



Acting as the voice of the **security industry**

Confederation of European Security Services

Guarding, CIP and National Associations Meeting

Online, 17 April 2026 from 10:00 to 13:00





Welcome and reminder of the EU Competition Rules



Outlining the concept and objective of the joint meeting

- **In line with current thought process on making our content more adapted to our audience**
 - Joint meetings to address matters of common interest for several Committees and the National Associations
 - Webinars (e.g. Standards, Drones, Insider Threat)
- **Avoid repeating the same EU briefings in several Committees**



National Market Report - Italy

Dr. Alberto Ziliani, ConFederSicurezza



Private Security

Italy Country Report

An in-depth analysis of the private security sector in Italy: structure, economic performance, cyclical trends and future outlook.

Key Sector Highlights



Structure

1,505 total companies, 423 certified. The South South and Islands account for 52.5% of certified companies.



Economic Value

Revenue of €4.3 billion. Large and medium-medium-sized companies generate 93.2% of 93.2% of turnover.



Employment

More than 112,000 employees. Lombardy and Lazio alone account for 57.4% of the workforce.



Business Outlook

Business performance improving (balance 62). Revenues rising. Employment slightly declining.



Innovation

39% invested over the past 2 years. Average innovation spend at 16% of turnover.

EMPLOYMENT

Over 112,000 Employed in the Sector

The breakdown by macro-area shows the **North West** with 35.781 employed (31,9%), the **North East** with 31.460 (28,1%), the **Centre** with 32.304 (28,8%), the **South and Islands** with 30.622 (27,3%) and the **South West** with 29.833 (26,6%). Lombardy and Lazio alone account for 57,4% of those employed.



Industry Summary and Outlook

→ Growing Sector

Revenue at 4,3 billion euros, rising revenues and accelerating innovation (average spend at 16% of revenue).

→ Concentration and Fragility

57 large companies generate 77,3% of revenue; 77% of certified firms break even with minimal margins.

→ Evolving Demand

Client companies are increasing investments in security, with cyber security as the main item (59,7%).

→ Security Manager: Strategic Role

Present in 52,2% of companies, considered important by 64,5%. Demand for this role is set to grow.



Revenue: Trends

Revenue

The revenue indicator is improving and is expected to increase further. The trend is improving compared with the last two years.

Improved	32,4%
Unchanged	50,0%
Worsened	17,6%

Access to Credit and Payment Times

Access to Credit

More companies are applying for credit. Among these:


- **59,2%** for liquidity and cash
- **33,8%** for investments
- **7,0%** to restructure debt

The **59,7%** had the request fully approved, 7,5% partially, and 12,3% approved.

Payment Times

Payment times have lengthened for **31,3% of companies**. Further lengthening is expected in the near future.

North West	33,8% extended
Central	32,0% extended
North East	29,2% extended
South and Islands	28,4% extended

 42,2% of companies report an increase in prices charged by suppliers, especially among companies with more than 50 employees. Liquidity is the indicator that has grown the least.

Services Delivered and New Investments

Institutional services account for **75,6%** of the services delivered, followed by other services such as stewards, hostesses, bouncers, consulting, and investigations (**30,2%**).



Anti-theft and Video Surveillance

36,7% of companies plan it as a new service



Cyber Security

20.0% of businesses plan to invest in cybersecurity



Drone Surveillance

15,6% of companies are planning drone services



Investigative Services

11,1% plan advanced investigative services



39% of companies have invested over the past two years

Investments Made

39% of companies have made investments over the past two years. these, **76%** introduced process, organizational, managerial and/or innovations.

- ✓ Average spending on innovation is **16% of total revenue**. Large Large companies invest the most.

Measures to Revitalize the Sector

The main measures considered necessary to revitalize the sector:

- **46,7%** — Confirm/expand private management of events, services and initiatives
- **37,8%** — Review and transparency of the Public Procurement Code for security service tenders

Sector Outlook: Cyclical Summary

Sector Performance

Positive multi-year trend.

Company Performance

Improving compared with the last two years.

Revenues

Improving trend.

Employment

Slight deterioration expected; financial capacity largely unchanged.
unchanged.

Distribution by Size Class and Macro Area

The size structure varies significantly across macro areas: the North is characterized by larger firms, while the South has a higher share of micro and small firms.

Area	Micro (1–9)	Small (10–49)	Medium (50–249)	Large (>249)
Northwest	9,9%	28,2%	43,7%	18,3%
Northeast	4,3%	38,3%	44,7%	12,8%
Center	8,0%	41,3%	25,3%	25,3%
South and Islands	13,1%	46,1%	32,5%	8,3%

Perception of Discrimination at Work

The majority of employees agree that discrimination is absent in their workplace, highlighting widespread support for equal treatment and opportunities.

Statement	Agree	Disagree	I don't know
Women are not subject to discrimination	76,2%	14,3%	9,5%
People of different religions are not discriminated against	73,3%	6,7%	20,0%
People with different ethnic backgrounds are not discriminated against	71,4%	9,5%	19,0%
LGBTQIA+ people are not discriminated against	64,8%	8,6%	26,7%
People with disabilities are not discriminated against	63,8%	11,4%	24,8%



MILANO CORTINA
2026



The role of private
security during the Milano
Cortina 2026 Olympic
Games

During the Milano Cortina 2026 Winter Olympics, almost 200 Security Guards were deployed



Protected targets

Security Guards were used mainly to control access to the competition venues (sports arenas), including through the use of X-ray screening equipment

Protected events

- Opening and closing ceremonies of the Olympics
- Competitions inside the arenas



The Milano Cortina 2026 Winter Olympics have been described as a success by the international press, an example to follow also for the organizing committees of future Olympics, including from a security perspective



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Disaster Preparedness

Exchange on EU and national activities





About the EU Preparedness Union

The European Commission launched last year an [EU Preparedness Union Strategy](#).

Goals:

- Enhance preparedness in civil protection.
- Preserve vital functions of societies during emergencies.
- Whole-of-society and PPP approach.





Activity pillars of CoESS related to the Preparedness Union



**Workforce availability &
Social Partner Action**



**Technological basis for
PPPs and info exchange**



**Better regulation, trust-
building and recognition**



Pillar I: Workforce availability and Social Partner Action

The European Commission (DG EMPL) is preparing work with Social Partners on workforce availability and preparedness training in essential services. CoESS works with the unions (UNI Europa) on the following:



- Public procurement as condition for preparedness
- Recommendations for attractive careers and training in security (INTEL Project)
- Active involvement in EU Social Partner Preparedness Summit
- Possible EU-funding project on preparedness tasks and skills in private security (INTEL III) - associations can be partners

Lead: CoESS Social Dialogue Committee



Pillar II: Technology, PPPs and info exchange

The European Commission (DG HOME) is preparing an EU Regulation on Critical Communication Systems to enhance preparedness for large-scale emergencies. CoESS activities:



- Highlight role of Monitoring and Alarm Receiving Centers (MARC) for crisis management and response
- Call for an obligation for Member States to modernise their alarm dispatch frameworks between MARCs and PSAPs

Lead: CoESS Monitoring and Remote Surveillance Committee



Pillar III: Regulation, trust-building and recognition

The European Commission (DG ECHO) is preparing several initiatives to enhance PPPs in disaster management. CoESS activities:



- Contribution to EU Baseline Preparedness Requirements for Member States
- Membership request for EU Preparedness Taskforce
- Contribution to EU Public-private emergency protocol

Lead: CoESS Guarding & CIP Committees

Are you involved in similar activities with public authorities at national level?





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Missions and equipment





CoESS Report - Survey on Bodycams



Survey on Bodycams - March 2026 - 13 countries

11 EU

- Netherlands
- Belgium
- Romania
- Portugal
- Germany
- Slovenia
- Estonia
- Sweden
- Finland
- France
- Croatia

2 non-EU

- United Kingdom
- Switzerland



Focus of the Survey

Legal framework:

- Authorised or not for 1) police 2) private security in a) publicly accessible spaces and b) in shopping centres or large retail stores
- Entity responsible for deployment and processing of the recordings
- Who may access the recordings
- Legal requirements regarding data storage and processing
- Transparency requirements

Operational use:

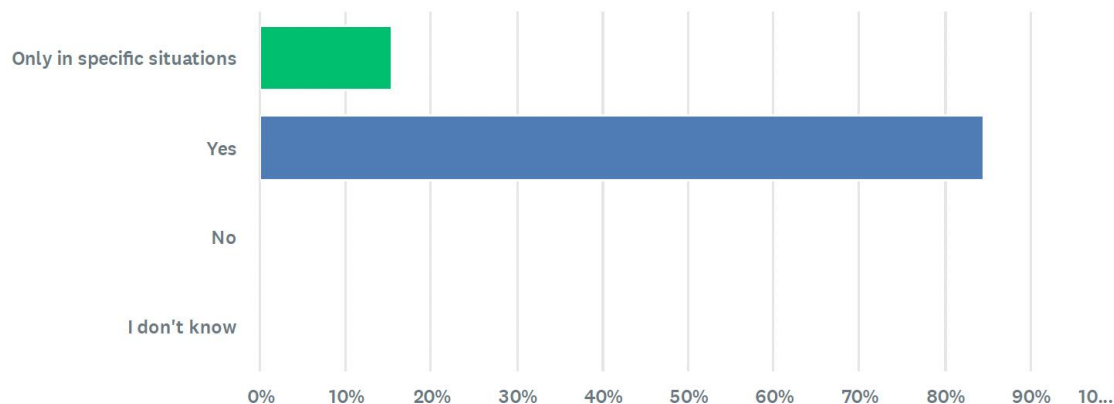
- Storage: location and duration
- Ability to transfer recordings to a monitoring centre or control room



Bodycams: status for police and for private security

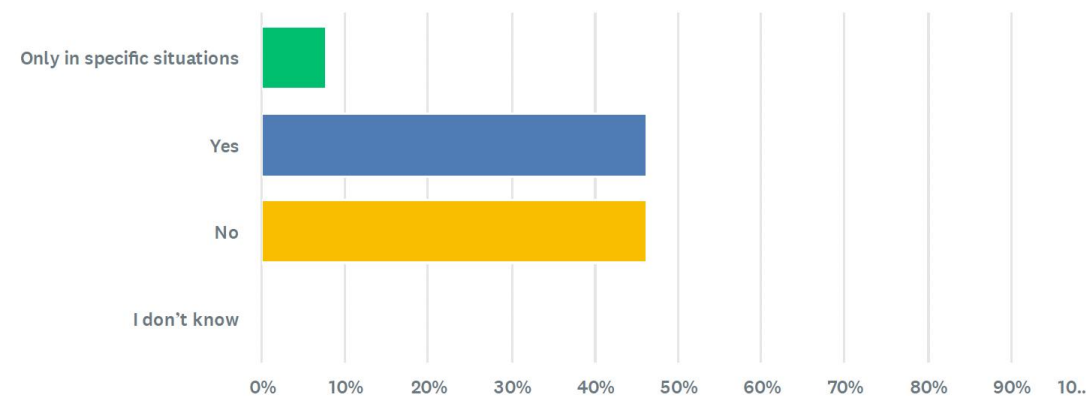
Q2 Are public security forces (e.g. police) allowed to wear body-worn cameras in publicly accessible spaces?

Answered: 13 Skipped: 0



Q3 Are private security officers allowed to wear body-worn cameras in publicly accessible spaces?

Answered: 13 Skipped: 0



Note: Specific situation refers to “strict requirements regarding activation, purpose, and data protection.”



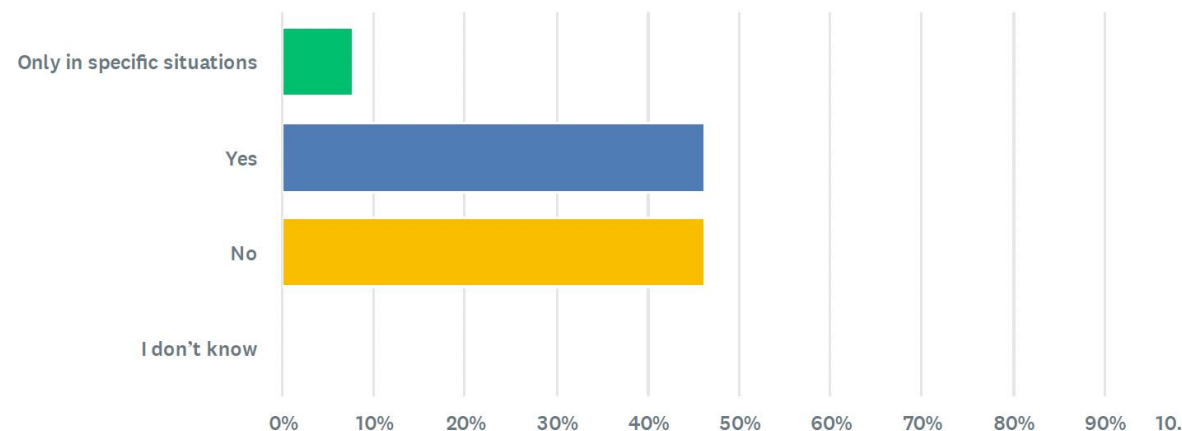
Status for private security in 13 countries

Allowed

- Netherlands
- Germany
- Sweden
- Finland
- United Kingdom

Q3 Are private security officers allowed to wear body-worn cameras in publicly accessible spaces?

Answered: 13 Skipped: 0



Not currently allowed

- Belgium
- France
- Portugal
- Slovenia
- Croatia
- Switzerland

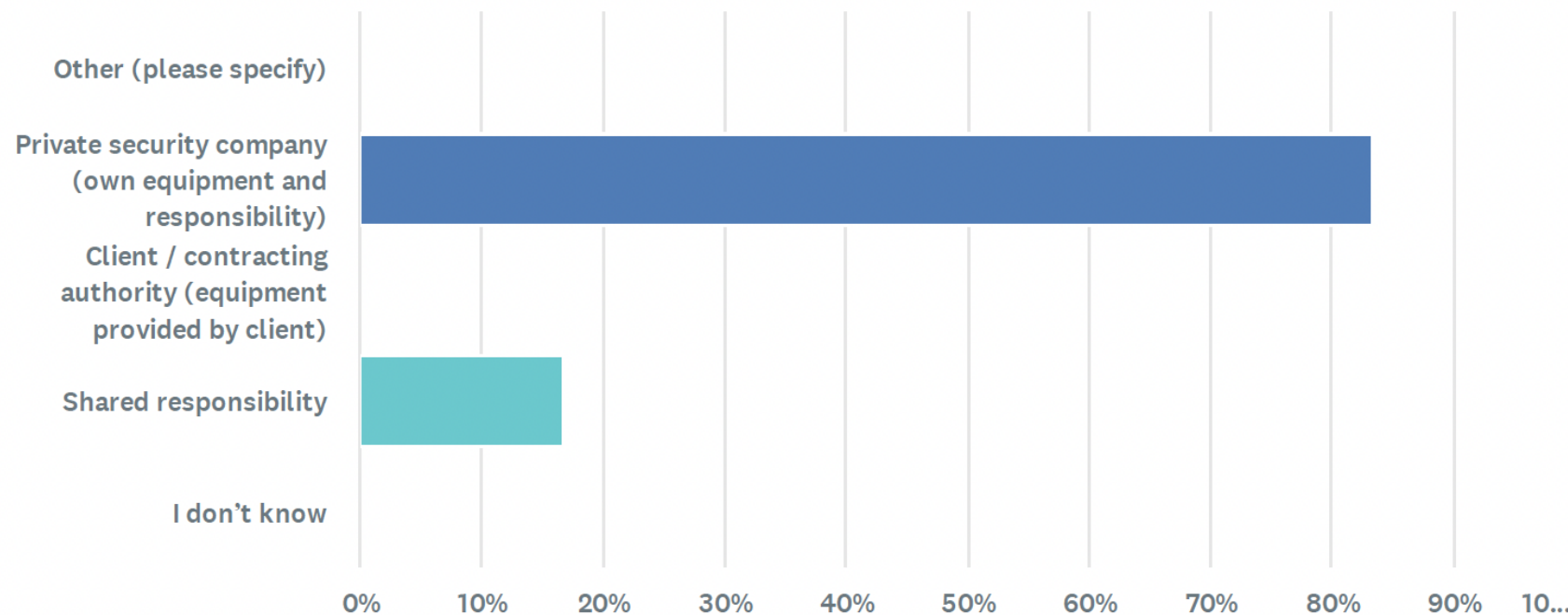
Grey area:

Estonia => not explicitly banned but considered not allowed given GDPR interpretation



Q5 Under whose responsibility are body-worn cameras deployed and audiovisual recordings processed?

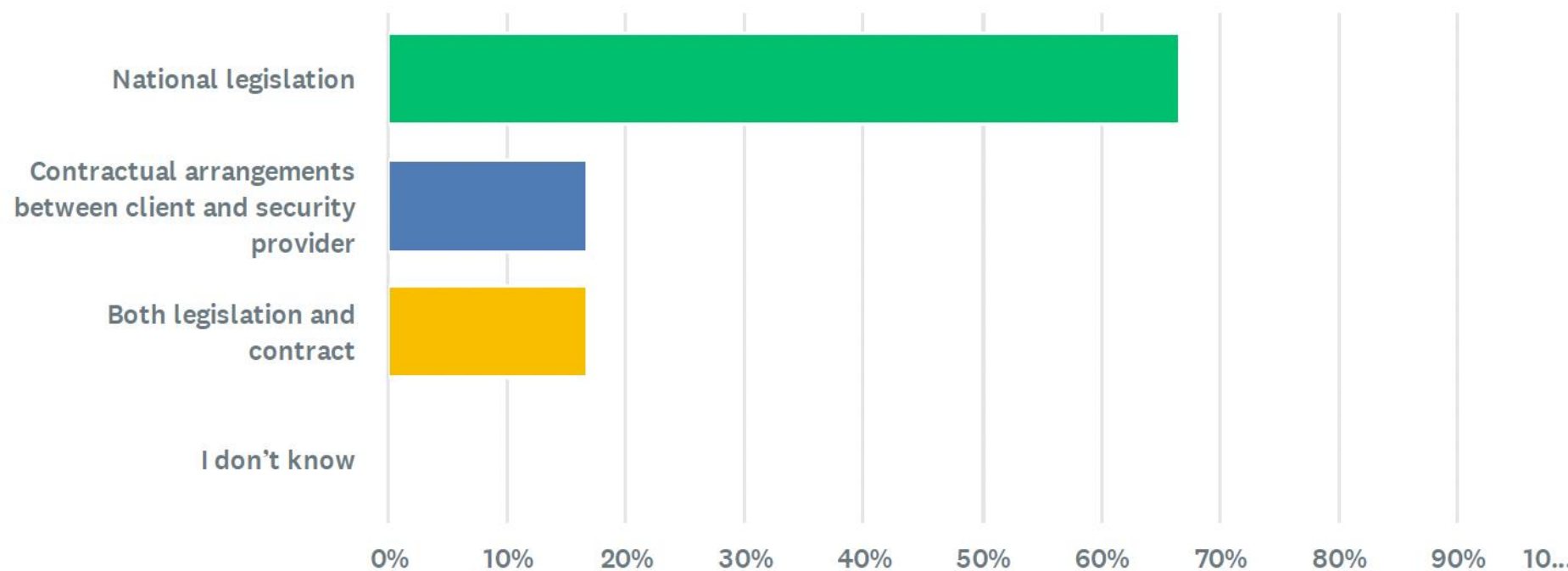
Answered: 6 Skipped: 7





Q6 Is the use of body-worn cameras by private security primarily regulated by:

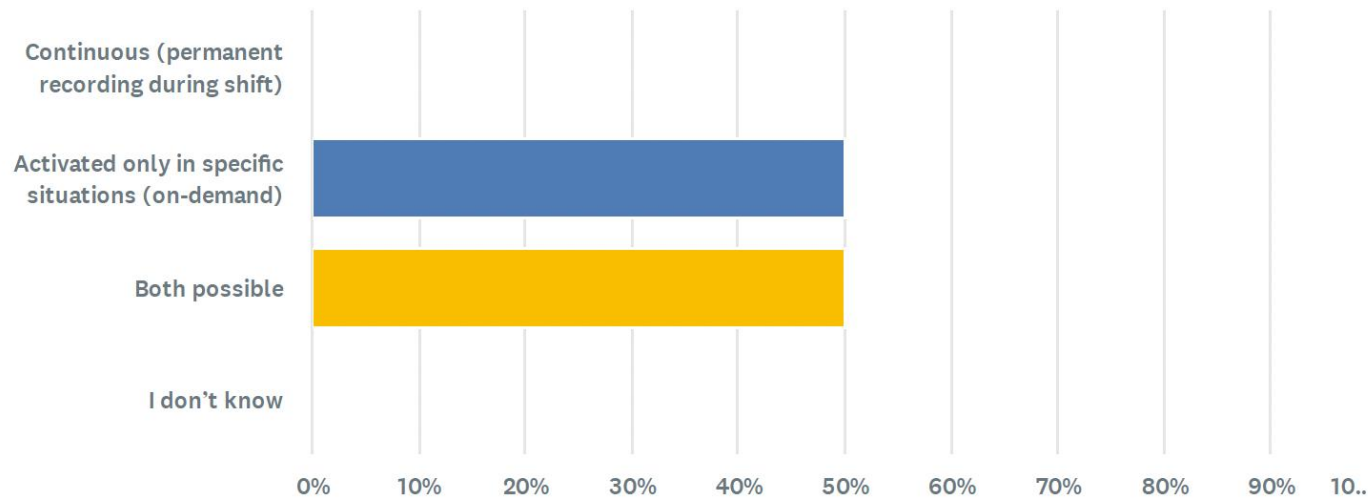
Answered: 6 Skipped: 7





Q7 How are recordings made?

Answered: 6 Skipped: 7



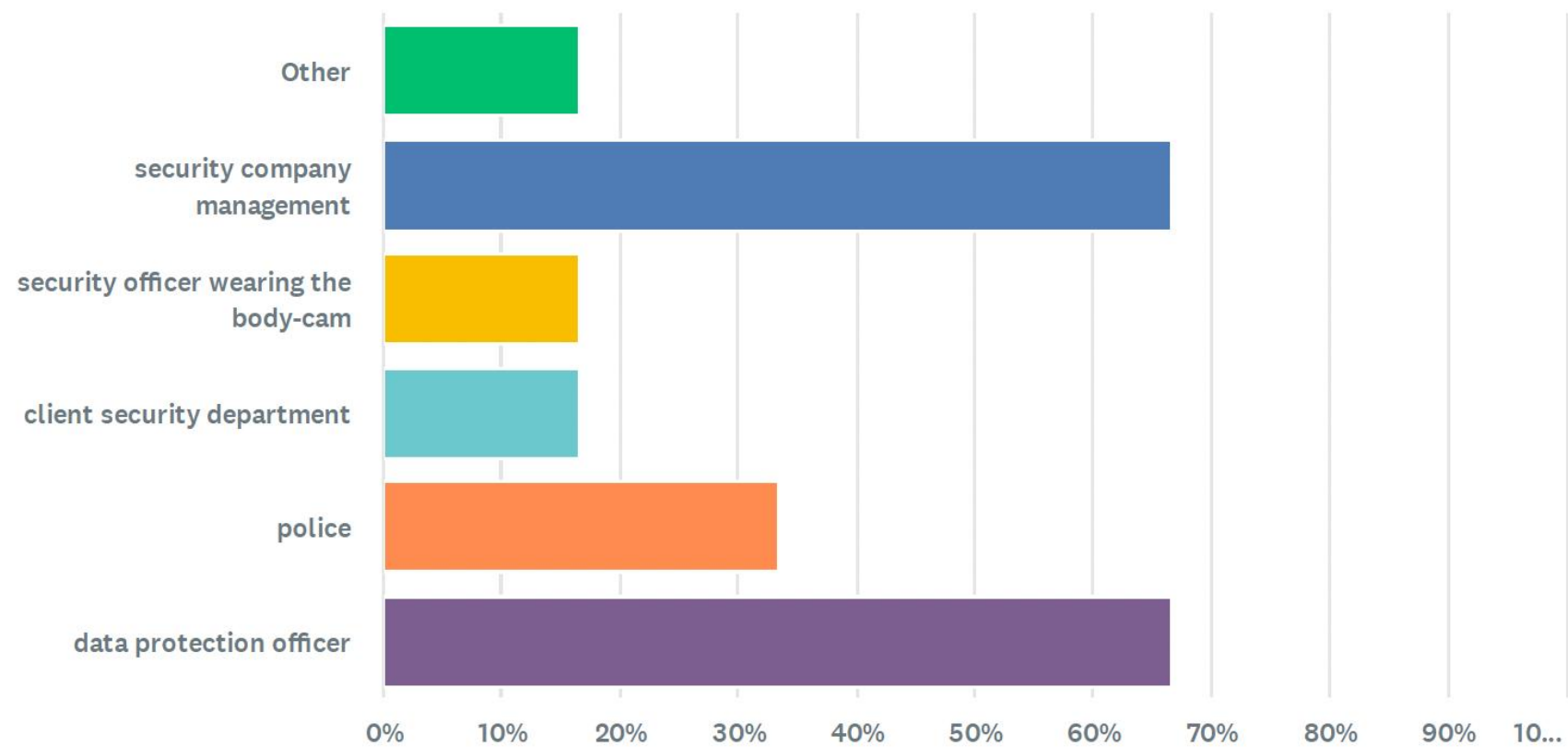
• **On-demand recording (not continuous) => Usage is reactive, not permanent.**

• **Why?**

- **Proportionality (GDPR)**
- **Avoid over-surveillance**

Q8 Who is allowed to access the recordings?

Answered: 6 Skipped: 7





Main transparency requirements

- **Netherlands:** Not clearly specified
- **Romania:**
 - Legitimate interest required
 - Visible signage + marking on camera
- **Germany:**
 - Cameras must be visible
 - Prior or real-time notification that recording is taking place
 - No filming in sensitive areas (e.g. restrooms, changing rooms, break rooms)
- **Sweden:**
 - None specified
- **Finland:**
 - Obligation to inform (staff + purpose of surveillance)
- **United Kingdom:**
 - Clear signage
 - Visible cameras
 - Verbal notification where appropriate
 - Accessible privacy information

A few take-aways

- As in other areas, the landscape is fragmented
- GDPR and interpretation of it dictate limitations
- Future widening of the use?

- Comments / questions?



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Results of the European survey on missions entrusted to private security

November 2025





✓ Missions already widespread (adopted by >40% of responding countries)

- **Surveillance / access control / reception in public or sensitive buildings**
 - Public administrative buildings (national / international): 11 countries out of 12 (90%)
 - Embassies: 13/15 (87%)
 - Police and gendarmerie stations: 7/15 (47%)
 - Close protection at the request of public authorities: 10/15 (67%)
 - Courts (access/security outside courtrooms): 8/15 (53%)
 - Prisons and administrative detention centres: 7/15 (47%)
- **Technological missions:**
 - Real-time monitoring of CCTV in privately owned publicly accessible places (concerts, shopping centres, etc): 13/15 (87%)
 - Number plate recognition (algorithmic video surveillance): 10/15 (67%)
 - Handling medical assistance calls for vulnerable persons via connected devices: 9/15 (60%)
- **Specific missions:**
 - Vehicle boot checks: 8/15 (53%)
 - Alarm response or municipal patrols: 9/15 - (60%)



⊘ Missions still rare or absent (≤ 5 countries out of 15)

- **Highly sensitive or public authority missions:**
 - Transfer of detainees for medical reasons: 3/15 (20%)
 - Guarding of hospitalised detainees: 3/15 (20%)
 - Emergency calls 112 / 999 : 2/15 (13%)
 - Supervision of runaway or placed minors: 1/15 (7%)
- **Technological missions:**
 - Real-time monitoring of CCTV in public spaces on behalf of public authorities: 5/15 (33%)
- **Advanced algorithmic surveillance:**
 - Facial recognition: 4/15 (often limited to private spaces) - (27%)
 - Detection of suspicious behaviour (AI): 5/15 - (33%)
- **Authority-type or judicial missions**
 - Assistance to bailiffs outside courts: 2/15 (13%)
 - Supervision and management of seized assets: 3/15 (20%)
 - Body-worn cameras on officers: 4/15 (27%)



National Diversity

Some countries reported specific cases

- **Netherlands:** Broad range of missions including body-worn cameras, public video protection, and municipal tasks via special officers "BOA"
- **Spain** (regions such as Catalonia and the Basque Country): presence of private security in police stations
- **Belgium:** numerous restrictions, but political ambition currently under discussion



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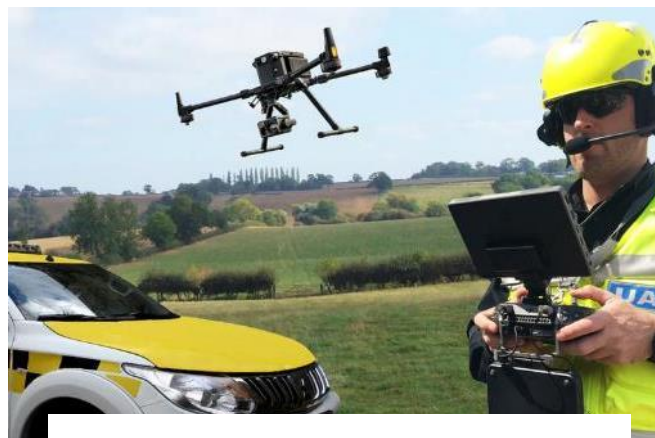
Drones and Counter-drone security

EU Action Plan and CoESS activities





The role of drones in private security services



Use of drones



C-UAS



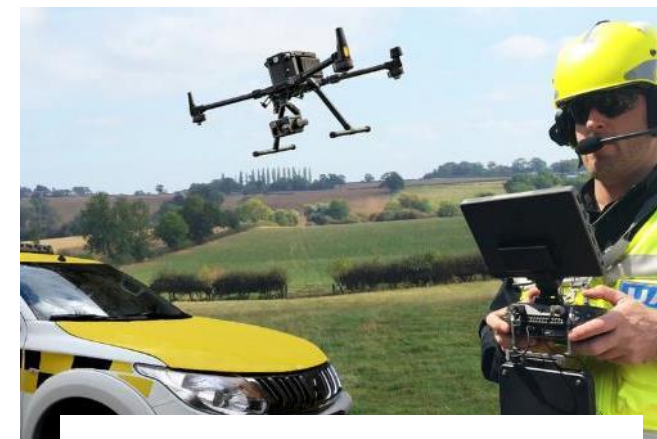
The regulation of private security services is a Member State competency !



Use of drones

Challenges of PSCs to deploy drones

1. Lengthy authorization procedures
CoESS : proposal of two new Standard Scenarios.
2. Lack of technical knowledge along the stakeholder chain.
CoESS : Investments in upskilling of personnel at authorities and users.
3. Lack of standards and norms.
CoESS : speed up the process.



Use of drones





EU Action Plan to promote use of drones

The European Commission has published in February 2026 its new [EU Action Plan on Drones and Counter-Drone Security](#) with new initiatives to enhance deployment of drones :



1. Regulatory simplification measures for the use of drones, likely including new Standard Scenarios.
2. Drone Security Package, incl. new security and safety requirements for operators of >100g drones (geo-awareness, registration and remote ID), better roll-out of U-Space, and EU Trusted Drone Label.

CoESS will continue to promote its two new Standard Scenarios. Is there anything else we should address?



Counter-drone security



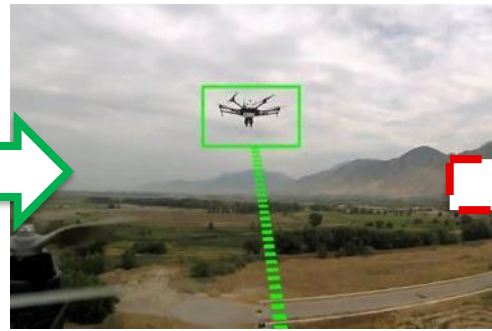
Challenges of PSCs in C-UAS

Simplified C-UAS security chain

VERY LITTLE REACTION TIME !



prevention



detection



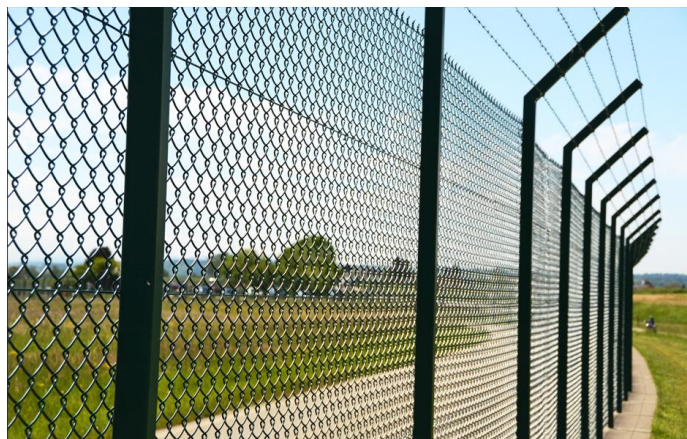
verification



intervention



Reported legal situation on perimeter protection



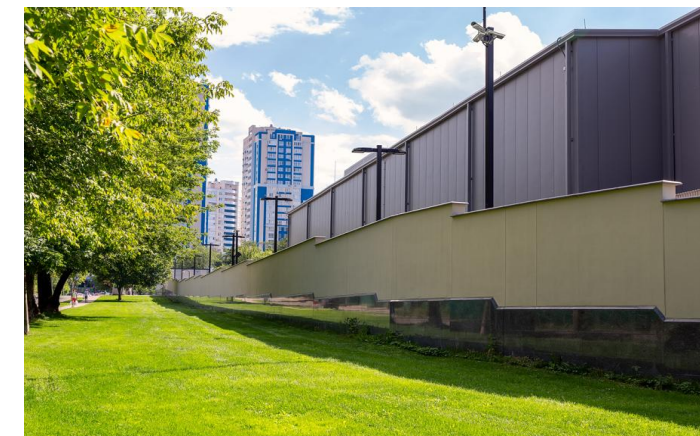
Military perimeters:

Often protected by defence forces or on their behalf.



No fly zones:

Often small perimeter and uncertainty of responsibilities among public actors.



Private perimeters:

Right for access control limited to the ground area.



Clarify responsibilities, incl. review of private security competencies



Include airspace in regulation of private perimeter protection

Our recommendations

1. **EU legal C-UAS framework to:**
 - Enforce no-fly zones in practice to protect CI and public spaces effectively.
 - Legal certainty for the protection of private property.
2. **IF security companies shall support law enforcement with C-UAS services beyond detection, legal frameworks are required at national level, incl.:**
 - Framework for quality control of companies and security workers.
 - Evaluation of liability rules, criminal and civil law, GDPR.
 - Framework for PPPs in C-UAS and clear SOPs.

After yearlong lobbying activities on this matter, the European Commission now announced a legal framework at EU-level by 2030, incl. on roles and responsibilities. CoESS will continue its activities in the framework of this new initiative.





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Standards: EN 17483 System





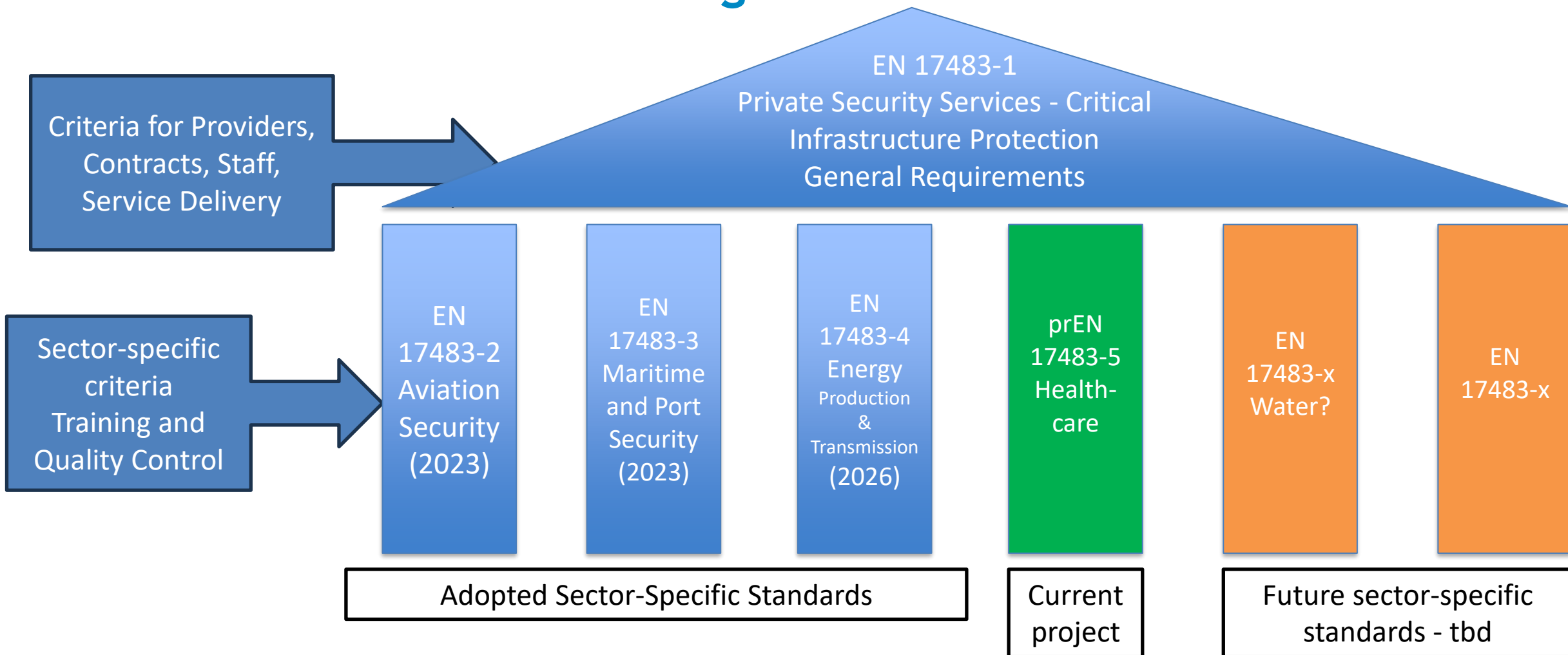
Standards: the Link Between Policy and Practice

- Developed by stakeholders = legitimacy
- Help CI operators identify quality suppliers
- Operational requirements made visible





EN 17483: Professionalising CI Protection





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Tackling Labour Shortages

Findings of the INTEL Project





Conclusion of the INTEL Project

www.securityskills.eu



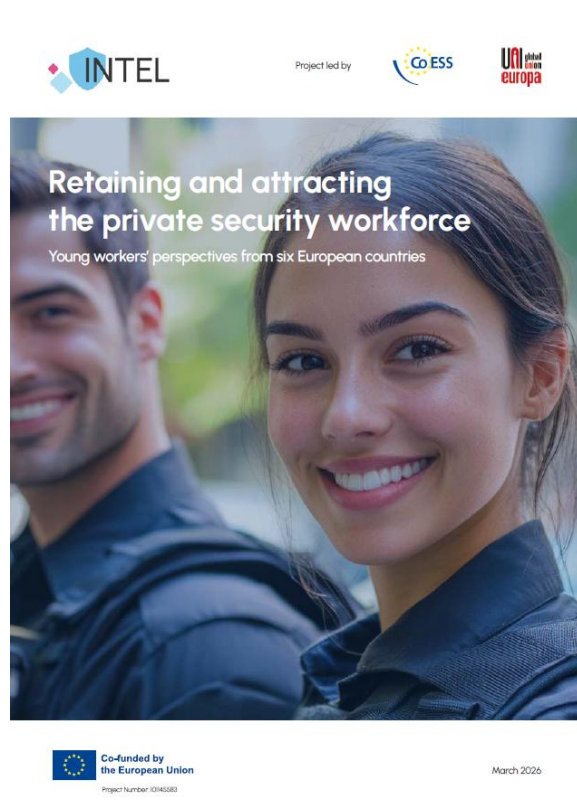
Co-funded by the European Union
Support for Social Dialogue

Project number: 101145583



Deliverable 1: Perception studies

Our goal was to help Social Partners better understand how the sector can become more attractive for young workers in the industry.



- Perception studies were conducted and published in six partner countries (BE, CRO, DE, IT, NL, ROM).
- +2000 workers were interviewed.
- Results are nationally-biased, but build basis for EU-level report.

10 key take-aways



Economic security matters most



Expectations for work-life balance matter for retention



Job security is a strength of the sector



Onboarding: managing and meeting expectations is important

10 key take-aways



Human factor is key: DEI & people management



Outreach to young people can be broadened



Recruitment & image campaigns for better understanding

10 key take-aways



Career paths need to be clear and visible



Training works, but needs regular updating



Social Dialogue and public procurement shape attractiveness

Deliverable 2 : Report on training systems & curricula

CoESS collected extensive data on basic and specific training systems, incl. their curricula and regulation, in 26 European countries, with the goals to:



- Establish first Europe-wide compilation of training systems to enable peer learning.
- Identification of quality factors and good practices.

Quality criteria

All countries meet at least one out of three quality criteria for basic training – in some countries thanks to Social Partner initiatives.

1. **Regulation and licensing** are present in almost all countries.
2. **VET framework organisation** is well-established and mandatory in most countries, with Social Partners having developed voluntary VET schemes in Austria, Germany, Denmark, Luxemburg and Spain.
3. **Active Social Partner involvement** is widespread but deserves further promotion to further align training frameworks with operational realities, market developments and workers demands.

Other findings

Basic training

- **Duration:** varies from 20h to 1 year.
- **Social Partner role** in curriculum development and updates remains limited.
- Only few Social Partners run **mentoring** initiatives for disadvantaged groups.
- 50% see need to **improve basic training** (curricula, public funding, mentoring).

Additional training

- **Very high diversity** of systems, organisation, set-up – **SP role more limited, often regulated in VET.**
- Almost everywhere recognised partly or fully as **working time.**
- **Focus more on soft than IT-skills.** IT-micro credentials on AI etc. are rare. 82% see need for improvement.
- Often lack of data on participation rates – public procurement is a problem for more upskilling.



[Securityskills.eu](https://www.securityskills.eu)



Insider Threat Webinar - Proposed content

- **Insider Threat Prevention and Mitigation**
 - Principles according to the project coordinated by CoESS (2017-2018) and deliverable www.help2protect.info
 - Examples of Insider Threat cases and lessons learned
 - What does EU legislation say? EU, Aviation, CER
 - What do standards say?
- **Best practices identified by members?**
- **Special requests?**
- **Suggestions for presenters or recommended speakers?**



Pre-conference workshop on Behaviour Detection at Behavioural Analysis 2026 - 15 September, Krakow

- **Designed as a Behaviour Detection 101 Gateway**
 - provide operational context, shared terminology and cross-sector perspectives,
 - particular focus on how lessons learned in airport security can be transposed to maritime, port and comparable environments.
- **Also addresses challenges such as insider risk and insider threat**
 - how behaviour detection can support early identification of compromised or coerced personnel.
- **BA 2026 Conference participants get 50% rate for the workshop**





Behaviour Detection 101: From Airport Security to Ports and Critical Infrastructure

A Pre-Conference Practitioner Workshop powered by CoESS & ASSA-i

INTRODUCTION

PROGRAMME

REGISTRATION

Objective

To introduce and contextualise Behaviour Detection as a **foundational professional competency** for security practitioners in ports, transport hubs and critical infrastructure, and to demonstrate how operational lessons learned in **airport security** can be transposed to **maritime, port and comparable environments**.

The workshop is designed as a **gateway to the in-depth methodologies**, research and operational practices explored during the **Behavioural Analysis Conference**.

Time & Location

The workshop will take place at the Qubus Hotel from 1300-1700 on Tuesday 15 September 2026.

Who can attend?

Participation is open to all.

A preferential rate is available for Behavioural Analysis 2026 participants.

<https://behaviouralanalysis.com/pre-conference-workshop/#registration>

- Conference supported by CoESS / ASSA-I
- Speakers from business, law enforcement and academia
- Looks at BA in different settings, AI and the role of technology, concerning behaviour in the workplace

[CALL FOR PAPERS](#)[REGISTER NOW](#)

A 3-day conference presenting examples of operational best practice, alongside the latest academic research, exploring how negative intent and potential security threats can be identified through...

- behavioural observation;
- human intuition; and,
- investigative interviewing.



Private Security 90' session at CIPRE (tbc)

- CoESS/ASSA-I longtime supporters
- Special session for private security before the “bigger” event
 - Not very practical because comes immediately after our AGM - but focus is on CIP
- Agenda up to us
- Confirmation and more information to come

critical 
infrastructure
PROTECTION AND
RESILIENCE EUROPE

20th-22nd OCTOBER 2026

BRUSSELS, BELGIUM

OSCE Project on CIP - PROTECT

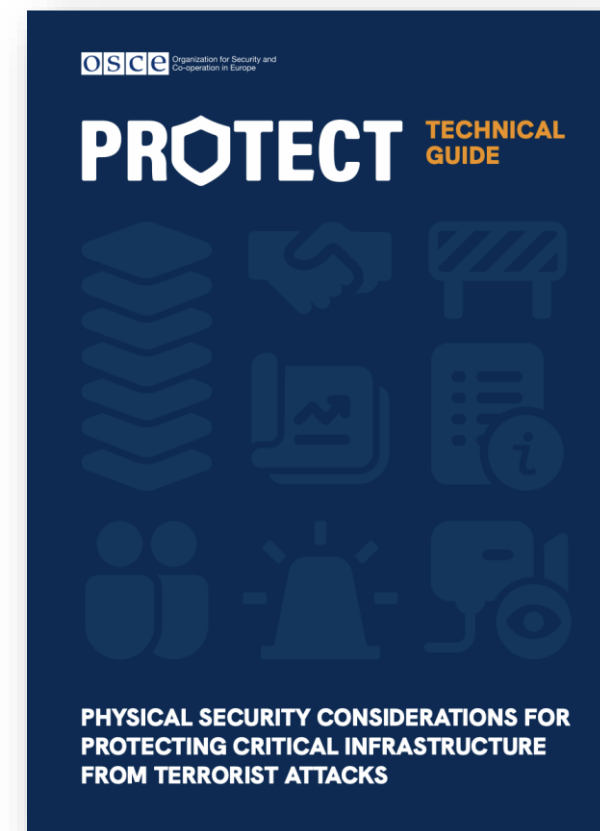
- Project PROTECT – Technical Guide on Physical Security Considerations for Protecting Critical Infrastructure from Terrorist Attacks
- CoESS part of the Expert Advisory Group (C Piana)

WHAT IS IN THE GUIDE?



Chapter

- 1 Introduction
- 2 Strategic and Legal Frameworks for Critical Infrastructure Protection
- 3 Human Rights Considerations
- 4 Public-Private Partnerships
- 5 Terrorism Threat and Risk Assessment
- 6 Physical Security Measures
- 7 Security Planning and Target Hardening
- 8 Insider Threat Management
- 9 Training and Exercising
- 10 Enhanced Threat Escalation Options





Closing and feedback from participants about the upcoming activities

=> Interest for webinars, in-person meetings, visits, etc.