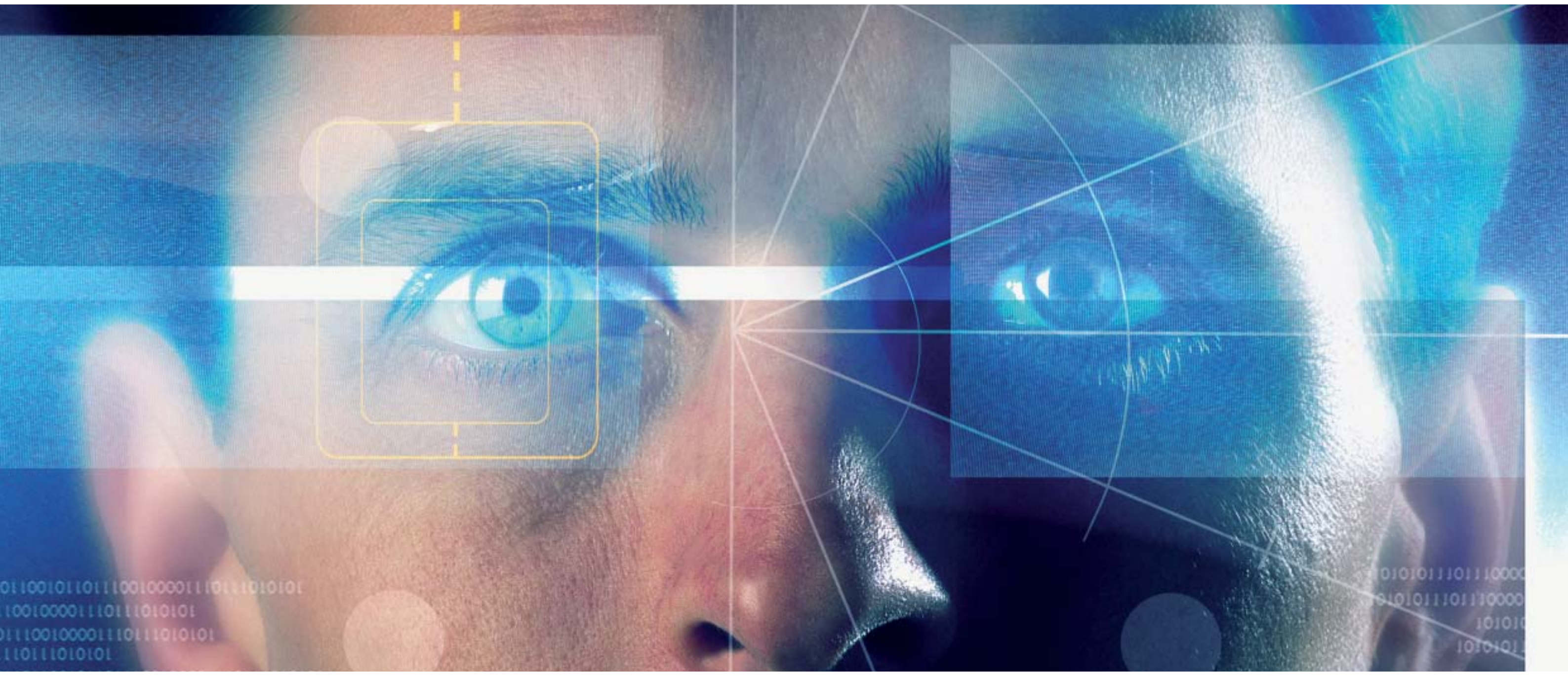
FederSicurezza

2009 Report from **FederSicurezza**: realities and scenarios in **Italian private security** in the European context

Presentation and introduction to the **2009** update

Preface by the **President** of **Confcommercio**, Mr Carlo **Sangalli**

It was with great pleasure that, again this year, I accepted the request to introduce the Report presented by FederSicurezza. Having attained universal acclaim in 2008 by constituting an absolute innovation in the national panorama in terms of analyses of the sector, the Report is confirmed as an undeniable landmark in the awareness of a sector in which FederSicurezza - Confcommercio, the Federation of the Sector of Private Surveillance and Security, which brings together the associations of the complementary security chain (Univ, AssVigilanza, Anssat, Anisi, Anivp), without a shadow of doubt expresses the most significant entity.
This Federation represents 65% of the Security Firms and transporters of valuables that operate in the national marketplace, 85% of Italian satellite radiolocalization companies, and a substantial and growing quota of integrated service companies, whose identikit in the 2009 Report will examine in depth - and this time it is also a cognitive first for our country - offering, among other information and updates on the sector of complementary security, elements to comprehend its profile and entrepreneurial contents.
Overall, FederSicurezza currently represents around 450 firms (more than 70% of which are made up of private Security Firms) which employ over 35,000 workers (of which approximately 75% are active in Surveillance), with an annual turnover in the region of 3.5 billion euro. These are important figures, which must be updated almost on a daily basis, both with respect to the progressive increase of the economic value and to the dimensional growth of the firms and employees.
But if the evolutionary trends highlight positive signals for the dimensions of the companies, personnel and turnover, there are still some crucial issues to be resolved before the path is cleared for a sector that could assist the long-awaited recovery of the economy, particularly in these



times of considerable domestic and international recession. Regional income tax, in fact, is still an extremely heavy burden on the accounts of complementary security companies. In the light of the, albeit shared, recent tables from the Ministry of Labour, the services of a sworn security guard cannot cost less than 21.50 euro per hour, solely for the costs deriving from the application of the national contract and the safety of the operators (that is, without considering the possible increased burden of the application of any applicable territorial integrative contracts). The result is that the cost of a security guard can range from 40 to 50 thousand euro per year: decidedly too much.

Still more serious, and actually getting progressively worse, is the question of the sale price of the service and its correct definition. Agreed, the country is undergoing a crisis; agreed, it is fair and understandable that in the public and parapublic sector, before and more so than in the private sector, attention is paid to the economic aspect of a service.

However, it beggars belief that we persist in accepting price as the only variable for the choice of a supplier, as is currently done in practically every single competitive tender held by the public administration or by larger businesses.

It is not possible to think of planning, accomplishing and managing security, particularly in a large company or in a collection of companies, based solely on the parameter of the lowest price. It is also necessary to consider the professional technical level, and the modernity and efficiency of the Institute that supplies the surveillance service. Not doing so means misrepresenting the market and damaging all the players, with serious consequences for the entire national system.

And this should not be permitted, for the seriousness and delicacy of this division which, we cannot tire of emphasizing, witnesses the daily employment all over Italy of workers who perform their duties while carrying firearms. Finally, turning to the international dimension, I wish to underline how FederSicurezza is working for the definitive confirmation of the derogation to the so-called “Bolkestein directive” of the European Union, which was already conceded to the sector until the end of 2010, and how this action of strategic worth has the full support of Confcommercio.

I am, in fact, convinced that the commitment of FederSicurezza for the formalization and recognition of the role of private security within our national security system must also be supported in the European context, where we hope realistic acknowledgment will be made that “the Italian approach to complementary security”, far from being threadbare, is beginning to be carefully evaluated, and perhaps imitated, by various other countries.

Mr Carlo Sangalli
President of Confcommercio-Firms for Italy

Presentation by the **President** of **Federsicurezza**, Counsel Luigi **Gabriele**

Beginning … a tradition … is not an inconsequential commitment.
As of this year, this commitment, perhaps with presumption, for us in Federsicurezza - Confcommercio, begins to take on connotations of certainty, to the point where we may speculate that, in 2010, we will commence with the maligned but valid “it never rains but it pours”. After a year, some things have changed. We seem to have embarked on a modifying path; at least a legislative face-lift has intervened. The problems, however, remain.
The market is declining rapidly, intermediation is motivated to prevail and the consequences are before the eyes of all and in the … pockets of many. The social players however seem slightly… put out - and they don’t mind our saying it.
Certainly there is an appreciable sense of humour of the kind that organizes dances in the ballrooms of the Titanic. When this will produce positive effects is difficult to say. Let us ensure that we adhere to reality and take things in the correct order. Let us begin with the customer base.
What are most of them interested in?
Minimum service with the greatest markdown.
Shall we begin with the quality of the service?
It seems that it must be acquired without reflections on the costs, otherwise, it isn’t worth the …de minimis non curat Pretor…
Shall we begin with the requisites of individual and collective, direct and reflected security?
Provided that they are not a burden! Shall we begin with the correctness of the application of institutes that cannot but entail burdens?
Let us take up arms and … off you go!
And so on, certainly causing the reader to feel bored and to have a lack of consideration for the writer.

We were bearers of one of the best systems in terms of structure and for the type of services rendered, so much so that we became the recipients of a Pisanu Decree and were comprised in the methods of fighting terrorism.
We were, and in many ways, we fortunately still are, bearers of envied and enviable points of excellence.
Well, in spite of this, we have witnessed and sometimes collaborated in the edification of a Tower of Babel and in the entrusting of its surveillance to the long-awaited citizen patrols.
It is true that the culture of the writer of these somewhat confused thoughts identifies the Citizen Patrols with olive-drab, and will say no more.
It is also true that, just because military service was abolished, we are not obliged to abolish private surveillance ex 134 TULPS and subsequent laws.
It is true that the culture of the aforementioned subject has witnessed and experienced pinball machines … but it is certainly not obligatory to be determined to play until we TILT.
A useful remedy for the purpose?
Abandon the set formats, conserve what is good, perfect the instruments, etcetera, etcetera, etcetera…
The world is changing but our DNA does not seem to have fully perceived the change.
Yet DNA cannot but be evolving.
Today we are speaking of numbers, so at least here, let us not lose our focus … Today we are once again comforted by the nearness of our holding company and we thank President Sangalli, who, despite his burdensome and continuous commitments, never leaves us – in every sense – alone.
Today the Institutions are as always present, at the elevated, … in every sense, level of Undersecretary Alfredo Mantovano who has always

followed us and who, as he is in any case a Magistrate of the Republic, we however ask to … suspend any judgement he may have.
Can we make a great effort, in a coherent and shared way?
Then let us change gear and endeavour, not to correct but actually to rewrite the rules, all of them, and all together, in a logical order and without a conservative will.
Let us accompany this evolution of our DNA, let us trust each other, and let us try to say that our choice between renewing ourselves and perishing has been courageously made and that we want to pay the price.
We may start from the necessary reconsideration of the overall picture, we shall break it down and reassemble it into a harmonious, fluid, essentially airy and modern construction and we will take advantage of our renewed vice-presidency of the European representation organization, to export it before some “news” from abroad determines consequences that are not exactly agreeable for our system.
We are here, and we wish to stay.
Not alone. Not, however, obligatorily with everybody.
Thus we expect, or rather we hope for a pressing and intellectually honest debate, with whoever wishes to debate with us, when and how they choose.
Thank you, until the next time.

Counsel Luigi Gabriele
President of FederSicurezza

Letter from **Prefect Linardi**

Dear President,
I am writing in reply to your generous invitation to the 2nd annual Congress for the presentation of the FederSicurezza 2009 Report on Italian private security: "DNA in evolution", which will be held in Rome in the Confcommercio conference centre next 8 July. This congress falls at a distance of almost a year since the emanation of the provision for the modification of the measures regarding the matter of private surveillance, imposed by the well-known sentence of the European Community Court of Justice no. C-465 dated 13 July 2007, which had declared that numerous measures of the Single Text of the laws on public safety and of the related execution Regulation that disciplined the matter were in contrast with the provisions of the Treaty. The commitment of the Department of public security to the regulatory revision of private security and to the emanation of the first, relevant, guidelines was important, but many things remain to be done to bring a sector of such undisputed importance "back on track".
To this end, I remind myself of the data of the previous congress organized by FederSicurezza, which speak of more than 965 firms, for a total of nearly 50,000 employees and an overall turnover in excess of 2.4 billion euro. But, naturally, for the institutional "mission" it is my honour to represent, I also think of the requirements of order and public security and of the circumstances by which the system, side by side with the tasks entrusted to the public security Authorities and the police Forces, has long recognized a system of "subsidiary security", from which arises "complementary security", which allows the devolution to private firms of those activities that do not presuppose the exercising of coercive powers. As has often been noted by the Council of State, we are dealing with activities which, for the incidence and the quality of the services supplied and for their high level of danger and operational specialization, were originally reserved for the public Force, and which have been progressively entrusted or granted to the institutes of surveillance and to sworn security guards. This is how things effectively stand and substance must be given to these concepts. For this purpose, too, it is indispensable to continue decisively and rapidly on the path traced by the regulatory reform, accelerating the emanation of the implemental measures of the Decree of the President of the Republic of 4 August 2008, no. 253, for whose adoption progress is being made on the work of the central consulting Commission for the activities referred to in article 134 of the T.U.L.P.S., which, as is well known, has constituted two sub-groups that will carry out the in-depth examinations necessary for the definition of the "technical ability" required of the firms, the background of which is the broad theme of the professional training of the personnel. Those mentioned are only two significant examples of the themes to be tackled, two examples, that is, of a reform to be launched in the implementation of the reform currently in progress. Naturally, we know we can count on the collaborative contribution and, still more, in institutional terms, on the "loyal collaboration" of the Associations of the entrepreneurs of private security and the trade union Organizations of sworn security guards, which, like the Department of public security, are dedicated to the development of subsidiary security, not only from the perspective of reinforcing that perception of security so beloved of Italian citizens, but also from the point of view of integrated security to improve the liveability of our towns.
Yours sincerely.

Mr Giuseppe Linardi
Director of the Office for General Administration,
"Department of Public Security, Ministry of the Interior"

FederSicurezza
Report **2009** update

The **figures**, from **Italy** to Europe

The new "snapshot" captured by the research office of Federsicurezza on the situation in the sector does not differ substantially from that which was illustrated during the presentation of the first report in May 2008. But this is only an apparent "dead calm", especially if certain data are associated with the evolutions in progress in the sector and with the macroeconomic conjuncture.
It being understood that the methodology followed is the same as that of the first report[1], the data illustrated here are mainly referred to the 2007 trading period, with the significant exception of the number of employees, which was updated in 2008 and which we detail here below together with the table of the number of firms, with the relative regional and macroregional subdivisions and the deviations from the preceding surveys:

REGION	No. of companies (2006)	No. of companies (2007)	Variation (%)	No. of employees (2007)	No. of Employees (2008)	Variation (%)
Abruzzo	28	25	-10,71%	677	545	-19,50%
Basilicata	13	13	-	704	718	1,99%
Calabria	28	25	-10,71%	943	999	5,94%
Campania	102	103	0,98%	5.705	5.842	2,40%
Emilia Romagna	63	61	-3,17%	3.727	5.485	47,17%
Friuli Venezia Giulia	21	19	-9,52%	593	705	18,89%
Lazio	124	120	-3,23%	8.066	6.690	-17,06%
Liguria	27	25	-7,41%	1.421	1.023	-28,01%
Lombardy	154	158	2,60%	8.191	8.442	3,06%
Marche	171	9	11,76%	481	411	-14,55%
Molise	4	3	-25,00%	139	176	26,62%
Piedmont - Valle d'Aosta	47	42	-10,64%	1.917	1.807	-5,74%
Apulia	107	111	3,74%	3.630	3.717	2,40%
Sardinia	35	35	-	2.290	2.531	10,52%
Sicily	70	67	-4,29%	4.293	4.491	4,61%
Tuscany	49	52	6,12%	3.257	2.787	-14,43%
Trentino Alto Adige	9	9	-	250	336	34,40%
Umbria	14	12	-14,29%	580	534	-7,93%
Veneto	53	55	3,77%	2.302	1.800	-21,81%
NORTH	**374**	**369**	**-1,34%**	**18.401**	**19.598**	**6,51%**
CENTRE	**236**	**231**	**-2,12%**	**13.200**	**11.143**	**-15,58%**
SOUTH	**355**	**354**	**-0,28%**	**17.565**	**18.298**	**4,17%**
TOTAL	**965**	**954**	**-1,14%**	**49.166**	**49.039**	**-0,26%**

We suggest some considerations; **the number of employees and companies is undergoing a slight decline**, and this in spite of the fact that security continues to represent a social emergency. This statistic confirms that which has already been highlighted in several parts

1 - *The methodological notes are inserted on page 12 of the 2008 report, which can be downloaded from the following link: http://www.federsicurezza.it/download.asp*

of the 2008 report; that is, that an increase in the lack of confidence does not necessarily correspond to a generalized increase in the demand for private security services.

Dwelling for a moment on the number of employees, we note that at (almost) parity of the total, there are even sizable deviations within the subdivisions by region and macroregion. This is largely due to the reorganization process currently underway, especially in major companies, and which comprises merger and unification operations that “move” employees from one region/macroregion to another. This trend is destined to continue in the years to come, diminishing the significance of the subdivision of the number of employees (and of companies) implemented considering the legal headquarters of the business. Regarding turnover, a slight increase can be registered – 50 million euro, equal to + 2% – which brings the total for 2007 to **2.45 billion euro** (against the 2.4 billion of last year) (+ 2%) and the average per company to 2.54 million euro. There is confirmation that the **average number of employees** per company **is 51**, and approximately 50,000 euro is invoiced per worker each year.

Now to a quick bird’s eye view of some statistics that were already analyzed during the course of the first report.
The graphs that show, respectively, the percentage subdivision by company type, class of turnover and employees are essentially identical to the previous ones, with the exception of the last one which shows a downward trend in the class comprising up to 15 workers. In general, for all three of these surveys we expect more consistent variations in the coming years.
The pain continues as we examine the profitability of the companies. Those that close with **accounts in the red** are now **49%**, as opposed to 47% in the previous survey. We can only repeat our opinion that there is an urgent need for legislative intervention to lighten the fiscal burden that weighs upon the companies in the sector, which is above all due to regional income tax.

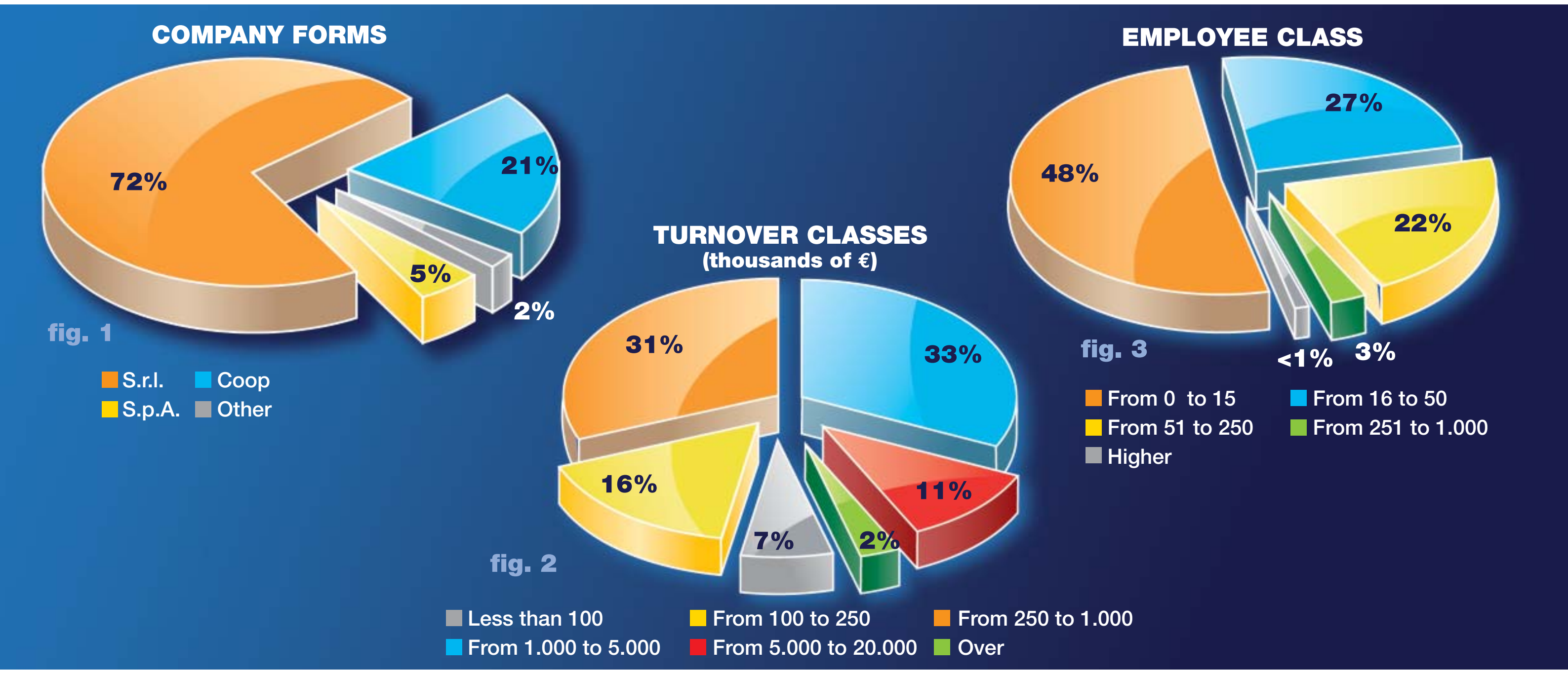


figure 1 figure 2 figure 3

ISTAT (the National Statistics Institute) and Private Security

This year, for the first time, the national statistics Institute has inserted private security services into the calculation of the indexes of contractual retributions. In particular, in implementing the publication of the new series of the index of contractual retributions with a reference base, similarly to that which is established by the European Regulation on cyclical statistics, of December 2005 = 100 (whereas the previous series had the month of December 2000 as a base), ISTAT has also included the sector of private security services, which was previously excluded from the field of observation of the survey. On the occasion of this survey (which ISTAT announced with its information note of 7 April 2009 under the title "The index numbers of contractual retributions: the new series on the December 2005 = 100 base"), a profitable collaboration was begun between the National Statistics Institute and FederSicurezza, which has already achieved constructive results and may also develop through greater analytic and informative synergies in the future.
Thanks also to the positive work carried out together and to subsequent organizational technical elaborations, ISTAT has decided to make its own important contribution and participate in the Congress of the presentation of this second annual FederSicurezza Report, thus paving the way to future and more complex partnership activities.

A glance at 2008/2009

In the light of the particular historical moment which this sector is experiencing, and of the international economic conjuncture, factors that risk making some - albeit fresh - data that arise from the updating of the report rather out of date, it seemed appropriate to us to provide some projections on the evolutions that are underway, as we have observed them.
In synthesis, the new regulations on licences and tariffs are permitting a significant reduction in structural costs for the larger groups which have more than one operating centre, and at the same time an increase in competition on tariffs, principally on surveillance.
Apart from the above, the sudden and acute recession entails a series of

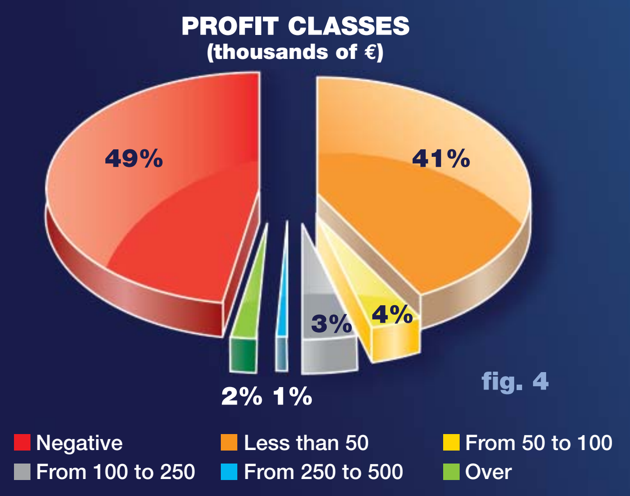


figure 4

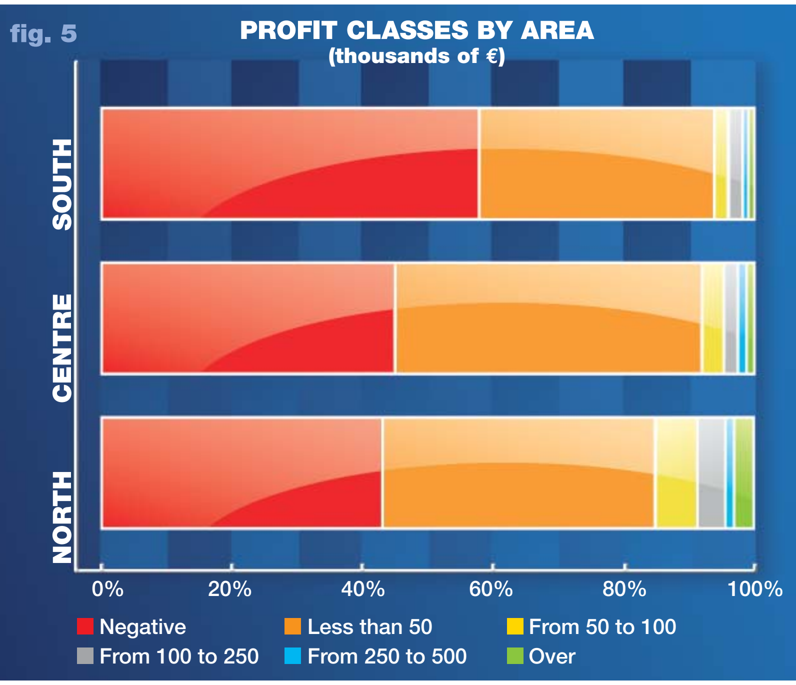


figure 5

structural effects. The most obvious ones are those regarding the prices and volumes of the services and the capital in circulation. However, there is also greater difficulty in optimizing human resources using natural turnover and other elements of flexibility typical of the sector and of nocturnal work in general. This creates a dangerous rigidity in the workforce in a sector that is already heavily penalized by regional income tax and severance pay. The risk is that, not being able to continually adapt the workforce to the consistency of the contracts, the sector must drastically reduce the level of absolute employment, the desirable regulatory interventions remaining valid, especially regarding the transferability of the labour force together with competitive tenders. The creation of industrial synergies, including transfer or fusion operations, is the predictable opening of a sector which up to now was too fragmented because it was too tightly regulated.

Antonello Villa
Project Coordinator

CoESS member States	Population	Forces of order	Population/ Forces of order	Number of Companies	Employees	Employees per Company	Population/ Employees
Austria	8,316,487	20,000	415.8	200	10,000	50.0	831.6
Belgium	10,403,951	39,000	266.8	196	12,673	64.7	821.0
Bosnia	4,590,310			41	2,000	48.8	2,295.2
Bulgaria	7,262,675	47,000	154.5	1,029	58,700	57.0	123.7
Croatia	4,491,543	19,000	236.4	246	16,000	65.0	280.7
Cyprus	792,604	3,000	264.2	60	1,700	28.3	466.2
Czech Republic	10,220,911	46,000	222.2	5,629	51,542	9.2	198.3
Denmark	5,475,791	14,000	391.1	338	5,250	15.5	1,043.0
Estonia	1,342,409	3,200	419.5	242	6,000	24.8	223.7
Finland	5,244,749	7,500	699.3	200	10,000	50.0	524.5
France	64,057,790	250,000	256.2	4,800	150,000	31.3	427.1
Germany	82,369,548	250,000	329.5	3,500	173,000	49.4	476.1
Greece	10,722,816	50,000	214.5	1,000	30,000	30.0	357.4
Hungary	10,076,581	40,000	251.9	11,304	80,000	7.1	126.0
Ireland	4,329,925	12,265	353.0	840	10,500	12.5	412.4
Italy	**59,131,287**	**310,000**	**190.7**	**965**	**49,166**	**50.9**	**1,202.7**
Latvia	2,286,700	10,600	215.7	300	5,500	18.3	415.8
Lithuania	3,565,205	20,000	178.3	67	10,000	149.3	356.5
Luxembourg	472,649	1,573	300.5	10	2,200	220.0	214.8
Macedonia	2,061,315			152	5,600	36.8	368.1
Malta	410,209	1,904	215.4	6	1,600	266.7	256.4
Norway	4,644,457	8,185	567.4	257	12,000	46.7	387.0
Poland	38,626,349	100,000	386.3	3,600	165,000	45.8	234.1
Portugal	10,676,910	46,000	232.1	113	28,000	247.8	381.3
Romania	22,246,862	55,000	404.5	1,099	92,000	83.7	241.8
Serbia	10,150,265	34,000	298.5	158	28,000	177.2	362.5
Slovakia	5,455,407	21,500	253.7	1,730	17,200	9.9	317.2
Slovenia	2,077,070	7,500	276.9	100	4,500	45.0	461.6
Spain	40,491,052	223,000	181.6	1,219	83,000	68.1	487.8
Sweden	9,045,389	18,000	502.5	250	13,500	54.0	670.0
Switzerland	7,581,520	16,000	473.8	464	8,617	18.6	879.8
The Netherlands	16,645,313	49,000	339.7	320	33,158	103.6	502.0
Turkey	71,892,807	145,000	495.8	937	218,660	233.4	328.8
United Kingdom	60,943,912	141,398	431.0	1,500	250,000	166.7	243.8
TOTAL	**598,102,768**	**2,009,625**		**42,872**	**1,645066**		
AVERAGE	**17,591,258**	**62,801**	**297,6**	**1,261**	**48,384**	**38**	**363.6**

* values are expressed in thousands of €

A **comparison** with the **European context**

Forces of order/ Employee	Market turnover*	Turnover per Employee*	Turnover per Company*
2.00	212,000	21.2	1,060.0
3.08	556,000	43.9	2,836.7
0.80	224,500	3.8	218.2
1.19	160,000	10.0	650.4
1.76	25,000	14.7	416.7
0.89			
2.67	250,000	47.6	739.6
0.53	128,205	21.4	529.8
0.75			
1.67	4,380,000	29.2	912.5
1.45	4,350,000	25.1	1,242.9
1.67	275,000	9.2	275.0
0.50	550,000	6.9	48.7
1.17			
6.31	**2,400,000**	**48.8**	**2,487.0**
1.93			
2.00			
0.72			
1.19			
0.68	913,510	76.1	3,554.5
0.61	1,000,000	6.1	277.8
1.64	677,000	24.2	5,991.2
0.60	40,322	0.4	36.7
1.21			
1.25			
1.67	1,300	0.3	13.0
2.69	3,579,000	43.1	2,936.0
1.33	700,000	51.9	2,800.0
1.86	447,050	51.9	963.5
1.48	1,300,000	39.2	4,062.5
0.66	2,000,000	9.1	2,134.5
0.57	3,489,349	14.0	2,326.2
	27,658,236		
1,22	**1,202,532**	**16.8**	**645.1**

Italy is unquestionably neither the most populous nor the largest country in Europe, but it faces little competition in holding the record for the number of regular members of the forces of order; we could say the same about the ratio that exists between their numbers and the number of inhabitants (which is only lower in Bulgaria and Spain), if in addition to the numbers of the forces of the Police, the Carabinieri Corps and the Financial Guard we also add the municipal Police, an integral part of our security system, which would increase the count by more that a quarter. At the other extreme of this particular classification, we find the podium completely occupied by the Scandinavian countries, which, in consideration of a balanced ratio with the number of private operators (between 0.68 and 1.33), demonstrate that every aspect of security is greatly conditioned by the pertaining cultural domain. On the other hand, in Italy, the national integrated security system may count on a meagre number of sworn security guards (49166[1]), bottom of the table in Europe when placed in relation to the number of inhabitants. It is thus no surprise that the ratio between private security agents and the forces of order in Italy is 1 to 6.31, the lowest in Europe and a long way from the average of 1 to 1.22. It is interesting to note that in some 11 of the countries examined, which were heterogeneous for culture and geographical position, the number of private security guards exceeds that of the forces of order; the only element of continuity in this matter is represented by the so-called former Soviet countries, which have probably found themselves in the position of having to utilize private initiative to absorb the outflows from that strongly state-controlled system that characterized them until the beginning of the '90s. Returning to us; although the private surveillance sector in Italy may count on a somewhat restricted market, probably closed by the broad intervention provided by the State in matters of security, it gives me pleasure to highlight that Italian companies guarantee a turnover of more than twice

1 - The datum refers only to armed guards, to which more than 78,000 facility management operators should be added the European average, and that we stand in 4th place for worker productivity (calculated on market turnover).

Figure 6 shows some important aspects for that which concerns the training requirements that the operators of security firms in Europe are called upon to fulfil in order to obtain the authorization to supply the services performed; at first glance it is easy to observe how the lesser requisites in terms of overall training hours correspond primarily with the countries whose legislation on the matter prohibits the use of firearms, surely an argument in favour of those who insist on the weapon as a qualification tool of the service. Only two countries (France and Greece) authorize the use of firearms for deterrent purposes exclusively for the services of transporting valuables. Many countries still have no precise regulations relating to training, or the definition of the contents and duration of training is entrusted directly to the expertise of the sector, while a by-now widespread line is that which considers the security firms to be incapable of meeting the training requirements of the operators directly and envisages that said firms should avail of independent training institutes to guarantee definite control over levels of quality and duration.

Mr Giuseppe Gabriele

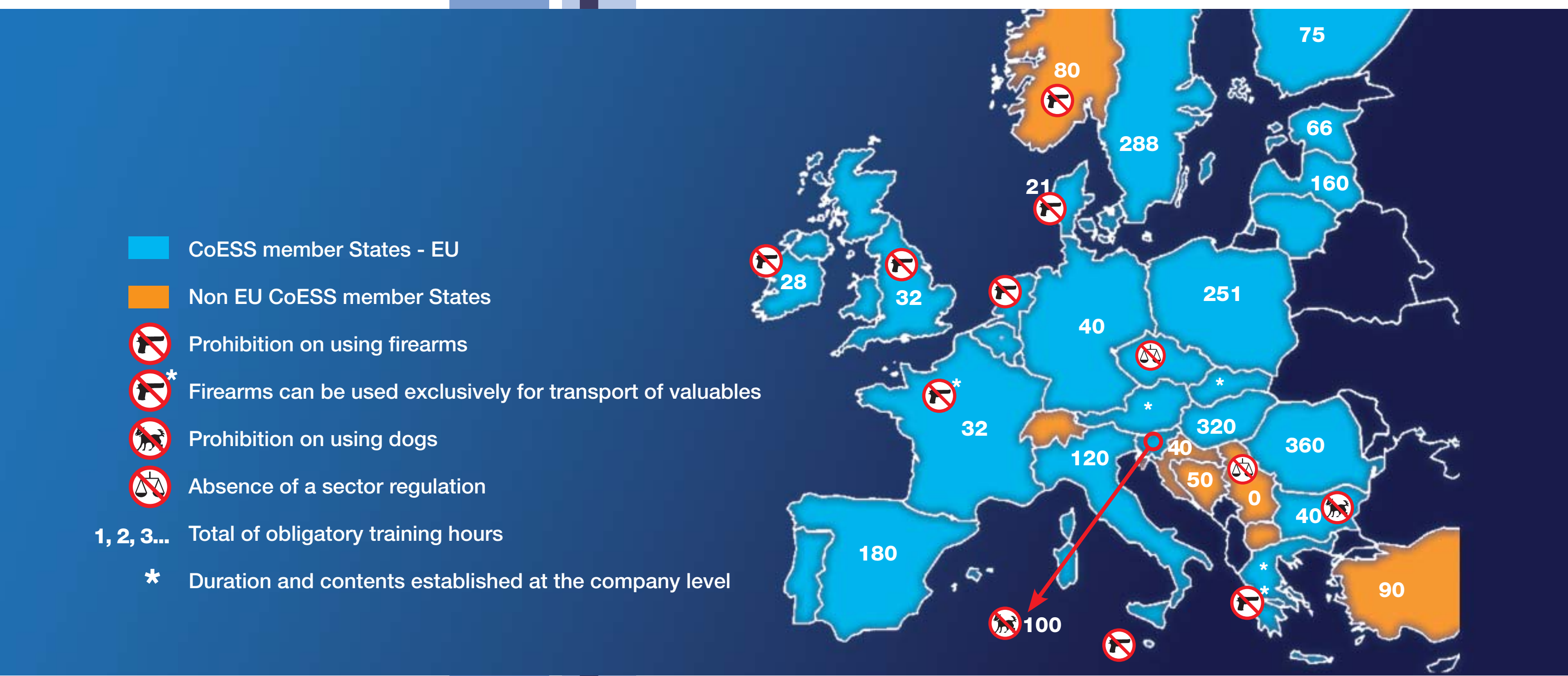
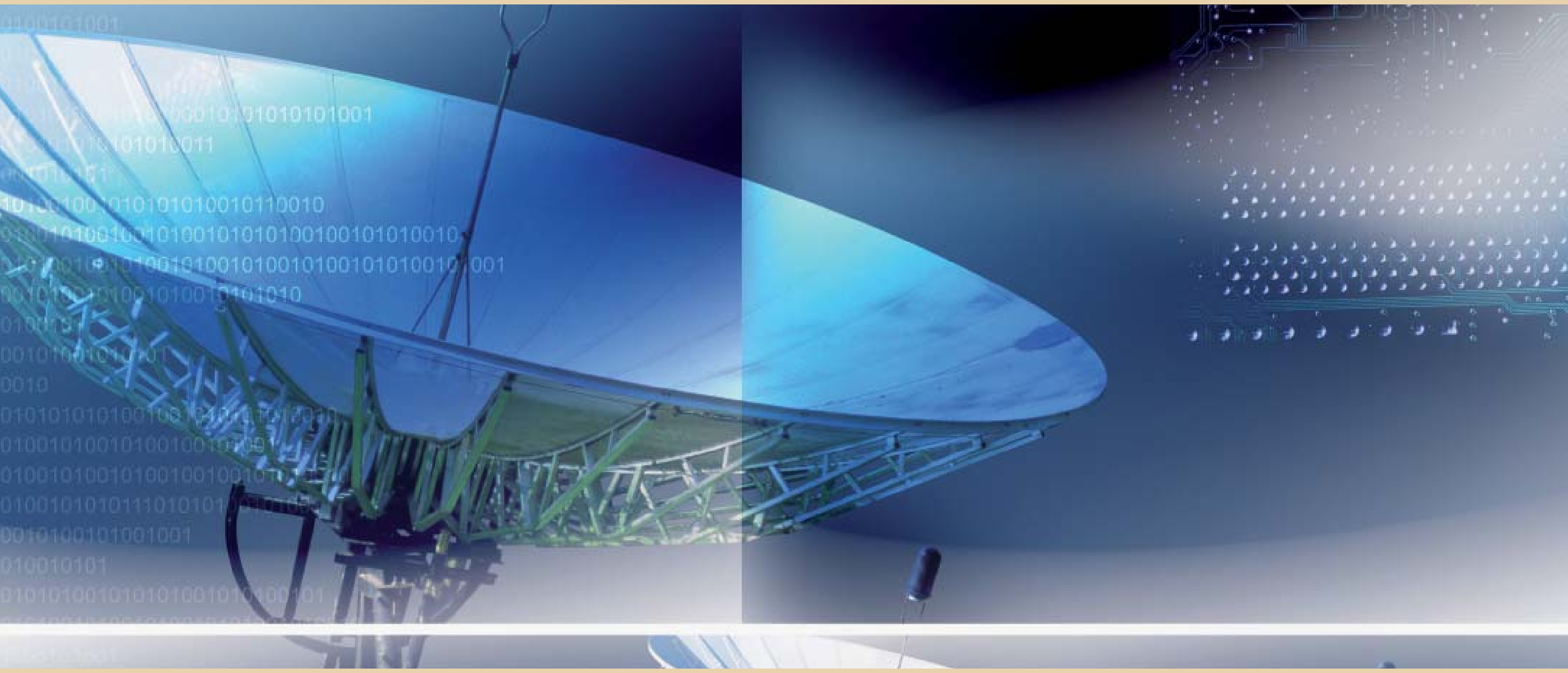


figure 6

The **elaborations** of the **2009** report



The **advantages** of satellite **radiolocalization**

A.N.S.SA.T. (the National Association of Satellite and Telematic Services), an adherent of FederSicurezza - Confcommercio, was founded in April 1997 and is an Association "not-for-profit, without ties to political parties and autonomous with respect to public powers, among companies, howsoever denominated or legally organized, which carry out, within the sphere of the laws that regulate the subject matter, security services and assistance on means of transport through operational centres and with the use of telematic and satellite localization systems, as well as the producer companies of hardware and software for radiolocalization".
A.N.S.SA.T. represents the principal Italian companies that deal with the construction and/or distribution of remote-control services with professional satellite radiolocalization systems, which employ more than 400 highly specialized workers, with a global turnover in excess of 60,000,000 euro per annum. Some of these companies are business units of important national groups of the Private Security Sector which, globally, employ approximately 8,000 people with a turnover in excess of 600,000,000 euro. The associated companies provide advanced security services on more than 80% of heavy goods vehicles fitted with satellite systems, with a professional security service.
During the course of the last few years, the monitoring activity of vehicles carried out by the members of A.N.S.SA.T. has produced a saving for insurance companies, or for the private firms or haulage companies or for the commissioners of the transport, of an annual average of 55 million Euro for thwarted thefts and robberies.
This research examined the activity of approximately 800 vehicles that transported goods of similar types and uniform routes in the territory of Italy. This was so as to provide a framework of the importance, for the security of transports, of the adoption of radiolocalization systems on heavy goods vehicles. The comparison is made by comparing journeys

fig.7

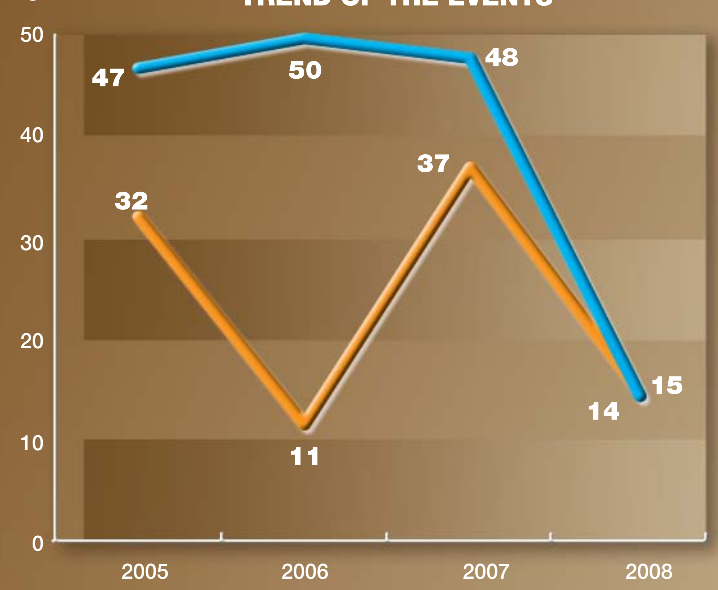


fig. 8

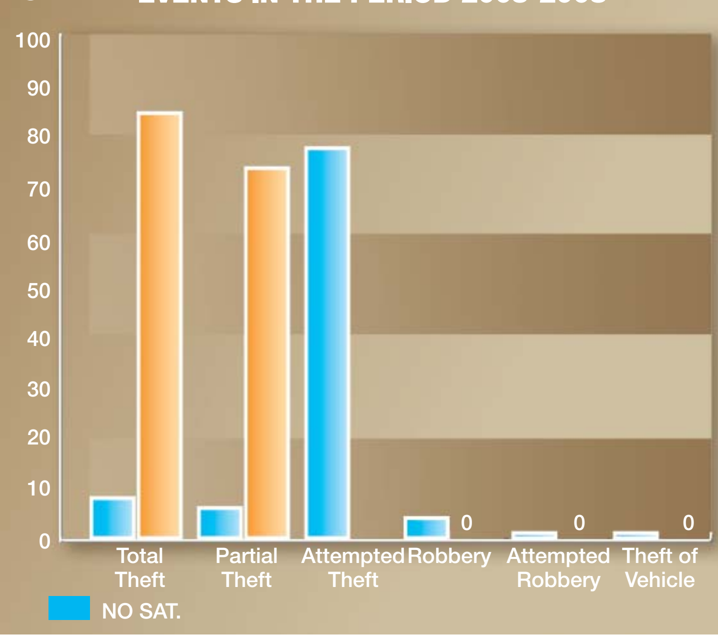


figure 7

figure 8

between roughly 50% of vehicles equipped with professional security systems and around 50% of vehicles with no security systems fitted.
Figure 7 represents the global number of the events that occurred with vehicles fitted and not fitted with satellite radiolocalization systems. As can be seen, there was a noteworthy reduction of events in 2008 due to

an increasing number of counter actions, owing to both the organization of transport security and also to the actions implemented by the police forces which, thanks to the use of data provided by the surveillance systems, were often able to implement significant activities of repression of the phenomenon.

Figure 8 shows the events by type.

As can be seen, most of the events take place on vehicles that are not equipped with satellite radiolocalization systems.

In particular, it is possible to observe the large number of vehicles that have suffered the theft of all the goods they were carrying. As far as partial theft is concerned, it is important to note how the entity of the partially stolen goods is different. In the case of a vehicle fitted with a satellite radiolocalization system, the quantity of stolen goods is relatively small (a few packages) in that the activation of acoustic alarm systems disturbs the criminal activity, whereas in vehicles without satellite radiolocalization systems, the damage is greater. There were four robberies carried out, with one being only attempted, thanks to the bravura of the driver who managed to foil it. The theft of the vehicle occurred in a workshop, while it was undergoing maintenance, but the presence of the system made its recovery possible.

Figure 9 indicates, by percentage, the type of event to which the vehicles fitted with satellite radiolocalization systems were subject to.

In 86%, damage was avoided totally (80%) or partially (6%) thanks to the presence and operation of the satellite radiolocalization system. Only in 12% of the cases (total theft 8% and robberies 4%) was the damage complete.

Analyzing these cases one by one, it is revealed that this occurrence was due to the driver's failure to observe the measures imparted: the most frequent cause was parking in unsafe areas.

Figure 10 shows how, in the event of an occurrence, there is always an economic damage. In 53% of the cases, there is a significant event with theft of the totality of the goods, and in 47% of the cases there is partial

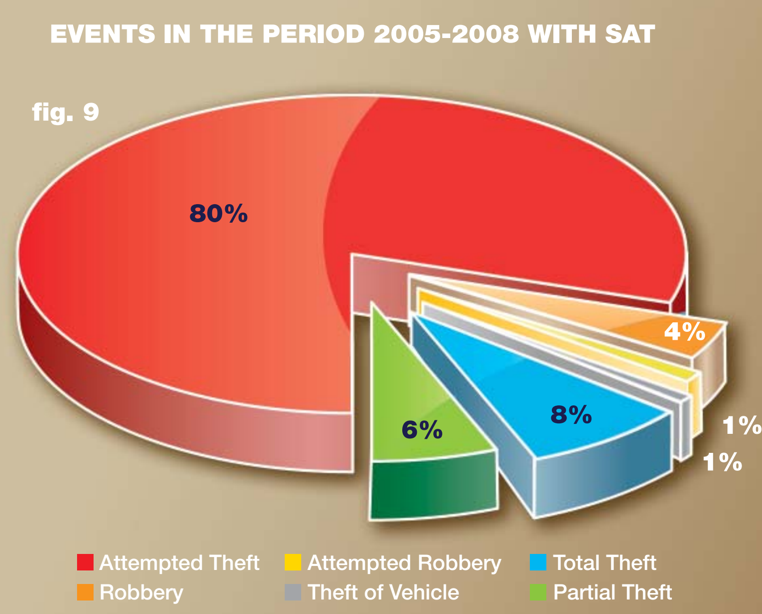


figure 9

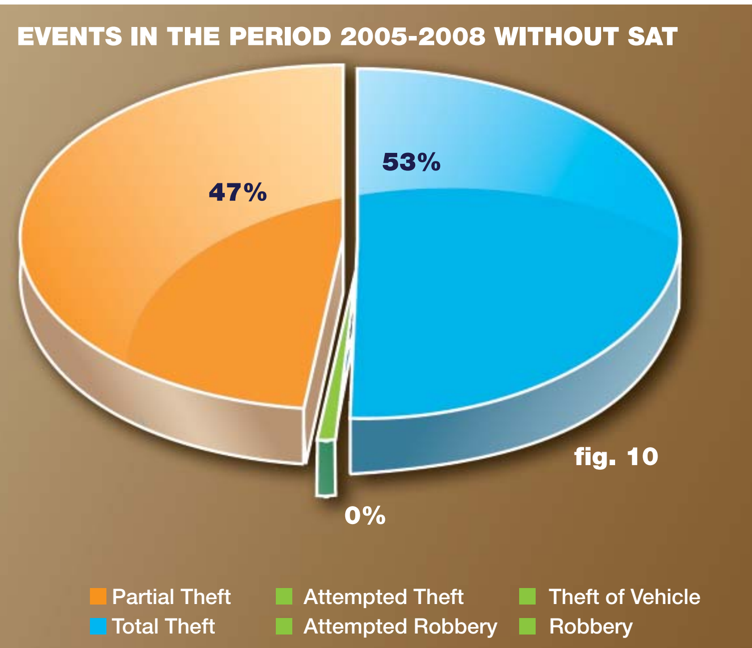


figure 10

damage. In this last case, as was previously observed, the partial damage is of a greater entity with respect to the similar partial damage suffered by vehicles equipped with satellite radiolocalization systems.

Romano Lovison

Facility Management: a **primary analysis** of the segment of **integrated services** companies

Introduction

This brief study we present on Facility Management represents the first attempt to quantify a phenomenon that is growing constantly.
If on one hand the difficulties encountered in gathering data have limited the possibilities of exploring them, on the other hand they highlight the importance of conducting quantitative and qualitative analysis of this sector.

Methodological note

Let us try to summarize what reasoning led us to the estimate that we present. First of all, we highlight that the number of firms and workers involved has prevented the direct use of data that can be gathered from sample national survey databases such as, for example, the Quarterly Survey of the Labour Forces conducted by ISTAT.
As regards the possible use of the data from the latest census of companies and services in Italy, which dates from 2001, in consideration of both its age and of the updating of the ATECO classification that was made in 2007, it was not possible to proceed with an analysis over a period of time covering several years.
For all of these reasons, we opted to use the data (2007) gathered from several sources such as ASIA and INPS.
In addition to this first difficulty in the comparability of the data, there is also a second problematic aspect: the companies that provide a service of unarmed safekeeping and guard-houses do not necessarily perform these services as their primary activities; on the contrary, the diffusion of the “global” approach to the service makes it more and more complex to identify the confines between the various activities of facility management. In particular, we confirmed the existence of significant company divisions dedicated to the service in question in companies of differing types. We tackled this problem by orienting ourselves towards the identification of a numerical relation between the various company divisions, an aspect on which the first phase of our work was based. By means of direct contact with assorted companies in the sector, throughout the national territory, we observed that the safekeeping and guardhouses division impinges on the balance sheet for roughly 15% (average) of those companies that carry out, primarily, generic non-classified services. Given that almost the entirety of the expenditure of these companies is represented by labour costs, we applied this ratio to the number of workers of the multi-service companies which, in the ASIA database, resulted as providing the safekeeping service integrated with other services. A similar course of action was followed for the companies that resulted as having a specific primary activity, first of all, cleaning services. The number of these companies and their conformation did not, however, allow us to reach a univocal coefficient, as was the case for the others. As we shall see later, the tables in fact lack a certain number of workers for which the reasoning can only be approximate and the identification of a number, which is statistically useful, must be deferred to other occasions of research. The final group of workers we concentrated on, those in companies that carry out the service in question as their primary activity, was gathered by excluding “armed safekeeping” workers from the total of those working in the safekeeping division (armed and unarmed); this number was, for obvious reasons, easily identified.

Last of all, for the correct interpretation of the data, it must be borne in mind that, as we are dealing with an estimate, we were not able to account for some peculiarities in certain regions owing to the excessively small number of workers provided for us by ISTAT, a number which made our method inapplicable.

The data presented

In the following summary table (*tab. 1*), data of various kinds are present. The first column is dedicated to the companies that carry out, as their primary activity, a specific service, for example cleaning, into which they integrate the safekeeping and guardhouses service. As we attempted to say above, owing to the variety of these companies it was not possible to identify a useful coefficient like that described for the companies providing generic integrated services (numerically residual); we would only have been able to attain this end by conducting ad hoc research, contacting a large number of firms. Whereas with the data in our possession, we concluded that on average the safekeeping and guardhouses service impinges on the firms in question for a percentage that ranges from 5% to 10%. Applying an intermediate estimate (8%) to the INPS data in our possession (2007) for workers in cleaning firms more often involved in Facility Management activities, we arrived at the hypothesis that the

REGION	Workers in companies with specific primary activities	Workers in companies with generic Integrated Services	Workers in safekeeping and guardhouses companies	Total workers	Companies involved
Piedmont	-	79	1903	1982	86
Valle d'Aosta	-	-	14	14	3
Lombardy	-	161	8191	8352	291
Trentino-Alto Adige	-	-	250	250	14
Veneto	-	22	2302	2324	84
Friuli Venezia Giulia	-	-	593	593	31
Liguria	-	2	1421	1423	47
Emilia-Romagna	-	36	2363	2399	95
NORTH	**-**	**300**	**17037**	**17337**	**651**
Tuscany	-	61	3257	3318	98
Umbria	-	-	342	342	21
Marche	-	1	481	482	27
Lazio	-	395	8066	8461	191
CENTRE	**-**	**457**	**12146**	**12603**	**337**
Abruzzo	-	2	677	679	56
Molise	-	-	139	139	8
Campania	-	46	5705	5751	203
Apulia	-	54	3630	3684	207
Basilicata	-	-	704	704	22
Calabria	-	-	943	943	39
Sicily	-	86	4293	4379	129
Sardinia	-	1	2290	2291	74
SOUTH and the ISLANDS	**-**	**189**	**18381**	**18570**	**738**
TOTAL ITALY	**30000***	**946**	**47564**	**78177****	**1726**

Table 1: series of data for workers and companies involved.

* *reference is made to that which was stated above for the estimate of this datum.*

** *the sum is given by the total of workers in the column in addition to the total of the first column.*

safekeeping and guardhouses service may count on around 30,000 only for this type of company.
In the second and third columns, on the other hand, we find the numbers of the workers in companies that carry out, respectively, generic integrated services, inclusive of safekeeping, and the workers in companies that carry out safekeeping and guardhouses services as their primary activity. On the basis of these series of data we see, in the fourth column, the total of the workers and in the fifth column, the number of companies involved. As regards the fifth column, it should be specified that the total of the companies takes into account only those companies that are definitely involved, thus with the exclusion of cleaning companies etc. from the total.

Our estimate is that there are approximately 78,000 workers in the safekeeping and guardhouses service sector in Italy. The figure we propose, despite having been difficult to deliberate, does not seem to deviate too much from the orders of magnitude that can be gleaned from the Quarterly Survey of the Labour Forces conducted by ISTAT. In fact, despite a sample investigation being unsuitable for this type of research, as we have specified, we observe that the number of workers that correspond to the category of “Qualified professions in the services of security, surveillance and safekeeping”, minus the number of workers in the various sectors comprised in this group, results as being around 90,000 units (ISTAT 2008), a figure that is still “contaminated” by professions of which it was not possible to identify the weight. Furthermore, cross-referencing the variable dedicated to the profession of Italian workers with the categories of companies (cat. 12 in the database), we observe that the workers employed in companies that carry out activities of “services to companies and other activities” are (in 2008) approximately 67,000.

Returning to our data, that which results as being immediately evident is the non-uniform distribution of companies and workers among the

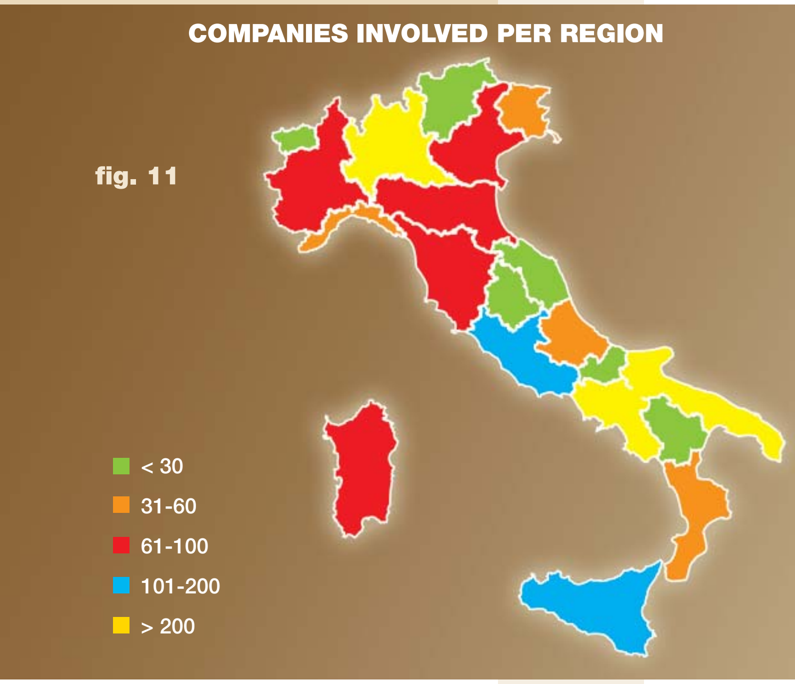


figure 11

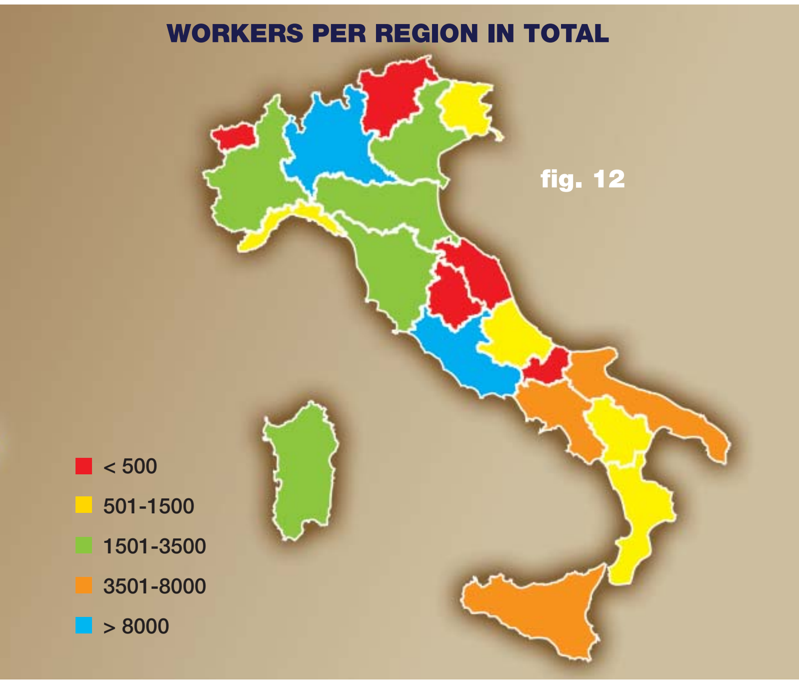


figure 12

various regions, an element that seems to be consistent not only with the varying weight each territory has in terms of population, but evidently also of recipient structures of the safekeeping and guardhouses service. It is no coincidence that the regions most concerned numerically are Lazio, Lombardy and Campania, which alone account for almost half of the workers and the companies, respectively, estimated as 22.564 units and 685 firms.

In the following figures we see the projections of the data summarized in table 1, in particular of those data for which it was possible to obtain the territorially broken-down value.

Conclusions

We have seen that, in spite of the difficulties encountered in our work, the estimate of 78,000 (approximately) workers in the sector is not too far removed from those orders of magnitude indicated by the manipulation of other data. This does not mean that our estimate is the best that may be made: the fork is still wide, but it may certainly offer a fair indication for an in-depth analysis of a sector whose growth does not seem to be disputed.

Our contribution is thus intended to be not just a tool for future investigations, but also a stimulus for the implementation of analyses that may highlight various aspects, also by means of different approaches. We are thinking, for instance, of the possibility of reconsidering our coefficients on the basis of the ratios of the economic loads that the various activities hold in public competitive tenders. We are thinking of the possibility of conducting investigations that are even more qualitative, which focus on the contents of the service and not merely on numbers. There are many possibilities for analyses and points of view that can be used, for a sector that is all but unexplored such as that of Facility Management, and, as far as we are concerned, we hope that our contribution will go in this direction.

Mrs Angela Vagni

WORKERS INVOLVED PER REGION IN MAINLY GUARDHOUSE COMPANIES

figure 13

WORKERS INVOLVED PER REGION IN COMPANIES WITH INTEGRATED SERVICES

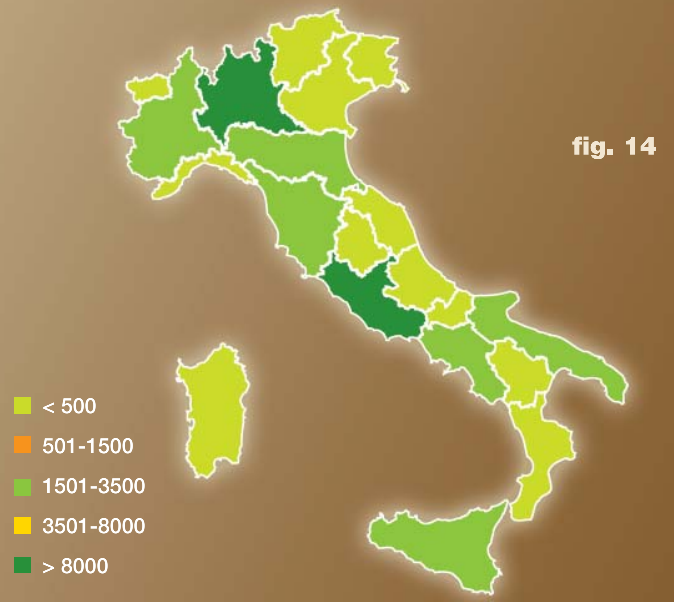


figure 14

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