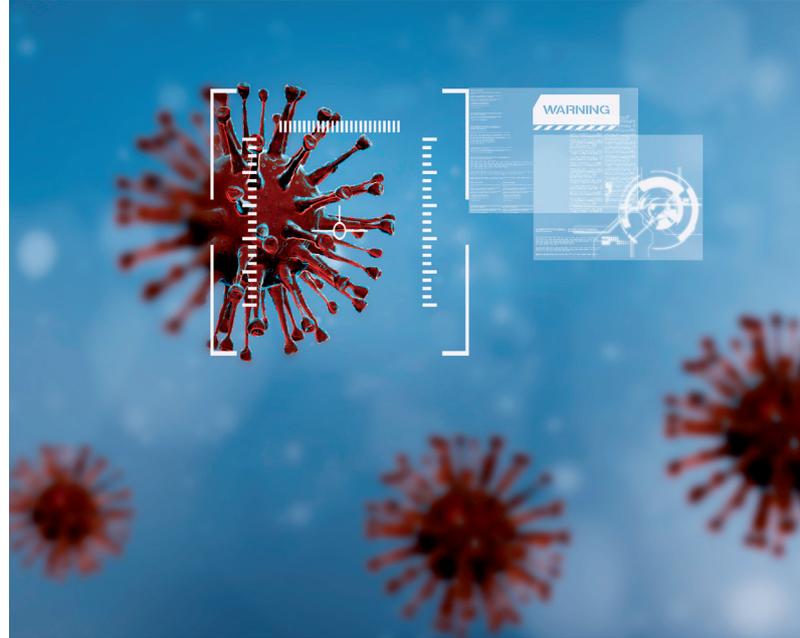




Acting as the voice of the **security industry**

Confederation of European Security Services



The New Normal 2.0: Private Security and COVID-19 in Europe

A Strategic Review and Foresight

WHITE PAPER

October 2020

In memoriam



This White Paper is dedicated to
Claude Lévy, co-Founder and Honorary Chairman of CoESS and
initiator of the European Social Dialogue in Private Security,
who passed away on 24 September 2020.

Up until his 90th birthday,
Claude attended almost every meeting of
the CoESS Social Dialogue and
Board of Directors.

This is a tribute to his unwavering commitment to the industry and
its people, to pursuing common interests and promoting conciliation.
A true European, Claude made friends in the industry wherever he went and
was a believer in the human factor that is at the heart of both
the industry and its associations.

With our respect, gratitude and affection.

Table of Contents

Foreword	4
Executive Summary	6
Testimonials from European private security officers	8
Private Security in 2020: A Critical Occupation	9
Economic impact of the pandemic on the private security sector	11
The pandemic: amplifier and accelerator of change	16
Ten recommendations towards a safe and sustainable recovery	21

Foreword

When we published our White Paper on the Security Continuum in the New Normal one year ago, we had no idea that a few months later we would be faced with the worst pandemic in modern history. We had not envisaged that one year after, we would be publishing a new White Paper, discussing a “newer” New Normal, hence the title: New Normal 2.0.

As for every industry and for every person, COVID-19 has been and still is a shocking new reality that we have to deal with on an everyday basis. Our economies, our societies, our certainties and what we took for granted, such as the freedom to move and travel, freedom to enjoy cultural events, moments with friends or colleagues at the restaurant, have all been shaken. The methods of working and meeting are radically changed, with possible new habits being set for the long term. The boundaries between our countries within the EU have been temporarily erected again, the freedom of movement is still inhibited by a range of travel restrictions, and entire sectors such as transport, tourism and live performances are until today severely affected by the situation. These restrictions severely affect our industry.

Drastic decisions were taken by governments, in order to protect the health system and to prevent hospitals from being overwhelmed. Images from Italy, where the pandemic first hit Europe, were extremely shocking and anything had to be done in order to save lives. Life as we had known it for many years, came to a complete standstill. In this sudden silence, the only sounds we could hear were those of the people who had no choice but go out and work to make sure the basic needs of society were met, for food and hygiene, for safety and security. Those working in the health system, emergency services, the cleaning and disinfection sector, food and fast-moving consumer goods supply chains, supermarkets, waste collection and processing, and private security services, were there to help. They took risks at a time where the virus was less known than it is today, some without any protection – as they were just not available – and

went out not knowing whether they were risking their lives and the lives of their families by doing so. And yet, they did take these risks, and quickly became heralded and applauded by those who were safe at home during confinement.

Private security officers would protect empty offices, support access control in hospitals and retirement homes, manage visitor flow and implement security measures in shops, transport cash and valuables, secure the supply chain and Critical Infrastructure.

After several weeks of lockdown, other measures were taken to allow the economies to start again. And at the time of writing this Foreword, Europe is dealing with a “second wave” of infections and with new restrictive measures on leisure and travel.

Meanwhile, the terrorist threat has not gone away, as the most recent Europol TE-SAT report indicates, and as shown in recent attacks in Paris during the Charlie Hebdo trial in September 2020.

This White Paper is describing how the COVID-19 pandemic has affected and is still affecting Private Security Companies and underlines what the pandemic has made even clearer: Private Security is a critical occupation. While it has been recognised as such by several Heads of State and leaders in Europe, this is not necessarily transposed into facts. In the Paper, we make clear requests to this end.

We have invited several of our Board Members and other industry leaders to give their testimonials. We also feature testimonials by 3 private security officers in different countries, showing how seriously and professionally they take their mission.

After many years of leading CoESS, I want to also point out how relevant and useful our organisation remains. We have consulted our members on our role during and beyond this crisis, and this is a list of important missions, which our membership expects our Board and our Team to deliver on:

- Use our network to collect and exchange information, so that we can widen the range of solutions and options for our members. Continue to build the good image of private security companies and promote best practice.
- Stress the importance of best value procurement and good contracting practices, which is now more important than ever. Emphasize our role in protecting and, thereby, enabling the functioning of what is most precious to society: its Critical Infrastructure, including land, sea and air transport.
- Highlight our role in protecting public spaces, in cooperation with Law Enforcement Agencies, within the Security Continuum.
- Lead by sharing ideas, solutions and strategies, developing and disseminating new trends, to stimulate innovation and creativity.
- Increase our visibility and make our voice heard. Form or join strategic alliances with other organisations that share our objectives.
- Continue to develop strategies to enhance the importance of private security in all locations and in those that are critical not just for private interests but for society as a whole: in aviation, cash management, control rooms, maritime and port security.

It is a long journey to increase our recognition and the pandemic has exacerbated some of our demands and made them urgent. In the previous White Paper, we highlighted the convergence between a number of factors, including maturity and professionalism, increased use of technology, and asked for an actual Security Continuum to be put in place. We greatly appreciate the European Commission's awareness and statements, both in legal documents and direct engagement with CoESS at EU-level, that private security provides essential services. This needs to be heard and implemented in a harmonized way in every country in Europe and beyond.

It's not too late. But it's high time.



Marc Pissens
Chairman, CoESS

Executive Summary

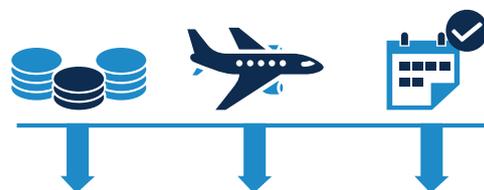
The COVID-19 pandemic has changed the world as we knew it. Healthcare workers have shown enormous sense of duty to save people's lives. Since months, European citizens are subject to public health and safety measures that impact their daily lives.

In this new, unstable reality, private security services support the efforts of frontline workers and have proven to be essential for the functioning of our economies, not only during lockdowns but also now that policymakers, medical experts and businesses are trying to find the right balance of measures for a safe and secure economic recovery.

Private security services have always been essential for safety and security in many different locations – most importantly at Critical Infrastructure and in public spaces.

What is different now is the level of recognition that the industry receives in many countries – by Heads of State, law enforcement, and the public. The often hidden workforce of 2 million security officers has rightly been celebrated as “everyday heroes”. Private security officers help European citizens stay safe and navigate through this unprecedented health crisis when shopping, going to work, travelling, and visiting beloved ones in hospitals and retirement homes.

Still, the economic impact of the pandemic on the industry is severe. New services, related to the implementation of public health and safety measures, can by no means compensate for the drastic slump of business activities in Cash & Valuables in Transit (CIT), aviation and event security. Many private security companies will struggle retaining a much needed workforce, if the economic crisis endures. Especially smaller companies, which are specialised in most affected business segments, may fear for their very existence.



In some countries, these challenges are exacerbated by bad contracting practices and insufficient support of a profession that requires special attention and recognition, given the mission of safety and security it must carry out.

It is crucial that lessons be drawn from the experience – good and bad – of the past months. These must lead to a positive reinforcement of what worked well, and corrective actions for what didn't. The crisis must be used to reduce vulnerabilities and increase preparedness and, hence, resilience. Experts have warned already years ago against the risk of a pandemic and, given the already polarised opinion of society with respect to their authorities' lack of preparation, another ill-prepared crisis may have even more severe consequences.

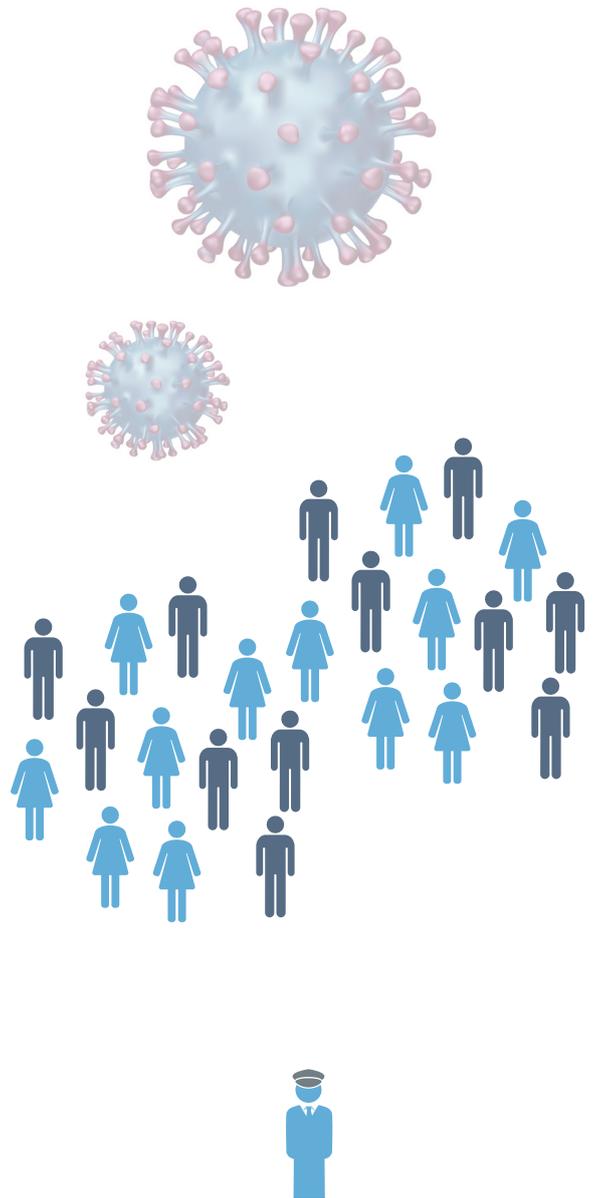
It is undeniable that, for private security companies as well as other industries, the COVID-19 pandemic is an accelerator and amplifier of change. The recognition of the sector in most countries may, hopefully, lead to a better public-private collaboration in the future. The deployment of smart technologies will certainly be accelerated. And the securitisation of health that we witness is likely leading to a better consideration of biological risks in integrated and coherent security frameworks – probably with some new services to last in a post-COVID-19 world, which, as history has shown, is unfortunately likely to experience future episodes of pandemics.

But there are many challenges to face: the economic situation of the sector, lack of skilled workers, new training needs, threats to public security and, in some countries, a very weak or damaged Security Continuum.

To be more adapted to manage the current situation and future crises, policymakers at national and EU-level must act now. The recognition of the private security sector must finally lead to political action – shaping the Security Continuum, implementing good procurement and contracting practices, and, where required, modernising sectoral regulation. Financial aid and sector-specific solutions are needed, also in transport, tourism and live performances. The ongoing “War on Cash” must stop. And we need an effective coordination of the crisis and recovery at EU-level.

To support policymakers in this task, CoESS provides in this White Paper ten concrete recommendations for a safe and sustainable recovery:

1. **Delivering on the Security Continuum: Recognition and public-private collaboration**
2. **No compromise of security levels, particularly at Critical Infrastructure and public spaces**
3. **Implementing best value procurement based on quality criteria**
4. **Promotion of good contracting practices**
5. **Financial aid and support**
6. **Extension of short-time work frameworks**
7. **Act on the War on Cash**
8. **Solutions for training, up- and reskilling**
9. **Keep private security regulation adapted to new realities**
10. **Coordination at EU-level**



Testimonials from European private security officers



Ian McCulloch, Mobile Patrol Officer with Securitas UK, member of the British Security Industry Association (BSIA):

“Throughout the coronavirus pandemic, our roles have been even more demanding. We’ve had to be even more vigilant and carry out extra duties with added responsibilities. As critical workers, we are essential in helping to prevent the spread of the virus. COVID-19 is on my mind all the time and I’m proud of the work I do. I feel a huge sense of pride knowing that I’m helping prevent the spread of the virus and keeping people safe.”

Heiko Weller and Tobias Reinhardt, Private Security Officers for local public transport with Condor Security Services, member of the Bundesverband der deutschen Sicherheitswirtschaft (BDSW):



© Ralf Ehrlich/Thüringer Allgemeine

“As employees in the control service, we have always been service personnel for our clients’ customers and contribute to the feeling of safety and security. Since COVID-19, we have also been responsible for the observance of hygiene regulations, in particular the correct wearing of mouth-and-nose protection. In this way we not only ensure that the risk of infection is minimised. Especially for persons at risk, our regular activity is also a precondition for using public transport. Due to our clear recognisability as security personnel and our good cooperation with the police, we can also quickly mediate possible escalations between mask refusers and the other passengers”.



Cédric G, Site Manager (SSIAP 3) of a tower at La Défense/Paris with DPSA, member of the Groupement des Entreprises de Sécurité (GES):

“We had to adapt our work to the health and safety protocols imposed by the French Ministry of Health. There was a lot of internal communication to establish respective protocols and processes. All of the tenants of the tower that we are protecting were approached and briefed about clear instructions – that’s what our clients expect from us. In practice, we now have to do more preventive work on a daily basis and remind people of the instructions and Infection Prevention and Control measures. This includes signage and instructions on the proper use of disinfection stations and masks, physical distancing rules, and clear deterrence of non-compliance with the rules and regulations. I also take the opportunity to raise the average skill level of my teams. What I now see is that we are better perceived by the people who rely on us. Tower users know more than ever that we are there to help them! This crisis will further strengthen the public’s view of human surveillance.”

Private Security in 2020: A Critical Occupation

Since the COVID-19 pandemic has been sweeping the world, European citizens have been living in a new normal that is in continuous flux.

A few weeks into the crisis, it became clear that certain categories of workers and employees were essential to the functioning of society and were rapidly acclaimed by citizens and politicians alike. Alongside healthcare and emergency services, everyone acknowledged all categories of “invisible heroes” who were on the frontline and helped the population and society deal with the essential needs for food, hygiene, safety and security, as well as mobility.

It also became clearer that Private Security Services and their workforce were critical for the functioning of our economies.

While many countries across Europe introduced strict lockdowns, private security officers supported law enforcement and the ranks of frontline workers to uphold public safety and economic activity:

- The continued protection of land, air and maritime supply chains by private security was essential, particularly to uphold the transport of medical supplies, food and cash.
- Public and private clients maintained the guarding of their premises, which in many cases had been deserted.
- Private security officers were called in to implement infection prevention and control (IPC) measures at hospitals, social care facilities and supermarkets.
- Private security guaranteed business continuity at Critical Infrastructures.

As in previous crises, private security demonstrated that it is not just any kind of service. It represents an often-hidden workforce of more than 2 million private security officers in Europe that is present in people’s everyday lives and there to help.

It is only logical that many European governments, and the European Commission¹, officially recognised private security as an “essential service” or “critical occupation” at the beginning of the COVID-19 situation.

In many countries, the industry received praise across political leadership and law enforcement for its role in managing the crisis that shackled public life for several months:



Eduardo Cobas Urcelay

Secretary General, Asociación Profesional de Compañías Privadas de Servicios de Seguridad - APROSER (Spain)
Chairman, CoESS Social Dialogue Committee

“Private security officers have played a remarkable role during the worst periods of the COVID-19 crisis and they remain fully committed to playing a similarly relevant role in the slow and progressive return to the so-called new normality. They have demonstrated their significant added value for the citizens’ protection, as well as security and safety of the Spanish society as a whole. More than ever, the private security sector, which was already considered by the Spanish government as an essential service regarding a considerable amount of the services provided, constitutes a relevant piece of the country’s security system that merits a greater and explicit public recognition.”

¹ Communication from the European Commission: Guidelines concerning the exercise of the free movement of workers during COVID-19 outbreak (2020/C 102 I/03).

- Different public authorities in Spain, in particular the National Police² and Guardia Civil³, specifically praised the work being carried out by the Spanish private security sector and the more than 100,000 guards in managing the COVID-19 crisis. Their performance would not only help the Security Forces in the day-to-day protection of people and property, in supermarkets, hospitals, health centres, and other services. With their support, they would also help stopping the spread of the virus.
- The National Director of the Portuguese Public Security Police, Magina da Silva, demonstrated in a dedicated note⁴ the solidarity of the police with the private security sector, “which is present in this hour of need”, and “who are at the forefront of interacting daily with the public in these particularly difficult circumstances in complementarity with public security forces”.
- Heads of State such as French President Emmanuel Macron and Belgium’s Prime Minister Sophie Wilmès thanked all those who continued to contribute to the functioning of public life, including private security staff.

Across European newspapers, private security officers working in hospitals, supermarkets, supply chains, Cash & Valuables-in-Transit (CiT) and Critical Infrastructures were rightly recognised as everyday heroes.

Such appreciation plays an important role for a workforce that supports the ranks of frontline workers in this unprecedented public health crisis.

Since the strictest containment measures were lifted within early summer 2020, the CoESS members witnessed a new demand on private security personnel as the sector and its workforce would play a critical role for the re-opening of our societies and businesses. Retailers, hospitals and offices have important staffing needs in order to make access to their buildings and premises compliant with public health measures, such as physical distancing, maintaining correct mask usage and disinfection procedures. In some countries, private security companies also support the protection of test-centres.

What we have been witnessing is the emerging concept of “securitisation of health”. In this enduring public health crisis, private security has demonstrated that it is a critical pillar of trust to make the public and clients feel secure – supporting a safe and sustainable recovery.



² APROSER (2020, March 30). La Policía Nacional agradece la inestimable labor de los vigilantes de seguridad en la crisis sanitaria. (<https://www.aproser.es/2020/03/30/la-policia-nacional-agradece-la-inestimable-labor-los-vigilantes-seguridad-la-crisis-sanitaria/>)

³ APROSER (2020, April 07). La Guardia Civil agradece el trabajo de los profesionales de la seguridad privada. (<https://www.aproser.es/2020/04/07/la-guardia-civil-agradece-trabajo-los-profesionales-la-seguridad-privada/>)

⁴ Security Magazine (2020, March 25). PSP Agradece Colaboração Dos Profissionais De Segurança Privada. (<https://www.securitymagazine.pt/2020/03/25/psp-agradece-colaboracao-dos-profissionais-de-seguranca-privada/>)

Economic impact of the pandemic on the private security sector

General observations

Still, the pandemic has negative economic consequences for the entire private security industry – despite its role in managing the public health situation.

It is still too early to present economic indicators for the entire European private security market, but many CoESS national associations report that new service demands compensate by no means the collapse of entire business segments.

What can be witnessed is that the economic impact of the pandemic on the private security sector strongly depends on the specific business segments in which companies are active.



Alberto Ziliani
Board Member, Federsicurezza (Italy)
Member of the CoESS Board of Directors

“The security industry suffered a severe hit during the emergency. We could see a reduction in security services in some specific sectors (railway, aviation, maritime), while it was necessary to adapt to increased market demand in other sectors, such as health services and retail, to save employees. This situation resulted in the need to transfer personnel with specific qualifications and training to other sectors.”

From Germany, Dr Harald Olschok, CEO of the Bundesverband der deutschen Sicherheitswirtschaft (BDSW), reports: *“Aviation security, event security or CiT are severely affected by the crisis, sometimes to an extent that threatens the very existence of companies. On the other side, the security industry has taken over new tasks very fast, for example control of hygiene rules in supermarkets and retail stores with different qualifications of the guards. We’ll see in the near future how the overall economic development will affect the security services industry”*. The same trends are witnessed across Europe. Also Mike Reddington, Chief Executive at the British Security Industry Association (BSIA), reports that those companies operating in CiT, aviation and events have seen their income streams dramatically eroded with revenue decreases of more than 85%.

Companies with a more diverse service portfolio are thereby likely to be in a better position to cushion the impact of the pandemic, depending on the national economic situation. Bill Brown, Chairman of Manguard Plus (CoESS company member) from Ireland, reports for example that *“The event sector ceased in its entirety from mid-March to end of June, but the economic impact of the pandemic on our overall business was quite small. We saw an immediate reduction in hours worked of approximately 8.5%, but this has crept up again over the months to only 2-3% of the pre-COVID-19 activity levels”*. Mike Reddington from BSIA confirms that those companies that only see a low to medium impact are citing their move to diversification in services provided.

The overall situation of the industry is however very concerning: 75% of CoESS’ national associations reported in a survey conducted in April 2020 that the lack of liquidity is a problem for companies. Shrinking market demand is often exacerbated by bad contracting practices.

And the situation may worsen. CoESS has observed in the past that the private security industry generally follows the economy up or down, albeit with a slight delay. Andre Lilleleht, Executive Manager at the Estonian Security Association ETEL, confirms: *“At the moment, we cannot see a recession in traditional security services, but we can expect a significant decrease in the turnover of security companies in Q1 2021. Many companies providing security services are now forced to review their fixed costs”*.

Larger companies can be expected to be more resilient to the economic impact of the pandemic thanks to strong working capital and cash flow as well as more robust clients and contracts. CoESS however worries that especially small- and medium-sized companies and/or those that are specialised in most affected service segments, such as aviation and event security, face severe difficulties to keep the business running and to retain their employees – workers that will be desperately needed once the economic activity picks up again.

Guarding and security solutions

The impact of the pandemic on guarding, and security solutions in general, strongly depends on the business segment.

Since the lockdown started, the private security industry has seen an increasing demand in providing guarding and **new IPC-related services** in supermarkets, hospitals and retirement homes. More clients have ordered cameras or access control kiosks. Meanwhile, services for Critical Infrastructure Protection (CIP) were maintained. With the start of the summer season and the lifting of containment measures, the industry saw an increasing demand in the tourism sector.

On the other hand, many clients **scaled down property protection** services during lockdown with employees working from home, and continuing to do so in order to save fixed costs.

The **collapse of the event security business** is particularly severe: the cancellation of festivals, concerts and other cultural events is without precedent; soccer games and other sports events across the continent were cancelled or being held without an audience; big trade shows were postponed to the next year. Companies that are specialised in event security services saw their revenue going down to zero.

Recovery of the events sector is expected to be slow.

Since June 2020, Bill Brown from Manguard Plus reports only a slow pick-up on the number of venues holding “regular” events, such as sports events, without spectators – which reduces security requirements during the event to approximately 30%. As it stands today, he expects this situation to continue until the end of 2020.

In a joint statement published in June 2020, 99 organisations from across Europe’s cultural and creative sectors warned that, according to the European Commission’s own estimates, parts of the industry are expected to lose up to 80% of their turnover in the 2nd quarter of 2020⁵ – a development which is likely to seriously impact the event security industry.

⁵ Joint Call: Investing in Europe’s next generation by investing in culture (2020, June 18)
(<https://www.pearle.eu/positionpaper/joint-call-investing-in-europes-next-generation-by-investing-in-culture>)

Aviation security

The impact of the COVID-19 pandemic on air traffic is unprecedented – with devastating consequences for aviation security services.



Friedrich P. Kötter

Vice-President, Bundesverband der deutschen Sicherheitswirtschaft – BDSW (Germany)
CoESS First Vice-Chairman and Chairman of the Aviation Security Committee

“The associated slump in sales is immense and threatens the very existence of security service providers whose business activities focus exclusively on passenger screening”.

Airports and airlines report numbers that threaten the very existence of the industry: In April 2020, practically all of Europe’s largest airports managed 90% fewer flights compared to 2019.⁶ Still in September 2020, Eurocontrol reported a decline of more than 50% in air traffic compared to 2019. Provisional data for August 2020 from the Airport Council International (ACI) indicates that the passenger numbers through European airports are down 69% compared to 2019.⁷

According to the International Air Transport Association (IATA), passenger demand is expected to reach a pre-pandemic level only by 2024.⁸ The pandemic may have a long-term impact on passenger flow and the entire aviation industry in general, as Friedrich P. Kötter, Chairman of the CoESS Aviation Security Committee, explains: *“It is important to distinguish between holidaymakers and business travellers. While the number of holidaymakers will normalise more quickly, the volume of work-related travel will certainly take another four to five years to reach the 2019 level. Numerous business trips are being compensated for, above all by the use of video conferences – these have shown in recent months that they can be a real alternative. This results in a significantly lower volume of screening, which also requires fewer personnel for screening. And even if passenger numbers have reached the past level in a few years, the subsequent growth will be significantly slower than we have been used to in recent years”.*

In practice, this collapse of passenger flow has a massive impact on the operations of aviation security services. Many aviation security companies responsible for passenger screening were forced to conclude company agreements for short-time work in order to secure jobs – a very important aspect for aviation transport in general: As soon as a “regular” air traffic can be resumed, all aviation security forces are rapidly required back at the airports. Without them, a recovery of flight operations will not be possible. But if companies have to terminate contracts, or if aviation security officers switch jobs to services that benefit from a faster recovery, airports across Europe will face a serious problem of labour shortage at security checkpoints.



⁶ EUROCONTROL (2020, April 15): Comprehensive Assessment of COVID19 Impact on European Air Traffic (<https://www.eurocontrol.int/sites/default/files/2020-04/covid19-eurocontrol-comprehensive-air-traffic-assessment-14042020.pdf>)

⁷ EUROCONTROL (2020, September 02): Comprehensive Assessment of COVID19 Impact on European Air Traffic (<https://www.eurocontrol.int/publication/eurocontrol-comprehensive-assessment-covid-19s-impact-european-air-traffic>)

⁸ IATA (2020, July 30): Five years return to the pre-pandemic level of passenger demand (<https://www.iata.org/en/iata-repository/publications/economic-reports/Five-years-to-return-to-the-pre-pandemic-level-of-passenger-demand/>)

Cash & Valuables in Transit (CiT)

The COVID-19 pandemic has also presented the CiT services with major challenges and accelerated trends of online and cashless payments – threatening the future of a business segment that is essential for society and the economy.

At the beginning of the crisis there was a particularly strong demand for cash among the population. Many CiT companies had to make special trips to fill ATMs or to supply banks with cash. Private security officers provided an essential service during the months of lockdown to guarantee people's access to cash.

However, this strong demand collapsed within a very short time due to strict lockdowns in retail, closing of trade and, importantly, the recommendations of large retail chains to pay cashless. As a consequence, sales of CiT companies fell dramatically.

Unfounded and unproven fears of contamination through cash, unnecessarily adding to the extreme stress and fears of the population at a time when many European countries are going through unprecedented measures, continue to take their toll on the use of cash, in a way which may be lasting long after this crisis is over. Payment operators have used these fears to call for an increase in contactless payments limits, including their cumulative thresholds and numbers of contactless transactions within this limit. A number of retail shops have started refusing cash altogether.

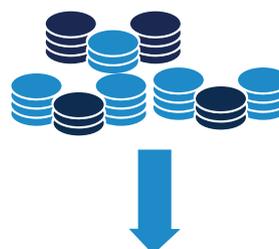
There is a risk that the trend towards cashless payments will perpetuate during and after the crisis, with long-term negative consequences for the development of the entire industry.



Thierry Lebeaux

Secretary General, European Security Transport Association (ESTA)
Member of the CoESS Board of Directors

"The COVID-19 crisis has accelerated the 'war on cash'. The lockdown of our economies has led to an increase in online purchases and reduced the opportunities for households and consumers to pay in cash. Some operators have used the pandemic and the public's fear to promote their business and have gone as far as affirming that with COVID-19, "the use of cash is extremely risky."





Maritime security

The shipping industry in Europe and around the world is going through a critical moment and experiences significant losses due to the pandemic. This has a direct impact on the provision of private security services.

The situation is particularly severe in the passenger ship sector. The cruise ship industry may take up to five years to reach the same volume as prior to the pandemic. Tonći Prodan, Member of the CoESS Maritime Security Committee from

the Croatian Security Association, reports that *“in the first 6 months of 2020, only 50% of last year’s turnover was realised in maritime and coastal sea transport in Croatia. In addition, the cruise ship sector practically came to a complete halt. Consequently, maritime operators have lower revenues and can spend less for private security officers”*.

In comparison, tankers and chemical vessels witnessed only a small decrease thanks to long-term contracts. Across the globe, 90% of all trade is transported by ships. Due to the importance of shipping for global trade, Johan Ohlsson, Chairman of the CoESS Maritime Security Committee, expects that maritime trade volumes will recover, but not before mid-2021 – depending on the ongoing pandemic situation. *“We have already seen a slow increase in volumes and port calls in Europe and this will certainly continue”*, he says. *“The maritime security services industry stands ready to respond to growing demands at every moment. Port security is essential to run international trade, goods and passenger transport in a safe and secure way”*.



Johan Ohlsson

Säkerhetsföretagen (Sweden)

Chairman, CoESS Maritime Security Committee

“Maritime security services are crucial to keep maritime value chains running and are broadly accepted as an “essential service” – something that needs to be reflected in the training of private security officers and procurement practices. The fact that the maritime security services were broadly maintained at ports reflects the importance of well-trained, experienced and professional security officers to ensure the business continuity of global supply chains in a safe and secure environment”

Bad contracting practices

In addition to a difficult financial situation, in April 2020, 50% of CoESS’ members reported that both public and private buyers had in a number of cases adopted bad contracting practices, including: unilaterally scaling-down or suspending services without bridging agreements, extending or suspending payment terms, or forcing contractors to lower rates that compromise quality and collective agreements.

Such practices exacerbate the existing financial difficulties of the industry and strongly contrast with the critical role that private security plays in managing the COVID-19 situation. The most recent “2020 Strategic Foresight Report” of the European Commission rightly states: *“For small businesses, late payments can make the difference between survival and bankruptcy, and compromise their ability to pay employees and suppliers, operate, produce and grow”*⁹.

With the risk of an economic crisis in the years to come, CoESS is very concerned that such bad contracting practices will have a severe impact on the sustainability of private security businesses and their ability to retain much needed workers – a development, which would hit the sector hard.

⁹ European Commission (2020, September 09): 2020 Strategic Foresight Report. Charting the course towards a more resilient Europe (https://ec.europa.eu/info/sites/info/files/strategic_fore sight_report_2020_1.pdf)

The pandemic: amplifier and accelerator of change

For the industry and its workers, but also for entire business ecosystems and public security at large, it is important that the private security industry not only recovers from this crisis, but emerges more resilient.

To do this, we have to look forward, draw lessons from the past months, anticipate future developments, and find the right answers now. This process must take into account existing drivers of change and the impact of the pandemic.

Already before the pandemic, the private security industry had been evolving at an unprecedented speed – a development that CoESS has accompanied in detail during the past years^{10 11}. The industry is impacted by many drivers of change for the years to come, as shown in a joint EU Sectoral Social Partner Study of CoESS and UNI Europa from 2018, which was funded by the European Commission¹².

It is likely that the COVID-19 pandemic will amplify and accelerate these drivers of change. At this point in time the recognition of the critical role that private security plays, not only in times of crisis, needs to be finally translated into concrete political action. New services may further push the technological change in security solutions.

At the same time, the pandemic may make existing challenges even more critical, and introduce new ones.

Translating recognition into action

The appreciation of the work of private security officers during the pandemic and the growing awareness in many countries that private security is critical for the functioning of economies and public life bears the chance that recognition be translated into political action, as and where needed.

In some countries, prior to the pandemic, CoESS had already witnessed a positive development in sectoral regulation and an improving recognition of the industry among law enforcement and public authorities.



Alberto Ziliani

Board Member, Federsicurezza (Italy)
Member of the CoESS Board of Directors

“Carefully analysing the tragic events we are witnessing until today, we have to take the opportunity to prepare the necessary and adequate actions for recovery. We need to prepare, implement and verify all the activities necessary to protect companies in the long-term in a broad sense.”



Dr Harald Olschok

CEO, Bundesverband der deutschen
Sicherheitswirtschaft – BDSW (Germany)

“The security industry proved that it is able to adapt very fast to extraordinary situations like this and to take over new tasks. We have shown our strengths and the fact that we are of systemic importance in modern society.”

¹⁰ CoESS and BDSW (2015, April 23): The New Security Company.
(<https://coess.org/newsroom.php?page=white-papers>)

¹¹ CoESS (2019, October 10): The Security Continuum in the New Normal.
(<https://coess.org/newsroom.php?page=white-papers>)

¹² Baker P., Broughton A. (2018, October): Anticipating, Preparing and Managing Employment Change in the Private Security Industry.
(<https://coess.org/projects-and-standards.php?page=anticipating-change>)

Still, legislation needs to be forward-looking and draw lessons from the pandemic. Security legislation is a living and maturing process that is regularly adapted to the current context.

The industry is ever evolving and it often takes a crisis to focus on the next steps of evolution.

The expectation is that the industry will come out of this crisis with a better recognition from the clients and businesses that need its support – a recognition that must translate into better public-private cooperation, good contracting practices, the better recognition of quality criteria in public procurement, and public awareness. Tonći Prodan from the Croatian Security Association adds that *“Private security work is certainly one of the most misunderstood jobs of our time. It would now be desirable for the competent authorities and educational institutions to be more engaged in bringing security work closer to the general population in order for them to understand its importance”*.

Securitisation of health

The pandemic also acted as a driver of change in the innovation and deployment of new security solutions, responding to the “securitisation of health”.

Since the beginning of the crisis, both public and private clients have been demanding new private security services related to the implementation of IPC procedures at their premises:

- **Access control:** This has always been a traditional guarding task, but demand for new services increased at critical public health locations such as hospitals, test-centres and retirement homes, generally in combination with services listed below. Existing services, for example in aviation and maritime transport, got complemented with the implementation of IPC measures.
- **Capacity control:** Many premises, such as the retail sector and office buildings, have to abide by a maximum number of visitors and staff, which is controlled by private security officers and, in some cases, flow management equipment.
- **Physical distancing, disinfection and mask usage control:** Private security officers are making sure that IPC measures are abided by at numerous locations, including in the retail, transport and tourism sectors. Some companies even test the use of UVC light to disinfect spaces.
- **Thermography:** The detection of temperature levels by trained personnel or technical means is an extension of access control missions used at various locations such as airports, factories, banks, offices, and hospitals. It can complement other public health and safety measures to help contain the spread of COVID-19, and must take place under clear conditions with respect to legal competencies of private security officers and data protection law. The European Data Protection Supervisor has in this regard released a very useful guide on the implementation of body temperature checks at EU Institution buildings¹³, including recommendations on compliance with the EU General Data Protection Regulation (GDPR), technical provisions, as well as important procedures and training to be put in place for security and medical staff.

¹³ European Data Protection Supervisor (2020, September 01): Body temperature checks by EU Institutions in the context of the COVID-19 crisis. (https://edps.europa.eu/sites/edp/files/publication/01-09-20_edps_orientations_on_body_temperature_checks_in_the_context_of_euis_en.pdf)

Private security companies often offer a complete suite of abovementioned solutions to monitor the respect of IPC protocols and prevent the spread of SARS-CoV-2, and the pandemic has clearly driven the deployment of new technologies for this purpose. Whether the market demand for such services will remain high will strongly depend on the development of the pandemic.

Still, CoESS expects that there will be a need for integrated and coherent security frameworks which consider the relevance of biological risks in a post-pandemic world.



Bill Brown

Chairman, Manguard Plus (CoESS Company Member)

"Many clients are waiting 2021 before they make decisions on how they will manage the future of their business and work practices. If by then, the pandemic is 'controlled', there may be no major change in the short to medium-term for the industry and the matter only becomes another compliance and safety issue that is to be managed on behalf of the client by the security personnel. Alternatively, should the environment continue to be one where the number of interactions between people is a key decider in the spread of the virus, then the ability to provide access control, system monitoring and security patrolling remotely will be key."

Another push for technological advancements

The pandemic will likely accelerate the integration of smart technological solutions in "traditional" guarding services – a development described in the CoESS White Paper on "The New Security Company"¹⁴.

Accelerating the incorporation of technology in the provision of private security services is compatible with the essential role of the security industry and the provision of tailored solutions. As Gabriel Badea, President of the Romanian Security Industry Association, puts it: *"The COVID-19 crisis pushed our industry to deploy more smart technology solutions and cybersecurity has become ever more relevant – classical guarding will be different to what it was before the crisis hit us."* Andre Lilleleht from ETEL in Estonia agrees: *"Following the pandemic, the classical security service will be increasingly integrated with technical solutions."*



Vinz van Es

Board Member, Nederlandse Veiligheidsbranche – NVB (the Netherlands)

Treasurer and Member of the CoESS Board of Directors

"As we see across various industries, implementation and acceptance of digitalisation and automation has increased due to COVID-19. The impact will be that new services will be developed and the work of a private security officer will change towards the future. The security industry has shown itself as a valuable part of society during the COVID-19 crisis, and here lays an opportunity to further build on, whether it be in roles in the public domain or benefiting from more openness to innovations."

Despite the likely economic crisis following the pandemic, it is important to continue investing in security technologies, particularly to enhance the protection of Critical Infrastructure and public spaces.

¹⁴ CoESS and BDSW (2015, April 23): The New Security Company. (<https://coess.org/newsroom.php?page=white-papers>)

Friedrich P. Kötter calls for example on airport operators and the federal police to use the current drop in passenger flows to make investments, which have been necessary for a long time – for example in the deployment of new technologies that allow for a faster passenger screening with less contact between the aviation security agent and passenger: *“All those involved should take advantage of the opportunities now available to improve the quality and efficiency of passenger screening with innovative technical solutions. A good example is the pilot project “EasySecurity” at Cologne/Bonn Airport in Germany¹⁵”*.

Also in maritime security, safety and security challenges will remain high: in times of economic crisis, supply chains remain an important target for organised crime. Challenges posed by illegal migration and piracy in international waters will remain. It is therefore important to continue making investments in detection equipment and the protection of ports and seaways even more so during the current crisis.

Another major evolution resulting from the pandemic will be predictive analysis, with the help of Artificial Intelligence (AI) and big data collected by cameras and surveillance software – for example to predict visitor flows in buildings or public spaces. The deployment of such tools will however not only depend on what is legally allowed to do, but also on properly skilled and licensed personnel that is able to operate such tools – a fact that CoESS has already highlighted in its recent position paper on a European approach for AI¹⁶.

Training, re- and upskilling pathways as well as the availability of a skilled workforce on the labour market will determine whether the private security industry will be able to respond to a market demand for new technologies.

A myriad of challenges

The impact of the pandemic and the many uncertainties it entails on the global economy, social cohesion and security in general, but also the economic situation in the private security industry presents both the industry and public authorities with an important range of challenges:



Cédric Paulin

Secretary General, Groupement des Entreprises de Sécurité - GES (France)

“The main challenge for private security companies is to be able to work, with their employees, as best as possible in a complex health context. It is about getting through this period of crisis by limiting damage and regaining financial leeway as quickly as possible.”

→ **Financial challenges:**

in this paper, we describe the economic consequences of the pandemic on the private security sector. In many business segments, companies rely on short-time working regulations to keep private security officers in their job. In addition, many client sectors are threatened in their very existence or will face a very slow financial recovery – with consequences for private security. This makes for an uncertain future for many companies and their employees.

→ **Risk of future labour shortages:** for many years, the private security sector has been chronically suffering from the lack of skilled labour against an increasing market demand and, while the crisis has temporarily eased these shortages, it is expected that they will become even more critical once the crisis is over. If private security officers now leave the sector due to the crisis in a number of business segments, it will be

¹⁵ An initiative of the Federal German Ministry of the Interior and the Federal Association of the German Aviation Industry (BDL) in close cooperation with local partners (federal police, Cologne/Bonn Airport, Lufthansa Group and security service provider KÖTTER Aviation Security).

¹⁶ CoESS (2020, June 20): Position Paper: White Paper on Artificial Intelligence – A European Approach (<https://coess.org/newsroom.php?page=position-papers>)

hard to respond to the demand for services in a post-crisis era or already before in case new challenges to public health, safety and security materialise. As described earlier, this challenge is particularly relevant in the aviation security sector, where there is a need now for adequate contracting practices that allow to deal with this issue.

- **Training and certification of private security officers:** the pandemic has also added a range of challenges in many countries concerning the training and certification of private security officers. During the lockdown, training and certification have come to a complete stop in many countries or were delayed due to administrative problems. With physical distancing measures in place, administrative and logistical hurdles to train private security personnel remain in many countries. Training and certifying private security forces is however crucial in the face of labour shortages. Furthermore, new skills will be required with new technological solutions and IPC-related services being offered to clients.
- **Threats to public security:** The pandemic has not only laid bare the vulnerability of our Critical Infrastructures. If a severe economic crisis materialises over the upcoming year, this can in addition lead to enhanced levels of organised crime and societal upheaval. Mass demonstrations against SARS-CoV-2 containment measures, which already took place in a number of European countries, are a first sign of a possible polarisation and radicalisation of parts of our societies and examples of how extremists, both left and right, radical environmentalists and criminals may take advantage of demonstrations to loot and destroy. The Europol Terrorism Situation and Trend Report for 2020 further made clear that the protection of public spaces, mass gatherings, and Critical Infrastructure will have to remain a priority¹⁷. In order to properly respond to these challenges and guarantee public security, law enforcement will likely require the support of a sufficient number of skilled private security officers. The risk of a security crisis on top of a health crisis is very real and the damage it could cause on our democracies would be terrible.

→ **Security Continuum:**

The recognition of private security as “essential services” or a “critical occupation” is still not a reality in all EU Member States. In April 2020, more than 30% of CoESS members reported that governments did not respond to the urgent need of recognising private security as an essential service. As a consequence, children of private security officers could in some countries not benefit from prioritised access to day care during the lockdown. Also, the private security sector was in some countries not prioritised for access to personal protection equipment (PPE). Furthermore, private security officers often do not benefit from the same level of legal protection against acts of third-party violence as police officers, although they make a remarkable contribution to the protection of our society. CoESS must therefore state that in some EU Member States, public authorities showed a lack of awareness of the need to better recognise the role of private security in order to tackle the crisis in a Security Continuum.



Mike Reddington

Chief Executive, British Security Industry Association
– BSIA (UK)
Member of the CoESS Board of Directors

“In the very early phase of the pandemic there was very little or no recognition of private security professionals within the UK who we believe provide a critical and essential service. Security did not appear to be in the initial thought process of the UK government on how to ensure business continuity of essential services. It took lobbying by the BSIA and other key industry stakeholders to obtain UK Government clarification and confirmation that security industry operatives, in certain services, classified as critical workers. This does pose the question as to how key elements of governance and law enforcement in the UK view the security industry and the contribution it can make to public safety and security.”

¹⁷ EUROPOL (2020, June 23): European Union Terrorism Situation and Trend Report (TE-SAT) 2020 (<https://www.europol.europa.eu/activities-services/main-reports/european-union-terrorism-situation-and-trend-report-te-sat-2020>)

Ten recommendations towards a safe and sustainable recovery

1

Delivering on the Security Continuum: Recognition and public-private collaboration

Especially in times of crisis, a Security Continuum between public authorities and private security is key to ensure a coordinated, effective response to public health, safety and security challenges.

While the guarantee of public security is the sole competency of law enforcement and public authorities, public forces cannot secure every hospital, Critical Infrastructure or production site. This is especially true in a global crisis, which requires a large workforce on the ground that guarantees the functioning of a variety of infrastructures and the safety of citizens. We have seen the same challenge during the wave of terrorist attacks on public spaces across Europe in the past years.

Under the oversight of law enforcement, private security clearly plays an essential role in managing the crisis and other challenges to public safety and security.

Still, some Member States fell short in providing private security workers and businesses with the special consideration and support they need and deserve – failing on the Security Continuum. Mike Reddington from BSIA summarises: *“Government Ministers and Policymakers need to acknowledge the critical work that security industry professionals provide and the part they play in protecting and maintaining the supply chain of other affected sectors.”*

To truly deliver on the Security Continuum and enable private security companies and workers in providing essential services, public authorities must:

- Engage in a **dialogue with the national Sectoral Social Partners** for the private security industry in order to jointly address most urgent challenges that impact the safe and effective deployment of the 2 million private security officers across Europe. CoESS and its sectoral Social Partner UNI Europa have issued a first list of recommendations in a Joint Declaration¹⁸.
- Guarantee the **free movement** of private security officers in cases of future lockdowns, so they can continue fulfilling their mission – as recommended by the European Commission¹⁹.
- Provide adequate **childcare solutions** for private security officers, who are working during possible future lockdowns or other crisis situations.



Cédric Paulin

Secretary General, Groupement des Entreprises de Sécurité - GES (France)

“Already before the crisis, private security companies and officers have always been on the ground, despite total political and media invisibility. Some steps have been taken to help the private security sector, but the public-private continuum has not been put in place. Importantly, what we have learned from the crisis again is that there is an urgent need to legally recognize the status of security officers, through legal protection in the event of third-party violence.”

¹⁸ CoESS and UNI Europa (2020, April 08): Ensuring business continuity and protection of workers in the COVID-19 pandemic. (<https://coess.org/newsroom.php?page=position-papers>)

¹⁹ Communication from the European Commission: Guidelines concerning the exercise of the free movement of workers during COVID-19 outbreak (2020/C 102 I/03).

- Ensure that there is a **specific regulation in place for Private Security Monitoring Rooms / Control Rooms**, that, in case of contamination, allows for business continuity. These rooms perform an integral public security task and should be part of essential services that have to be ensured during lockdown periods.
- Put in place adequate, legal protection of private security workers against acts of **third-party violence**, in line with the protection of police officers.
- Abide by **good contracting practices** with private security companies. The very businesses and workers that protect the public need financial security themselves.
- When performing tasks in support of law enforcement, provide private security workers with adequate access to **personal protective equipment (PPE)**.
- Consider private security workers for prioritised **access to vaccines** against SARS-CoV-2, when available and on a voluntary basis.

CoESS has elaborated on best practices for the establishment of an efficient Security Continuum in its last White Paper²⁰ and has published multiple statements in this regard since the beginning of the current pandemic²¹.

2

No compromise of security levels, particularly at Critical Infrastructure and public spaces

The pandemic has shown the vulnerability of European Critical Infrastructures against various challenges – lack of personnel, interruption of supply chains, and cyberattacks. At the same time, the economic crisis following the COVID-19 pandemic may incentivise operators to reduce their security budgets. The last thing we need are safety or security issues on top of the challenges we are facing due to the outbreak.

Moreover, lessons need to be learnt to enhance the resilience of European Critical Infrastructures and conclusions must be drawn for the development of national risk prevention and civil protection.

CoESS therefore stresses that, in the short term, the pandemic as well as the implementation and easing of containment measures must at no time, as underlined by the European Commission²², lead to a reduction of the high levels of EU safety and security standards – to the contrary.



Vinz van Es

*Board Member, Nederlandse Veiligheidsbranche – NVB (the Netherlands)
Treasurer and Member of the CoESS Board of Directors*

“Safety and security are essential, even more than before Corona, to keep Critical Infrastructure up and running.”

²⁰ CoESS (2019, October 10): The Security Continuum in the New Normal. (<https://coess.org/newsroom.php?page=white-papers>)

²¹ see www.coess.org

²² Communication from the European Commission: COVID-19: Guidelines on the progressive restoration of transport services and connectivity (C(2020) 3139)



In the mid to long term, it is important to continue to invest in the deployment of new technologies and the protection of public spaces and Critical Infrastructure with a future-proof mindset. With the pandemic, security threats have not suddenly disappeared. As the European Commission correctly states, *“this epidemic which travelled undetected from the other side of the globe has revealed vulnerabilities and potential threats to the security of public places which need to be analysed from an ever broader and cross-cutting perspective”*²³. In its latest Strategic Foresight Report of 2020, the Commission further notes that *“the COVID-19 pandemic has shown the fragility of key infrastructure and the need to protect it against physical and digital threats”*²⁴.

Private security is an important partner of law enforcement in the protection of public spaces and Critical Infrastructures. This makes it even more important to support the sector’s long-term sustainability and make sure that only adequately qualified private security companies are hired to provide protection services, which have proven essential in the ongoing crisis. This can be facilitated, if private security companies that protect European Critical Infrastructure are obliged to comply with the relevant European (CEN/CENELEC) and International (ISO/IEC) Industry Standard(s) – a provision that should be considered by the European Institutions for the foreseen update of Directive 2008/114 on the identification and designation of European Critical Infrastructures²⁵.

3 Implementing best value procurement based on quality criteria

The “essential services” or “critical occupation” status should lead public authorities to rethink how they purchase security services and value a sector whose goal it is to put the health and safety of workers and citizens first. Concrete action is needed at national and EU-level.

Member States, down to local authorities, have to improve public procurement procedures in the private security sector and fight practices that exclusively focus on lower pricing. Such procurement practices incentivise unfair competition, undeclared work, unsafe working conditions and the deployment of an inadequately trained workforce, which can, as a consequence, violate sectoral regulation or collective agreements. Quality-focused procurement on the other hand would benefit companies that wish to enhance their competitiveness on the labour market through better pay, training and working conditions.



Dr Harald Olschok
CEO, Bundesverband der deutschen
Sicherheitswirtschaft - BDSW (Germany)

“The implementation of best value procurement must be consistently pursued, so that high quality service providers can sustain their position on the market; especially concerning the tight budgets of public and private customers as a result of the corona crisis. This is of particular relevance in order to fight unfair competition and to not leave the market to providers that bend the rules and do not fulfil important quality criteria.”

²³ European Commission (2020, April 22): The COVID-19 Pandemic and the Protection of Public Spaces from Terrorist Attacks – Some Considerations (https://ec.europa.eu/newsroom/pps/item-detail.cfm?item_id=674878&newsletter_id=1410&utm_source=pps_newsletter&utm_medium=email&utm_campaign=Protection%20of%20Public%20Spaces&utm_content=The%20COVID-%20Pandemic%20and%20the%20Protection%20of%20Public%20Spaces%20from%20Terrorist%20At&lang=en)

²⁴ European Commission (2020, September 09): 2020 Strategic Foresight Report. Charting the course towards a more resilient Europe (https://ec.europa.eu/info/sites/info/files/strategic_foresight_report_2020_1.pdf).

²⁵ CoESS (2020, January 06): Position Paper – Evaluation of Council Directive 2008/114 on European Critical Infrastructures. (<https://coess.org/newsroom.php?page=position-papers>)

When buying private security services, it is always important to hire qualified staff in qualitative working conditions. Private security officers need adequate training, safe working conditions and appropriate protection, especially when delivering IPC-related services. Companies that offer this service need to undertake the appropriate risk assessment to the health and wellbeing of their employees, their ability to deliver the service and fully consider any potential legal liabilities relating to this.

The European Sectoral Social Partners for private security services, CoESS and UNI Europa, therefore already called in their Joint Declaration²⁶ on public and private buyers of private security services to apply the social and quality procurement criteria and approaches defined in the Best Value Guide, which was jointly developed in the framework of the European Social Dialogue and co-funded by the European Commission. It is available at www.securebestvalue.org.

The EU plays a key role in supporting good procurement practices. CoESS has therefore called for a revision of Directive 2008/114 on the identification and designation of European Critical Infrastructures that ensures the consideration of 60% quality criteria over costs when buying private security services for CIP²⁷.

4 Promotion of good contracting practices

Similar to low-cost focused procurement, bad contracting practices stand in stark contrast to the role that private security plays in our public security frameworks – even more so in times of crisis.

They incentivise working conditions that are not compliant with collective agreements and sectoral regulation, and ultimately compromise health, safety and security for both the client and the security personnel. As Eduardo Cobas, Secretary General of the Spanish Asociación Profesional de Compañías Privadas de Servicios de Seguridad (APROSER) and Chairman of the CoESS Social Dialogue Committee, puts it: *“We need adequate labour provisions that recognise the specificity of labour-*

intensive sectors and actively combat unlawful practices which could increase in an economic crisis scenario”. Competent authorities should therefore urgently address this matter and engage with sectoral social partners to discuss practical, appropriate solutions during the crisis and beyond.



Friedrich P. Kötter

*Vice-President, Bundesverband der deutschen Sicherheitswirtschaft – BDSW (Germany)
CoESS First Vice-Chairman and Chairman of the Aviation Security Committee*

“We must ensure that not all business risks in the event of, for example, a sharp drop in staff capacity utilisation (e.g., due to airline insolvencies) or a significant shift/increase in so-called peaks are borne by the aviation security service provider alone. In addition, the awarding of contracts or future contracts should contain opening clauses for business risks that arise, for example, from changes in the collective agreement and that lead to fair negotiations and thus to possible price adjustments once they occur.”

In the aviation security sector, public procurers as well as private clients such as airports and airlines need to engage with aviation security service providers to agree on rules and procedures that guarantee the sustainability and smooth functioning of the aviation security framework.

²⁶ CoESS and UNI Europa (2020, May 8): Joint Declaration – Ensuring business continuity and protection of workers in the COVID-19 pandemic (<https://coess.org/newsroom.php?page=position-papers>)

²⁷ CoESS (2020, January 06): Position Paper – Evaluation of Council Directive 2008/114 on European Critical Infrastructures. (<https://coess.org/newsroom.php?page=position-papers>)

CoESS has joined forces with other business services within the European Business Services Alliances (EBSA) to call on the European Commission to urgently provide guidance to Member States on how to ensure good contracting practices during and after the COVID-19 crisis. This is key to ensure a safe and secure recovery and to actively sustain employment in affected sectors²⁸.

5

Financial aid and support

Aid and support must be quickly available to otherwise viable businesses with low administrative burden, and competent authorities must engage with sectoral social partners to find quick, sector-specific, solutions.

CoESS therefore highly welcomes the European Union's and Member States' historic efforts to provide financial support to workers and businesses suffering from the COVID-19 pandemic. European Commission President Ursula von der Leyen rightly said in her State of the Union speech in September 2020: *"This is definitely not the time to withdraw support"*²⁹.



Eduardo Cobas Urcelay

Secretary General, Asociación Profesional de Compañías Privadas de Servicios de Seguridad - APROSER (Spain)
Chairman, CoESS Social Dialogue Committee

"Efficient and intensive investments and public aids in the most affected sectors and services provided by private security in those specific areas is key for the sustainability of the private security industry"

In France, the Groupement des Entreprises de Sécurité (GES) has very clear demands, as Secretary General Cédric Paulin explains: *"The creation of a financial guarantee to ensure the sustainability and soundness of private security companies; the limitation of subcontracting; and the creation of an index of the cost of private security"*.

Further, it is important to note that private security is part of the value chain of many other sectors like transport, tourism and live performances, which have been particularly hit by the crisis. Sector-specific financial support will be necessary for those industries that have been put to a halt and will not be able to restart without additional safety measures performed by private security, also to retain workers and ensure the sustainability of businesses now³⁰. Everything must be done to protect most affected sectors such as tourism and trade. Particularly in transport and tourism, a sectoral crisis may send shockwaves across entire economies, so it is important that the pandemic's economic impact is absorbed while abiding by high safety and security standards.

Friedrich P. Kötter adds that in aviation, *"it is already clear that certain regional airports in particular will not be able to survive on their own and will be dependent on state aid"*.

²⁸ European Business Services Alliance (2020, May 13): The European Business Services Alliance supports good contracting practices in the COVID-19 crisis (<https://coess.org/newsroom.php?page=position-papers>)

²⁹ State of the Union Address by President von der Leyen at the European Parliament Plenary (2020, September 16) (https://ec.europa.eu/commission/presscorner/detail/en/SPEECH_20_1655)

³⁰ see also CoESS (2020, May 19): Position Paper – European Commission Communication "Tourism and Transport in 2020 and beyond" (<https://coess.org/newsroom.php?page=position-papers>)

6

Extension of short-time work frameworks

Short-time work frameworks, supported by state aid programmes, have been of great help for companies all over Europe to retain personnel during the crisis so far and must be continued.

While this has been the case for many industries, the relevance of a potential future labour shortage in the private security sector shows that private security is not just any kind of service. If the sector is not able to retain personnel in this crisis, entire ecosystems such as aviation transport will face a severe issue to ensure operability once the passenger flow increases again.

It is therefore important that EU Member States continue to financially support short-time work benefit frameworks in strategic sectors in order to ensure their mid- and long-term sustainability. CoESS warmly congratulates the European Commission in this regard for the new European instrument for temporary Support to mitigate Unemployment Risks in an Emergency (SURE).

7

Act on the “War on Cash”

Policymakers at national and EU-level must take immediate action to ensure the continued availability of cash to everyone and enforce the legal tender status of cash, making it illegal to anyone to refuse payment in cash. The European Sectoral Social Partners for private security services, CoESS and UNI Europa, have already made a respective joint statement prior to the COVID-19 pandemic in November 2019³¹. For the COVID-19 situation, this means also countering accusations concerning health risks related to the use of cash with scientific evidence.

As Eduardo Cobas from APROSER puts it: *“COVID-19 should not be used as an artificial instrument of a not justified war against cash, that remains an essential payment system for relevant segments of the society”.*



Thierry Lebeaux
 Secretary General, European Security Transport Association (ESTA)
 Member of the CoESS Board of Directors

“Cash is a volume-based activity. Unless a critical mass of cash is in circulation, the cash cycle will not be sustainable. However, cash is not only a question of payments. It fulfils important macro-economic and social functions. It is key to the stability of the financial system and the financial inclusion of all citizens.”

In the light of the ongoing pandemic, the European Central Bank is conducting a study through a number of European laboratories to assess the reality behind accusations that the use of cash represents a health risk. The final results are not yet available at the time this White Paper is written. However, some initial conclusions confirm that cotton-based material of which banknotes are made is much less favourable for longer survival of the virus and contamination than, for example, the plastic of which payment cards are made. As contactless payment does not mean contactless shopping, it offers strictly no additional protection.

³¹ CoESS and UNI Europa (2019, November 05): Joint Statement on the Need to Safeguard Cash. (<https://coess.org/newsroom.php?page=position-papers>)

Contactless also means less security. Researchers in Switzerland have shown that the contactless facility of some cards could be used to withdraw or pay any amount above the limit without the need to enter the PIN.

Cash usage overall has substantially declined. Payment habits adopted during the crisis will have lasting effects. Possibly the most significant impact of the crisis is the reduction, in many retail shops, of the minimum limit to use a card, i.e. where cash is used naturally by everyone.

In the light of the COVID-19 experience, the following measures need to be considered:

1. Prevent any company from making spurious allegations to exploit the fear of contamination in order to improve their market position.
2. Consumer protection policies should make it mandatory for retail, when they display information on card acceptance at their point of sale, to also include, in the same format, information on the ability to pay in cash.
3. This requires a thorough consideration of the definition and meaning of Legal Tender. It is often argued that the decision to accept cash for payment is part of the contractual freedom between a retailer and its customers. However, cash is not just like any other means of payment, as it is public money, backed by central banks, whereas e-money is private money. Legal tender must mean that it is illegal to refuse cash as payment with only specific exceptions. It is good news that the Commission intends to call on a group of Experts from Member States to review the definition of legal tender.
4. In the process of transition from international card schemes to a European card infrastructure, the European Payment Initiative, launched by a number of financial institutions in the EU, cash can play its role by facilitating the transition whereby consumers reduce the use of their International payments and use cash instead, until the new scheme is operational.

8

Solutions for training, up- and reskilling

In addition to the retention of personnel, initial training of private security officers as well as up- and reskilling is crucial in order to ensure business continuity at private security companies.

The months-long lockdowns and following public health measures have severely interrupted training and licensing procedures in many EU Member States, which presents a crucial challenge for private security companies to respond to new market demand by training new or re-skilling existing officers.



Mike Reddington

*Chief Executive, British Security Industry Association
– BSIA (UK)*

Member of the CoESS Board of Directors

"To aid recovery, Government Ministers and Policymakers should ensure that the professional security industry continues on its path towards greater professionalism through approved, recognised and financially supported apprenticeship schemes and programmes of employee continuous development, which will ensure a more stable and invested workforce."

Also, private security officers need additional training to be able to fulfil IPC-related services. As Dr Harald Olschok from BDSW, puts it: *“As a result of the pandemic, the industry has taken over new tasks - for example the implementation of access control, health and safety measures and social distancing rules in hospitals, supermarkets - and attracted new customers. We have to make sure that there are suitably qualified security workers for these activities, but also for new activities related to the use of new security technologies.”*

Tonći Prodan from the Croatian Security Association adds that, in maritime transport security, as in other service segments, private security officers *“will have to learn more about anti-epidemiological measures, and all port staff will have to learn to live with the new virus. It is quite certain that the maritime industry as a whole will be monitored for anti-epidemiological measures for years to come, which is why the constant education and professional development of its maritime staff and security officers is very important”*.

It is therefore important that competent authorities engage with sectoral Social Partners for private security to find pragmatic solutions for the training and certification of security officers to properly manage the ongoing pandemic and to make the training systems fit for the future. It would also be useful to address what part of the training can be done online, so as to cope with future lockdowns.

The European Commission correctly states that *“Strategic foresight is also relevant for shaping the occupations of the future, identifying new skills necessary for the green and digital economy, learning patterns and partnerships, and understanding the related interplay between new technologies, jobs, education, and key stakeholders”*³². Already prior to the pandemic, CoESS and its European Sectoral Social Partner UNI Europa provided recommendations on how to tackle labour shortages and skills mismatches³³.

9

Keep private security regulation adapted to new realities

We need flexible administration and regulatory systems at national level that are capable to adapt to new realities in the private security sector, while preserving the basic principles already introduced by sectoral regulations.

Conclusions must now be drawn as to how the potential of the private security sector could be used even more specifically to support future crisis management. *“Creating more specific laws for the sector and spreading a security and safety culture could be a great start”*, says Alberto Ziliani, Board Member of Federsicurezza in Italy.



Riho Lutter

Eesti Turvaettevõtete Liit – ETEL (Estonia)
Chairman, CoESS Cohesion Committee

“In some countries in Central and Eastern Europe, the legal framework proved to be out of date. The pandemic has revealed deficiencies in legislation. In Estonia for instance, a planned update of the Security Act is delayed due to the pandemic. In Slovenia, companies had considerable difficulty in purchasing protective equipment for the most exposed security personnel at the time. Also, there were some problems to the restriction of movement and the interpretation of sectoral regulations. In some countries, public support to the private security industry in crisis response and recovery measures was non-existent”.

³² European Commission (2020, September 09): 2020 Strategic Foresight Report. Charting the course towards a more resilient Europe (https://ec.europa.eu/info/sites/info/files/strategic_foresight_report_2020_1.pdf)

³³ CoESS and UNI Europa (2020, January 30): Joint Statement on the Skills Agenda for Europe (<https://coess.org/newsroom.php?page=position-papers>)

In some EU Member States, the legal framework already allows for the police to use private security staff in case of emergencies. In the current situation, this may be an avenue to explore in other countries, provided the selection and training requirements for security agents is appropriate, their personal protection is guaranteed, and under due consideration of existing, sector-specific regulation in EU Member States.

Currently, in certain countries, it is still often the case that private security companies are asked to perform tasks, which are not covered by national legislation. We now need clear rules, as also stated by the European Commission³⁴, on the rights and duties of service providers – for example if they are responsible for refusing access to premises following the breach of IPC measures or a temperature detection³⁵. These measures must be developed in cooperation with authorities, with a clear definition of the obligations of each actor, if they do not exist yet. Also, basic training curricula for private security officers may have to be updated with IPC-related qualifications in some countries.

The private security industry has always been pushing for sector-specific regulation that is adapted to today's reality. For example, CoESS' German member BDSW has been calling for a reform of sectoral law for years – with success, as Dr Harald Olschok reports: *"Since 01 July 2020, the Federal Ministry of the Interior has been put in charge of regulating the industry, a very important first step for the German security industry. Before, the Ministry of Economics was responsible. Now a specific law for the security services industry should be drawn up before the next federal election in order to further increase the quality of services and make the industry more attractive as an employer"*.

10

Coordination at EU-level

Coordination of the response to the pandemic at EU-level has at times been lagging behind the development of the crisis, but has nevertheless proven to be essential.

Financially, some Member States may be more constrained to absorb the impact of the crisis, which is why it is important that the EU continues to complement national measures. European solidarity is key to overcoming the consequences of this pandemic and CoESS takes notice of the historic efforts undertaken across the EU Institutions for the Union to emerge from the crisis more united and resilient than before.

In addition, EU-level coordination is key for the guarantee of free movement, recovery of cross-border transport and travel as well as guidelines for the lifting of containment measures. CoESS has taken notice of many valuable European Commission Guidelines and Council Recommendations targeting business continuity and recovery of these sectors, and hopes that Member States will contribute to a coordinated management of the crisis as recently requested by European Parliament³⁶.

CoESS stands ready to contribute to EU-level coordination by participating in multiple EU Expert Groups and European Sectoral Social Dialogue, and we welcome a strengthened engagement of the European Institutions with the private security sector to foster a resilient Union, which is prepared for the numerous opportunities and challenges ahead.

³⁴ Communication from the European Commission: COVID-19: Guidelines on the progressive restoration of transport services and connectivity (C(2020) 3139)

³⁵ There needs to be a clear and defined course of action that will be taken, if an individual has a high temperature detected: who will intervene, what action will they take, are they qualified to make this decision, and do they have the appropriate personal protective equipment to take this course of action. (https://edps.europa.eu/sites/edp/files/publication/01-09-20_edps_orientations_on_body_temperature_checks_in_the_context_of_euis_en.pdf).

³⁶ European Parliament Committee on Tourism and Transport (2020, September 10): About the tourism sector in those difficult times. (https://www.europarl.europa.eu/cmsdata/211329/STAMPED_2020%2009%2009%20TRAN%20Secretariat%20and%20Tourism%20Task%20Force%20to%20German%20Ministry%20of%20Economic%20Affairs%20and%20Energy%20.pdf).

About CoESS

The **Confederation of European Security Services (CoESS)** acts as the voice of the private security industry, covering **17 European Union (EU) Member States** and a total of **23 countries across Europe**, representing around **2 million licensed guards** and **45,000 companies**, and generating a **turnover of €40M+**. CoESS is a member of BusinessEurope and the European Business Services Alliance (EBSA).

As per the most recent Representativeness Study, CoESS is the only European employers' organisation representative of the private security services. Since 1992, the European Services Workers Union, UNI Europa, and CoESS are actively involved in the European Sectoral Social Dialogue for the private security services.

The private security services provide a wide range of services, both for private and public clients, ranging from European Union institutions buildings to nuclear plants, airports, Critical Infrastructure facilities, inter-modal transport hubs, public transport stations and areas, and national governmental agencies and institutions (such as asylum seekers centres, public hospitals, universities, etc.).

As defined in CEN EN 15602 standard on "Security Services Providers – Terminology", "private security company" is one that provides private security services.

Following the definition in the standard, services provided by security companies are aimed at the protection of people, property and assets. These may include the following services (non-exhaustive list):

- Manned guarding – access/exit control, airport security checks, armed security officer/guard, port security checks, reception security, site security, static guarding, store detective.
- Mobile patrolling and mobile site/area patrolling.
- Alarm response – alarms, monitoring and alarm receiving centre, alarm receiving and monitoring centre operator, alarm response, alarm response officer.
- Key holding – key holding and key storage.
- Event security – crowd controller, crowd control supervisor, crowd control management.
- Door security and supervisor.
- Close protection/body guarding.
- Public order services – city patrolling, transport security.

It excludes military services.



www.coess.org

Photo credits:

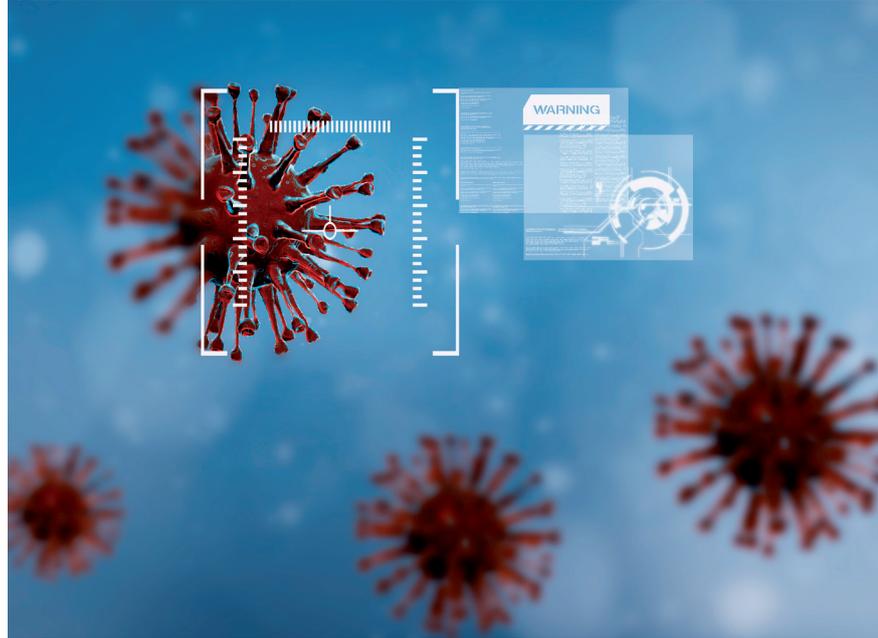
© Depositphotos: AndreyPopov, © iStock: ALLVISIONN, © Depositphotos: Vik_Y, © Shutterstock: Travel mania,

© iStock: AndreyPopov, © Shutterstock: Rrainbow, © Shutterstock: pixino0, © Shutterstock: Dmitry Kalinovsky



Acting as the voice of the **security industry**

Confederation of European Security Services



coess.org

Confederation of European Security Services

Jan Bogemansstraat | rue Jan Bogemans 249
B-1780 Wemmel
Belgium

Publisher

Catherine Piana | Director General
catherine@coess.eu | T +32 472 18 01 07