

Consultation on an Industrial Policy for the Security Industry

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The objective of this consultation is to collect the views and opinions of all relevant security industry stakeholders on the main challenges faced by the European Security Industry. This will help the Commission to identify the main policy measures to overcome the current fragmentation of the EU security market and to strengthen the industrial base. This collected information will serve as a basis for the Impact Assessment and subsequently influence the Communication on an Industrial Policy for the Security Industry.

1. Respondent profile

1.1. Name (optional) (between 1 and 100 characters)

1.2. Please provide an email adress where we can contact you (optional) (between 1 and 100 characters)

1.3. You are/you represent* (compulsory)

1.4. Name of Organisation* (compulsory) (between 1 and 200 characters)

1.5. Job title (optional) (between 1 and 150 characters)

1.6. Day-time phone number (optional) (between 1 and 100 characters)

1.7. In which country are you/is your organisation based? Please specify* (compulsory)

1.8. What is your/your organisation's main sector of activity?* (compulsory) (between 1 and 250 characters)


1.9 What security solutions does your company produce/offer?

(optional) (between 1 and 300 characters)

2. Market Fragmentation

2.1.1. Certification/conformity assessment procedures

Problem definition

	Do not know	1	2	3	4
Do you agree that the lack of harmonised certification/conformity assessment procedures for security technologies affects the market fragmentation?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
(ranking from 1 do not agree at all to 4 agree very much)					
 (compulsory)					

2.1.2. Please indicate on a level of 1 to 4 which of the policy options described below do you think is most effective and realistic to reduce market fragmentation:

(1 no effect, 4 very strong effect)

	Do not know	1	2	3	4
Option 1: No change - certification/conformity assessment procedures will continue to be regulated by national systems. * (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 2: EU wide harmonised certification/conformity assessment procedures covering all (or at least as many as technically possible) security products * (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 3: Step by step: certification/conformity assessment procedures focused on certain priority areas or priority technologies where there is a clear EU added value. * (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other option

(please describe - upload of additional documentation is possible)

(optional) (between 1 and 500 characters)

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2.1.3. Could you please specify for which products, technologies and/or systems you experienced problems due to differing national certification/ conformity assessment procedures?

(optional) (between 1 and 500 characters)

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2.2.1 Standardisation

Problem definition

	Do not know	1	2	3	4
Do you agree that the lack of EU wide standards for security affects the market fragmentation? (ranking from 1 do not agree at all to 4 agree very much)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* (compulsory)					

2.2.2. Please indicate on a level of 1 to 4 which of the policy options described below do you think is most effective and realistic to reduce market fragmentation:

(1 no effect, 4 very strong effect)

	Do not know	1	2	3	4
Option 1: No change: continue the ad-hoc, piece meal approach whereby the Commission mandates the ESO's to develop EU-wide standards based on immediate needs. In parallel industry develops on its own initiative EU-wide standards.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* (compulsory)					
Option 2: Industry driven - the Commission would stop mandating the ESOs to develop standards, but would leave this process entirely to industry*	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* (compulsory)					
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Option 3: Step-by-step end-user driven standardisation based on a careful identification of existing, national, European and international standards, via Commission mandates to ESO's* (compulsory)

Other option

(please describe - upload of additional documentation is possible)
(optional) (between 1 and 500 characters)

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2.3. Follow up question on market fragmentation I

Could you please specify for which products /technologies and/or systems would you consider EU-wide standards most needed to overcome market fragmentation (upload of additional documentation is possible)?

(optional) (between 1 and 500 characters)

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2.4. Follow up question on market fragmentation II

Do you consider it useful to include in a possible certification assessment procedure not only products, but also systems (a number of interconnected technologies) and processes (multiple technologies + related services)? (Upload of additional documentation is possible)

* (compulsory)

- Do not know
 Very useful
 Somehow useful

 Not Useful

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2.5. Further suggestions

Do you recommend any additional measures that would effectively tackle market fragmentation (upload of additional documentation is possible)?

(optional) (between 1 and 500 characters)

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2.6. Subsidiarity principle

Do you consider that action by the EU would be necessary to reduce the market fragmentation?

* (compulsory)

Do not know

Yes

yes, partly

No

3. Fragile industrial base

3.1.1. Could you please provide your views on a level of 1 to 4 on the fragility of the industrial base:

(1 do not agree at all, 5 agree very much)

	Do not know	1	2	3	4
Do you agree that the EU security industrial base is fragile?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

* (compulsory)

3.1.2. Could you please elaborate on what this fragility of the industrial base consists of in your view:

(1 do not agree at all, 4 agree very much)

	Do not know	1	2	3	4
Fragile in terms of third country competition* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fragile in terms of development of state of the art technologies* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Fragile in terms of access to finance* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Fragile in terms of dependency from
the primes* (compulsory)

Other option

(please describe - upload of additional documentation is possible)

(optional) (between 1 and 500 characters)

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3.2. Pre Commercial Procurement

Please indicate on a level of 1 to 4 which of the policy options described below do you think is most effective and realistic to reduce market fragmentation:

(1 no effect, 4 very strong effect)

	Do not know	1	2	3	4
Option 1: No change Pre-commercial Procurement in the area of security would be solely done on a national level* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 2: Pre-commercial procurement activities would be carried out in FP8 but without specific financing instruments* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 3: A focused pre-commercial procurement scheme being built up via the possible future FP8 and/or CIPII funding.* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other option

(please describe - upload of additional documentation is possible)

(optional) (between 1 and 500 characters)

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3.3. Defence and Security Procurement

Please indicate on a level of 1 to 4 which of the policy options described below do you think is most effective and realistic to reduce market fragmentation:

(1 no effect, 4 very strong effect)

	Do not know	1	2	3	4
Option 1: No change - The Defence Procurement Directive will now provide a clear and sufficient framework to contribute effectively to reducing market fragmentation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* (compulsory)					
Option 2: Encourage security customers to pool their investment resources in order to achieve interoperability and economies of scale.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* (compulsory)					

Other option

(please describe - upload of additional documentation is possible)

(optional) (between 1 and 500 characters)

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3.4. Synergies between civil and defence technologies

Please indicate on a level of 1 to 4 which of the policy options described below do you think is most effective and realistic to reduce market fragmentation:

(1 no effect, 4 very strong effect)

	Do not know	1	2	3	4
Option 1: No change - the Commission would continue to coordinate research activities between FP7 and EDA on an ad-hoc basis * (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 2: Strengthening synergies between civilian and defence technologies in a step by step	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

approach via more upstream coordination at the level of capability development and more downstream coordination at the level of development of standards* (compulsory)

Option 3: In addition to option 2, this option would go beyond coordinated research activities by establishing a dedicated civil-military research programme as part of FP8* (compulsory)

Other (please describe - upload of additional documentation is possible) (optional)
 (between 1 and 500 characters)

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3.5. International markets

Please indicate on a level of 1 to 4 which of the policy options described above do you think is most effective and realistic to reduce market fragmentation:
 (1 no effect, 4 very strong effect)

	Do not know	1	2	3	4
Option 1: No change - the EU would not undertake any specific activities to encourage access to third markets for the EU security industry* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 2: Opening up of international markets for security products by making full use of the EU's trade policy strategy.* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 3: In addition to option 2 - the Commission would aim at fostering the adoption of joint or common approaches at international level, notably in the area of standards via the International Standardisation Organisation. The approach would also provide an opportunity to raise the visibility of the European security	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

industry around the world.* (compulsory)

Other option

(please describe - upload of additional documentation is possible)

(optional) (between 1 and 500 characters)

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3.6. Third party limited liability protection

Please indicate on a level of 1 to 4 which of the policy options described above do you think is most effective and realistic to address the issue of third party limited liability protection:

(1 no effect, 4 very strong effect)

	Do not know	1	2	3	4
Option 1: No change - under this option the EU would not get involved in Third Party Liability issues* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 2: Introducing harmonised rules at EU level on Third Party Liability Limitations for security products/processes/systems in case of a terrorist incident. Under this option the EU would define under which circumstances and conditions companies/system operators could invoke Third Party Liability Limitation. The EU would also define the minimum or maximum financial compensation up to which companies/system operators would be liable for* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 3: Encouraging Member States to introduce such legislation at national level with the Commission as guardian of the Treaty ensuring that such a decentralised approach does not lead to internal market barriers. Under this option, the Commission would set out guidelines to help Member States in setting up Third Party Liability Limitation schemes that would not be contradictory between different Member States,	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

thus leading to internal market

barriers* (compulsory)

Other option

(please describe - upload of additional documentation is possible)

(optional) (between 1 and 500 characters)

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3.7. Follow up question on third party limited liability market fragmentation

Could you please specify whether you experienced problems regarding third party liability on a national and/or EU wide level? (Upload of additional documentation is possible)

(optional) (between 1 and 500 characters)

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3.8. Further suggestions

Do you recommend any additional measures that would effectively strengthen the security base in the EU (Upload of additional documentation is possible)?

(optional) (between 1 and 500 characters)

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3.9. Subsidiarity principle

Do you consider that action by the EU would be necessary to reinforce the industrial base?

* (compulsory)

Do not know

Yes

Yes, partly

No

4. Securing the citizen and the society

4.1.1. Problem definition

	Do not know	1	2	3	4
Do you agree with the problem definition, that security products need to be privacy compliant from the development to the production? (ranking from 1 do not agree at all to 4 agree very much)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* (compulsory)					

4.1.2. Which option, on a level of 1 to 4 do you think is effective and realistic to ensure that the ethical/societal dimension of security is introduced in an industrial policy for the security sector?

(1 no effect, 4 very strong effect)

	Do not know	1	2	3	4
Option 1: No change - privacy by design would remain a voluntary effort for industry with no EU wide guidelines and/or requirements* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 2: A voluntary certification/conformity assessment system. Under this option the economic operator wishing to have his product/process/system certified for being "privacy by design" fit, would have to fulfil a set of requirements defined by the EU. However, the certification/conformity assessment itself would remain voluntary.* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 3: In addition to option 2 - the certification certification/conformity assessment would be mandatory* (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other option

(please describe - upload of additional documentation is possible)

(optional) (between 1 and 500 characters)

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4.2 Certification procedures

Do you believe it to be useful to merge a possible ethical certification procedure as detailed in point 4.1. should be with the certification procedures outlined in point 2.1, instead of having two separate certification procedures?

* (compulsory)

Do not know

Very useful

Somehow useful

Not useful

4.3. Research on Privacy compliant technologies

Which option, on a level of 1 to 4 do you think is effective and realistic to ensure that the ethical/societal dimension of security is introduced in an industrial policy for the security sector?:

(1 no effect, 4 very strong effect)

	Do not know	1	2	3	4
Option 1: No change - Through targeted research projects in the Security Theme of the FP aimed at developing "privacy by design" technologies. These technologies could then be applied in future security products, processes or systems. * (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Option 2: Making the privacy compliance a mandatory evaluation criteria for all technology related research proposals under the Security Theme of the FP. Under this option, the EU would make it mandatory to address privacy by design in all technology related research proposals of the Security Theme of the FP. * (compulsory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other option

(please describe - upload of additional documentation is possible)

(optional) (between 1 and 500 characters)

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4.4 Further suggestions

Do you recommend any additional/other option that would effectively reinforce the ethical/societal dimension of security in the envisaged industrial policy for the security sector (upload of additional documents is possible)?

Please elaborate

(optional) (between 1 and 500 characters)

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5. Final questions

5.1 Are you aware of any initiatives in your country that have one of the above goals in mind (upload of documentation is possible)

a) Reducing market fragmentation

(optional) (between 1 and 500 characters)

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5.1. b) Strengthening the industrial base. (optional) (between 1 and 500 characters)

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5.1. c) Introducing the ethical/societal dimension in security technologies. (optional)
(between 1 and 500 characters)

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