

The security and safety sector in the light of new trends

Research conclusions

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A cross-sectional study of the security and safety sector for property and persons was carried out on behalf of the Technical Property Protection Development Institute TECHOM (hereinafter: TECHOM) in August and September 2024. They resulted in the creation, by a team of researchers from MABEA sp. z o.o.: Anna Araminowicz, Piotr Klatta, Tomasz Radochoński i Magda Sierżyńska, of the first comprehensive report entitled *Protection and Security of Property and Persons – analysis of the sector. Survey report*, which takes into account the broad legal and normative context and the specificities of the sector. It is a free report intended for general use. Its first edition was published for internal use in October 2024¹. The second edition, expanded to include the latest statistics, was published in March 2025 on the TECHOM website².

¹ A. Araminowicz, P. Klatta, T. Radochoński, M. Sierżyńska, *Ochrona i Bezpieczeństwo Mienia i Osób – analiza sektora. Raport z badania* (Eng. Protection and Security of Property and Persons – analysis of the sector. Survey report), Kraków 2024, MABEA sp. z o.o., https://www.mabea.pl/wp-content/uploads/2024/11/Ochrona-i-bezpieczenstwo-mienia-i-osob-analiza-sektora.Raport-z-badania2024_do-pobrania.pdf [accessed: 28 II 2025].

² A. Araminowicz, P. Klatta, T. Radochoński, M. Sierżyńska, *Ochrona i Bezpieczeństwo Mienia i Osób – analiza sektora. Raport z badania. Wydanie II zaktualizowane* (Eng. Protection

The research was inspired by information provided in July 2024 by the Polish Agency for Enterprise Development (PARP) about a competition to entrust the organisation and operation of sectoral competence councils – bodies defined in Article 4c(1) point 2 of the Act on the establishment of the Polish Agency for Enterprise Development³. Sectoral competence councils serve to build cooperation between public administration, educational institutions and business organisations and bring together representatives of these sectors. They play important role in the labour market by supporting adult education. A sectoral competence council has been set up, among others, in the security and safety of property and persons sector (name proposed by PARP).

The idea of setting up sectoral councils arose from the trend in the EU towards a unified understanding of competences and qualifications. Already the Lisbon Convention on the Recognition of Qualifications, as an international agreement under the auspices of UNESCO and the Council of Europe, has enabled the recognition of academic qualifications in Europe and beyond⁴. Mention should also be made of Directive 2005/36/WE⁵, which deals with the recognition of professional qualifications within the EU and enables professionals to practise their profession or provide services abroad. This Directive formed the basis for the introduction in 2008 of the European Qualifications Framework (EQF), which was subsequently amended in 2017⁶. According to the Recommendation of the Council of Europe on promoting automatic mutual recognition of higher and upper secondary education and training qualifications and the outcomes of learning periods abroad, the EQF is supposed to promote transparency of national education and training systems and build mutual trust. Sectoral councils according

and Security of Property and Persons – analysis of the sector. Survey report. Second updated edition), Kraków 2025, MABEA sp. z o.o., https://www.techom.com/wp-content/uploads/2025/04/Raport_MABEA_TECHOM_2025.pdf [accessed: 21 V 2025].

³ *Act of 9 November 2000 on the establishment of the Polish Agency for Enterprise Development* (consolidated text, Journal of Laws of 2025, item 98).

⁴ *Convention on the Recognition of Qualifications concerning Higher Education in the European Region, drawn up in Lisbon on 11 April 1997* (Journal of Laws of 2004, no. 233, item 2339).

⁵ *Directive 2005/36/EC of the European Parliament and of the Council of 7 September 2005 on the recognition of professional qualifications* (Official Journal of the EU L 255/22 of 30 IX 2005).

⁶ *Council Recommendation of 26 November 2018 on promoting automatic mutual recognition of higher education and upper secondary education and training qualifications and the outcomes of learning periods abroad* (Official Journal of the EU C 444/1 of 10 XII 2018).

to the Act on the Integrated Qualifications System⁷ play a fundamental role in the supervision of the Polish Qualifications Framework (i.e. the Polish implementation of the EQF) for individual sectors.

The legal basis for the operation of sectoral councils is defined by:

- 1) Act of on the establishment of the Polish Agency for Enterprise Development,
- 2) Act on the Integrated Qualifications System,
- 3) Act – Education Law⁸.

Moreover, in the draft amendment to the Act on crisis management⁹, the sector competence council in the security and safety sector is indicated as the body issuing opinions on certificates or other documents requested by critical infrastructure (CI) operators when implementing organisational and technical solutions to ensure the security of the CI they manage and increase its resilience.

The competition application to organise and run a council in this sector, submitted by TECHOM in cooperation with the Polish Platform for Homeland Security, the Polish Association for National Security and the POLALARM National Association of Engineers and Technicians of Technical Security and Security Management (hereinafter: POLALARM), received a positive opinion from the President of PARP. This great accolade creates opportunities for action on many levels, facilitated by the specific location of sectoral competence councils in the private-public ecosystem.

The following is a synthetic presentation of the report, which takes into account a variety of data, including statistics.

Security and safety of property and persons sector – discussion of the survey results

Security and safety of property and persons sector plays a special role in ensuring the stability of the state and its importance is constantly growing in the face of new technological, regulatory and geopolitical challenges.

⁷ *Act of 22 December 2015 on the Integrated Qualifications System* (Journal of Laws of 2024, item 1606).

⁸ *Act of 15 December 2016 – Education Law* (consolidated text, Journal of Laws of 2024, item 737, as amended).

⁹ Draft Act amending the Act on crisis management and certain other acts, <https://legislacja.rcl.gov.pl/docs//2/12386961/13069020/13069024/dokument711601.pdf> [accessed: 4 IV 2025].

Today's threats require new legislative and organisational solutions, more effective security methods and – above all – qualified personnel capable of countering both traditional and new forms of threats, including cybercrime or hybrid threats.

The authors of the report focused on three key aspects of the sector:

1. Structure and regulations – analysis of the legal and normative context, taking into account the specific characteristics of the sector.
2. Competency needs – identification of skill gaps in the workforce and recommendations for training and skills validation.
3. New challenges and technologies – discussion of geopolitical, legislative and technological trends that will shape the future of the sector.

The research carried out was aimed at comprehensively diagnosing the current situation in the sector, identifying of the most important problems and directions for development that will allow security services to be better adapted to contemporary realities.

Research methodology and scope of analysis

The research on the security and safety of property and persons sector was conducted in August and September 2024. The objectives of this research were:

- analysis of the socio-economic and institutional-legal environment of the security and safety of property and persons sector,
- analysis of the educational and training offer for the needs of the sector,
- analysis of trends influencing the labour market and competence needs in the sector,
- identification of competence needs in the sector,
- identification of challenges facing the sector in the context of actions aimed at ensuring personnel with competences adequate to the needs of the labour market in the sector¹⁰.

The research included both existing data analysis, a qualitative study and a survey research.

¹⁰ A. Araminowicz, P. Klatta, T. Radochoński, M. Sierżyńska, *Ochrona i Bezpieczeństwo Mienia i Osób – analiza sektora. Raport z badania* (Eng. Protection and Security of Property and Persons – analysis of the sector. Survey report), Kraków 2024..., p. 8.

As part of the analysis of the existing data, the following were taken into account:

- legal acts regulating activities in the sector,
- statistical data,
- reports and analyses concerning the sector,
- scientific articles,
- articles in printed and electronic media and press releases,
- information posted on the websites of entities (e.g. institutions regulating the sector, sector organisations, universities),
- information posted on sector portals¹¹.

The qualitative study was an important complement to the analysis of the existing data and allowed the specifics of the sector to be recognised. It was carried out in the form of two focus group interviews and an expert panel. A total of 29 people took part in the survey, including respected experts from public administration (market regulators), professional associations and chambers, universities, specialised continuing education institutions, as well as representatives of entrepreneurs, both those who operate in the sector (security agencies, companies designing and installing security systems) and those who procure security services (inter alia in the areas of CI, trade, logistics).

The questionnaire survey was conducted using the CAWI (Computer-Assisted Web Interview) method on a group of 46 respondents representing, among others, companies providing security services, principals and users of security services, professional organisations, educational institutions, public administration¹².

Based on the data collected, scenarios were drawn up for the development of the sector, taking into account the impact of new regulations, technological developments and the changing needs of the labour market. The research methodology allowed for a multidimensional analysis of the sector and the integration of regulatory, business and educational perspectives.

Characteristics of the sector

The sector of security and safety of property and persons started to develop intensively in Poland after the political transformation in 1989. It very

¹¹ Ibid., p. 9.

¹² Ibid., p. 11.

quickly gained great importance in the free market economy. The first piece of legislation that made it possible to operate in the sector was the Act on economic activity¹³. It regulated the need to obtain a licence for services in the area of security of persons and property, as well as detective services. The foundation of the sector's operation is the Act on the protection of persons and property¹⁴. For almost a decade the sector functioned without proper regulation, which generated numerous legal ambiguities. Today, it is subject to a number of additional regulations, but a significant proportion of security services operate outside the legal framework, as there are no requirements for service providers operating outside the framework set by the Act on the protection of persons and property. This sector-specific phenomenon has practical implications for the entire security services market. It poses both strictly legislative and bottom-up challenges, resulting from dynamic market changes and growing expectations of security personnel. It requires them to adapt to new technologies and acquire specialised competences, including security management, performing complex tasks in risk-based structures or crisis management. In view of the growing role of CI protection, security agencies and other companies at the core of the sector have to meet increasingly demanding standards, which is not only a regulatory challenge, but also educational and competence verification challenge.

The definition of the sector for the purposes of the report – in accordance with PARP guidelines – was based on Polish Classification of Activities (PKD) codes. Selected subclasses are presented in the Table 1¹⁵.

¹³ *Act of 23 December 1988 on economic activity* (Journal of Laws of 1988, no. 41, item 324, as amended).

¹⁴ *Act of 22 August 1997 on the protection of persons and property* (Journal of Laws of 2025, item 532).

¹⁵ All tables and graphs in this article are taken from the publication: A. Araminowicz, P. Klatta, T. Radochoński, M. Sierżyńska, *Ochrona i Bezpieczeństwo Mienia i Osób – analiza sektora. Raport z badania*, Kraków 2024... (editor's note).

Table 1. Description of selected subclasses of the Polish Classification of Activities 2007.

Subclass	Subclass includes
74.90.Z – Other professional, scientific and technical activities not elsewhere classified	<ul style="list-style-type: none"> • business intermediation, i.e. organising procurement or sales for small and medium-sized businesses, excluding real estate intermediation, brokering the purchase or sale of patents, valuation activities, excluding real estate valuation and valuation for insurance companies (antiques, jewellery, etc.), inspection of transport documents, information on freight rates, weather forecasting activities, • safety advisory services, • activities of agronomists and agricultural economists, environmental consultancy, other technical consultancy, consultancy other than architectural or engineering consultancy and management consultancy, costing activities, activities of agents or agencies acting on behalf of individuals for the purpose of engaging in film, theatre and other artistic or sporting activities, publishing of books, musical recordings, play scripts, artistic works and photographs by publishers, producers, etc.
80.10.Z – Other professional, scientific and technical activities not elsewhere classified	<ul style="list-style-type: none"> • carrying out security and patrolling activities, security activities related to the transport of money, securities or other valuables, • security activities in armoured car transport, • personal protection service activities, • lie detector service activities, • fingerprinting and identification service activities, • other security activities, excluding the operation of security systems
80.20.Z – Security activities, excluding security systems service activities	<ul style="list-style-type: none"> • security activities relating to the operation and monitoring of electronic security systems, such as burglar or fire alarms, including their installation and maintenance, • installation, repair, conversion and adjustment of mechanical or electronic locking devices, safes and vaults in connection with subsequent monitoring. Units carrying out this activity may also sell the above equipment, i.e. electronic security systems, mechanical or electronic locking devices, safes and vaults
80.30.Z – Security systems service activities	<ul style="list-style-type: none"> • investigative and detective activities, • the activities of private investigators, irrespective of the type of client or the purpose of the investigation

The descriptions of PKDs correspond to the way the security system for CI is understood. Within the framework of the National Critical Infrastructure Protection Program (NPOIK), there is a so-called six-pack

describing the security system for CI. Measures taken to ensure security include:

- 1) providing physical security, including technical measures to support physical protection,
- 2) providing technical security, including fire protection,
- 3) providing personal security,
- 4) providing information and communication security,
- 5) providing legal security,
- 6) business continuity and recovery plans¹⁶.

The structure of the sector is highly diversified. Micro, small and medium-sized companies providing physical security services dominate, but companies specialising in technical security systems are playing an increasingly important role (the use of new technologies based on artificial intelligence is also gaining popularity). Large security corporations, most of which are international in scope, are also important.

According to data from the REGON register (as at June 2024), there were 7595 entities registered in the sector, declaring their activities within the scope of PKD 80 division – Investigation and security activities¹⁷. Table 2 presents the number of these entities between 2015 and 2024, by the number of people employed in the entity.

Table 2. Number of entities in 2015–2024 declaring to conduct investigation and security activities, by number of employees (based on data from REGON register).

As at	0–9	10–49	50–249	250+	total
31.12.2015	4 822	734	288	112	5 956
31.12.2016	5 259	732	275	116	6 382
31.12.2017	5 482	741	265	115	6 603
31.12.2018	5 546	697	247	113	6 603

¹⁶ *National Critical Infrastructure Protection Program*, Government Centre for Security (RCB), 2023. The text of the program is available at: <https://www.gov.pl/web/rcb/narodowyprogram-ochrony-infrastruktury-krytycznej>.

¹⁷ A. Araminowicz, P. Klatta, T. Radochoński, M. Sierżyńska, *Ochrona i Bezpieczeństwo Mienia i Osób – analiza sektora. Raport z badania*, Kraków 2024..., p. 51.

As at	0–9	10–49	50–249	250+	total
31.12.2019	5 656	663	247	112	6 678
31.12.2020	5 913	637	240	112	6 902
31.12.2021	6 173	620	234	109	7 136
31.12.2022	6 410	606	228	107	7 351
31.12.2023	6 529	583	228	105	7 445
30.06.2024	6 690	578	223	104	7 595

Chart 1 shows the distribution of entities declaring to carry out investigation and security activities, taking into account the subclasses of the PKD 80 division.

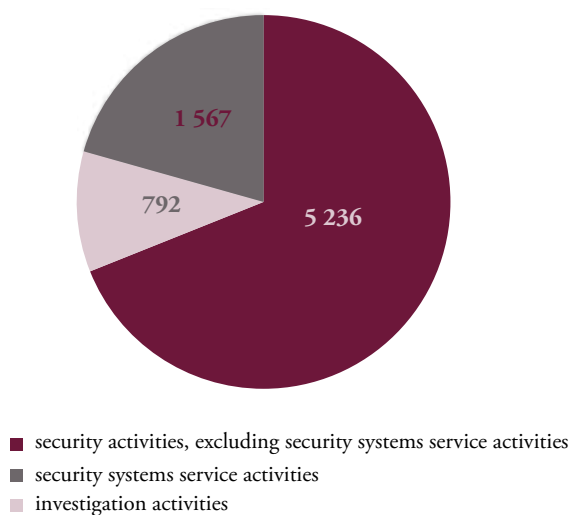


Chart 1. Number of entities declaring activities in the security and safety sector in 2024, by subclass of PKD 80 division (based on data from the REGON register).

According to data from Statistics Poland (GUS) on employment within the PKD 80 division, the sector employs 117 743 employees (as at 31 March

2024)¹⁸. A decline in employment in the sector between 2021–2024 is evident (Chart 2). This may be a consequence of the COVID-19 pandemic, the full-scale Russian invasion on Ukraine, as well as new trends expressed in the shift away from direct physical protection to technical security.

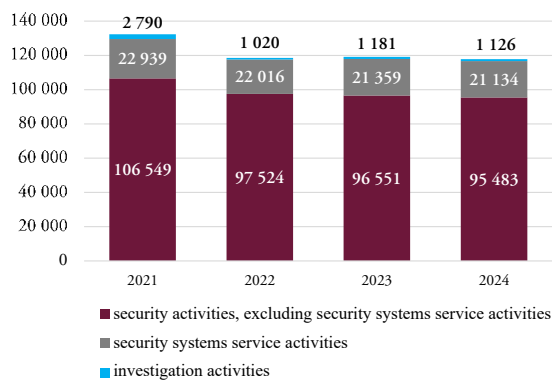


Chart 2. Number of people employed in the security and safety sector in 2021–2024, including a division into subclasses of PKD 80 division (based on Statistics Poland data).

The value of the market for the protection and security of property and persons in 2023 was estimated at approx. PLN 16 billion, the largest part of which – more than PLN 11,7 billion – was made up of revenue from security activities, excluding the operation of security systems (PKD 80.10.Z division)¹⁹.

Entitlements and qualifications

Much of professional activity in the security and safety of property and persons sector is subject to outdated regulations that are out of step with modern realities and are largely concessionary in nature – in practice omitting the competence acquisition stage. They also do not take into account the real validation of competences.

¹⁸ Ibid., p. 59.

¹⁹ Ibid., p. 46.

The basic legal act that regulates this subject is the Act on the protection of persons and property. The issue of admission to the possession of weapons is in turn regulated by the Act on weapons and ammunition²⁰.

Table 3 presents the number of persons enrolled on the lists of qualified sector employees between 2015 and 2023, who are qualified in accordance with the Act on the protection of persons and property.

Table 3. Number of people on the lists of qualified sector personnel between 2015 and 2023 (based on the Police HQ data).

State at the day	List of persons on the list of qualified physical security officers	List of persons on the list of qualified technical security personnel
31.12.2015	90 059	17 405
31.12.2016	91 230	18 066
31.12.2017	92 943	18 633
31.12.2018	95 238	19 212
31.12.2019	95 413	19 644
31.12.2020	99 235	20 137
31.12.2021	103 323	20 801
31.12.2022	108 261	21 338
31.12.2023	112 459	22 039

A very good example showing the obsolescence of the mentioned regulations in the context of the acquisition and validation of competences and/or qualifications is the way of obtaining entry into the list of qualified technical security personnel described in Article 27 of the Act on the protection of persons and property. Apart from the formal conditions (age, medical examination, Police opinion) there are practically no requirements in terms of competences/qualifications. It is sufficient if the person concerned, in accordance with Article 27(2) point 4, (...) *has at least a vocational technical education with a specialisation in electronics, electricity, communications, mechanics, information technology or has completed a course for a technical*

²⁰ Act of 21 May 1999 on weapons and ammunition (consolidated text, Journal of Laws of 2024, item 485).

security officer or has been apprenticed to the aforementioned professions under the provisions of the Act of 22 March 1989 on crafts (Journal of Laws of 2020, item 2159). There are no other provisions at the statutory level that clarify this. A person who obtains such an entry shall be entitled to:

- perform the activities referred to in Art. 3 point 2 of the Act on the protection of persons and property, i.e.:
 - a) *installation of electronic devices and alarm systems signalling threats to protected persons and property, as well as operation, maintenance and repair in the places where they are installed,*
 - b) *installation of mechanical security devices and means, as well as their operation, maintenance, repair and emergency opening in places where they are installed;*
- carry out the activities referred to in Article 27(4) of the mentioned Act, i.e.:
 - 1) *development of a protection plan to the extent specified in Art. 3 point 2,*
 - 2) *organising and managing teams of technical security personnel.*

The activities referred to in the mentioned Article 3 point 2 of the Act on the protection of persons and property do not include the design of security systems – a de facto unregulated aspect. Any person, even one who has no professional training – given the current statutory provisions – can carry out the design of technical security systems.

The approach to the formulation of competence and qualification requirements for service providers carrying out the activities of design, installation and maintenance of technical security systems²¹ is also regulated by military normative requirements, but their impact on the overall market is limited. These regulations do not have sufficient force to translate them into uniform requirements in the civilian sector. Similarly, Annex 1 of the 2023 NPOIK²² only mentions the means of acquiring and validating competence in this field. The document stresses the relevance of delivering technical security officer courses in a specialised continuing education institution operating within the educational system, and refers to the PN-EN 16763 standard *Services for fire safety systems and security systems*. However,

²¹ *Instruction on the protection of military facilities and escorted property – DU-3.14.3(A) (Szt. Gen. 1705/2023) – (classified document).*

²² *Standards for ensuring the proper functioning of critical infrastructure – best practices and recommendations*, Annex 1 to the National Critical Infrastructure Protection Program, Government Centre for Security (RCB), 2023. The text of the Annex is available at: <https://www.gov.pl/web/rcb-en/national-critical-infrastructure-protection-program>.

it should be emphasised that the NPOIK only serves as a recommendation, and in Polish tender practice the most important criterion for the selection of service providers is the lowest price. As a result, the competence and qualifications of contractors are often overlooked unless they are explicitly defined in the law. According to the authors of the report:

(...) the powers set out in the Act on the protection of persons and property apply to two groups of persons – physical protection employees and technical security employees. However, representatives of the sector draw attention to the need to take into account the contemporary understanding of the processes involved in providing safety and security and to adapt the provisions concerning the competences of employees to the current organisational solutions and technologies used.

They also emphasise the need to revise and clarify the rules on the authorisations required to carry out activities in the provision of security and the protection of persons and property in terms of how the various authorisations are obtained. The rules should, on the one hand, ensure reliable verification of the requirements laid down by the rules and, on the other hand, not unduly restrict access and ensure an inflow of workers with the necessary authorisations into the sector.

An analysis of the issues related to the entitlements of practitioners could also be one of the important elements in the discussion related to the identification of typical professional processes and tasks in the sector. This would clarify the scope of the sector and identify points of contact with other sectors (e.g. with the health sector for activities falling within the field of emergency response activities).

In view of the ongoing changes in the range of activities carried out in the sector, it is also important to discuss the identification among them of those the performance of which requires the possession of competences defined by law. With regard to the others, formal confirmation of possession of competences useful for their performance could be voluntary and constitute good practice. Solutions available under the Integrated Qualifications System, in the form of free market or sectoral qualifications, could be used for this. It would be worth considering collaboration between representatives of different stakeholder groups to monitor the sector's needs in this regard, so that entitlements and qualifications in the sector constitute a coherent and transparent system²³.

²³ A. Araminowicz, P. Klatta, T. Radochoński, M. Sierżyńska, *Ochrona i Bezpieczeństwo Mienia i Osób – analiza sektora. Raport z badania*, Kraków 2024..., p. 82.

Education for the sector

The report analyses in detail the sector's education system, formal and non-formal education, and identifies key skills gaps and market needs.

Formal education refers to both vocational education and higher education. Vocational education includes preparation for work in the sector in occupations such as personal and property security technician and occupational health and safety technician. Community colleges offering these courses operate throughout the country and the skills of graduates are confirmed by professional examinations in the qualifications BPO.02 (Protection of persons and property) and BPO.01 (Management of safety in the working environment).

Vocational examinations have varying pass rates. For example, in the summer session of 2023, 62.70% of candidates passed the whole examination for the BPO.02 qualification (of whom 469 people took the written part, passing 90.62%, and 516 people took the practical part, passing 63.37%)²⁴. In the BPO.01 qualification the result was lower and amounted to 40.03% (2087 candidates took the written part and passed 91.42%, 2794 candidates took the practical part and passed 37.62%)²⁵. The data indicate clear difficulties in passing the practical part of the examinations, which may suggest insufficient preparation of graduates for real professional challenges.

Higher education in the area of security includes such majors as national security, internal security, criminology or administration and internal security. Universities offer a large choice of specialisations, but academic diplomas are not sufficient to obtain entry to the list of qualified physical security officers – they only confirm theoretical preparation. Universities for the uniformed services also play an important role in the sector, preparing, among others, future state officers.

In addition to formal education, courses and training are an important part of training in the security sector. These include:

- courses giving the basis for entry into the list of qualified physical security officers, including theoretical and practical preparation in the field of shooting, intervention techniques and law;
- courses for technical security officer (there are no precise requirements in the Act on the protection of persons and property concerning their scope and standards);

²⁴ Ibid., p. 86.

²⁵ Ibid., p. 87.

- obligatory training courses for qualified physical security officers – every 5 years, amounting to 40 hours.

According to representatives of the sector, the system of courses imposed by the Act on the protection of persons and property is not fulfilling its role and should be changed. There is a lack of standardisation in terms of training programmes, ways of validating competences. In addition, appropriate requirements should be placed on training establishments. Moreover, representatives of the sector stated that some courses do not provide real skills and their participants treat them only as a formality aimed at obtaining the relevant certificate. For example, courses organised by continuing education establishments operating within the structures of security agencies – in the author's opinion, are difficult, in such a case, to provide reliable training and validation of competences. Due to increasing labour costs, companies are investing less and less in the development of their employees, which leads to a decrease in the quality of security services.

The results of the survey show that the sector needs more practical and tailored training for today's threats, covering technology as well as legal aspects and security management. Without systemic changes and a proper focus on quality control of courses and training institutions, the sector may have an increasing problem with qualified staff, which will affect the quality and effectiveness of the security services provided.

Trends affecting the sector

The security and safety of property and persons sector faces a number of challenges due to the rapidly changing socio-political, technological and economic environment. These include:

- outflow of Ukrainian security personnel and increased demand for the protection of strategic facilities related to Russia's full-scale invasion of Ukraine;
- strengthening of security management and upgrading of sector personnel competencies resulting from hybrid warfare involving cyber attacks, CI sabotage and disinformation activities;
- changing working patterns after the COVID-19 pandemic – return to stationary and hybrid working, translating into an increase in demand for office and retail security;
- climate change forcing the adaptation of security procedures and technology to extreme weather conditions and natural disasters;

- technological advances transforming the industry through automation, the use of artificial intelligence, unmanned systems and modern surveillance tools, changing the requirements for security personnel;
- implementation of the CER Directive²⁶ forcing an increase in the standards of CI protection, leading to the need for certification of services, people and organisational and technical solutions;
- rising operating costs, including an increase in the minimum wage. This is causing security agencies to reduce the number of physical security personnel and direct the business towards the implementation of technical security systems;
- reducing physical security in some sectors due to the high level of security in Poland (one of the highest in Europe), the increase in shop crime, however, indicates the need to rethink security strategies;
- sustainability and green transformation, which are forcing the industry to comply with ESG (Environmental, Social and Corporate Governance) standards, which includes optimising energy consumption, ecological approach to equipment and reporting on environmental performance.

All these factors will shape the security sector in the coming years. In addition, they require flexibility and innovative approaches to security management.

Competence needs

The results of the analysis of existing data, trends and qualitative and quantitative research have identified the main competency areas needed to provide quality services in the security and safety sector. These include knowledge and skills in:

1. Security management.

Effective security management requires the ability to plan, analyse threats, assess risks and integrate physical protection with technical security systems and cyber security aspects. Knowledge of modern security management methods, effective

²⁶ Directive (EU) 2022/2557 of the European Parliament and of the Council of 14 December 2022 on the resilience of critical entities and repealing Council Directive 2008/114/EC (Official Journal of the EU L 333/164 of 27.12.2022).

crisis communication and the ability to manage dynamic and unpredictable threats are essential.

2. Technological advances.

The growing role of technology in the sector requires competence in the operation and implementation of advanced security systems, including solutions based on artificial intelligence, automation, with the inclusion of modern surveillance tools. The developing unmanned and anti-drone systems are also an important element. It is relevant that both technical specialists and physical security personnel are able to use modern solutions effectively.

3. Evolution of current threats and the emergence of new ones.

The changing geopolitical situation, the development of hybrid warfare, terrorist threats and extreme weather events make it necessary to constantly update knowledge on potential threats. Workers in the sector should be able to identify and analyse new threats and implement effective prevention and response strategies.

4. Performance of physical security tasks, including knowledge of procedures and practical skills.

Physical security personnel must be able to: apply self-defence techniques, use weapons, interact in teams, recognise and neutralise threats. It is also important to adapt operational procedures to changing threats and to provide an appropriate level of training for individuals with varying work experience.

5. Knowledge of the law and the ability to apply it.

Legislative changes require sector staff to update their knowledge of regulations. Knowledge of the law is essential for the proper performance of their duties, in particular with regard to interventions, the protection of CI and the application of security procedures in accordance with applicable standards or norms.

6. Green transformation and the need to align operations with environmental regulation.

Sustainability and ESG regulations are forcing companies in the sector to implement green solutions such as optimising energy consumption, reducing their carbon footprint and managing resources responsibility. Employees in the sector should have knowledge of environmental regulations and the ability to implement them in their daily operations.

Interdisciplinarity is becoming a key requirement in the sector, meaning that employees need to combine knowledge of management, law, technology, cyber security and other areas. Increasing the competence of those responsible for procuring security services is equally important, as the ability to formulate requirements and procurement specifications has a huge impact on the quality of services in the industry. One participant in the qualitative study stated that (...) *security has become strongly interdisciplinary. The boundary of how far security experts in different scientific disciplines should go is blurring*²⁷.

Respondents who took part in the survey were asked to rate each area of competence on a scale of 1 (not very important) to 5 (crucial). The relevance rating is the arithmetic average of the answers given. The most relevant competence area, according to survey participants, is knowledge and skills related to the evolution of current threats and the emergence of new threats. Areas such as security management or knowledge of physical protection procedures and practical skills also received high relevance ratings. Competences related to green transformation are the least relevant according to respondents, which may be due to low awareness of the impact of ESG regulations on the sector (Chart 3).

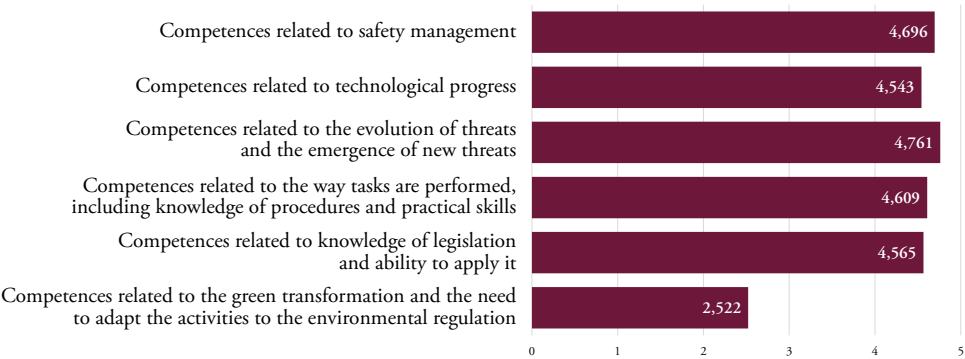


Chart 3. Assessment of competence relevance.

In the next question, respondents were asked to rate the degree of competence shortage on a scale from 1 (not lacking) to 5 (very lacking).

²⁷ A. Araminowicz, P. Klatta, T. Radochoński, M. Sierżyńska, *Ochrona i Bezpieczeństwo Mienia i Osób – analiza sektora. Raport z badania*, Kraków 2024..., p. 132.

Evaluation of the degree is the arithmetic average of the answers given. The greatest shortage of competencies is found in areas related to the evolution of threats and the emergence of new threats, competences related to technological progress and competences related to technological security management (Chart 4).

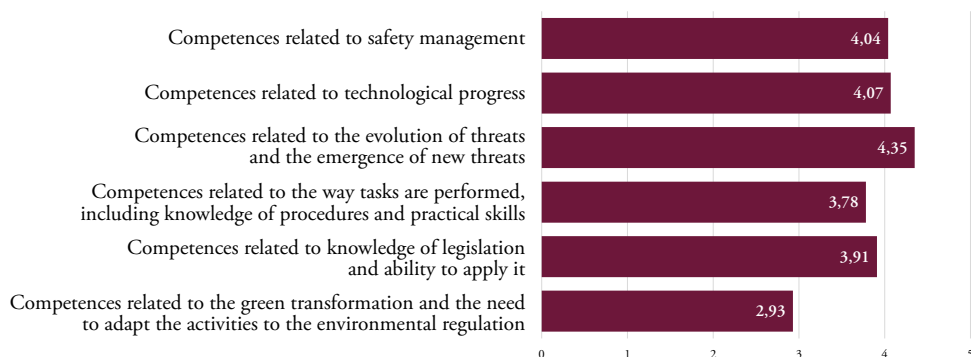


Chart 4. Assessment of the degree of competence gap.

The research carried out confirms that the development of competences in the security and safety of property and persons sector is essential, especially in the context of dynamic technological changes, the evolution of threats and new legal regulations. Particularly important areas requiring training support are competences related to the evolution of threats and the emergence of new threats, to technological advances, and to security management. Competency gaps in these areas pose a major challenge and affect the efficiency and effectiveness of security systems.

The research further indicates that the greatest shortfalls relate to the ability to analyse and counter new threats, including cyber attacks, disinformation and acts of sabotage. Upgrading skills to integrate physical protection with technical safeguards and to operate modern security systems is also important.

Competences related to knowledge of the law and the ability to apply them, which allow for effective and lawful action in crisis situations, are also an important direction of development. In view of the increasing regulatory requirements, especially resulting from the implementation of the CER Directive, training should also include procedures for the protection of CI.

It will also be important to introduce training on green transformation, including aligning operations with environmental regulations and ESG reporting, although respondents rated this topic as the least important. In addition, the security sector often has individuals with very different competences working together, highlighting the need to unify standards and improve practical skills in physical protection, such as the use of weapons, intervention techniques or team cooperation.

It is also recommended to increase the awareness of those responsible for procuring security services and to train them in the formulation of quality requirements for security services. Effective training programmes should be tailored to the specificities of the sector and take into account the interdisciplinary competence by combining knowledge from the areas of management, technology, law and physical protection.

The assessment of training needs is shown in Chart 5. Respondents could indicate up to three areas. The most frequently indicated competences were those related to safety management (34 indications), competences related to the evolution of threats and the emergence of new threats (33 indications) and competences related to technological progress (28 indications).



Chart 5. Assessment of training needs.

In order to effectively fill competence gaps, detailed development and standardisation of requirements for specific competence areas are needed. It is worth considering the implementation of a sectoral qualification framework, which could be addressed by a sectoral competence council, and the development of training programmes to upskill the workforce and adapt the sector to new challenges.

Further analysis should take into account both national and foreign solutions for competency formation in the security and safety sector, which will enable the development of effective tools to support the growth of the sector.

Summary

The security and safety of property and persons sector is facing the need to adapt to dynamic changes, comprehensively described in the report. This requires not only the implementation of new organisational solutions, but also a systemic approach to cooperation, education and regulation. The challenge is to strengthen cooperation between industry organisations (national and international), entrepreneurs, educational institutions and public administration. Given the difficult history of the industry and the negative influence exerted on it by some industry organisations, this element is particularly relevant from the perspective of the competence council's activities. Taking into account different perspectives in the development of standards and regulations can contribute to a more effective response to emerging risks and to improving the quality of services provided. In this context, it is important to draw on the experience of foreign professional organisations and to actively participate in the shaping of European competence standards in the security sector.

Legislative and organisational changes play a significant role in shaping the future of the sector. Many of the existing regulations are out of step with modern realities, resulting in difficulties in the interpretation of the regulations and their practical application, such as inconsistent competence requirements for qualified technical security personnel. It is therefore important to make the regulations more coherent and up-to-date so that they meet the real requirements of the market. The introduction of transparent regulations on professional entitlements in the security sector would both improve the quality of services provided and facilitate access to the profession for competent persons. A thorough amendment of the Act on the protection of persons and property, with the participation of a competence council, is a good direction. In the coming years, the impact of the amended Act on crisis management, which implements the CER Directive, will be important. Specific requirements for CI operators are to be expected – standardisation will cover the competences

of not only the operators' staff, but also the external service providers and the organisational and technical solutions that the operators will be required to use. In the long term, it will be necessary to standardise requirements across the sector, with a particular focus on the competences and qualifications of the sector's staff.

Improving the image of employees in the sector is also one of the important challenges. Currently, working in security is often associated with low demands and few opportunities for development, which reduces the supply of qualified staff. Building a positive image of the sector as an area offering stable employment, professional development and the opportunity to perform socially relevant tasks is necessary to attract new employees and increase the prestige of the profession²⁸.

Ensuring high-quality training and paying more attention to the practical part in education should also be an integral part of professionalising the industry. The current education systems and compulsory further education courses do not always fulfil their function, and many companies cut back on spending on employee development for financial and formal reasons.

The introduction of more effective quality control mechanisms for training and training institutions, as well as closer cooperation between universities and employers, could significantly improve the preparation of candidates for the sector. Adapting the educational offer of modern technologies and changing risks is key.

The Integrated Qualifications System (IQS) is relevant and its importance will increase in the coming years. Although there are many regulated qualifications in the sector, none of them have been included in the IQS so far. Such a move would increase the transparency of professional requirements and make them easier to compare. There is a need to review existing qualifications and adapt them to the contemporary needs of the sector.

Further exploration of competences required in the sector and the identification of tools supporting professional development of employees should also respond to these challenges. The creation of a sectoral qualifications framework and clarification of competency

²⁸ It is worth mentioning that POLALARM has been pushing for the recognition of the technical security profession as a profession of public trust for many years – through the partnership in the competence council, the implementation of such ideas will become possible.

standards for individual job roles would allow for better management of career paths in the sector. In addition, an analysis of existing solutions used in other sectors and countries could provide valuable insights into effective training methods and skills validation.

The sectoral competence council for the security and safety of property and persons sector is a tool to respond effectively to the challenges described in the report. The Council will work towards the professionalisation of the sector by integrating experts, entrepreneurs, representatives of the public administration and education. Its overarching goal will be to adapt the qualifications and competences of the sector's employees to dynamically changing realities in a broad context. The Council will bring together a group of distinguished experts with professional knowledge and experience, whose task will be to develop systemic solutions to improve the quality of security and safety services. Through cooperation with public institutions and industry organisations, it will not only monitor the needs of the market, but also initiate legislative, certification and educational activities. Sectoral competence councils operating in other areas of the economy have been effective in contributing to the harmonisation of competence and qualification standards. We intend to achieve the same effect in the security sector.

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