



Confederation of European  
Security Services



Austria - Belgium - Cyprus - Czech Republic - Denmark - Estonia - Finland  
France - Germany - Greece - Hungary - Ireland - Italy - Luxemburg  
The Netherlands - Norway - Poland - Portugal - Slovakia - Spain - Sweden  
Switzerland - Turkey - United Kingdom

**Annual Report**  
**2003**

## At a crucial cross-road, it is time for CoESS to set priorities



From its start, CoESS has always been very closely linked with developments taking place within the European Union. CoESS was created in 1989, at the initiative of only a handful of national private security associations (its founding members were France, Germany, Italy, The Netherlands and The United Kingdom).

Its main goal was to become a full participant of the European Social Dialogue, guided and presided by Directorate-General for Employment and Social Affairs of the European Commission.

For the following years, CoESS has been an important player in the European Sectoral Social Dialogue. Not in the least through its very constructive and mutually respectful relationship and cooperation with UNI-Europa, representing the European trade unions of the private security industry. Together with our social partner, we have been able

to guarantee the success of a series of major projects, conferences and joint texts, with the logistic and financial support of the European Commission.

But Europe is moving forward and so is CoESS.

The European Union is at present preparing the arrival of 10 new Member states. It is working towards a European Convention on the future of Europe and looking into ways to adapt its mechanisms and make them workable and efficient with 25 member countries or more, and thus to make its institutions more transparent and closer to its citizens.

### New statutes, structures and working methods

CoESS also is moving forward. The process is fruitful but it needs time. From the very first discussions over the adoption of some radical new Statutes in Istanbul in September 2002 to the implementation of the new structures and working methods, CoESS has set itself new political and structural goals which must allow it to take up fully its role as the sole and unique voice representing in Europe the interests of all branches and activities of our industry.

On the political level, CoESS will continue to develop its activities within the European Social Dialogue. It is only through understanding and joint initiatives with the European representatives of our employees that the private security sector can evolve towards a professional sector able to deliver high quality services and offering its guards decent working conditions. Our first allies in this field will therefore remain the trade unions.

### Looking beyond social issues

But CoESS needs to look beyond the social issues. Since the dramatic 11 September 2001 events, our sector has been given new opportunities but at the same time new serious obstacles. I will name only a few: the immense problem of insurance and third party liability which not only influences the airport security but will have a strong impact on all guarding activities, the development of cross border transport of cash and other valuables, the lack of integration of the European private security services market, the need for more intense collaboration between responsible national authorities, the need for a start of a European harmonization of private security regulations, and the lack of structured consultation of our industry by the competent European and national authorities.

Because of these and other challenges, CoESS has decided to also direct its efforts towards all European institutions and decision-makers.

.../...

Up till May 2004, CoESS has to focus primarily on the preparation of the accession of 10 new EU Member States. Given the fact that private security remains by a very large extent the competence of the national authorities, the risk of a chaos in our industry - both in the present and in the new EU Member States - is real. CoESS is already investing a lot of its resources in the development of a closer cooperation with its member federations in some of these countries and is elaborating intensive contacts and talks to encourage other countries to evolve towards the establishment of a national federation and to join CoESS.

### **Adapting structures, organisation and financial means**

So CoESS has set itself many goals and not the least ones. CoESS had therefore also to adapt its structures, organisation and financial means. These changes, supported and decided by all member federations, have already been tremendous. In comparison to the past, we now function with a permanent secretariat general in Brussels, headed by a general secretary and with administrative assistance, seven Working Committees have been established and are running, the Board of Directors and the Executive Committee meet at regular times to guide CoESS into the right direction (please see following pages for a detailed overview of all the organisational activities over 2003).

However, we are now at a crucial cross-road. Decisions have to be made. Political goals have already been fixed. It is time to set priorities. Can we keep up the pace of development of the past two years? Yes we can. But on one condition: we must balance our goals with the necessary means. If we want to fulfil our objectives in an efficient, structured and transparent way, we must substantially increase our resources, both in financial and logistic terms.

### **Acting jointly**

This is the challenge for CoESS for the year to come. We know our direction, we know our value, we have put the train on the rails. It is now a matter of deciding on the length and the speed of this train. I hope that like in the past, all our member federations will participate in an active way to this major debate which lies at the heart of CoESS. I hope that once again we will come to conclusions and be able to act jointly.

It is with great pride that I present to you this first CoESS Annual Report. It will hopefully become the start of a long tradition. I would like to thank all those who have invested time and energy in its preparation. Once again, CoESS can only survive if there is real investment from each one of you!

Marc Pissens, *President*



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## GUARDING

The Guarding Committee met three times in Brussels during the first half of 2003. Following the guidelines of the CoESS Board of Directors, activities of the Committee members have been focused on the production of a guarding services position paper.

After discussion of the working programme and the identification of the most important issues, the Committee members agreed on the preparation of a draft position paper. Contributions on current and future trends of the European guarding services as well as main problems of the guarding activities in the different European countries were also examined and discussed.

The content of the position paper was analysed and approved in the second meeting on the basis of the different contributions submitted by the Committee members. It is structured as follows: a) analysis of the current situation/problems; b) starting point and c) suggestions both of a general character and especially linked to the public authorities, social issues, market and industry. The draft project approved in the meeting was delivered for review to the different committee members and submitted for approval to the CoESS Board of Directors.

The Committee began in June 2003 a second stage in the working programme, focused on future actions regarding the position paper : the need to inform about the content of the paper to every agent of the sector since it is essential to improve the image of the sector, the role of the national associations and the production of accurate statistics is essential for this purpose. Additional issues have also been discussed and will be incorporated in the future strategy.

The next meeting shall take place in October. Although considerable progress in the tasks has been already achieved, the Guarding Committee is firmly committed to continue its activities in order to inform all stakeholders about the content of the position paper.

### Members of the Working Committee HUMAN GUARDING

Angel VIZCAINO OCÁRIZ (Spain)  
President



Kris VAN DEN BRIEL (Belgium)

Jorge LEITAO (Portugal)

Claude LEVY (France)

Alain VAN LIDTH DE JEUDE (Belgium)

Peter KRAMMER (Austria)

Tony O'NEILL (United Kingdom)

Fabrizio PROIETTI (Italy)

Altan TUTKUN (Turkey)

Wofgang WASCHULEWSKI (Germany)

Hilde DE CLERCK (CoESS)

### Dates of meetings

**JANUARY 16th, 2003:**

Discussion of working programme and main issues to be dealt by the Committee

**APRIL 24th, 2003:**

Discussion and approval of position paper

**JUNE 26th, 2003:**

Overview of position paper and future actions of the Committee.

**OCTOBER 20th, 2003:**

Next scheduled meeting

## CASH-IN-TRANSIT

Like the other COESS Working Committees, the CIT working committee was created in ISTANBUL during the COESS General Assembly of 2002.

The aim of this committee is to be aware of everything that is important to run this business within Europe and to become recognized within the industry in order to be able to influence the different bodies involved in this market.

For the time being, we are focusing on the difficulties that harmonization of the laws across the 15 member countries brings, together with the essential social dialogue linked to this project.

The EU Commission, such as DG Internal Market (Mrs G. FAGES), DG Economic & Financial Affairs (Mr. J. VERHAEVEN) and DG Employment and Social Affairs (Mr. R. DELARUE) are very involved in this process.

A first meeting was directed by DG ECFIN in June 2002 and led to the first draft of a text proposed by DG ECFIN in October 2002. The content of this text is still being discussed.

Other meetings took place within the Social Dialogue under the presidency of Mr. Rudi Delarue of DG Employment and Social Affairs. Five meetings have already taken place and a further two are scheduled to take place before the end of 2003.

Three other important events have also taken place so far in 2003 where the CIT harmonization subject was very significant.

Firstly, the Athens Uni-Europa Conference (12 April), where both Uni-Europa and COESS were able to exchange views about this difficult item.

Secondly, the ESTA annual Conference in Paris (19 and 20 May) where harmonization was at the heart of the event.

And thirdly, The Ligue internationale des Sociétés de Surveillance meeting in Madrid (22-23 May) focused on CIT items.

These 3 events were very important to understand clearly the goals, the positions and the wishes of the industry about European CIT Harmonization Laws.

### Members of the Working Committee CASH-IN-TRANSIT

Raffaele MADDALONE (Italy)  
President (left)  
Bernard DUMOULIN (Belgium)  
Vice-President (right)



Bernard D'HONDT (Belgium)  
Jacques GODEFROIMONT (Belgium)  
Michael SCHNABL (Austria)  
Bernard SMITH (Ireland)  
Lorenzo MANCA (Italy)  
Paul FULLICKS (United Kingdom)  
Timo SANKARI (Finland)  
Michal FÁBERA (Czech Republic)  
Victor MOSER (Switzerland)  
Alberto MUGUIRO (Spain)  
Hilde DE CLERCK (CoESS)

### Dates of meetings

This committee has already organized 2 meetings in 2003:

- The first on 18 March, where the draft paper of the Industry position about Harmonization of CIT Laws was presented and discussed and consists of what was then presented in ATHENS.

- The second one will take place on 28 October to discuss the differences between the COESS and UNI-EUROPA positions.

But in fact, like an iceberg, most active work is done during the numerous meetings with Uni-Europa and the EU Commission where our CIT Committee is always represented.

## CASH-IN-TRANSIT

In fact, this has led the Working Committee to take the following 3 steps:

-1st step: "Point to point cash-in-transit" : to facilitate the road transport of valuables from a member country to another one without any intermediate stop.

-2nd step: "Cabotage" : to facilitate the pick-up and delivery routes crossing the border and offering services not only in the country of origin but also in neighbouring member countries.

-3rd step: to fix some minimum standards for a CIT company to be able to service customers within Europe, and in fact to define the basic articles of each CIT law.

To get more technical information, please refer to the article in the COESS News letter of May 2003.

Several other meetings will be necessary to reach an agreement with Uni-Europa, but DG ECFIN now wants to achieve an initiative on the first step by the end of 2003 and therefore things will have to be sped up during the last trimester.

The next COESS CIT Working Committee meeting will take place on 28 October 2003 in order to finalize the last part of the negotiation.

Special mention also needs to be made of a study requested by the European Commission. It is co-financed by CoESS and UNI-Europa. It is being coordinated by Mr. Christian Bernard, a French lawyer. The aim of the study is to make a detailed comparison between all the CIT laws of the 15 EU Member States by June 2004, and therefore to help CoESS to progress towards the 2nd and 3rd steps of our goals.

If the last trimester of 2003 is busy, then 2004 will be just as intensive, as we focus on this study, on the 2nd step, and on the impact of the ten new EU Member States.

This Committee is not yet free of hard work.

Good luck to everyone !

## ELECTRONIC SURVEILLANCE

The goal of the The Working Committee Electronic Surveillance is to work on the harmonisation of activities inside the electronic surveillance field, taking into account e.g. the enlargement of the EU and the needs of the current candidate countries.

The main target of the Committee is to describe the chain of services, how to overrule it and make recommendations of running the business properly.

A kind of "buyers guide" is needed.

An essential part of the work of the Committee is the co-operation with the other organisations working on the same field of operations, but having maybe a different kind of view to examine the issue.

With this objective in mind the two committees, CoESS's Working Committee on Electronic Surveillance and Euralarms Committee SC 7, Alarm Receiving Centres, had their first joint meeting in July 2003 in Brussels. It was decided to work together because of the similar goals and targets of the committees although the differences of the aims of CoESS and Euralarm are very clearly recognised (CoESS : Operational/political and SC 7: Technical).

Subcommittees were formed to clarify national standards and statistics in EU. A common mission statement was accepted as a basis for the future activities. The name of the common project was decided to be "European Alarm Receiving Centres".

Euralarm is the Association of European manufacturers and installers of fire and security systems. To day the members of the organisation are national associations and individual industrial members.

(Website: [www.euralarm.org](http://www.euralarm.org))

Main goals for Euralarms Committee SC 7 are to have one and the same European wide test and certification for the products and same principles to run the Alarm Receiving Centres.

Assumptions in the field of operations of the committees are complicated and the practices and legislation vary in different countries. The committees are facing a massive but interesting field of work.

### Members of the Working Committee Electronic Surveillance

Ari UUTINEN (Finland) - President



Peter HENHAPL (Austria)

Didier WELLENS (Belgium)

Jacques SEGERS (Belgium)

Pekka HOLOPAINEN (Finland)

William BROWN (Ireland)

Claudio TEDESCO (Italy)

Antonio VILLASECA (Spain)

O. Oryal ÜNVER (Turkey)

Murat KÖSEREISOGLU (Turkey)

Peter BACHUS (Germany)

Joop BOS (The Netherlands)

Taoufik CHAHED (France)

Alex CARMICHAEL (United Kingdom)

Tim GEDDES (United Kingdom)

Hilde DE CLERCK (CoESS)

### Dates of meetings

28 TH JANUARY 2003 :  
Kick-off meeting (Brussels)

18TH JULY 2003 :  
Joint meeting with Euralarm (Brussels)

16/17TH OCTOBER :  
Next meeting with Euralarm (Berlin)

## AIRPORT SECURITY

The criminal acts committed in New York and Washington on 11 September 2001 show that terrorism is one of the greatest threats to the principles of democracy and freedom and the values of peace.

The establishment of a high level of protection requires the setting up at European level of common security standards taking into account all aspects of aviation security services.

The effective implementation of common security standards requires the setting up of appropriate quality control systems and the organization of a collective annual review of the standards set forth.

### Definition about airport security:

The prevention, within the scope of the responsibilities of the security companies involved, of any security activities involving the protection of land, property and assets within an airport perimeter, in accordance with the specific and prevailing local, national and European regulations.

The EU-authorities decided that regulations of security became more important in the sector of aviation in Europe. Therefore new EC-regulations were implemented (e.g. Regulation (EC) No. 2320 / 2002) so that uniform rules of standards are introduced.

Because of the above mentioned criminal acts, CoESS created a "working committee on airport security". The objectives are :

- To act as a representative voice for the security industry with the bodies responsible for forming EU regulation.
- To act as a representative voice for the security industry with the general regulating bodies within the Aviation industry.
- To open dialogue with and influence the policymaking process within the organizations referred to in the previous two points.
- Identify the groups with which we should communicate and agree actions that will promote the security industry, and our views, to all regulating bodies.
- To ensure that agreements made within European Aviation Security Association (leading companies in the field of aviation security founded EASA in 2002) are communicated to and followed by national

## Members of the Working Committee Airport Security

Friedrich P. KÖTTER (Germany)- President



Marc PISSENS (Benelux)

Richard B. FRANKEN (NL)

Martin WIESINGER (Austria)

Alfonso Bilbao IGLESIAS (Spain)

Doug HEWITSON (United Kingdom)

Hans MULDER (NL)

Can IZGI (Turkey)

Jean-Daniel ELBIM (France)

Hilde DE CLERCK (CoESS)

## Dates of meetings

Regular meetings : two times a year

1st meeting : January 29, 2003 in Brussels

2nd meeting : October 16, 2003 in Madrid

CoESS / EASA

Working Group on Quality Standards

1st meeting : 2nd July 2003

2nd meeting : app. 20th July 2003

3rd meeting : app. 15th August 2003

Topics:

- Definition of Airport Security
- Definition of the tasks and purposes of the working group
- Collecting and processing of data about the aviation market in Europe
- Admission of the different quality standards and training in the separate countries
- Strategy on the national levels
- New EC-Regulation in the field of civil aviation security
- Report to SAGAS September 2003

## AIRPORT SECURITY

security associations, and through the national associations, influence national governments.

The working group is composed of companies that carry out civil aviation surveillance and protective activities for aviation industry, airlines and airports.

The objectives of CoESS consist in defending the best interest of the corporate bodies and natural persons whose activity involves the surveillance and the protection of civil aviation, in particular as regards the inspection of individuals and the inspection of luggage and cargo as well as any security measures.

The CoESS Working Committee on airport security and EASA work in effect side by side.

Moreover, at EU level, a group of national representatives (Member States representa-

tives) was created to discuss the implementation of the regulations (2 day meetings). It is called the "Regulatory Committee".

The European Commission has equally asked stakeholders for their input regarding criteria by which compliance with the EU regulation can be measured (quality control). A group called SAGAS (Stakeholders Advisory Group on Aviation Security) was therefore created in parallel to the Regulatory Committee. The stakeholders are AEA (European Airlines), IATA (International Aviation Transport Association), ACI (Airports Council International), CoESS (Confederation for European Security Services), EASA (European Aviation Security Association), ECA (Cockpit Association), ESC (shippers) and EEA (courier / Express Services).

### Aviation security market size in Westerns Europe (annual figures 2003- estimated)

	MARKET SIZE 2003	IN PERSONNEL	IN MILLION EUROS
BREAKDOWN PER COUNTRY	UK	10.463	310
	Germany	8.606	255
	France	6.750	200
	Italy	1.181	35
	Rest of Europe *	13.000	410 *
<b>TOTAL</b>		<b>40.000</b>	<b>1.210</b>
PER SEGMENT		<i>Including the Rest of Europe</i>	
	Cargo security	810	16
	Passenger & baggage screening	27.580	440
	Airport & aircraft access	9.990	296
	Profiling	1.620	48
		Rest of Europe * : 410 *	
<b>TOTAL</b>		<b>40.000</b>	<b>1.210</b>

\* Rest of Europe (410 Million Euros) :

The Netherlands : 110 Million Euros / Belgium : 40 Million Euros / Spain : 80 Million Euros / Sweden + Norway + Finland : 70 Million Euros / Austria : 20 Million Euros / Switzerland : 28-30 Million Euros / Portugal : 20 Million Euros / Ireland : 10 Million Euros / Greece : 30 Million Euros

## SOCIAL DIALOGUE

Since the last CoESS General Assembly, five plenary sessions of the Social Dialogue and six secretariats meetings have been held.

This brief report gives some highlights of the questions tackled. Some of them will be resumed more in detail within the framework of the other working committees, in particular the issues related to CIT.

### Code of conduct and ethics

This document has been the subject of an important work between COESS and UNI-Europa for two years, and was signed on July 18 2003 (by Marc PISSENS, CoESS President and Bernadette TESCH-SEGOL, UNI-Europa Regional Secretary).

This code is a set of recommendations, both to employers and to employees, regarding their rights and duties, and is hoped to bring a better understanding of the relationship between social partners and define a line of conduct at all levels: sector level and company level.

### Modernization of the work organization

#### "Project "SPOT"

#### (Private Security & work organisation)

This project, confided to the Université Libre de Bruxelles, is a follow-up, at the level of some countries (France, United Kingdom, Netherlands, Denmark, Spain, Belgium) of the study on the harmonization of legislations and covers more in detail methods of work organisation and collective agreements.

This project has been realized through the collection of information in every country, coming from both company management and employees' representatives, and of their respective professional organizations.

The results of this study have been sent to all the members and are also downloadable from the Internet ([www.coess.org](http://www.coess.org))

### Health / Safety

The project on a manual on the health and safety for the industry started also under the aegis of the Université Libre de Bruxelles.

This manual is intended to establish a "Code of good

## Members of the Working Committee SOCIAL DIALOGUE

Claude LEVY (France) - President



Marc PISSENS (Belgium)

Angel VIZCAINO OCÁRIZ (Spain)

Raffaele MADDALONE (Italy)

Ari UUTINEN (Finland)

Stephan LANDROCK (Austria)

Harald OLSCHOK (Germany)

Bernard DUMOULIN (Belgium)

David DICKINSON (United Kingdom)

William BROWN (Ireland)

Henrik ULDAL (Denmark)

Constantinos AVRAMIOTIS (Greece)

Vasco LUCENA (Portugal)

Fabrizio PROIETTI (Italy)

Hilde DE CLERCK (CoESS)

## Dates of meetings

27/01/03, 02/04/03, 30/06/03

- European Project on Health and Safety : 18 & 19 Sept. 2003 (closing conference)

Scheduled :  
19/11/03, 16/12/03

## SOCIAL DIALOGUE

practices" in the field of health and safety both for employees and employers.

The project and the research are being conducted in six countries (Belgium, Spain, Sweden, Italy, Germany, Ireland). The study is done mainly by direct interviews. A seminar will take place in September 2003 to disseminate and follow up the results.

### **Manuel on basic guarding**

The success achieved by this manual incited CoESS, together with UNI-Europa, to submit a demand of subsidy for its translation into all other languages of the European Union (Dutch, Danish, Swedish, Finnish, Greek, Portuguese, and Lithuanian for reasons of future enlargement).

The European Commission supported us with the necessary financial aid and this operation will be finished at the beginning of 2004.

### **Enlargement**

Last year, at the initiative of UNI-Europa, a conference was organized in Lithuania in order to establish contact with employees, on the one hand, and, on the other hand, with employers to incite them to built up national associations and then to join the European organizations (CoESS and UNI-Europa). The Baltic States took part in this conference.

COESS engaged itself to organise a similar operation with the following countries: Czech Republic, Hungary, Poland, Slovakia etc. A subsidy for a conference which should take place in Budapest in 2004 will be requested from the European Commission.

### **Cash-in-transit**

Many in-depth discussions were initiated with the European authorities wich intend to regulate the free circulation of the Euro.

At present, this would be limited, firstly, to the cross-border transportation. Numerous problems are obvious and divergent points of view exist among the social partners and other stakeholders.

ESTA\* participates in these discussions in close collaboration with COESS.

To facilitate the study of these questions, a demand was submitted to the European Commission with a view to establish a synthesis of the various legislations concerning the transport of values in the countries of the European Union.

In principle this study was agreed for by the Commission and shall start at the end of September 2003.

It was confided to a French lawyer who knows well the CIT Sector.

This study should be ready by June 2004.

### **Conference of Barcelona**

CoESS and Uni-Europa will be jointly organising a 4th European conference on the Private Security Services in September 2004. Barcelona was chosen as the location. The subject of this conference will be: "Towards a European model for the private Security Industry".

A demand of subsidy to the European Commission was sent on September 1st 2003

\*ESTA : European Security Transport Association

## TRAINING

Growing concerns regarding security matters amongst both the global business community, Governments, and the public mean that the quality and levels of training and qualifications provided to security personnel are now often at the forefront of end-user thinking when deployment decisions are made.

The private security industry has traditionally been engaged by customers to protect private assets to include premises, property and most importantly the people and not, for example, to patrol the streets, but it must now be recognised that anti-social behaviour, disorder, crime and terrorism know no boundaries. It can come as no surprise therefore that sometimes by default, but more often by plan, private sector security personnel are playing an increased role in securing the environment surrounding their customers premises and therefore becoming a vital partner in providing public reassurance in their communities.

The CoESS Working Committee on Training on recognises therefore that as the scope and importance of security work continues to grow, so the degree of professionalism expected from employees will increase. Specifically training and qualifications give meaning to our future actions and enable us to mobilise the efforts of our people and combine their knowledge and skills. Relevant, quality training will secure their future employability, improve their productivity and in turn empower them and our industry in the achievement of shared aims and objectives. Poor training remains a significant cause for a low social image and poor remuneration and can result in difficulties in finding suitable people for employment. This may hamper further privatisation of tasks currently associated with public bodies and reduce new business opportunities for our industry. Continuous professional development has become a necessity for the employees of the security industry of the 21st Century. Planning a path of learning reinforces employee loyalty and ensures an individual has a sense of their future with a company. Potential employees are much wiser than they used to be and a security company with a reputation for developing its staff is seen as a good company. Anecdotal evidence from the United Kingdom suggests, that those companies

### Members of the Working Committee TRAINING

David DICKINSON (United Kingdom)  
President



- Peter KEEGAN (Ireland)
- Raquel RAMIREZ (Spain)
- Peter SCHMIDT (Germany)
- Claude LEVY (France)
- Sefa BASATLI (Turkey)
- Michael MATHER (Austria)
- Jane McKENNA (United Kingdom)
- Hilde DE CLERCK (CoESS)

### Dates of meetings

10/02/2003  
02/07/2003

Scheduled :  
13/10/2003 in Wemmel

## TRAINING

that deliver quality training programmes to their employees and develop them accordingly have a significantly reduced turnover of employees.

However, great disparity currently exists in relation to the training of security personnel across current EU member states, with specific harmonisation problems arising in the following areas:

- In the majority of member states the private sector is already subject to Government regulation, with specific legislation existing in relation to training. Where regulation has only recently been introduced, or is in the process of being introduced, training criteria has in most cases yet to be finalised
- It is also unclear what the current training systems are within many aspirant member states
- There are differences in relation to the financing of the training with some member states providing significant public funding support, some companies paying for all training and in many cases the individual paying for training
- Disparities exist in the training delivery and learning methods
- Variances exist in relation to sub-sector training e.g. Cash-in-Transit, Aviation Security and Maritime Security (In some countries security personnel are permitted to carry firearms)
- Some CoESS committee members have reported that highly regulated training in their countries has led to a lack of flexibility and as a consequence, in some cases, it is difficult to adequately respond to market needs
- Time periods for pre-employment training delivery vary from 16 hours to 180 hours

A number of further concerns have been raised by committee members, but as they are specific to their own countries they have not

been included in this report. This diversity of approach and system creates a difficult situation for the CoESS Working Committee on Training.

### Starting Point

To help close the gap between national variances, the CoESS Working Committee on Training supports a harmonised modular training system, starting with a Basic Guarding Programme that qualifies people to work in unarmed static guarding environments. This programme should be a prerequisite for any person working as a security officer within the EU. Additional areas of work such as CCTV Operation, CIT duties, Mobile Patrols and Alarm Response for example should be addressed with additional training.

The CoESS Working Committee on Training recommends the use of the European Vocational Training Manual for Basic Guarding, April 2001 as a minimum benchmark, but recognises that in some cases national criteria in many member states will already exceed this benchmark.

### Specific Suggestions

The CoESS Working Committee on Training suggests that:

#### a) General

- EU Member states have a modular training system
- The amount and duration of training be decided nationally
- That all training is certified through appropriate national bodies
- That training be available both in-house and through external bodies

#### b) Basic Guarding

It is recommended that the curriculum for the Basic Guarding Programme include the

## TRAINING

following subjects as a minimum:

- The role, duties and responsibilities of a security officer
- Customer Care and Social Skills
- Communication Skills
- Reporting
- National Legislation
- Use of technology
- Access Control (persons, vehicles etc)
- Patrolling
- Dealing with emergencies
- Fire Awareness
- Health and Safety

### c) Specialist training and continuous professional development

The CoESS Working Committee on Training fully supports that security officers receive specialist training to operate effectively in other environments and that all security officers are developed through continuous professional development systems. However, it is considered inappropriate to determine the level and duration of such training as many member states have their own systems and criteria in place, in many cases as a result of national regulation. Some additional recommendations on training subjects are:

- Diversity - diversity must be addressed. In working within the wider European community it is particularly important that security personnel understand social and cultural differences especially in vulnerable groups. Vulnerable groups themselves are diverse and include the elderly, disabled people, ethnic minorities, cultural minorities and children. Understanding diversity is key to effective communication in the increasingly multicultural society we now live and work in and is extremely important in diffusing conflict.

- Conflict management- Conflict management skills are also lacking in our workforce,

a fact that has identified by most national Governments and as a result most national training systems now include such training.

- Technology - Understanding technology will also be a key feature of future training as more and more organisations and communities opt for an IP based, totally integrated, networked security system, which will in most cases not only complement the work of security personnel, but actually be controlled by them. This may lead to less security personnel being required, but those that are required must be far more competent in the application of technology.

- 'Redundant training' – redundant training must be addressed. In other words, companies must endeavour not to re-train people in the same subjects every time they win a new contract or when they recruit a new member of staff as this is cost inefficient and stifles many peoples natural urge to learn.

Finally the CoESS Working Committee on Training would like to ensure that companies across member states are encouraged to cooperate and begin to work as a united industry, where all stakeholders accept ownership for learning, training and development, the result will be a highly professional workforce where the sustainability of the competence levels will be made much easier and learning becomes the responsibility of us all.

## ENLARGEMENT

Representatives of Austria, Finland, France, Germany, Greece, the Czech Republic, Slovak Republic, Estonia, Poland, Cyprus and Turkey form this committee under the chairmanship of Stephan Landrock.

In 2003, the CoESS Working Committee on EU-enlargement has met 3 times in different places.

The major points in these meetings were to find facts, problems and solutions for the structure of the security industry in the different EU-applicant countries and a future cooperation with these countries.

Some findings and resumés of the discussions and comments were, that :

- after the political changes a strong need for private security companies created a growing market due to the changes of the economic systems and high crime rate.
- Legislation for the industry is different country by country and still under discussion.

Main focuses are licensing, weapons, training.

- The relatively young security industry is highly fragmented. A high number of security companies exist. Many of former police or military officers started their own security companies after leaving the governmental services. Beside them international security companies entered and invested in the new market.

- The total number of employees in the security market is significant higher than in the existing EU-countries compared with the number of population.
- The wages for security guards in the new countries are significant lower than in the EU. Present wages between 1 – 2 Euro per hour will create social tensions and market problems with neighbour countries in the EU.

Trans-national flow of work force is controlled by a seven years phase-in period.

Trans-national service of companies could create unfair competition, market turmoil and new security risks.

- The security industry itself lacks in the most countries on strong national representative associations and unions, which can speak and lobby for the industry.

### Members of the Working Committee ENLARGEMENT



Stephan  
LANDROCK  
(Austria)  
President

- Marc PISSENS (Belgium)
- Claude LEVY (France)
- Jorma HAKALA (Finland)
- Harald OLSCHOK (Germany)
- John ARGHYROU (Cyprus)
- Michal FÁBERA, (Czech Republic)
- György FARKAS (Hungary)
- Tomás HNEVSA (Czech Republic)
- Lubomir KÖSEGI (Slovakia)
- Ivo KRPELAN (Slovakia)
- Juraj NÁDASI (Slovakia)
- Jaanus PAJUMAA (Estonia)
- Pawel RAFALSKI (Poland)
- Oryal ÜNVER (Turkey)
- Christina SARRAF (Austria)
- Hilde DE CLERCK (CoESS)

### Dates of meetings

- January 28th 2003 in Wemmel
- April 24th 2003 in Vienna
- June 24th 2003 in Budapest
- September 24th 2003 in Corfu

## ENLARGEMENT

- CoESS welcomes the EU-enlargement process and invited together with UNI-Europa representatives of the EU-applicant countries to participate in the social dialogues.
- By sharing experience and consultation on risks and problems CoESS cooperates with the most representative local association based on common EU values with the target to harmonize future developments in a greater Europe.

The countries Romania, Bulgaria, Croatia, Slovenia and Malta are contacted as possible new members in this working committee.

Upcoming project is a conference sponsored by the European Commission dealing with the issue "How does the social dialogue contribute to the future of private security industry?" to be held in Budapest in 2004.

## ORGANISATION AND REPRESENTATIVITY

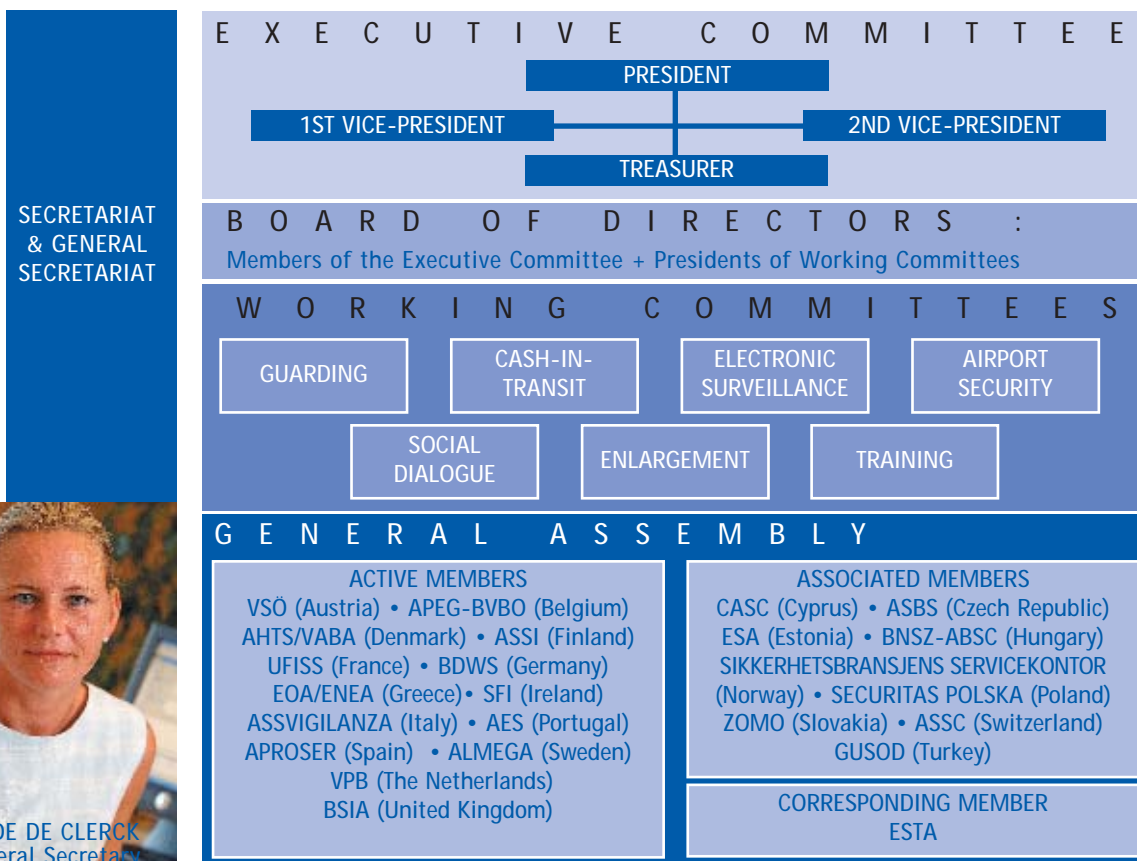
Immediately after the adoption of the new CoESS Statutes (at the CoESS General Assembly in Istanbul in September 2002), the newly defined structures and organisation of CoESS were put into practice.

2003 has therefore been a transitional, but nevertheless very crucial year. The content and activities described in this first CoESS Annual report prove that time has not been lost and that the investment of a lot of efforts and energy have led to some very concrete first results.

- The Board of Directors, the Executive Committee and all of the Working Committees met a regular times. With their composition in place, agenda's defined and work underway, these new structure are running now at their cruising speed.
- Contributions from the CoESS member federations, both in financial terms and human investment, grew considerably.

- A permanent Secretariat was set up in Brussels, at the heart of the European Union activities, and is headed by a General Secretary (Hilde De Clerck – see picture) and an administrative assistant (Mrs Marlyse Hanssens). Thanks to the secretariat, communication and information flow between the different bodies of CoESS and the members at national level has become more intense and more transparent. The secretariat has been able, over the last year, to develop itself into an efficient headquarter for all CoESS activities.

- In order to become more visible and develop a communication strategy, a web-site has been launched and the CoESS Newsletter has had a major face-lift (see article on page 20).



## ORGANISATION AND REPRESENTATIVITY

In 2003, contribution from the national federations grew in importance and efficiency. But more progress in cooperation remains fundamental as CoESS can only reach his objectives through the development of a complementarity between the national federations and CoESS as a whole. CoESS will not be able to function properly according to its new ambitions without strong national federations; likewise, national federations, in order to become strong and efficient, need the input and the assistance of CoESS.

2004 will be the year of the entrance into the European Union of 10 new Member States. In 2003, CoESS has invested a lot of resources in the assistance of its member federations in those countries. The private security industry in Cyprus, Estonia and Poland became members of CoESS and joined the already member federations from the Czech Republic, Hungary, Slovakia and Turkey. Next year, CoESS will try to cooperate with the private industry in the other concerned countries in order to help them establish representative federations and to become CoESS members.

## COOPERATION

But CoESS also joins efforts with other organisations representing the private security industry:

- Since the establishment of its Working Committees, CoESS has been working closely with [ESTA](#) (a CoESS corresponding member). ESTA represents the European cash-in-transit companies. Especially on issues where CoESS and ESTA have common interests, this cooperation has been particularly fruitful. The CoESS Working Committee on cash-in-transit is composed of numerous ESTA representatives. Thanks to their specific expertise, CoESS is now able to tackle, together with ESTA, the challenges this very specific branch of the industry has to face.
- As far as airport security is concerned, CoESS works intensively with [EASA \(European Aviation Security Association\)](#) within the Working Committee on Airport Security. All major companies delivering guarding services to airports and airlines are represented within EASA. Their knowledge of the specificities of this branch of activities provides CoESS with the necessary input to tackle obstacles.
- CoESS also has a fruitful co-operation with the [League \(Ligue internationale des sociétés de surveillance\)](#). As the representation of the world biggest private security companies, all definition of policies and strategies by the League is crucial also for the development of the private security industry in Europe. In 2003, CoESS has had an on-going and open exchange of information and ideas with the League and has itself as a goal to deepen that cooperation, eventually leading up to joint projects and initiatives.

## INTERNAL AND EXTERNAL COMMUNICATION

### COESS WEBSITE :

All you always wanted to know about CoESS is now on the net ! A strategic tool to be widely used for internal and external needs

Although the creation of the CoESS web-site is being mentioned a few times throughout this CoESS Annual report, it is important to stress in a special way its particular importance.

No serious European organisation can nowadays survive without being backed up by a web-site. Within CoESS we have therefore decided to create not a purely static and informational web-site, but a substantial tool which member federations can use for communication with CoESS, with each other and with the outside world.

One of the main features of the web-site is without any doubt the "Members Only" section (intranet). This section has the vocation to become a real internal discussion forum in which the member federations can express freely their views on a number of ongoing themes and discussions and to replace, to some extent, part of the working meetings.

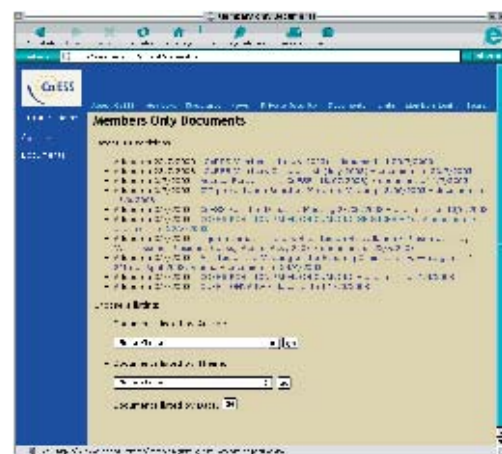
Apart from the "Members Only" sections, other very useful sections are the "Documents" and News and Press" sections. They must become, in time, the most important source of information on private security in Europe. Also the detailed presentation of all of the CoESS Members and the very elaborated "Links" section constitute valuable advantages when surfing on the site.

The web-site has been launched only very recently. It must become a lively and useful tool for everyone wishing to obtain information not only on CoESS but also on private security in Europe in general. It can only become such an instrument if all CoESS members fully participate in using actively the web-site, in "nourishing" it and in helping developing it towards this goal.



*All external documentation and publications are now available on coESS website (extranet part).*

*CoESS members benefit of more detailed and internal informations on the intranet part of the website ("Members Only"), accessible by a secure login*



**The CoESS web-site has following address: [www.coess.org](http://www.coess.org)  
Please don't hesitate to largely promote and disseminate this address for internal and external needs.**

## INTERNAL AND EXTERNAL COMMUNICATION

The new "CoESS Newsletter" needs the active cooperation of each member

From its start, CoESS has recognized the need to regularly inform its members not only on activities within CoESS, but also on special items related to the European private security in general, on news from the member federations, on specific developments within the European Union and on any other issue that might be of interests.

Since its start, CoESS has produced already 12 issues of its Newsletter, every issue of which always has been met with great enthusiasm by its addressees.

Given the recent organisational and structural fundamental changes CoESS has been implementing over the last year (see also the editorial by Marc Pissens, President of CoESS), it was also only natural to reorganize the Newsletter.

It was therefore decided, as from the last issue on (Nr 12) to produce the CoESS Newsletter in a more substantial version (the number of pages has increased considerably), in only one language (since English has become the sole language of CoESS), to disseminate it primarily by electronic means (electronic mailing and publication on the CoESS web-site) and as a consequence reaching a much bigger and more varied public than ever before.

The reactions of our members have shown that we are on the right track. We will work on constantly further improving the content, the lay-out and the dissemination of the CoESS Newsletter. For this last and most important task, we must be able to count on all our national member federations to do so. It is their task to promote as widely as possible this fundamental source of information. They receive it by mail, they have it available on the CoESS web-site and they receive the number of printed issues they need. The rest is up to them!



*new layout and electronic version since issue number 12 (May 2003)*



*initial layout English/French version*



## Austria

### Facts and initiatives

The Austrian security association VSÖ was founded in 1975. Today most of the renowned companies of the Austrian security industry (80 % of the guarding and CIT market) are amongst its members. Beside the guarding industry, also other branches of the security industry are represented in three sections of VSÖ and at the same time united in one platform: electronic security, mechanical security and private security services section where the Austrian insurance association VVO is also holding membership. VSÖ is also maintaining an excellent cooperation with the Ministry of Interior and with the Police. The Austrian association was a pioneer in introducing the European manual for public tendering. Education and training for basic guarding according to the CoESS model has been established in Austria through the association and integrated into a certification process.



### Statistics

#### Guarding sector in Austria in 2002

- 203 guarding companies
- 195 million Euros of annual turnover
- 156 million Euros of annual turnover of VSÖ-members (guarding section)
- 62,2 % turnover from static guards
- 6770 employees (private security agents)
- 5500 "in house" security guards

## Belgium

### Facts and initiatives

The APEG-BVBO has continued in a very intense way to reinforce its modernisation and professionalisation process which it started in 2001. It has now become a truly neutral, efficient and promotional organisation representing more than 90% of the private security companies. It has also become a member of the Federation of Belgian Enterprises (VBO-FEB).

Thanks to the intensive lobby-work of the APEG-BVBO, the new government (installed in last July) has announced legislative initiatives both in the fields of bogus self employed guards and the modification of the 1990 basic law on private guarding.

The former problem has over the last years created tremendous problems for the members of the APEG-BVBO which hopes, supported in this by the trade unions, that concrete measures will be taken to the authorities in order to free the market from competition distorting and profession destroying companies. With the modification of the 1990 law, a small but important series of non core police activities could be transferred to the private security sector.



### Statistics

#### Guarding sector in Belgium in 2002:

- Number of authorised private security companies: 140
- Total number of persons employed in private security: 18.000
- Total national turnover by private security companies: 580 million Euros
- Of which**
  - 70 % static guarding
  - 8,5 % monitoring and electronic surveillance
  - 13 % CIT
  - 3,8 % protection and surveillance of persons
  - 4,7 % other private security activities

APEG-BVBO represents more than 90% of turnover and of personnel.

Other important legislative changes to be mentioned are the possibility for Light CIT, the new regulations concerning identification cards of guards and some new rules on methods of guarding.

## Cyprus

### Facts and initiatives

The Cyprus Association of Security Companies was formed in 2002. It is the only Association that represents the interests of Security Companies in Cyprus.

The main objectives of the Association are to :

- Lobby Parliament so as to introduce legislation which will govern the local private security industry. This is extremely important for reasons of quality, raising standards and enhancing the image of industry.
- Set very high membership standards thereby ensuring that all new entrants, will have to abide by such standards.
- Closer co-operation and understanding between the members of the Association.
- Establish greater co-operation with the police and other relevant associate bodies for the benefit of all concerned.
- Protect the interests of its members and in turn the customers of such members. A body to be established which will investigate redress of grievances.

### Statistics

#### Security sector in Cyprus in 2002

- 40 private security companies
- 19 million Euros of annual turnover
- 33,8 % turnover from static guards
- 1200 employees (private security agents)
- 2000 "in house" security guards
- Association representation : over 61% of total market share
- Member of the Cyprus Chamber of Commerce and Industry

## Czech Republic



### Facts and initiatives

Two major professional organizations representing the security industry in the Czech Republic: ASBS CR and Security Club\*. Legislative regulation for guarding sector not yet established.

Still significant difference between bigger and smaller companies in equipment, training, costs and prices. C.I.T. operations professionally provided by only few companies mainly with international know-how. Guarding job positions are still low respected and recognized in the country. Usefull websites : [www.asbs.cz](http://www.asbs.cz) and [www.securityclub.cz](http://www.securityclub.cz)

\* The Security Club has officially become a CoESS member at the General Assembly in Corfu in september 2003.

### Statistics

#### Guarding sector in the Czech Republic in 2002

- 2210 guarding companies
- 198 million Euros of annual turnover
- 77% turnover from static guarding
- 28101 private security agents
- ASBS CR + Security Club represent 72% of turnover and 62% of personnel

## Denmark

### Facts and initiatives

According to the information provided by our Danish member Federation :

The basic vocational courses will be revised in 2004. A more specific conference about this subject will be held by VABA and the trade union this autumn.

At the moment we are working with new AMU (Adult vocational training programmes)- courses paid by the public, which will take care of the needs of the business.

VABA is preparing negotiations of the collective agreements with the unions in the beginning of 2004.

The collective agreements expire at the 1th of March 2004.



### Statistics

#### Guarding sector in Denmark in 2002

- 413 companies
- 5250 employees
- Public market 15 %
- Private security market 85%

## Estonia

### Facts and initiatives

A bill for a new Private security services law was passed to the Parliament in April. It is expected that the law will be adopted at the end of 2003. This bill is mainly a revision of the existing law from 1993 and does not contain any drastic changes for private security companies. Mainly it updates the regulation on private security services to legal context that have changed within last ten years and eliminates some practical contradictions.

The Estonian Security Association has also the pleasure to announce it's first ten year anniversary that will be celebrated in October 2003.



### Statistics

#### Guarding sector in Estonia in 2002

60 private security companies  
84 million Euros of annual turnover (private security companies)  
25,5 million Euros of annual turnover (static guarding)  
5500 employees (private security agents)  
73% of annual turnover realized by affiliated companies

## Finland

### Facts and initiatives

A new law on private security services has been operational since October 2002: Training before entering working life means more engaged employees for security branch. Amount of obligatory studies is 100 hours. Responsibility of training of the guards has been delegated to the Adult Management Skills Institutions.

All Security officers (incl. installers of terminal devices) need a security officer identification card.

According to the new law the Ministry of the Interior is together with the provincial police command and the State local district police responsible for general guidance and supervision concerning private security services. An advisory board on the security sector has been established.

Law on public order and safety will be operational in the year 2003: In public sites like shopping centres, public transport vehicles and stations the police will be helped by the peace officers working for private security companies.



PALVELUALOJEN  
TOIMIALALITTO

### Statistics

#### Guarding sector in Finland in 2002

150 private security companies  
510 million Euros of annual turnover (private security companies)  
22,5% turnover from static guards  
5800 employees (private security agents)  
410 million Euros of annual turnover of members

## France

### Facts and initiatives

Reinforcement of legislation : trained before missioned

A new legislation was voted in France in February 2003. The major new feature is a fundamental point concerning the obligation of training. Every person, at any level - guard as well as manager-, working in private security companies will have to prove his professional capability before being assigned to a mission (ex-ante).

French human guarding has its website :

Everything you always wanted to know about the private human guarding sector in France is now accessible on the web at [www.e-snes.org](http://www.e-snes.org). Fifth statistical report on French manned security services sector.



### Statistics

#### Guarding sector in France in 2001 :

1,980 companies  
2.83 billion Euros of annual turnover  
12% of annual growth  
107,400 employees  
21% of turnover from public contracts

#### Repartition of the turnover of French companies specialized in human security :

78% in surveillance and intervention  
12,5% in monitoring  
9,5% in other activities related to the private security business

## Germany

### Facts and initiatives

**Amendment of the legal framework:  
more vocational training**

The amendment of the legal framework for the security industry in Germany came in effect in January 2003. Apart from the possibility of a more thorough screening of the agents, it is dealing largely with vocational training. The compulsory minimum training for private security agents was prolonged from 24 to 40 hours, for employers in the security industry from 40 to 80 hours.

Further on an examination for security agents working in public places such as shopping malls, discotheques etc. was introduced.

## BOWS

### Statistics

**Guarding sector in Germany in 2003:**

3.000 companies  
4.000 billion Euros of annual turnover (prognosis)  
5,3% of growth compared to 2002  
145,000 employees  
25% of turnover from public contracts

**Repartition of the turnover of German companies specialized in human security :**

70% in static guarding  
15% in cash-in-transit  
9% in patrolling  
5% in monitoring  
1% in airport security

## Greece

### Facts and initiatives

According to the information provided by ENEA :

Since 2002, in an effort to enforce uniform conditions of competition on the employer's sector, a labor agreement co-signed by E.O.A and EN.E.A., valid for three years (2002, 2003, 2004).

The legislative framework in Greece set by the law N 2518/97 has secured the transparency, quality and health conditions at work.

In view of 2004 Athens Olympic games the demand for private security services is expected to grow spectacularly .



### Statistics

**Guarding sector in Greece in 2002**

800 private security companies  
300 million Euros of annual turnover (private security companies)  
70% turnover from guarding  
15000 active employees  
136 million Euros turnover ENEA members  
160 million Euros turnover EOA members

## Hungary

### Facts and initiatives

**Private security industry: MBVMSZ**

The BNSZ and IBSSA Hungary have agreed to form a new association called MBVMSZ (Hungarian Security Employers Confederation). The IBSSA itself as organization is not a member of MBVMSZ, but the majority of IBSSA member security companies. As soon as the registration of MBVMSZ at the courthouse is completed officially, the BNSZ is going to merge into MBVMSZ (in the second half of this year).

A new security law is under elaboration: The MBVMSZ is playing an important role in giving it's opinion for the new security law and relating law making process, as well in representing the interests of the security employers towards the government, unions and different associations.



### Statistics

**Security industry in Hungary in 2003:**

3514 companies  
301.8 million Euros of annual turnover  
68,700 employees

The private security industry is governed by specific legislation : Act IV of 1998.

**Employment statistics 2003:**

full time personnel : 98%  
part time personnel : 2%  
female employees : 10%  
male employees : 90%  
yearly personnel turnover : 22%  
maximum working time : 174 hours/months

## Ireland

### Facts and initiatives

The Security industry in Ireland is still awaiting the passing of the Private Security Services Bill, 2001. This Bill will set up the Irish Security Authority and charge it with responsibility for the control and development of the industry through the licensing of companies and guards, and the further development and Certification of National standards and Training.

The Bill has passed through 3 stages of the enactment process and is in the Committee phase, awaiting progress to the final stage. We are fearful at this point that the Bill has stalled and intensive lobbying is being carried out in an effort to push it through.

Meanwhile, the Social Partners have agreed an 18 month National pay deal, that will see further improvements in conditions of employment for all security guards, to replace the current 3 year deal that expires in October 2003.



### Statistics

The guarding sector in Ireland:

306 companies  
154 million Euros turnover per annum  
11000 security guards  
18% growth on 2002

## Italy

### Facts and initiatives

The most important news concerning the sector is the final agreement between ASSVIGILANZA (already a CoESS Member) and ANIVP (the oldest Italian private security association). Last year, both associations decided to establish a "convention", with the objective to jointly discuss, in an open and continuous way, all relevant matters concerning the sector. The Convention represents 75% of the national private security market. This agreement and cooperation between the two organisations can be considered as a really historical event, especially since the Italian market is a very fragmented one.

The Italian legislation does not allow to provide private security services outside the provincial boundaries (Italy is divided into 105 provinces). This is not the case in most of the other EU Member States. The private sector is therefore working together with the Italian government with a view to modernise the legislation.



AssVigilanza  
Associazione Nazionale Vigilianza

### Statistics

Guarding sector in Italy in 2002

1350 guarding companies  
1000 million Euros of annual turnover (guarding+CIT)  
44% turnover from static guards  
24622 employees (private security agents)

## Luxemburg

### Facts and initiatives

The sector currently employs some 2,100 security officers split between eight operators and several other small security companies (basically caretaking and event security).

The Luxemburg security market is extremely competitive. This is clear when we look at the number of security companies, which is constantly increasing. The result is a general reduction in selling prices and margins.

Its financial hub, the main field of application for caretaking and value shipment services, largely dominates the Luxemburg security market.

The security sector has to face up to banks pursuing in-

sourcing policies for caretaking activities to limit economic layoffs generating redundancy programmes.

Note that for value shipment activities, the economic recession in the finance sector is having a negative impact on turnover evolution, as the number of agencies in the country has been reduced through several mergers.

Finally, the new Luxemburg legislation on security companies provides for minimum criteria on the technical and human infrastructure required to pursue caretaking, value shipment and alarm centre management activities. These minimum criteria are intended to limit "fly-by-night" operators to ensure consumers receive a basic quality of service.

## The Netherlands

### Facts and initiatives

Between 2000 and 2003 the branche of guarding industries has undergone a growth of 8% per year and finds in 2003 more or less 32.000 security professionals working in its sector. Looking at the amount of licensed companies one sees, partly due to reorganisations and fusions, five big companies and some 545 guarding small licensed companies.

The employer organisation "VPB" represents more or less 90% of all employees and has ninety members. The VPB has an important task in negotiating towards agreements with employers unions on salaries, social affairs and represents the guarding industry towards local and national government, political organizations and the police. Next to this a lot of energy has been spent in improving the quality of the educational model for security professionals. This has been done in close cooperation with the Ministry of Justice and secondary vocational education authorities.

Main changes in Dutch law on security industries, officially published December 2002. are :

- Upgrading of the official obligated educational level to work in the security industry.
- Work based learning of one year as necessary tool to obtain the necessary diplome to work.
- An external controlled quality system on work based learning.
- A well controlled licensing system for guards.
- Standardized licences for candidate-guards and guards.

## Norway

*No information received from the national federation. For details on this federation, see page 36*



### Statistics

#### Guarding sector in The Netherlands in 2002

- 1535 total private security companies
- 32000 employees (private security agents)
- 3244 "in house" security guards
- 770 million Euros of annual turnover realized by VPB-members

## Poland

### Facts and initiatives

- In 1997 an Act of Personal and Property Protection has been issued. Within 3 next years it has been empowered with several accompanying acts, thus creating particular legal framework.

- By the appointment of the Ministry of Internal Affairs & Administration, Police execute control functions for security companies. In practice it mainly means deep controls of the labour force (criminal record is major offence) and documentation researches. Another important function of the Police is to control weapons handling.

Police officers are not allowed to

- work as part time security guards
- deliver commercial security services

Police officers basic salary is not higher than the salary of security guards.

- Since the last meeting in April, several steps have been undertaken by Securitas regarding business representativity in Poland.

First of all, a letter was sent to the chairmen of the biggest security companies proposing the following scenario :

- establish of a truly representative industry federation gathering remarkable portion of the security industry,
- create an industry lobby to influence authorities and customers,
- support industry trade unions as an important partner to create leverage of the wages & prices.

Currently individual meetings are being held between Securitas President in Poland and Presidents of big security firms. So far the talks have been held with Group4 Falck, Komandos, Konsalnet, PAO. The need of the changes is more or less clear to everyone, discussions as per technical aspects are being run.

Some efforts are being undertaken at political circles too.

The latest plan is to get all the presidents of the above mentioned companies to the meeting and discuss the fundamental issues:

- whether to create new federation or to utilise already existing to establish real representation of the security industry
- how to get into dialog with employees (trade unions)

Such a meeting is scheduled for the end of August or beginning of September.



### Statistics

#### Guarding sector in Poland in 2002

- 3600 private security companies
- 909 million Euros of annual turnover
- 52% turnover from static guards
- 200000 employees (private security agents)
- 20000 "in house" security guards

## Portugal

### Facts and initiatives

*No information received from the national federation.  
For details on this federation, see page 35.*



AES - Associação de Empresas de Segurança

### Statistics

#### Guarding sector in Portugal in 2002

- 81 private security companies
- 570 million Euros of annual turnover
- 65% turnover from static guards
- 26000 employees
- 377 million Euros of annual turnover of AES-members

### Slovakia

#### Facts and initiatives

The Slovak personal and property protection association - ZOMO - was founded in 1996 and has 3 sections :guarding, electronic and mechanical security. Since 2001, ZOMO is an associated member of CoESS.

Legislative regulation for the security sector was established in 1997 by law.

Main task for the year 2003 was and is the enlargement of the number of our members. Zomo organises all over the country meetings with legal entities working in the security sector informing them about activities in the country and abroad (e.g. membership in CoESS). There are currently in Slovakia two active associations in the security sector, with very similar programmes and structures.



#### Statistics

##### Guarding sector in Slovakia in 2002

1370 private security companies  
238 millions Euros of turnover  
17233 employees (private security agents)  
3250 guards employed by affiliated companies

### Spain

#### Facts and initiatives

**Aproser's web site and data on the sector.**

Basic information on activities and associated companies, as well as the bi-annual bulletins can be reached in [www.aproser.org](http://www.aproser.org). It is also included a summary of an extensive report on the basic data regarding the Spanish private security activities, produced for the first time.

#### Another initiatives

We co-operate in the organisation of the Spanish Private Security Congress that shall take place in the last week of October. Activities in view of defining a quality trademark for private security activities continue. A new President and Managing Director have recently taken up their respective duties in the Association.



#### Statistics

##### Guarding sector in Spain in 2002

990 private security companies  
2367 million Euros of annual turnover  
85000 employees  
None "in house" security guards  
1643 million Euros of annual turnover of APROSER-members,  
50000 guards employed by affiliated companies

### Sweden

#### Facts and initiatives

Sweguard has during this period initiated a close cooperation with Almega. Almega is an employer's organisation for service companies in Sweden and part of the Swedish collective bargaining system. Almega has also a mandate from Sweguard to represent Sweden in CoESS and the European Social Dialogue. Together, the two organisations represent 110 companies with about 98% of the total Swedish market share. The collective agreement for guards, signed in October 2002, between Almega and the Swedish Transport Workers Union, can be described as a milestone. According to this agreement, the basic training period for guards has been extended with four days of training on subject such as health and safety and conflict management. Successful students receive a vocational certificate, acknowledging the guard's professional skills and knowledge. The vocational certificate is renewed every four years with two-day long refresher courses. The vocational certificate is accompanied by an expertise development clause, guaranteeing continuous training every five years. All training is taken care of by The Institute for Guard Training, owned and run by the employers and trade union associations together with the private security companies.



#### Statistics

##### Guarding and Cash in transit, Sweden 2002

Number of companies: 300  
Turnover: 550 million Euros  
Number of employees: 18.000

Static guarding : 60% of turnover  
Cash in transit : 10% of turnover  
Mobile patrol : 20% of turnover  
Airport security: 5% of turnover  
Monitoring : 5% of turnover

### Switzerland

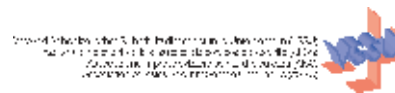
#### Facts and initiatives

The ASSC was established in 1996 and now comprises 80% of personnel working in the private security service industry. The Swiss market is distinguished by few large and many small enterprises.

The ASSC has undergone rapid development since 1999. Membership of the ASSC has increased from 6 to 32. In the year 2000, for the first time examinations were held by order of 19 of 26 cantonal Police Departments for the permission to bear weapons. In 2001 on the authority of the Federal Office for Professional Education and Technology the first state recognised professional certification examinations in security and surveillance were held. In 2002 the ASSC opened the Swiss Security Academy for the training of security staff. This year state recognised professional certification examinations for armed personal and property protection will be conducted.

The ASSC cultivates contacts with authorities such as the police, military and fire departments and is recognised by them.

At the moment the ASSC is launching a branch contract of employment which should prevent firms from paying staff at a reduced rate by law and ensure anyone working in this sector of serious working conditions.



#### Statistics

##### Guarding sector in Switzerland in 2002

- 340 guarding companies
- 10,000 employees
- 2,000 "in house" security guards
- 410 million Euros annual turnover of ASSC-members
- 325 million Euros annual turnover from static guarding
- 20 million Euros annual turnover from monitoring
- 35 million Euros annual turnover from cash in transit
- 25 million Euros annual turnover from airport security
- 5 million Euros annual turnover from protection of persons (VIP)

### Turkey

#### Facts and initiatives

GÜSOD brought up a new approach in security field in Turkey. The first University level education covering a new security program, already started on October 2003 at University of Kocaeli, Hereke Omer Ismet Uzunyol complex. GÜSOD made a big effort to open this security school even providing scholarship to high skilled trainees, an finally achieved. Security Personnel will be graduated in two years time and serve with their certificate. GÜSOD is also putting enormous efforts for the new dimension of security in Turkey, namely "maritime security", by implementing its application to the Ministry of Transport to become "Recognised Security Authority-RSO" for the new requirements of IMO's ISPS Code, which will be valid in 01 July 2004 world wide.



SECURITY SYSTEMS AND MONITORING ORGANIZATION'S ASSOCIATION

#### Statistics

##### Guarding sector in Turkey in 2002

- Size of the market : 1 billion Euros
- Size of guarding : 110 million Euros
- Total number of employees : 175 000
  - with : 30 000 guards without arm
  - 145 000 guards with arm
- Total number of companies : 450
- Minimum wage per hour : 2 Euros/h
- Total number of Security Associations : 2, GUSOD and GESIDER
- 18 companies affiliated to GUSOD employing 19500 guards, representing 52% of the guarding market.

## United Kingdom

### Facts and initiatives

- The Security Industry Authority is officially launched on 2 April 2003 to oversee regulation of sectors of the industry, in accordance with the Private Security Industry Act 2001. BSIA Chief Executive David Dickinson is appointed to the SIA's Stakeholder Advisory Committee and the BSIA is actively involved in discussions relating to how the Act will be implemented.
- The Scottish Executive announce that regulation of the security industry will be extended to Scotland.
- The BSIA liaises closely with the Association of Chief Police Officers on counter terrorism issues and the role of the private security industry and voluntary sector.
- Important work with the Department of Trade and Industry to review the role of e-commerce in the security industry.
- The BSIA wins a commendation for the work of its membership department at the Trade Association Forum Best Practice Awards. The BSIA website also receives a commendation.
- Operation Hawk-Eye, a partnership between the BSIA Transport Section and Greater Manchester Police, reduces the number of cash-in-transit attacks in the Manchester area by 73% in the first six months of the operation.
- The BSIA works successfully with Trade Partners UK to attract a record number of inward missions to attend the International Fire and Security Exhibition and Conference in May. Over 100 overseas visitors from eleven countries in Europe, Asia and Africa attend the Security Industry Awards evening, sponsored by the BSIA.
- Raid-control, a Police and industry retail robbery reduction partnership initiative, is launched for a six-month trail by Greater Manchester Police in March. The BSIA is a member of the steering group and has supported the promotion of the initiative.
- There is a 30% reduction in the number of false alarms in England and Wales, following the introduction of the latest Association of the Chief Police Officers' Security Systems Policy. There is also a 24% reduction in the number of alarm activations in Scotland, following the introduction of their first ever systems policy.
- The BSIA forms a Common Interest Working Group to address the issue of successfully integrating manned security and electronic security products. The Group aims to identify cost-effective solutions for end-users, as the cost implications of regulation of the manned security sector become apparent.



### Statistics

#### Estimated UK industry turnover (2002)

Sector	Turnover (£millions)
Access Control	288
Cash & Property Marking	23
Closed-Circuit Television	440
Information Destruction	26
Manned Security Services (contract only)	1,792
Police & Public Services	63
Physical Security Equipment	331
Security Equipment Distributors	85
Security Equipment Manufacturers	188
Security Systems	660
Transport	479
<b>TOTAL</b>	<b>4,375</b>

#### Guarding sector in UK in 2002

- 8000 private security companies
- 2433 million Euros of annual turnover (guarding companies)
- 315000 employees (private security agents)
- 12500 "in house" security guards
- 110000 guards employed by affiliated companies

## ESTA

### Facts and initiatives

ESTA the European Security Transport Association was founded in 1975 and represents cash handling businesses throughout Europe.

The cash handling industry represents an important part of the entire cash cycle and it is very well aware of its responsibility assigned through this critical role.

The industry understands the necessity for co-operation in designing the Single European Payment Area – SEPA – together with commercial banks and national central banks. In addition, the industry is conscious of the need to keep cash competitive alongside other means of payment.

ESTA is taking a leading role in harmonising the legal environment of the European cash handling industry. It takes part in ongoing meetings with the E.U. Commission, UNI-Europa and CoESS regarding this subject and takes great efforts in contributing to the success of this collaboration.

The first difficulty one is faced with when seeking to compare or indeed harmonise the legislation and regulations governing the cash handling industry is that the definition and scope of activity for the sector varies from member state to member state with some countries demonstrating greater limitations.

National regulations are sometimes inadequate and do not guarantee the professionalism that the sector demands.

ESTA has appointed a working committee for E.U. enlargement with the objective to gather and disseminate information that will help new E.U. member countries to join efficiently from the cash handling industry perspective.



### Statistics

#### Security Transport Industry in 2002

	Number of companies	Number of Personnel	Number of Vehicles
Austria	4	500	200
Belgium	4	1130	400
Denmark	2	150	80
Finland	2	1100	120
France	14	9060	1540
Germany	159	6500	2439
Greece	3	800	320
Ireland	4	600	160
Italy	205	4300	1540
Luxemburg	4	200	70
Netherlands	8	1000	300
Portugal	5	1100	400
Spain	9	2250	750
Sweden	4	1700	300
UK	6	11000	2000
<b>EU 15 TOTAL</b>	<b>433</b>	<b>41390</b>	<b>10619</b>

Member's annual contributions :  
*decided at the Istanbul General Assembly in September 2002*

MEMBERS FROM COUNTRIES WITH :	PER MEMBER
less than 10.000 employees	4.000 euros
between 10.000 and 20.000 employees	5.000 euros
between 20.000 and 30.000 employees	6.000 euros
more than 30.000 employees	8.000 euros
Associated Members	1.500 euros

## Budget for 2003

*Based on the same level of annual contributions as for 2002  
 Decided at the Istanbul General Assembly in September 2002*

<b>FUNCTIONNING</b> (salaries, administrative expenses, travels, stationary..... )	67.500 euros
<b>MEETINGS, REPRESENTATION</b> (working committees, executive committees, boards.... )	21.500 euros
<b>COMMUNICATION</b> (Newsletter, website, annual report, documentaion, public relations....)	31.000 euros

CoESS Interim Financial Report (1/01/2003 - 31/08/2003) :

2003	Description	Budget	Debit	Credit
January	CoESS Paris account			17 500
	CoESS Brussels account			116 500
	<b>BALANCE 01/01/2003</b>			<b>134 000</b>
Jan-Aug	Secretariat Personnel Costs	45 000	45 000	
	Costs 2002	11 250	11 250	
	Secretary General travel expenses	18 000	8 532	
	Meeting costs	15 000	2 562	
	Executive Committee rep. costs	6 500	1 914	
	CoESS Newsletter	18 000	7 236	
	CoESS Website	3 000	3 000	
	Start up costs 2002		5 435	
	Stationery	4 500	3 850	
	CoESS Annual Report	10 000		
	European Commission	45 000		42 000
	Bank costs		500	
	<b>CONTRIBUTIONS</b>			
	2002 Czech Republic	1 000		1 500
	Slovakia	1 000		
	2003	93 000		58 250
	<b>SUBTOTAL</b>		<b>89 279</b>	<b>235 750</b>
	Transfert to savings account		50 000	
	<b>BALANCE 31/08/2003</b>			<b>96 471</b>

## Active members

### AUSTRIA

V.S.Ö.

Verband der  
Sicherheitsunternehmen  
Österreichs

Porzellangasse 37/17

1090 VIENNA

T: +43.1.319.41.32

F: +43.1.319.90.44

vsoe@aon.at

www.vsoe.at

### BELGIUM

APEG. - BVBO

Association professionnelle des  
entreprises de gardiennage

Beroepsvereniging van  
bewakingsondernemingen

Koningin Fabiolalaan 25

1780 WEMMEL

T: +32.2.462.07.73

F: +32.2.460.14.31

apeg-bvbo@i-b-s.be

www.apeg-bvbo.be

### DENMARK

AHTS/VABA

Federation of Employers for  
Security Appliances and Services  
in Denmark

Sundkrogskaj 20

21000 KOBENHAVN

T: +45.77.33.47.11

F: +45.77.33.46.11

ahts@hts.dk

www.hts.dk

### FINLAND

The Association of Support  
Services Industries

Etelaranta 10

(PO BOX 11)

00130 HELSINKI

T: +358.9.1.728.41

F: +358.9.1.768.77

ari.uutinen@falcksecurity.fi

### FRANCE

UFISS

Union Fédérale des Industries et  
Services de la Sécurité

Rue de la Croix Nivert 17

75015 Paris

T + 33 1 53 58 08 08

F + 33 1 53 58 08 09

ufiss@wanadoo.fr

www.e-snes.org

### GERMANY

BDWS

Bundesverband Deutscher Wach-  
und Sicherheitsunternehmen e.V.

Norsk-Data-Straße 3

61352 Bad Homburg

Postal Address:

Postfach 1211

61282 Bad Homburg

T + 49 61 72 94 80 50

F + 49 61 72 45 85 80

mail@bdws.de

www.bdws.de

### GREECE

EOA - Hellenic Security  
Companies Federation

7 Stadiou Ave

Syndagma Square

10562 Athens

T + 30 10 33 11 036

T + 30 10 33 14 405

F + 30 10 33 11 037

avraco@ath.forthnet.gr

www.eoa.gr

ENEA (HSIA) - Hellenic Security  
Industry Association

46 Panepistimiou Street

4th Floor, Room 122

106 78 Athens

T: +30 210 380 7133

F: +30 210 380 7133

enea@acn.gr

### IRELAND

SECURITY FEDERATION OF  
IRELAND

Donnelly Court - Donnelly Centre

Cork Street

Dublin 8

T + 353 1 45 40 439

F + 353 1 45 40 438

www.sii.ie

sii@eircom.net

### ITALY

ASSVIGILANZA

Associazione Nazionale di  
Vigilanza Privata

Via Calatafimi 9

20121 Milano

T: +39 02 58 32 55 29

F: +39 02 58 43 98 82

avvmoro@tin.it

fabriziopioietti@tin.it

fabriziopioietti@libero.it

### THE NETHERLANDS

VPB

Vereniging van Particuliere  
Beveiligingsorganisaties

Stephensonweg 14

4207 HB Gorinchem

THE NETHERLANDS

Postal Address: Postbus 693

4200 AR Gorinchem

T + 31 183 64 66 70

F + 31 183 62 11 61

vpb@zpg.nl

www.vpb.nl

### PORTUGAL

AES

Rue Embaixador Teixeira  
de Sampaio Nr 4, Sala 29

135-220 Lisbon

T + 351 21 392 71 00

F + 351 21 392 71 92

aes@bonag.pt

www.prosegur.pt

### SPAIN

APROSER - Asociación Profesional  
de Compañías Privadas de

Servicios de Seguridad

Villanueva 2 Oficina 11

28001 Madrid

T + 34 91 431 57 44/58 54

F + 34 91 578 00 10

aproser@telefonica.net

www.aproser.org

### SWEDEN

ALMEGA

Box 16 105

S-103 22 Stockholm

Visiting Address:

Blasieholmmsgatan 5

103 22 Stockholm

T +46.8.762.69.00

F +46.8.762.69.57

marcus.lindstrom@almeqa.se

www.almeqa.se

### UNITED KINGDOM

BSIA

British Security Industry  
Association

Security House

Barbourne Road - Worcester WR1 1RS

T + 44 1 905 214 64

F + 44 1 905 613 625

info@bsia.co.uk

www.bsia.co.uk

## Associated members

### CYPRUS

**CYPRESS ASSOCIATION OF SECURITY COMPANIES**  
PO BOX 21455  
1599 Nicosia  
Tel: +357 22 88 98 90  
Fax: + 357 22 66 75 932  
acta@ccci.org.cy

### CZECH REPUBLIC

**ASBS**  
**Association of Private Security Services of the Czech Republic**  
Na Florenci 1020/19  
110 00 Praha 1  
Tel: +420 222 711 661  
Fax: +420 222 711 661  
sekretariat@asbs.cz  
www.asbs.cz

### SECURITY CLUB

Zitná 1578/52  
PSC 120 00  
Praha 2  
Tel: +420 602 510 344  
info@securityclub.cz  
www.securityclub.cz

### ESTONIA

**ESTONIAN SECURITY ASSOCIATION**  
Madara 27  
10612 Tallinn  
Tel: + 372 6 403 431  
Fax: +372 6 403 432  
etel@online.ee  
www.security.ee

### HUNGARY

**BNSZ (ABSC)**  
**Association of Big Security Companies**  
Hauszmann Alajos u. 9-11  
1119 Budapest  
Postal Address:  
György Farkas BMK  
Németvölgyi ut 41. 2. ép. 112;  
1124 Budapest  
Tel: + 36 1 212 61 28  
Fax: + 36 1 1441 13 53  
y.farkas@uze.net  
www.bnsz.hu

### NORWAY

**SIKKERHETSBRANSJENS SERVICEKONTOR**  
Servicebedriftenes Landsforening  
Boks 5473 Majorstuen  
0305 Oslo  
Tel: + 47 23 08 86 54  
Fax: + 47 23 08 86 59  
oyvind.vestby@service.no

### POLAND

**SECURITAS POLSKA Sp. z.o.o.**  
u.l Cybernetyki 21  
02-677 Warszawa  
Tel: + 48 22 457 07 80  
Fax: + 48 22 457 07 05  
pawel.rafalski@securitas.com.pl

### SLOVAKIA

**ZOMO**  
**Personal & Property Protection Association**  
Trnavská ul. 112  
821 01 Bratislava  
Tel: 00.421.2.482.922.95  
Fax: 00.421.2.434.131.72  
info@ososec.sk  
www.zomo.sk

### SWITZERLAND

**ASSC (VSSU)**  
**Association of Swiss Security Service Companies**  
Alpenstrasse 20  
Zollikofen / Bern  
Postal Address:  
Case Postale  
3052 Zollikofen/Bern  
Tel: + 41 31 910 17 57  
Fax: + 41 31 910 14 15  
info@vssu.org  
www.vssu.org

### TURKEY

**GÜSÖD**  
**GUVENLIK SISTEMLERI VE GOZETIM ORGANIZASYON DERNEGI**  
Kisikli Mah. Bulgurlu Cad. No. 22  
K. Camlica  
Istanbul  
Tel: + 90 216 428 30 00  
Fax: + 90 216 326 05 04  
info@gusod.com  
www.gusod.com

## Corresponding member

**ESTA**  
**European Security Transport Association**  
Rue Mercelis 19  
1050 Brussels  
BELGIUM  
T + 32 2 758 13 90  
F + 32 2 759 43 70  
esta@tjtd.com

# CoESS Members

## year 2003



Confederation  
of European  
Security  
Services



Austria  
VSÖ



Italy  
ASSVIGILANZA



Belgium  
APEG-BVBO



Netherlands  
VPB



Cyprus  
CASC



Norway  
SIKKERHETSBRANSJENS  
SERVICEKONTOR



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ASBS + SECURITY CLUB



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AHTS/VABA



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AES



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ESA



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ZOMO



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ALMEGA



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BDWS



Switzerland  
ASSC



Greece  
ENEA + EOA



Turkey  
GUSOD



Hungary  
BNSZ (ABSC)



United Kingdom  
BSIA



Ireland  
SFI



Corresponding Member  
ESTA



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CoESS and members  
CoESS General Secretariat :  
Koningin Fabiolalaan 25,  
B-1780 Wemmel  
Tél. : +32 2 462 07 73 -  
Fax : +32 2 460 14 31  
e-mail :  
apeg-bvbo@i-b-s.be  
www.coess.org

CoESS Registered Office :  
17 rue de la Croix-Nivert  
F-75015 Paris

www.coess.org