

2015

Private Sector People Screening Market Background



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Homeland Security Research Corp.

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1 Global Private Sector Facilities People Screening Market – 2015-2020

1.1 Market Background

The private sector people screening assurance is not just about security or privacy. Nor is it either cyber or physical. Its overriding purpose is to assure the delivery of critical services to citizens and customers. There is a significant national security interest as well as a compelling business case for public-private partnership. To set the private sector people screening investment priorities, governments can use a hierarchical decision making structure. In doing so, they can assign weights and measurements across the nation that conform to identify the private sector people screening.

Table 1 - Private Sector Visitors & Employees Screening Segments

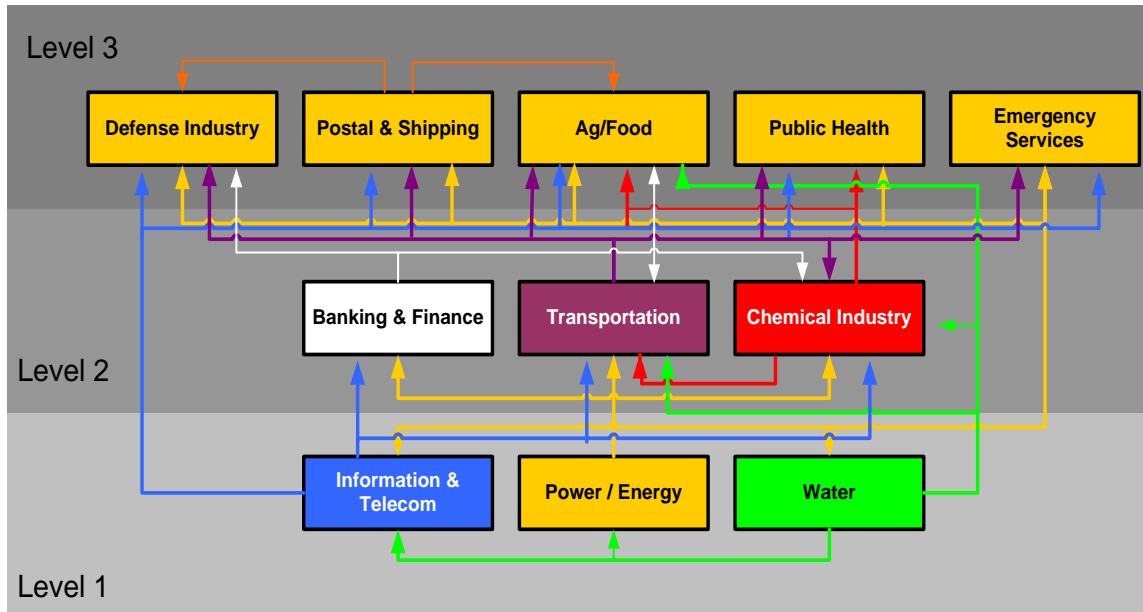
Industry	HLS Related Segments
Food Industry	<ul style="list-style-type: none"> ▪ Supply Processing/Packaging/Production ▪ Agricultural and Food Storage ▪ Agricultural and Food Transportation-Distribution ▪ Agricultural and Food Facilities
Banking and Finance Industry	<ul style="list-style-type: none"> ▪ Banking and Credit ▪ Securities, Commodities, and Financial Investments ▪ Insurance Carriers
Petrochemical and HAZMAT Industry	<ul style="list-style-type: none"> ▪ Petrochemical Manufacturing Plants ▪ HAZMAT Transport ▪ HAZMAT Storage/Stockpile/Utilization/Distribute ▪ Other HAZMAT Facilities
Defense Industrial Base	<ul style="list-style-type: none"> ▪ Shipbuilding Industry ▪ Aero-Space Industry ▪ Ammunition Industry ▪ Weapons Industry
Energy	<ul style="list-style-type: none"> ▪ Electricity Generation and Grid ▪ Petroleum ▪ Natural Gas
Information Technology Industry	<ul style="list-style-type: none"> ▪ Hardware Production Industry ▪ Software Production Industry ▪ Internet Industry ▪ Information Technology Industry ▪ Information Technology Services Industry

Industry	HLS Related Segments
Postal and Shipping Industry	<ul style="list-style-type: none"> ▪ Postal Services ▪ Shipping Industry ▪ Shipping Facilities
Healthcare and Public Health	<ul style="list-style-type: none"> ▪ Direct Patient Healthcare ▪ Public Health Agencies ▪ Healthcare Educational Facilities ▪ Health Supporting Facilities
Transportation Industry	<ul style="list-style-type: none"> ▪ Aviation ▪ Airports ▪ Seaports ▪ Railroad ▪ Road ▪ Maritime ▪ Mass Transit
Water Industry	<ul style="list-style-type: none"> ▪ Raw Water Supply ▪ Water Transportation ▪ Water Storage ▪ Water Treatment Facilities ▪ Treated Water Distribution Systems ▪ Treated Water Monitoring Systems ▪ Treated Water Distribution Control Centers ▪ Wastewater Facilities ▪ High Hazard Potential Dams
Nuclear Facilities Industry	<ul style="list-style-type: none"> ▪ Nuclear Power Plants ▪ Research, Training, and Test Reactors ▪ Nuclear Fuel Cycle Facilities ▪ Radioactive Waste Management ▪ Nuclear Materials Transport ▪ Deactivated Nuclear Facilities ▪ Radioactive Material Users ▪ Radioactive Source Production and Distribution Facilities
Telecommunications Industry	<ul style="list-style-type: none"> ▪ Wired Telecommunications ▪ Wireless Telecommunications ▪ Satellite Telecommunications Internet ▪ Next Generation Networks

Most importantly, a detailed national plan must be implemented to identify how interrelated health and emergency management functions will be coordinated to ensure an orderly, immediate, and unified response to terror threat. The figure below depicts how for example, the energy sector is interconnected with the other sectors of the private sector people screening. If a terrorist attack is perpetrated against the power/energy sector, it is obvious that a greater overall effect could certainly be part of the problem. This is especially true when the result of the attack makes the repair of the problem difficult. If the time that the

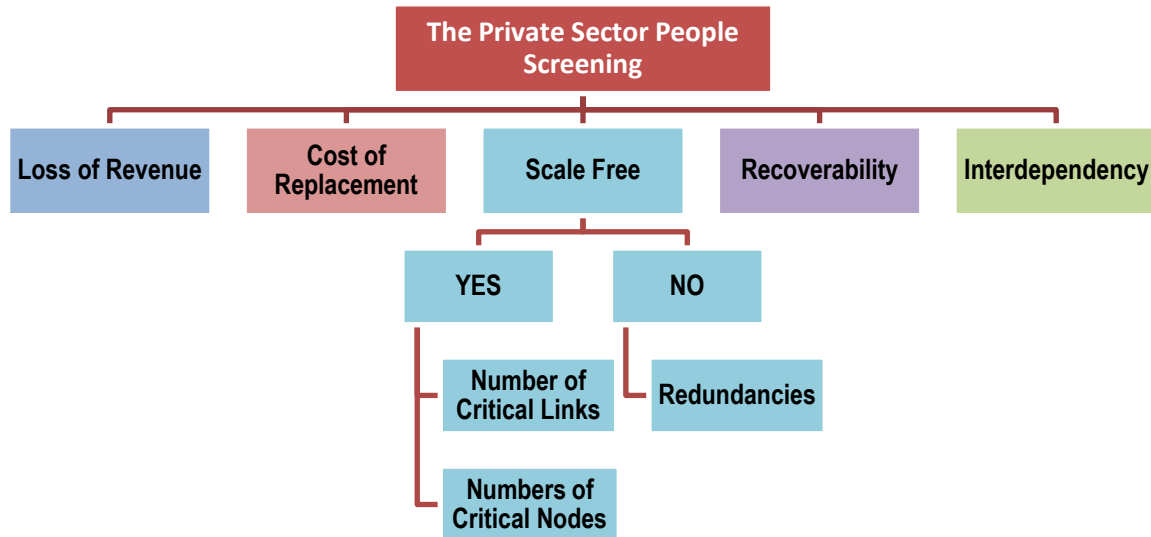
power/energy sector is down is extensive, the effectiveness of the attack is greater. The power/energy sector needs to factor in a quick repair and turnaround time. Spare parts should be common and available on a moment's notice.

Figure 1 - Hierarchy of the Private Sector People Screening



The investment priority program can be used by all sectors to analyze the difficult choices presented to them in figuring out the policies of how to cope with an attack on each and every sector. “Where to place resources?” is certainly a question that comes to mind. “Where to spend money on buying equipment?” are always options that need to be decided. The possibility of joining with competitors and sharing the cost of ensuring the network continues to operate should be explored.

Figure 2 - The Private Sector People Screening Investment Priorities Scheme



The main challenges/opportunities facing the industry over the 2015-2020 period are:

Improve security quality – The private sector people screening systems used for the detection-interception of threats are still some ways away from delivering error-free performance. There is an urgent need to improve the detection rate to upwards of 95%, and reduce false alarm rates to less than 0.1% level. Although various vendors claim to meet these criteria, these claims must be tested and proven in the field. The figures cited above are related to the worst-case threat option if we are to provide relevant detection in an environment of ever-increasing terrorist skill and resources.

Table 2 - Private Sector People Screening Sub-Market Growth Sectors

Private Sector	Market Prospects	Features
Defense Base Industry	Medium	Driven by government regulations
Electric Utilities	High	On high alert in view of terror and natural disasters
Oil & Gas	High	Driven by vulnerability and business continuity concerns
Drinking Water Utilities	Medium	Advanced security technology is engaged to protect water utilities
Chemical-HAZMAT installations	High	Emphasis on hazmat facilities close to urban areas
Dams, Tunnels and Dikes	Low	Low Priority
Emergency Services	Medium	High priority in view of a natural disaster threat

Private Sector	Market Prospects	Features
Nuclear Industry	Medium	Nuclear energy accounts for about 30% of the global total electricity production
IT & Communications	Medium	Key to other the private sector people screening sectors
Transportation	Medium	Priority on national security transportation hubs

Concurrent multiple-threat detection – Developing the private sector people screening multi-threat detection capabilities is an absolute must if we want to rely on such systems to deliver adequate protection.

Reduce cost of operation – The cost of each individual use of the system(s) on a single private sector people screening transaction must make economic sense for these systems to become widely used.

Increase automation – For effectiveness and throughput to increase and for the cost of transaction to come down, detection systems must become almost fully automated. Human participation in the screening and analysis process is the major cause for human errors and sluggish throughput.

Reduce throughput delays – Delays should be reduced to near zero, so systems can operate at capacity during the time of peak demand.

Ease of integration – The private sector people screening systems should be easily integrated with larger security setups such as biometrics, databases, and communications networks.

More information can be found at:

[Global People Security Screening: Technologies, Industry & Market – 2015-2020](#)