

2015

# *Land Border Security*



*Homeland Security Research Corp.*

# ***Land Border Security – 2015***

***August 2015***

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# 1 Land Border Security Market – 2014-2022

## 1.1 Scope

This chapter addresses the global Land Border Security market including but not limited to the following Land Border Security related sub-markets:

- Land Border Security electronic fencing devices and systems
- Day-night border video surveillance systems
- Border electronic fences
- Border interoperable communication systems
- Virtual border fencing systems
- Underground covert people-vehicle detection systems (e.g., geophones, fiber-sensors)
- Checkpoint, fence and barrier hardware
- Border people screening systems
- Border people and workforce biometric identification systems
- Tunnel detection systems
- Border security command, control & communication IT and hardware infrastructure
- Border fused multi-sensor information technology systems
- Nuclear trafficking screening portals
- Explosives screening portals
- Hand-held CBRNE detectors
- Border construction projects
- Workforce and visitor identification systems
- Border-perimeter nuclear/radiological screening portals
- CCTV and RFID vehicle identification systems
- CCTV and RFID people identification systems
- Day-night CCTV border surveillance systems
- CBRN detection technologies

- ❑ C2/C4ISR systems
- ❑ Communication systems & devices
- ❑ Cyber-security systems
- ❑ IT and cyber security
- ❑ Land Border Security related renovations and construction projects
- ❑ Systems service and upgrade (Service & Upgrades) business
- ❑ Training, planning and consultation services
- ❑ Government funded Land Border Security related products & systems RDT&E

## 1.2 Key Facts

- ❑ There is a profound negative effect of the economic slowdown on the Land Border Security market growth rate especially in North America and Europe.
- ❑ Illegal immigration is the leading driver behind the land border projects in north America and Europe.
- ❑ The Global economic slowdown did not affect the Land Border Security market in countries that endured substantial risk of terror, crime and public safety risks and enjoyed a relatively high government and public sector funding sources for their Land Border Security infrastructure.
- ❑ Following the September 2008 economic crisis, mounting unemployment in several key countries and regional turmoil like the “Arab Spring” Mass incidents (i.e., mass demonstrations) are an increasing problem.
- ❑ While most incidents are resolved peacefully or relatively peacefully by local public security forces, some however develop into large-scale violent clashes between masses of citizens and the ruling authorities.
- ❑ The threat and fear posed by crime, terror, and regime changing movements is real, persistent and will continue to be the key to the market’s development.
- ❑ Land Border Security systems deployed globally depend on hundreds of thousands of security personnel. These labor intensive problematic systems need to be addressed.

## 1.3 Conclusions

- ❑ The threat and fear posed by terror, crime and smuggling are real, persistent and likely to continue to be the key to market development.
- ❑ There is no effective technology to detect cross border tunnels.
- ❑ Unacceptably high false alarm rates as well as the high cost of personnel will present the industry with new business opportunities.
- ❑ As a result of global defense funding and the fierce competition over new military contracts, the defense and defense-related companies will struggle to enter and/or expand their land border security market share market by:
  1. Struggling for government funded Land Border Security RDT&E projects (e.g., MM Wave intrusion systems).
  2. Cooperation with industry primes
  3. Mergers & Acquisitions (M&A) of small-mid-sized Land Border Security manufacturers, startups and vendors.
  4. Invest in strategically located subsidiaries in fast growing countries with Land Border Security (e.g., China, India, Israel, Brazil). Many of these subsidiaries will cooperate with local companies.
- ❑ Due to the demand for ever higher cost-effective Land Border Security systems, the industry will embark on a three-pronged strategy:
  1. New high performance devices and systems without a price hike
  2. Upgrade the land border security<sup>i</sup>
  3. Advanced Service & Upgrades packages
- ❑ Embedded software will be developed to simplify the operator interface, reduce workforce costs, investments in training and minimize the “human” operator error rate.
- ❑ In the future, multi-modal Land Border Security product technology will dominate the market.

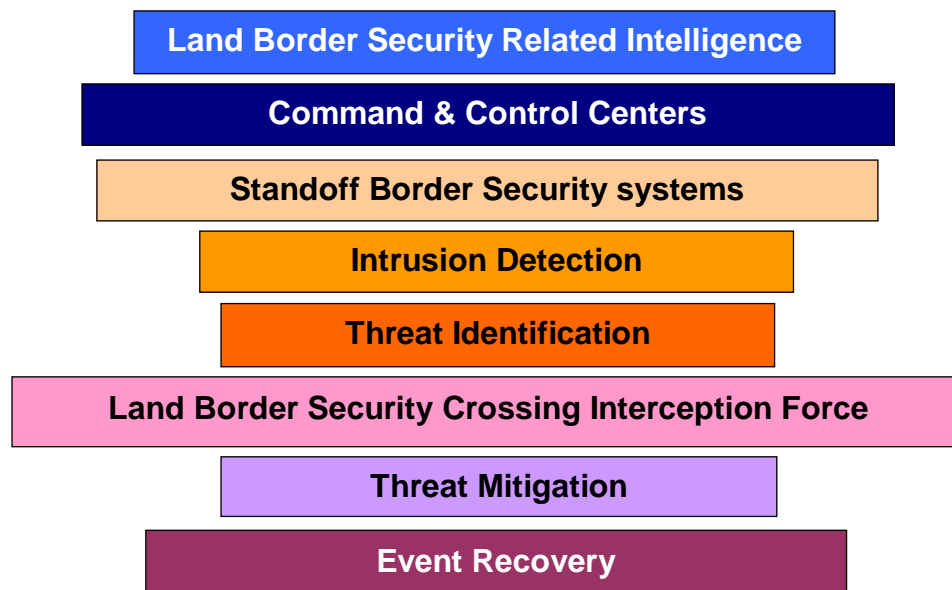
## 1.4 Market Background

It is assumed that terrorists, smugglers of people and goods and criminals will develop a capacity to understand the Land Border Security methods and develop effective counter measures. There will be a continuing cat-and-mouse effort to keep defense technology ahead of terrorist and criminal abilities.

Despite the progress and the vastly heightened government and public awareness to Land Border Security related threats, major vulnerabilities still remain. Several of the layers of defense have significant security gaps.

- Concerns about the efficacy of Land Border Security screening
- The lack of an effective response to underground tunnels
- Unauthorized access to public safety sensitive areas
- The “Guardsman Complacency” syndrome

**Figure 1 - Land Border Security, Layers of Security**



- No single Land Border Security method is perfect; the assumption is that integrated together, they do the job.
- Controlling border security systems presents a substantial task. In the U.S. alone, each year more than two billion people, 500 million motor vehicles, seven million railcars and forty million cargo containers must be inspected at international borders.

- ❑ A new emphasis on a whole-of-government approach in which Border Patrol operational elements work together with federal, state, local and tribal law enforcement partners is intended to achieve a unity of purpose and maximize operational integration to achieve a holistic approach to border security (e.g., developing intelligence, planning targeted operations, etc.).

Figure 2 - Land Border Security Threat Detection Scheme



**More information can be found at:**  
**[Global Homeland Security & Public Safety Market – 2015-2022](#)**