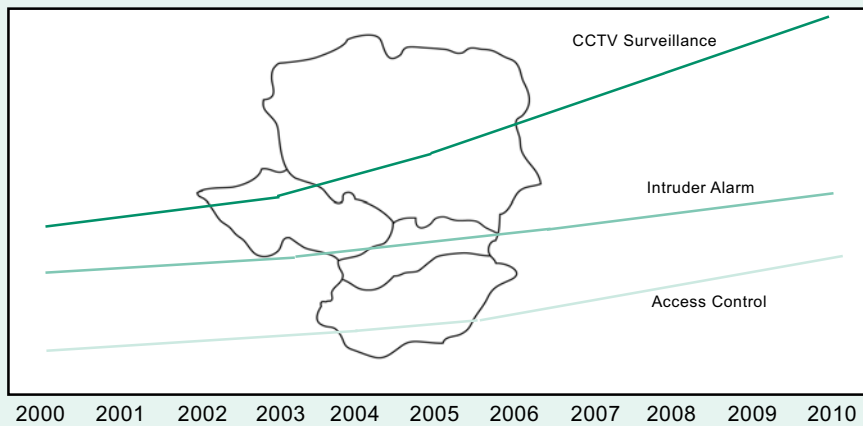


EVALUATING THE MARKETS IN:

EU-CE(4) - Demand for IBC(s)



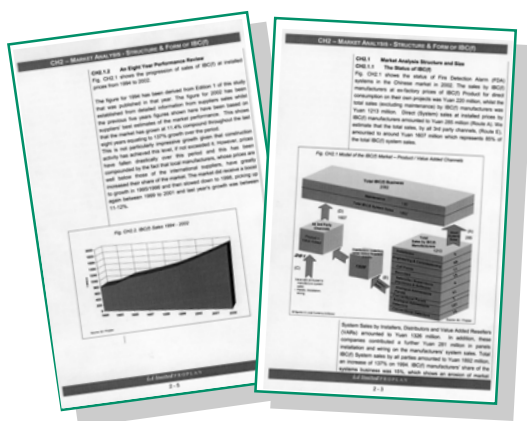
- CZECH REPUBLIC
- HUNGARY
- POLAND
- SLOVAKIA

INTRODUCTION

This study is part of a series of multi-client reports on the world's market for intelligent controls in non-domestic buildings. Support from all the major manufacturers and suppliers over the last 25 years has enabled us to develop a series of robust models that when populated with validated data can determine the performance and value of both the supply and demand side. It has allowed us to size, compare and trend numerous market segmentations, establish supplier performance in both product and systems business and establish the importance and effect of all the demand drivers. "Security Systems - IBC(s)¹ - The Central European Market 2005 to 2010" is the most detailed and accurate report published on this subject for this region. This 970 page report benefits from comparisons with similar studies carried out in different regions of the world and related technical infrastructures in buildings. Split into three studies, it separately assesses the markets for Access Control - IBC(a)², CCTV - IBC(c)³ and Intruder Alarms - IBC(i)⁴. Each study is split into two volumes; volume I comprising the executive summary which compares findings across all countries; and volume II providing the detailed analysis using the same format for each EU-CE(4)⁵ countries. Data on the past, present and future market for IBC(s)¹, is clearly presented quantitatively and qualitatively, so that strategies can be developed to fully exploit opportunities on a pan-regional basis.

APPRECIATION

This is an exciting time for all those involved in the EU-CE(4) electronic security industry for this is a relatively immature business that is about to undergo some rapid evolutionary, if not revolutionary change. It has size, some €218 million at installed prices and the potential to increase by half as much again within the next five years. But the supply side is fragmented and needs restructuring so that more companies can achieve the necessary minimum economic size to invest in IP Systems and Digital Technology and realise this latent potential. However organic growth may well play a more important role in achieving rapid growth in this market during the next few years than growth through acquisition because there are relatively few big suppliers available to acquire. There are wide variations between the size and growth of the three components making up this business, access control, cctv surveillance and across the four countries. This is a very robust market with 50% of all sales in the two largest markets of Poland and the Czech Republic going to refurbishment, and replacement business. The main demand drivers at this time are growth and stability in the economy and construction industry, whilst concern over crime and terrorism and the political willingness to address these issues has been secondary during the last five years. All the world's major manufacturer suppliers of security products are well established across most of the four countries but none dominate the product market, whilst they have made less impression still on the systems business. Continued growth is assured for many years to come because the present levels of penetration are less than one third of the average in western Europe but this will not reduce the intensity of competition.



¹IBC(s): Intelligent Building Controls - Electronic devices & systems for building Access Control, CCTV and Intruder Alarms.

²IBC(a): Electronic devices and systems to control and monitor people through secured access points such as doors.

³IBC(c): Closed Circuit Television (CCTV) / video for security applications in buildings, public places and traffic management.

⁴IBC(i): Electronic sensors and systems that can detect intruders entering premises and sites and signal alarms.

⁵EU-CE(4): The countries of Czech Republic / Hungary / Poland / Slovakia.

This study is now available online through our OBIS SERVICE. For more details see

www.iandi.ltd.uk

or contact allan.mchale@iandi.ltd.uk
and jeremy.towler@iandi.ltd.uk

Intelligent Controls in Buildings



REVIEW

Comprising some 970 pages and 250 charts and tables this report identifies and analyses:-

- The sales by Product (factory gate prices) and Systems (installed) for direct and indirect channels, to 2005, with forecast to 2010
- The level of penetration of system sales in each country and how this compares with western Europe
- The market size by type of project, new construction, refurbishment and retrofit
- The market size by contract value (4 segments)
- The market size by single, multiple & multi-site projects
- The market size by type of hardware (8 products)
- The market size by type/end use of building (16 categories), + Public surveillance for IBC(c)
- Geographic distribution of sales within each country
- The distribution channels and the volume of business that they handle, comparing "product" and "total solution sales"
- Market share bands for all established suppliers by IBC(a), IBC(c), and IBC(i) product and by total system sales
- Profiles of established suppliers provided in a standard format allowing comparisons to be made
- Analysis of the major forces that determine demand and their future impact
- Establishes the part played by all third party suppliers and the impact that they will have in the future
- A detailed analysis of the channels of distribution and emerging trends
- Assesses the IBC(s) suppliers' influence on Total Building Solutions and measures the incidence of integrated services by both functionality and the vertical building markets that they are installed in

For prices and to purchase this study please see the order form that accompanies this synopsis

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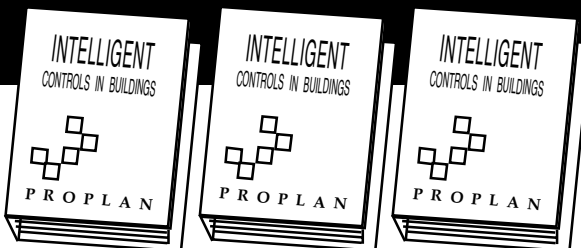
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INTELLIGENT CONTROLS IN BUILDINGS

THE CENTRAL EUROPEAN MARKET 2005-2010

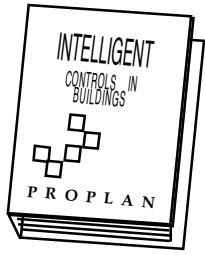
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THE CENTRAL EUROPEAN MARKET 2005-2010



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