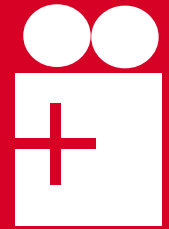


INTELLIGENT CONTROLS *in* BUILDINGS



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PROPLAN DIVISION

FIRE DETECTION & SAFETY SYSTEMS
THE EUROPEAN MARKET 2000 - 2005

DEMAND FORECAST
MARKET DYNAMICS
ROUTES TO MARKET
SUPPLIER PERFORMANCE
STRATEGIC OPTIONS
STANDARDS & REGULATIONS
TRADING PRACTICES

*All you need to know to plan
your marketing strategy in ...*

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

FIRE DETECTION AND SAFETY SYSTEMS

- The EU(7)¹ Market 2000-2005



INTRODUCTION

This study is the most detailed report published on the European market for Fire Detection and Safety Systems in Buildings. It has benefited from being a multi-client study receiving the support of the major manufacturers and suppliers and has been carried out by the same team that has worked for the last 20 years on our series of reports on Intelligent Controls in Buildings. An extensive database has been built up which has allowed the business to be analysed by 7 major segmentations and sub-sectored in many more for the markets in Belgium, France, Germany, Italy, the Netherlands, Spain and the United Kingdom. This 575 page study is presented in two Volumes with Vol. I containing the Executive Summary and inter-country comparison whilst Vol. II analyses separately, but in an identical format, the IBC(f)² market, business structure and future prospects in each of the seven countries. It segments and analyses the market on both the demand and supply side, establishes the dynamics of the business and the forces that determine demand in order to assess future potential and provide a detailed quantitative and qualitative assessment of current and future markets for intelligent fire detection and safety systems in non-domestic buildings. We have investigated the impact and incidence of IBMS³ and developments in standardised communications because these factors

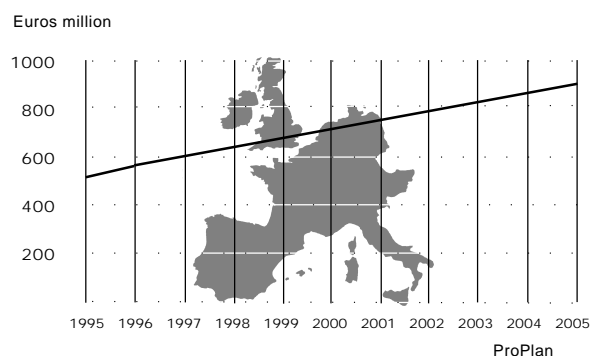
are currently creating the emergence of a new industry model throughout the world, which is bringing fundamental change to the structure of the intelligent building controls business. This report addresses the key issues so that marketing and product strategies can be developed to fully exploit the opportunities on a pan-European basis for all those involved in its supply including:

- Fire Detection & Alarm System & Product Suppliers
- Fire Extinguishing System & Product Suppliers
- Voice Evacuation System & Product Suppliers
- Security System & Product Suppliers
- Building Controls Manufacturers
- Lighting Controls Manufacturers
- Electrical Contractors/Installers and VAR's
- System Integrators
- Security/Safety Monitoring Services Providers
- Structured Cabling & Wiring Device Manufacturers
- Telecomm's & Computer Hardware Manufacturers
- Facilities Management Companies

MARKET APPRECIATION

The forces that determine profitability and attractiveness of this industry as it enters the new millennium are very favourable. There is very little direct threat from new entrants because of the barriers presented by standards and regulations, so their only practical entry is by acquisition. Buyers bargaining power is not strong because the demand side is very fragmented, although some third party suppliers have been able to exert price pressure. Supplier power is not an issue, for although 6 global companies take 60% of this business, none are sufficiently large to dominate the market and none exceed 20% share. The threat of substitutes from alternative businesses and technologies is most unlikely, although wireless technology will

EU(7) - Demand for IBC(f) 1995-2005



change the shape of the business and will extend it. The market for IBC(f) product at factory gate prices in 1999 was worth Euro 677 million, producing a total System business of almost Euro 2.0 billion and a total value added market, including maintenance of nearly **Euro 2.7 billion**.

The market has **grown at around 6% per annum** for the last 5 years, **continued growth is assured** over the next 2 years and latent potential exists for further growth through higher levels of penetration. - Pretty good for a market many perceive as being mature!

Germany and the UK account for 54% of the IBC(f) product business and together with France, these markets account for almost 74%. **Increasing market share in these three countries will have the most impact on sales performance.** The Spanish market has grown by a phenomenal 250% since 1995 and together with Italy, these markets offer the highest growth potential for there is an abundant latent potential to increase spend per square meter of floor space.

This is a good time for ambitious players in this market for this study shows that it has higher profit margins than most other markets in the intelligent building controls arena, is robust and is unlikely to undergo any major structural change in the next few years.

The supply of both product and systems can be achieved without upsetting the distribution network as few third party suppliers are interested in delivering integrated solutions. Heritage business is assured as "open systems" have made no impact on this market and are unlikely to for some time and maintenance and service provides a lucrative business.

Nevertheless, the market cannot continue to profitably support some 70 small players sharing around 40% of this fragmented market. Burdened with falling prices and small volumes they will fall prey to larger players.

The industry has generally shown lack of initiative in meeting end user requirements for Integrated Building Management Systems (IBMS) and few appear to want to take ownership of this business opportunity.

OPPORTUNITY OR THREAT

These markets are protected from outside forces and rapid technological advances by standards governing the manufacture of products and systems, codes of practise for their installation and the need for certification by an approvals body in most of the countries in which they are sold. This inhibits rapid change and also makes it very difficult for companies outside of this business to enter the market.

The harmonisation of product standards and certification throughout Europe would be the single most important factor that would "open" up this market and benefit the industry, but it is doubtful this will be achieved within the next 5 years.

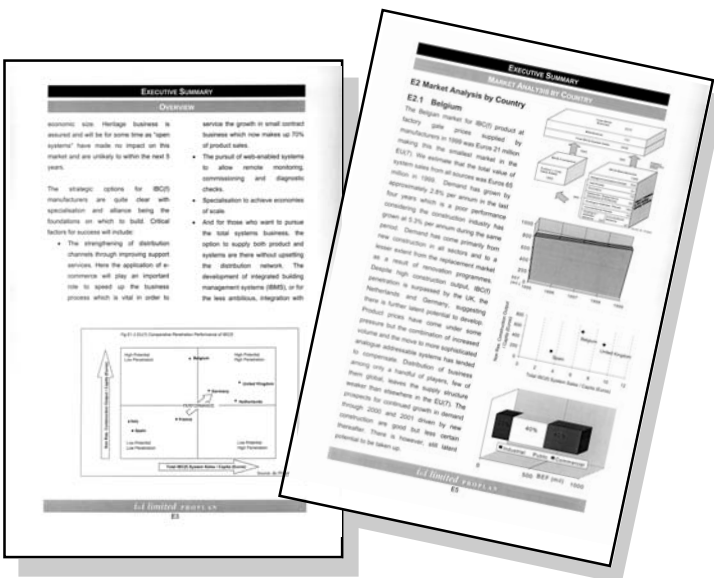
Real opportunity exists for the industry to develop a pan-European strategy for IBMS solutions, targeting specific end user building types and possibly building on the back of private finance initiatives. For some this may be the pursuit of the total systems business, whilst for the less ambitious, integration with other safety services provides plenty of scope. Support services will be strengthened through the use of web-enabled systems to allow remote monitoring, commissioning and diagnostic checks. Specialisation will enable companies to achieve economies of scale, whilst the application of e-commerce will play an important role in speeding up the business process, particularly to service the growth in small contract business which now makes up 70% of product sales.

DEFINITION

1 EU(7) includes the following countries, Belgium, France, Germany, Italy, Netherlands, Spain and the United Kingdom.

2 Our definition of Intelligent Building Controls (IBC(f)) is a Fire Detection Alarm System including all control & instrumentation (panels & supervisory computers), network supervisors and interfaces, detectors, sounders and call points for both wired and wireless systems. We have reviewed separately, Voice Evacuation Systems and Advanced Fixed Fire Extinguishing Systems and the integration of other building services with IBC(f)

3 Integrated Building Management Systems (IBMS) are control systems that integrate two or more different building services under one contract.



REVIEW

Within 575 pages and 270 charts and tables it tells you for each country:-

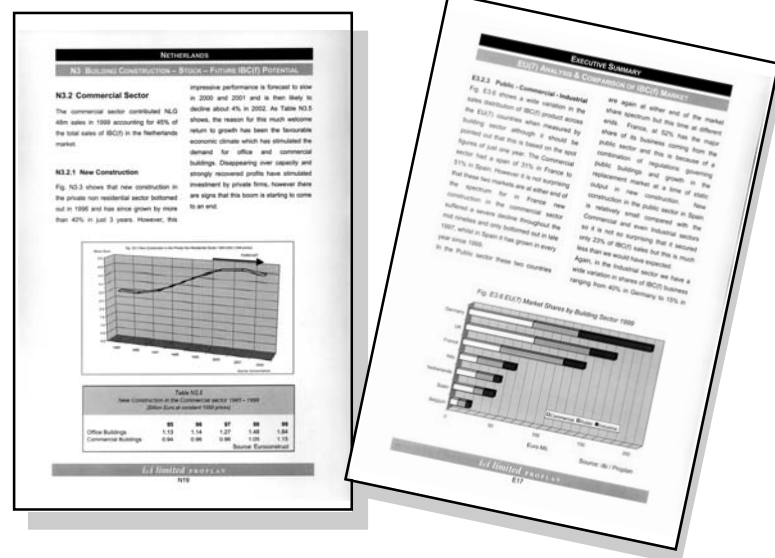
- The current market size, its growth from 1995 and forecast to 2005
- The market size by type of hardware (5 segments)
- The market size by type of detector (10 segments)
- The market size by type of project (new construction, refurbishment /replacement)
- The market size and potential by building sector (public, commercial, industrial)
- The market size by contract value (4 segments).
- The market size by type/end use of building (11 categories).
- The geographic distribution of sales
- Assessment of the markets for voice evacuation systems, advanced extinguishing controls and wireless systems
- The distribution channels and the volume of business that they handle
- Sales and market share bands for established suppliers
- Profiles of established suppliers
- The dynamics of the industry and growth prospects
- An analysis of the part played by third party suppliers including distributors, wholesaler/stockists, specialist value added resellers and electrical contractor installer and the impact they have on the business
- An analysis of trading practices and routes to market and the impact of contractual procedures
- A cross border view of the forces that determine demand
- A detailed review of technology including sections on standards, regulations, harmonisation, communication standards and systems integration
- Assesses the IBC(f) suppliers influence on Integrated Building Management Systems (IBMS) and measures the incidence of integrated projects for different building services and the incidence of integration in 7 different building types
- This report takes you through the complex web of interdependent factors in a progressive and logical way using over 260 charts and tables so that the issues that shape this market and influence change are clearly identified in order that their future impact can be assessed and the underlying trends discerned.

integration

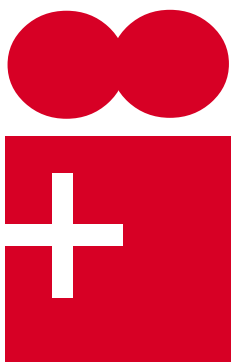
The report allows the following critical questions to be answered:

- Which is Europe's most competitive market and how has it achieved higher penetration of IBC(f) than any other market?
- Why is the penetration of optical detectors so much lower in the French market and what progress has been made by multiple sensor technology ?
- How far has the penetration of analogue addressable technology progressed and what is the future trend?
- What underlying philosophy of the market in Germany will result in a continued low proportion of sales of sounders?
- What are the barriers to entering Germany, Europe's single biggest market?
- Which market has boosted sales as a result of an innovative solution to safety interlocks and integration?
- How and where can manufacturers protect their value added systems business and what will strengthen their performance?
- Which countries offer the best opportunities to quickly develop sales?
- Is it necessary to adopt a particular communication standard or is there an alternative strategy for achieving an "open system"?
- Why has the IBC(f) industry made such little impact in IBMS in Europe? Will the recent developments in standard communication initiatives and IT change this?

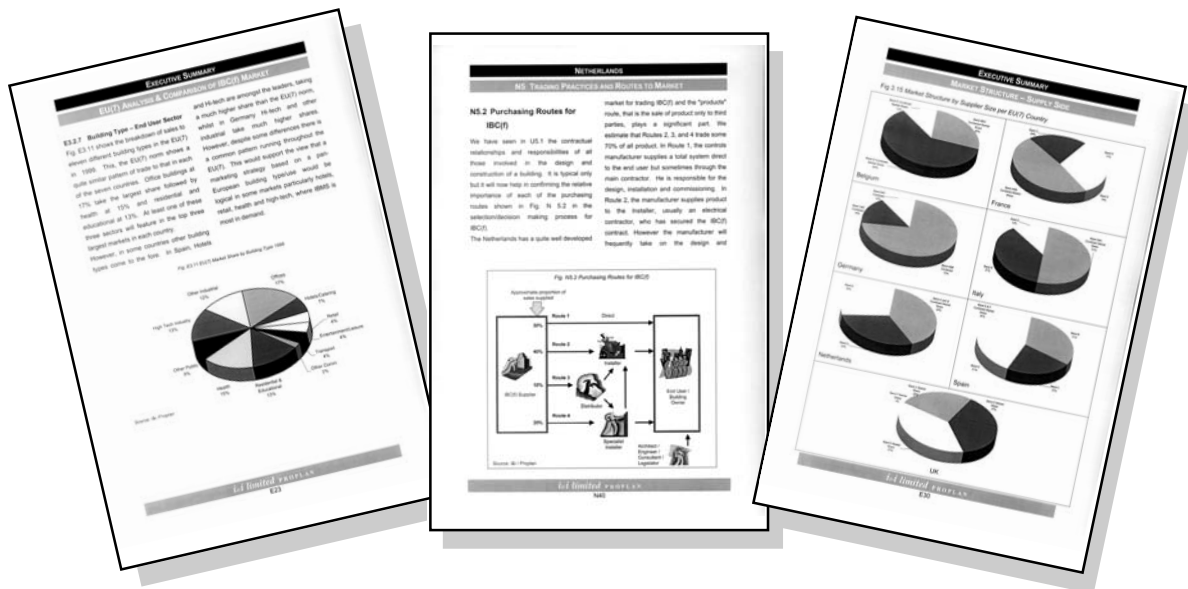
The report allows pan-European comparisons to be made across all market segments and in particular, benchmarks the penetration of IBC(f) so that future performance can be determined.



protection



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***i & i limited* - PROPLAN DIVISION**

i & i limited is Europe's leading research and consultancy company specialising in intelligent buildings. ***i & i limited*** provides a comprehensive range of professional services to suppliers, managers, government and industry. The Proplan division established in 1980 has analysed the markets and technology for building controls and services in 37 different countries in Western and Eastern Europe, Scandinavia, the Middle East, S.E. Asia and the Far East including Japan and China. Over one hundred assignments have been completed in marketing strategy, product planning, market assessment and evaluation and company/product image, using the same team of professionally qualified senior consultants. Through a series of Multi-client studies entitled "Intelligent Controls in Buildings" we have charted the progress of intelligent controls in buildings and its players for nearly twenty years. Our objective has been to provide manufacturers and suppliers with accurate information on which to develop appropriate marketing and business strategies. This has been achieved through the assistance and co-operation of our clients who comprise the major suppliers to this business. Some published research studies are listed below and include:

price pressure

Intelligent Controls in Buildings
The North American Market 1998 - 2003 (September 1999)

Intelligent Lighting Controls in Buildings
The EU(4) Market 1996 - 2001 (August 1997)

Intelligent Controls in Buildings
The European Market 1997 - 2002 (Oct' 1998) 7th Edition
5th Edition (1992), 4th Edition (1991), 3rd Edition (1990),
2nd Edition (1988), 1st Edition (1985)

Intelligent Controls in Buildings
The Asia(7) Market 1995 - 2000 (Oct 1995).
Building Controls

Intelligent Controls in Buildings
The Asia(7) Market 1995 - 2000 (Oct 1995).
Fire and Security

Intelligent Controls in Buildings
The Scandinavian Market 1999 - 2004 (June 2000) 2nd Edition
1st Edition 1994 - 1999 (Feb 1995)

Intelligent Controls in Buildings
The UK Market 1993 - 1998 (September 1994)

Intelligent Controls in Buildings
The UK Market 1989 - 1994 (published April 1990)

Variable Speed Drives for Building Services
1994-2000 (April 1994)

Strategic Planning
The European Building Controls Industry
(January 1993)

Development Opportunities for
Integrated Building Management Systems
(Sept' 1990)

Business Opportunities in Boiler Control
Systems and Instrumentation
1987 - 2000 (March 1988)

Directory of Intelligent Buildings (October 1998)

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For more information on intelligent controls in buildings visit our website www.proplan.co.uk

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