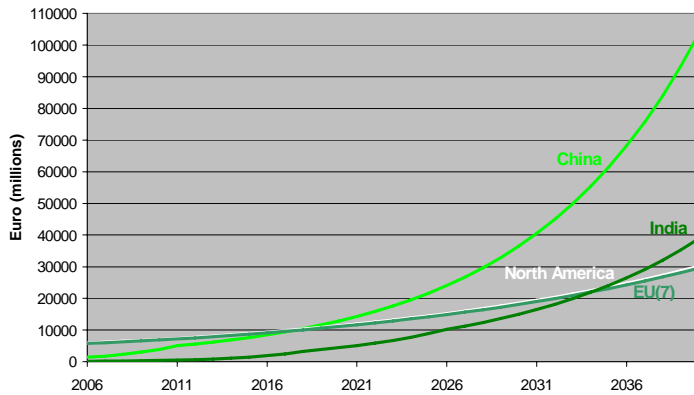


## EVALUATING THE MARKETS IN INDIA

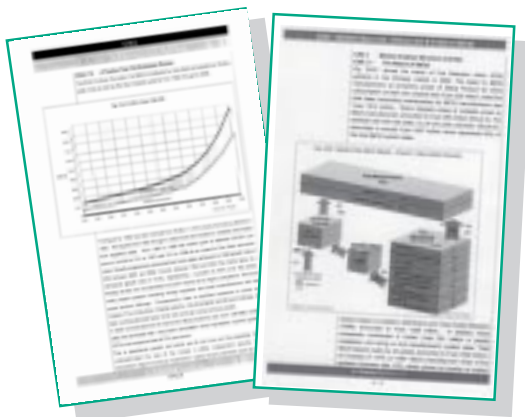
India / China / North America / EU(7) Electronic Security System Sales Forecast



\*EU(7) comprises Belgium, France, Germany, Italy, Netherlands, Spain, United Kingdom. Source: i&i limited/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 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)<sup>1</sup> - The India Market 2007 to 2012" is the most detailed and accurate report published on this subject for this region. This 325 page report benefits from comparisons with similar studies carried out in different regions of the world and related technical infrastructures in buildings. The report separately assesses the markets for Access Control - IBC(a)<sup>2</sup> and CCTV / Video Surveillance - IBC(c)<sup>3</sup>, plus a short review of the fledgling market for Intruder Alarms - IBC(i)<sup>4</sup>. Split into two volumes, volume I comprises the executive summary which summarises the findings and compares India with other regions of the world, whilst volume II provides the detailed quantitative and qualitative analysis, historical development and future forecast, so that strategies can be developed to fully exploit opportunities.



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

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

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

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

### APPRECIATION

This study shows that the Indian market for Electronic Security Systems has been growing at 30% per annum over the last two years and is set to overtake the North American and western European markets by about 2034.

The study focuses on the part played by manufacturers and Installers of Access Control, CCTV and Intruder Alarm systems and the wider picture of building services controls. It provides a detailed quantitative and qualitative assessment of the current and future markets for security systems in non-residential buildings in India.

This study shows that the total Indian IBC(s) systems market in 2007 was worth INR10,132 million and was comprised predominantly of sales of Access Control and CCTV / Video Surveillance Systems. It also identifies why there is currently only a fledgling market for Intruder Alarm Systems and forecast how each of these businesses will develop in the future.

Penetration of IBC(s) sales in India falls well behind the western world and is also significantly less than China. But this is set to change, for India faces numerous security concerns on both an international and domestic level. The threat of terrorism is undoubtedly amongst the highest in the Asia-Pacific region and metropolitan areas are facing a serious and growing problem of crime. Based on these factors and others that we identify, India is rapidly racing to become the 2nd largest market in the world behind China for electronic security systems.

In 2007 the vast majority of security equipment was imported into India from numerous international IBC(s) manufacturers. Security equipment is manufactured locally and it is surprising that it does not account for more, considering that import tax can be as high as 35%. The unstructured market in India does import quantities of product, such as low-end cameras and readers for access control/time & attendance, predominantly from Asia. As with the other building technical infrastructure markets we have researched in India, demand has not reduced competitive pressures, but compared with other markets, where local manufacturers play a more important role, there is more opportunity to sell on quality.

The strong preference of most buyers in India is still to install conventional, unsophisticated systems and so the supply side has still got a serious job to do in proving the business case to install more sophisticated systems that will provide improved security. Despite these challenges, this study shows that the Indian market for electronic security systems provides unprecedented opportunities for growth.

This study is now available online through our OBIS SERVICE. For more details see [www.iandi.ltd.uk](http://www.iandi.ltd.uk) or contact [allan.mchale@iandi.ltd.uk](mailto:allan.mchale@iandi.ltd.uk) and [jeremy.towler@iandi.ltd.uk](mailto:jeremy.towler@iandi.ltd.uk)

# SECURITY SYSTEMS THE INDIA MARKET 2007-2012

## REVIEW

Comprising some 325 pages and more than 90 charts and tables this report identifies and analyses separately for Access Control and CCTV / Video Surveillance:-

- The sales by Product (factory gate prices) and Systems (installed) for direct and indirect channels, to 2007, with forecast to 2012
- The level of penetration of system sales and how this compares with other developing and developed markets
- The market size by new construction, refurbishment, retrofit, extension
- The market size by commercial, public, industrial
- The market size by 4 different contract values
- The market size by 7 types of IBC(a) hardware and 8 types of IBC(c) hardware
- The market size by 16 building types/end uses + Public surveillance for IBC(c)
- The size, segmentation, growth and suppliers to the separate business of Integrated Building Management Systems (IBMS)
- The geographic distribution of sales
- 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) and IBC(c) product and by total system sales
- Profiles of established suppliers provided in a standard format allowing comparisons to be made
- 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 IBC(s) suppliers' influence on Total Building Solutions and the incidence of integrated services by both functionality and the vertical building markets in which they are installed
- The impact of Technology and IT-Convergence on the IBC(s) business

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

## CONTENTS

### VOLUME I - EXECUTIVE SUMMARIES

1	INDIA OVERVIEW	1
2	WORLD PERSPECTIVE	6
3	MARKET ANALYSIS ACCESS CONTROLS	7
4	MARKET ANALYSIS CCTV	8
5	MARKET SIZE 2007 & FORECAST TO 2012	9
6	MARKET STRUCTURE - DEMAND SIDE	11
7	MARKET STRUCTURE - SUPPLY SIDE	19
8	IBMS (INTEGRATED BUILDING MANAGEMENT SYSTEMS)	22
9	INTEGR. OF TECH. SERVICES & BUSINESS ENTERPRISE	24
10	MARKET DYNAMICS & STRATEGIC OPPORTUNITIES	27
11	COMPARISON WITH CHINA & OTHER BRIC'S	28

### VOLUME II - REPORT & ANALYSIS

1	INTRODUCTION	
	PART I - MARKET ANALYSIS - SUPPLY SIDE	
	(IDENTICAL STRUCTURE FOR IBC(a) AND IBC(c))	
2	STRUCTURE & SEGMENTATION OF IBC(a,c) SALES	2.3
2.1	Market Structure and Form	2.5
2.1.1	The Status of IBC(a,c)	2.5
2.1.2	A Seven Year Performance Review	2.6
2.1.3	Market Size by Type of Hardware	2.8
2.2	Market Size by Sector	2.11
2.2.1	New Construction - Refurbishment - Retrofit	2.11
2.2.2	Public - Commercial - Industrial	2.12
2.2.3	Contract Size	2.13
2.2.4	Market Size By End User Sector	2.14
2.3	Geographic Distribution of IBC(a,c) Sales	2.16
2	PROFILE OF THE INDIAN IBC(i) MARKET	2.3
2.1	Introduction	2.5
2.2	Market Size & Growth	2.5
2.3	Suppliers	2.6
2.4	Future Demand for IBC(i) Systems in India	2.8
3	INTEGRATED BUILDING MANAGEMENT SYSTEMS (IBMS)	3.1
3.1	Market Structure and Form	3.3
3.1.1	The Status of IBMS	3.3
3.1.2	A Ten Year Performance Review	3.4
3.1.3	Market Size by End User Sector	3.6
3.2	Suppliers	3.7
4	SUPPLIER ANALYSIS	4.1
4.1	Supplier Shares	4.4
4.2	Supplier Profiles	4.9
4.3	Third Party Suppliers	4.25
5	IMPORTANCE & FUTURE PROSPECTS OF VERTICAL MARKETS	
5.1	Commercial Buildings	5.1
5.1.1	Retail Malls and Hypermarkets	5.1
5.1.2	Office Complexes	5.2
5.1.3	Hotels Tourism	5.3
5.1.4	Transport	5.5
5.1.5	Upcoming Projects	5.7
5.1.6	Hospitals	5.7
5.1.7	Leisure & Entertainment	5.10
5.2	The Industrial Sector (Industrial Clusters)	5.13

5.2.1	Special Economic Zones (SEZs)	5.13
5.2.2	Role of the State Government in setting up an SEZ	5.14
5.2.3	Government Initiatives	5.15
5.2.4	Upcoming Projects	5.15
6	TRADING PRACTICES AND PROCEDURES	6.1
6.1	Contractual Relationships in the Construction Industry	6.2
6.2	Purchasing Routes for IBC(a,c)	6.3
6.2.1	Future Trends	6.5
7	BUILDING CONSTRUCTION - STOCK - FUTURE POTENTIAL	7.1
7.1	The Indian Construction Industry	7.1
7.2	Comparison with the Biggest and Best	7.2
7.3	The Shape & Structure of the Indian Construction Industry	7.5
7.4	Commercial Construction	7.7
7.5	The Industrial Sector	7.9
7.5.1	Industrial Clusters	7.9
7.5.2	Global Manufacturing Hub	7.10
7.6	Urban Regeneration	7.13
7.7	"Green Building" Initiative	7.15
8	INDUSTRY DYNAMICS AND GROWTH PROSPECTS	8.1
8.1	The Dynamics of the Market Place	8.1
8.2	Demand Drivers	8.2
8.3	Crime Statistics	8.3
8.4	The Present Status of IBC(a,c) Penetration	8.4
8.5	Factors For and Against Growth	8.7
9	MARKET SIZE AND FORECAST TO 2012	9.1
9.1	Future Demand for IBC(a,c) Systems in India	9.2

### PART II - DEMAND SIDE ANALYSIS

10	FORCES THAT DETERMINE DEMAND	
10.1	Introduction	10.5
10.2	Demand Side Drivers	10.7
10.3	Supply Side Factors	10.12
10.4	The Future	10.14
11	CONVERGENCE OF IT & INTELLIGENT INFRASTR. IN BUILDINGS	
11.1	Introduction	11.3
11.2	What is IT-Convergence & Why is it Important?	11.5
11.3	Has IT-Convergence Crossed the Chasm?	11.9
11.4	IT-Convergence & Tech. Infrastructures Phases of Adoption	11.11
11.5	Roadblocks that have to be Overcome	11.13
11.6	Organising for IT-Converg. - Changing the Business Model	11.17
11.7	Getting the Message Across	11.21
12	TECHNOLOGY	
12.1	Overview of Technology	12.1
12.2	Product Development	12.6
12.3	Communication Standards	12.22
12.4	Web Services & XML	12.25
13	COMPARISON WITH CHINA AND OTHER BRIC'S	
13.1	Introduction - What is Driving this Vibrant Economy?	13.3
13.2	Comparison of India with Other BRIC Countries	13.7
13.3	Impact of Building Construction Market on the IBC Industry	13.9
13.4	The Drive for New Technology	13.13





### GENERAL APPENDIX

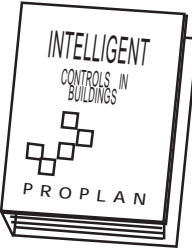



# INTELLIGENT CONTROLS IN BUILDINGS THE INDIA MARKET 2007-2012



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