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Germany Homeland Security & Public Safety Market – 2017-2022

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Abstracts

The terror attack in central Berlin, when a large truck ploughed through one of Germany's most hallowed holiday institutions, the Christmas market, killing 12 and injuring dozens, as well as the Paris and Brussels terror attacks coupled with the arrival in Germany of 1.2 million migrants (UN Data), shook the German government, people, homeland security (Heimatsutz) and the intelligence communities. A major upgrade of the German internal security and migration enforcement infrastructure funding is already underway. Based on 6 months of intensive research, interviews and analyses, we forecast that the 2015-2020 market will grow at a CAGR of 16.3%, a 430% hike from the 3.8% CAGR during 2000-2015. 2015 will probably be remembered as a watershed year for Germany's internal security market, with a number of different developments converging to mark a major turning point.

The two-volume* + one "Germany Homeland Security & Public Safety Market – 2017-2022" report is the most comprehensive review of the market available today. It provides a detailed and reasoned roadmap of this growing market.

The report covers the German Homeland Security Immigration Enforcement & Public Safety markets since in most cases, products and services have dual or triple use applications and present the same business opportunities (e.g., biometric modalities are used for the following three sectors: counter-crime, immigration enforcement and counter terror).

Germany Counter Terror, Immigration Enforcement & Public Safety Market is boosted by the following drivers:

Germany, the 4th largest economy in the world with a 2015 GDP of

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approximately $4 trillion, can invest “whatever it takes” to protect its citizens from the looming risks of terror and the surge of migration.

The Paris and Brussels 2015-2016 terror attacks shook Germany unlike any other recent homegrown or ISIS-Da’esh-inspired terrorist attacks since they were complex and well-planned.

Germany is facing problems with a far greater impact than its economic ones. ISIS terror threats coupled with the surge in entry of 1.2 million migrants are alarming facts, and show no signs of abating. Present measures are simply not working. A major nation-wide overhaul of the internal security infrastructure and strategy is essential.

Terrorist attacks elsewhere in Europe are gradually leading Germany to rethink its liberal attitude towards aggressive security and surveillance policies, rooted in its historical experiences of totalitarian Nazism and Communism.

Unlike other countries, Germany cannot use its armed forces in order to increase readiness domestically due to constitutional prohibitions. That leaves Germany’s police as the first and last line of defense and response to any terror attack. However, they are simply not equipped for the challenge.

With a number of different converging developments, 2015-2016 will probably be remembered as watershed years for Germany’s internal security market.

According to the German Domestic Intelligence Agency (BFV), Germany has about 8,650 ultra-conservative Salafist Muslims. At least 800 young people (60% of whom are German passport holders) have left to fight in Syria, of which around 260 have returned. In all, security services estimate that about 500 potentially dangerous Islamist radicals currently live in the country.

Since the year 2001, 11 attacks on German targets by radical Islamists were thwarted.

In April 2016 ISIS has called for German Muslims to specifically target Chancellor Angela Merkel’s office in Berlin and to attack the Cologne-Bonn airport.

The German market for security & safety products is sophisticated and well

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served. Even with a preference for locally manufactured products, foreign products can usually strongly compete on the basis of price and performance. They do not encounter any direct trade barriers or quotas. Non-tariff, indirect trade barriers may be the approval process of dual use goods, which include many security market products.

This report is a resource for executives with interests in the German market. It has been explicitly customized for the security industry and government decision-makers in order to enable them to identify business opportunities, developing technologies, market trends and risks, as well as to benchmark business plans.

Questions answered in this 489-page, segmented by 54 submarkets two-volume + one* report include:

What will the market size and trends be during 2016-2022?

Which submarkets provide attractive business opportunities?

Who are the decision-makers?

What drives the German Homeland Security & Public Safety managers to purchase solutions and services?

What are the customers looking for?

What are the technology & services trends?

What is the market SWOT (Strengths, Weaknesses, Opportunities & Threats)?

What are the challenges to market penetration & growth?

With 489 pages, 66 tables and 156 figures, this 2-volume + one* report covers 9 vertical, 9 technology and 3 revenue source submarkets, offering for each of them 2015 data and assessments, and 2016-2022 forecasts and analyses.

* The ” Global Homeland Security & Public Safety Industry – 2016 Edition” report is a free of charge Bonus for multi-reader license customers and is offered at half price to

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single-reader customers.

Why Buy this Report?

A. Market data is analyzed via 3 independent perspectives:

With a highly fragmented Homeland Security & Public Safety market we address the “money trail” – each dollar spent – via the following 3 viewpoints:

By 9 Vertical Markets including:

- Airport Security
- Smart Borders, Immigration Enforcement & Border Security
- Intelligence Agencies
- Critical Infrastructure Protection
- Police Modernization & Other 1st Responders
- Public Events & Safe City
- Building & Perimeter Security
- CBRN Security & Safety
- Other Vertical Markets(including: Maritime Security, Mass Transportation Security and Oil-Gas Industry Security)

By 3 Revenue Sources including:

- Products Sales
- Maintenance & Service, Upgrades, Refurbishment
- Planning, Training and Consulting

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By 9 Technology Markets including:

- Cybersecurity
- Counter Terror & Crime IT
- Communication Systems & Devices
- Biometrics
- Video Surveillance Technologies
- Intrusion Detection Systems
- Border & Perimeter Security Technologies
- Explosives & Weapons Detection Technologies
- Other Technologies (including: C2/C4ISR Systems, NLW, Counter IED, Personal Protective Gear and more)

B. Detailed market analysis frameworks for each of the market sectors, including:

- Market drivers & inhibitors
- Business opportunities
- SWOT analysis
- Competitive analysis
- Business environment
- The 2015-2022 market segmented by 54 submarkets

C. This is the only report that addresses the Homeland Security & Public Safety dual-use markets:

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73% of the German market revenues derive from dual-use products. For example, cybersecurity systems are used to address both cyber-crime and cyber-terror. Decision-makers forming their strategy need a complete view of this overlapping market both independently and in their intersections.

D. The report includes the following 5 appendices:

Appendix A: Germany Counter Terror & Public Safety Agencies

Appendix B: European Security Related Product Standards

Appendix C: The European Union Challenges and Outlook

Appendix D: The European Migration Crisis

Appendix E: Abbreviations

E. The report addresses over 90 technologies including:

Access Control Systems

Automated Border Control (ABC) Gates

Backscatter X-Ray Container-Vehicle Screening Systems

Bio-Agents & Infectious Disease Detection

Biometrics

Biosecurity and Biosafety Devices & Systems

Bio-Terror & Infectious Disease Early Alert System Devices & Systems

Boarding Gate Explosives Scanners

Border & Perimeter Barriers

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C2/C4ISR Systems

Capacitance Sensors Fence

CBRN and Hazmat Personal Protective Gear

Cell Broadcast Mass Emergency Notification

Chemical Agent Detection

Chemical, HAZMAT & Nuclear Detection

Coherent Scatter 2D X-Ray Systems

Communication Systems & Devices

Cybersecurity

Decontamination of CBRN & HAZMAT Incidents

Desktop ETD Devices

Dual Energy LINAC X-Ray Container-Vehicle Screening Systems

Dual-View LINAC X-Ray Container-Vehicle Screening Systems

Dumb Fences

Electronic Fencing

Emergency Management IT Systems

Emergency Medical Services (EMS) Devices & Systems

E-Passports

Fiber Optic Fence

Gamma Ray Systems Container-Vehicle Screening Systems

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Hand Held Metal Detectors

Handheld ETD Devices

Homeland Security & Public Safety IT Systems

Human Portable Radiation Detection Systems (HPRDS)

Hybrid Tomographic EDS & 2D X-Ray Screening

IED Placement Detection

Infrastructure as a Service (IaaS) IT

Intelligence Community Big Data IT

Intelligence Community Cloud Infrastructure IT

Intelligence Community Software as a Service (SaaS)

Intelligence Services IT

Interoperable Communication Systems

Intrusion Detection Systems

Ion Mobility Spectroscopy (IMS)

Liquid Explosives Detection Devices

Luggage, Baggage & Mail Screening Systems

Maritime Awareness Global Network (MAGNET)

Mass Emergency Notification Devices & Systems

Metal detection Portals

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Multimodal Biometric Systems

Narcotics Trace Detection Devices

Natural & Manmade Disaster Early Warning systems

Non-Lethal Weapons(NLW)

Nuclear/Radiological Detection Devices & Systems

Other Security Technologies

People Screening MMWave (AIT) Portals

People Screening X-Ray Backscatter (AIT) Portals

Perimeter Security Technologies

Personal (Ballistic & CBRNE) Protective Gear

Personal Body Armor

Platform as a Service (PaaS)

Police Modernization Systems and Devices

Ported Coax Buried Line Fence

Rescue & Recovery Equipment

Respiratory Protective Equipment

Satellite Based Maritime Tracking

Shoe Scanners

Siren Systems

SkyBitz Global Locating System

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Standoff Explosives & Weapon Detection Systems

Standoff Suicide Bombers Detection

Strain Sensitive Cables Fence

Suicide Bombers Borne IED (PBIED) Detectors

Suicide Bombers Detonation Neutralization

Taut Wire Fence

Text Alert Systems

The Advanced Spectroscopic Portals (ASP)

Tomographic Explosive Detection Systems (EDS)

Transportable X-Ray Screening Checkpoints

VBIED Detonation Neutralization

Vehicle & Container Screening Systems

Vehicle Borne IED (VBIED) Detectors

Vehicle Screening ETD Systems

Vibration Sensors Mounted on Fence

Video Analytics

Video Surveillance

Visa & Passport related IT

Voice Alert Systems

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Wide Area Communications and Tracking Technology

X-Ray Container-Vehicle Screening Systems

X-ray Screening systems

F. The report addresses over 300 European Homeland Security and Public Safety standards (including links)

G. The report provides the number of passengers and number of screened cabin & checked-in baggage and luggage at each of the major airports by 2016 & 2020

H. The supplementary* ” Global Homeland Security & Public Safety Industry – 2016 Edition” report (updated in May 2016) provides the following insights and analyses of the industry including:

The Global Industry 2016 status

Effects of Emerging Technologies on the Industry

The Market Trends

Vendor – Government Relationship

Geopolitical Outlook 2016-2022

The Industry Business Models & Strategies

Market Entry Challenges

The Industry: Supply-Side & Demand-Side Analysis

Market Entry Strategies

Price Elasticity

Past Mergers & Acquisitions (M&A) Events

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I. The supplementary* ” Global Homeland Security & Public Safety Industry – 2016 Edition” report provides an updated (May 2016) and extensive information (including Company Profile, Recent Annual Revenues, Key Executives, Homeland Security and Public Safety Products, and Contact Info.) on the 119 leading Vendors in the industry, namely:

3M

3i-MIND

3VR

3xLOGIC

ABB

Accenture

ACTi Corporation

ADT Security Services

AeroVironment Inc.

Agent Video Intelligence

Airbus Defence and Space

Alcatel-Lucent (Nokia Group)

ALPHAOPEN

American Science & Engineering Inc.

Anixter

Aralia Systems

AT&T Inc.

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Augusta Systems

Austal

Avigilon Corporation

Aware

Axis

AxxonSoft

Ayonix

BAE Systems

BioEnable Technologies Pvt Ltd

BioLink Solutions

Boeing

Bollinger Shipyards, Inc

Bosch Security Systems

Bruker Corporation

BT

Camero

Cassidian

CelPlan

China Security & Surveillance, Inc.

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Cisco Systems

Citilog

Cognitec Systems GmbH

Computer Network Limited (CNL)

Computer Sciences Corporation

CrossMatch

Diebold

DRS Technologies Inc.

DVTel

Elbit Systems Ltd.

Elsag Datamat

Emerson Electric

Ericsson

ESRI

FaceFirst

Finmeccanica SpA

Firetide

Fulcrum Biometrics LLC

G4S

General Atomics Aeronautical Systems Inc.

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General Dynamics Corporation

Getac Technology Corporation

Hanwha Techwin

Harris Corporation

Hewlett Packard Enterprise

Hexagon AB

Honeywell International Inc.

Huawei Technologies Co., Ltd

IBM

IndigoVision

Intel Security

IntuVision Inc

iOmniscient

IPConfigure

IPS Intelligent Video Analytics

Iris ID Systems, Inc.

IriTech Inc.

Israel Aerospace Industries Ltd.

ISS

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L-3 Security & Detection Systems

Leidos, Inc.

Lockheed Martin Corporation

MACROSCOP

MDS

Mer group

Milestone Systems A/S

Mirasys

Motorola Solutions, Inc.

National Instruments

NEC Corporation

NICE Systems

Northrop Grumman Corporation

Nuance Communications, Inc.

ObjectVideo

Panasonic Corporation

Pelco

Pivot3

Proximex

QinetiQ Limited

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Rapiscan Systems, Inc.

Raytheon

Rockwell Collins, Inc.

Safran S.A.

Salient Sciences

Schneider Electric

SeeTec

Siemens

Smart China (Holdings) Limited

Smiths Detection Inc.

Sony Corp.

Speech Technology Center

Suprema Inc.

Synectics Plc

Tandu Technologies & Security Systems Ltd

Texas Instruments

Textron Inc.

Thales Group

Total Recall

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Unisys Corporation

Verint

Vialogy LLC

Vigilant Technology

Zhejiang Dahua Technology

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