



UK Trade
& Investment



Home Office

Increasing our security exports

A new government approach



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Foreword

The United Kingdom has a wealth of security expertise refined over many years of countering terrorism and other crime, controlling borders and most recently, through the safe and secure delivery of the London 2012 Olympic and Paralympic Games.

The know-how, capability and technologies which secure our nation are delivered by the UK Government in partnership with the UK security industry.

The Government is fully committed to supporting our security industry, notably in export markets. The UK seeks to be the partner of choice for those countries who are seeking world leading, trusted and proven security solutions. This strategy sets out the UK's strengths and capabilities in seven areas of security. It describes how the Government will provide immediate and practical assistance to UK exporters and to overseas customers who have requirements in these areas.

UKTI's Defence and Security Organisation and the Home Office will continue to work closely together in delivering this strategy. We need to build on the already strong partnership between industry and government and work hand in hand to achieve our objective to increase UK security exports.

We thank everyone who has contributed to this strategy, especially those private sector organisations that have put a significant amount of effort and time into sharing their ideas and issues with us.



Livingston *of Parliament*

**Lord Livingston,
Minister for Trade
and Investment**



Karen Bradley

**Karen Bradley MP,
Home Office
Parliamentary Under
Secretary of State**

Introduction

The UK has a strong reputation for security. Our agencies and police are amongst the best in the world. Our strategies for tackling terrorism and crime are well regarded. The security operation to protect the London 2012 Olympic and Paralympic Games was rightly regarded as a major success.

From homeland security and border control to surveillance and detection equipment, UK companies are at the forefront of designing, manufacturing and selling security-related goods and services all over the world.

In comparison with the defence sector, which consistently captures about 20 percent of the global defence export market, the UK security sector currently achieves just over four percent of the global security export market.

The Defence and Security White Paper *National Security through Technology* published in February 2012¹ recognised that a healthy and competitive UK security industry can make a significant contribution to our national security. It can create jobs, maintain skills and sustain advanced manufacturing and technological capabilities. The White Paper noted that whilst the UK is the second largest defence exporter in the world, our performance in the security export market is not consistent with our reputation and expertise. The White Paper concluded that the Government should provide further support to industry to improve its export performance.

The White Paper committed the Government to creating a new Senior Responsible Owner (SRO) role, with a remit to coordinate government's support to the security industry. The SRO, Director of Security Industry Engagement, was appointed in June 2013, working within the Office for Security and Counter Terrorism in the Home Office and reporting to Home Office Ministers.

This strategy, produced by UK Trade & Investment Defence and Security Organisation (UKTI DSO) and the Home Office sets out our approach to the security export market. It will be supplemented with sector specific reports, the first of which covering cyber security exports was published in May 2013².

Achieving a significant increase in security exports is important to industry as well as to our National Security Strategy. Security exports facilitate security cooperation and contribute to our prosperity.



1. www.gov.uk/government/publications/national-security-through-technology-technology-equipment-and-support-for-uk-defence-and-security-cm-8278--2

2. www.gov.uk/government/publications/cyber-security-the-uks-approach-to-exports

Aim and scope

Aim

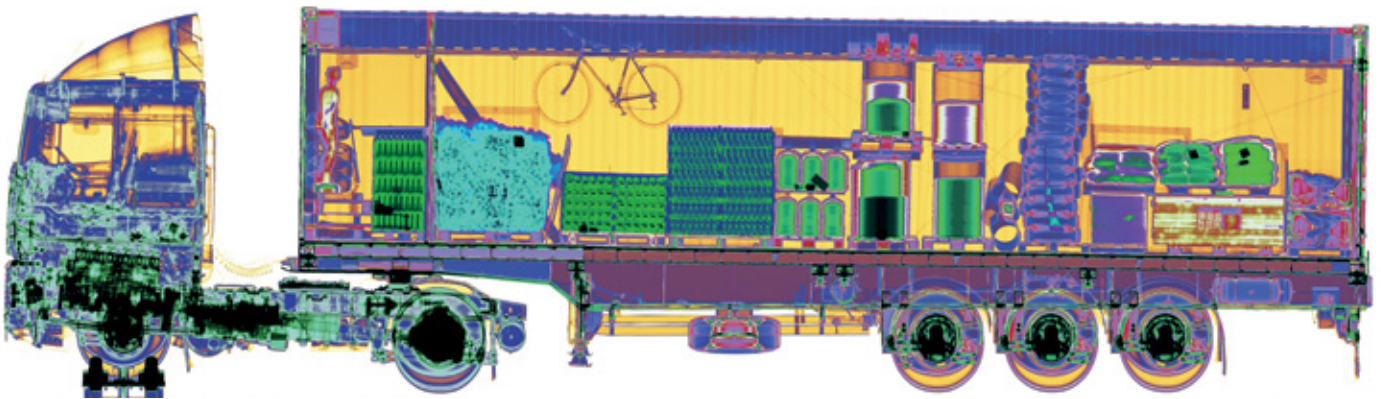
Our aim is to achieve a significant increase in UK security exports, thereby increasing the UK's share of the global security export market, in line with the UK Government's wider trade targets set out in the 2012 Budget.

Scope

This strategy sets out:

- **The scale and importance of the global security market and UK performance**
- **UK strengths, market drivers and challenges**
- **The UK offer, focussing on seven key capability areas, coupled with an understanding of what makes the UK unique**
- **Our four pillar approach to increasing security exports**
- **Current priority markets, opportunities and export controls**
- **How the UK security industry can engage with UK Government on exports.**

The strategy applies to all parts of the security sector, drawing on the experience of Primes and Small and Medium Enterprises (SMEs). It focuses on parts of the sector which will benefit from government support and where intervention can have the greatest impact – where the end customer is anticipated to be an overseas government organisation. The general services provided by UKTI, either by DSO or the regional or international network will be of benefit to any security company looking to export, regardless of specialisation. In some parts of the sector, for example cyber security, the majority of export opportunities are likely to arise in the business to business space, where UK Government can also offer support.



The growing importance of security exports

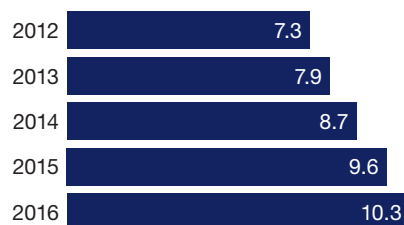


The global security market and UK performance

The global security market³ was estimated to be £410 billion in 2012 and is forecast to rise to £571 billion in 2016 through expected average annual growth of nine percent. The export market in 2012 was estimated to be £64 billion, a rise of three percent on 2011.

Much of the global growth shown in Figure 1 will be driven by double digit increases in cyber security export activities.

Figure 1: Annual global security market growth rate (forecast %)



3. As defined by KMatrix in annual reports for UKTI DSO

Figure 2 shows that UK security export figures have grown steadily over the last four years reaching £2.7 billion in 2012, an increase of four percent over the previous year. The 2012 performance gives the UK a 4.2 percent share of the global market.

Between 2011 and 2012 the sub-sectors experiencing the highest growth, of at least seven percent, were cyber threat intelligence, situational awareness and system recovery. Export growth for all other sub sectors was much lower, ranging from 0.4 percent (access control systems) to 2.3 percent (manned security).

Thirteen export destinations account for 67 percent of all UK exports. The leading destinations are the USA (21 percent), China (13 percent), Japan (seven percent) and India (six percent). This ranking of UK security exports has remained unchanged for the last three years. Figure 3 shows the top 13 UK export destinations by value.

Figure 2: UK security exports 2007-2012 global market growth

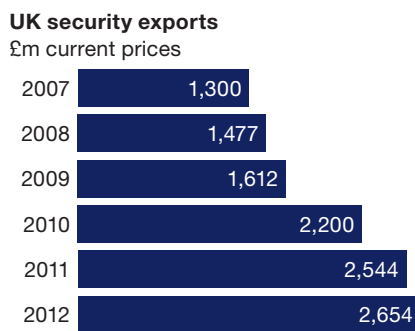
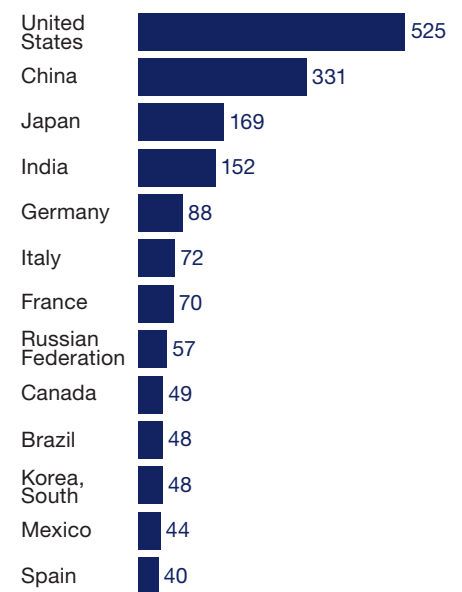


Figure 3: 2012 UK top 13 export destinations (£m)



The market and UK strengths

For the purposes of this document, the definition of the security sector includes homeland security (largely counter terrorism), law enforcement, other emergency response (including fire), commercial security and safety, critical national infrastructure protection, cyber security, 'services' including consultancy and guarding, and the management of large scale events. The security industry is a key element of the UK economy, with 165,000 employees in 11,500 companies.

Market drivers

International terrorism and serious and organised crime are threats to governments across the world. Governments and the private sector are seeking the best available systems to ensure safety and security.

The increasing digitisation of peoples' lives is an overwhelmingly positive development. It opens up great new areas for economic growth and social development. But technology can also increase vulnerability, notably through cyber crime and cyber enabled crime. As we have noted cyber is the most rapidly expanding security sub sector.

UK strengths

The UK security industry is a strong international competitor with key strengths from:

- **History and experience** – years of developing an integrated approach to management and mitigation of security risks in conjunction with government.
- **Innovation and expertise** – high quality, highly skilled labour pool for leading research and product development.
- **Unique international position and perspective** – providing for the widest exposure to international events and partners.
- **Quality, reliability, flexibility and durability** – of products, systems and services.
- **British standards** – often developed in conjunction with the UK Government.
- **End-market intelligence** – the UK security industry benefits from the UK Government's international network of trade advisors based in our Embassies and High Commissions.

Market Challenges

The UK security industry faces challenges in export markets:

- **Pricing** – competition from companies that benefit from a lower cost base in emerging markets.
- **Fragmentation** – lack of coherent identity or accepted/understood structure to the industry.
- **SME resource** – many smaller companies lack sufficient resource to effectively stage medium/long term export campaigns.
- **Coherent marketing** – UK security capability is not always promoted as much as the capability of some competitors.
- **Universal standards** – perceived incompatibility of British security standards with international standards.
- **Export controls** – dual use nature of some security products adds complexity to the export process.
- **Product threat** – challenges to protect intellectual property rights (IPR).



UK capabilities and the UK offer

The UK security industry is recognised as a world leader across a wide spectrum of security capabilities.

To help deliver a structured security export offer and to tailor solutions to overseas requirements, we will prioritise the following capability areas that reflect industry strength and capabilities, demonstrated by market analysis and international interest. Government to Government (G2G) engagement has shown that the UK's reputation, experience and knowledge in these areas are highly valued.



Capability area	Background	Market opportunities
Critical National Infrastructure (CNI) Protection	An area of particular expertise, based on lessons learned over many years. The high quality, hi-tech equipment the UK produces is particularly suited to CNI Protection.	Significant opportunities for equipment, consultancy and training, particularly in the Middle East and Asia.
Cyber security	30 percent of current UK security exports. Average growth forecast 14 percent to 2016. Priority area for UK Government with G2G discussions underway in several countries. Cyber security will form part of many high value opportunities.	India, Brazil and Malaysia have rapidly growing economies and an increasing dependency on cyberspace. A number of countries in the Middle East are now also looking to acquire capability.
Policing and counter terrorism	World renowned reputation in policing, counter terrorism, CBRNe and organised crime prevention. Many countries keen to engage with us on our methods, equipment and training.	Opportunities exist globally, particularly in developing nations and those facing a specific terrorist threat.
Major event security	Significant potential to build on the legacy of the London 2012 Olympic and Paralympic Games.	Host nations of future large sporting events including Brazil, Qatar, Japan and Republic of Korea. The UK's learning and governance model provides an opportunity to showcase UK security industry solutions.
Border security	There is a wealth of UK Government expertise in land, sea and aviation security measures. A priority for regional security in terms of combating human, arms and drug trafficking across vulnerable and unprotected borders.	Major interest in Africa and the Far East. Requirements include land and maritime radar, sensors, UAVs, fencing, command centres, search equipment, CCTV, analytics and biometric documents.
Offender management	Regular interest by overseas governments in the UK public/private sector approach. New prison design and building programmes planned in many countries.	Opportunities exist for design, build and operation of prisons along with specific technologies to detect contraband. The Middle East, Africa, Latin America and Europe offer significant opportunities.
'Services' (including consultancy, training, guarding and risk analysis)	30 percent of current UK security exports. The UK is seen as world leader in security, and UK expertise and training is in great demand. Lone worker security – UK seen as a global leader in this area.	Opportunities exist globally, both within the public and private sectors, particularly in risk analysis, consultancy and training.

More detail on each capability area is set out in Annex A.

Our intention is to develop specific export guides for these capability areas which will be reviewed annually to take account of developments such as UKTI DSO's work on disaster relief.

Our approach

To promote the UK offer and to enhance the UK Government's support to the security industry, we have developed a four stage approach.

Identify

UK industry opportunities in overseas markets.

Promote

UK capabilities and expertise on the national and international stage.

Engage

UK industry on our priority countries and encourage consortia.

Support

UK industry to convert opportunities to reality.



Identify

To IDENTIFY target markets and opportunities for UK industry overseas, we will:

- Continue to commission annual market research on the security export market and share this with industry.
- Source regular analysis from our High Commissions and Embassies on security opportunities in country to be shared with industry.
- Where appropriate, offer UK Government security audits to help priority countries identify and design their requirements and highlight capability gaps.

Key to market analysis is targeted quantitative and qualitative data. For the last four years we have commissioned research which has provided us with information regarding the size of the global security market, together with import and export statistics for individual countries and for different types of security equipment. We will continue to obtain this information and share it as widely as possible.

However, quantitative data alone only provides limited information on the future global security market and the opportunities for UK companies. We recognise that UK companies also need information about specific future requirements and for that reason we will ask British Embassies and High Commissions to update the security survey they completed in 2010 on a regular basis to inform security opportunities in each market. This will ensure that we capture emerging requirements from non-traditional markets.

Companies will still be able to commission dedicated bespoke research with UKTI teams in a particular market through the Overseas Market Introductory Service (OMIS) and our overseas teams will continue to publish tender opportunities through the UKTI website. We will also work across UK Government to understand any political or national capability risks connected with security exports to certain countries. This will help inform UKTI DSO's annual review of its priority markets.

Using both the qualitative and quantitative information that we obtain, we will utilise the 'Forced Choice Model'⁴ developed by UKTI DSO's Advisory Group to determine our priorities. We will develop specific country and capability strategies designed to capture export business, focusing on those markets and capabilities that offer the greatest potential.



4. An evidence based decision making tool to enable us to focus our resources to best effect.

Promote

To PROMOTE the UK security industry and capabilities overseas, we will:

- Negotiate Government to Government agreements where appropriate.
- Coordinate work across government and industry to maximise the success of the London 2012 Olympic and Paralympic Games security planning and operations.
- Support trade missions to priority countries, where possible to be led by UK Ministers.
- Implement a programme of systematic engagement between UK government and key decision makers in priority countries: Ministers will be more personally involved in supporting security exports.
- Represent the UK security industry at domestic and international trade exhibitions and facilitate a significant international presence at the UK annual Security & Policing exhibition.
- Arrange, host and support inward and outward visits by overseas delegations to showcase UK security capabilities.
- Support industry promotional events, such as product launches conducted in British Embassies or High Commissions.



One of the UK Government's key roles is to facilitate market access for UK companies. This can be done in a number of different ways including:

- Government to Government (G2G) agreements.
- Trade missions (these can be particularly effective if led by a Minister).
- Exhibitions (eg Security & Policing and Milipol).
- Hosting foreign buyers in the UK (eg at the Security & Policing exhibition).
- Supporting industry promotional events, such as a product launch conducted in the British Embassy or High Commission.

The UK Government can add value to a UK offer through a G2G agreement. These agreements take different forms, but in principle enable provision of both UK government expertise in security and the world leading capabilities of UK industry.

Through a G2G agreement we would offer, where appropriate: access to security expertise and strategic thinking within government, police and agencies; support to overseas governments to identify and specify their security requirements; and assistance in accessing the necessary capabilities from the UK security industry.

Overseas governments and public organisations place a high value on the involvement of the UK Government in respect of significant trade deals, particular where they seek complete packages of capability, including equipment, support, and training. The UK Government will work to ensure that, where appropriate, industry can offer a rounded package to set us above our competitors.

The UK will consider entering into new G2G arrangements where these are of security, economic and strategic value and in the national interest.

Engage

To ENGAGE UK industry on our priority countries and encourage consortia, we will:

- Through UKTI DSO and the Home Office’s Security Industry Engagement Team facilitate regular dialogue with industry to understand and respond to their needs.
- Work with the UK security industry to understand existing and prospective interests in priority countries.
- Explain clearly to industry our country priorities and the support we can offer.
- Promote partnering between the UK security industry and industries in priority countries.
- Provide sector or country specific briefing days for industry including opportunities to engage directly with UK Ambassadors and High Commissioners.
- Consider ways to ensure SMEs are able to contribute more easily to meeting security requirements, both directly and through the supply chain.

Whilst a UK security industry SME can be successful in overseas markets without external assistance, especially with a bespoke solution for a particular requirement, many overseas governments have stated a preference for dealing with one UK Prime contractor. This arrangement would see the Prime leading all engagement between the government and the UK consortium, across all capability areas.

UK Government will assess the application of this approach to export opportunities on a case by case basis and encourage discussions between companies to agree a UK lead. We will facilitate discussions between UK Primes and SMEs via events such as UKTI DSO’s SME Symposium.



Support

To SUPPORT UK industry to convert opportunities to outcomes, we will:

- Influence governments in priority countries to improve their environment in ways which make investment by UK industry more conducive.
- Pilot a UK security branding system to accredit credible and responsible UK security companies.
- Where appropriate, provide government letters of support or presentations to endorse campaigns /technologies.
- Establish a Security and Resilience Growth Partnership to identify ways in which UK Government, industry and academia can demonstrate the UK's security expertise and capabilities
- Develop a UK security brand to increase confidence in UK security product and services
- Use government networks to support business to business opportunities

The Security and Resilience Growth Partnership will identify ways in which UK Government, industry and academia can demonstrate the UK's security expertise and capabilities, especially our ability to innovate and respond to new and emerging threats. The partnership will:

- Showcase UK innovation in action, improve the delivery of capabilities to UK customers and establish UK credibility for capacity building overseas.
- Provide overseas governments with appropriate access to UK expertise, innovative technologies and novel ways of working as part of building longer term partnership arrangements.
- Encourage consideration of exportability at the point of investment in R&D.
- Prepare the security supply chain to capture and exploit the export opportunities in support of Government to Government, Business to Government and Business to Business programmes.
- Improve the speed with which new ideas and export programmes are brought forward into quick business case wins.

We are also working with industry to develop a UK security brand to support the export of UK security products. This brand would increase confidence in the quality and reliability of businesses operating in the security sector. It would be used to market the UK's security capability in global export markets.

We anticipate that the brand would feature prominently on marketing and promotional materials. It will not interfere with existing product and service accreditations. Any proposed branding process would be voluntary, use existing infrastructure, and be low cost to industry to implement.

In a business to business sale (the majority of which are seen in the commercial security, safety and fire segments of the sector), the UK offer may simply comprise the products and services in question. However, UK Government support via arrangement and sponsoring of 'Meet the Buyer' sessions and promotional meetings, often at UK and overseas exhibitions, can be a valuable asset. Initial Government to Government discussions will often also lead to promotional business to business discussions.



Priority markets

UK Government organisations with an interest in supporting UK security exports have a range of country priorities based upon differing agendas. These include diplomacy; national security; counter terrorism; development aid; border and transport security; and capacity building.

The following sections give an indication of the current priority markets and export opportunities.



The Gulf States

The UK Gulf Initiative, launched in 2010, recognised that the region is critically important to UK security and prosperity. Government to Government relationships in the Gulf can benefit UK industry.

All Gulf states are building security capabilities and have significant resources to do so. Some already have highly sophisticated technology industries that are competitive with UK companies but also offer partnership opportunities.

Saudi Arabia: Strong relationship with the UK on security with a history of collaboration. Significant opportunities matched with high level of security industry engagement.

Kuwait: Growth market for all security sectors with significant UK security industry engagement. The Kuwait Security Programme is a key opportunity which, if secured in a Government to Government agreement, will bring significant opportunities for the UK security industry.

Qatar: Security contracting opportunities in Qatar over the coming years linked to the 2022 World Cup and broader 'National Vision 2030' will run into the billions of pounds.

Oman: Increasing opportunities for cyber and border security based strong relationship with the UK.

United Arab Emirates: significant planned investment in security with programmes to build high tech industries. Cyber security is of increasing importance.

Americas

Brazil: Opportunities for industrial partnership, particularly around the World Cup and Olympic and Paralympic Games.

United States of America: The largest market for UK security exports, with significant potential for increased activity across a broad range of the sector.

Asia

India: Growth export market for the UK security sectors with many opportunities targeted by UK companies.

Japan: Third largest market for UK security exports. Strong potential for increased export of UK expertise and equipment for the Tokyo 2020 Olympic and Paralympic Games. Significant interest in UK cyber security capabilities.

Malaysia: Cyber security of increasing importance with significant UK Government and industry engagement underway.

South Korea: Significant potential opportunities, particularly in aviation security.

Other regional export opportunities

Africa: Significant opportunities as well as challenges for the UK security industry. Many countries plan to improve border and aviation security and better protect critical national infrastructure, including energy and transportation. Training and services are in high demand.

Europe: Growth export market with significant industrial partnership and investment opportunities across the security sector. Cyber security is of increasing importance for NATO and all countries.

High Value Opportunities

UKTI's High Value Opportunities (HVO) programme will identify, prioritise and support businesses to access large scale overseas procurement opportunities. These projects are at various stages of their lifecycles and the specific opportunities open to UK security businesses at any one time will vary.

UKTI DSO will work across the UKTI network and with delivery partners, including the trade associations, to identify the top five HVOs that are of most relevance to the UK security sector and to support UK security companies in developing and implementing strategies to win HVO business.

UKTI identified High Value Opportunities	Location
Rail project	UAE
Metro opportunities	India
Metro System	Kuwait
Klang Valley – MRT	Malaysia
Rail Network	Oman
Rail Network	Qatar
Mass Rapid Transport	Singapore
Light rail	USA
Jubail Petrochemical Complex	Saudi Arabia
Sports Infrastructure	Brazil
Oil and gas	Mexico
World Cup 2022 and 2030 Vision	Qatar
Delhi-Mumbai Industrial Corridor	India
Airport redevelopment	Kuwait
Reconstruction	Libya

Full details of UKTI's HVO programme can be found at www.gov.uk/high-value-opportunities



Export controls

The Government is committed to robust and effective national and global controls to help prevent exports that could undermine our own security and our commitment to human rights and good governance; to protect our security through strategic relationships; and to promote our prosperity by allowing industry to operate effectively in the global market.

We have robust processes that allow the Government to assess the risk of releasing protectively-marked information and exporting controlled items. We recognise that the speed of decision-making on export licences – whatever the outcome – is crucial to potential exports.

Traditional defence export controls do not always readily apply to security systems. Complex issues such as dual use and the inclusion of export-controlled components within commercial systems need to be understood and addressed. But the UK should not export capabilities where there is a clear risk that they will be used to violate human rights or for internal repression, undermine regional security, or affect our own national security.

The Government expects the security industry to observe the Bribery Act 2010 and has published clear, practical guidance on how to do so.
www.gov.uk/anti-bribery-policy

The Department for Business, Innovation and Skills (Export Control Organisation) will continue to advise on export controls for security products and services.



Engaging with Government

UKTI DSO and the Home Office lead government work to support and promote UK security exports, in conjunction with Government and wider public sector partners.

UKTI DSO provides day to day support to industry to ensure effective promotion of products and services. UKTI DSO has employed additional security specialists in the UK and overseas to work on law enforcement and cyber security capabilities. UKTI's Services are set out in more detail in Annex B.

The Office for Security and Counter Terrorism will:

- Identify security requirements overseas for which contracts are likely to be awarded, including large scale projects such as sporting or cultural events and infrastructure projects.
- Develop a comprehensive database of the key decision-makers likely to shape the security exports market in the short term in our high priority countries.

- Promote amongst international partners appropriate security standards, through key security documents (including the CONTEST strategy and planning documents for the London 2012 Olympic and Paralympic Games).

A new Ministerial Working Group on Defence and Security Exports, chaired by the Defence Secretary, will:

- Provide ministerial leadership to the development and implementation of UK Defence and Security export strategy.
- Ensure coherent and effective government support to UK defence and security exports, exploiting synergies between military and security sectors where appropriate.

This group is designed to lead government strategy to set and deliver our exports targets in these markets. It will support government priorities and ensure a more coordinated approach to policy and delivery across departments.

The following table sets out the role of government departments in support of the UK security industry.

Department / Agency	Role
Department for Business, Innovation and Skills (BIS)	Uses its wider industrial knowledge and expertise to help to develop the UK offer. Will also lead on the Cyber Growth Partnership.
College of Policing	Responsible for national police standards, practice, and learning and development. Includes the International Academy at Bramshill.
Department for Communities and Local Government (DCLG)	The Chief Fire and Rescue Adviser supports UKTI and the UK Fire Sector through international engagement.
Department for Transport (DfT)	Works internationally to improve standards of aviation security. Will assist UKTI to identify trade opportunities through their capacity building work.
Foreign and Commonwealth Office (FCO)	Helps identify trade opportunities through its overseas representation and prosperity agenda work. It will also support the realisation of these opportunities through its strong relationships with other governments and direct support to UK companies, including by providing relationship-building events in Embassies and High Commissions. The FCO-owned British Intergovernment Services Authority (BISA) will be a delivery authority for some Government to Government programmes. The FCO also has considerable input into the export licensing regime and leads on the International Defence Engagement Strategy.

Department / Agency	Role
Government Communications Headquarters (GCHQ)	Provides support for the UK cyber offer by engaging with overseas government customers as appropriate, supporting recognised supplier/assurance schemes and providing expert advice to UKTI.
Home Office	<p>The Office for Security and Counter Terrorism is responsible for coordinating cross government work on terrorism and organised crime. It includes a dedicated Security Industry Engagement Team.</p> <p>The Home Office will assist in identifying security requirements and opportunities in priority countries and promote UK work on counter terrorism and against organised crime. It will support commercial activity by the UK security industry overseas and where appropriate the negotiation of Government to Government agreements.</p>
Invest Northern Ireland	Economic development agency for NI with responsibility for supporting companies to develop new export markets. Invest NI works with security companies to support research, overseas visits and exhibitions and seminars. Invest NI collaborates with UKTI DSO and trade associations.
Ministry of Defence (MOD)	Employs its wide network of defence attaches and existing bilateral engagement programmes to provide support for export opportunities and where appropriate to the security sector.
Ministry of Justice (MOJ) and National Offender Management Service (NOMS)	Supports capacity for design and prison build across overseas prison services. Provides justice assistance consultancy services alongside learning and development opportunities and interventions via the Prison Service training college. NOMS will work with UKTI to identify trade opportunities arising from this work.
National Crime Agency	Has a remit to assist countries to build capability for combating serious and organised crime, and to conduct investigations and operational activity with host countries and other law enforcement partners. Through its network of overseas liaison officers overseas, will pass on any identified trade opportunities to UKTI.
Office of Cyber Security and Information Assurance (OCSIA)	Provides strategic assistance across departments, developing policy, strategy and insight on cyber security.
Scottish Development International (SDI)	Joint venture between the Scottish Government, Scottish Enterprise and Highlands and Islands Enterprise; brings together the resources of these organisations to deliver a full package of international business services for Scottish security companies to develop trade worldwide.
Trade Associations (ADS, BSIA, FIA, BSIF, techUK and others including industrial groupings such as RISC)	Work to ensure their members are briefed on export opportunities, engage with HMG regularly on all export issues, provide advice on and inputs to HMG initiatives, and support to export activities.
UKTI DSO	UK Government lead in security export initiatives, helping to build and maintain relationships with potential export customers and providing industry with specialist advice and practical assistance.
Welsh Government	<p>Responsible for supporting Welsh security companies to grow their exports, working with them to build capability and identify opportunities.</p> <p>The Welsh Government has led the way on Trust & Security business development and e-Crime prevention since 2005 and has built up a significant reputation and capability in its work with global leading companies, SMEs, law enforcement and academia.</p>

Conclusion

This strategy has set out how the UK Government will support UK security exports.

The strategy will be reviewed and updated as markets and capabilities evolve. UKTI DSO and the Home Office will work together to implement the strategy, and produce an annual update, reporting results, updated priorities and progress on actions, together with any new export issues which require consideration by UK Government and industry.

UKTI DSO and Home Office will develop specific export plans for the following capability areas:

- Critical National Infrastructure (CNI) Protection
- Cyber security (Published April 2013)
- Border security
- Policing and counter terrorism
- Major event security
- Offender management
- Services – including consultancy and training



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For further information and general enquiries please use the following e-mail contact points:

UKTI DSO

securityexports@ukti.gsi.gov.uk

Home Office Security Industry Engagement Team

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Annex A: Capability areas

Critical National Infrastructure (CNI) Protection



This capability enables public and private entities to identify, assess, prioritise, and protect critical infrastructure and key resources so that they can detect, prevent, deter, devalue, and mitigate deliberate efforts to destroy, incapacitate or exploit a nation's CNI.

The definition of critical national infrastructure sectors may vary from country to country but, as an example, the UK defines nine of these which provide essential services:

- Communications
- Emergency services
- Energy (including pipelines and offshore)
- Finance
- Food
- Government
- Health
- Transport (including roads, airports, ports and railways)
- Water

Capabilities that could be provided from the UK include:

- Command and control
- Communications (both terrestrial and by satellite)
- Fire detection, suppression systems, fire incident command training
- Cyber security
- Explosive and ballistic protection
- Hostile vehicle and vessel mitigation
- Lighting
- Perimeter and access control
- Biometrics
- Screening
- Surveillance from land, sea, air or space
- Training, including HAZMAT and CBRNe
- Threat assessment models and risk mitigation



Cyber security

The UK's cyber security strategy published in October 2011 contained an objective for UKTI DSO to develop a marketing strategy for cyber security exports. The export strategy, published in May 2013, is based on a capability model, developed in conjunction with GCHQ, the Office for Cyber Security and Information Assurance, the Department for Business, Innovation and Skills, and industry. The full document is now available for download here: www.gov.uk/government/publications/cyber-security-the-uks-approach-to-exports

At the core of the model are 10 technical groups which comprise the key UK cyber capabilities:

Security management

Surveillance and reconnaissance

Information operations

Analytics and big data

Social media analysis

Forensics

Transaction protection

Trusted platforms

Identity and authentication

Investigation of offences

A number of services exist to support these technologies including the design of a system, integration of multiple system components and the ability to run these capabilities as a service. Additional services include advice, assurance and training, which can be applied to the whole or any part of the technical capabilities.

The UK Government is committed to working in a number of areas, including the development of the UK offer for cyber security capabilities, compiling a catalogue of UK companies with relevant capabilities and providing marketing material that supports the effective positioning of UK companies against overseas competitors.

The strategy confirms that UK Government will work in the near-term on providing clear guidance on emerging export controls for cyber security capabilities. It also highlights the importance of understanding the developing opportunities in each target country, offering to utilise the extensive network of in-country UKTI and FCO staff to create market analysis and insight that can be disseminated to UK companies interested in working in these markets.



Policing and counter terrorism

UK policing is delivered through over 45 separate police organisations, governed by policies and procedures formulated and agreed through the College of Policing. London's Metropolitan Police Service (MPS), based at New Scotland Yard, is the most internationally recognised brand of UK policing with many countries aspiring to replicate policies and procedures ranging from community policing, crime investigation and public order to command and control.

Counter Terrorism (CT) operations in the UK are run jointly by the intelligence services and the Police National Counter Terrorism Units governed by the ACPO Terrorism and Allied Matters Committee. The UK's counter terrorism strategy (CONTEST) provides a framework for CT efforts under four workstreams, Prevent, Protect, Prepare and Pursue.

UK Government assets such as the Home Office's Centre for Applied Science and Technology (CAST) work in partnership with the security industry and UK law enforcement to develop cutting edge technologies to combat crime, protect police officers and enhance national security.

Capabilities that could be provided from the UK include:

-
- Overt and covert surveillance equipment

 - Command and control centres (systems integration)

 - Intelligence and criminal analytical software/systems

 - Secure communications (radio/IT/resilient and mobile satellite)

 - Wireless transmission of data

 - Forensics (scene examination and laboratory services)

 - CT/serious crime investigation

 - Major event security

 - CBRN training, detection and response

 - National disaster and emergency management

 - Public order and ballistic protection equipment (body protection, shields etc)

 - Specialist vehicle design and equipment

 - Traffic management

 - ANPR

 - Asset tracking, using terrestrial and space-based capabilities

 - Fleet management

 - IED/bomb disposal

 - Outsourcing of support services, including custody centres

 - Use of firearms and less lethal options

 - Close protection

 - Marine and aviation policing

 - Police modernisation (training, IT, equipment)

 - Training across all areas of law enforcement



Major event security

The security challenges surrounding the planning and delivery of large scale events, whether it is the Olympic and Paralympic Games, World Cup or a major political summit, are significant and complex. They may demand specific and unique solutions, depending on the nature, scale and location of the event and the threat environment in which they take place. Most however will feature common capability requirements provided by UK companies such as:

Conceptual security design

Perimeter and venue protection (CCTV, fencing, barriers, cameras access control systems, biometrics)

Command and control

Secure communications (radio/IT/resilient and mobile satellite)

Venue safety and stewarding

Secure ticketing/anti-counterfeiting

Guarding/close protection

Fire and rescue response

Risk analysis and threat management

Crowd modelling

Training

Contingency planning

Disaster management

General equipment used by law enforcement or the military may also be procured in larger numbers to address the scale of these events. Local infrastructure will often have to be enhanced, with hotel, airport and transport projects undertaken to address capacity issues in particular. All of these present significant opportunities for UK companies.



Our hosting of the London 2012 Olympic and Paralympic Games presents us with a significant opportunity to harness and promote our experience to the benefit of UK security companies.

The target customers for security equipment in relation to large scale events will vary depending on the event and the country in which it takes place. Construction will tend to be undertaken by local contractors, with specialist design and consultancy brought in from elsewhere if required.

Given the significance of the events, Governments will often oversee the various projects and be responsible for providing assurances on the security arrangements to be put in place. This tends to be done through a government sponsored organising committee.

The UK Government will support industry in dealing with major event organising committees.

Offender management

The UK offender management capability is based on the principles of holding prisoners securely, reducing the risk of prisoners re-offending and providing safe and well-ordered establishments and solutions in which we treat those convicted of offences humanely, decently and lawfully.

The custody estate in the UK consists of adult prisons, young offenders institutions and secure training centres. The majority of these are run by the Prison Service but the UK also has significant experience in terms of privately run prisons and detention centres.

Community sentencing has been used widely in the UK and offender monitoring systems, managed by private security companies (reporting breaches to police) are well established.

Capabilities that could be provided from the UK include:

Design and support on the construction of secure and safe facilities

Contracting, procurement and competition support

Prisoner proof cell equipment and furniture

Safe cell structures

Justice assistance

Policy advice and support

Full prison facility management

Secure transportation of prisoners (vehicles and services)

Secure fencing, CCTV, access control (including biometrics)

Prisoner and staff tracking (includes staff safety systems, and terrestrial and space-based capabilities)

Offender rehabilitation schemes (workshops/skills retraining)

Accredited intervention programmes

Workshop activities and prison industries

Youth intervention schemes and policies

Fire fighting, alarm and safety equipment

Personal protection and restraint equipment

Jamming of illicit real time communications equipment (including cellular and satellite phones)

Search equipment (drugs/firearms/phones)

Surveillance and supervision of persons serving community sentences

Monitoring and rehabilitation of registered sex offenders

Community sentencing options

Electronic monitoring systems and delivery

Accredited youth and adult intervention programmes

ICT

Case management and tracking systems (CATS)

Assessment systems

Prisoner and intelligence databases

Learning and development for senior management and frontline staff



Border security



Many countries face significant challenges to secure vulnerable borders, often in unpopulated and difficult terrain where the deployment of standard solutions would be impracticable.

Enhanced border security is fundamental to the fight against terrorism, human trafficking, control of the illicit drug trade and regional security.

UK solutions include:

Unmanned aerial vehicles (UAVs)

Command and control

Communications

Ground and maritime radars

Sensors

Search equipment (people, cargo and baggage)

Explosive and chemical detection

Hostile vehicle and vessel mitigation

Lighting

Perimeter and access control

Secure documents and readers

Biometrics

Screening

Surveillance from land, sea, air or space

Aviation security design

Training

Threat assessment models and risk mitigation

Services – consultancy and training



‘Services’ includes those activities provided by UK companies including, but not limited to, the following:

Consultancy

Training

Risk Analysis

Guarding/Close protection

The UK has a strong reputation in this field, drawing on many years of operational experience. This is something we are keen to capitalise on. Many Government departments maintain centres of excellence, these include the Emergency Planning College, College of Policing (including the International Academy), City of London Police Fraud and Economic Crime Academy, Fire Service College, Defence Academy and Prison Service College, all of which have significant international credibility.

As well as generating business in their own right, companies specialising in this field can also promote further business for other UK companies. This might be through identifying capability gaps which can be filled using UK

equipment; through training in support of equipment sales; or by the physical protection of corporate resources.

The target customers for providers of services are diverse, spanning both public and private sector organisations. The provision of services is a crucial element of business running through all aspects of the security sector and across many other sectors, including transport, construction, energy and ICT.

Private Security Companies (PSCs) employ a large number of ex-military or police staff to provide security services in what are often hostile and complex environments; including providing advice to the international shipping industry to mitigate attacks from piracy. The UK Government has been a driving force in moves to improve global standards in this industry, and has been actively supported by UK companies operating in this area through the Security in Complex Environments Group within the ADS trade association.

Summary

Our intention is to develop specific export guides for these capability areas. The capability areas will be reviewed annually to take account of developments such as UKTI DSO’s new work on disaster relief which is seeking to capitalise on the synergies between defence and security capabilities and the response required in the aftermath of natural or man made disasters.

Annex B:

UKTI services

UKTI employs approximately 2,300 staff, of whom over 1,200 are overseas. We operate in over 150 locations. Staff overseas are based in British Embassies and other diplomatic offices around the world. UKTI offers the following services to industry:

- **Passport to Export:** This programme provides support and mentoring for eligible SMEs. Aimed at new and inexperienced exporters it offers free capability assessments, support in visiting markets, mentoring from a local professional, action plans, customised and subsidised training.
- **Gateway to Global Growth:** A free service for experienced exporters that offers a 12-month programme of strategic support tailored to your company's needs, to help you diversify into new markets or build additional capacity.
- **Regional Expert:** International Trade Teams and Sector Specialists are located in every region of the country and can provide support tailored to your company's particular needs and growth stage. A list of international trade advisors can be found on the UKTI website.
- **Export Communications Review:** Offers companies help with the linguistic and cultural aspects of doing business overseas, including cultural awareness reviews and communications planning.
- **Export Marketing Research Scheme:** Assists UK companies to carry out export marketing research on all the major aspects of any export venture such as market size and segmentation, regulation and legislation, customer needs, usage and attitudes, distribution channels, trends and competitor activity, strategy and performance.
- **Overseas Market Introduction Service (OMIS):** This chargeable service enables UK companies to grow business globally through the provision of bespoke market research and in-market assistance. Delivered by UKTI staff in British Embassies, High Commissions and Consulates across the world, it can include market advice, support during overseas visits, arranging meetings with key contacts, analysis of market entry strategies, bespoke events such as product launches and identification of potential business partners.
- **Events:** Assistance with arranging groups of UK companies to attend tradeshows, events and missions worldwide. UKTI inward missions bring together UK companies and overseas buyers at events across the UK. Sector-based outward missions give UK companies the opportunity to visit overseas markets and meet buyers as part of a like-minded group. View the events search page on the UKTI website.
- **Business Opportunities Alerts:** A free online service providing export sales leads, sent direct to you via UKTI's global contacts network. Sourced by UKTI staff in British Embassies around the world. Some 400 business opportunities are posted each month on the UKTI website, across all sectors and in over 100 markets.
- **Sector Briefings:** Located on all UKTI website export sector pages, and focusing on sectors and markets where UKTI has identified real potential for UK business, these provide you with the information you need to kick-start your export strategy.
- **Foreign and Commonwealth Office (FCO) Political and Economic Reports:** A free service which provides authoritative, clear and frequently updated assessments of political and economic factors in key emerging markets that could influence UK businesses in the country or region. The reports are written by experienced professionals in the overseas network of the FCO.
- **Overseas Security Information for Business (OSIB):** OSIB is a free service run jointly by UKTI and the FCO. It provides UK companies with accessible and topical information on countries, and the key issues related to the political, economic and business security environments. Overseas Business Risk (OBR) service provides declassified strategic information and incorporates FCO political and economic updates for selected markets.
- **Exports Credits Guarantee Department (ECGD) (UK Export Finance):** UKTI works closely with ECGD the UK Government export credit agency. ECGD works with UK companies, banks and overseas buyers to provide guarantees of finance and insurance against loss in support of UK exports. www.ecgd.gov.uk

For further information go to
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UK Trade & Investment is the Government Department that helps UK-based companies succeed in the global economy. We also help overseas companies bring their high-quality investment to the UK's dynamic economy, acknowledged as Europe's best place from which to succeed in global business.

UK Trade & Investment offers expertise and contacts through its extensive network of specialists in the UK, and in British Embassies and other diplomatic offices around the world. We provide companies with the tools they require to be competitive on the world stage.

UK Trade & Investment is responsible for the delivery of the Solutions for Business product "Helping Your Business Grow Internationally". These "solutions" are available to qualifying businesses, and cover everything from investment and grants through to specialist advice, collaborations and partnerships.

Legal disclaimer

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