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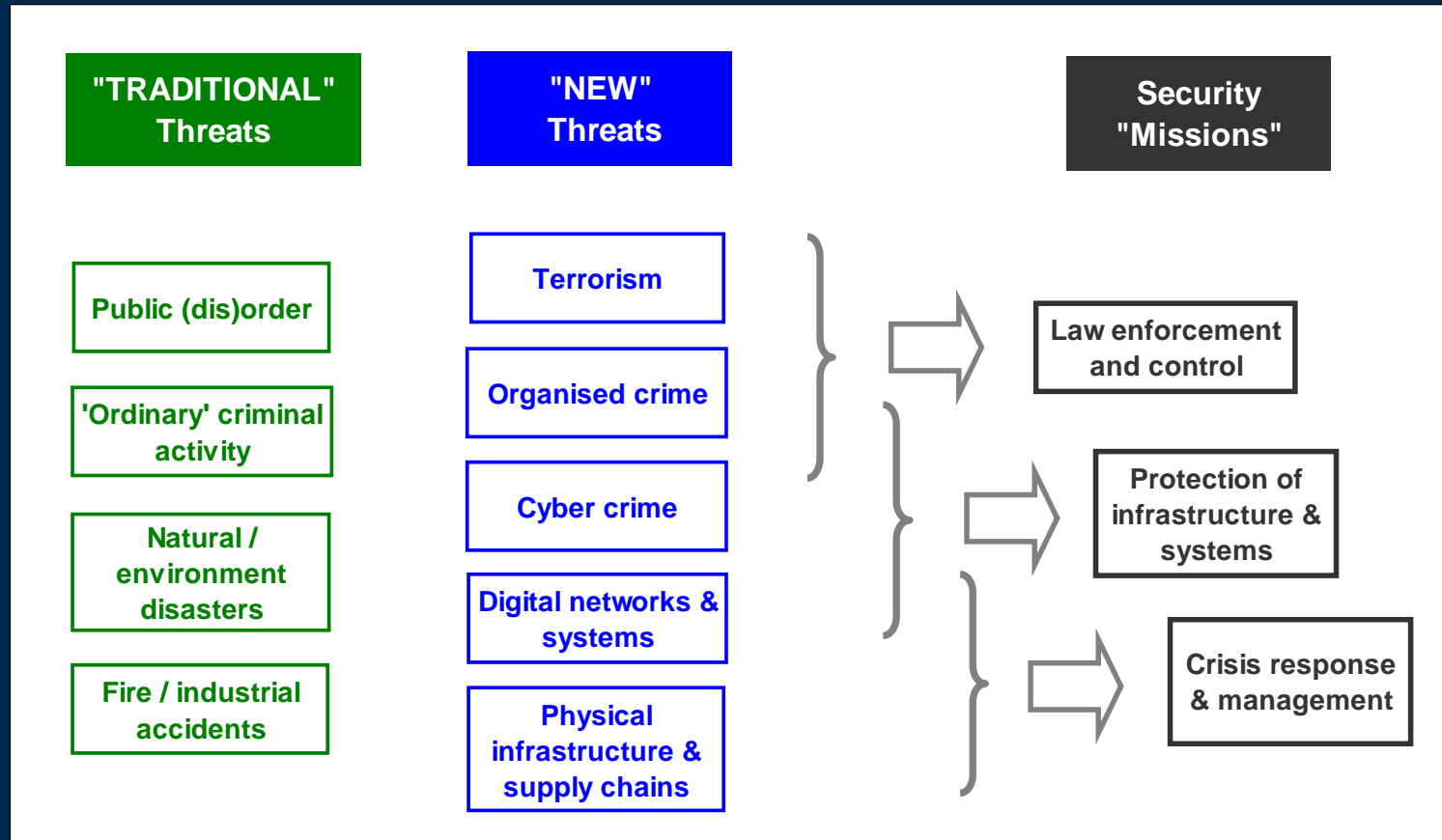


Security market overview: evidence from a study on the competitiveness of the EU security industry

Paul Baker

Session: “Instruments and initiatives for innovation in security R&D”
Fourth European Security Research Conference
Stockholm, September 29-30 2009

A changing landscape of security threats, perceptions, priorities, and missions ...



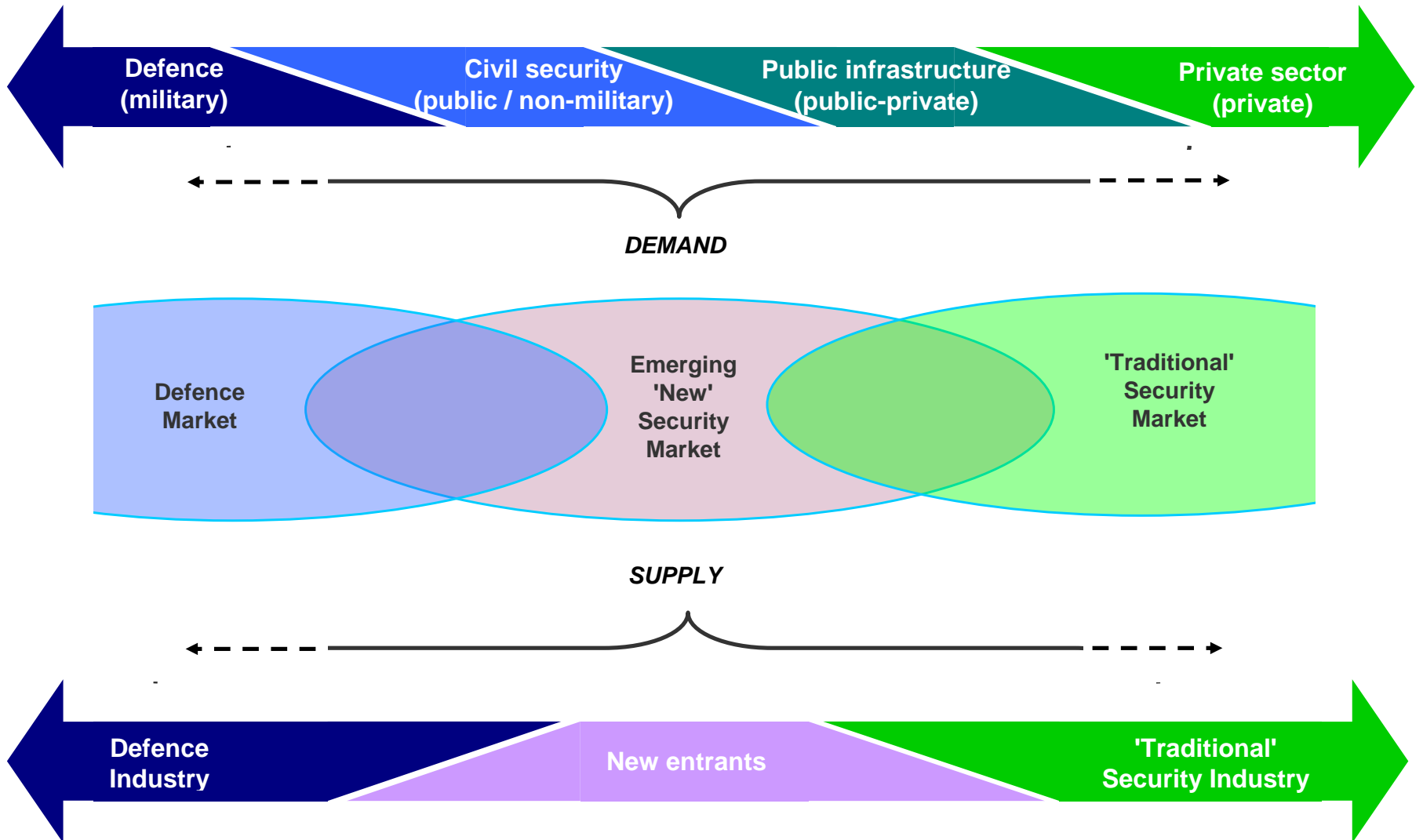
An unclear definition of security boundaries and allocation of responsibilities ...

- ‘External’ *versus* ‘internal’ security
- ‘Civil’ *versus* ‘private’ security
- ...
- Typology of security demand segments:
 - Defence (military) support for internal security
 - Civil (non-military) public security administrations
 - Mixed public-private sectors
 - Private sector (high vulnerability)
 - Private sector (low vulnerability)

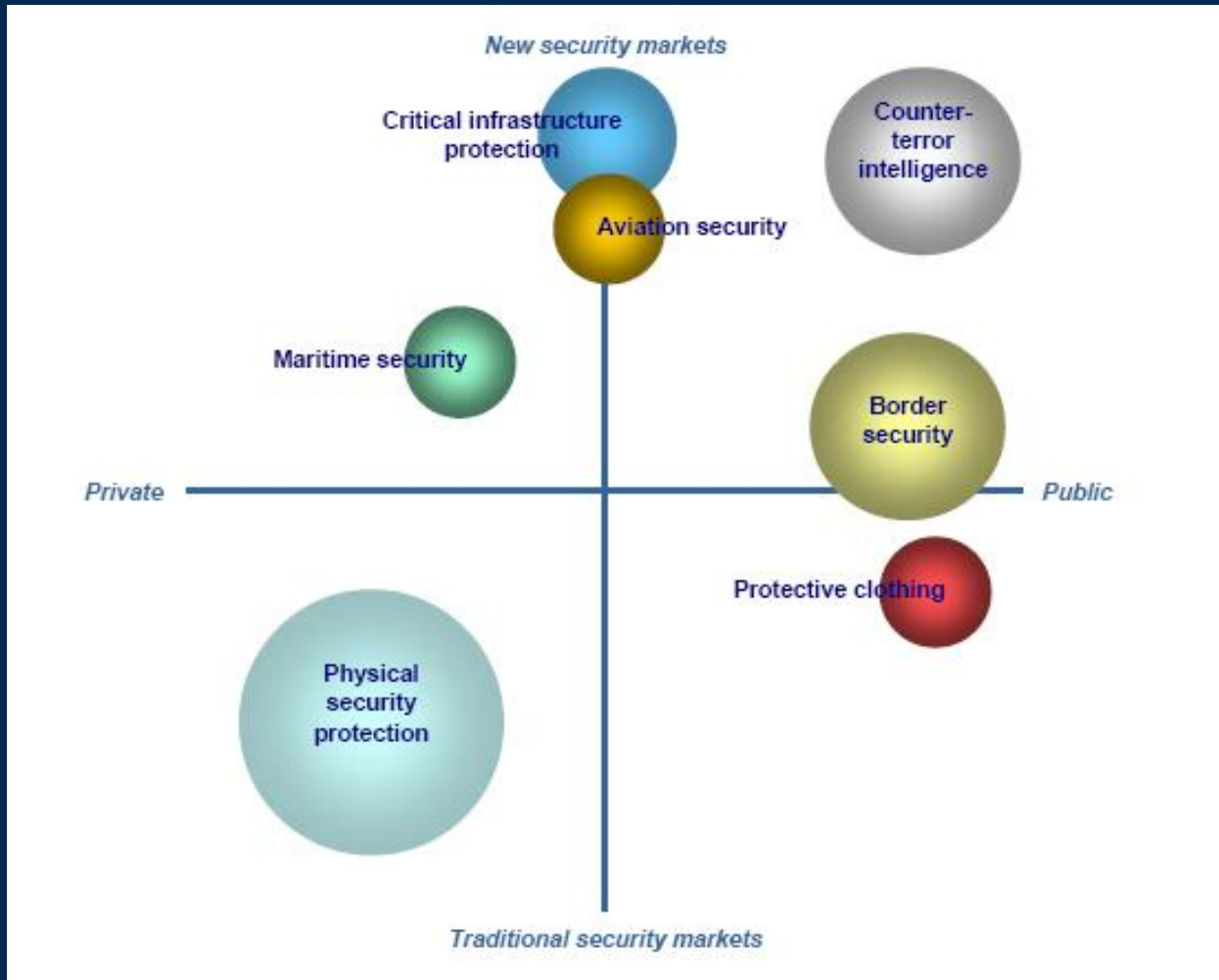
An evolving structure and organisation of the security industry ...

- Traditional security industry: mature technologies for general security requirements
- Security-orientated defence industry: defence technologies *plus* acquisition/conversion of civilian technologies applied to security
- New entrants:
 - Outsiders: extension/adaptation of non-security technologies to security.
 - Start-ups: development and commercialisation of (new) security technologies

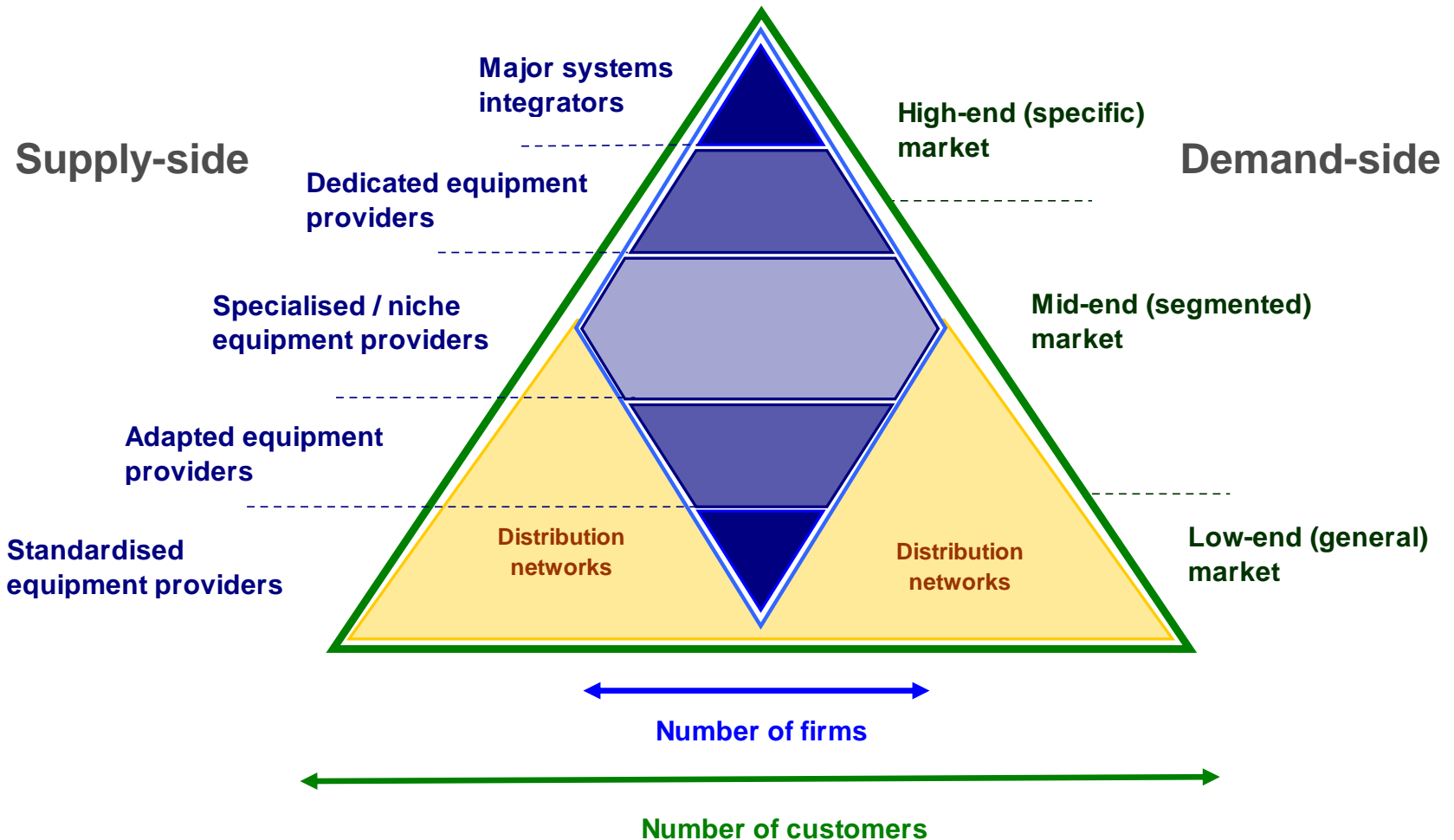
... the emerging "new" security market



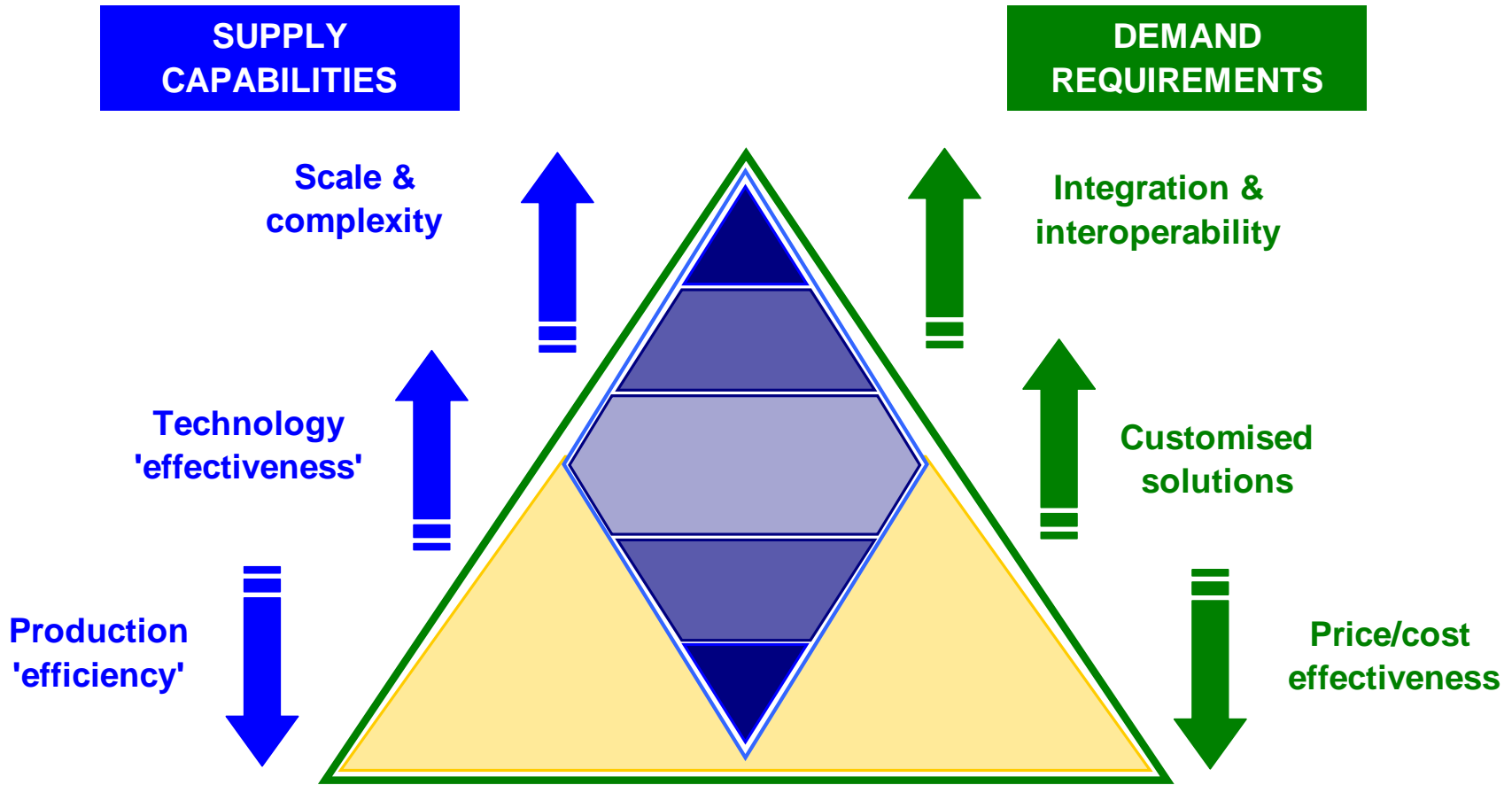
... with a market value of €26 - €36 billion (?)



Supply and demand segmentation ...



... production capability requirements and innovation possibilities



Factors shaping the structure of demand requirements

- Adoption of integrated approaches to security
- Enhanced interoperability requirements
- Increased automation
- Managing/reducing the 'intrusiveness' of security
- Emphasis on 'soft' elements of security systems

Factors constraining security markets and innovation

- Demand-side and supply-side ‘lack of awareness’
 - Demand-side and supply-side ‘fragmentation’
 - Demand-side and supply-side ‘concentration’
-
- Vision & policy, dialogue, education, ...
 - Standards, certification, procurement, ...
 - Procurement, ‘transitioning’, value-chain organisation, ...

THANK YOU

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