

# The Infrastructure Security Market 2012-2022: Government Spending for Homeland Security (HLS)

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## Abstracts

The infrastructure security market has rapidly developed over the past decade, with the formation of a host of governmental and international organisations dedicated to homeland security (HLS) and critical infrastructure protection. The major threats to infrastructure are not expected to diminish, whilst the construction of infrastructure itself will expand significantly during the forecast period. Visiongain analysis has indicated that the global infrastructure security market, in terms of government spending, will reach a value of \$32.55bn in 2012.

Visiongain's report considers infrastructure security in terms of government spending directed towards protecting the physical integrity of a nation's vital assets from terrorist attack, criminal damage and theft, alongside environmental destruction. Infrastructure included in the report includes rail & bus networks, utilities, power stations, energy infrastructure and major events such as the Olympic Games.

Whilst in some of these cases funding for cyber security seems paramount, this protection has little utility by itself unless the physical integrity of the infrastructure is also appropriately safeguarded. Investment and innovation will continue in equipment and services such as IP surveillance cameras, sensor systems, perimeter fencing and biometric access control.

Visiongain expects an increase in integration of systems and the provision of end-to-end systems. Furthermore, advances in miniaturisation of technology and reductions in unit cost will permit existing solutions to be made more applicable to a wider array of security environments.

National infrastructure markets in North America and major European countries will

remain leading national markets in the infrastructure security market over the forecast period 2012-2022. Although visiongain does not expect significant growth as a consequence of continued recession and fiscal austerity, infrastructure protection will continue to be prioritised as part of security spending. Growth within Asian infrastructure security markets such as China and India, alongside the Middle East, is forecast by visiongain to be very strong, driven by high economic reliance on vital infrastructure, pressing internal security concerns, and expansion of oil & gas fields. In the longer term, the market will take an ever more global complexion, with higher growth levels in Latin America, Africa and Central Asia.

The report contains 143 tables, charts and graphs that add visual analysis in order to explain developing trends within the infrastructure security market. Visiongain provides forecasts for the period 2012-2022 in terms of value (US\$) for the global infrastructure security market in terms of government spending, as well as for 4 submarkets of the infrastructure security market (infrastructure security electronics, infrastructure perimeter security, infrastructure security services and environmental infrastructure security). In addition, 16 leading national infrastructure security markets are forecast and analysed by Visiongain over the period 2012-2022, alongside a 'rest of the world' forecast and summary. The report also provides profiles of 40 leading companies operating within the market, and includes 2 exclusive interviews with companies involved in infrastructure security, providing expert insight alongside visiongain analysis.

### **Unique Selling Points**

You will gain a thorough understanding of the infrastructure security market and learn how it will evolve over the next decade, with detailed global sales forecasts from 2012 to 2022.

You will receive national sales forecasts from the 16 largest infrastructure security markets for 2012-2022, and gain insight into the specific market drivers and restraints in each national market.

You will also receive sales forecasts and analysis for four submarkets within the global infrastructure security market:

The forecasts and analysis are underpinned by extensive expert consultation. Transcripts of two original interviews are included within the report with expert insight from:

You will be able to study 143 tables, charts and graphs quantifying the infrastructure security market in detail over the period 2012-2022.

You will gain knowledge of who the leading players are within the infrastructure security marketplace.

You will receive a SWOT analysis for strengths, weaknesses, opportunities and threats to the infrastructure security market from 2012 onwards.

You will be able to compare the various forms of infrastructure security and discover how they can be applied to electricity grids and read our analysis of which energy storage technology is likely to prevail.

## **Methodology**

This report has been compiled by combining information obtained from a very wide and rich mixture of primary and secondary research sources, producing a broad industry overview. Visiongain sought opinions from leading figures in the infrastructure security market to underpin the analysis of market drivers and restraints. The study draws on a diverse range of official corporate and governmental announcements, media reports, policy documents, industry statements and expert opinion as a basis for discussing and predicting developments in the infrastructure security market between 2012 and 2022.

Visiongain considers that this methodology results in an accurate, objective mixture of analyses and forecasts.

Why you should buy *The Infrastructure Security Market 2012-2022: Government Spending for Homeland Security (HLS)*

You will receive a comprehensive analysis of the infrastructure security market from 2012-2022

The analysis and forecasting has been informed by extensive expert consultation with industry leaders. Within the report, you will be able to read full transcripts of interviews from 2 leading companies involved within the infrastructure security market.

Verint Systems, a major turnkey surveillance and analytics provider

Sentry360, among the world's fastest growing IP surveillance camera manufacturers

You will find 143 tables, charts, and graphs that quantify, analyse and forecast the infrastructure security market from 2012-2022

You will receive forecasts and analysis of the global infrastructure security market between 2012-2022

You will find forecasts and analysis of 4 infrastructure security submarkets over the period 2012-2022

Security electronics

Perimeter security

Services

Environmental security

You will be presented with forecasts for the 16 leading national infrastructure security markets, as well as rest of the world figures and projections for the period 2012-2022

US

Canada

UK

Germany

France

Italy

Russia

Saudi Arabia

UAE

Qatar

Iraq

Japan

China

India

Brazil

Mexico

Rest of the World (RoW)

You will receive a SWOT analysis that examines the infrastructure security market from 2012-2022

You will gain profiles of 40 of the leading companies operating within the infrastructure security market

### **What is the structure of the report?**

Chapter 1 is the executive summary.

Chapter 2 is an introduction to the infrastructure security market providing a clear overview and definition of the market and its characteristics.

Chapter 3 provides extensive analysis of the global infrastructure security market with detailed forecasts from 2012-2022

Chapter 4 analyses the 4 major submarkets of the infrastructure security market with forecasts provided from 2012-2022

Chapter 5 provides details of 16 leading national markets within the infrastructure

security market, with forecasts provided for 2012-2022 alongside a rest of the world forecast and summary

Chapter 6 provides a SWOT analysis of the key strengths, weaknesses, opportunities and threats that are acting as drivers and restraints upon the infrastructure security market

Chapter 7 features 2 original interviews with industry experts, Verint Systems and Sentry360 who offer an insider's perspective on the infrastructure security market.

Chapter 8 lays out profiles of 40 of the leading companies operating in the infrastructure security market.

Chapter 9 provides a summary of the report, outlining the main conclusions of the analyses.

Chapter 10 provides a glossary

### **You can order this report today**

Anybody with an interest in the infrastructure security market should gain valuable information and insight from this new study by visiongain, which analyses one of the most important aspects of the homeland security market. Infrastructure security product / services offer substantial business and investment opportunities and are becoming an increasingly important component of the infrastructure security market in several key regional markets.

This visiongain infrastructure security report will be valuable both to those already involved in the infrastructure security market and those wishing to enter the market in the future. Gain an understanding of how to tap into the potential of this market by ordering *The Infrastructure Security Market 2012-2022: Government Spending for Homeland Security (HLS)*

Visiongain is a trading partner with the US Federal Government  
CCR Ref number: KD4R6

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## **COMPANIES LISTED**

A&M

Abu Dhabi National Oil Company (ADNOC)

Accenture

Accenture Federal Services

Advance Security

Advanced Perimeter Services Ltd (APS)

Aegis Defence Services Limited

Airtel Networks Nigeria

Amtrak (US National Railroad Passenger Corporation)

Anadarko

ANP Technologies Inc

Areva  
ATG Access  
BAE Infratection Solutions  
BAE Systems  
BAE-Composite Solutions  
Bell  
Beretta Defence Technologies  
Boeing Company  
Boeing Defence and Security  
Booz Allen Hamilton (BAH)  
British Nuclear Fuels  
C4 Advanced Solutions  
Camber Corporation  
Cantronic  
Carlyle Group  
Cassidian  
Cassidian Communications  
Cassidian North America  
Chesapeake Energy  
China Security and Surveillance Technology (CSST)  
Chinese National Petroleum Corporation  
Chubb Fire and Security  
Chubu Electric Power Company  
Cisco Systems Inc  
Clayton International  
Composite Technologies Inc  
Comvest Investment Partners  
Control Risks  
Cross Match Technologies  
CSECO  
Cubic Security Systems  
Delhi Metro Rail Corporation  
Delta Security  
Deutsche Bahn (DB)  
DEX Security Solutions  
DRS Technologies  
Dutch Rail  
DynCorp International  
Easynet

Elbit Security Systems (ELSEC)  
Elbit Systems  
Electricit? de France (EDF)  
EISight Ltd  
Embraer  
Emirates Advanced Investments (EAI)  
Emirjae Systems  
EnCana Corporation  
Era Infra Engineering Ltd  
European Aeronautics, Defence and Security Company (EADS)  
Ex-Eye  
ExxonMobil  
Finmeccanica SpA  
Fluor Corporation  
FutureSentry  
G4S  
G4S Secure Solutions  
Galliford Try  
Garda World Security Corporation  
Gazprom  
General Dynamics Advanced Information Systems (GDC4S)  
General Dynamics Corporation (GD)  
General Dynamics United Kingdom (GDUK)  
General Electric (GE)  
General Electric Homeland Protection  
General Electric Security  
Gyrocam Systems LLC  
Harris Corporation  
Harris RF Communications  
Hewlett-Packard (HP)  
Hexagon AB  
Hitachi Kokusai Electric  
Honeywell International Inc  
Honeywell Security Group  
Honeywell Vindicator Technologies  
ICF International  
Impact Sciences Corporation  
Implant Sciences Corporation  
Indian Railways (IR)

Intergraph  
Intergraph Government Solutions  
Intergraph Security, Government & Infrastructure (SG&I)  
International Business Machines Corporation (IBM)  
International Golden Group (IGG)  
Ioimage  
Iraq Drilling Company  
Iris ID  
Irkut Corporation  
Israel National Roads Company  
Johnson Controls  
Kentz Corporation Ltd  
Korea Power Engineering Company Inc  
Kratos Defense & Security Solutions  
Kroll Security  
L-1 Identity Solutions Inc  
L-3 Communications  
LG Corp  
Lockheed Martin Corporation  
Lukoil  
Magal S3  
Magal Security Systems  
Magna BSP  
Mirion Technologies  
Mitsubishi Electric  
Morpho  
MorphoTrust  
Motorola Solutions  
NICE Systems Ltd  
North American Science and Engineering Company  
Northrop Grumman Corporation  
Olive Group  
Panasonic  
Petroleo Brasileiro (Petrobras)  
Petroleos Mexicanos (Pemex)  
Power Training  
Qatari Petroleum  
QinetiQ  
Quintron

Rafael Advanced Systems  
Rapsican Systems  
Raytheon Company  
RCM Solutions Inc  
Reflex Responses  
Rightmark Holdings Ltd  
Rontal Engineering Applications  
Rosneft  
Safran Group  
Saudi Aramco  
Science Applications International Corporation (SAIC)  
Securitas AB  
SELEX Communications  
Senceive  
Sentry360  
Shell Oil Company  
Siemens AG  
Siemens Building Technologies  
Smiths Detection  
Smiths Group  
South Oil Company  
Sun Surveillance  
Tawazun  
Team Camber Texas  
TEEX Public Safety & Security  
Terex Corporation  
Thales Australia  
Thales Canada  
Thales Group  
Thales SHIELD  
Transneft  
Triple Canopy  
United Technologies Corporation (UTC)  
United Technologies Corporation Bahrain S.p.c.  
United Technologies Corporation Fire and Security Group (UTC F&S)  
Verint Systems Inc  
Westfield Group

**GOVERNMENT AGENCIES AND OTHER ORGANISATIONS MENTIONED IN THIS**



## REPORT

Abu Dhabi Police GHQ  
Abu Dhabi University  
al-Qaeda (AQ)  
al-Qaeda in the Arabian Peninsular (AQAP)  
American Public Transport Association (APTA)  
American Water Works Association (AWWA)  
Boko Haram  
Brazilian Federal Police  
Brazilian Special Police (BOPE)  
Brazilian Special Secretariat for the Security of Large Events  
British Transport Police  
Canadian DND (Department of National Defence)  
Chinese Ministry of Civil Affairs  
Chinese Ministry of Public Security (MPS)  
Chinese People's Liberation Army (PLA)  
Chinese State Disaster Relief Commissions  
Commonwealth Games  
Commonwealth of Independent States (CIS)  
Development Bank of Japan  
DHS Office of Intelligence, Analysis and Operations  
Doha 2020 Olympic Games Bid  
Dubai Civil Defence Department (DCD)  
Dubai Metro  
Dubai Transport Police  
East Turkestan Islamic Movement (ETIM)  
Edgewood Chemical Biological Center (ECBC)  
European Commission  
European Critical Infrastructure Warning Information Network (CIWINN)  
European Programme for Critical Infrastructure Protection (EPCIP)  
European Union (EU)  
Fédération Internationale de Football Association (FIFA)  
French Direction Central du Renseignement Interieur (DCRI)  
French Ministry of the Interior  
French Nuclear Safety Authority (ASN)  
German Disaster Relief Organisation  
German Federal Criminal Police Office  
German Federal Interior Ministry (BMI)



German Federal Office for Civil Protection and Disaster Response  
German Federal Police  
Gulf Cooperation Council (GCC)  
Hezbollah  
Indian Assam Rifles Regiment  
Indian Central Industrial Security Force (CSIF)  
Indian Central Reserve Police Force (CRPF)  
Indian Defence Research and Development Organisation (DRDO)  
Indian Ministry of Defence (MoD)  
Indian Ministry of Home Affairs (MHS)  
Indian Ministry of Homeland Security  
Indian National Investigation Agency  
Indian Railway Protection Force (RPF)  
International Assistance Force (ISAF)  
International Computer Security Organisation (ICSA) Foundation  
International Journal of Critical Infrastructure Protection  
International Olympic Committee (IOC)  
International Security and National Resilience Exhibition and Conference (ISNR)  
Iraqi Ministry of the Interior  
Iraqi Oil Protection Force (OPF)  
Israeli Defence Force (IDF)  
Israeli Ministry of National Infrastructure  
Italian Carabinieri  
Italian Civil Defence Authority  
Italian Military Intelligence and Security Service (SISMI)  
Italian Ministry of the Interior  
Japanese Self Defence Forces (JSDF)  
Kurdish Workers Party (PKK)  
Lashkar-e-Taiba (LeT)  
London Organising Committee of the Olympic Games (Locog)  
Los Alamos National Laboratory  
Los Zetas  
Massachusetts Office of International Trade & Investment (MOTI)  
Movement for the Emancipation of the Niger Delta (MEND)  
NATO-Russia Council  
New York and New Jersey Port Authority (NYNJPA)  
New York City Metropolitan Transit Authority  
New York Police Department (NYPD)  
North American Electric Reliability Corporation (NERC)

North Atlantic Treaty Organisation (NATO)  
Provisional Irish Republican Army (PIRA)  
Qatari Internal Security Force (ISF)  
Qatari Oil Fields Project Development (OPD)  
Queensland Police Service  
Royal United Services Institute (RUSI)  
Russian Federal Agency for Government Communications and Intelligence (FAPSI)  
Russian Federal Security Service (FSB)  
Russian Ministry of Internal Affairs  
Russian Security Council  
Saudi Arabian Joint Commission on Critical Infrastructure Protection and Border Security (JCCIP)  
Saudi Arabian National Guard (SANG)  
Sinaloa Cartel  
Transport for London (TfL)  
UAE Armed Forces  
UAE Critical National Infrastructure Authority (CNIA)  
UAE Ministry of the Interior  
UK Audit and Review of Olympic and Paralympic Safety  
UK Centre for Protection of National Infrastructure (CPNI)  
UK Department for Transport (DfT)  
UK Environment Agency  
UK Home Office  
UK Home Office  
UK Joint Terrorism Analysis Centre (JTAC)  
UK Secret Intelligence Service (SIS/Mi6)  
UK Security Service (Mi5)  
Unique Identification Authority of India (UIDAI)  
United Liberation Front of Asom (ULFA)  
United Nations (UN)  
University of Southern California (USC)  
US Army Chief Materials Agency (CMA)  
US Army Research, Development and Engineering Command  
US Bureau of Reclamation  
US Congress  
US Defense Advance Research Projects Agency (DARPA)  
US Department of Defense (DoD)  
US Department of Energy (DoE)  
US Department of Energy Petroleum Stores

US Department of Health and Human Services (HHS)  
US Department of Homeland Security (DHS)  
US Department of State  
US Domestic Nuclear Detection Office (DNDO)  
US Electricity Sector Information Sharing and Analysis Center  
US Energy Information Administration (EIA)  
US Environmental Protection Agency (EPA)  
US Federal Bureau of Investigation (FBI)  
US Federal Emergency Management Agency (FEMA)  
US First Responder Network Authority (Firstnet)  
US Joint Program Executive Office for Chemical and Biological Defense (JPEOCBD)  
US National Bio and Agro Defense Facility (NBAF)  
US National Flood Insurance Program (NFIP)  
US National Protection and Programs Directorate (NPPD)  
US National Protection and Programs Directorate Office of Infrastructure Protection  
US Office of Emergency Management  
US Pentagon  
US Senate  
US Special Forces  
US Transportation Security Administration (TSA)  
Wikileaks  
World Bank

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