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STATE OF ACCESS CONTROL:

Increased demand leads to convenient, easy-to-use, real-time solutions

By Kenneth Z. Chutchian

THE ACCESS control industry has demand, supply and urgency as the world confronts relentless security threats. Homeowners, businesses, and governments do not know how safe they are, even as they seek the best available information. Welcome to our annual state-of-the-industry report for access control systems.

“Cybersecurity is a major concern for organizations,” said Sebastiaan van Ineveld, product market manager for Genetec, Inc. “The market is asking for secure access control solutions that can withstand increased security threats. We’ve seen an increase in the security of modern IP-based access control solutions. This includes increased encryption levels and the adoption of more secure technologies.” As examples, van Ineveld referenced “the well-known 125 kHz prox” and magstripe cards getting swapped out for stronger encrypted and multi-faceted 13.56 MHz cards.

“Further up the chain, more advanced encryptions are also used,” he said. “The newest TLS [Transport Layer Security] encryption levels are now standard, and modern access control solution vendors provide choices for data storage to address privacy concerns and legal requirements.”



Sebastiaan van Ineveld

active technologies are solutions that work like enterprise applications – they’re cloud based with open APIs that integrate into the stack as necessary to create that seamless experience. They mix with smart systems that encourage environmental conservation and use advanced artificial intelligence and mobile technology to predict and analyze trends and allow for easy one-touch access from anywhere, anytime.”

Industry experts have plenty to say about Access Control as a Service (ACaaS) and the role that cloud-based access control services have on the increased demand for ACaaS solutions.

“I would have to say the one single item that both the provider and the end user would agree on would be limiting the impact on the IT staff and the support that is required from them,” said David Fogle, field support and national training engineer for Napco Security Technologies. “A cooperative relationship needs to be built between the security provider and IT to define roles and responsibilities, and (then) they will get at the root of one of the issues ...”



Mary Clark

Fogle stressed that operations and management of an access control system are not a natural fit for IT departments. “There are cloud-based solutions that do not require any inbound connections, whereby firewall adjustments need to be made but make a secure outbound connection to the host ... users access the host via a browser interface and offer a secure solution and no dependency on IT or pose the same risk that open ports can on a network firewall.”

TECHNOLOGICAL ADAPTATIONS

Mark Hillenburg

Other industry experts weighed in on the most active access control technologies in the market today.

“The most active access control products today are still the same old ones that have been used for many years,” said Mark Hillenburg, vice president of industry relations at Digital Monitoring Products. “Although OSDP (Open Supervised Device Control) has made a vast improvement over the legacy WIEGAND (one-way) technology, its adoption is not moving as fast as it could. Old habits die hard, I guess ... However, we do see that mobile credentials are starting to gain interest and it looks like they have a strong future.”

Mary Clark, chief marketing officer at Brivo, said the pandemic’s impact on the workplace still drives technological adaptations and will continue to do so for the foreseeable future.

“Hybrid work, health and safety protocols, the increased shift to shared spaces and flex spaces drive an exponential growth in smart place solutions,” she said. “The most



David Fogle

CLOUD-BASED SOLUTIONS

Maureen Carlo, global director of strategic partnerships at Arcules, noted that organizations, out of necessity, are looking to adopt more convenient, flexible, and scalable security solutions. “The wide acceptance of the cloud across various business functions has caused considerable transformation and has shifted the ‘on-premises is best’ mindset,” she said. “Cloud-based access control offers a variety of benefits. Not

only does it provide robust, real-time management, but it can also be wholly integrated with third-party systems to

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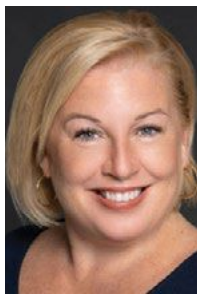
STATE OF ACCESS CONTROL

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help mitigate and limit risks within the company. “

Brad Kamcheff, marketing manager at Aiphone Corporation, cited the need for immediate visibility as to who is at the office door, school vestibule, or gated warehouse entrance. This entails on-demand access to the systems used by access control customers. “Cloud solutions make this possible because the data and records from these interactions can be housed in the cloud and do not need to rely on an on-site server,” Kamcheff said. “As a result of this ease of use and simplicity, customers are looking to invest in solutions that enable them to readily access video, reports, and general data regardless of where the person is located.”

SYSTEM UPGRADES



Maureen Carlo

What about upgrading an organization’s access control system? What do customers look for – convenience, touchless capabilities, better integration with enterprise systems, or something else?

Sebastian van Ineveld at Genetec, Inc. tackled the upgrade question point by point.

“A unified platform that covers the whole physical security environment in one single solution,” he replied. “Our customers mention that they specifically look for our unified platform for access control, video surveillance, and license plate recognition.

“Organizations want to have the freedom to choose hardware depending on their preferences and needs,” van Ineveld added. “They also want to have the flexibility to scale their access control system up or down, depending on their business decisions.”

He continued. “Organizations look for vendors that offer the latest cybersecurity technologies, adhere to the most recent security standards, and are transparent about potential vulnerabilities.

“They (organizations) are looking at forward-thinking vendors that can help them on that journey of interconnectivity, cloud adaptation, and advanced security use cases. This requires close collaboration between the end users, systems integrators, and access control vendors, and continuous investment in R&D from the solution providers.”

Mark Hillenburg at DMP offered his take on what customers are looking for when they want to upgrade their access control systems:

“Almost always they are looking for better integration with enterprise systems,” he said. “These integrations with Active Directory or other HR or IT infrastructure saves



Brad Kamcheff

them time and money to manage the users. The other aspects Frictionless interfaces for users are becoming more important but saving the administrators – who are paying for the upgrades in many cases - time and money.”

CRITICAL ISSUES

Security experts interviewed by SSN addressed other critical issues regarding the state of the access control industry, including the progression of biometric technology, QR codes and automatic license plate recognition systems.

“Biometrics offer increased security and authentication and access control providers have integrated with biometric providers to enable this additional security,” said Mary Clark at Brivo. “Facial recognition technology with video surveillance has benefits but also raises apprehension. At Brivo, we track these concerns and ensure our solutions take this into consideration.”

“During the past two years, physical access control systems have come under never-before-needed requirements, and at a time when security for employees and the retention of employees has never been more important.”

—Mark Hillenburg, DMP

David

Fogle at Napco noted that over the past 10-15 years, “Each of these technologies (biometrics, QR and automatic license plate recognition) are still credential/reader relationship components in an access control system. Each has brought adoptions of access control to new installations, providing new methods to process entry requests.”

A recent survey by a widely respected industry consulting firm showed a 10 percent decline in customer belief that their physical access control systems met or exceeded expectations. At least one industry insider sees opportunities in that cautionary report.

“I’m guessing that during the past two years physical access control systems have come under never-before-needed requirements, and at a time when security for employees and the retention of employees has never been more important,” Hillenburg said. “I can see how this would be a perfect storm for the delight in your system to wane. It’s an opportunity for clever service providers and access control manufacturers to find out what end users are needing and to fill the deficit in functionality or at least the perception of inadequacy.” **SSN**

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ACCESS CONTROL MARKET REPORT:

Technology, increased cyber awareness among factors fueling market growth

OVERALL, THE access control market, in the U.S. and globally, has been on the upswing for years. Industry experts predict the market will continue its ascent for the foreseeable future, with a couple of “caveats.”

Nobody can predict the impact of a possible pandemic resurgence. But even COVID-19 complications in the supply-demand equation resulted in a decline in growth, not a stall or a suspension in growth, according to MarketsandMarkets, a growth consulting and program management company.

With the pandemic not quite in our rearview mirror, the access control market growth was valued at \$8.6 billion in 2021. The growth should reach \$13.1 billion by 2026, with a compound annual growth rate of 8.7 percent between 2021 and 2026, market-sandmarkets.com reports.

Similarly, Emergen Research, a market research and strategy consulting company, says: “The global access control market size was at \$8.58 billion in 2021 and is expected to register a revenue of 7.8 percent during the forecast period.”

Why such confidence? Emergen cites increased adoption of wireless access control systems, growing usage of IoT-based security systems, the increasing number of terror attacks and cyberattacks globally, and rising demand for Access Control as a Service as important factors driving market revenue growth.

Meanwhile, MarketsandMarkets attributes much of the access control market growth to growing awareness of home security systems, ongoing technological advancements and increasing deployment of wireless security systems.

Emergen elaborated on the game-changing development of wireless security systems. “If there is absolutely no wiring, installers can work more productively and conserve over 60 percent of their time and money. Wireless electronic access control systems are a fantastic addition or replacement for low-security non-networked and wired electronic access control systems for businesses. In addition, increasing adoption of wireless access control systems is driving market revenue growth.”

IMPOSING DYNAMICS

Studies and assessments of access control markets take into

account innumerable factors and scenarios, leaving private businesses, government agencies and homeowners faced with similar problems found in Economics 101: what is the opportunity cost of our decisions?

Access control markets present end users, integrators and installers with imposing dynamics to consider, according to MarketsandMarkets: an increasing number of terrorist attacks and organized crimes on a global level; unauthorized access and data breaches in an access control environment; gradual implementation of mobile-based access control; the emer-

gence of biometric reader technology; and the challenge of overcoming less awareness among users about the availability and benefits of advanced security solutions.

For prompt and effective real-time response during terrorist attacks and other criminal activities, “the use

of smart cards, biometric devices, and electronic devices for enhanced security and authentication plays an important role in providing improved security and safety to commercial, government, industrial and residential sectors,” MarketsandMarkets notes.

The increasing interconnectivity of a rising number of devices for sharing and collecting data works out great for innumerable individuals, government agencies and businesses. But it is also a problem for everyone because it “increases the number of vulnerabilities within a system significantly,” MarketsandMarkets reports. Government agencies, data collectors and hackers may get unauthorized access to critical information while in transit, compromising an individual’s privacy, presenting a security threat, and increasing the risk of cyberattacks.

Industry experts predict that biometric-enhanced mobile devices will improve the level of security in various applications, including authentication systems for access credentials. Biometrics, which helps identify a person’s physical characteristics to provide “controlled physical access” to an infrastructure, has seen increased usage in government buildings, manufacturing units, power stations, defense industry settings, and private company facilities and headquarters.

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That's a lot for integrators, installers, and end users to process. Recognizing this, MarketsandMarkets warns about "less awareness among users about availability and benefits of advanced security solutions."

"To increase user awareness, companies need to participate in conferences and exhibitions, making people aware of the benefits of advanced security solutions," the market research company noted.

GROWTH AND OPPORTUNITY

A study of global markets – where various regions have their own security concerns and user awareness dynamics – shows growth and opportunity in the access control industry.

"The Asia-Pacific market is expected to register a robust revenue growth rate" over the next several years, according to Emergen Research. "Increasing government initiatives to promote cheap manufacturing of electronic goods and growing usage of IoT-based security systems are factors contributing to market revenue growth," the group reports.

In November 2020, Japan's Ministry of Economy, Trade, and Industry unveiled the Internet of Things Security and Safety Network, addressing security precautions for IoT devices and connectivity. Recently in India, the secretariat of Kerala, a state of India's situated on the tip of the mainland's southernmost coast, installed an access control system implemented by Keltron and Kochi Metro Rail Unlimited. The system will be connected to a biometric attendance system which contains information about current personnel. "Such initiatives are substantially driving revenue growth of the (access control) market," Emergen reports.

Predictably, Europeans take access control security systems seriously, which is good news for market expansion.

The United Kingdom Data Service, a government agency, sets multiple levels of data access. Users must register to access protected data under end user license and their consent to various terms, including prohibition on disclosing any identifying or private information of people, households, or organizations – as well as prohibition on using data to seek information pertaining to an identifiable person.

"The European Union is deploying massive and complex biometrics in the world," according to Emergen. "A land, sea and air entry-exit system made up of thousands of face and fingerprint biometric kiosks will secure (the European passport-free) Schengen area." Additionally, all foreign nationals wishing to leave the Schengen region will be required to provide finger and facial biometrics to the system. The data will be acquired at land crossings, seaports, and airports and will be accessible to all "pertinent" government agencies.

Closer to home, the North America market is projected to account for the world's largest revenue share over the next few years due to rising demand for Access Control as a Service and government initiatives targeting cyber-security attacks and data breaches. "To update (the United States) approach to security, federal agencies and their suppliers are particularly urged ... to accelerate transition to secure cloud services and deploy a zero-trust architecture," the Emergen Research report states.

INCREASED REVENUE OPPORTUNITIES

In its market status report, Emergen reiterated the critical nature of access control and acknowledged the diverse needs of businesses, governments, and homeowners: "There is (always) risk of error as access control design decisions must be decided by humans rather than by technology."

Although there is some evidence that the access control market actually experienced revenue shrinkage in 2019 and 2020 (as reported by James Moore, Editor of IFSEC Global), there is no doubt that worldwide security needs and complex security threats are driving a robust return to increased revenue opportunities everywhere.

Moore notes that "Our 2020 State of Physical Access Control Report found that 51 percent of (survey) respondents believed their current system either met or exceeded their requirements. Just two years later this figure dropped to 41 percent."

However, Moore added, "Industry analysts from Omdia estimate that the global market for physical access control equipment was worth \$5.6 billion in 2020, with growth predicted at 7.3 percent to 8.07 percent compound annual growth rate (CAGR) in 2025." **SSN**

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For larger traditional integrated access & security systems, NAPCO Enterprise Systems, such as the Company's Integrator-Direct, Exclusive CA4K, combines the security management of video, alarms, locks, readers and mobile/BT credentials, cell/IP communications, access control, threat-level- and visitor-management— simply scalable from a few doors to thousands. NAPCO is an ISO9001:2000 Certified manufacturer of quality products engineered to exceed industry standards; to be long lived and feature the lowest total cost of ownership & industry's longest warranties. Local & Online Trainings for all are available – For More visit <https://NAPCOsecurity.com/products/access-control/> or call 1.800.645.9445



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