

# UK Homeland Security & Public Safety Market – 2017-2022

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## Abstracts

The UK is facing security problems with a far greater reach than its economic ones. ISIS terror threats are alarming and show no signs of declining.

The present UK security measures, which have been effective in the past, cannot meet the 21st century ISIS-inspired terror tactics (following 5 years of security agencies' budget and personnel cuts). A revision of the UK security infrastructure and funding is already underway.

The transformation of the UK security infrastructure and HLS budgets is best expressed in the words of David Cameron, UK Prime Minister, in the aftermath of the Brussels carnage: "They could just as well be attacks in Britain or in France or Germany, or elsewhere in Europe and we need to stand together against these appalling terrorists and make sure they can never win".

Following a 5-year CAGR of 2-3%, this UK Homeland Security Market research forecasts a 4-fold increase in the 2015-2020 market, at a CAGR of 11.3% .

The two-volume (\*) + one "UK Homeland Security & Public Safety Market – 2016-2022" report is the most comprehensive review of the UK HLS market available today. It provides a detailed and reasoned roadmap of this growing market.

The UK Security Market Forecast covers the 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).

The UK Homeland security market is set to undergo a major transformation from 2016-2022 through the following drivers:

According to the British intelligence organizations (March 2016), at least 800 people from the UK have traveled to support or fight for jihadist organizations in Syria and Iraq. Approximately 400 have since returned to the UK. A further 600 British citizens have been caught trying to join ISIS.

The 2015 Paris, and the March 2016 Brussels terrorist attacks have focused greater attention on the threats posed by international terrorists and acted as a spur for UK authorities to enhance emergency planning and response capabilities.

UK, the 5th largest economy in the world with a 2015 GDP of approximately \$2.9 trillion, can invest “whatever it takes” to protect its citizens from the looming risks of terrorism and immigration.

While the UK has a tradition of quite effective coordination among its competing counter terror and public safety agencies, some inter-agencies coordination problems are an obstacle to harmonized efforts to carry out the country counter terror and public safety missions. This phenomenon increases the national markets due to duplication of purchased systems.

The UK market for security & safety products is sophisticated and well served. Local defense and security companies are well entrenched in the UK security market. Even with a preference for locally manufactured products, foreign products can usually strongly compete on the basis of price and innovation. 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 UK Homeland security industry. It has been explicitly customized for the security industry and government decision-makers in order to identify business opportunities, developing technologies, market trends and risks, as well as to benchmark business plans.

Questions answered in this 485-page two-volume + one (\*) market report include:

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

Which submarkets provide attractive business opportunities?

Who are the decision-makers?

What drives the UK 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 and Threats)?

What are the challenges to market penetration & growth?

With 485 Pages, 65 Tables and 151 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 single-reader customers.

Why Buy this Report?

A. This is the only report that addresses the HLS & Public Safety dual-use markets:

76% of the UK market revenues emanate 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.

B. Market data is analyzed via 3 key perspectives:

With a highly fragmented HLS & 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

By 3 Revenue Sources including:

Products Sales

Maintenance & Service, Upgrades, Refurbishment

Planning, Training and Consulting

By 8 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

C. 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 51 submarkets

D. The UK homeland security and public safety market report includes the following 5 appendices:

Appendix A: UK 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 UK HLS market 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

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

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

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

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

Wide Area Communications and Tracking Technology

X-Ray Container-Vehicle Screening Systems

X-ray Screening systems

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

G. The UK HLS Market analysis 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 and Public Safety Industry – 2016 Edition" report (updated by May 2016) provides the following insights and analysis 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

I. The supplementary (\*) “Global Homeland Security and Public Safety Industry – 2016 Edition” report provides 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.

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.

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.

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

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

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

Unisys Corporation

Verint

Vialogy LLC

Vigilant Technology

Zhejiang Dahua Technology

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