ADS

Securing
UK advantage

UK SECURITY & RESILIENCE OUTLOOK

2023

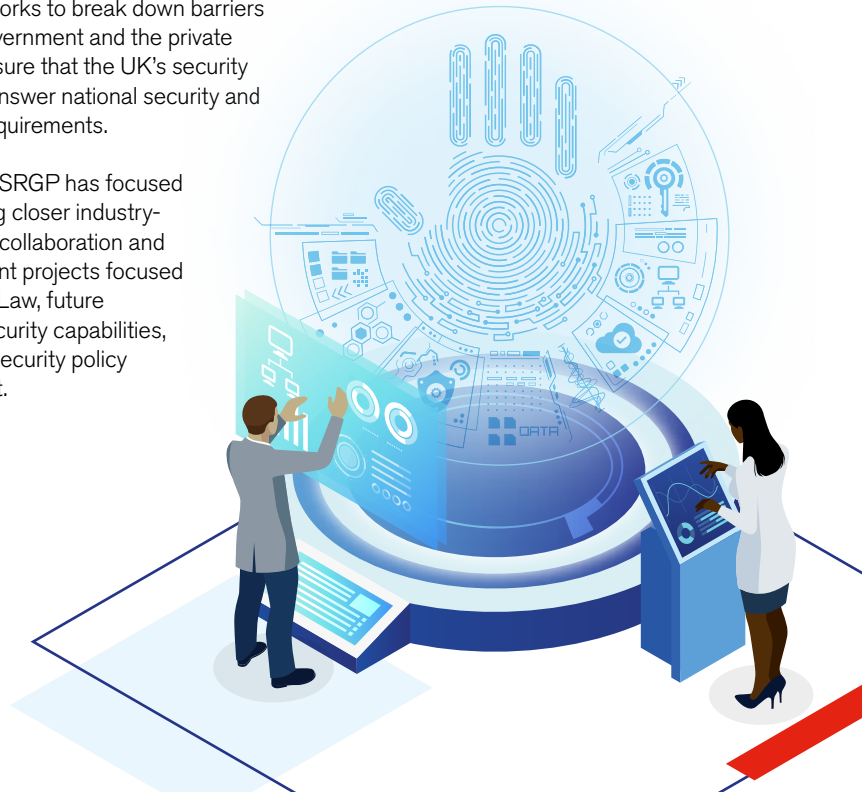A guide to the UK security & resilience sector

AN ACTIVE SECURITY AND RESILIENCE SECTOR

SECURITY & POLICING (S&P)

- Security & Policing (S&P), the official UK Government annual global security event takes place at Farnborough International Exhibition and Conference Centre in March each year.

- Hosted by the Home Office's Joint Security and Resilience Centre (JSaRC) and delivered with ADS as an industry partner, S&P remains a yearly showcase for our sector and offers a world-class opportunity for the community to meet and discuss the latest advances in national security and resilience.

- In 2023 the focus was on policing innovation, protecting our people and places, and advancing national security and resilience. S&P next takes place on 12-14 March 2024.

SECURITY AND RESILIENCE GROWTH PARTNERSHIP (SRGP)

- The SRGP is co-chaired by the UK Security and Resilience Industry Suppliers Community (RISC) and the Minister for Security. It brings together industry, academia and government for the development, promotion, and delivery of UK security capabilities.

- The forum works to break down barriers between government and the private sector to ensure that the UK's security sector can answer national security and resilience requirements.

- In 2023 the SRGP has focused on promoting closer industry-government collaboration and delivering joint projects focused on Martyn's Law, future transport security capabilities, and border security policy development.

UK SECURITY & RESILIENCE SECTOR

The UK's security and resilience sector is providing advanced physical and digital capabilities underpinning our prosperity and securing UK advantage against a range of malicious and non-malicious threats.

£9.5BN
EXPORTS

£12.8BN
VALUE ADDED

145K
DIRECT EMPLOYEES

5.8K
APPRENTICES

£23BN
TURNOVER

BUSINESS OPPORTUNITIES

CONTINUING NEED FOR TRANSPORT SECURITY

▪ Despite rising energy costs and disrupted supply chains, there will be an ongoing increase in travel in air, rail and sea, which will provide continuing transport security opportunities for the UK security and resilience sector.

ALL EYES ON BORDER SECURITY

▪ Ongoing focus on the small boats challenge in the English Channel and the war in Ukraine put a spotlight on the increasing importance of a secure border, which will provide opportunities for industry both in the UK and overseas.

SMALL ARMS PROLIFERATION

▪ Russian aggression against Ukraine has led to the dramatic increase in small arms flows to Ukraine and the consequent risk of proliferation via organised crime groups, which UK industrial capabilities can help to mitigate.

DOMINANCE OF CYBER SECURITY

▪ The UK cyber security market remains on a strong growth trajectory, in response to continuing threat and corporate and governmental investment in cyber resilience and increasing deployment of smart city technologies.

SALIENCE OF EMERGENCY MANAGEMENT

▪ A series of high-profile natural disasters in recent years has thrown a spotlight on the value of emergency management and there will be increasing investment in resilience, early warning systems, disaster response planning and recovery efforts.

203%

increase in turnover in last ten years (since 2012)

ADS by OE own stats

POLICY LANDSCAPE

MARTYN'S LAW

- Martyn's Law, named in honour of one of the victims of the Manchester Arena attack, is expected to be passed in 2023, placing a legal duty on operators of publicly accessible locations to enhance their protective security and preparedness against the threat of a terrorist attack.

- A long time in the development, Martyn's Law will revolutionise the protective security market in the UK especially for high-capacity locations, who will have to implement security plans similar to Fire and Health and Safety.

- It can also be expected that this may shape the regulatory approach to protective security in overseas markets and provide future export opportunities.

CONTEST 2023

- The Government published a refresh of the UK's counter terrorism strategy, CONTEST, in July 2023. This will continue to act as the guiding framework for the UK's counter-terrorism efforts and help to shape industry's ongoing engagement with the Home Office, law enforcement and intelligence agencies.

- The strategy retained the two-decade old Protect, Prepare, Prevent and Pursue framework, but rebalances the UK's focus towards other areas of threat beyond traditional terrorist threats. Industry will continue to work closely with government to deliver cutting-edge security technologies to keep the UK safe and will be looking out for details on efforts to upgrade the UK's border security, aviation security, and forensics capabilities.
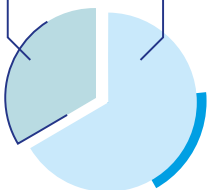
1990 COMPUTER MISUSE ACT

- The UK's Computer Misuse Act criminalises individuals who attempt to access or modify computer data without authorisation. However, as a law designed over three decades ago, it is now out of date and in need of reform to support the ongoing growth of the UK cyber security industry.

- A review by the Home Office this year will provide an opportunity for reforms to strengthen the UK's cyber resilience and accelerate the growth of the UK cyber security industry, through enabling legitimate vulnerability and cyber threat intelligence research.

EXPORTS OF TECHNOLOGY CAPABILITY

UK SECURITY EXPORT CAPABILITIES

Physical   **Digital**

- 61% CYBER SECURITY
- 7% FIRE EQUIPMENT
- 6% SURVEILLANCE
- 5% COMMUNICATION EQUIPMENT
- 3% RISK SERVICES & PROTECTION
- 4% SCREENING & DETECTION
- 6% OTHER
- 5% DATA ANALYTICS & STORAGE
- 4% ACCESS CONTROL & IDENTITY MANAGEMENT

SECURITY & RESILIENCE REGIONAL EMPLOYMENT

The security and resilience sector employs people in all regions and nations of the UK.

ADS
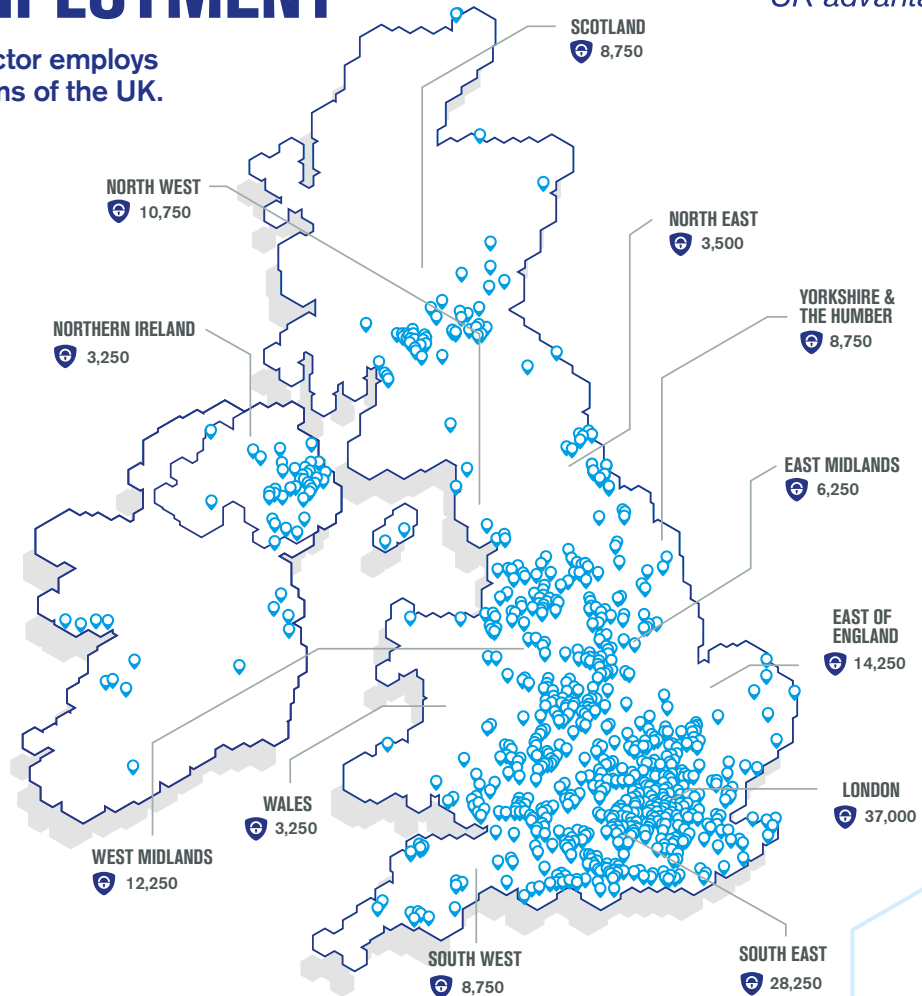*Securing UK advantage*

SECURITY

REPRESENTS NUMBER OF DIRECT EMPLOYEES IN SECURITY AND RESILIENCE SECTOR

INDICATES THE LOCATION OF AN ADS MEMBER WHICH IS ACTIVE IN THE AEROSPACE, DEFENCE, SECURITY OR SPACE SECTOR

SCOTLAND 8,750

NORTH WEST 10,750

NORTH EAST 3,500

YORKSHIRE & THE HUMBER 8,750

NORTHERN IRELAND 3,250

EAST MIDLANDS 6,250

EAST OF ENGLAND 14,250

LONDON 37,000

WALES 3,250

WEST MIDLANDS 12,250

SOUTH WEST 8,750

SOUTH EAST 28,250

Aimie Stone
Chief Economist
T: +44 (0) 207 091 4532
Aimie.Stone@adsgroup.org.uk

X @ADSGroupUK

Nathan Mathiot
Head of Policy
T: +44 (0) 20 7091 1134
Nathan.Mathiot@adsgroup.org.uk

in @ADSGroupLtd

ADS is the UK trade association advancing leadership in aerospace, defence, security and space, to enable prosperity and clean, secure growth for our nation.

ADS Security Outlook 2023 uses data estimates for 2022 data compiled by Oxford Economics in 2023, as well as ADS own sources and information from Government publications.

Front cover image courtesy of Tensor PLC