



UK SECURITY & RESILIENCE OUTLOOK

2023

A guide to the UK security
& resilience sector



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.



£ **9.5** BN
EXPORTS



£ **12.8** BN
VALUE ADDED



145 K
DIRECT
EMPLOYEES



5.8 K
APPRENTICES

£ **23** BN
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.

INTEGRATED REVIEW AND DSIS UPDATE

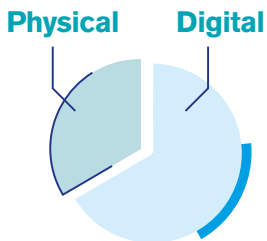
- The previous Government commissioned an update to the 2021 Integrated Review, which is imminently expected for publication in Spring 2023. Although it is expected that the overarching analytical framework will be retained, this will provide an important opportunity to refine the UK's strategic approach considering the war in Ukraine and consequent impacts on economic security and national resilience.
- It is also expected that this will be followed shortly by an update to the 2021 Defence and Security Industrial Strategy (DSIS), which has acted as a lodestar for government-industry engagement. Any change in policy intent could have significant implications for the sector and this will be a priority for ADS in 2023.

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



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**

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 is on policing innovation, protecting our people and places, and advancing national security and resilience.

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 will shape the update to the DSIS to promote closer industry-government collaboration and deliver joint projects focused on Martyn's Law, future transport security capabilities, and border security policy development.





**ADS IS THE UK TRADE ASSOCIATION
ADVANCING LEADERSHIP IN
AEROSPACE, SECURITY, DEFENCE
AND SPACE, TO ENABLE PROSPERITY
AND CLEAN, SECURE GROWTH FOR
OUR NATION.**

ADS works with local, regional, and national Government departments and agencies in the UK and with international organisations involved in policy-making that impacts our sectors to achieve this.

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

Exports by capability data sourced from UK Defence and Security Exports data for 2021.

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