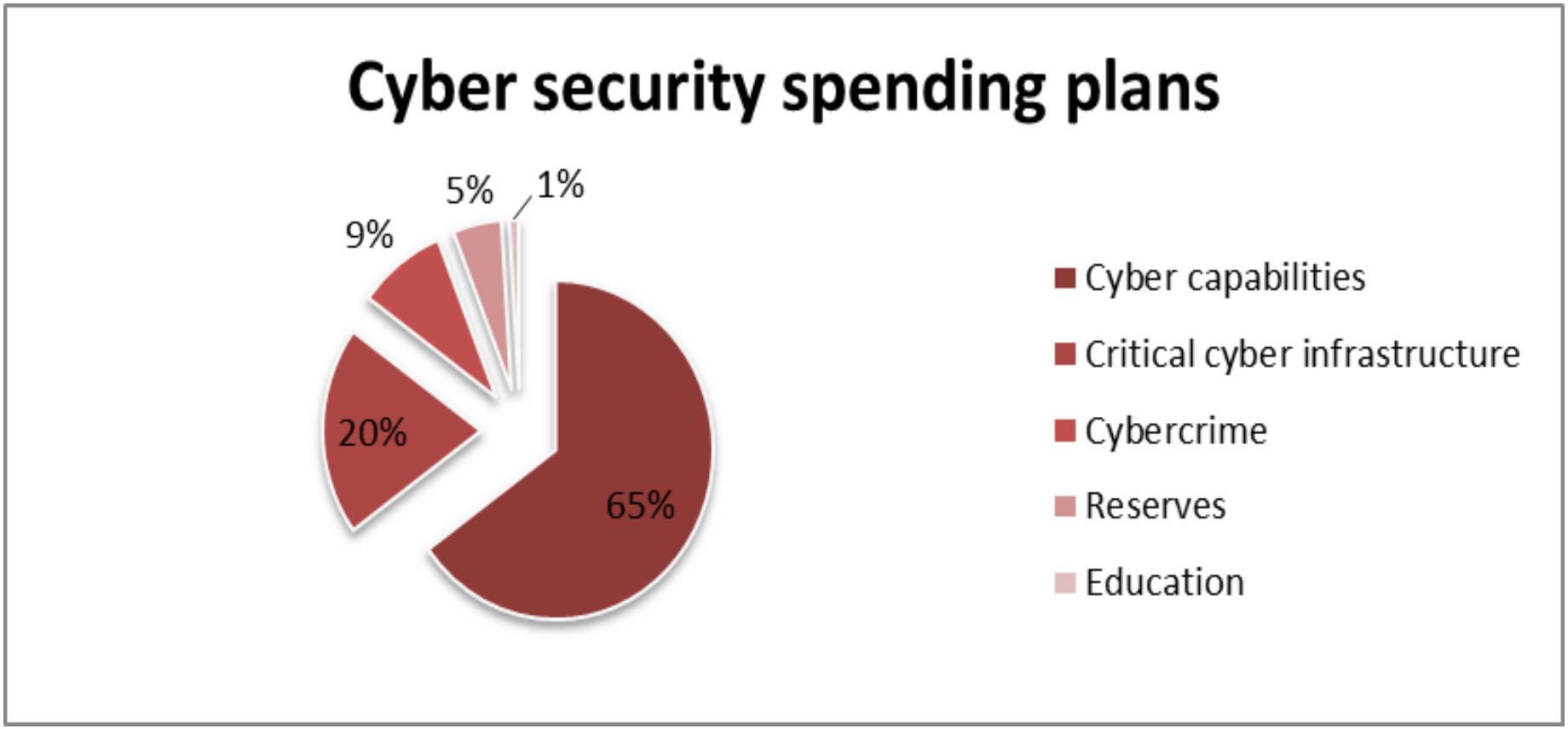
WHY UK

- Government classified cyber security as ‘Tier 1’ national security risk
- National Cyber Security Program, initial outlay of $1 billion
- Highly networked nation, $75 billion online transactions/yr
- 87% of small firms, 93% large firms risked in 2012
- Demand from government and private sector

ALLOCATION OF CYBER SECURITY EXPENDITURES

SOURCE: ZDNET, 2013. DEVELOPED FROM ESTIMATES PROVIDED BY VARIOUS UK GOVERNMENT REPORTS AND PUBLISHED ARTICLES



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MARKET ACCESS

- Close political, defense ally of USA
- Open access for US exporters to UK defense contracts
- UK-US Defense Trade Cooperation, licenses for defense equipment and services eliminated for sales to government
- Common language, cultural similarities

UK CYBER SECURITY MARKET AT A GLANCE

Strengths	Weaknesses
• Strong political and defense relationship with the US • Open and transparent market access • Member of WTO's Government Procurement Agreement	• Political issues with the EU • Coalition government • Expensive market to do business • Compliance with UK laws and EU Directives
Opportunities	**Threats**
• Increased spending on cyber security • Access to the European Union market • Private sector opportunities	• Significant competition from other domestic and foreign companies • Defense spending cuts

MARKET OPPORTUNITIES

- Niche market
- Opportunities → cloud computing, business analytics, anti-virus, content management, cyber security software and services
- Demand for 'innovative' cyber security solutions from experienced suppliers

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DOING BUSINESS WITH GOVERNMENT

- Defence Equipment and Support (DE&S) agency of Ministry of Defence tasked with procurement of equipment and services for defense
- Significant competition for government contracts
- Exporters should abide by EU directives also