



# SECURING OUR WORLD

security systems have more than kept pace with the challenges posed by an uncertain world, and are letting the consumer take charge when it comes to a question of safety

## The global preoccupation

with security, seen in access control systems, fire recognition and avoidance systems, as well as attendance record systems across the world, is reflected closer to home in the home and office security system market. The corporate sector is the primary driver, as even small and medium companies have made the safety and security of their employees a priority. The home segment, in contrast, is growing more slowly, with high-end security solutions being installed more in premium residential structures. However, analysts say that this is set to change; and with crime on the rise, rather more initiative is needed to secure residential and commercial spaces from threats of all kinds.

## the indian outlook

India's electronic security market has experienced a higher-than-average annual growth rate of 31.8 per cent between 2008 and 2013, and is expected to reach Rs 143 billion by 2018 (Source:Security Today). Industry analysts say the market is moving from the closed circuit analog system to digital surveillance systems. Specialized video surveillance devices and intelligent video will continue to emerge as a tool to improve business efficiency, and the addition of video analytics software to surveillance solutions will enable businesses to adopt these solutions to get a new perspective.

For the future, the Indian market is projected to grow at a compounded annual rate (CAGR) of over 30 per cent over the next three years. Comprised of access control systems, surveillance equipment, alarm systems, and fire detection and protection systems,

approximately 60 per cent of the products sold in India are imported. The Indian companies too are doing their share to offer solutions and expand the segment in the country.

According to Mehernosh Pithawalla, Associate Vice President and Global Head, Marketing, Sales & Innovation, Godrej Security Solutions Division, Godrej & Boyce Mfg. Co. Ltd, Mumbai, "The growth in the Indian market has brought about a growing awareness among different end user segments. The sector is witnessing immense growth from sectors such as city surveillance, public transport, hospitality, airport security, banking, financial services and insurance (BFSI), retail, BPO, manufacturing, college campuses, infrastructure companies and education. The government is the biggest segment in terms of volume demand. Public sector undertakings are also a vertical with significant demand."

# evolution and innovation

Traditionally controlled by analog-based surveillance systems, the Indian market is now shifting towards digitized options. Mehernosh Pithawalla says, "Security systems such as CCTVs, alarm systems and video door phones (VDP) have evolved over time. CCTVs that used to record on LP video cassettes now use hard disk drives. Similarly, TFT LCD screens have over taken the older CRT screens in VDPs. Alarm systems that used automatic telephone dialers now use a GSM dialer."

Also, with a wireless alarm system, there are no wires to cut and the system components communicate with the main control panel just like miniature walkie-talkies. Trigger devices mounted on doors and windows are powered by small batteries that last up to three years and signal the control panel when they need replacing. Another technological advancement commonly used in home and business security systems is motion and body heat detectors, which can be used to track people and establish a security perimeter around a structure. They can scan up to 35 feet in any type of weather and signal the control panel if anyone violates the perimeter."

Pramoud Rao, Managing Director, Zicom Electronic Security Systems Ltd, Mumbai, says, "The concept of security systems was initiated in India with the arrival of MNCs in India who utilized several such technologies at their workplaces. With the evolution of the IT-BPO sector in India, CCTV camera surveillance system gained acceptance. Moreover, security in an organization has moved from an administrative function to an IT function as more and more features are getting integrated to the IT infrastructure. Security therefore has become more of a profit enhancer rather than a cost."

In addition to surveillance, fire detection capabilities are also now a part of a complete security system, using smoke and heat detectors to sound an alarm to alert residents when a fire is detected, and automatically dial the fire department as well. Other developments include the ability to detect carbon monoxide gas in a home or commercial building. It is a little known fact they this gas kills countless people around the world each year, and that many people don't even know when they are at risk."



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## what's on trend?

As in other segments, security systems are making rapid progress in embracing the latest advancements. Unlike the security systems of the past, which mainly set off an alarm when an intrusion was detected, new-age security systems allow homeowners to take complete control of their home security. For instance, the introduction of the smartphone has led to several application-based solutions being developed that are compatible with such phones.

The growing need for real-time security and surveillance has created opportunities for IP surveillance system integrators, and the scope has widened to the extent that analog integrators are now being trained to become IP integrators. With enterprises looking for a single network to integrate building management, access control and physical security along with a surveillance network on the same IP platform, it has become important for channel partners to build additional skill sets. Therefore, more and more vendors are training and educating partners on the benefits of IP surveillance products and solutions.

When it comes to the actual products, their appearance, design, and the technology being used are all high priorities. Pramoud Rao explains, "Technology is functional, whereas design appeals to the aesthetics of the customer.

The right mix of these two is a must for the customer to engage with the product. Security products are traditionally a low involvement category. However, there are a lot of new designs which will change the way a consumer looks at these products. We also are working on this, and will soon make these products available in the market."

Mehernosh Pithawalla adds, "This philosophy is a larger process, for which design research is very important; this is not just with respect to benchmarking, but also understanding the customer's daily needs and issues. On the basis of such research, solutions are formulated. We also make sure that most of our products are made in India, and the technology used is made in India. That is what we strongly believe in."

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how it works

## what the future holds

The Indian security industry is undergoing a paradigm shift as companies continue to redefine their strategies. Most major firms now focus on acquiring missing competencies, filling gaps in their service offerings and divesting lines of business that are not central to their competitive position. The other key drivers have been burgeoning economic development, urbanization and aggressive infrastructure activity, poverty owing to imbalanced development, asset creation, and growing consumer awareness of security risks.

Pramoud Rao says, "The next step in terms of technology will be advanced data analytics. Going ahead, individuals or organizations will have become more skillful at leveraging unstructured data to identify patterns and trends. Surveillance data or, more accurately, 'video-based data', will be increasingly used to avoid or anticipate probable risk or untoward encounters. Security systems shall evolve from monitoring people and property when an incident has occurred to providing alerts at the right time in advance about threats. The systems of tomorrow will take in video data being generated by the systems and convert this into actionable knowledge and information and a synchronized response mechanism. IOT (Internet of things) will emerge as a platform with lot of options for the new sensors, offering various solutions."

In the future, it is expected that the market will evolve hinging on government funding and international cooperation. The domestic industry is also expected to develop further and decrease dependency on international manufacturers. Economic reforms in the country are improving along with legal, tax and regulatory developments, which bodes well for the sector, as the future potential of the Indian security industry is largely subject to such reforms.

Industry watchers say a change in customer mindset is needed, particularly in the residential sector. Pramoud Rao says, "In many households, a double door or a peep hole and a watchman at the gate, defines safety. So when we talk about various products for an enhanced level of security, these are the basic barriers we have to face. Educating the customer and changing the mindset from physical security to electronic security needs to happen for the adoption of security systems to go a long way."

Finally, speaking of the changing trends and the role of security systems on a larger platform, Pramoud Rao says, "A major change that I see currently is that surveillance applications have become a prominent tool against fighting crime, and has facilitated the fight against corruption in big way. Realizing this, the government too has been framing policy in support of installing security surveillance in all public places." This augurs well for the industry and its proliferation into a larger playing field in the country. ifj

## sectoral challenges

Though the demand for security systems has been growing, the industry is still at a nascent stage in the country. Manufacturers, integrators and solutions providers face several challenges, which are a roadblock to progress. One such challenge is that the industry is sharply divided into the organized and unorganized sectors, with almost 50 per cent in the unorganized sector, which is flooded with inferior quality products from other Asian countries. The remaining 50 per cent includes big multinational players who have already created a brand name worldwide. There are also some small players that are adding significantly to the growth of the Indian CCTV sector.

The organized sector has its own share of challenges, where a few indigenous manufacturers compete with big, resource-rich brands. In the absence of a level playing field, these players find it tough to grab market share and to maintain low prices, while offering quality and brand value. Many players are making strong efforts to support their customers through value-added services and by generating awareness about the technology used and the importance of quality. Furthermore, some key companies are moving out of being just suppliers to providing complete integrated solutions. According to Mehernosh Pithawala, "Integrating security products is the direction in which the industry is moving. This will enable users to have a comprehensive solution for their overall security needs."



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