



## THE NEW SECURITY COMPANY: integration of services and technology responding to changes in customer demand, demography and technology



Fifth White Paper - Berlin, 23 April 2015

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## Introduction

“Security is the foundation of our free model of society. Our political, personal and economic freedom is currently under attack from all sides, as the recent developments throughout the world sadly and all too painfully keep reminding us.

The security industry, in cooperation with national security authorities, has come to play a crucial role in the joint task of ensuring the protection of citizens and businesses. Our common goal must be to safeguard the security and the freedom of Europe’s citizens as effectively as possible.

For example, private security firms at airports are now responsible for what used to be sovereign tasks and have thus become a central pillar of our security architecture. This places an extremely high degree of responsibility on each individual company and their staff. For this very reason we have to impose high standards when selecting and training security personnel. Quality standards must be defined and compliance with them monitored. That is the only way in which we can reliably guarantee the security of our citizens. At the same time, it forms the basis for the economic success of private security enterprises.

In all this it is vital to coordinate regulations across national borders so that all the citizens of the European Union can enjoy the highest possible level of security and with it, freedom. At the moment most measures designed to protect business have a national focus. Yet many security threats are increasingly assuming global dimensions. It is therefore crucial that we within Europe share our experiences – both good and bad – as well as the steps we are taking to protect the business sector.

As mediators between business, politics and authorities, associations in all countries have a central role to play. For this reason I welcome the fact that the national security industry associations are engaging in intensive dialogue with their European partners and have been organising joint events for many years now. The continued interest in these events testifies to the success of this concept. I regard this as an important factor in actively fostering European security cooperation. In this way we can join forces to confront the challenges facing freedom and prosperity in Europe.”

Marc Pissens  
CoESS President



## Securing the Future

As I write the foreword for the 5<sup>th</sup> CoESS White Paper, themed “The New Security Company”, I would like to reflect on the context in which this theme is being placed, and what CoESS can offer its members in this important transition.

Today’s environment is particularly complex economically, technologically and in terms of nature and sources of risk. As much as the economic situation is referred to as “the New Normal”, in many ways the security context has also reached a “new normal”. This means that we are dealing with new factors of risk, which are wide-ranging, including white-collar criminality as well as particularly violent attacks, cyber-criminality, organized crime to finance ideologies, industrial espionage and many more.

This requires us to respond in a different and more sophisticated way, moving away from a classic antagonism of “service vs technology”, towards a new paradigm where these are merged into a full solution.

Whether we like it or not, society is changing, our clients’ demands are changing, and so are the demographic factors.

Our objective and mission at CoESS is to make sure that the conditions are in place for this transition to take place smoothly for our members who wish to operate as “new security companies”.

To this end, CoESS actively works at European level to create right conditions for our members to be able to deliver this high quality service:

- by creating industry standards as well as the right legislative environment;
- by improving the qualification and motivation of our staff through training and working conditions.

For 25 years, this has been the foundation of CoESS.

Service is ever more important when delivering integrated solutions involving complex and sophisticated technology. Qualification is therefore crucial, and the new technology environment can help create more attraction to recruit and retain qualified and motivated staff within our industry.

It is the mission of CoESS to continue to promote these important values vis-à-vis its Members, the Authorities and Society at large and support our Industry in its evolution towards a new paradigm.

In closing, I would like to stress that by “integrated security solutions”, we don’t mean merely adding technologies to security. What we mean is reaching a result that is superior to the sum of its parts, by fully integrating the security objectives within the companies’ goals and operations, ensuring a smooth complementarity of people and technologies to offer high quality service, ultimately achieving a security solution supporting the economic performance of our clients.



## Preamble

“Challenges for the private security industry” is the motto of the 5th European Summit which the CoESS (Confederation of European Security Services) and the BDSW (Association of German Private Security Industry) are holding jointly in Berlin on 23 April 2015.

I am glad that after the conferences in Paris, Stockholm, Brussels and Madrid we are able to hold this event. Experts from the fields of politics, parliament, police and the private security industry will be reporting on and discussing the most pressing challenges.

Nearly sixteen years have passed since the CoESS and the representatives of its member companies met for the first time as our guests in our capital. Only a decade after the fall of the Wall we were able to present the “Best Value Manual” to the representatives of the entire European security industry. With this manual we had created an important foundation for a system of awarding contracts for security services on the basis of quality. Only a few days before this year’s European Summit the new revised edition was completed. Once again this edition was jointly prepared with the support of the European Commission and the European trade unions.

Now we find ourselves facing new challenges which are the focus of this conference in Berlin. The customer requirements for our services are constantly changing to keep up with the threats they face. Security is becoming more and more complex. The relentless pace of technological change makes no exception for the security industry. An integrated security service is becoming more and more important. The demographic change also poses significant challenges for employers.

We are facing these challenges. The training of our staff must be further improved. This is the only way of combining security services with increasingly sophisticated security technology.

“Panta rhei” – Everything flows. This piece of wisdom from Classical Greek Philosophy also applies to this day and age. The only thing that never changes is change itself: in society, politics and economics. Demographic change, the digitalization of our everyday life and the workplace, the complete interconnectedness of the “industry 4.0”: these are the megatrends in the economy and society. For the security industry there is no way round these changes either. We have to adapt to this paradigm shift.

I am convinced that the 5<sup>th</sup> European Summit will be an important stimulus for our participants from abroad and Germany, the responsible authorities and experts of the private and public sectors. In Germany we are already a recognized part of the security architecture. This also applies to Europe. Security is no longer imaginable without the massive capacity of the security industry with its 2.2 million employees organized in 60,000 companies. This will become clear once again in Berlin.

I am looking forward to the 5<sup>th</sup> European Summit in Berlin and wish all participants an interesting time and fruitful talks. I also hope that you will find the time to gather some impressions of the German capital during your stay here.

Welcome to Berlin!





" The traditional guarding market,  
launched as a business in the beginning  
of the previous century, has been  
growing faster than GDP in most  
European countries. "

# Drivers and challenges of an integrated guarding and technology security approach

## An industry in transformation

The security industry is currently in some segments undergoing a gradual and unprecedented paradigm shift.

The traditional guarding market, launched as a business in the beginning of the previous century, has been growing faster than GDP in most European countries. It has recently come in mode of transformation, faster in speed and bigger in impact than it has ever seen.

The main activity of the private security industry has been and still is “static guarding”. However, the current market dynamics call for an accelerated integration of traditional on-site guarding with remote and mobile guarding, supported by technological and electronic solutions. These technological products develop at phenomenal speed thanks to the convergence of different applications such as CCTV and access control, and this is likely to grow even more with the next generation of almost completely IT-centric systems. One might wonder if in this scintillating evolution, hardware is not rather becoming the commodity and software the differentiating success factor. Furthermore, the current and future role of the static or mobile guard is constantly changing in this permanently renewing equation.

These tendencies will undoubtedly go on dominating the future of the security business. Therefore many new challenges have to be faced by companies in order to be successful in the coming years.



## Multi-sourcing or bundling

A phenomenon that is penetrating the security industry since some time is the marketing approach of “bundling”, whereby services and products are combined into a single package.

Since decades it has been proclaimed by many as the new revolutionary market approach that would replace the silo sales of guarding, alarm monitoring or electronic security.

However, on a larger scale the combined sales approach did not convince enough to really break through until a couple of years ago. So, not surprisingly, today many customers continue to decide separately, in a best of breed strategy, on their purchase of manned services and electronic security systems. And they do this for different reasons.



Customers may be reticent to buy bundled service arrangements, because they may perceive, rightly or not, that they no longer are in control. They may also feel that going with one supplier is more risky. A decentralized decision-making process and/or barriers between different specialized departments (guarding within facility and electronic security within IT for example) are further reasons for multi-sourcing purchasing processes. A division of decision power based on strong internal control and internal high quality knowledge level in each security segment often result in guard forces voluntarily not being purchased in combination with technology. Or a customer might have had a negative experience with an integrated security contract because the supplier was simply not having the maturity and/or the capabilities for delivering the promised professional solutions.



Even though there will be organisations and institutions that will probably never entirely embrace the bundling of guarding and electronic security, strong positive evolution towards further development of this combined approach is however visible. This trend is most probably irreversible, at least in Europe and possibly on a worldwide basis, and is supported by a multitude of factors.

Firstly, there are overall economic and operational considerations.

Theoretically speaking, bundled outsourcing should reduce duplication of management attention or layers. It must standardize and simplify operations and processes. More so, it should expedite the procurement and contracting process, and further on mitigate risk through limited points of contact, and simplify the entire management process. Bundling is also expected to offer cost savings and financial flexibility.

Why then is a combined guarding and electronics sale not a “no-brainer”?

“Even though there will be organisations and institutions that will probably never entirely embrace the bundling of guarding and electronic security, strong positive evolution towards further development of this combined approach is however visible.”

## Drivers determining success or failure of the combined security approach

Logically, bundling should bring added value to both the supplier and the customer. But a great deal really depends on the maturity and the capabilities of both the client and the provider for the expected benefits to be delivered. And certain external elements will play a critical role in either promoting or jeopardizing the potential success of a total security concept approach.

### CLIENT FACTORS

A number of client factors play a determining role. Generally, though not exclusively, larger and more complex companies tend to be open for integrated propositions, all the more so if they have a centralized purchasing strategy. In this respect, whether a customer is transaction-oriented or relationship-oriented also plays a role. This can to some extent depend on local culture where, for example, in Southern Europe, it is perceived that good relationships tend to be a better basis for doing business. On the contrary, some companies make a strategic choice of deliberately rotating (purchasing) people in order to not allow any longstanding relationships to build up. It is argued that combined services stand a better chance of being introduced in companies with a more relationship-oriented culture.

Analysis has also indicated that a strong relationship with senior management helps in shaping a 'dominant coalition' in favor of a shift towards bundled projects. A good track record of service delivery over a number of years will also help. However, incumbency is no guarantee for future success if the organisational and technical skills to master a totally different conceptual approach are not present.

Organisations that are familiar with technological integration and favour seamless information streams will often prefer integrated offers, as such concepts are already an integral part of their day-to-day core business experience. They will have the maturity to understand and evaluate the benefits of the integrated security approach. It is generally the type of customers who are also keen on searching for innovative elements and striving for permanently optimised and state-of-the-art security solutions.

## REGULATION

In a regulated environment the strong requirement for compliance can favour bundling, in particular for those companies that do not consider security compliance and awareness as being of strategic influence to their own activities. The security business is highly regulated and the dialectic schism between security, on the one hand, and privacy or personal sphere, on the other, is likely to lead to changes in what is legally tolerated or what are the accepted zones of operation. A conceptual approach can take over (part of) this implementation burden from the customer and integrate these aspects into the fully outsourced governance. Yet the strategic impact of security aspects on a customer's internal processes and activities might incite him to keep (part of) it under internal control.



## TECHNOLOGICAL PUSH

One of the most significant drivers in the process towards integration is the push brought by technological evolution. First of all, we see guard services in the field (through handhelds and tablets) or operations in control rooms become more and more equipped with tools bringing technical service support and on-screen visualization of instructions, procedures, plans and so on, and with real-time reporting output for the internal organisation as well as for the client. Here the drivers are mainly process improvements and the desire of guarding companies to differentiate their service offering through technical add-ons with a clear view to improve quality levels.

The speed of progress and the intensity of impact of these technical support tools are however not comparable at all to the giant evolution leaps of electronic products and software in recent years. Legacy electronic products such as intrusion, access control, fire detection or CCTV are traditionally homed to a field panel and power supply and connected by kilometers of proprietary wiring to physical access points such as doors. These set-ups are being slowly but surely replaced by IP-based identity management software systems which connect to IP-based cameras, gateways and intercoms at the physical access points. Likewise, these different applications will, in time be more integrated on the same platforms, or at least will have to interconnect with each other. Particularly in the area of video surveillance, plenty of interesting innovations considered futuristic some time ago are becoming reality today. Take as an example real-time forensics, which is the ability to use recorded video to analyze an image and provide feedback in a matter of seconds. An intruder once identified, by taking into account certain characteristics, can be automatically tracked and followed throughout an entire building in real time.



“The recent crisis has hit our economies hard. We are moving towards new economic balances and it is highly unlikely that we will ever go back to the pre-2008 recession growth.”

#### COST REDUCTION AND EFFICIENCY EFFORTS

Cost effectiveness will also very often emerge as a driver to consider integrated security services and products. In Europe (certainly in Western Europe) and in North America, where economic growth is low today, cost management strategies and programs point to the need for increased efficiency, a better cost/output balance or, simply, for better security at lower cost. In the transaction process, savings can be achieved but often in a rather less obvious or quantifiable way. Management cost savings within the customer's organisation depend

on their own capacity of streamlining all the necessary knowledge into one or a limited number of contact points. Time savings will depend on exactly the same capacity in the provider's organisation. The bigger yield, the greater ROI should be found in the efficiencies of the integrated production and delivery process, and in a more efficient output.

Additional advantages can even be drawn in case of crossover between security and business operations. Advances in video analytics and system integration have transformed security technology into a business insight tool. As an example, image analysis to detect overcrowding can equally be used as a marketing tool by generating heat maps where people are congregating and shopping at different moments on different days. With this information, organisations can improve store lay outs and marketing campaigns and even optimize staff scheduling decisions, which all have an impact on their bottom line.

Part of a cost management strategy could also depend on risk reduction policies. Organisations with a high risk perception concerning IT or security complexity and not having or wanting to have the competent resources, can tend to favour bundled services. In a similar respect, businesses (temporarily) doing badly and needing to focus on primary processes, may well see combined offerings as a cost driven, low management solution.

#### DEMOGRAPHICS

The recent crisis has hit our economies hard. We are moving towards new economic balances and it is highly unlikely that we will ever go back to the pre-2008 recession growth. In these newly found economic realities, employment is becoming one of many new challenges.

In the old model, GDP growth and employment rates would over the years generally show similar patterns. An economy's dynamism translated in growth figures would traditionally create jobs. The situation observed in the last couple of years is one where GDP growth picked up slowly but employment recovery was more or less stalled (a phenomenon that is also

described as 'jobless growth'). Growth in GDP recently corresponded mostly to an increase in productivity and hours worked mostly driven by IT- or technological evolutions, leaving less room for job creation. And despite current relatively high unemployment ratios, it is foreseen that there will be for some time to come a growing shortage of professional and qualified labour force in different domains on many local markets. This is also the case in the security business.

Furthermore, another pattern will emerge. Job content will change at an ever increasing speed from one decade to another; some jobs will even disappear and be replaced by totally new ones. Different forces create this evolution, again not in the least technological progress being one of them.

Aging workforce is a further overall phenomenon in Europe. Eurostat reports or OECD communications on demographic evolutions demonstrate this clearly. By the continuation of the current trend of aging, more than 25% of the workforce after 2020 will probably be 55+. All industries face the potential risk of a significant number of employees leaving the workforce over the next few years as baby boomers are reaching the traditional retirement age, with the current instream of the younger generations hardly being able to fully replace them. So other solutions have to be explored.

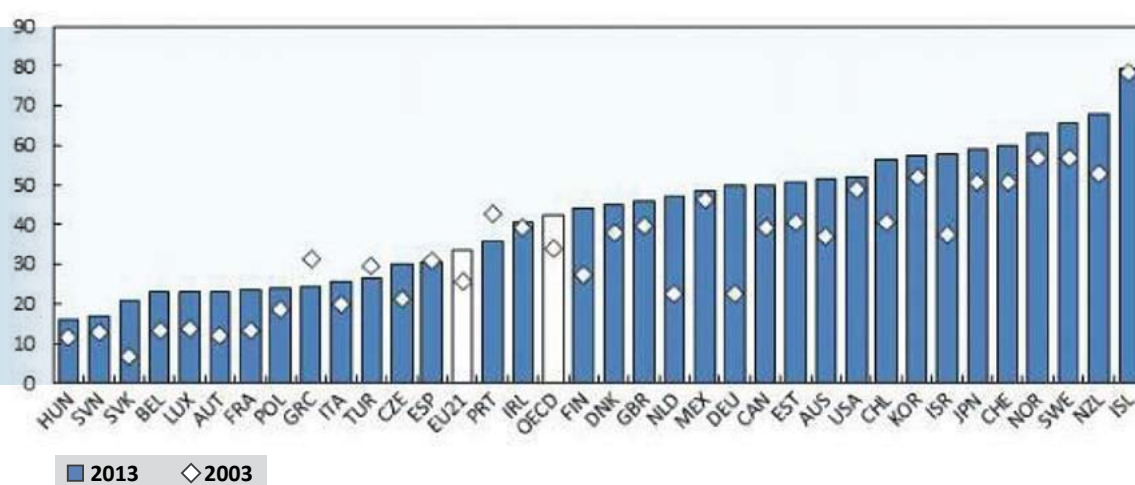
One of the challenges could therefore be to promote longer employment of current employees and recruitment of older workers. The continued rise in life expectancy and the uplift of the age of legal retirement being implemented in many countries help in this respect, but active measures should be taken to foster employability, job mobility, permanent training opportunities or other attraction points and efforts for older security guards to stay in work longer. Most organisations are ill-equipped to meet these challenges associated with accompanying older workers to keep the necessary motivation and skills to have longer careers. As well as they can be unfamiliar with managing potential issues of the growing age mix where older employees will work next to younger ones, having totally different sets of values, a different image of the world and different expectations from the workplace.

Never before, companies had to cope with the differences of four generations coming together on the workforce.



## More older people are working but large country differences remain

Employment of older workers aged 60-64 as a percentage of the population in the age group



Source: OECD (2014), «Labour Market Statistics: Labour force statistics by sex and age», OECD Employment and Labour Market Statistics (database). DOI: 10.1787/data-00309-en

## WORKFORCE SHIFTS

In a scarce employment market it will be no be easy task to attract the younger generations to our industry and retain them.

Due to the traditional – or does one dare to say for a very long time old-fashioned - image of the guarding industry, it was often perceived as not the most attractive working environment. The stereotype of the security guard manually opening a gate is far away from today's job with much more challenging content. In the past the guarding industry has not really succeeded in promoting the modern content of current guard jobs. However, in recent years a number of campaigns were launched to positively position the image of the security guard. In some countries efforts have been made to emphasise the attraction of the sector, and this should be reinforced. A number of measures like premiums for night and/or weekend shifts or for higher qualifications have been adopted to this end.

On top, there is the high degree of flexibility that is not being seen as interesting in the work – life-balance of the Y- and Z-generations. And in recent years this has increased even more. Instreaming younger guards – male but certainly also female – have a clear and different view on where the limits of their flexibility are. The attraction of more female personnel is a big challenge but also an opportunity as most countries today largely remain with under 10% of

female presence in the current security workforce, Again, hiring female guards is something our industry has not been strongly familiar with.

Furthermore, the need for correct mastery of the local language and knowledge and understanding of local culture and legislation make it difficult, at least in the short term, and without decent integration, to source potential security guards from far away regions and cultures.

In the field of electronic security, the situation is very similar in overall outlook although the underlying context is sometimes different. Availability of qualified technical labor force has been an issue in Western Europe for some time, not necessarily for reasons of unattractiveness, but rather because of the scarcity of the overall offer of technical profiles compared to a growing market demand for specialized technical personnel. And organisational requirements like flexibility and availability (stand-by shifts at night and during weekends), inevitable in the service departments of installers and integrators, can be seen as deterrents, in particular with the younger generation of engineers. If locally unavailable, some try to find them in further away regions or far away corners of the world. What is more, aging of this type of workforce is also a reality. It is clear that the war for talent in the field of technicians, engineers and IT-developers is also heavily weighing on many installers and integrators in our industry and will go on to do so for a number of years to come. Although the situation is not fully comparable between all countries – some struggle more than others – it remains a European tendency that our industry has to be aware of.

“The requirement of technical and IT-skills will probably evolve rapidly, fueled by the frenetic speed of innovation, thus becoming maybe one of the most important focus points for future security operations.”

## TRAINING AND EDUCATIONAL REQUIREMENTS

Current and future generations of security guards will have to be more competent on various levels of skills and attitudes. Different and evolving educational needs & requirements emerge.

Training on legal requirements and knowledge of rules & regulations will remain elementary and might even have to be intensified in a world where criminality is still a strong concern for citizens and companies and where the private security industry will get an ever increasing importance in assisting and complementing public law enforcement agencies in fulfilling a societal duty of crime prevention and protection in crisis situations.

But customers expect much more from security staff today, such as conflict handling skills or language skills in a growing international and multi-cultural environment. This is more of an attraction point for younger generations as, in many countries they are growing up in multicultural and multilingual contexts, due to television, games, internet and other modern communication media. Conversely, such requirements are not as obvious for many older guards who want to stay on. Care has to be given to the development of their skills.

The requirement of technical and IT-skills will probably evolve rapidly, fueled by the frenetic speed of innovation, thus becoming maybe one of the most important focus points for future security operations. Many older guards today are unfortunately struggling with IT-skills due to the evolution of requirements. Guarding was accessible in the past for people with lower qualifications and the industry has done many efforts to change this, by recruiting more qualified staff and/or by investing in in-house training. Still the tasks were relatively simple from a technical point of view. This is changing dramatically.

In alarm receiving centers and video surveillance rooms, the technical and IT-level of the operators must follow the specifications of the technological solutions installed and connected. But also on customers premises or in mobile operations, security guards will have to become and remain familiar with the use of electronic security platforms they have to operate in a local control center, or with PDAs, tablets or other devices used in the professionalized process approach of guarding activities as described before.

Continued focus on education will undoubtedly be an absolute imperative in the fast changing world of installers and integrators as well. It will also require a particular focus on the knowledge evolution of older engineers – but not only them- in keeping them up to speed with IT, PSIM systems (Physical Security Information Management Systems) and big data evolutions.



## SOCIAL RELATIONS IN GENERAL

In such an environment of scintillating change, the relationships with social partners will also have to get a different pattern and content. In a more complex working environment, focus most probably will more have to be put on future opportunities. Today we are living in a world where individual talent will be the determining factor for future expectations rather than generalised criteria of classified groups under the old formulas that more and more will cease to exist. Today we are living in a world where individual talent will be the determining factor for future expectations rather than generalized criteria of classified groups that more and more will cease to exist under the old formulas. Should modern social dialogue and debate then not be revisited by unions and employers together, and move progressively in the light of the changing and more complex workforce? And should focus not be placed more and more on career management and job change combined with a necessary level of job protection; more on training and development; philosophically more on future opportunities rather than on old models? Another potential social paradigm shift is in the making, also in our industry.

### **The security company: Internal organisational and social/HR challenges**

It is clear there are many determining issues in developing and implementing a bundling strategy that will ultimately drive success. As combined offering in security involves integrating a range of services and products, it exacerbates the complexity and importance of resolving these issues and challenges in order to reap the potential profits. What appears to be an easy winning strategy could end up with disastrous impact to a company's bottom line if not managed correctly.

Integrated services can be offered by combining products of different organisations bringing their competencies together for the sake of a given project. We are developing hereafter an approach that is based on having the necessary different capabilities within the same organisation under one overall command. However, the same considerations apply when different organisations combine their strengths, but very often in an even more difficult or critical way.

## THE NEW SECURITY COMPANY

What should the new security company then look like? Managing a guard service process is not the same as running an installation department that is getting more and more IT-driven. If the aim is to provide total concept offerings, the company should be capable of bringing a number of skills together and of transforming an organisation from a silo culture into a collaborative mode. Indeed, a multitude of operationally stand-alone installation and service flow management processes need to culminate seamlessly into a security solution.

“Due to the complexity in steering different service and installation cultures, if one aims to have a combined guarding / electronics offering in this technologically permanently reinvented security vision, other new organisational and competence needs arise.”

This complex mechanic should not only function in the execution phase of a contract, the security provider should be able to demonstrate the required benefits to its customer long before, in the prospection and sales transaction phase. This requires a well prepared and convincing marketing and commercial strategy. The successful integrator shall need to have sales teams being able to professionally understand and present physical and electronic security with a solid IT and network knowledge brought to the table.

More than one obstacle will have to be dealt with in the full process of preparation and realization of such types of security projects. Internal communication obstacles or barriers and hierarchical thresholds have to be overcome between the constituting elements of the integrated approach. Cannibalistic consequences will have to be tackled. Indeed, technology will, for example, more than often replace a number of simple human activities. Key to the success is the masterful integration of technological products and platforms with the ever needed guard capacity to interpret and react in a perfectly complementary constellation. This is where the real operational added value lies.

An organisation should also be able to rely on the adequate number and necessary qualification level of human resources in order to be capable of realizing successful and harmonious total security concepts. Incidentally, many of them are just as critical if one continues to embrace the silo approach of either guard or electronic security offerings. The new security company will anyhow be one that can cope with the socio-demographic evolution of the current and future market places in a new economic dynamic. This entails human resource challenges that are of a different order than some years ago. The new approach is one where talent has to be found and treated as a scarce resource, nurtured and developed at different levels of the workforce population, with increasing focus on customized or differentiated approaches to satisfy these different age categories and generations at the same time.

Due to the complexity in steering different service and installation cultures, if one aims to have a combined guarding/electronics offering in this technologically permanently re-invented security vision, other new organisational and competence needs arise as explained before. And these are more fundamental necessities rather than searched for differentiators.



Therefore coherence of strategy is more than ever crucial. Going for a particular route means more than simply embracing the elements that create its strengths. There are various variables influencing the potential success of an integrated approach. If the riskier areas are not strongly managed and, as a consequence of this, the “gaps” become too big, they will probably dramatically weigh on performance efficiency and ultimately negatively influence the final output and the result – operationally and financially.

There are clear indications that the tendency to outsource security in a total concept approach is strongly winning ground these days, whether it is because of the perceived benefits by more customers than before, or because it might turn out to be another cyclical change brought about by cost priorities. The fast speed of technological evolutions and improvements, driven by the never ending creativity of development engineers is bound to continue. So, going the route for SAAS, security as a service of integrated elements, implies being permanently up to speed with these waves of renewal.

And understanding customer needs that become increasingly more outspoken and complex will be instrumental in the process of determining the right strategic choices.

Because delivering high quality service primarily strengthens the relationship with the customer and creates further opportunities, wherever they may lie tomorrow.

**Danny Vandormael**

Board Member CoESS – CEO SERIS Group Benelux



" The organisation has a tradition in presenting a quantitative overview of European security services, also called 'Facts and Figures'. "

# CoESS' Facts and Figures 2013

CoESS, or 'Confederation of European Security Services', is the European umbrella organisation for 26 national private security employers' associations. The organisation has a tradition in presenting a quantitative overview of European security services, also called 'Facts and Figures'. This chapter of the fifth White Paper presents a summary of its 2013 edition. A full overview can be consulted on the following website: [www.coess.org](http://www.coess.org).

This chapter is divided in six sections. First, we will discuss our methodology. Second, we will present a quantitative summary of the European private security industry. Third, we will highlight the EU mapping of private security legislation. Fourth, we will discuss private public cooperation in private security. Fifth, we will present the fight against piracy on high seas and maritime security. Sixth, we provide a short conclusion.

## 1. Introduction

The present results are a summary of a report called 'Private Security Services in Europe – CoESS' Facts & Figures 2013'. This document is a fourth edition<sup>1</sup> and provides a comprehensive overview of the European private security services landscape and targets a wide geographical area of 34 countries, i.e. the 28 EU Member States and six additional European countries: Bosnia & Herzegovina, Macedonia, Norway, Serbia, Switzerland and Turkey.

The report allows for an updated and accurate outline of the private security services industry in each country focusing on the following aspects:

- Economic aspects: private security market, private security contracts, private security companies and private security guards.
- Legal aspects: Private security legislation, controls and sanctions, collective labour agreements, entrance requirements and restrictions, specific requirements, powers and competences, weapons, K9 (dogs), training and related provisions, public-private cooperation and the fight against piracy on the high seas.

We have included information of two new sections, i.e. public-private cooperation and the fight against piracy on the high seas. Subsequently, we will provide an overview of these issues.

The 2013 report is the result of an intensive consultation process predominantly among CoESS' member federations at national level and other national private security organisations and European countries.

<sup>1</sup> CoESS has launched Facts and Figures on Private Security in Europa in 2004, 2008 and 2011.

Collected information was incorporated into individual country fiches consisting of tagged information, which facilitates the consultation of facts and figures for each country and the identification of similarities and differences between the 34 targeted countries.

## METHODOLOGY

The information reflected in the individual country fiches was mainly supplied by CoESS' member federations at national level and other national private security organisations and European countries<sup>2</sup>. Additional pertinent information was gathered through desk research and the assistance of (local) authorities, international organisations, diplomatic and academic bodies and other relevant organisations<sup>3</sup>.

Prior to their participation in the report, CoESS' member federations at national level and other national private security organisations and European countries received a detailed outline detailing the expected data. This outline is mirrored in the individual country fiches.

The country fiches follow a uniform structure. However, as it was decided to include all available data and given the wide variety of detailed information provided, some fiches comprise additional or more elaborate information. Where no information was received or could be collected, tags were omitted from the individual country fiches.

It is important to stipulate that we have not received an update from the following countries: Bosnia Herzegovina, Bulgaria, Cyprus, the Czech Republic, Denmark, Estonia, Hungary, Lithuania, Portugal and Slovakia. We gathered information from public authorities and judicial information in order to update the data as accurately as possible.

<sup>2</sup> CoESS hereby warmly thanks all organisations involved for their contributions and the time and effort invested in order to achieve this successful outcome. Their continued support helps create a comprehensive and realistic representation of the European private security services industry today.

<sup>3</sup> CoESS hereby expresses its sincere gratitude for their invaluable input.

## STRUCTURE OF THE REPORT

The 'Facts and Figures 2013' report contains 34 country fiches in alphabetical order, each one representing a single country. All country fiches consist of three main sections:

- General information: Population, Gross National Income (GNI), ratio security force versus population, ratio police force versus population.
- Economic aspects: Private security market, private security contracts, private security companies, private security guards.
- Legal aspects: Private security legislation, controls and sanctions, collective labour agreements, entrance requirements and restrictions, specific requirements, powers and competences, weapons, K9 (dogs), training and related provisions, public-private cooperation, the fight against piracy on the high seas.

We also presented an overview of our two new sections, i.e. public-private cooperation and the fight against piracy on the high seas. The last part of the report, the EU legislative mapping, reflects the level of strictness of national-level private security legislations across Europe and provides an analysis of the responses to the questions within the legal aspects section of the Facts & Figures 2013 questionnaire. Finally, the conclusions section provides a consolidated overview of the facts and figures available for the 34 targeted countries.

## 2. Summary of the CoESS' Facts and Figures 2013

Presenting a European quantitative overview of the private security industry is unique, since scientific research on the matter is scarce. However, having a trustworthy analysis is difficult because of several variables. The private security industry is neither homogenous nor structured. Results depend on the availability of information. This means we have to rely on the goodwill of organisations to continuously invest in delivering up-to-date results. Following countries were unable to present new statistical data: Austria, Bosnia & Herzegovina, Bulgaria, Cyprus, Czech Republic, Denmark, Italy, Latvia, Lithuania, Luxembourg, Macedonia, Malta, Portugal, Slovakia and the United Kingdom. This means that the presented results for these countries rely on information from our previous facts and figures reports.

The following table focuses on seven variables: population, gross national income, the yearly turnover from the private security industry, the total number of private security companies, the total number private security guards, the average ratio security force per 10 000 inhabitants and the average ratio police force per 10 000 inhabitants. As aforementioned, our results covers data from 34 countries, i.e. the 28 EU Member States and six additional European countries (Bosnia & Herzegovina, Macedonia, Norway, Serbia, Switzerland and Turkey).



Private Security in Europe – A Quantitative Overview							
Country overview	Population	Gross National Income	Yearly turnover private security industry	Total number private security companies	Total number private security guards	Average ratio security force/ 10 000 inhabitants	Average ratio police force/ 10 000 inhabitants
Austria	8 374 872	€ 274 300 000 000	€ 500 million	202	12 259	1/523	1/380
Belgium	11 161 642	€ 33 per capita	€ 641.7 million	195	18 136	1/637	1/282
Bosnia Herzegovina	3 844 046	€ 13 530 000 000	€ 28.8 million	94	4 207	1/2 295	1/217
Bulgaria	7 563 710	€ 35 120 000 000	€ 311.22 million	1 200	57 146	1/132	1/155
Croatia	4 425 747	€ 46 460 000 000	€ 170 million	353	32 295	1/249	1/205
Cyprus	803 147	€ 22 560 000 000	€ 25 million	60	1 700	1/472	1/156
Czech Republic	10 506 813	€ 135 130 000 000	€ 692.31 million	5 629	51 542	1/203	1/238
Denmark	5 534 738	€ 245 670 000 000	€ 430 million	470	5 000	1/1 106	1/503
Estonia	1 340 122	€ 13 940 000 000	€ 128 million	350	4 580	1/289	1/412
Finland	5 426 674	€ 194 581 000 000	€ 580 million	226	15 939	1/678	1/729
France	65 578 819	€ 2 150 372 000 000	€ 5 545 million	9 659	149 650	1/438	1/256
Germany	80 523 746	€ 4 227 103 918 96	€ 5 200 million	4 000	183 408	1/322,1	1/370
Greece	11 062 508	€ 242 000 000 000	€ 435 million	1100	60 000	1/392	1/276
Hungary	10 014 324	€ 97 600 000 000	€ 550 million	3 000 – 3 500	22 000	1/125	1/380
Ireland	4 500 000	€ 128 000 000 000	€ 587 million	200	20 000	1/300	1/360
Italy	60 340 328	€ 1 569 000 000 000	€ 2 700 million	1 299	45 512	1/1 260	1/565
Latvia	2 248 374	€ 20 780 000 000	€ 365.93 million	500	21 500	1/105	1/300
Lithuania	3 244 601	€ 29 650 000 000	€ 58 million	121	11 000	1/294	1/290
Luxembourg	502 066	€ 29 190 000 000	N/A	13	2 700	1/185	1/330
Macedonia	2 114 550	€ 6 790 000 000	N/A	163	2 878	1/410	1/213
Malta	420 000	€ 4 370 000 000	N/A	25	3 604	1/117	1/216
Norway	4 858 199	€ 312 590 000 000	€ 1 002 million	92	7 600	1/387	1/567
Poland	38 533 299	€ 10 315 GNI per capita	€ 1 913 million	4 200	250 000	1/155	1/377
Portugal	10 637 713	€ 178 250 000 000	€ 730 million	160	38 928	1/275	1/228
Romania	20 020 074	€ 348 billion PPP dollars	€ 497 million	1 860	121 041	1/176,22	1/350
Serbia	7 186 862	€ 32 396 756 877	€ 153 million	780	30 000	1/38.000	1/42.000
Slovakia	5 424 925	€ 59 990 000 000	N/A	N/A	17 200	1/314	1/251
Slovenia	2 058 821	€ 36 780 000 000	€ 1.3 million	135	7 520	1/326	1/256
Spain	46 704 308	€ 1 368 805 000 000	€ 3 392 million	1 490	223 936	1/513	1/213
Sweden	9 651 531	€ 403 690 000 000	€ 896 million	250	20 000	1/467	1/467
Switzerland	8 039 060	€ 507 740 000 000	€ 849 million	1 135	16 220	1/495	1/468
Turkey	75 627 384	€ 679 408 992 506	€ 2 832million	1 303	596 121	N/A	N/A
United Kingdom	62 008 048	€ 1 956 840 000 000	€ 3 970 million	2 500	364 586	1/170	1/382
The Netherlands	16 779 575	€ 612 490 000 000	€ 1 300 million	1 168	28 550	1/0,0017	1/0,0038

Apart from these results, we can also present an overall overview of the following variables. Licensing for private security companies is mandatory by law in  $\pm 94\%$  of the European countries. A 'specialty principle' for private security companies<sup>4</sup> is embodied in the legislation governing the private security industry in  $\pm 40\%$  of the cases. The average number of armoured cars in Europe for Cash-In-Transit (CIT) operations is 15 955.

Furthermore, licensing for private security guards is mandatory by law in  $\pm 86.67\%$  of the cases. The average age of a private security guard working in the private security industry is  $\pm 36$  and the average percentage of men active in the private security industry is  $\pm 83\%$  versus  $\pm 17\%$  for women. An Equal opportunities (EO) policy is in place in the private security industry in  $\pm 76.47\%$  of the European countries. The average annual staff turnover rate in the European private security industry is  $\pm 32.71\%$ .

The private security industry is regulated by sector-specific legislation in  $\pm 79.41\%$  of the European countries. The competent national authority in charge of drafting and amending legislation regulating the private security industry is the Ministry of the Interior ( $\pm 53\%$ ), the Ministry of Justice ( $\pm 16\%$ ), the police ( $\pm 6\%$ ) and others ( $\pm 25\%$ ).



<sup>4</sup> The 'specialty principle' in private security means that one single legal entity, officially recognised as a private security company, is only allowed to carry out private security services and not auxiliary or additional services.

The competent national authority in charge of controls and inspections for the private security industry is the Police ( $\pm 41\%$ ), the Ministry of the Interior ( $\pm 38\%$ ), the Ministry of Justice ( $\pm 3\%$ ) and other ( $\pm 18\%$ ). The competent national authority in charge of imposing administrative sanctions is the Ministry of the Interior ( $\pm 38\%$ ), the Police ( $\pm 29\%$ ), the Ministry of Justice/Courts ( $\pm 15\%$ ) and others ( $\pm 18\%$ ). The competent national authority in charge of imposing penal sanctions is the Police ( $\pm 25\%$ ), Courts ( $\pm 38\%$ ), the Ministry of the Interior ( $\pm 22\%$ ) and others ( $\pm 15\%$ ). In all the European countries, one of the possible sanctions can result in the withdrawal of a company's license and/or an individual guard's license.

There are sector-specific binding collective labour agreements in place for  $\pm 57.85\%$  of the private security industry. Entrance requirements at company level (owners) are a clean criminal record ( $\pm 88\%$ ), background screening and/or a testimonial of good moral character ( $\pm 87\%$ ). Entrance requirements at personal level (operational staff) are a clean criminal record ( $\pm 97\%$ ), background screening and/or a testimonial of good moral character ( $\pm 97\%$ ).

The average minimum age for private security guards to be able to enter the private security profession as managers is  $\pm 19$ , as operational staff  $\pm 18$ . All countries have specific requirements related to the uniforms and identification cards of private security personnel. Uniforms are mandatory in  $\pm 95\%$  of the European countries, identification cards are mandatory in  $\pm 98\%$  of the European countries.

Regarding the power and competences of private security guards, we can indicate that in  $\pm 59\%$  of all the European countries private security guards have the same rights as any other citizen. In  $\pm 41\%$  they can exercise additional powers. Furthermore, private security guards are allowed to perform a search and seizure (full or limited)  $\pm$  in  $61.77\%$  of the European countries.

The use of weapons is allowed in  $\pm 82\%$  of the European countries and in  $\pm 82\%$  of the cases, a special licence is required for private security companies providing armed private security services. Also, there are legal requirements for storing weapons after hours ( $\pm 88.46\%$ ) and companies also need to keep a detailed weapons register ( $\pm 63\%$ ). Private security guards must follow specialised and obligatory training (by law) in order to be able to carry and use weapons in  $\pm 96\%$  of the European countries.

Dogs can be used for the provision of private security services in  $\pm 91\%$  of the cases. A special license is required for private security companies using dogs for the provision of private security services ( $\pm 44.44\%$ ) and private security guards must follow a specialised and obligatory training (by law) in order to be able to use dogs for the provision of private security services ( $\pm 57.14\%$ ).

There is an obligation for private security guards to follow basic training in  $\pm 97\%$  of the European countries. This training programme is mandatory by law ( $\pm 97\%$ ) and the average number of training hours is  $\pm 98.26$ . Upon successfully accomplishing basic training, private

security guards are issued with a certificate of competence ( $\pm 87\%$ ). Mandatory specialised training exists by law for private security managers, i.e. operational managerial staff influencing operations in  $\pm 57.58\%$  of the cases. Last, follow-up or refresher training exists in  $\pm 76.67\%$  of the European countries.

### 3. EU legislative mapping

The present EU legislative mapping reflects on the level of strictness of national-level private security legislation across Europe and provides an analysis of the responses to the questions within the legal aspects section of the Facts & Figures 2014 questionnaire.



The answers provided to a number of relevant questions, i.e. answers related to private security legislation at national level, were used to produce a rating on the strictness of private security legislation for each country. A numerical value was allocated to each country on the basis of the answers given. Points were allocated to each country depending on the answer given and the value was subsequently calculated from the total number of points. Five judgment criteria were devised: very strict, strict, medium, low, weak or non-existent. These criteria were then given numerical values as can be seen below. The countries could be assigned to different brackets and this assessment could then be transferred to a graphical overview to indicate the different levels of strictness.

Rating	Category
<b>0</b>	<b>Non-existent</b>
<b>1-5</b>	<b>Weak</b>
<b>6-13</b>	<b>Low</b>
<b>14-20</b>	<b>Medium</b>
<b>21-27</b>	<b>Strict</b>
<b>28-34</b>	<b>Very strict</b>

The questions that were used to formulate a rating related to the provisions and requirements that were found within national level legislation. For example, it was key to establish if the private security services industry is regulated by law and if so, which areas of the industry are covered.

Furthermore, it was necessary to determine whether sanctions are enforced and whether there are entrance requirements or restrictions in place.

Low	Medium	Strict	Very strict
<ul style="list-style-type: none"> <li>•Austria</li> <li>•Czech Republic</li> <li>•Poland</li> </ul>	<ul style="list-style-type: none"> <li>•Ireland</li> <li>•United Kingdom</li> <li>•France</li> <li>•Germany</li> <li>•Bulgaria</li> <li>•Latvia</li> <li>•Cyprus</li> </ul>	<ul style="list-style-type: none"> <li>•Turkey</li> <li>•Greece</li> <li>•Macedonia</li> <li>•Romania</li> <li>•Bosnia and Herzegovina</li> <li>•Croatia</li> <li>•Slovenia</li> <li>•Slovakia</li> <li>•Italy</li> <li>•Switzerland</li> <li>•The Netherlands</li> <li>•Estonia</li> <li>•Lithuania</li> <li>•Denmark</li> <li>•Norway</li> <li>•Finland</li> <li>•Malta</li> </ul>	<ul style="list-style-type: none"> <li>•Serbia</li> <li>•Hungary</li> <li>•Belgium</li> <li>•Sweden</li> <li>•Portugal</li> <li>•Spain</li> <li>•Luxembourg</li> </ul>

## 4. Public private cooperation in the European private security industry

This section gives an overview of public-private cooperation in 34 European countries. We will briefly discuss the methodology. Subsequently, we will provide an overview of the data.

### METHODOLOGY

This overview on public-private cooperation collects information from the questionnaires, CoESS documents and online information (judicial information). We also contacted public authorities in order to have additional data.

We do not have information of the following countries: Bosnia Herzegovina, Bulgaria, Cyprus, the Czech Republic, Denmark, France, Hungary, Latvia, Lithuania, Luxembourg, the Netherlands, Portugal, Slovakia, Sweden and the United Kingdom. This is either due to non-response or to a lack of information from the questionnaires.

We received information from the following countries: Austria, Belgium, Croatia, Estonia, Finland, Germany, Greece, Ireland, Italy, Macedonia, Malta, Norway, Poland, Romania, Serbia, Slovenia, Spain, Switzerland and Turkey.

Information is incomplete for the following countries: Austria, Estonia, Germany, Italy and Macedonia.

This overview provides information on the following issues:

- Whether or not private security companies can provide services and activities that are/would normally be reserved to police forces or other public security authorities;
- Which services private security companies can provide;
- The legal basis of these services (general legislation – specific legislation – ad hoc agreements with the police);
- Whether or not there is an increasing trend of transfer (totally or in support) of police competences towards private security companies;
- A description of these trends;
- Fields where the respondents foresee more “public” activities for private security companies.

### PUBLIC-PRIVATE COOPERATION IN EUROPE

Private security companies cannot provide services and activities that are/would normally be reserved to police forces or other public security authorities in: Ireland, Malta, Poland, Romania, Serbia, Slovenia and Turkey.



“Private security companies can provide services and activities that are/would normally be reserved to police forces or other public security authorities in some countries.”

Private security companies can provide services and activities that are/would normally be reserved to police forces or other public security authorities in: Austria, Belgium, Croatia, Estonia, Italy, Finland, Germany, Greece, Norway, Spain and Switzerland.

These services are:

- Belgium: supporting police forces, making statements regarding the immediately observable situation of goods on the public domain, as an assignment given by the public authority or by the commissioning party, accompanying groups of persons with the objective of guaranteeing road safety, accompanying exceptional vehicles with the objective of guaranteeing road safety.
- Croatia: airport security.
- Estonia: handling of speed cameras (the pictures are directly transferred to the police authorities for a fee per picture).
- Finland: investigations, stewards (guard training as well) assist the police in keeping the public order and security in listed places like Shopping Centers (Public Order Act).
- Germany: transfer of duties for the security staff in the aviation sector.
- Greece: guarding services at embassies and athletic events.
- Norway: special services, embassy guarding. However, this must always be cleared by the police.
- Switzerland: prisoner transport, prison services, railway security, migration services.
- Spain: services in prisons, foreign detention centers, public premises and “participate in provision of services mandated to public security, in a complementary way to police activities”. However, these services are yet to be developed and must be performed in a complementary way to public police forces.

This is based upon the following legislation:

Legal basis for private security companies which can provide services and activities that are/would normally be reserved to police forces or other public security authorities	
General legislation	Belgium, Spain (Act 5/2014)
Specific legislation	Germany, Finland (Public Order Act 612/2003), Switzerland
Ad hoc agreements with the police	Greece, Italy, Norway

In Macedonia, the Ministry of Interior formed a separate department that works exclusively with the private security sector. They organise seminars and workshops for the implementation of the new law.

There is an increasing trend of transferring police competences (totally or in support) towards private security companies in:

- Croatia: airport security. Greece: guarding services in embassies and athletic events
- Switzerland: delegation of activities which do not belong to the core competences of police services, such as parking control and railway security.

There is no increasing trend of transferring police competences (totally or in support) towards private security companies in Finland and Norway.

Following countries foresee more “public” activities for private security companies in:

- Croatia: airport security.
- Greece: guarding services in embassies and athletic events.
- Switzerland: traffic services, prison services; patrolling and guarding parking lots.

## 5. The fight against piracy in high seas – maritime security

This section gives a short overview of maritime security in the aforementioned 34 European countries. We briefly discuss the methodology. Subsequently, we will provide an overview of maritime security.

### METHODOLOGY

As mentioned in the summary, we could not obtain data from all European countries. This overview on maritime security collects information from the questionnaires, CoESS documents on maritime security and online information (judicial information). We also contacted public authorities in order to have additional data.

We do not have information on maritime security of the following countries: Austria, Bosnia Herzegovina, Bulgaria, Hungary, Latvia, Slovakia, the Czech Republic, Croatia, Luxembourg, Macedonia, Romania and Sweden. This is either due to non-response or to a lack of information from the questionnaires.

We received incomplete information from the following countries: Italy, Malta, Norway, Cyprus, Malta, Denmark, Lithuania, Portugal and the United Kingdom. This means that we cannot provide information for every section of this overview.

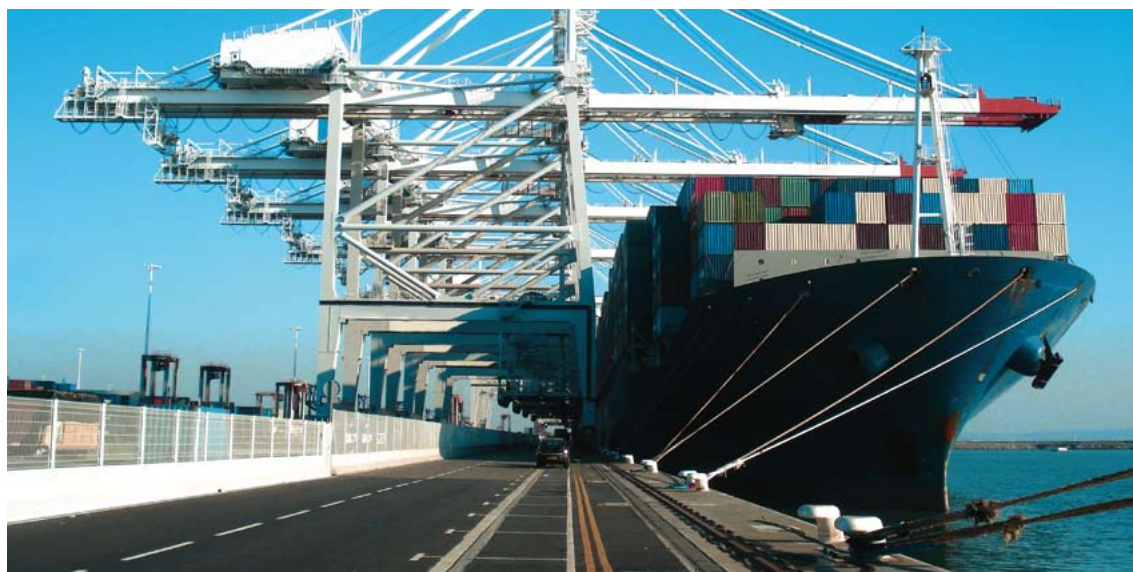
This overview provides information on the following issues:

- Whether or not private security companies can provide services and activities aimed at combating piracy on board of commercial vessels;
- Legislation;
- Whether or not companies need a specific license;
- Training;
- The use of weapons.

#### MARITIME SECURITY IN EUROPE

Private security companies cannot provide services and activities aimed at combating piracy on board of commercial vessels sailing under the flag of their respective countries in: Estonia, France (not administratively authorised), Lithuania, Ireland, Serbia, Slovenia, Turkey, Portugal and Switzerland.

Private security companies can provide services and activities aimed at combating piracy on board of commercial vessels sailing under the flag of their respective countries in: Belgium, Finland, Italy, Germany, Cyprus, Malta, Denmark, Portugal, Norway, Spain, the United Kingdom and the Netherlands.



This is based upon the following legislation:

Legislation for private security companies which can provide services and activities aimed at combating piracy on board of commercial vessels sailing under the flag of their respective countries	
<b>Belgium</b>	Law of January 16 <sup>th</sup> 2013 concerning different measures in the fight against piracy
<b>Cyprus</b>	The Protection of Cyprus Ships Against Acts of Piracy and Other Unlawful Acts Law of 2012 (Law 77(I)/2012)
<b>Denmark</b>	New rules entered into force by 1 July 2012
<b>Finland</b>	Private Security Act 282/2002
<b>Germany</b>	§ 31 Abs. 1 GewO
<b>Greece</b>	Law 4058 of 22 March 2012
<b>Italy</b>	<ul style="list-style-type: none"> <li>• Decree of the Ministry of Interior Affairs no. 266 (December 28<sup>th</sup> 2012)</li> <li>• Decree no. 349/2013</li> </ul>
<b>Malta</b>	<ul style="list-style-type: none"> <li>• Must be in compliance with Legal Notice 19 of 2013</li> <li>• Merchant Shipping Notice 106</li> </ul>
<b>The Netherlands</b>	No legal basis yet. Since June 2011 a shipowner can apply for military Vessel Protection Detachment Team (VPD)
<b>Norway</b>	Forskrift om sikkerhet, pirat- og terrorberedskapstiltak og bruk av maktmidler om bord på skip og flyttbare boreinnretninger (Sikkerhetsforskriften)
<b>Poland</b>	The use of PSASP is approved by Polish law. The main legal basis is “the protection of person and property act” from 22 <sup>th</sup> August, 1997
<b>Spain</b>	Private Security Law
<b>United Kingdom</b>	NA

Private security companies doing this type of activity need a general or specific license in: Belgium, Germany, Norway, Malta, Cyprus, the United Kingdom and Greece.

The amount of companies holding such a license:

- Belgium: one private security company holds a provisional license and one foreign private security company (period of one year).
- Germany: seven companies have a BAFA license (BAFA = Federal Economics and Export Control).

Private security companies doing this type of activity do not need a general or specific license in: Finland and Spain.

Special training for security guards/officers who execute services and activities aimed at combating piracy on board of commercial vessels sailing under the flag of their respective countries exists in: Belgium (basic training of 127 hours and specialized training of 40 hours), Germany, Italy, Spain, Malta and the United Kingdom.

Special training for security guards/officers who execute services and activities aimed at combating piracy on board of commercial vessels sailing under the flag of their respective countries does not exist in: Finland.

Private security guards/officers can use weapons on board in the following countries: Belgium, Finland (although legislation is not 100% clear on this matter), Germany, Italy, Norway, Spain, Malta, Denmark, Greece, the Netherlands and the United Kingdom.

Type of weapons used:

- Belgium: weapons of a calibre of maximum .50.
- Finland: handguns.
- Germany: all weapons are allowed on board, except military weapons.
- Italy: IMDG class 1.4s "explosives" ammunition.
- Norway: small arms.
- Spain: war weapons.
- The Netherlands: handguns and semi-automatic rifles.

Private security guards/officers cannot use weapons on board in the following countries:

- Poland (no legal ground).

## 6. Conclusion

As mentioned in part 2 of this chapter, we must continuously invest in quantitative results of the European private security industry. Since scientific research on the matter is scarce, the CoESS facts and figures are a necessity.

One of the most important conclusions is that, despite the economic difficulties we are facing in Europe, the private security industry is still flourishing. In comparison with the Facts and Figures, edition 2011, we can conclude that private security companies are increasing in Austria, Croatia, Estonia, Finland, France, Germany, Romania, Serbia, Slovenia, Switzerland, the Netherlands and Turkey. Private security companies are decreasing in Belgium, Greece, Hungary, Ireland, Macedonia, Norway, Poland and Spain.

Private security guards are increasing in Austria, Belgium, Croatia, Estonia, Finland, Germany, Greece, Norway, Poland, Romania, Slovenia, Spain and Turkey. They are decreasing in Hungary, Italy, Macedonia, Serbia, Switzerland and the Netherlands.

The yearly turnover in the private security industry is increasing in Austria, Belgium, Croatia, Finland, France, Germany, Greece, Norway, Poland, Spain, Sweden, Switzerland and Turkey and decreasing in Ireland, Romania, Serbia and the Netherlands.

Results are inconclusive for Cyprus, Bosnia and Herzegovina, Bulgaria, Denmark, Latvia, Lithuania, Luxembourg, Malta, Portugal, Slovakia and the United Kingdom.

“One of the most important conclusions is that, despite the economic difficulties we are facing in Europe, the private security industry is still flourishing.”





" The "new security company" must adapt to changing customer requirements, demographic developments and technological advances if it wants to remain successful in the market. "

# The New Security Company in Germany – Challenges facing the private security industry

1. Preliminary remarks
2. Private security companies in Germany: overview
3. Challenges
  - A. THREAT LEVEL
  - B. CUSTOMER SECURITY REQUIREMENTS
  - C. TECHNOLOGICAL DEVELOPMENTS
  - D. COSTS OF SECURITY AND NEEDED IMPROVEMENTS IN THE AWARDING OF CONTRACTS
  - E. WORKING CONDITIONS AND COLLECTIVE BARGAINING POLICY
  - F. DEMOGRAPHIC CHANGE
  - G. AMENDMENT OF LEGAL BASIS
4. Requirements to be met by the “new security company”
  - A. SECURITY CONCEPT
  - B. CUSTOMER SPECIALIZATION
  - C. ORGANISATIONAL MEASURES
5. Summary and outlook

## 1. Preliminary remarks

“Panta rhei” – Everything flows: This piece of wisdom from Classical Greek Philosophy also applies to this day and age. Whether in society, politics or economics: the only thing that never changes is change itself. Demographic change, the digitalization of our everyday life and the workplace, the complete interconnectedness of the “industry 4.0”: these are the mega-trends in the economy and society. For the security industry there is no way around these changes either. The “new security company” must adapt to changing customer requirements, demographic developments and technological advances if it wants to remain successful in the market. The present White Paper will outline the main challenges facing the security business in Germany and list the requirements to be met by the “new security company”.

## 2. Private security companies in Germany: overview

A modern industrial society is characterized by a highly specialized, work-sharing and networked economy. In order to minimize the risk of a costly interruption of production or service provision, a broad spectrum of preventive measures is required.

For over a century businesses, citizens and the governments have made their own arrangements to protect themselves while also drawing on the services of private security companies. The value of the facilities to be guarded, the demands made by clients, the type of equipment used, the major challenges arising out of enhanced risks and the increasingly complex legal framework in which they have to operate – all these factors have constantly added to the requirements to be met by the security companies.

Private security companies in Germany have been subject to commercial law since 1927 and thus come within the purview of the economic authorities. In all other EU countries, with the exception of Austria, the private security companies come within the remit of the Ministries of the interior or justice. Thus as regards our legal basis we are at the bottom of the European league table. In 1996 a course of instruction was introduced. All those entering the security business for the first time must complete this 40-hour course of instruction at a Chamber of Commerce and Industry. For entrepreneurs the course lasts 80 hours. Since 2002 employees must pass a special test for conflict-prone activities in publicly accessible spaces. The instruction and statutory exam do not constitute training but are professional qualifications.

A milestone for the private security companies was the introduction of a 3-year skilled occupation in 2002. Since then over 6,000 young people have successfully qualified as Specialist for Safety and Security. In 2009 another, 2-year skilled occupation was created: Service Specialist for Safety and Security. The vocational courses are a successful reaction to the increasingly demanding security duties. They are an expression of the professionalization of the security business and convey a clearly defined occupational profile for the whole security industry.

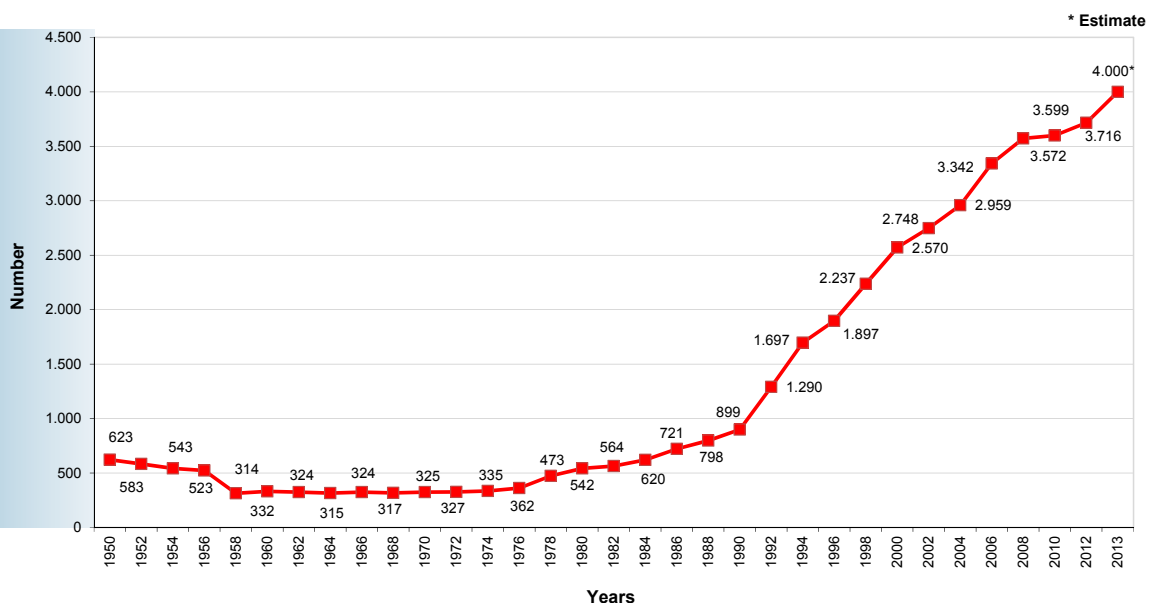
For decades now there have been three fields of activity that are subjected to special statutory regulations which go far beyond commercial law. These are the securing of military property; the protection of nuclear power stations; and the security duties at commercial airports. In these fields the requirements to be met by the efficiency, organisation and accoutrements of the private security providers are just as regulated as in the case of an academic qualification.

Until a few years ago the men and women employed in the security business were largely invisible to the public. They were mainly assigned to securing their clients' premises. This has changed. The securing of events or residential areas, the patrolling of downtown areas on behalf of retailers and municipalities or maintaining a presence on public transport, have led to a heightened public perception of the security business. A high degree of public acceptance has been achieved. Two out of three German citizens consider private security companies to be indispensable for internal security in Germany.

"Two out of three German citizens consider private security companies to be indispensable for internal security in Germany."

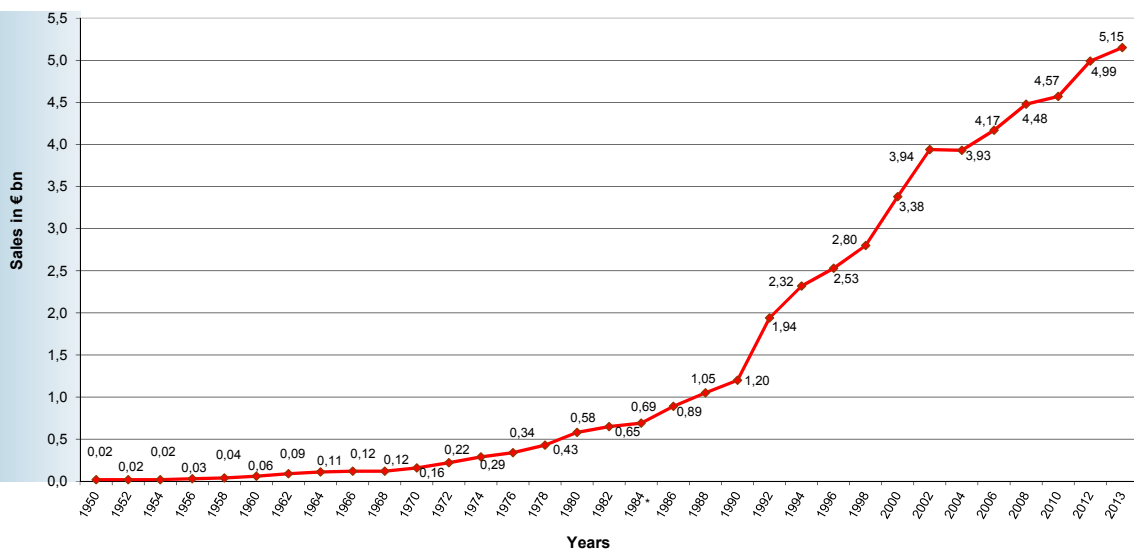
Many companies and institutions are now outsourcing their security-related operations. This outsourcing is the main cause of the increase in the industry's turnover. The following charts show the main changes in recent decades:

**Number of private security companies in Germany**



Source: BDSW calculation based on numbers provided by the Federal Agency of Statistics (Statistisches Bundesamt)

**Turnover of private security companies in Germany  
1950 - 2013**



Source: BDSW calculation based on numbers provided by the Federal Agency of Statistics (Statistisches Bundesamt)

### 3. Challenges

#### A) THREAT LEVEL

To a growing extent the threats faced by German companies are ceasing to have a purely national dimension, but arise out of intensifying global competition with all its attendant risks. This also applies to small and medium-sized enterprises (SMEs), which increasingly have to cope with a wide range of threats and security risks. The most important factors here are white-collar crime – including corruption, sabotage, cyber-attacks and espionage on the one hand – and political instability in foreign markets on the other.

Although German police statistics provide an overview of the development of the above-mentioned criminal offences, they only take account of criminal offences that have been reported. Consequently recent years have seen the appearance of a number of representative surveys of German business by consulting or accountancy firms. These surveys give a comprehensive overview of the threat level.

One study has shown, for example, that the annual financial losses caused by industrial espionage in Germany come to about 11.8 billion euros. The most frequent cases recorded

by German companies involved hacker attacks on IT systems and equipment. This has meant a profit for the private security industry. There has been a growing demand for consulting services and troubleshooting solutions regarding the said security risks at home and abroad.

Furthermore, in the past two years almost every fourth company in Germany fell victim to white-collar crime. Among the big corporations surveyed it was more than half. White-collar crime costs the companies affected by it in Germany over 300,000 euros a year. Every second company in the past two years had a confirmed or suspected case of espionage to report.

These challenges have come to the attention of the government. Both the Ministry of the Interior and the Ministry for Economic Affairs have set up working groups in which the security authorities work together with business representatives on ways of developing economic strategies to protect German companies against industrial espionage and white-collar crime.

## B) CUSTOMER SECURITY REQUIREMENTS

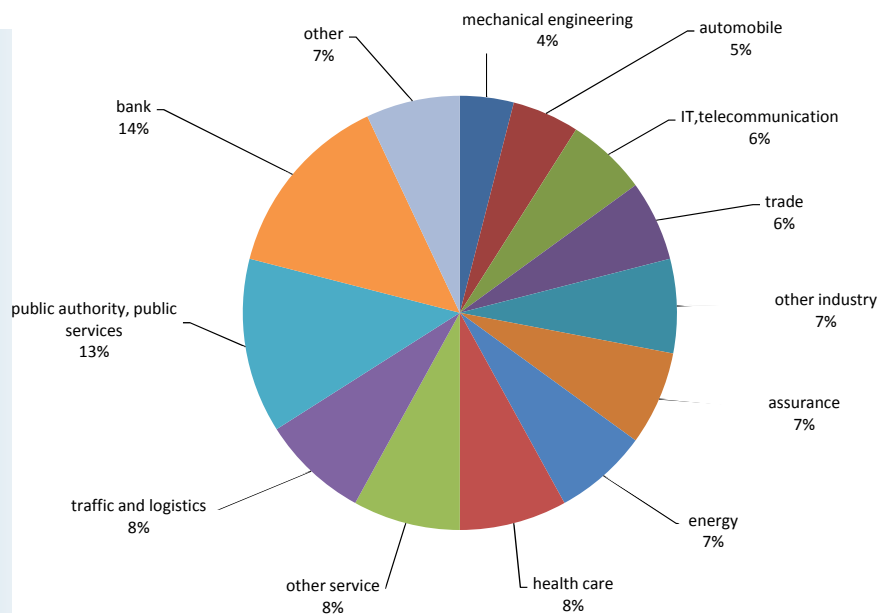
Against this background the security requirements of the state, the municipalities and industry are changing radically. The actual development of the threat level is one aspect, but the assessment and perception of this threat by the customer is at least as important. However, the economic aspects cannot be left out of account either. Companies' own financial resources, the costs of possible security precautions, and the efficiency of state-of-the-art security technology strongly influence customers' security requirements.

In order to ward off threats and risks and minimize damage, a risk analysis must be carried out and a security concept drawn up. DAX companies are increasingly appointing a Corporate Security Officer (CSO). This is not the case with SMEs, who take their business to external consultants or reliable private security companies. The security authorities are also gaining in importance in economic protection. In the media and at conferences they depict and analyse the threats to the economy and present their proposals for defence against such attacks. In Germany the police has crime prevention advice centres that play an important role. They provide objective information about technical security measures free of charge. Prevention bodies at municipal level are the result of a mounting public awareness of the danger.

However, the Association of German Security Industry (Bundesverband der Sicherheitswirtschaft – BDSW) means to open this market to its companies. The economic protection study group keeps its members informed about current challenges. Our members should expand their service range so as to support their customers – especially those that are SMEs – in all areas of corporate security. We expect this to bring about a marked strengthening of performance and hence also a better market positioning of our member companies. The latter have a wide range of customer contacts, especially with SMEs. These should be used as multipliers.



**customer sectors for private security service providers in Germany**



Source: Lünendonk study 2012 "Führende Sicherheitsdienstleister in Deutschland"

### C) TECHNOLOGICAL DEVELOPMENTS

The relentless pace of technical progress makes no exception for the security industry. Security technology is becoming ever more efficient, the innovation cycles ever shorter. This means substantial cost reductions. Video monitoring equipment is becoming more and more sophisticated. Fire safety systems have highly sensitive early warning sensors for detecting smoke emissions and locating fires. In the field of access control the efficiency of biometric recognition techniques is increasing.

Security services and security technology are becoming more closely linked. Without mechanical perimeter protection and video monitoring personal site security is of only limited effectiveness. Video monitoring supports almost every security service. Manufacturing processes and storehouses are secured by structural and technical fire control and explosion prevention backed by patrols. A timely and effective intervention requires the assessment and passing on of the alarm by the emergency and service control rooms. Security technology and security service can thus be selected and coordinated so as to take account of all local, temporal and in-plant conditions. Existing breaches of security can always continue to be closed.

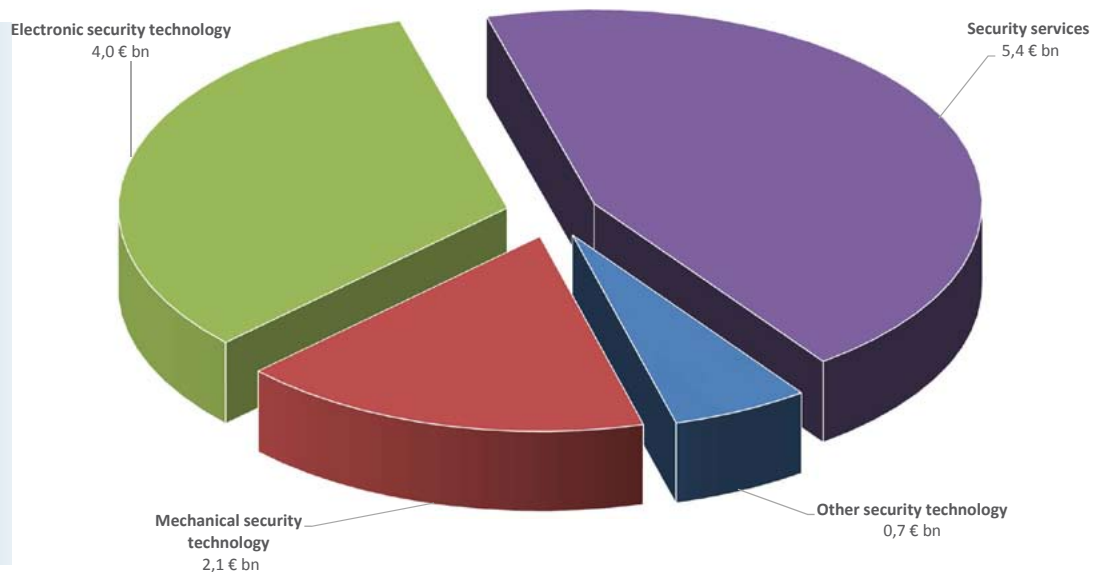
Another challenge facing security companies is deciding whether not to sell security technology but to lease it out to customers instead. Operator models translate into cost savings for customers and reduce the interface. The security provider assumes responsibility for the functioning of the equipment and ensures that his staff are able to operate it.

Customers are increasingly asking for an all-in-one solution. Security technology and security services must be compared and assessed. The all-in-one solution consists of networking mechanical and electronic security technology; video monitoring; image evaluation; sensor technology; alarm; and intervention. Bids are subjected to a cost-effectiveness study before a contract is awarded and executed. The required “security service from a single source”, from the planning stage to the operation of the equipment represents an enormous challenge for security providers. If this challenge is successfully surmounted, it will be an important strategic advantage for well-qualified security companies.

In addition to the security services the security industry also comprises electronic and mechanical security technology. Its total revenues come to around 12 billion euros. The following chart gives the figures for the individual segments.

#### Security market in Germany 2013

Total sales 12,2 € bn



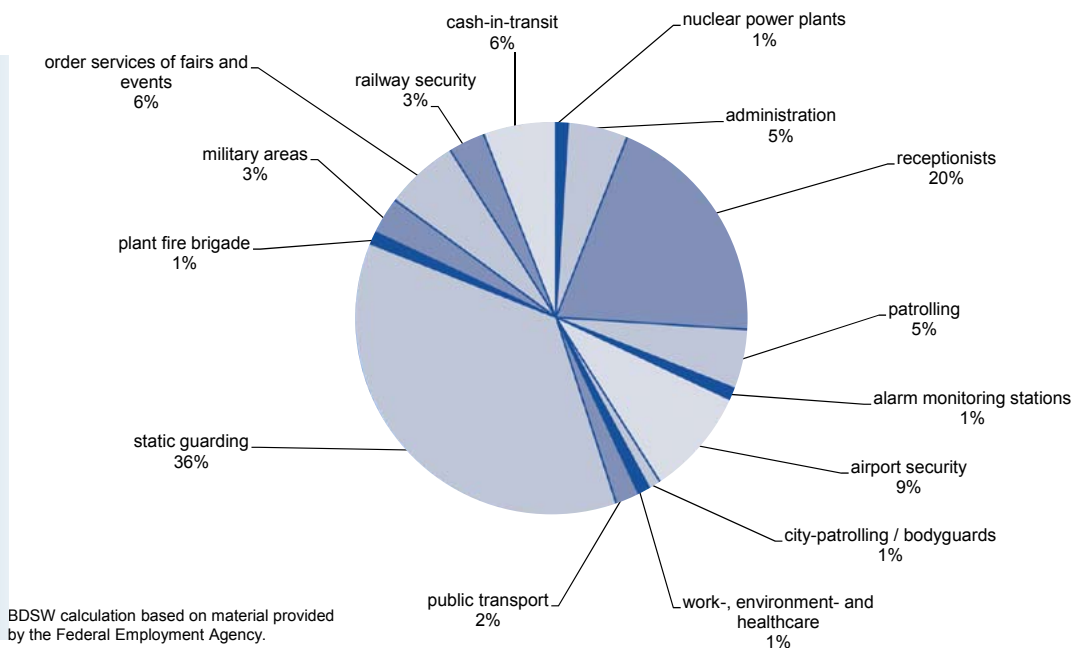
Source: Fair Security Essen 2014 and BDSW calculation

#### D) COSTS OF SECURITY AND NEEDED IMPROVEMENTS IN THE AWARDING OF CONTRACTS

Central and local government agencies tend to be the most thrifty when it comes to awarding contracts for security services and equipment. It is often the cheapest bid that is accepted. Those who suffer most from this are the quality-oriented providers. In contrast to the awarding of public contracts, studies and surveys among private clients in industry show that the financial costs of corporate security show a tendency to rise. It is also noticeable that the replacement of personal services by machinery continues apace. The existing security personnel often have to perform additional duties. The trend towards outsourcing security services continues.

##### 185.101 employees in the German security industry (dated 30.06.2014)

(132.261 factored in the national insurance system)



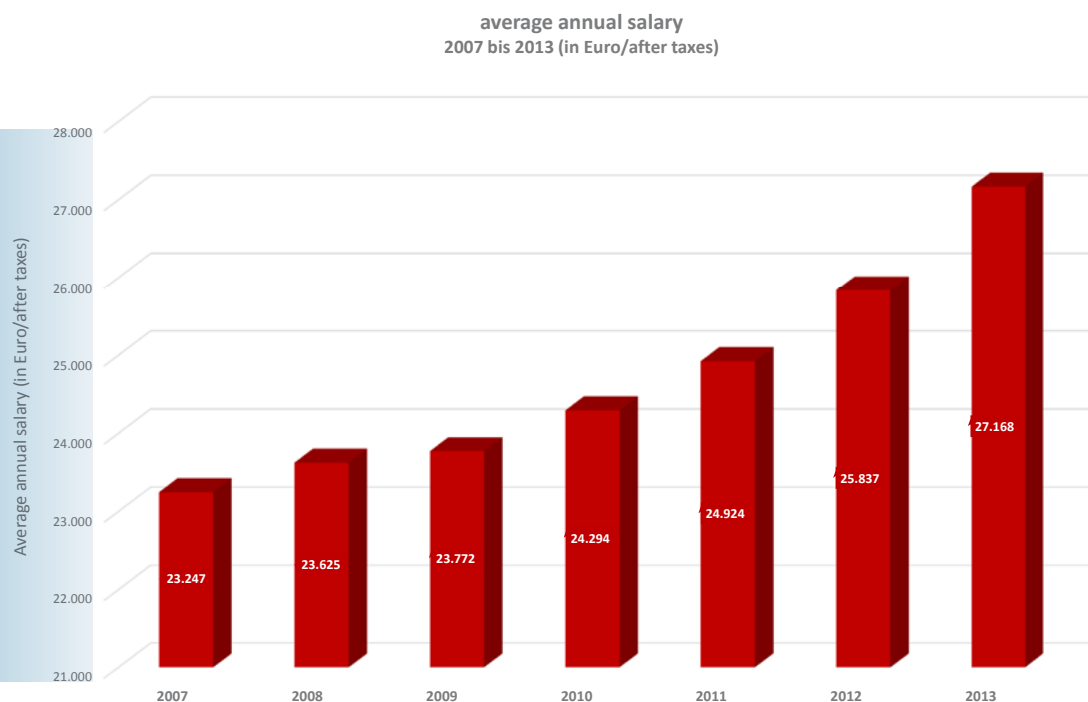
The security industry has introduced a number of measures to improve the quality of training and hence also the quality of security services. However, these measures can only be successful if clients show their appreciation. An important step towards a quality-oriented approach to the awarding of contracts was the “Manual for Organisations Awarding Contracts for Guarding Services” published by the Confederation of European Security Services (CoESS) in association with the European trade unions in 1998. This “Best Value Manual” ([www.securebestvalue.org](http://www.securebestvalue.org)) was also the basis for the development of the German standard DIN 77200 “Static guarding and mobile patrol services – Requirements”. This standard contains transparent and verifiable quality criteria for security services. The first European standards project for security service providers – DIN EN 15602 – which was carried out later, gives an overview of the wide variety of services offered in 11 chapters.

At the 5<sup>th</sup> European Summit on 23 April 2015 in Berlin the CoESS, in association with the European Commission and the trade unions, presented a thoroughly revised version of the European “Best Value Manual”. In doing so the CoESS and its member associations once again proved how important the improvement of the awarding of contracts is to them. DIN 77200 is currently undergoing revision as well. The new edition is expected to give an important boost to improving the system of awarding contracts. However, the aforementioned quality-improving standards can only have an effect if clients are clear about the contents and requirements of their invitation to tender and make use of the tools they are offered.

#### E) WORKING CONDITIONS AND COLLECTIVE BARGAINING POLICY

Private security companies can only operate successfully in the market if the men and women who work for them are competent and motivated. This is where remuneration plays a key role. Collective bargaining policy is a key task of the BDSW. It is regulated in all Germany’s 16 federal states. A total of 70 collective bargaining agreements have been concluded with representatives of over 400 activity-oriented pay brackets. This reflects the wide range of tasks involved. The activities at airports, in nuclear power stations, in plant and site security, at public events, on patrol duty, and in maintaining a presence on public transport etc. are completely different as regards training, the requirements to be met, and the legal framework to be operated in.

Within the last years, the German annual salary rose above average.



Source: Federal Agency of Statistics (Statistisches Bundesamt)

With over 400 pay brackets our collective bargaining policy has ceased to be transparent. This has to be changed. The introduction of the statutory minimum wage of 8,50 € on January 1, 2015, with its effect to our industry, must be taken into account. The wage for simple security tasks should be based on these facts, when adapting existing rates for simple tasks and qualifications.

In recent years wages in many federal states have risen at a disproportionate rate. One result of this is that human labour is replaced by technology. More and more customers are tending to turn to less costly system solutions. Clients who find themselves in a difficult economic situation, cut back their security wants considerably – in some cases orders are cancelled and not replaced.

The BDSW, however, will continue to pursue an independent collective bargaining policy. This, however, assumes the readiness of customers to recognize the efforts of our member companies to offer quality and qualifications worth substantially more than the minimum wage. Security has its price!

## F) DEMOGRAPHIC CHANGE

By 2030 the number of gainfully employed persons in Germany will have declined from its current level of 50 million to about 42 million. This will represent a considerable increase in the already discernible labour shortage. On the basis of the orders on their books, the BDSW member companies could take on about 10,000 new employees.

To meet this challenge successfully the industry must take a wide range of measures. It must markedly increase its attractiveness for current and future workers. Much more emphasis must be given to the indisputably positive aspects of our current activities. These include, for example, the high level of responsibility involved, the flexible deployment times, and the wide variety of activities in many fields. The existing qualifications on offer must be further expanded so as to integrate – for example – unemployed persons and those with fewer qualifications in the industry. More thought must also be given to developing models that make it possible to reconcile the claims of family and career, by offering child care facilities, for example.

The security companies that find themselves competing with other industries on the labour market must reconsider their corporate image. By pursuing a diversified, performance-oriented collective bargaining policy the association must help to recruit qualified workers for the industry. The skilled occupations are an important channel for integrating young people in the security industry. We must keep them in the industry by means of attractive remuneration and working conditions. Just as important is the recruitment of well-qualified career changers.

For over 30 years it has been possible to qualify as a Certified Safety and Security Specialist, a title earned by passing an exam at the Chamber of Commerce and Industry.

However, the recruitment of qualified managerial staff must be stepped up as well. Their significance will continue to increase against the background of changing tasks for the private security companies. Various police academies are offering courses in security management leading to a Bachelor's or Master's degree. Other universities are concentrating on business or technical study specializations. Only with the aid of better trained junior management can demographic and technological change be successfully mastered.

#### G) AMENDMENT OF LEGAL BASIS

Commercial law, with its instruction and statutory examination, is no longer adequate for coping with the complex security duties performed by private security companies nowadays. For decades the BDSW has been pushing for an amendment of the legal bases. Although the interior ministers have realized that the private security companies are an important component of the security architecture in Germany, the necessary conclusions have not yet been drawn.

The aforementioned special statutory regulations for the securing of military property, the protection of nuclear power stations and the security duties at commercial airports must be expanded. Only in this way can the requirements to be met by the efficiency, organisation and accoutrements of the private security providers be regulated exactly like an academic qualification. Special statutory regulations are needed for tasks requiring close cooperation with the police. These include the protection of critical infrastructures, security on public transport, and the securing of large-scale public events.

In summer 2012 the numerous acts of piracy against international shipping caused the German government to permit the use of armed private security companies to bring the problem under control. A compulsory registration procedure was incorporated into commercial law. The company filing the application had to show that the security personnel it was deploying possessed the requisite skills and knowledge and were personally suited and dependable.

### 4. Requirements to be met by the "new security company"

#### A) SECURITY CONCEPT

The security requirements of business customers as well as those in central and local government are undergoing constant change. The reasons for this are complex. The key task of the "new security company" is to adjust to the changing customer requirements and develop a customized all-in-one solution. Such a solution presupposes a security concept along the entire "security chain". The security technology must be included at an earlier stage and ultimately integrated in an all-in-one solution. Meanwhile progress is not standing still. Proficient private security companies are offering their customers deals whereby they assume all responsibility for corporate security.



The changes described can of course only be successfully implemented if the security company commits itself totally to this strategy. This is mainly a matter of

- Weighing up opportunities and risks
- Intensification of technical know-how, the recruitment of technical experts, and the continuing technical education of all staff assigned to the task
- Acquisition of strategic partnerships with security equipment manufacturers and/ or IT companies
- Optimization of the security company's infrastructure
- Measures to overcome shortage of trained staff resulting from demographic trends
- Organisational changes in company

## B) CUSTOMER SPECIALIZATION

Security providers will be less and less able to offer their customers an exclusively personal security services. What is wanted are integrated security solutions that fit in with specific customer interests. This idea is not new, but has rarely been implemented as yet.

At present the security business finds itself in a rapidly spreading “business change”, or paradigm shift. This is increasingly to be observed in marketing activities. In particular, the main tech-savvy, medium-sized security companies are attracting customers by offering to integrate security guard duties, alarm transmission and mobile guard patrol services and technological solutions in order to minimize the cost to the customer. The aim is to establish long-term customer relationships by offering the customer “value added”.

All this is inevitably linked to the aim of improving turnover, profits and shareholder-value. For these aims to be fulfilled in practice, however, a good many preconditions must be met. The consultation, project planning, installation and operation of an integrated security technology in the sense of an all-in-one solution requires the efforts of the management and the security staff deployed at the customer's premises.

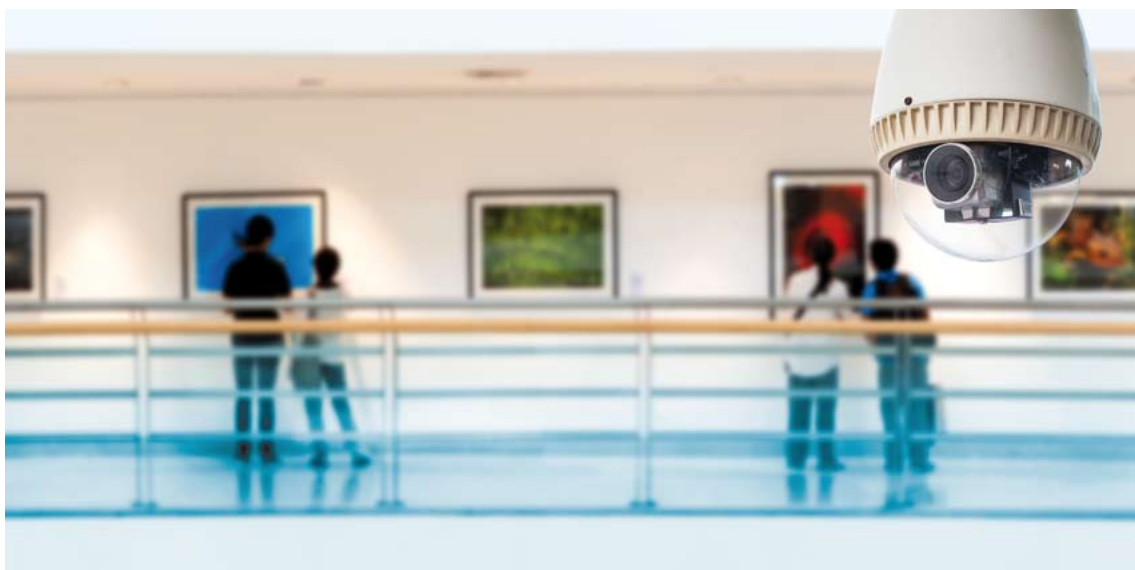
An equally important precondition is an expert knowledge of the security technology being offered. Without a thorough grounding in the relevant technology, the security provider cannot submit either a serious offer of a given technology, nor assess individual systems with regard to their concrete applicability and efficiency, nor integrate the security technology in a customized all-in-one solution. This expert knowledge must either be present in the company itself or procured by going to the market to hire external experts. Naturally the management must be sufficiently familiar with the technology being offered as to be able to weigh the microeconomic opportunities against the risks in a professional manner. It must also be able to assess the commercial effects of integrating security technology into the range of services in a verifiable manner.

However, neither the knowledge of experts nor that of management is enough on its own. For a state-of-the-art service to be successfully sold on the market, the security staff on the spot must also have a sound basic knowledge of security technology. With the introduction of the aforementioned skilled occupations and the career-changer regulation the basic conditions have been created to ensure that staff has the necessary basic knowledge of security technology.

If the necessary technical skills are not available in the company itself, it is time to start thinking about strategic partnerships or the acquisition of security equipment companies. This applies particularly to IT-security technology.

But even the selection of the security technology to be integrated requires a high degree of know-how. Beginning with mechanical security systems, including mechatronics, through state-of-the-art locking systems to burglar-proof and structural and technical fire-prevention systems, the relevant knowledge must be available.

In the meantime there is more and more security technology that is designed to meet the needs of certain industries. The protection of objets d'art in exhibitions and museums must take a different form than the provision of security in public transport. The range of technical possibilities is enormous. At the same time, however, cost/ benefit analyses have to be performed. Not every technology can be used in every field. Depending on local conditions, ultra-modern cameras greatly improve the possibilities of detection, classification and identification. The more efficient the video systems used, the less necessary it is to carry out actual checks. If the arrival and departure of security personnel is rendered unnecessary, costs are reduced.



Riot control forces can be guided to the scene of a disturbance by the emergency and service control room via remote monitoring. Intelligent video monitoring and analysis software can be used to monitor more and more business processes, identify machine downtimes, take climate readings, locate crowd movements and customer behaviour patterns, check warehouse stocks, and introduce appropriate measures on a remote basis. By means of this wide range of measures plant stoppages can be prevented. This makes business processes more efficient and saves costs.

### C) ORGANISATIONAL MEASURES

The digitization and networking of distribution and communication in everyday life and at work, in society, business and government agencies, do not leave the security industry unaffected. The new security company is adapting its infrastructure accordingly. The heart of this development is (and remains) the emergency and service control room that companies have. The European Norm for Monitoring and Alarm Receiving Centres DIN EN 50518 is increasingly recognized as a standard in Germany too. The acceptance procedure is exacting and designed to achieve a completely new quality of security service. However, the investments are not always affordable for many medium-sized companies. For this reason the trend towards specialization will continue. Alarm receiving and processing will remain in the hands of well-funded, high-performance companies, while the riot-control services can be outsourced to regional security companies on the spot.

Finally, the enhanced introduction of security technology and the range of integrated security solutions available will impose lasting changes on the corporate organisation. Larger companies in particular will have to have a Chief Technology Officer (CTO) in future. Another organisational decision to be taken will be whether the service portfolio offered by the security provider will lead to a segmentation by industry. The requirements of the automotive industry are different from those of aviation security, chemicals or engineering. The better a security company knows the business processes and operations as well as all the associated security requirements of an industry and can meet these requirements in the event of landing a contract, the sooner it can be ranked as an industry specialist.

All the signs show that the complexity of corporate security is constantly increasing, particularly as a result of the steady rise in the IT-based control of business processes and the networking of individual functions and procedures. The competence team of the relevant industrial segment in the security company should get to know the way of thinking and the language of the customer's business. The greater the degree of familiarity and insider knowledge about the customer's line of business shown by the security expert and the managers he has sought out for the new task, the greater will be their ability to make a competent impression and argue convincingly in negotiations with the specialist companies.

## 5. Summary and outlook

With a combined staff of around 190,000 employees the private security companies make an important contribution to internal security in Germany. Their importance will continue to grow. The qualifications offensive of the past decade is an important step towards tackling the future challenges successfully. There is an urgent need for a fundamental amendment of the legal framework. The government must make a contribution to this if qualified security providers are to be able to assert themselves successfully on the market in future.

“The new security company” will become a reality faster than many people today expect – and in some cases fear.”

The system of awarding contracts is also due for revision. With the drafting of the “Best Value Manual” at European level and our active involvement in several standards projects, we have created important preconditions for a lasting improvement of the security service.

The permanently shifting threat level changes customers’ security requirements. Security technology is becoming ever more efficient and replacing human service. We must react to these changes if we want to continue asserting ourselves on the market in future. This calls for competent management, comprehensively trained experts, and qualified security personnel at the end of the chain as well. “The new security company” will become a reality faster than many people today expect – and in some cases fear. **The member companies are currently working to meet these challenges. But there will never be a security technology without a good security service. Private security companies will be able to use their market opportunities so long as they continue to be specialist providers!**

Bad Homburg, March 2015

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Friedrich P. Kötter, Dr. Harald Olschok, Reinhard Rupprecht,  
Dr. Berthold Stoppelkamp, Silke Wollmann

**5<sup>th</sup> European Summit on Private Security, Berlin: 22-23 April 2015 (CoESS & BDSW)**

'The new security company: integration of services and technology responding to changes in customer demand, demography and technology'

**4<sup>th</sup> European Summit on Private Security, Madrid: 14-15 March 2013 (CoESS & Aproser)**

'The socio-economic added value of private security services in Europe'

**3<sup>th</sup> European Summit on Private Security, Brussels: 10 December 2010 (CoESS & APEG-BVBO)**

'Private security in Belgium, an inspiration for Europe?'

**2<sup>nd</sup> European Summit on Private Security, Stockholm: 8 December 2009 (CoESS & Almega)**

'Private and public security in the Nordic countries'

**1<sup>st</sup> European Summit on Private Security, Paris: 15 December 2008 (CoESS + INHES)**

'Private Security and its role in European Security'



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