

Growth Drivers in Asia Middle East

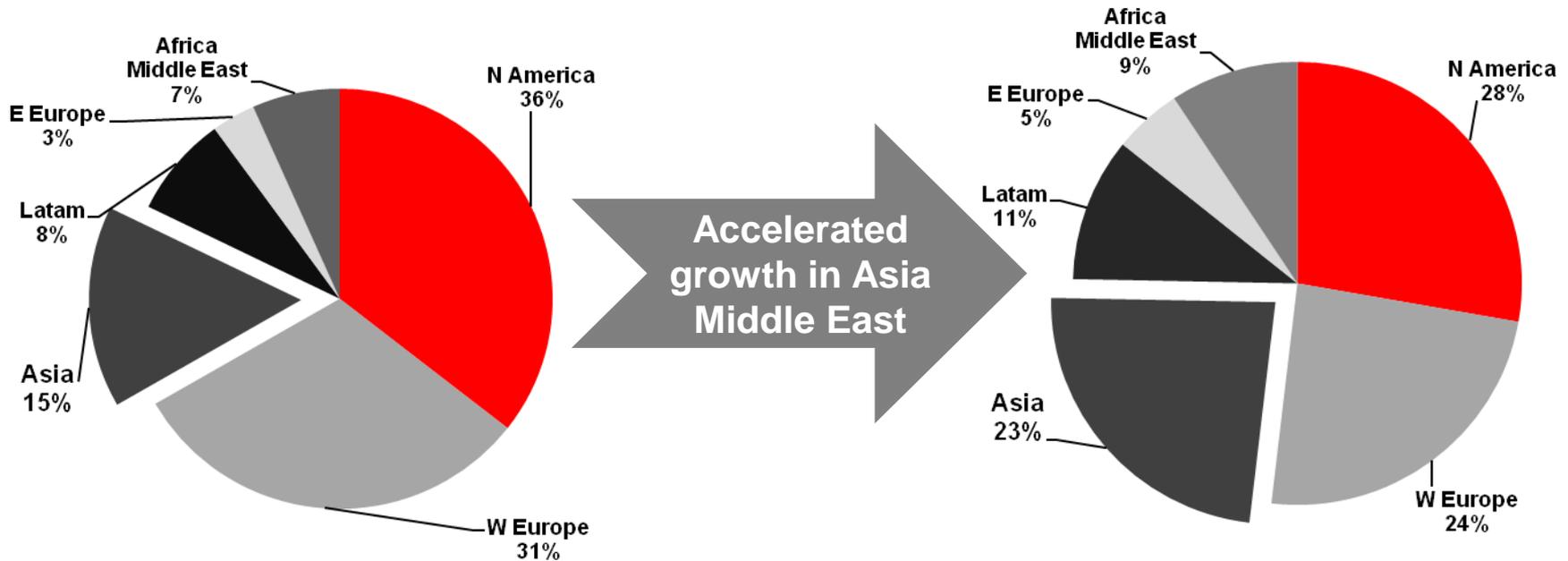
Daniel C. Ryan, Regional CEO Asia Middle East

Asia Middle East Video

Contents

- Organic growth increasing to more than 14%
- Organic growth through geographic expansion, solutions strategy and new growth initiatives
- Middle East: Crises or opportunities?
- India: Manned Security and Facilities Management
- Saudi Arabia: Facilities Management
- China: Organic and acquisition growth

Growth Projection



2004 Market Size : £57bn

2019 Market Size: £155bn

Sources: 2011 Freedonia World Security Services Report; G4S Group estimates

Securing Your World



The Asia Middle East Region

Asia Middle East

Greater China

- China
- Macau
- Hong Kong
- Taiwan

South East Asia

- Brunei
- Indonesia
- Singapore
- Vietnam
- Cambodia
- Malaysia
- Thailand

Pacific Rim

- Australia
- Japan
- New Zealand
- Philippines
- Guam
- Korea
- Papua New Guinea
- Saipan

Inner Gulf

- Djibouti
- Pakistan
- UAE
- Oman
- Qatar
- Yemen

Outer Gulf

- Bahrain
- Jordan
- Lebanon
- Syria
- Egypt
- Kuwait
- Saudi Arabia

South Asia

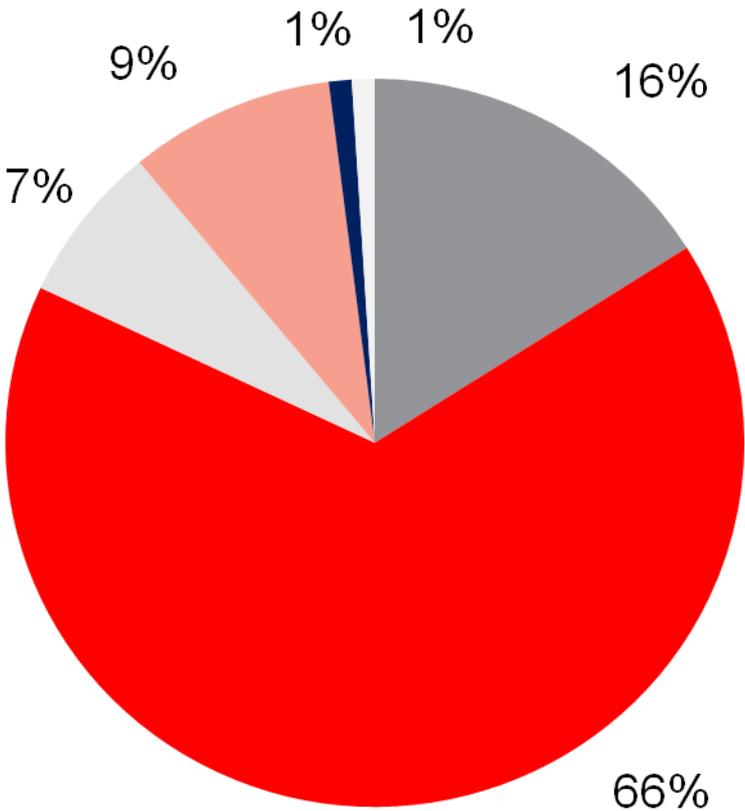
- Bangladesh
- India
- Sri Lanka
- Bhutan
- Nepal



Securing Your World



Solution Mix



2011 Turnover

- Cash Solutions
- Manned Security
- Security Systems
- Care and Justice
- Others
- Consultancy

Growth Opportunities

Organic growth increasing to more than 14% from 2010 to 2013

- India: Manned Security Services, Facilities Management, Cash Solutions
- Saudi Arabia: Facilities Management, Cash Solutions
- Australia & New Zealand: Care & Justice, Manned Security
- China: Acquisition & organic growth (via Facilities Mgt /Security Systems)
- Port anti-piracy: collaborate with UK to capture market



Securing Your World



Competitive position in selected markets

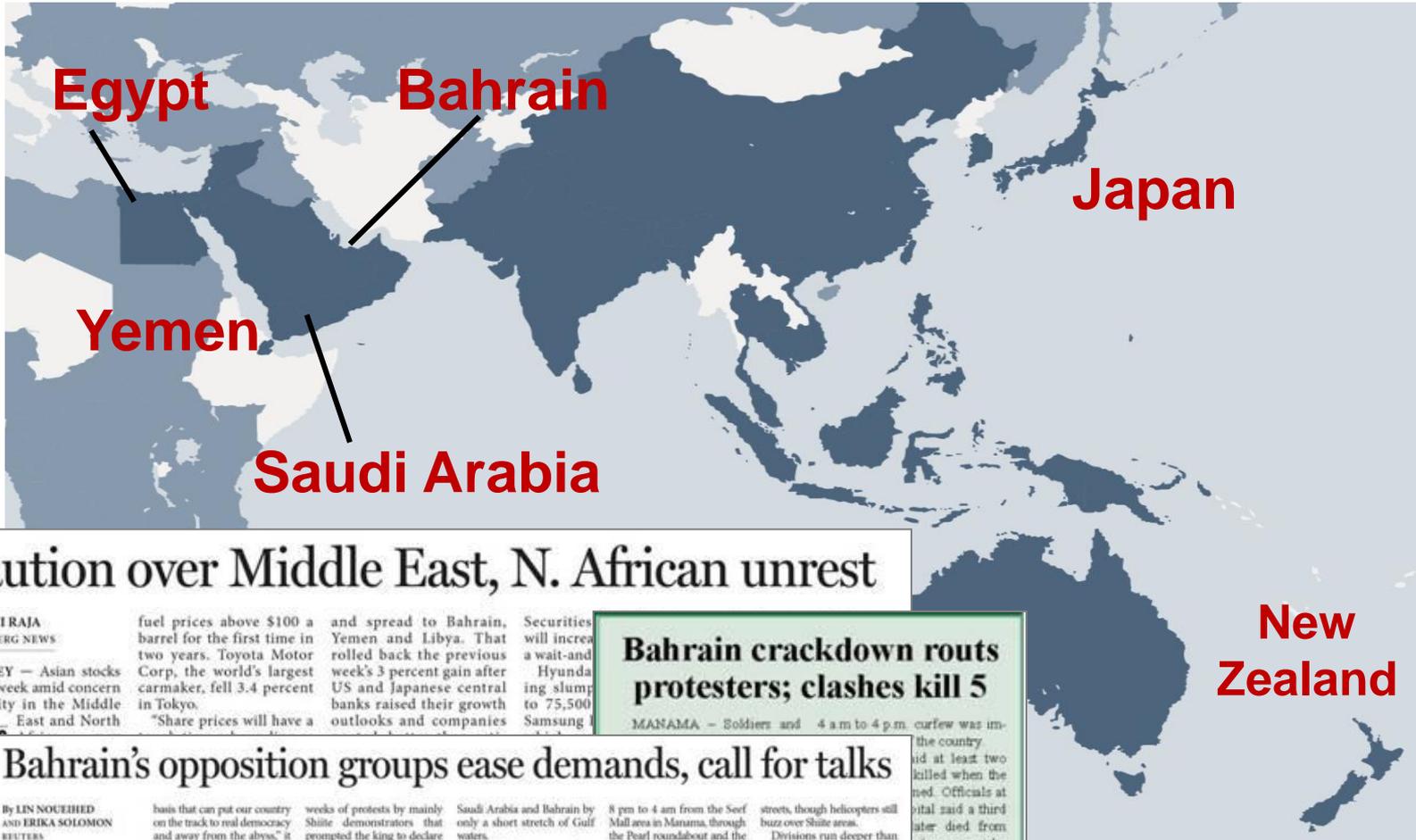
G4S				
		2011-2013 ave revenue growth	Market Share	Position
China		12%	N/A	N/A
	India	Manned Security 16%	Manned Security 16%	Manned Security #1
	Saudi Arabia	15%	Manned Security 3%; Cash Solutions 51%; Security Systems N/A	Manned Security #2; Cash Solutions #1; Security Systems #6

Competitive position in selected markets

	Competitor - Manned Security				
China	Public Security Bureau	Shing Kwong			
India	Tops Group	SIS	Checkmate	Peregrine	
Saudi Arabia	Aminco	Hemayah	AMN & AMAN	Al-Raqiyah	
	Competitor - Security Systems				
China	UTC/CHUBB/Guardforce	Secom	Shing Kwong	Tyco	Public Security Bureau
India	CHUBB alba	Honeywell	Siemens	Tyco	GE & others
Saudi Arabia	Bin Laden Group	Stessa	Saudi Bell	Rajab Al Silsila	Al Bilad
	Competitor - Cash Solutions				
China	Public Security Bureau				
India	Brinks	SIPL	SIS	SDB Cisco	CMS
Saudi Arabia	Aminco	Hemayah			

Source: G4S country information

Crises or opportunities?



Caution over Middle East, N. African unrest

By SHANI RAJA
BLOOMBERG NEWS

SYDNEY — Asian stocks fell last week amid concern over instability in the Middle East and North

fuel prices above \$100 a barrel for the first time in two years. Toyota Motor Corp, the world's largest carmaker, fell 3.4 percent in Tokyo.

"Share prices will have a

and spread to Bahrain, Yemen and Libya. That rolled back the previous week's 3 percent gain after US and Japanese central banks raised their growth outlooks and companies

Securities will increase a wait-and-see Hyundai slump to 75,500 Samsung I

Bahrain crackdown routs protesters; clashes kill 5

MANAMA — Soldiers and 4 a.m. to 4 p.m. curfew was im-

Bahrain's opposition groups ease demands, call for talks

By LIN NOUHEED
AND ERIKA SOLOMON
REUTERS

MANAMA, Bahrain — Main opposition groups in Bahrain have eased their conditions for talks to end a crisis that has drawn in neighboring Gulf armies and raised tensions in the oil-exporting region.

The groups led by Bahrain's largest Shiite Muslim opposition party, Wifaq, in a statement late on Saturday called on security forces to free all those detained and their crackdown

basis that can put our country on the track to real democracy and away from the abyss," it said.

The group retreated from much more ambitious conditions for talks it set last week, including the creation of a new government not dominated by royals and the establishment of a special elected council to redraft Bahrain's constitution.

The new conditions, which also include ending sectarian rhetoric and removing forces who have surrounded a major hospital in recent days, would

weeks of protests by mainly Shiite demonstrators that prompted the king to declare martial law and drew in troops from Bahrain's fellow Sunni-ruled neighbors.

The ferocity of the crackdown, in which troops and police fanned out across Bahrain, imposed a curfew and banned all public gatherings and marches, has stunned Bahrain's majority Shites and angered the region's non-Arab Shiite power, Iran.

More than 60 percent of Bahrainis are Shites. Most are

Saudi Arabia and Bahrain by only a short stretch of Gulf waters.

Shiite Muslim power Iran, which supports Shiite groups in Iraq and Lebanon, complained to the United Nations and asked other neighbors to join it in urging Saudi Arabia to withdraw.

Sunday was the first working day after a week that saw closures of schools and universities to prevent outbreaks of sectarian clashes that had become a virtually daily event. In an effort to bring life back

8 pm to 4 am from the Seef Mall area in Manama, through the Pearl roundabout and the financial district to the diplomatic area.

Bahrain urged employees working in the public sector and both public and private sector schools and universities to return to work after days of closures and shortened hours.

State television also aimed to show viewers the island kingdom had returned to normalcy, airing soap operas, documentaries and montages of ex-citizens' expressive relief

streets, though helicopters still buzz over Shiite areas.

Divisions run deeper than ever after the crackdown, however.

Bahrainis will bury on Sunday the third of the protesters killed in the crackdown this week. The mourners at two funerals earlier this week were defiant, shaking their fists and shouting "down with King Hamad," thousands gathered

at the burial of computer technician Ahmed Abdullah Ahsan in the Shiite suburb of Dikh on Saturday.

the country bid at least two killed when the med. Officials at vital said a third later died from

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ment statement ilities during the policemen who y run over by containing pro- be fringes of the terior Ministry

New Zealand



Egypt

Egyptian labor unrest grows after uprising

By Richard and Tarek el-Tahawy

CAIRO — Egypt's military rulers called for an end to strikes and protests yesterday as thousands of state employees, from ambulance drivers to police and transport workers, demonstrated to demand better pay in a growing wave of labor unrest unleashed by the democracy uprising that ousted Hosni Mubarak's regime.

The statement by the ruling military council that took power from Mubarak appeared to be a final warning to protest organizers in labor and professional unions before the army intervenes and imposes an outright ban on gatherings, strikes and sit-ins.

Soldiers cleared out almost all the remaining demonstrators from Cairo's Tahrir Square, the giant traffic circle that was turned into a protest camp headquarters for the 18-day revolt. During more than two weeks of round-the-clock demonstrations at the square, protesters set up tents, brought in blankets, operated medical clinics and festooned the entire plaza with giant banners demanding removal of the regime.

At the height of the uprising, hundreds of thousands packed the downtown crossroads.

Several huge trucks piled high with protesters' blankets left the square today. All the tents were gone, as were other signs of permanent camps. By early afternoon, a few dozen stalwarts remained, standing in one corner of the square and yelling for the release of political prisoners.

The remaining protesters say they won't leave until all those detained during the revolt are released.

Egypt's ambassador to the United States, Sameh Shoukry, said Mubarak, 82, was "possibly in somewhat of bad health," providing the first word about him since being ousted last Friday.

Speaking yesterday on NBC's "Today" show, the envoy said he had received the information about Mubarak but could not be more specific. Two Cairo newspapers said Mubarak was refusing to take medication, depressed and repeatedly passing out at his residence in the Red Sea resort of Sharm el-Sheikh. There was no immediate confirma-



A man is taken away after he fainted during a scuffle with police in Tahrir Square in Cairo yesterday.

tion of the report.

Mubarak had surgery in Germany last year to remove his gallbladder.

The latest communication by the ruling military council was read on state television by a military spokesman. It said Egypt needed a quieter climate so the military can run the nation's affairs at this "critical stage" and eventually hand over the reins of power to an elected and civilian administration.

The statement also warned that strikes and protests hurt the country's security and economy and gave a chance to what it called "irresponsible parties" to commit "illegal acts." It did not elaborate.

Amid the efforts to build a new system, Egypt's upheaval has splintered into a host of smaller movements, the inevitable outcome of a self-identified citizen feeling free to speak up, most of them for the first time.

Outside the Nile-side TV and state radio building, hundreds of public transportation workers demonstrated to demand better pay. Several hundred protesters from the state Youth and Sports Organization also protested yesterday with similar demands in Tahrir after the military had moved the long-term protesters out.

Across the Nile River in the Giza district, hundreds of ambulance drivers demonstrated, also to demand better pay and permanent jobs. They parked at least 70 ambulances on a roadside along the river, but did not block the main road.

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"These too," decli "It's because pe- taker, a ci demon- must be he

ed outside Antiquite Zamalek, Alaa F



An Egyptian policeman is carried by supporters in Tahrir Square in Cairo on Sunday. Thousands of protesters streamed back into Tahrir Square after the army sought to disperse them from the heart of Cairo when they began to stir on the eve of the anniversary of the 2001 election.

Military rulers dissolve parliament

By Richard and Tarek el-Tahawy

CAIRO — Egypt's new military rulers dissolved parliament yesterday, a move that would give them the power to govern until the next election.

The move was a surprise, as the military council had said it would hold elections in the next few months.

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The Central Bank of Egypt ordered banks across the country to stop accepting a strike by employees of the National Bank, the largest state bank, and several other financial institutions. Today is a national holiday in Egypt to mark the birth of Islam's 7th century Prophet Muhammad. The banks are scheduled to reopen tomorrow.

The stock market, however, will stay closed tomorrow and Thursday, the final weekday in Egypt. A previous announcement had said it would reopen tomorrow, ending a three-week closure that began after the market lost almost 17 percent of

its value in two months, they said. The military also encouraged the youth to consider forming political parties — something very difficult to do under the old system — and pledged to meet with them regularly.

"We felt a sincere desire to protect the gains of the revolution and an unprecedented respect for the right of young Egyptians to express their opinions," Ghannam said. Yesterday, representatives of the youth groups that organized the protests said they wanted Shafiq's government replaced by a cabinet of technocrats and that Mubarak's National

Assembly should be dissolved. Ghannam said the military would help the new government to build a new constitution and to hold elections. He said the military would also help the new government to build a new constitution and to hold elections.

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Action:

- Supported emergency evacuation as required by customers
- Evacuated majority of tourists safely on behalf of the British Foreign Office and key customers

Impact:

- Short term -- gained visibility among government heads of security
- Short term business gains
- Received accolades from important global accounts

What customers are saying

“...special thanks to you and your respective team who worked with me in Etisalat for their ongoing support to make the place secured all the time and I am really proud to work with a company has great supporters like your team specially in the last circumstances ... Thanks a million to your security team.”

**Mohamed Mahmoud, Security & Safety team
Etisalat Misr**

“Thanks to you all for getting this in place so quickly, well done G4S.”

**Gary Ash, Director Security EMEA, APAC & China
Avon Global Security**

Bahrain

Gulf military force enters Bahrain

Military and Royal Guard
MAINTAINING ORDER
 from Saudi Arabia and other nations moved into Bahrain yesterday to shore up the nation's Sunni rulers in the face of escalating Shi'ite-led protests seeking to break the monarchy's hold on power.
 Bahrain's main opposition groups immediately denounced the outside intervention as an "occupation" that pushed the tiny Gulf kingdom dangerously close to a

powerhouse Iran.
 The strike in Bahrain began to and just as the US defense secretary arrived to urge its leaders — key Washington allies — to heed at least some of the demands for change.
 A Saudi security official said the Gulf units dispatched to Bahrain come from a special force within the six-nation Gulf Co-operation Council. He did not give details on the size or national breakdown of the



In image grab taken from Bahrain TV shows "vanquish" of a contingent of Gulf troops arriving in the unrest-wracked Kingdom of Bahrain across a causeway from Saudi Arabia yesterday. —AFP

ad claimed "extremist movement" re-trying to disrupt the country and sub it toward sectarian conflict.

A coalition of seven Shi'ite-led opposition factions pledged to demand a UN investigation into the "ruff leaders' decision to send in the special force for an internal conflict. The unit had been deployed in the past to Kuwait, including during the 1991 UN-led campaign to drive out Saddam Hussein's troops and before the 2003 invasion of Iraq.

"We consider that any military force or military equipment crossing the boundaries of Bahrain — from air, sea or land — an occupation and a conspiracy against the people of Bahrain," said a statement from the opposition groups.

There was no indication yet whether protesters will respond with new marches or tactics.

There also was no immediate comment from Bahrain's monarch, but leaders here expressed increasing frustration that opposition groups have not accepted offers to open dialogue aimed at resolving the crisis.

In a series of Twitter messages, Bahrain's prime minister, Sheik Khalifa bin Salman Al Khalifa, lashed out at the Shi'ite-led protesters. "What we are witnessing in Manama is no peaceful protest," he wrote. "It's wanton, gangster style takeover of people's lives."

Shi'ites, who account for 70 percent of the population, have long complained of systematic discrimination by the Sunni dynasty that has ruled for more than two centuries.

The grievances include allegations of being blackballed from key government and security posts. They also strongly object to government policies that give citizenship and jobs to Sunnis from other Arab countries and South Asia as a way to offset the Shi'ite demographic edge.

The main opposition groups have called for the Sunni rulers to give up most of their powers to the elected parliament. But, as violence has deepened, many protesters now say they want to topple the entire royal family.

—AP



Friends of Momen al-Khatib, 22, who died during clashes between protesters and anti-government protesters and riot police early on Friday, gather during his funeral procession in Sitra village, Bahrain, on Friday.

Mourners call for toppling of monarchy

Brutal attacks in Bahrain inspire fiercer defiance of ruling system

By HADEEL AL-SHALECH ASSOCIATED PRESS
MANAMA, Bahrain — Thousands of funeral mourners called for the downfall of Bahrain's ruling monarchy as burials began on Friday after a deadly assault on pro-reform protesters that has brought army tanks into the streets of

more than 200,000 and put the nation under emergency-style footing with military forces in key areas and checkpoints on main roadways.
 "The regime has broken something inside of me... All of these people gathered today have had something broken in them," said Ahmed Khalifa Abu Taki, whose 27-year-old brother Mahmood was killed in the crackdown sweep through the protest camp in Manama Park Square. "We need to demand for the prime minister to step down, the entire ruling system after

Action:

- Supported emergency evacuation as required by customers
- Evacuated employees of multi-national corporations

Impact:

- Short term - gained visibility at board level of multi-national corporations and government heads of security; and built brand
- Short term increase in Manned Security business
- Employee retention

What customers are saying

“From instant confirmation of engagement and regular comms on deployment, contact, collection and safe delivery of Salman and his family to the airport – a very good service.”

**Jeremy Nelson, Head of Security Continuity
KPMG LLP**

“...We acknowledge the kind of extraordinary support that you have extended to us at a time a great discomfort in moving our funds to our local bank accounts. We remember not a single word of dismal was heard from your side ...that too even in the middle of an insurgency... It tell us your sincere commitments and makes us feel confident to continue the warm past... Unstinted admiration to you and your vibrant team members for extending impeccable service standards.”

**Mohamed Isham, Head Operations - Bahrain
UAE Exchange Centre Co Bahrain WLL**

Saudi Arabia

State Sponsor of Terrorism: Saudi Arabia and other Gulf

Saudi Money Floods Afghanistan Via Waziristan

Posted by Ryan Mauro On June 2, 2010 [ADD COMMENTS](#)

Don't read this if you want to stick to the comforting line that the Saudis are fully-engaged in the war against radical Islam. Afghan intelligence has found that over 920 million British pounds worth of Saudi money, which is over \$1.3 billion, has entered their country over the past four years. But those are just business transactions and investments, right?

Saudis protest outside Interior Ministry

DOHA — More than 200 Saudis were allowed to protest outside the Interior Ministry yesterday to demand the release of detainees in the largest demonstration in the capital since the regional outbreak of pro-democracy unrest.

Saudi authorities ban demonstrations and are increasingly determined to prevent the unrest, particularly Sh'ite protests in neighboring Bahrain, from spreading to the oil-rich Kingdom.

A massive show of force snuffed out a Facebook-based effort to stage unprecedented pro-democracy protests in Riyadh on Friday. But in heavily Sh'ite eastern Saudi Arabia, hundreds of protesters marched in at

least four different locations, calling for the release of political prisoners and demanding reform. Saudi police opened fire to disperse one of the protests, wounding at least one man.

The protesters yesterday demanded information on the fate of mostly Sunni detainees held on security and terrorism-related charges, and their immediate release.

"My brother is 18, he has been in detention for four years and until now we don't know anything about his fate or even the charges against him," said Ahmed Ali, one of the protesters.

Another said his 70-year-old father suffers from cancer of the colon and has been in detention for 10 years

without receiving medical attention or a trial. He spoke on condition of anonymity for fear of retribution.

The protesters asked to meet with the interior minister, Prince Nayef, but their request was turned down and they were not allowed to go inside the building.

Eyewitnesses said cameras were set up above the Interior Ministry building to film the sit-in, which some of the protesters said was to intimidate the protesters and possibly arrest them in the next days.

Activists have set up Facebook groups calling for protests in Riyadh and one group garnered more than 30,000 supporters of its demands for free elections. — AP

Stable for now

Impact:

- Royal decree commanded two-month bonus to all local employees; £4m
- Pass on rate increase to customers

Unknowns and uncertainties...

Egypt: No one knows where the recent change in government will lead?
Republic or military dictatorship?

Saudi Arabia, Qatar, UAE & Bahrain: Saudi Arabia troops in Bahrain turned political disputes into intensified confrontation between Shias and Sunni

The geopolitical unrest and continued political upheaval will weaken law & order and increase crime

→ Opportunities for short term gain in security services

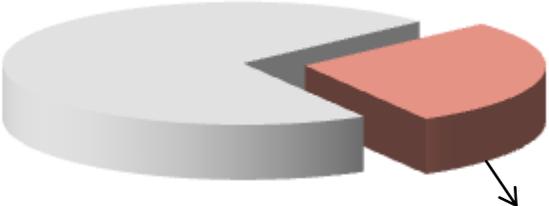
→ We believe stable government provides us long term revenue

India Manned Security Market

TOTAL MARKET SIZE

£3.8 billion

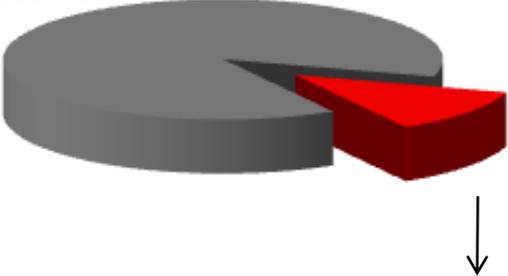
UNORGANISED
SECTOR –£ 2.7 billion



ORGANISED
SECTOR – £1.1 billion
(approx. 30% Market share)

MARKET SHARE OF G4S IN THE ORGANISED SECTOR

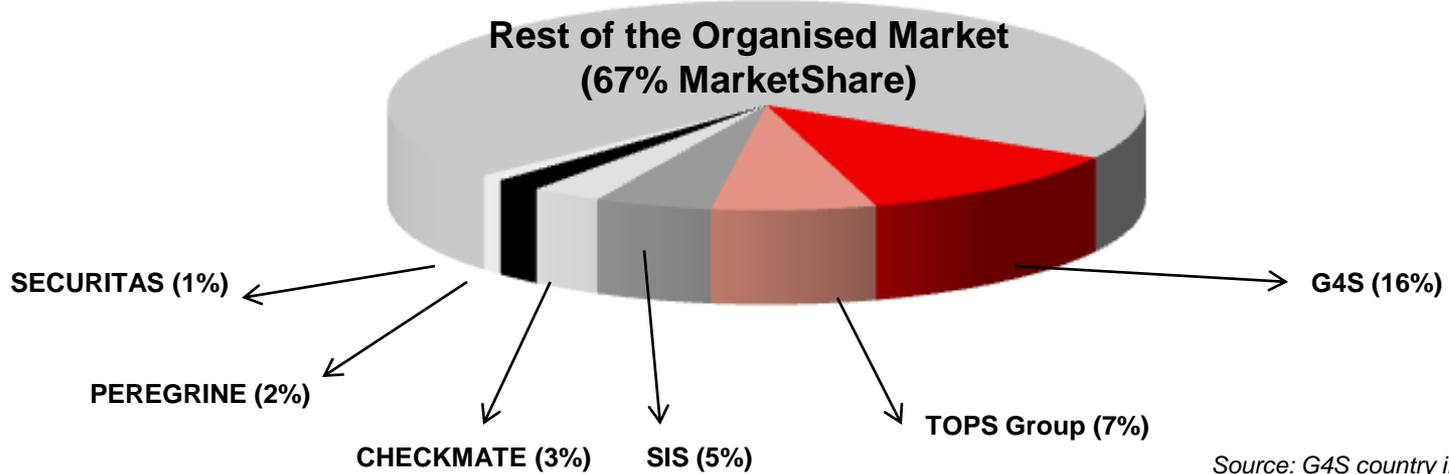
REST OF THE
COMPETITION : 84%



G4S MARKET SHARE:16%

Source: G4S country information

India Manned Security Market



Competitor	Market Share	Presence in India	Guard force number
G4S	16%	PAN INDIA	143,000
Tops Group	7%	80 Cities	85,000
SIS	5%	88 Cities	45,000
Checkmate	3%	60 Cities	40,000
Peregrine	2%	53 Cities	18,500

Saudi Arabia Facility Management

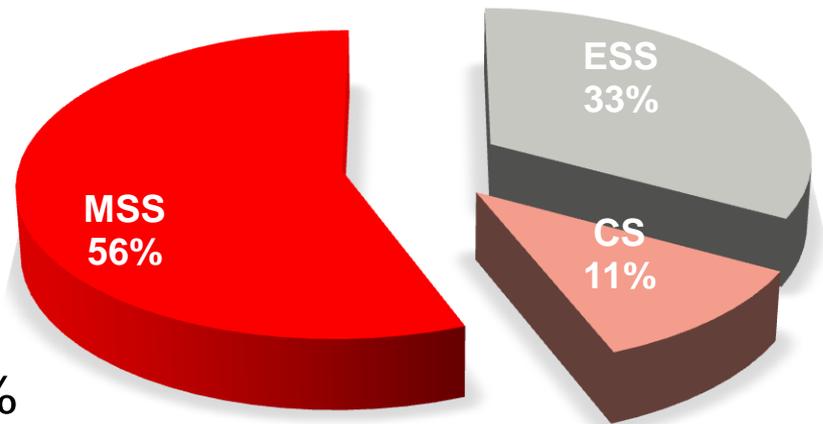
- Facility Management (FM) and Services contribute significantly to the total revenue
- Government intends to spend over £60bn (\$100bn) on infrastructure, giving rise to significant opportunities in FM
- G4S ranks 6th in the FM market

	Competitor - Facility Management & Services				
Saudi Arabia	Bin Laden Group	Saudi Oger	Zahran	Tamimi	Al-Khaleej

Source: G4S country information

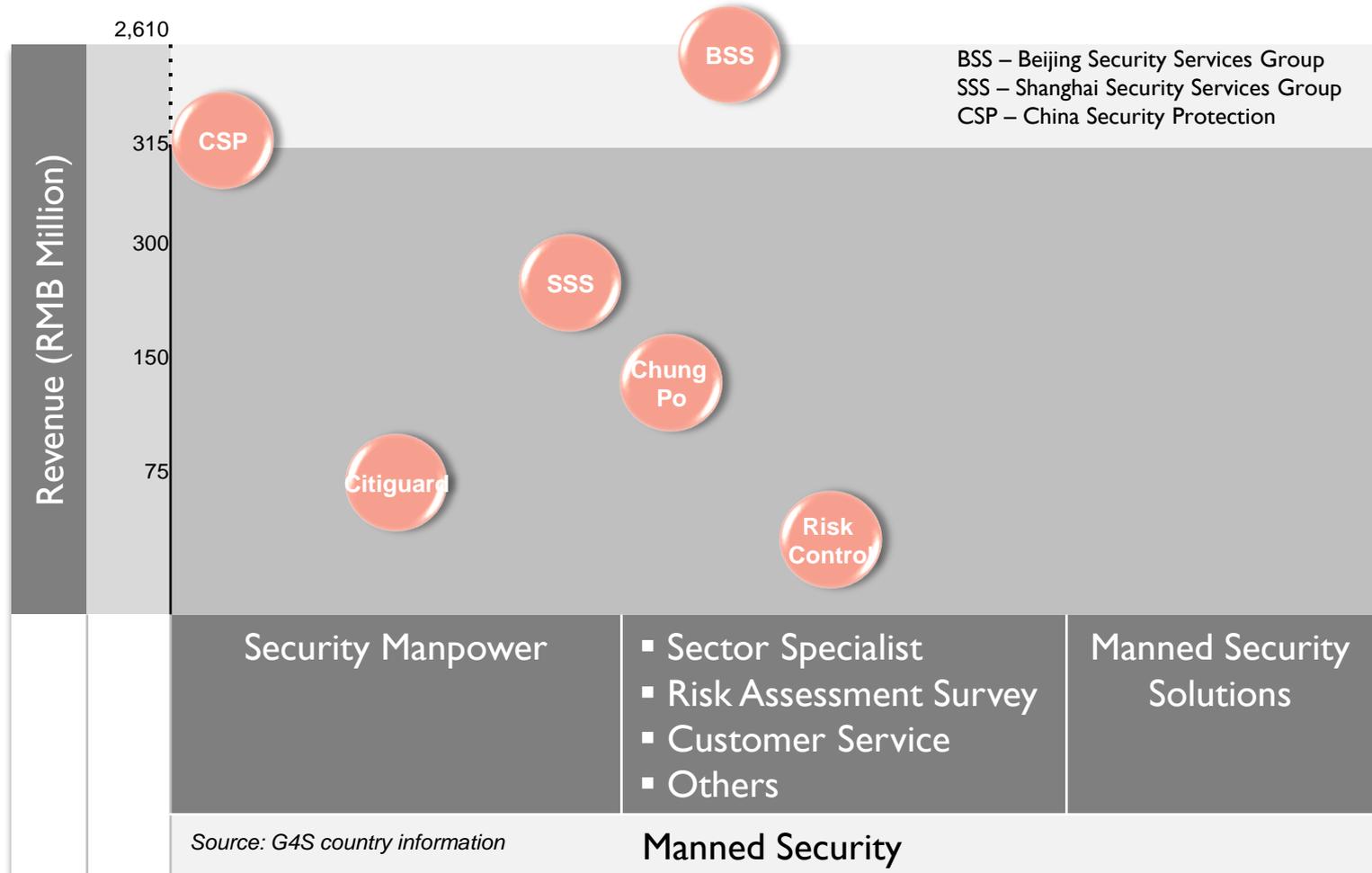
China

- Market Size : £22.9bn
- Employees : 6 million (2.5 million licensed)
- Forecast Growth
 - Manned security (MSS):10%
 - Cash solutions (CS): 10%
 - Electronic security (ESS):16%
- 49 cities with population over 5 million

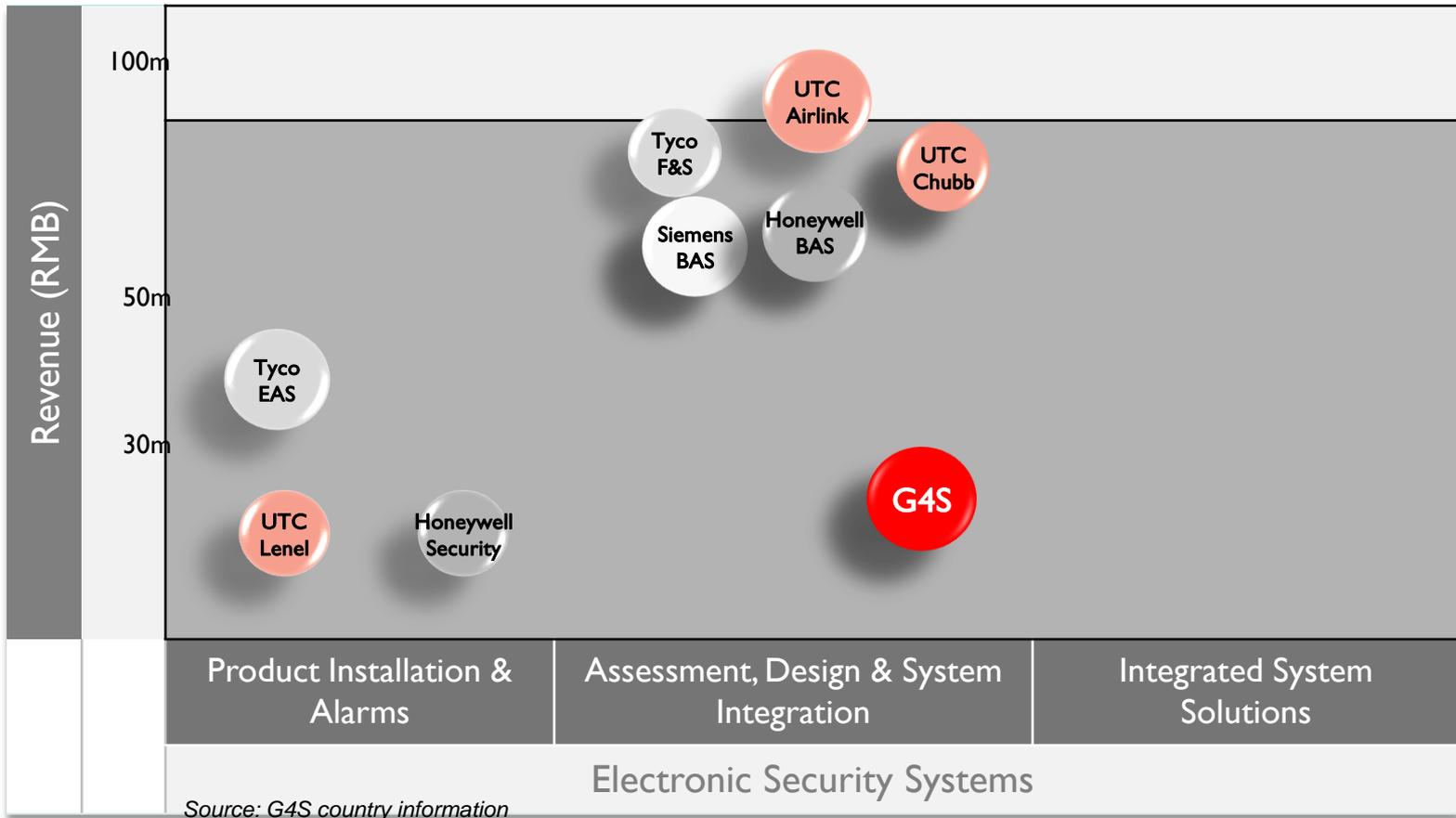


Source: G4S country information

China Manned Security Market



China Electronic Security Market



Summary

- Expect double digit organic growth
- Acquisition opportunities in Manned Security, Security Systems and Facility Management
- Underpin our current businesses with consistent HR, operational delivery, and account management practices