Safety and Security in Poland

Overview

In general, the Polish market for safety and security equipment continues to be a promising market for U.S. suppliers. Poland is the sixth largest country in the EU with a population of nearly 38 million people. Its 1,100-kilometer eastern border is now the largest external border in the European Union. Since Poland became a member of the European Union, all external security matters must comply with the “Common European Security and Defense Policy”, which defines external action through the development of military and civilian management capability. With EU accession, Poland has been obligated to meet EU safety and security requirements. These requirements created some fruitful business opportunities for producers and distributors of advanced safety and security products.

As a member of both NATO and the EU, Poland shares the same security priorities as its U.S. and European allies. In Poland, as in other markets, a strong emphasis has been placed on homeland security, transportation and critical infrastructure protection. Key areas of interest include energy facilities, defense installations and other high-risk facilities. EU member countries are collaborating on the European Program for Critical Infrastructure Protection, a strategy to defend citizens from terrorism and protect against all hazards including natural disasters and industrial accidents, and the Detection Technologies Program, which is focused on detection technologies in the broadest sense including metals, biometrics, CCTV, and associated technologies (gas detection, etc) as well as explosives (including chemicals), bio-preparedness, radiology and nuclear preparedness.

Poland was heavily involved in stabilizing Iraq and is still involved in Afghanistan. In addition, Poland faces threats that, while generally do not originate indigenously, nevertheless pose serious challenges including the risks from international terrorism, organized crime, and illegal immigration. As a result Poland strives to improve its capacity to deal with any potential instability resulting from these or other threats. Industrial safety awareness is also on the rise, providing opportunities for producers of safety products.

Poland received the “lead nation” status in the 2012 edition of the European Cup Soccer Championships - EURO 2012. The EURO 2012 event, organized jointly with Ukraine, obligates Poland to respond to new challenges including strengthening and coordinating the public safety
and security of the entire country and its borders. This responsibility includes enhanced protection against terrorism and other threats at major airports and border crossings, sport facilities and other public places. It also offers an open and accessible import market in which American technology firms have excellent reputations for their quality and innovative implementation of new technologies. Poland will become a major end-user of all types of safety/security equipment and systems including: electronic access control systems, surveillance cameras, closed circuit television (CCTV) systems, fire detection and extinguishing equipment, high-technology explosive and narcotic detection solutions, and walk-through scanners that scans individuals, etc.

In conjunction with security requirements generated by the hosting of the EURO 2012, the European Commission has provided a large amount of funds. Included is funding for the first phase of the long planned Terrestrial Trunked Radio (TETRA) nation-wide digital radio communication systems. Funding is also available for surveillance (primarily closed circuit TV systems) of public areas, sports facilities and city monitoring systems, and upgrades to security services command and control centers. All EURO 2012 procurements will be done at the national and municipal levels.

Poland has been a cooperative partner in several EU led security initiatives including the European Security Research Program valued at more than 1.4 billion EURO. The aim of the program is to protect against dangers such as terrorism, crime and natural disasters. Funds are available from 2007-2013 as part of the 7th Research Framework Program to fund projects to improve civil security. Areas covered include: security of citizens, infrastructure, and utilities; intelligent surveillance and border security, and restoring security and safety in case of crisis. Three horizontal issues include security system integration, interconnectivity and interoperability, security and society, and security research coordination and structuring. The research program concerns civilian security forces only. In relation to biometrics, the European Commission is considering a centralized fingerprint database to facilitate the exchange of information among EU law enforcement agencies to help tackle organized crime and terrorism.

**Best Prospects/Services**

The United States, traditionally the largest supplier of up-to-date safety and security equipment, has good potential to serve the Polish safety and security market. However technological advantage is not the only factor determining success in the market. Local conventional wisdom is that you “sell the engineers” first. American companies should focus in the beginning on educating systems users and other players in the distribution network channel. And after a partnership has been struck, a successful exporter should strongly support its local agent at trade shows, seminars and conferences, and in advertising.

European and Israeli manufacturers are the main competitors to U.S. firms. They have been aggressively marketing their products and services in Poland. Firms from EU countries have
recently increased market share due to their competitive price as well as EU funding for Poland. Current interest focuses on homeland security, transportation and critical infrastructure protection including protection for government and other official buildings along with embassies and high-risk facilities, defense installations, airports, power plants and energy facilities, and high density public spaces and events. This creates opportunities for U.S. security and safety manufacturers in the following areas: systems for security and surveillance, airport passenger and baggage (cargo) screening control systems, camera enclosures, walk through metal and explosive detectors, hand held detectors, access control and alarm monitoring systems, surveillance and detection equipment, codified access supplies, alarm systems and electrical signaling, and other types of advanced safety equipment.

**Opportunities**

After the events of September 11 in the United States and consecutive terrorist attacks in Europe including London and Madrid, Poland has placed a significant emphasis on the security of critical infrastructure within the country and its borders. There are several factors driving an increase in the sales of security products and services in Poland. Among contributing elements are:

- The terrorist attacks mentioned above,
- Poland becoming a member of NATO in March 1999, and in doing so agreeing to upgrade its military security to meet NATO goals,
- Poland becoming a member of European Union in May 2004, and in doing so agreeing to upgrade its eastern border surveillance system to meet EU safety and security requirements,
- Poland becoming a close U.S. ally in Europe through its support in international intervention (Iraq and Afghanistan), and in doing so becoming a potential target for terrorist attacks,
- Poland’s plans to host the EURO 2012 - European Football Championships, and in doing so will be required to respond to new challenges including safety/security issues.

Poland’s geographic location within Europe makes it a logical gateway for legal and illegal immigrants entering the European Union. Law enforcement experts indicate that drug and weapons traffickers transporting their prohibited cargo into the rest of Europe also use the pathways used by illegal immigrants. Further, there are strong requirements within the EU which intensify the demand for added controls at the Polish airports, seaports, and land borders. Finally, Polish military involvement in Afghanistan contributes to a heightened interest in security products and services against terrorism.

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