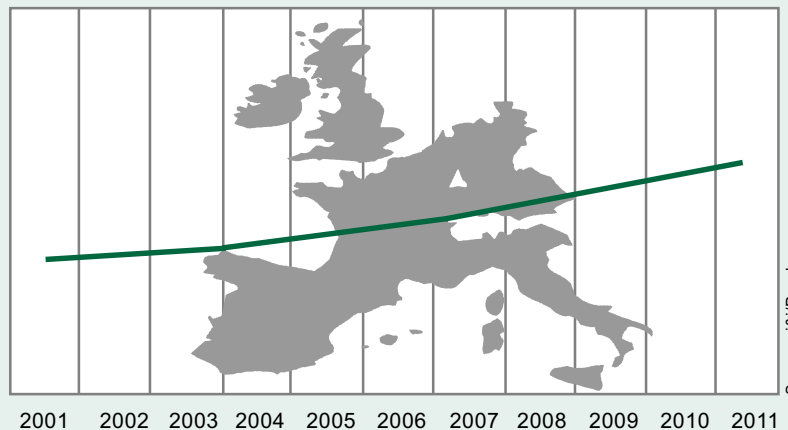




FOR THE MARKETS OF:

- BELGIUM
- FRANCE
- GERMANY
- ITALY
- NETHERLANDS
- SPAIN
- UNITED KINGDOM

EU(7) Demand for Access Control Systems



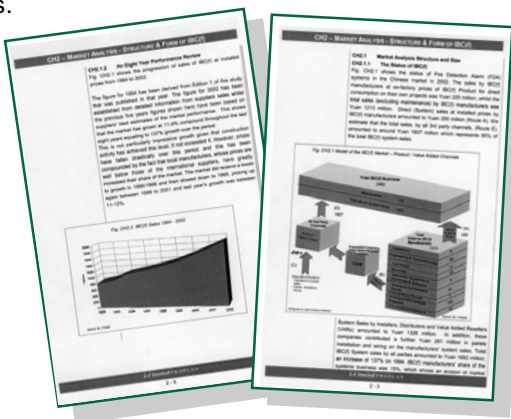
Source: I&I/Proplan

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 establish the performance and value of both the supply and demand side. This is now built into our relational database called OBIS. 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 EU(7) Market 2006 to 2011" is the most detailed and accurate report published on this subject for this region. This 1600 page report benefits from comparisons with Edition 1 (2002), 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(7)⁵ country. 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

Sales of access control systems and products in the EU(7) in 2006 were €1.532 billion and €0.780 billion respectively. Growth in both system and product sales averaged 6% per annum over the last five years, a 33% growth over the last five years. These growth rates can be double in some countries in the more attractive vertical markets of banking & finance, communication and computer and high-tech buildings. The main drivers for growth were the increased output in new construction in a number of countries, higher levels of refurbishment/retrofit business and increased fear of crime and terrorism. There has been a strong trend towards more sophisticated and integrated systems and convergence with IT networks and the business enterprise which has generated more value added services. The UK is by far the largest market and accounted for 31% of product sales in 2006. It is the most developed of all the markets, having a penetration of sales per capita which is nearly double the EU(7) average. The fastest growth has been achieved in Spain and Italy, where the markets grew at some 10-11% per annum over the last 5 years. We forecast that in 2007 aggregate growth of IBC(a) sales in the EU(7) will be 6.3% and that compound growth will be 5.7% up to 2011. In the UK, which is considered to be the most competitive market, margin on sales has remained stable over the last 10 years but even more surprising is the fact that despite major consolidation, the supply side remains fragmented, with no one company getting more than 10% of the products business. The winners in this market will be those that are fully committed to IT-Convergence, working with the IT departments, delivering interoperable solutions that meet the clients value proposition of performance and value.



Intelligent Controls in Buildings

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.

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⁵EU(7): Belgium / France / Germany / Italy / Netherlands / Spain / United Kingdom.

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SECURITY SYSTEMS - ACCESS CONTROL

THE EUROPEAN (7) MARKET 2006-2011

REVIEW

Comprising some 625 pages and 244 charts and tables this report identifies and analyses:-

- The sales by Product (factory gate prices) and Systems (installed) for direct and indirect channels, to 2006, with forecast to 2011
- The level of penetration of system sales in each country in western Europe
- The market size by type of project; new construction, refurbishment, retrofit and extension
- The market size by contract value (4 segments)
- The market size by type of hardware (8 products)
- The market size by type/end use of building (16 categories)
- 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 product and by total system sales
- Profiles of established suppliers provided in a standard format allowing comparisons to be made
- The major forces that determine demand and their future impact
- The part played by all third party suppliers and the impact that they will have in the future
- The channels of distribution and emerging trends
- The supply and demand side influences on Total Building Solutions
- Measures the incidence of integration by both functionality and the vertical building markets in which they are installed
- The most attractive business areas defined by building type
- Price pressures, and the effect on margin on sales over the last 10 years

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

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9	FORCES THAT DETERMINE DEMAND	(12 pages)
10	CONVERGENCE OF IT & INTELLIGENT INFRASTRUCTURES IN BUILDINGS	(21 pages)
11	TECHNOLOGY STANDARDS & REGULATIONS	(44 pages)

GENERAL APPENDIX / GLOSSARY

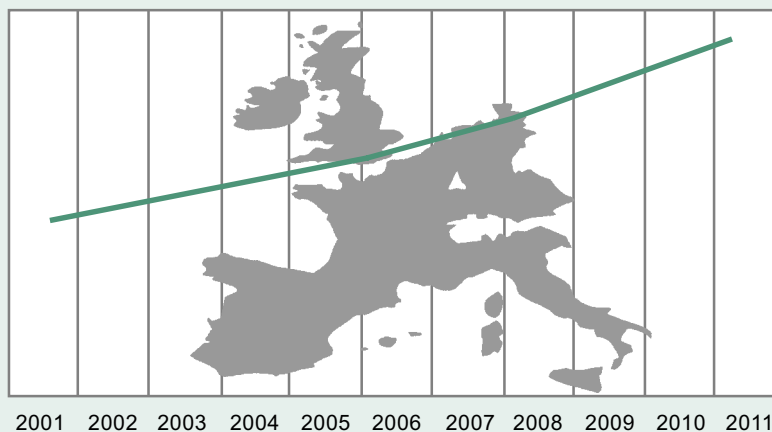




FOR THE MARKETS OF:

- BELGIUM
- FRANCE
- GERMANY
- ITALY
- NETHERLANDS
- SPAIN
- UNITED KINGDOM

EU(7) Demand for CCTV / Video Surveillance Systems



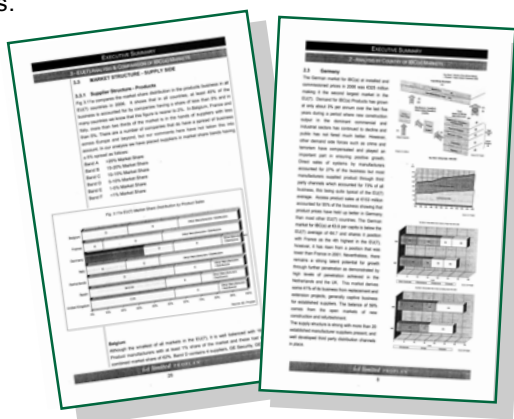
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APPRECIATION

Sales of CCTV / Video systems and products in the EU(7) in 2006 were €2.17 billion and €1.07 billion respectively. Growth in product sales averaged 8.0% per annum over the last five years, a 47% growth over the five years, whilst system sales averaged 6.9%. These growth rates can be double in some countries in the more attractive vertical markets of retail, communication and computer and high-tech buildings. The main drivers for growth were the increased output in new construction in a number of countries, higher levels of refurbishment/retrofit business and increased fear of crime and terrorism. There has been a strong trend towards more sophisticated and integrated systems and convergence with IT networks and the business enterprise which has generated more value added services. Companies that have adopted this strategy are winning higher margin business, particularly those that are fully committed to IT-Convergence, working with the IT departments to deliver interoperable solutions that meet the clients' value proposition of performance and value. The UK is by far the largest market, accounting for 38% of product sales in 2006. It is the most developed of all the markets, having a penetration of sales per capita which is nearly double the EU(7) average. The fastest growth has been achieved in Spain, where the market grew at some 19% per annum over the last 5 years. We forecast that in 2007 aggregate growth of IBC(c) sales in the EU(7) will be 7.8% and that compound growth will be 7.6% up to 2011. Growth in demand is based on a forecast increase in construction output, a higher spend on more sophisticated systems and increased demand because of the perceived threat of crime and terrorism. Despite major consolidation, the supply side remains fragmented with no one company getting more than 10% of the products business.



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Intelligent Controls in Buildings



REVIEW

Comprising some 624 pages and 244 charts and tables this report identifies and analyses:-

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- The level of penetration of system sales in each country in western Europe
- The market size by type of project; new construction, refurbishment, retrofit and extension
- The market size by contract value (4 segments)
- The market size by type of hardware (10 products)
- The market size by type/end use of building (16 categories) and Public surveillance
- 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 product and by total system sales
- Profiles of established suppliers provided in a standard format allowing comparisons to be made
- The major forces that determine demand and their future impact
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GENERAL APPENDIX / GLOSSARY

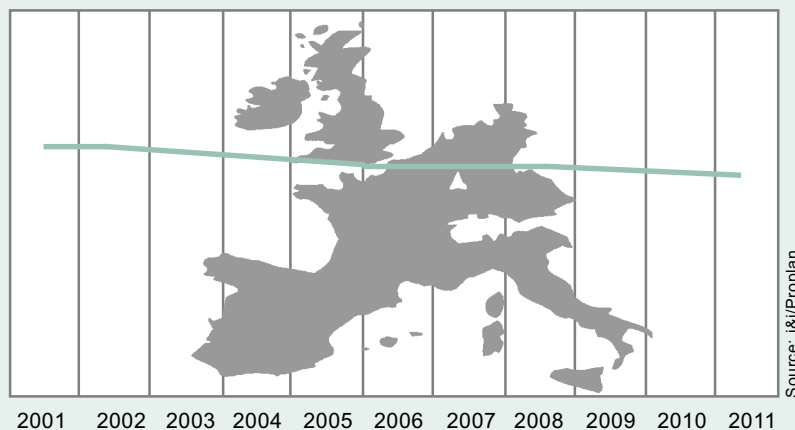


SECURITY SYSTEMS - INTRUDER ALARMS THE EUROPEAN (7) MARKET 2006-2011

FOR THE MARKETS OF:

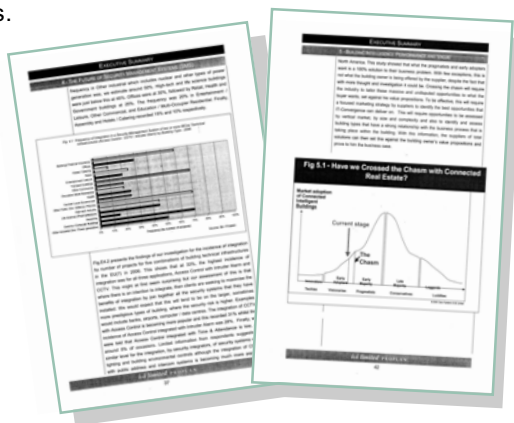
- BELGIUM
- FRANCE
- GERMANY
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EU(7) Demand for Intruder Alarm Systems



INTRODUCTION

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APPRECIATION

Sales of intruder alarm systems and products in the EU(7) in 2006 were €2.073 billion and €0.963 billion respectively. There is a mixed picture across the EU(7) with some growth in selected countries and contraction in others, but overall product sales declined by 0.3% per annum and system sales by 1.7% over the last five years. This is fast becoming a mature market which is losing some share to CCTV / video, whilst at the same time becoming more dependent on construction activity and general economic conditions. The former is forecast to become more favourable during the next few years and we forecast in 2007 product sales will grow by a little less than 1% and a compound growth of 0.4% up to 2011. These growth rates can be double in some countries and in the more attractive vertical markets of banking and finance, education, retail and residential multi-family dwellings. Future growth will be driven by increased output in new construction in a number of countries, higher levels of refurbishment/retrofit business and increased fear of crime and terrorism. There has been a strong trend towards more sophisticated and integrated systems, particularly combined with CCTV / video. However, convergence with IT networks and the business enterprise is not a strong feature of this market and latent growth opportunities have failed to generate additional business. The UK is by far the largest market and accounted for 27% of product sales in 2006. It is the most developed of all the markets, having a penetration of sales per capita more than 50% higher than the EU(7) average. The fastest growth has been achieved in Spain, where the market grew at some 7% per annum over the last 5 years. Despite major consolidation during the last five years, the supply side remains fragmented but far less than in the CCTV and Access control businesses. The winners in this market will be those that can deliver integrated solutions, firstly with other physical security solutions and then IT-Convergence focussed on the higher growth opportunities to be found in some vertical markets.

Intelligent Controls in Buildings

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SECURITY SYSTEMS - INTRUDER ALARMS

THE EUROPEAN (7) MARKET 2006-2011

REVIEW

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- The channels of distribution and emerging trends
- The supply and demand side influences on Total Building Solutions
- Measures the incidence of integration by both functionality and the vertical building markets in which they are installed
- The most attractive business areas defined by building type
- Despite prices pressures, the average margin on sales has remained quite stable over the last 10 years

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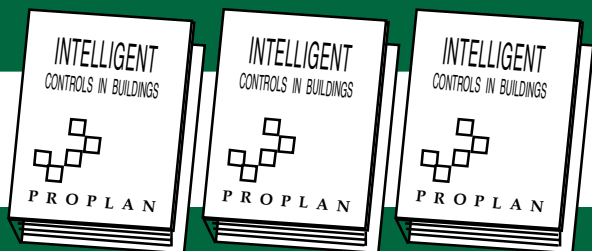
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SECURITY SYSTEMS THE EUROPEAN (7) MARKET 2006-2011



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Security Systems

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Complete report, Security Systems - The European (7) Market 2006-2011 , comprising the 3 individual studies: Access Control , CCTV and Intruder Alarm , together with a separate Executive Summary for each	£9,995		£400		£700		
Complete Access Control study together with its own European (7) Executive Summary	£3,700		£300		£350		
Complete CCTV study together with its own European (7) Executive Summary	£3,700		£300		£350		
Complete Intruder Alarm study together with its own European (7) Executive Summary	£3,700		£300		£350		
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