

Global Cyber Security Market 2013-2023

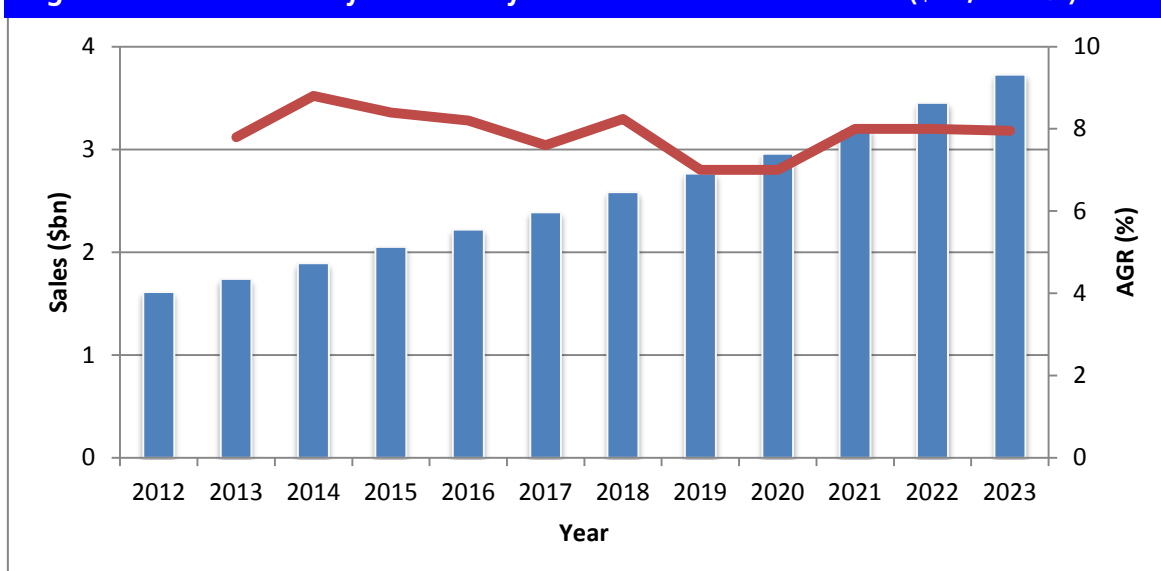
4.12 Australian Cyber Security Market 2013-2023

Table 4.27 Australian Cyber Security Market Forecast 2013-2023 (\$bn, AGR %, CAGR%, Cumulative)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2013-23
Sales \$bn	1.61	1.74	1.89	2.05	2.22	2.39	2.59	2.77	2.96	3.20	3.45	3.73	28.98
AGR (%)		7.8	8.8	8.4	8.2	7.6	8.2	7.0	7.0	8.0	8.0	8.0	
CAGR (%) 2013-18				8.2			2018-23			7.6			
CAGR (%) 2013-23							7.9						

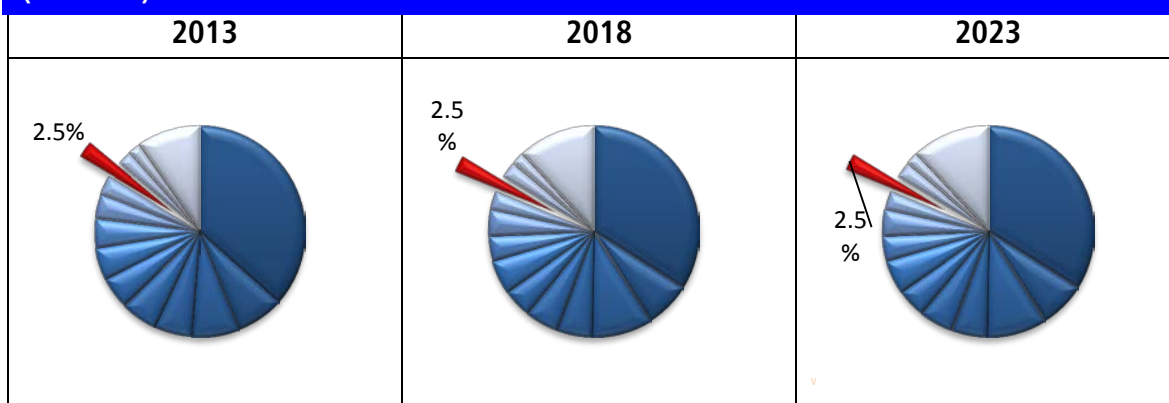
Source: *Visiongain 2013*

Figure 4.27 Australian Cyber Security Market Forecast 2013-2023 (\$bn, AGR%)



Source: *Visiongain 2013*

Figure 4.28 Australian Cyber Security Market Share Forecast 2013, 2018 and 2023 (% Share)



Source: *Visiongain 2013*

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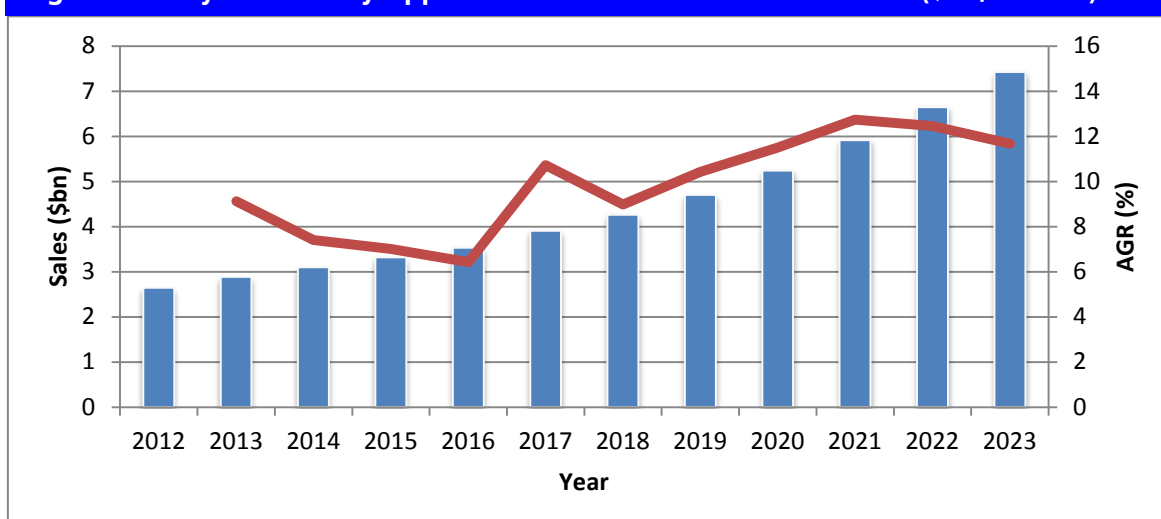
6.7 The Cyber Security Application Security (AppSec) Submarket 2013-2023

Table 6.12 Cyber Security AppSec Submarket Forecast 2013-2023 (\$bn, AGR %, CAGR %, Cumulative)

	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2013-23
Sales \$bn	2.64	2.88	3.10	3.31	3.53	3.91	4.26	4.70	5.24	5.91	6.65	7.42	50.90
AGR (%)		9.1	7.4	7.0	6.4	10.7	9.0	10.4	11.5	12.7	12.5	11.7	
CAGR (%) 2013-18	8.1						2018-23	11.8					
CAGR (%) 2013-23	9.9												

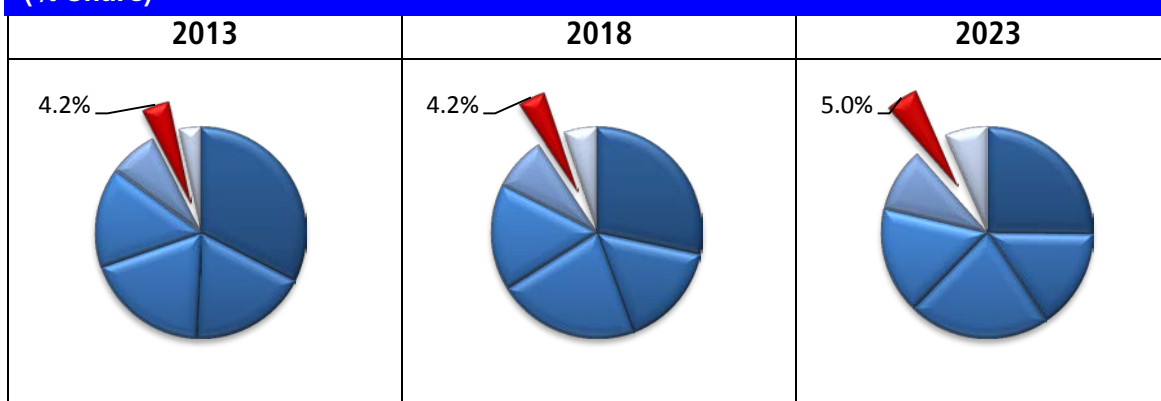
Source: *Visiongain 2013*

Figure 6.16 Cyber Security AppSec Submarket Forecast 2013-2023 (\$bn, AGR %)



Source: *Visiongain 2013*

Figure 6.17 Cyber Security AppSec Submarket Share Forecast 2013, 2018 and 2023 (% Share)



Source: *Visiongain 2013*

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8. Expert Opinion

8.1 IBM Corporation: Martin Borrett

IBM is a global technology provider, headquartered in New York, US. IBM manufactures and markets computer hardware and software. They also offer infrastructure, hosting and consulting services in areas as diverse as nanotechnology and mainframe computers.

For this interview, Visiongain interviewed **Kathleen Tyler**, Head of UK External Relations, and **Martin Borrett**, Director of the IBM Institute for Advanced Security, in November 2012; we thank them for their involvement.

8.1.1 The IBM Institute for Advanced Security

Visiongain: Please could you outline the background of the IBM Institute for Advanced Security, and your personal role?

Martin Borrett: I'm the Director of the Institute here in Europe, which is one of three branches that the Institute has internationally. The Institute is a global organisation that encompasses all of IBM's business units; in fact, it takes a holistic approach to security that encompasses everything that IBM does across our security capabilities. One of the main aims that the Institute has been to bring all of these security capabilities together in a much more holistic and meaningful way and to route that through a number of different channels. For instance, on our website, you can find a number of opinion pieces, articles, and research papers discussing some of the very topical issues that our clients in the industry are facing around the issues of cyber, cloud and mobile security.

The Institute also brings together the best of what we derive from our IBM research and security operation centres around the world in order to better serve our current and future clients. The security operation centres generate huge numbers of security-related alerts, around 13bn per day; we try to take the insight from that and to utilise it to shape the strategies and approaches employed by IBM for sectors such as cyber. Here in Europe, for example, I've spoken at a number of international conferences and other such events on the subject of cyber security; particularly on factors that organisations should consider when they try to combat those threats.

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9.1 BAE Systems

Table 9.2 BAE Systems Overview 2011 (Total Revenue, Revenue from Market, % Revenue From Market, Global Market Share %, HQ, Ticker, Contact, Website)

	2011
Total company revenue \$bn	\$30.73bn
Revenue from this market \$bn	\$2.24bn (Including associated services)
% of revenue from this market	7.3% (Including associated services)
Global market share %	3.9% (Approx.)
Headquarters	London, UK
Ticker	LSE: BA
IR Contact	Andrew Wrathall
Website	http://www.baesystems.com/home

Source: *Visiongain 2013*

Table 9.3 BAE Systems Contracts / Projects / Programmes 2012 (Date, Subcontractors, Country, Value, Expires, Details)

Date	Subcontractors/ Partners	Location	Value \$m	End Date	Details
26/09/2012	N/A	US	27.4	N/A	BAE Systems has been awarded a multi-year \$27.4 million contract to provide programme management and technical support services to the Department of Homeland Security (DHS). Note that this contract covers full IT services, not solely cyber security services.
24/09/2012	N/A	US	17.5	N/A	BAE Systems was awarded a multi-year \$17.5 million Next Generation Knowledge Base Design and Systems Integration Services contract by the US Defense Intelligence Agency (DIA). BAE will provide systems integration to sustain the information technology resources necessary for the DIA to execute its mission.
20/09/2012	Detica NetReveal	US	N/A	N/A	Detica NetReveal, a business division of BAE Systems, has been selected by the