

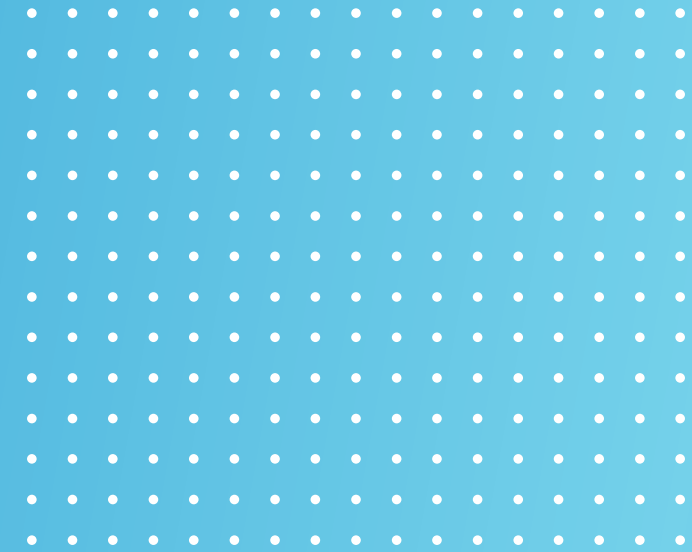
# Defend-as-one: Strengthening Resilience through Public and Private Sector Collaboration

21 September 2023



## Our purpose:

techUK champions technology's role in preparing and empowering the UK for what comes next, delivering a better future for people, society, the economy and the planet.



# Our members

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**940+**

Member companies  
countrywide

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**540**

Of our members  
are SMEs

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**900K+**

Employees  
represented across  
our network

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**47%**

Of our members  
have international  
offices and  
operations

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**100%**

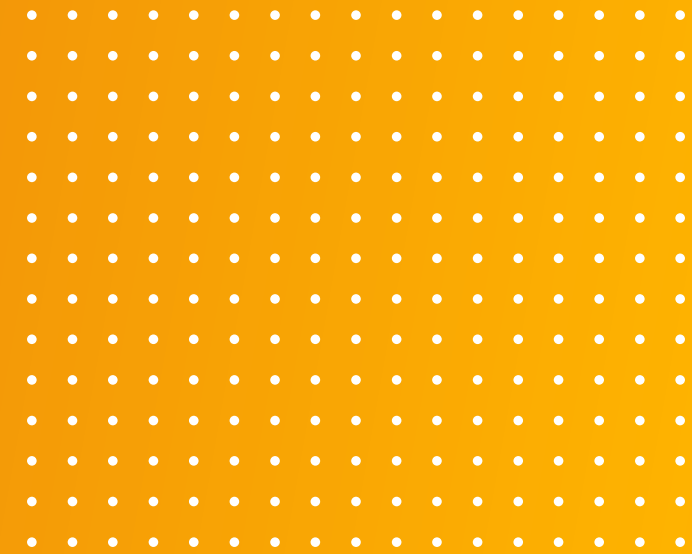
Of UK nations and  
regions represented  
by our membership






# Where does the threat come from?

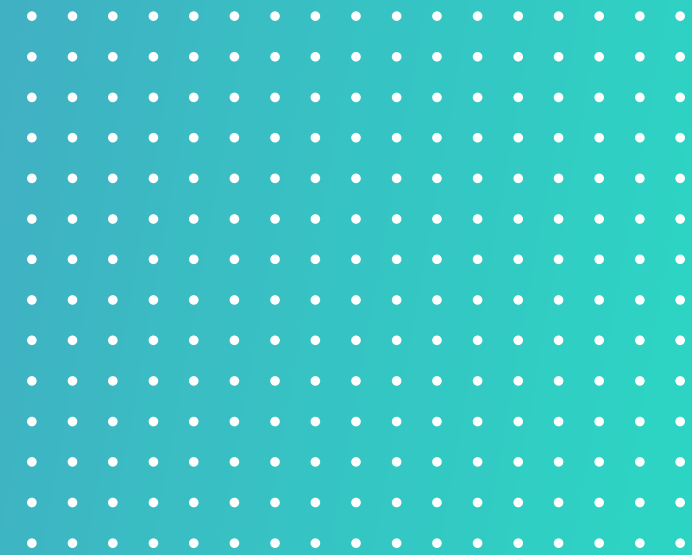
*Over the last 18 months, the National Cyber Security Centre has seen the rise of several Russian-aligned groups sympathetic to Putin's invasion of Ukraine. Now these are fringe state threats - the cyber equivalent of the Wagner group - and initially these groups focused their attacks on Ukraine and the surrounding region. But recently, they have begun to turn their attention to the UK and its allies. They are now seeking opportunities to compromise our Critical National Infrastructure.*

***Chancellor of the Duchy of Lancaster and  
Lead Government Minister for Cyber Security  
Oliver Dowden MP***



# State of the UK Cyber Sector

	<p><b>Number of companies</b></p> <ul style="list-style-type: none"><li>▪ We estimate that there are 1,979 firms currently active within the UK providing cyber security products and services</li></ul>
	<p><b>Sectoral Employment</b></p> <ul style="list-style-type: none"><li>▪ We estimate there are approximately 58,005 Full Time Equivalents (FTEs) working in a cyber security related role across the cyber security firms identified</li><li>▪ This reflects an estimated increase of c. 5,300 cyber security employee jobs within the last 12 months (an increase of 10%)</li></ul>
	<p><b>Sectoral Revenue</b></p> <ul style="list-style-type: none"><li>▪ We estimate that total annual revenue within the sector has reached £10.5 billion within the most recent financial year<sup>2</sup></li><li>▪ This reflects an increase of c. 3% since last year's study (which suggests slower growth from the previous year, during which the sector saw notably positive growth)</li></ul>





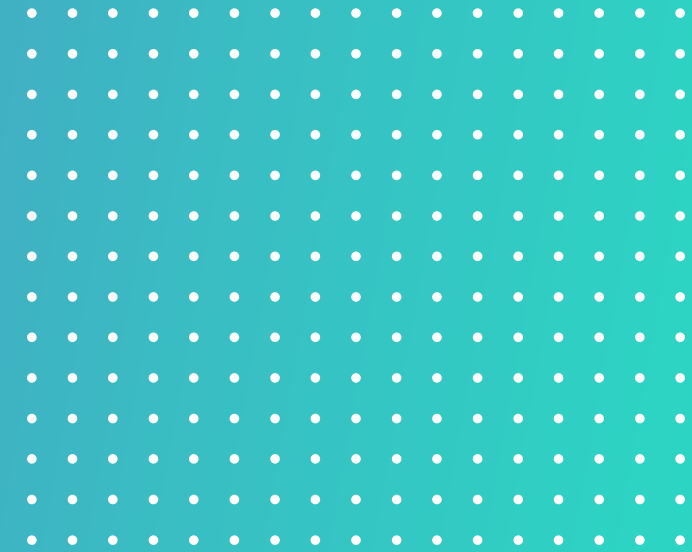
## Gross Value Added

- We estimate that total GVA for the sector has reached c. £6.2 billion
- This reflects an increase of 17% since last year's study, and suggests that despite a slower growth in revenues, sectoral productivity has grown significantly due to increased profitability
- We estimate that GVA per employee has increased from £101,000 to £107,400 within the last year (an increase of 6%), suggesting improved productivity is also reflected through profitability and staff remuneration



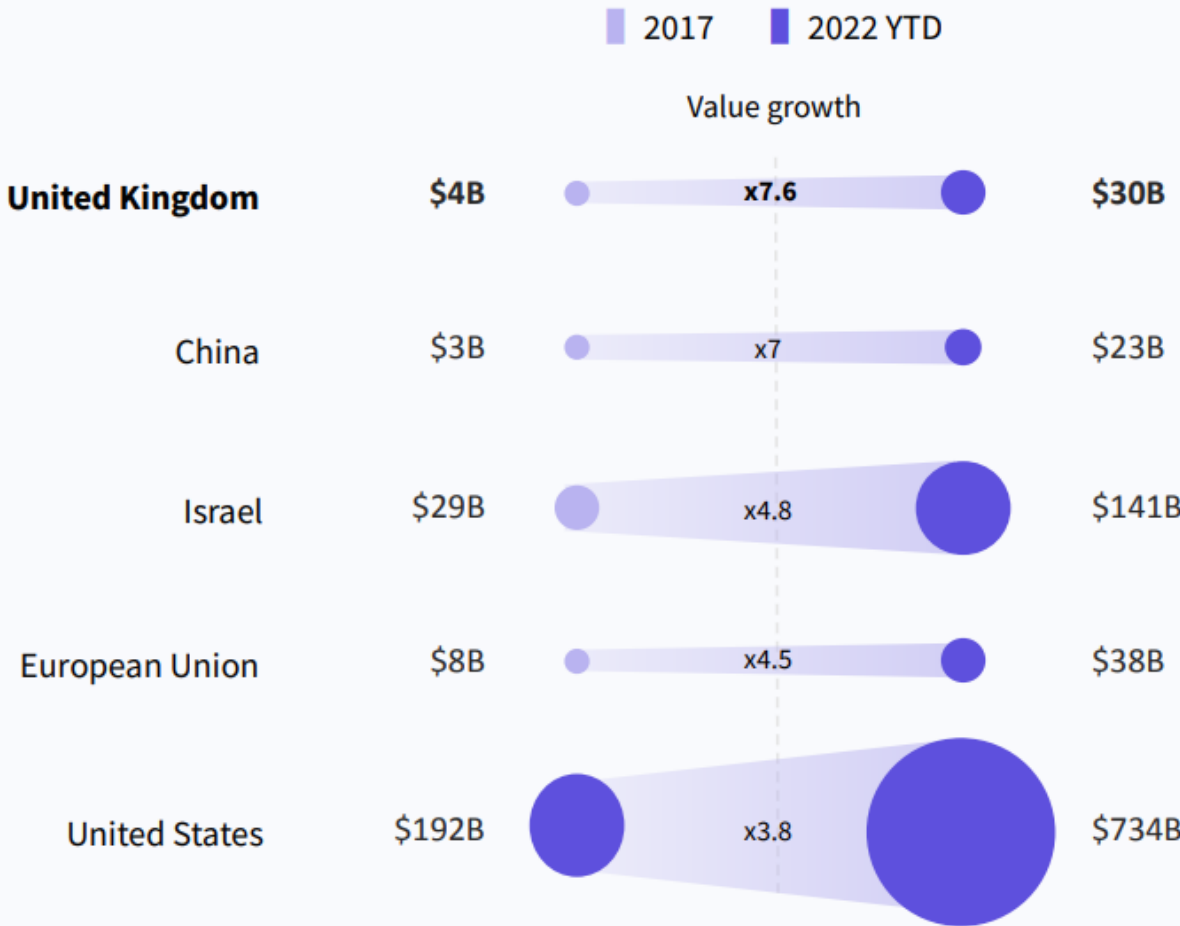
## Investment

- In 2022, £302 million has been raised across 76 deals in dedicated cyber security firms. Whilst this figure reflects a decrease in the value of investment raised compared with 2020 (£814 million) and 2021 (£1,013 million) levels, the number of deals in dedicated cyber security firms remains robust (76 deals in 2022 compared with 86 in 2021)



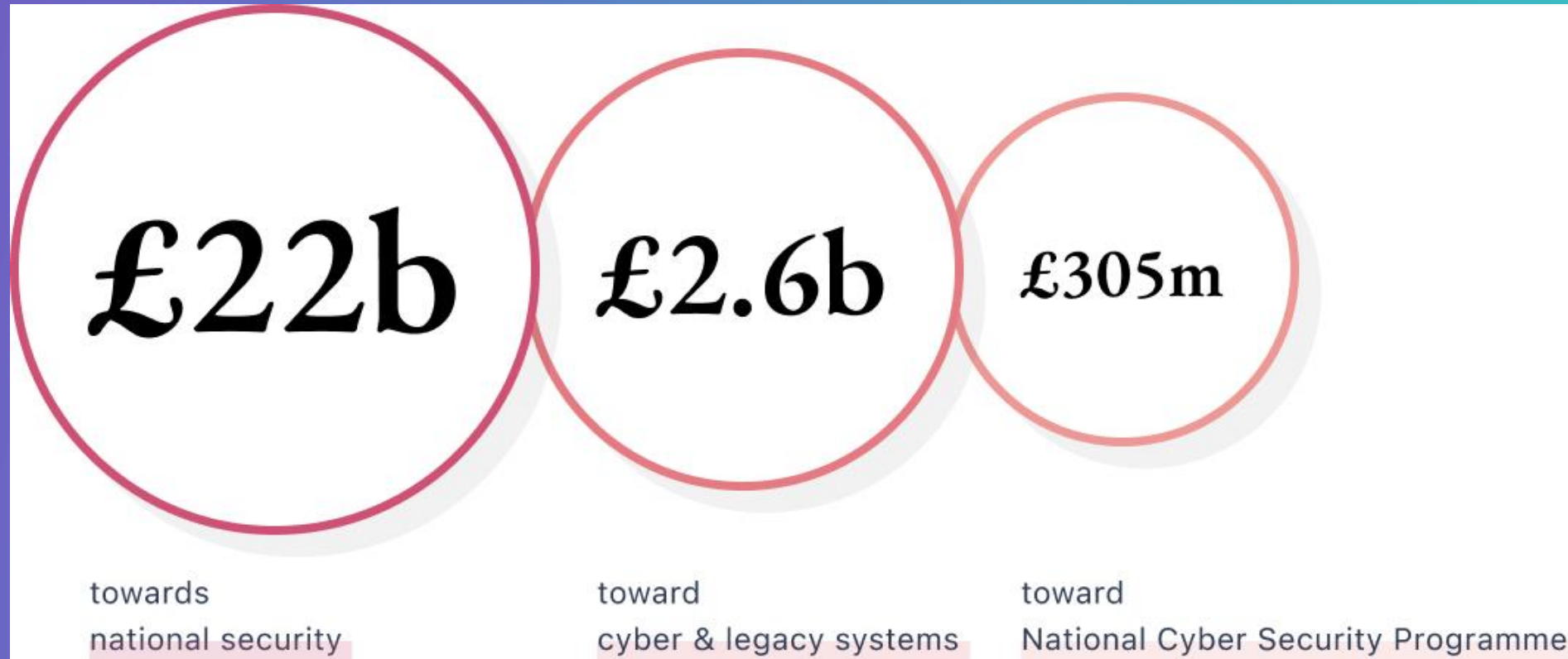
# The value of the UK Cyber security ecosystem has grown faster than the top global Cyber ecosystems.

Ecosystem Value growth of Cyber security startups



Overall Spend on:

techUK

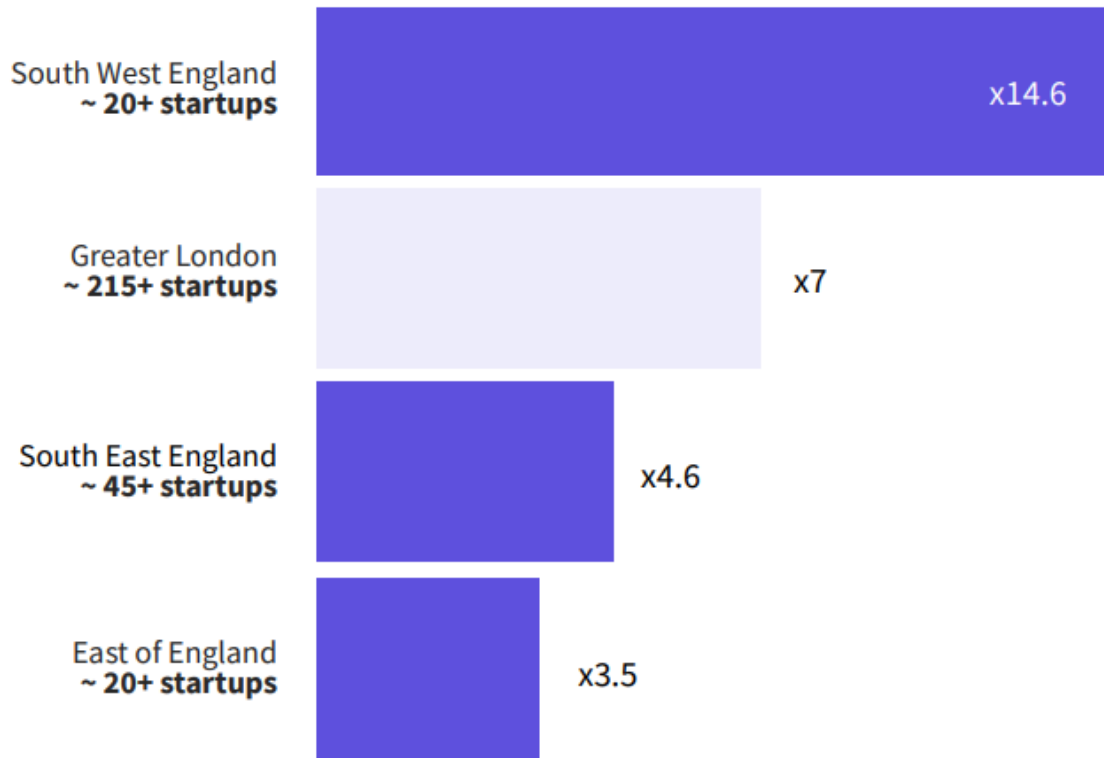


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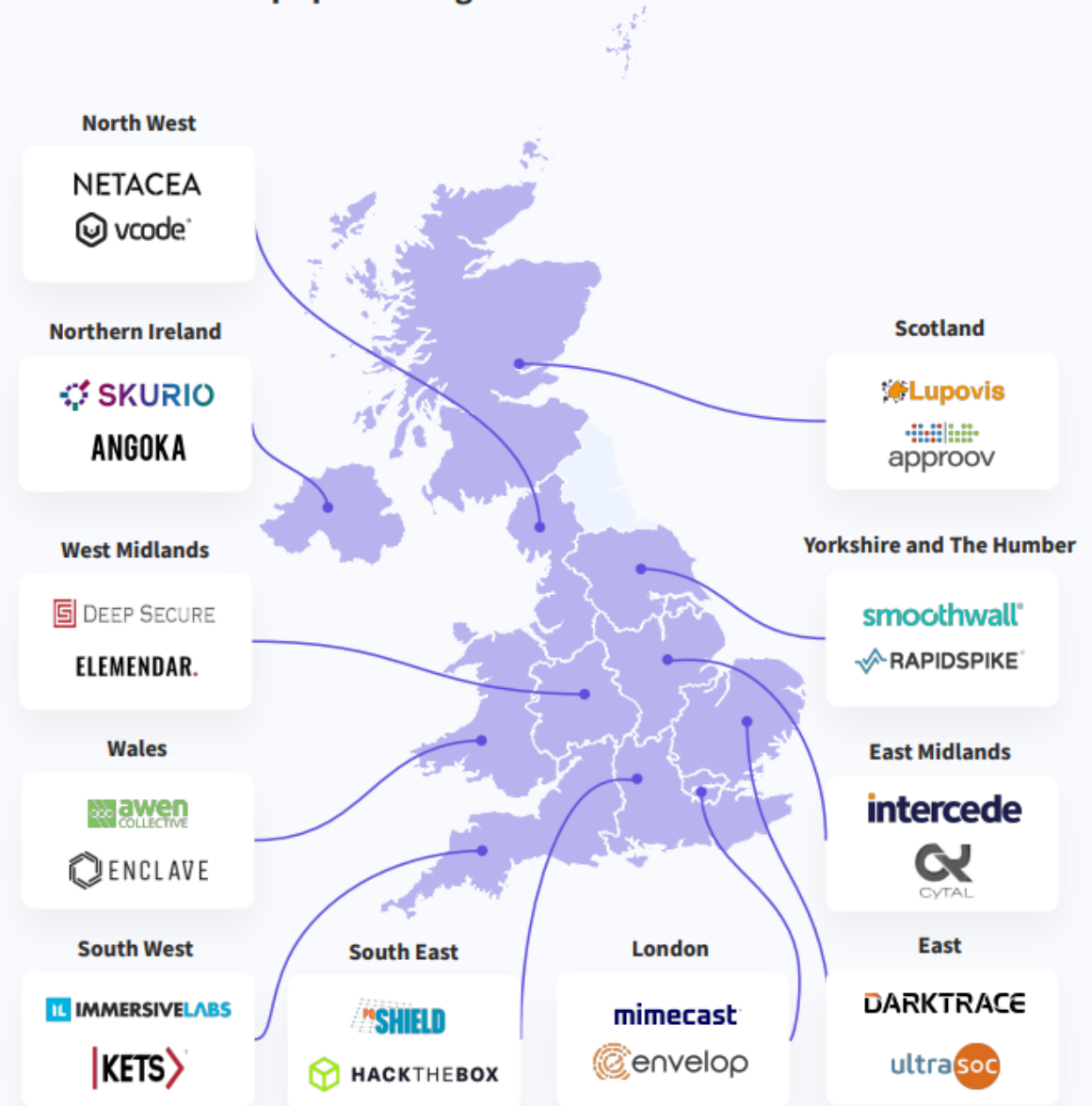


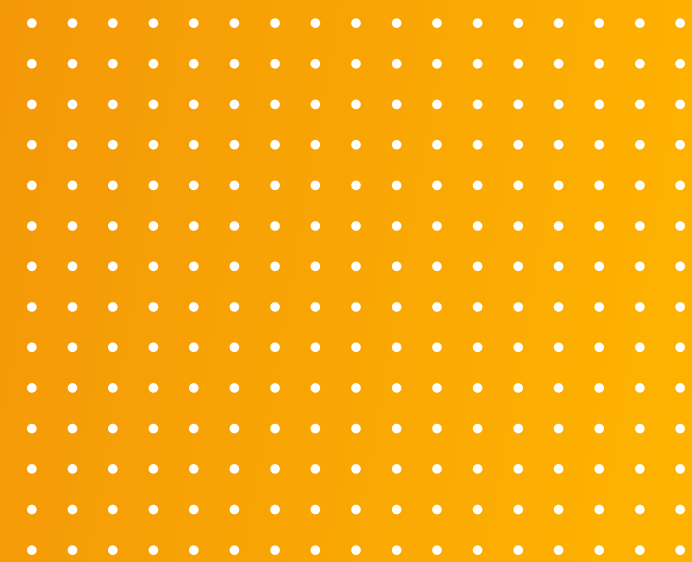
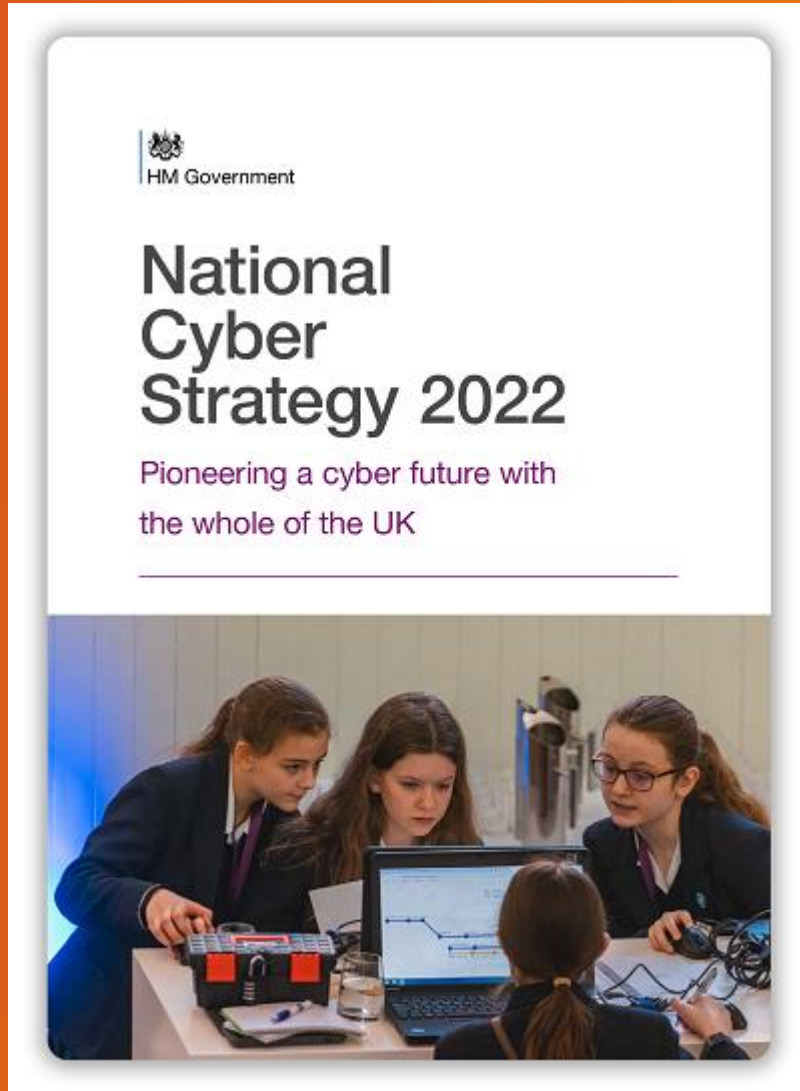
# UK regions outside of London host some of the most promising Cyber security startups.

Enterprise value growth of Cyber security startups since 2017  
EV growth of selected UK Regions



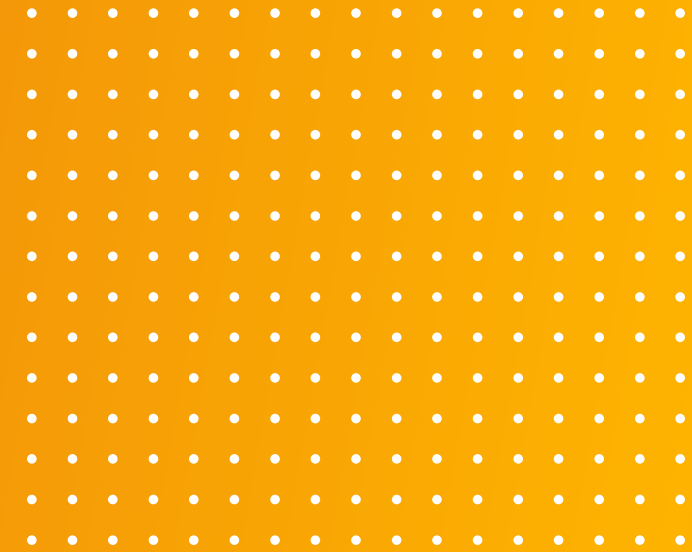
## Selected startups per UK Region



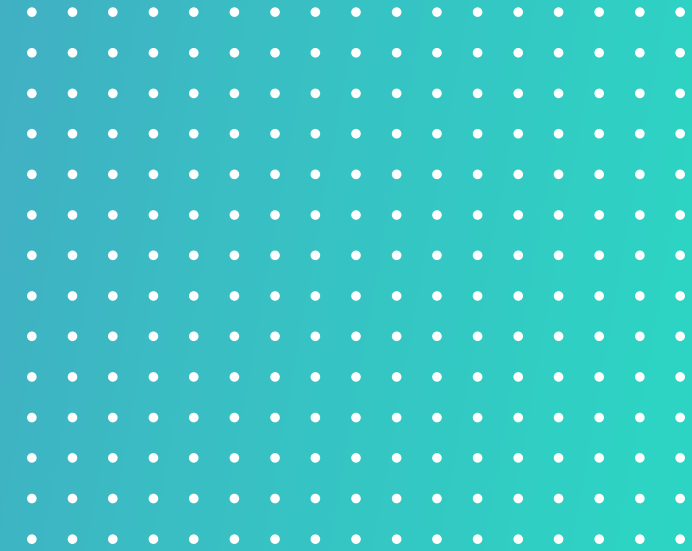


# Working Level

- PSTI Act
- Reforming the Computer Misuse Act
- Software Resilience
- App Security
- Developing the Cyber Profession
- IOT and Enterprise Security

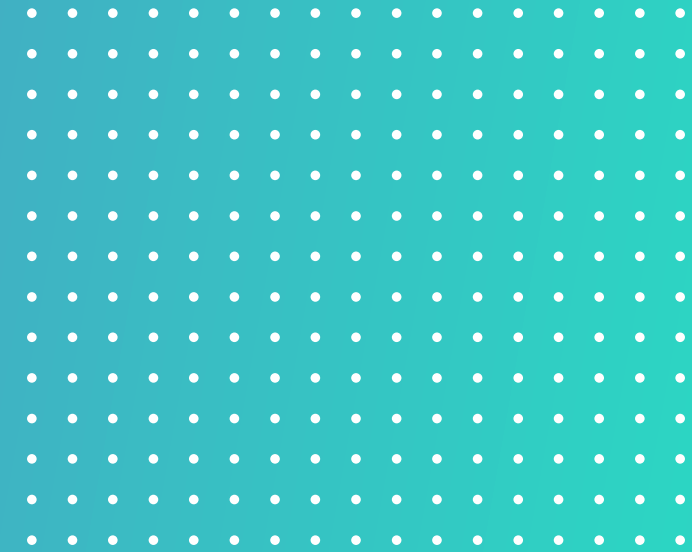


# National Cyber Advisory Board



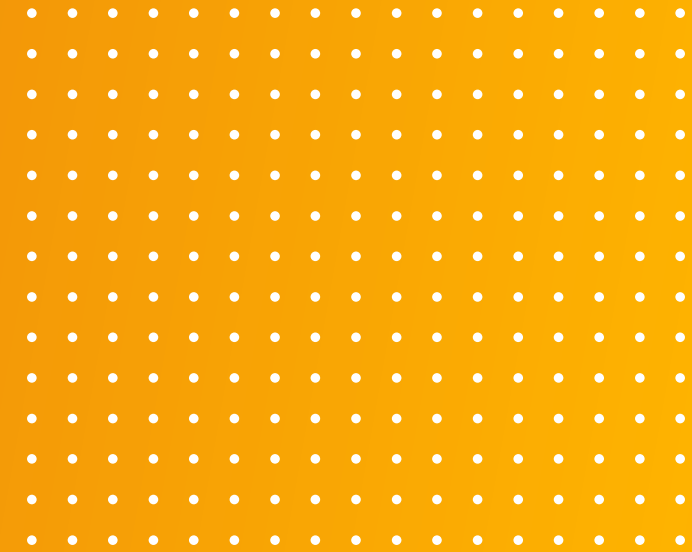
# Cyber Growth Partnership

- Public-Private Partnership – Conduit for supporting growth in the sector.
- Main Board and Operations Board
- Chaired by Digital Minister and techUK CEO
- Six WGs
  - Skills
  - Exports
  - Assurance
  - Strategy
  - Innovation and Investment
  - Regional Clusters



# National Cyber Security Centre

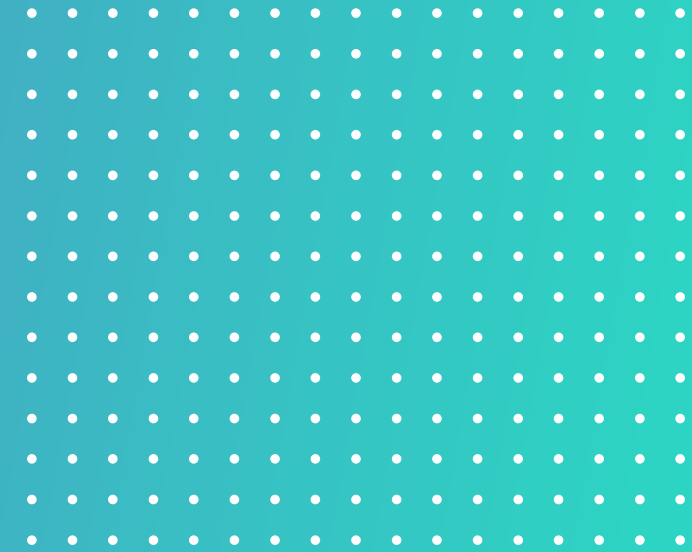
- Technical Authority - Part of GCHQ
- Not a regulator
- Incident Response/Support
  
- Guidance
  - [All topics - NCSC.GOV.UK](https://www.ncsc.gov.uk/all-topics)
  
- Cyber First
  - [CyberFirst overview - NCSC.GOV.UK](https://www.ncsc.gov.uk/cyberfirst-overview)
  
- Products and Services
  - [Products & services - NCSC.GOV.UK](https://www.ncsc.gov.uk/products-services)
  
- CISP
  - [About CISP - NCSC.GOV.UK](https://www.ncsc.gov.uk/about-cisp)



# UK Cyber Security Council



- Professional Body
- Chartered Status for Cyber Professionals
- 16 Specialisms
- Clearer Career Pathways



- The cyber sector workforce continues to lack diversity relative to the rest of the digital sectors, particularly when it comes to senior positions. Relatively few cyber firms have adapted their recruitment processes or carried out any specific activities to encourage applications from diverse groups.
  - 17 per cent of the workforce come from ethnic minority backgrounds, falling to just 3 per cent of those in senior cyber roles (i.e. those typically requiring 6 or more years of experience)
  - 16 per cent are female (vs. 28% across all digital sectors), falling to 3 per cent in senior roles
  - 10 per cent are neurodivergent, falling to 2 per cent in senior roles
  - 9 per cent are physically disabled, falling to 1 per cent in senior roles

