



Department for
International Trade

Defence & Security
Organisation

Security Export Strategy

Growing UK exports for global security



Contents

Foreword	5
Executive Summary	6
Introduction	7
Our Approach	8
The UK Security Sector	9
The UK's Products and Capabilities	10
Case Study - Abbey Protect	11
The Global Buying Environment	12
Security Buyer Profiles	14
How the UK Government Supports Exporters	16
Case Study - Concept Smoke Screen	18
Our Priority Markets	19
Strategy Implementation	20
Case Study - ArGo	22



A technician using a Foster & Freeman Crime-Lite forensic light source

Foreword

The UK is a world-leader in the security sector. We are the fourth largest exporter, with sales of over £5.2 billion in goods and services in 2018. In the last year, UK companies have won multi-million pound deals ranging from access control solutions to Indonesia, X-ray screening equipment into Europe and counter drone systems for North America.

This, alongside the Cyber Security Export Strategy published in March 2018, sets out how DIT will lead the UK Government in strengthening support to British firms who are part of our vibrant security ecosystem.

The Government is committed to helping bring the expertise of the UK security sector to a global audience, supporting them to win work and thrive overseas. We will share our experience of combatting complex threats with our international partners and work with them to ensure they have the capabilities they need to keep their citizens safe.

This strategy sets out how the whole of Government will work together to bring innovative tools, products and methods to overseas markets. We will continue to partner closely with industry, including through their trade associations, to develop compelling offers that will accelerate the continued year on year growth of security exports.



The Rt Hon Elizabeth Truss MP

Secretary of State for International Trade
and President of the Board of Trade

Executive Summary

We are publishing this strategy amidst the global challenges that countries face in a world where the threats to the safety and security of people and infrastructure are increasing. It highlights the types of organisations that typically purchase security solutions and what their drivers are. It also identifies the priority markets where the resources that Government has at its disposal can have the most impact.

This document mirrors the four themes of the Government's wider 2018 Export Strategy and builds on the work of the previous security strategy from 2014. It sets out how we will **encourage** companies to export; provide **information** on how to sell overseas; **connect** them with potential buyers and partners overseas and finally ensure that they have access to the necessary **finance** to realise these opportunities.

The UK's security sector has many world-class solutions and this strategy highlights some of those on offer which can meet the requirements of clients around the world.

Acknowledging that this is a sector largely dominated by small to medium sized enterprises (SMEs) with limited resources, navigating and accessing the support available from government can be challenging.

The Department for International Trade Defence and Security Organisation (DIT DSO) is leading the work within Government, in partnership with private sector organisations who have an interest in the security space, to bring the best of the UK's expertise to bear in support of exports. Case studies included in this document also show how typical UK SMEs have drawn on Government support to successfully win business overseas.



An ATG Access Surface Guard Barrier

Introduction

“It is the first responsibility of government in a democratic society to protect and safeguard the lives of its citizens.”

Across the globe, governments, businesses and individuals are united by the same challenge – how to stay safe in an ever-changing world. As the threats have evolved, more innovative solutions have been required. As a result, both Government and the security sector have risen to meet this task.

Following on from the Government’s 2018 Export Strategy, this document outlines how we will support the specific needs of companies of all sizes in the security and resilience sector. It builds on the foundations from the 2014 strategy ‘Increasing our security exports: a new government approach’ and sits alongside the Cyber Security Export Strategy, published in 2018.

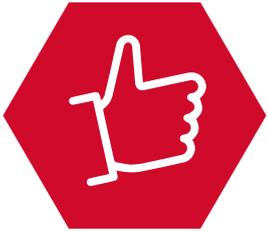
Within Government, the Department for International Trade (DIT) takes the lead on work to achieve UK and global prosperity by promoting and financing international trade and investment as well as championing free trade. Within DIT it is the Defence and Security Organisation (DSO) that undertakes this work with the security sector. Most end-users for this sector’s products and services however are not government.

This strategy therefore supports businesses, academia and industry bodies to bring the best of British innovation to a global audience.



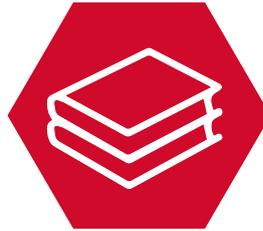
Our Approach

In line with ensuring our focus is on the core functions that government can perform, our approach is to:



Encourage

Assist businesses in the security sector to export by raising awareness of the opportunities that selling products and services abroad represents for business growth; encourage the diverse UK security industry to come together through our partner networks to realise the benefits of collaboration; providing appropriate training and capability development projects and promoting participation in our export advocates programme.



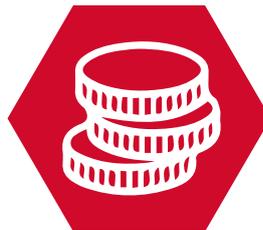
Inform

Help businesses in the sector by signposting them towards the information, advice and practical assistance that they need to export; provide regular briefings on security export opportunities and develop targeted campaigns to raise awareness of the tools available on the Exporting is GREAT website to support successful exporting activity.



Connect

Link companies in the security sector with potential buyers or partners overseas through security-specific outward and inward trade missions, meet the buyer events and domestic and foreign security conferences; make use of resources from across Government to promote the UK's capabilities and ensure that UK government staff that are engaged overseas are informed and able to promote the sector's strengths.



Finance

Ensure that no viable UK security export fails for a lack of finance or insurance from the private sector through promotion of the UK Export Finance offer (UKEF) to the Small to Medium Enterprises (SMEs) that predominate in the sector via briefings with UKEF staff.

The UK Security Sector

The UK's police forces and intelligence agencies have a well-deserved world-class reputation, built on a long history of outstanding public service. In addition, our private sector security industry is well regarded for its integrated approach to maintaining secure environments with minimal fuss and disruption. Supporting them both is a UK security sector which is a global leader in a wide range of products and services.

One of the objectives from the UK's 2018 Strategy for Countering Terrorism, CONTEST, is an enhanced public-private sector collaboration to keep the UK safe. A healthy UK security sector is maintained by exploiting the opportunity to export. A healthy UK security sector is better placed to support our national security and that of our partners overseas.

Over 9,000 security sector companies are active in the UK; most of these are SMEs. Export values reflect this large variety of companies. In 2017, individual recorded sales ranged from £6,000 to £1bn.

UK companies combine technical expertise and a world-leading research base with a history of security excellence and leadership in developing global standards. They are ideally placed to provide expert, trusted advice and services to buyers across the world.

The majority of companies in this sector are represented by UK-based trade associations such as ADS, the British Security Industry Association (BSIA), the Fire Industry Association (FIA), TechUK and others. The UK Government works closely with them all as well as with the overarching UK Security and Resilience Industry Suppliers Community (RISC).

RISC is the UK's leading security industry alliance and serves as the principal channel of communication between the sector and government departments on requirements and policy issues. In order to support the sector RISC has created an international group which is a key collaborative mechanism through which industry and Government can work together.

UK Government plays an active part in supporting the security sector. In addition to work carried out centrally in the Home Office, Ministry of Defence and Department for Transport, agencies such as the Defence Science and Technology Laboratory (Dstl), Joint Security and Resilience Centre (JSaRC), Centre for the Protection of National Infrastructure (CPNI), the Defence and Security Accelerator (DASA) and the National Counter Terrorism Security Office (NaCTSO) also support the development of solutions to counter terrorism and crime. This comes together under the Security and Resilience Growth Partnership (SRGP), jointly chaired by the Home Office's Minister of State for Security and RISC, which considers the domestic and overseas landscape.

**Over 9,000 companies are active in the
UK's security sector**

The UK's Products and Capabilities

The UK's unique strengths and brand are at the heart of the industry's compelling offer, demonstrated by the 95% growth in exports by the sector between 2012 and 2018.

The agile and innovative SMEs in the sector are particularly well placed to support the changing security landscape by offering a mixture of planning, capability development and training as well as technological solutions. UK companies can offer solutions that span the depth and breadth of the security sector.

These capabilities include:

- Access Control & Identity Management including cards, key pads, biometrics, door locks, bolts, physical barriers and area protection, perimeter fencing and counter-IED infrastructure.
- Command & Control including information technology, computer-aided dispatch, physical security information management, geographical information systems, public service answering points, managed services and integration.
- Communications including radio equipment, fibreoptic and satellite equipment, network solutions and integration.
- Data analytics including storage, big data solutions and data intelligence.
- Risk services including advisory and analysis, maritime protection, VIP protection and anti-theft systems.
- Detection technologies for the screening of baggage, vehicles and people, from hand-held devices to large sensor arrays.
- Surveillance systems including CCTV, drones, storage, analytics, networks, novel technologies for locating and identifying unmanned aerial vehicles and active and passive radar.
- Vehicles including sirens and blue light services, fixed wing and rotary aircraft.
- Personal protective equipment including shields, vests and CBRNE suits.
- Fire equipment including active fire protection (detection and alarm systems, sprinklers, mists and inert gas systems), passive fire protection (structural fire protection, fire stopping and fire doors) and fire and rescue (appliances, hoses, uniforms and breathing apparatus).
- Managed services including manned guarding, total security solutions, security as a service.
- Provision of products and services in support of humanitarian and disaster-relief efforts.

The UK's security sector saw a 95% growth in exports between 2012 and 2018

Case Study

Abbey Protect

Abbey Protect provides a wide portfolio of services to help organisations stay safe. These include risk and threat assessments; assistance in strategic police and security planning at both local and national government level; high quality training tailored to organisational needs and a range of products which provide blast, ballistic and forced entry protection.

The company's recent successes include blast testing work with an important North African client which has led on to further projects in 2019. They have also begun working with a large nongovernmental organisation (NGO) in Geneva to pilot solutions on one of their sites with more work to come this year.

Making use of support provided by DIT, Abbey Protect has recently partnered with a Scandinavian security company to begin working in Norway and attended a security event in Oslo. DIT DSO facilitated introductions to Norwegian Government and local commercial security planning organisations. Another DIT DSO event in Paris provided access to French police forces and to security and facilities management companies working in France and wider Europe.



An Abbey Protect security door

“

DIT DSO have been invaluable in assisting our operations overseas. They have provided us with great advice but more importantly, they have given us access to potential clients we would otherwise have found it difficult to reach. Working with the staff in London and in Embassies overseas we have been able get a good feel as to when or when not to move forward in any particular country. As a matter of course we now contact the locally-based DIT DSO officials whenever we work abroad.

”

Peter Hatton MBE
Head of Global Logistics,
Abbey Protect

The Global Buying Environment

Globally, the security market (including cyber security) exhibits continued growth year on year and is projected to reach £150bn by 2022. Buyer behaviour is becoming more discerning and sophisticated, influenced both by global leading practice and by the ease of accessing market and technical information online.

Digital is disrupting procurement across all sectors. Recent research has shown that 50 to 80% of the buying process is typically complete before a salesperson becomes involved and 90% of decision makers say that they never respond to uninvited sales calls.

Buyers around the world come better prepared with clear specifications and requirements. They now engage more frequently at a technical level to ensure that any solutions purchased meet their needs as well as providing best value. UK businesses need early awareness of opportunities in order to influence specifications and to pitch an appropriate mix of technical and commercial information - 74% of buyers choose the company that is the first to add value.

Long bid timelines are often challenging for SME exporters with limited resources. To cut these down, purchasers increasingly using multi-year qualification frameworks to satisfy their equipment and service needs.

Alternatively, in some areas, managers are continuously refreshing their procurement categories and lists of pre-qualified companies. Early engagement, introductions and the development of constructive relationships is therefore key.

Companies also need to be able to draw on case studies in order to support the development of credible offerings. Commercial requirements are becoming more stringent, both in terms of pricing transparency and the necessity for local content.



A selection of AMPAC Europe's UK-manufactured sensors and beacons.

Globally, sales in the security sector are growing year on year and are projected to reach £150bn in value by 2022



Security Buyer Profiles

This strategy identifies the seven most promising areas for the UK security industry worldwide, based on global spending and where UK companies can provide real expertise. The UK has world-class products and services in these areas and UK institutions and organisations have a strong international ‘brand’ upon which to trade.

Central Government

Characteristics – Central Government departments are seeking high assurance security solutions for their estates.

Drivers – Overseas governments are being subjected to heightened terror threats and the need to increasingly raise the bar in managing security discreetly and without friction in the environs of the government estate.

Infrastructure

Characteristics - A diverse group spanning commercial and residential urban developments to offshore oil and gas installations. Security solutions in this area are increasingly dictated by rules around compliance, international regulations and standards.

Drivers – The growth in terror threats is increasing the importance of secure buildings and working environments is an enormous growth sector for industry: globally, investment is forecast to reach £75 trillion by 2040. Security and fire products also have an important role to play in the development of ‘Smart Cities’, whose requirements will involve both new technologies and resilience to be baked into the urban landscape.

First Responders

Characteristics – Emergency services and other first responders have a unique set of capability requirements that are shared between them; personal protective equipment, forensics and analysis of large data sets for example.

Drivers – Greater interoperability is required between different emergency services to improve efficiency and the speed of responses, and the range of potential scenarios is expanding.

Border Security

Characteristics – Covering the whole range of entry points (sea, land and air), border management and monitoring needs range from simple perimeter detection systems to more complex explosives trace detection and identity verification.

Drivers – In addition to the threat of terrorism, the growth in migration (both legal and illegal) and the movement of illicit goods is putting increasing pressure on border management organisations.

Major Events Security

Characteristics – Sporting and entertainment organisations are seeking expertise and guidance on how to provide enhanced discreet security at large scale events, while maintaining the flow of people through entry and exit points.

Drivers – Recent terror attacks at major events have been crude and unsophisticated but have highlighted the risks involved at venues and other crowded places. This in turn is driving an increase in security preparations and response.

Critical National Infrastructure (CNI) Protection

Characteristics – CNI buyers from both Government and the commercial sector are seeking novel ways to design, manage and improve the security of often large infrastructure perimeter and security zones.

Drivers – Improvements to infrastructure are now seen as fundamental to a country's future prosperity and its attractiveness to investors, a substantial part of which will be the security environment. Novel threats from UAVs also require new security solutions.

Transport Security

Characteristics – Transport hubs are becoming larger and more complex. Public and private sector bodies are looking for physical security solutions that do not unduly impede the flow of passengers and freight.

Drivers – Unsophisticated terrorist threats on public transport have been the specific focus of attacks in recent years. New technologies such as crowd-modelling using big data are now sufficiently mature to provide mitigation in the face of such threats.



A technician using a Tensor access panel

How the UK Government Supports Exporters

Both existing and potential exporters in the UK security sector can make use of a wide range of Government support, including the following:

Online Support

The Exporting is GREAT website provides comprehensive advice and guidance to businesses on the preparations that should be made when considering exporting. This includes how to create an export plan, defining your route to market, managing your legal and ethical compliance and what considerations you should make when preparing to do business in a particular country.

<https://www.great.gov.uk/>

The online tools also provide the opportunity for companies to create an online business profile. This provides potential customers with an easy way to find UK products and services and can be used to showcase company capabilities.

<https://www.great.gov.uk/find-a-buyer/>

The Exporting is GREAT website also provides a regularly updated and searchable database of exporting opportunities, where overseas customers can set out their requirements for products and services. It also provides listings of events and trade shows, both foreign and domestic, aimed at particular sectors.

<https://www.great.gov.uk/export-opportunities/>

<https://www.events.great.gov.uk/>

DIT Defence and Security Organisation

Beyond online support, DIT DSO can provide more specialised support to companies in the security sector. This includes arranging bilateral meetings with governments who are looking for specific UK capability; providing support at exhibitions (including visits to stands by high-level delegations); the opportunity for exporters to exhibit under clear Government branding and the provision of on-the-ground assistance for product demonstrations. More information of how we can help can be found here:

<https://www.gov.uk/dit-dso>

Finance and Insurance Support:

The Government's Export Strategy has finance at its heart. As the UK's export credit agency, UKEF works to ensure that no viable UK export fails for lack of finance or insurance from the private sector, while operating at no net cost to the taxpayer. UKEF helps UK companies win export contracts by providing attractive financing terms to their buyers through buyer credit facilities and direct lending. Find out more at:

<https://www.gov.uk/government/organisations/uk-export-finance> for further information.

Supporting Innovation:

The UK supports innovation through the Catapults established by Innovate UK to support specific areas of industry. At these sites the very best of the UK's businesses, scientists and engineers work side by side on late-stage research and development to transform high-potential ideas into new products and services and include sites across the UK. Find out more information here:

<https://catapult.org.uk>

To meet specific challenges, Government funding for the sector is available. Sources include the Defence and Security Accelerator (DASA), Small Business Research Initiative (SBRI) and Future Aviation Security Solutions (FASS) programme. These provide funding to help companies develop their ideas in order to bring innovative products and services to the market.

Exporting Responsibly:

The UK's system of export controls is administered by the Export Control Joint Unit (ECJU), which brings together operational and policy expertise from the Department for International Trade, Foreign and Commonwealth Office and Ministry of Defence.

ECJU exists to help ensure exporters operate responsibly and within the law. It issues licences which can include dual use items that have both military and civilian applications. Find out more information here:

<https://www.gov.uk/government/organisations/export-control-organisation>



A Coltraco Portalevel MAX for inspecting liquid levels in fire suppression systems

Case Study

Concept Smoke Screen

Concept Smoke Screen Ltd was formed with the specific goal of developing security fogging systems. The company has applied modern technology and innovation to a concept that was originally developed in the 1970s to provide a bespoke security solution for the Bank of England.

Smoke screen security fogging devices provide a highly effective deterrent and the physical means to protect people and property, often when other means of conventional security have failed. They can help stop attacks on ATMs and banking halls where perpetrators are using violent or explosive methods and offer a cost-effective solution for retailers. Current UK users include Tesco, Boots, Goldsmiths and others who need to protect their people and stock.

Brazil's largest privately-owned bank was experiencing attacks on ATMs at an astonishing rate of 90 per month. Following a UK Government organised trade mission to South America, Concept Smoke Screen was able to identify a partner in South

America and sign a contract with the bank. Their system was subsequently rolled out to over 7,000 sites and the attacks ceased. The thieves however started to attack other banking facilities in the region, who subsequently adopted the technology. Today over 16,000 machines have been deployed throughout Brazil.

Ongoing support by DIT relating to market penetration and consolidation has resulted in export sales worth £6 million over the last 5 years. Concept Smoke Screen continues its collaboration with the department and with industry membership body the BSIA where it is a principal member of the Security Equipment Manufacturers Section and the BSIA Export Council.



Concept Smoke Screen's Sentinel security fogging system

Our Priority Markets

In collaboration with other parts of Government DIT will lead work in our priority territories, engaging at a Government to Government level on large programmes. This activity will focus on sales to governments and large business. We will seek opportunities in the following priority markets

The Americas

A region comprising large developed countries with mature capability in security and smaller developing countries with significant domestic threat. The Frost and Sullivan Global Security Expenditure Forecast predicts that in 2019 security expenditure in this region will be \$50.8bn

Europe

The UK's regional relationship is going through a period of change as a result of EU exit; however, border management and domestic threats remain a significant consideration for European countries. By 2019 it is forecast that security expenditure in Europe will be \$40.6bn.

Middle East

Security expenditure in the Middle East focuses on government, national infrastructure and financial sectors, particularly central banks. By 2019 it is forecast that expenditure in the region will be \$13bn.

Asia Pacific and Australia

This region provides the largest security expenditure in terms of regions; the key drivers are ongoing investment in security technology across cities and critical national infrastructure in China and India. By 2019 It is forecast that security expenditure in the region will be \$50.1bn. Infrastructure is a significant growth area for Asia, and it is set to continue to dominate the global market, accounting for 54% of global infrastructure investment needs by 2040. China alone will account for 30% over the next 25 years.

Strategy Implementation

To help companies in the UK's security sector who are exporting, or who have a desire to export we will implement this strategy in line with the four pillars set out in the Government's 2018 Export Strategy - encourage, inform, connect and finance. DIT DSO will take the lead to deliver a whole of Government approach, working collaboratively across departments. The Home Office, Foreign & Commonwealth Office, Department for Transport, Department for Business, Energy & Industrial Strategy and the Ministry of Defence will all be key partners.

DIT DSO will also engage with CNI and policing agencies where appropriate, including the Centre for the Protection of National Infrastructure (CPNI), National Counter Terrorism Security Office (NaCTSO), National Police Chiefs' Council (NPCC), National Crime Agency (NCA) and individual police forces.

Working in partnership with industry is key and to facilitate this the Secretary of State for International Trade and RISC signed a collaborative agreement in March 2019 to promote UK security exports and work together to implement this strategy.

The shared high-level principles agreed were:

- a) Open and inclusive partnership between Government and industry;
- b) Commitment to work with, and support, the diverse UK security and resilience sector;
- c) Shared determination to deliver and support a whole of Government approach, harnessing the positive and respected UK security brand;
- d) Commitment to supporting SMEs, given their prevalence in the sector;
- e) Maximising synergies between UK national security and the economic objective of growing UK exports.

DIT DSO will also engage in a process of continuous improvement, reviewing the strategy on a six-monthly basis with partners, both internal and external including the cross-Government Minister-led Security & Resilience Growth Partnership, to ensure that we are continuing to deliver what the sector values.

Specifically, DIT DSO will:

- Promote the use of digital channels to improve awareness of export opportunities and to spur first time exporters.
- Provide opportunities for security companies to become involved in the DIT Export Champions programme.
- Invest in developing commercial security sector knowledge across Government, drawing on the expertise of the trade associations and industry.
- Develop compelling offers and campaigns to attract foreign buyers.
- Engage with decision makers in target organisations overseas to build trusted relationships, sharing the UK's insight, experience and expertise to allow DIT DSO to help buyers define their security requirements.
- For large projects DIT DSO will create bespoke capability packages for buyers and guide UK companies to help them pitch successfully.
- Ensure that all DIT staff at home and overseas consider security and resilience needs within their campaigns at an early stage.



- DIT DSO will provide trade briefings and in-country support to locations where other UK departments or agencies are already actively providing advice and where security export opportunities may exist.

DIT DSO's goal is to be an enabler for the continued year on year growth of exports by British companies in the security sector. We hope to grow these from £4.85bn in 2017 to £7.3bn by 2022 and to increase the number of security companies to which we provide support.

To ensure a consistent approach to overseas and domestic security DIT DSO will work closely with Home Office International Directorate. In doing so we will embed security exports into UK policy development and provide input to the International Strategy Board where appropriate. In addition, JSaRC will also work with us to showcase UK capability, by:

- Promoting a coordinated trade and prosperity message through Ministerial and senior officials' overseas engagements; promoting the capabilities of UK industry and including explicit references to DIT support where appropriate.

- Offering demonstrations to inward visits of foreign buyers as part of their ongoing test and evaluation trials. These trials help UK companies assess their equipment and solutions in live environments, showcase their capability and potentially shape the future market.
- Provide support to UK trade missions overseas where their expertise can add value, and help to identify export potential amongst UK suppliers.
- Actively promoting the UK Government's premier annual industry showcase, 'Security and Policing', with overseas partners in collaboration with DIT DSO.

Case Study

ArGo

ArGo is a trade association representing UK SMEs involved in Humanitarian Aid and Disaster Relief, who came together as a group to allow mutual support and a collaborative approach to project delivery. ArGo was formally launched in April 2016 and membership has now grown to thirty-five companies.

ArGo's resources are comprehensive, allowing the group to be able to handle command and control response efforts, provide life support (power, shelter, clean water, food and so on) and carry out remedial activities to bring critical infrastructure back online.

Both independently and in collaboration with each other, ArGo members have been involved in numerous high-profile incidents around the world including the Sulawesi earthquake, Hurricane Irma and winter floods in both the UK and the Republic of Ireland.

“

ArGo was formed with the assistance and support of DSO. DIT hosted our launch seminar and promoted our capability to the trade representatives in Embassies and High Commissions around the world. ArGo has an enduring and open relationship with the DIT DSO desk officers in London, and many members have their own relationships with Government departments. This allows us to harmonise our approach with the UK Government's policies and priorities. ”

Zal Rustom

CEO, Ambipar Response/Chair, ArGo





DIT

The UK's Department for International Trade (DIT) has overall responsibility for promoting UK trade across the world and attracting foreign investment to our economy. We are a specialised government body with responsibility for negotiating international trade policy, supporting business, as well as delivering an outward-looking trade diplomacy strategy.

DIT DSO works with industry and overseas governments to ensure that UK equipment, products and services are promoted in the best possible way. DIT DSO also ensures that overseas customers' requirements are appropriately met and supported by industry.

DIT DSO staff provide specialist export advice and practical assistance to the defence and security sectors, working closely with both industry, the Ministry of Defence (MOD) and the Home Office to provide the essential government-to-government dimension to company-led marketing campaigns.

Legal disclaimer

Whereas every effort has been made to ensure that the information in this document is accurate the Department for International Trade does not accept liability for any errors, omissions or misleading statements, and no warranty is given or responsibility accepted as to the standing of any individual, firm, company or other organisation mentioned.

© Crown Copyright 2019

This publication is licensed under the terms of the Open Government Licence v3.0 except where otherwise stated. To view this licence, visit nationalarchives.gov.uk/doc/open-government-licence/version/3

Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

Any enquiries regarding this publication should be sent to us at enquiries@trade.gov.uk

Published September 2019 by
Department for International Trade.