



UK SECURITY & RESILIENCE OUTLOOK

2022

A guide to the UK security
& resilience sector



UK SECURITY & RESILIENCE SECTOR

The UK's security and resilience sector is responding to a range of malicious and non-malicious threats, providing advanced physical and digital capabilities to keep the UK safe.



BUSINESS OPPORTUNITIES IN 2022

TRAJECTORY OF THE SECTOR

- ▀ Sector turnover is likely to keep growing and **exports will accelerate**, with opportunities and challenges ahead as international travel and trade shows resume post-pandemic.

CYBER SECURITY CONTINUES TO RISE

- ▀ The importance of cyber security continues to grow, as **online fraud and ransomware attacks become more frequent**, and with international instability further raising this threat.

THE POLICING DATA CHALLENGE

- ▀ Law enforcement will build a more coordinated approach to key capabilities through a new Chief Scientific Adviser, as they respond to **the challenges of digital forensics and exploit data and digital opportunities**.

FUTURE OF BORDER SECURITY

- ▀ Ongoing challenges at the UK border, including in the English Channel, and the tension between customer experience and security will lead to **greater digitisation and wider upstream collaboration with partners**.

RESURGENCE OF PHYSICAL AND TRANSPORT SECURITY

- ▀ As the UK economy opens post-pandemic **the protection of publicly accessible locations and the delivery of aviation, maritime and rail security will grow in importance** and offer new growth opportunities.



221%

increase in turnover in last
ten years (since 2011)

ADS by OE
own stats



UK Security & Resilience Outlook 2022

POLICY LANDSCAPE

NATIONAL RESILIENCE STRATEGY

- ▀ The forthcoming National Resilience Strategy sets out the Government's approach to **building national resilience in response to malicious and non-malicious threats**.
- ▀ It offers a unique opportunity for the UK security sector to contribute to both preparing and responding to future emergencies, whether they be pandemics or terrorist attacks, as part of a **new whole-of-society approach**.
- ▀ A **refresh to the 2018 Biological Security Strategy** is also expected. Work is underway to re-evaluate the risk landscape and rapid advances in biosecurity science and technology, providing opportunities for the UK's expert CBRN sub-sector.

NATIONAL CYBER STRATEGY

- ▀ In December 2021 the Government released its **National Cyber Strategy 2022**, setting out a comprehensive strategy for solidifying the UK's position as a global cyber power.
- ▀ Five pillars outline the progress made in the last five years, including **strengthening the UK cyber ecosystem**, taking the lead in critical technologies, and boosting the UK's capacity to deter, disrupt and deter in and through cyberspace.
- ▀ With over £2.6bn of committed funding in cyber and legacy IT, and the Government Cyber Security Strategy, there will be significant opportunities for the UK cyber security sector to continue to grow.

PROTECT DUTY

- ▀ Work continues with Government to develop the legislative proposals for the promised 'Protect Duty', which will set out **a legal duty on the operators of publicly accessible locations to enhance their protective security** and preparedness against the threat of terrorist attack.
- ▀ While it is not expected that the Protect Duty will be brought into force until 2023 at the earliest, this legislation will have a transformative effect on the protection of public spaces in the UK and therefore the associated protective security market.

EXPORTS OF TECHNOLOGY CAPABILITY

UK Defence and security data



53% CYBER SECURITY



7% FIRE EQUIPMENT



5% SURVEILLANCE



4% COMMUNICATION EQUIPMENT



2% MANAGED SERVICES



14% SCREENING & DETECTION



6% OTHER



5% DATA ANALYTICS & STORAGE



4% ACCESS CONTROL AND IDENTITY MANAGEMENT

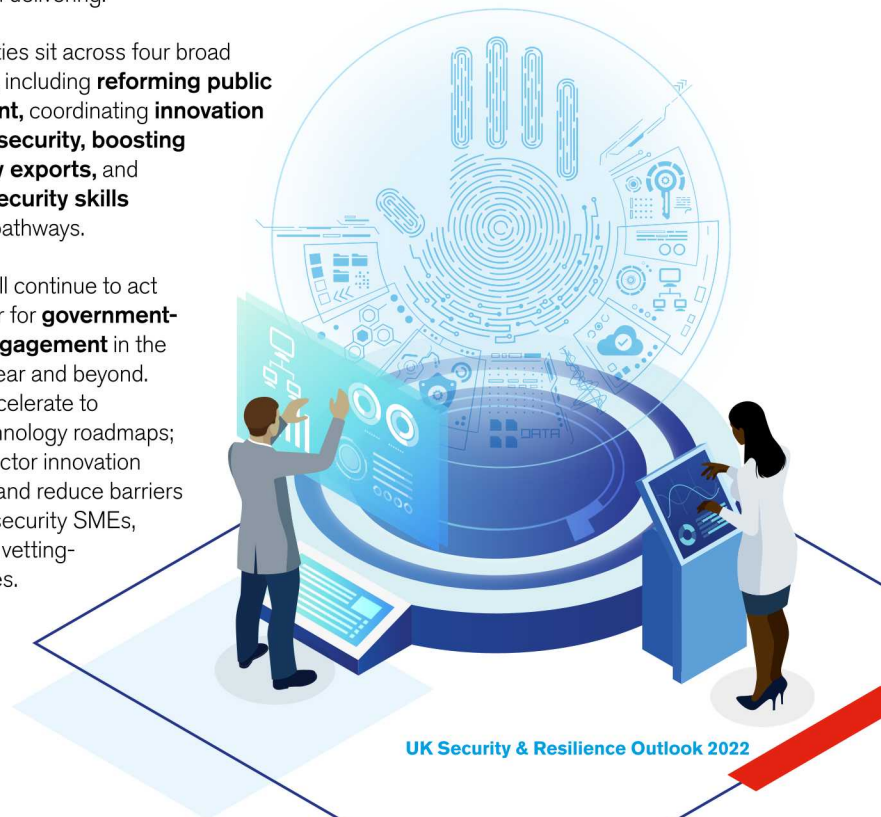
PROGRAMMES

SECURITY AND RESILIENCE GROWTH PARTNERSHIP (SRGP)

- ▀ **SRGP is co-chaired by RISC**, the wider security industry body, and the Government's Security Minister. It brings together **industry, academia and government** for the development, promotion, and delivery of UK security capabilities.
- ▀ Works to **break down barriers between government and the private sector** to ensure that the **UK's world-class security sector** meets national security and resilience requirements and underpins our prosperity.
- ▀ Cross-government projects in **partnership with industry and academia** in 2022 are currently focused on challenges relating to protective security, rail and maritime security, national exercising, and digitising the border.

THE DEFENCE AND SECURITY INDUSTRIAL STRATEGY (DSIS) 2021

- ▀ Set out several priorities for the UK security sector, which the SRGP is focused on delivering.
- ▀ These priorities sit across four broad policy areas, including **reforming public procurement**, coordinating **innovation in national security**, **boosting UK security exports**, and promoting **security skills** and career pathways.
- ▀ The DSIS will continue to act as a lodestar for **government-industry engagement** in the rest of the year and beyond. Work will accelerate to develop technology roadmaps; run cross-sector innovation challenges; and reduce barriers to entry for security SMEs, including on vetting-related issues.





ADS IS THE UK TRADE ORGANISATION REPRESENTING THE AEROSPACE, DEFENCE, SECURITY AND SPACE SECTORS.

ADS is focused on representing the interests of these valuable wealth producing industries in the UK and overseas to key stakeholders, government and the media. Farnborough International Limited, which runs the Farnborough International Airshow, is a wholly owned subsidiary.

ADS Security Outlook 2022 uses data estimates for 2021 data compiled by Oxford Economics in 2022 as well as ADS own sources.

ADS CONTACTS

Alex Hamilton
Director – Government Affairs,
Media & Comms (Interim)
T: +44 (0) 207 0911 127
Alex.Hamilton@adsgroup.org.uk

Nathan Mathiot
Senior Policy Advisor
Security & Resilience
T: +44 (0) 20 7091 1134
nathan.mathiot@adsgroup.org.uk

Twitter: [@ADSGroupUK](https://twitter.com/ADSGroupUK)
LinkedIn: [@ADSGroupltd](https://www.linkedin.com/company/adsgroupltd)