

euralarm

for a safer and more secure Europe



ANNUAL REPORT 2023-2024



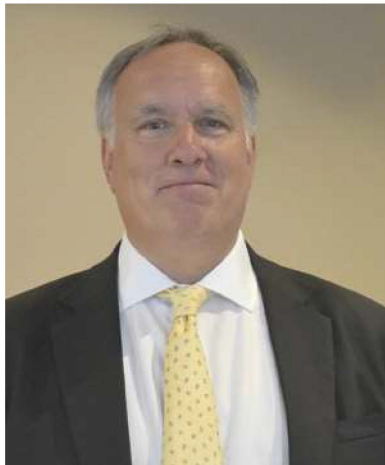
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Letter of the President

Euralarm: stable partner
in changing times"



Jon Könz
Euralarm President

Dynamics, a high willingness to change and an open mind. These 'ingredients' are of vital importance for every organisation that is active in the fast-changing environment of the fire safety and security industry. The recent years proved that Euralarm has excelled in adapting to change. Our organisation has evolved towards an association with sections that are optimally positioned and equipped for the future and with a professional team that acts as both a driving and supporting force for our activities. Even the role of president changed. Looking back, I can only say that it has been an extraordinary and stimulating experience and that I enjoyed the voyage toward achieving our goals.


In parallel with these changes, we also introduced the Euralarm Executive Advisory Council. An important body that also more explicitly involves the management of member companies and associations in Euralarm activities and ties them to the goals of our association. In reverse, the input of European industry management also provides an important framework for future activities. It has brought a whole new dynamic to our organisation. What recently started as a request from the management of our members has already evolved into a new structure that drives changes and opens new discussions with new and different views. I am sure that the structure that we created will further develop. Together with our position in the Industry Advisory Board of CEN CENELEC we created an environment that allowed us to better absorb the external developments and provide us with more visibility. Also last year, the trend towards horizontal standards continued. Developments like the Green Deal and the increasing importance of sustainability and the

renovation wave presented new challenges for finding and sharing information on these topics.

Meanwhile the new Data Act, Cyber Resilience Act, the AI Act, and other developments that are driven by digitalization caused a completely new dynamics, with members providing their own specialists in these fields. It resulted in more of our members getting actively involved in technical committees and working groups. With the help of our Professional Team, we have been able to provide sufficient feedback to the Commission and thus represent the interests of our industries. It has also given us the opportunity to tighten the ties with other associations that are also facing the implications of this development.

In brief, thanks to our members and section chairs we have evolved into an organisation with a wider and more open scope that can look forward to a broad interest from companies. That is reflected in our new Strategy 2024 - 2030 that will be presented to the new members of the European Parliament this year. It is a valuable document with an even more valuable challenge: to achieve the objectives it sets out. Together with our members and our Executive Advisory Council, we will work towards this in the coming years.

Two of the strategic topics I would like to highlight in this regard is the Europe-wide testing and certification and a more flexible standardisation system. Can we do things differently? The standstill in fire safety standards for building products should lead ourselves to question if we do it right. Our goal is to have Europe-wide standards. That means that we need to move forwards. Euralarm is to be at the forefront of this. For a safer and more secure Europe!

A handwritten signature in black ink, appearing to be 'K. J.' with a stylized flourish below the 'J'.

Letter of the General Director

"2024: Managing Change"



Paul van der Zanden
Euralarm General Director

In 2023, the world witnessed several significant changes across various spheres, reflecting the dynamic nature of global affairs. One notable area of transformation was the continued advancement and integration of technology into everyday life. The proliferation of artificial intelligence (AI) and automation continued to reshape industries, revolutionizing processes, and workflows. This trend leads to both opportunities and challenges, the concerns around available workforce in our industry will potentially have to be countered by increased efficiency, automation, and innovation. Environmental issues took center stage in 2023, with a growing recognition of the urgent need for action to address climate change and biodiversity loss.

The United Nations Climate Change Conference (COP29) saw renewed commitments from nations to reduce greenhouse gas emissions and transition to renewable energy sources. Climate-related disasters, such as wildfires, hurricanes, and floods, underscored the pressing nature of climate change and the need for coordinated, global responses. A lot of these changes will impact our industries and drive innovation to keep Europeans safe and secure going forwards.

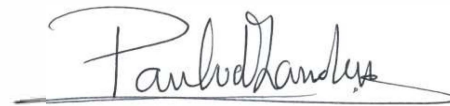
The increased focus for Domestic Life safety is fueled by the fact that in the coming years, Europe will face other significant challenges posed by shifting demographics, as an increasing number of individuals will depend on systems and services to manage healthcare and provide a safe place to live for the aging population. As we prioritize the maintenance of a secure and safe environment in

terms of fire safety and security, there arises an opportunity for our industry to also contribute to ensuring a safe domestic environment that encompasses broader aspects of well-being.

If after the European elections the European Parliament were to make a major shift, together with the upcoming Presidents elections in the US and the increasing role from China as a global economy and technological powerhouse it is more than ever important that we have as Fire Safety and Security Industry a strong voice and message to manage the impact of the changes which are outside our control. A strong European representation of our industries as well as cooperation with other European and National associations in our domain will help to better manage these changes.

On the standardization side 2023 has been a year of challenges. Harmonized standards within the EU are likely to evolve in the future due to several factors. Firstly, advancements in technology and industry practices necessitate updates to standards to ensure they remain relevant and effective. Additionally, changes in regulatory frameworks and directives may prompt revisions to (harmonized) standards to align with new requirements. Moreover, emerging challenges such as cybersecurity threats and environmental concerns may necessitate the development of new standards or the adaptation of existing ones. With the changed rules on writing harmonized standards and citation in the Official Journal we have to look at our industry how we can ensure that our products and services will stay up to date and meet the functionality and quality they are made for.

A big thank you to all our Euralarm members, delegates and the professional team for their invaluable support and hard work throughout 2023. Your commitment and contributions have been instrumental in achieving our collective goals. As we navigate the challenges ahead, we encourage you to remain or become actively involved in Euralarm. Together, we can continue to address and overcome the obstacles we face, keep Europe safe and Secure and ensure a prosperous future for all. Thank you for your unwavering dedication, and we look forward to your continued engagement and collaboration in the coming year.

A handwritten signature in black ink, reading "Paul van der Sandt". The signature is written in a cursive style with a long horizontal line underneath.

Who we are

Founded in 1970, Euralarm represents over 5000 companies within the fire safety, extinguishing and security industry, providing leadership and expertise for industry, market, policy makers and standards bodies. Euralarm members are national associations and individual companies from across Europe. Our members make society safer and more secure through systems and services for fire detection, access control and video monitoring.



Euralarm in figures



European companies
in our sectors employ
700.000 people



We represent a
€69 billion market



An 11% market
growth expected

Welcoming new members

One of Euralarm's objectives is to provide an open, transparent and equal platform for members of all sizes, including by monitoring trends in European and global markets, informing members and promoting action where appropriate. This year we can welcome:

- AddSecure
- Critical Business Solutions
- Detectortesters
- Exxfire
- Hertek
- KEC Fire



Our structure

The Euralarm Board consists of: the President of Euralarm, the Chair and Vice-Chair of the Euralarm Sections, as well as the Chair of the Committees. For an overview of our organisation [click here](#).

Euralarm Members

For a complete overview of our members, [click here](#).

Extinguishing Section

Taking action to guide, influence and improve technical and political trends.

The Euralarm Extinguishing Section, covers existing, new and emerging active technologies involving automatic extinguishing systems, oxygen reduction systems, portable equipment and firefighting agents.

The section is monitoring the technical, political trends and take action to guide, influence their development and improve them. Working together with a diverse number of stakeholders in Europe, we collaborate on finding solutions for today's as well as tomorrow's challenges for fire safety in a digitised world. Currently 18 national associations and companies are members of the section. Some of last year's highlights are presented here.



Standardization and regulations

The section provided its members quarterly updates on all relevant EN/ISO standards affecting extinguishing systems.

Together with other stakeholders, the Extinguishing Section provided a detailed response to the public consultation on the ECHA General Restriction Proposal (PFAS), and continued to monitor and inform its members on the development of the F Gas Regulation revision.

Publications

During the last year the Extinguishing Section released a number of publications:

- Euralarm guidance document on anticipated changes to the next edition of EN 15004-1, in 3 languages
- New Euralarm guidance on approved fill stations of clean agent systems, in 4 languages
- New Euralarm guidance on maintenance of condensed aerosol fire extinguishing systems, in 4 languages
- Updated versions of Guideline on Periodic testing of transportable gas containers, in 4 languages
- PFAS Fact sheet, in 4 languages

Events

During the last year, the Extinguishing Section organized 4 section meetings (2 of them face to face), each with high level of attendance. As part of the ongoing sharing of knowledge, the Extinguishing Section organized public webinars on fire safety solutions for lithium-ion batteries in both French and Spanish in 2023.

Liaison

Euralarm and the US Fire Suppression System Association (FSSA) have signed a Memorandum of Cooperation. The reciprocal cooperation will focus on education, research, service, and other related activities in the domain of fire safety. The section also continued participating in the Insurance Europe's Prevention Forum on standards for fire protection systems and maintained an active liaison with the European Fire Sprinkler Network (EFSN).

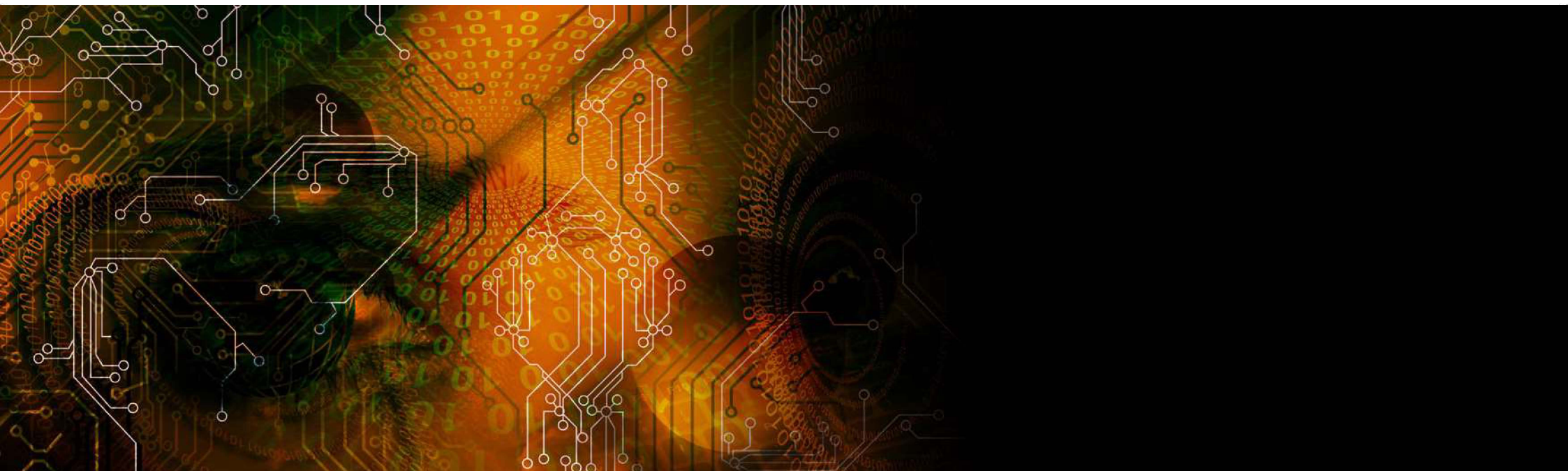
The Extinguishing Section welcomed a new Technical Manager, Carlos Perez, who is a shared resource with the Fire Section, and will succeed Michael Scharnowsky who will take well-earned retirement.

Fire Section

The Euralarm Fire Section promotes the protection of people, property and environment from fire, thereby contributing towards a fire safe environment for society.

We monitor the technical and political trends and take action to influence the developments. Currently 27 national associations and companies are members of the section.

In the past year, the Fire Section extended its scope. Video Fire Detection and Thermal Video Fire Detection are now part of the section's work program and a new Task Force (TF VFD) started to prepare suggestions on actions bringing the technology into to European-standards or bringing up rational why European standards are not needed. Another initiative of the Fire Section is the Task Group Environmental Sustainability.



It started in 2023 as a new cross-sectional task group that is led by the Committee Horizontal Compliance.

Standardization

The section provided its members frequent updates on all relevant EN/ISO standards affecting fire detection systems while maintaining an active liaison with several Technical Committees in CEN and ISO.

Certification of Fire Detection Products and Systems

By starting a new Task Group Certification (TG CERT), the Fire Section is aiming to consider alternative new pan-European certification routes, with keeping in mind "Full support of free/easy trade in Europe" and the Euralarm-Strategy of "CE-Marking with one stop testing + multiple quality mark". The section also continued to maintain an active co-operation with EFSG (Association of certification bodies in Europe) and with the European Group of notified bodies (GNB) sub-group SG07 on fixed fire-fighting equipment.

Construction Products Regulation

The Fire Section kept on working on the Construction Products Regulation (CPR) and its Acquis- and Revision-processes. By doing so, the section is keeping a good overview on everything which is ongoing. The Task Force (TF) NLF also continued

its work and is now focussing on primary task comparing the options for providing hENs under the CPR Acquis process. TF NLF also prepared a neutral comparison of approaches for decision in the Euralarm Advisory Council. As part of our CPR work the section also maintained an active collaboration with ORGALIM CPR TF.

Domestic Life Safety (DLS)

The Fire Section's sub-group on domestic life safety (TG DLS) became more of a cross-sectional group in Euralarm and it held joint meetings with sections Security and Services to de-fine the route going forwards on residential applications, as well as on some standardization activities in CENELEC TC 79. With domestic fire safety getting more attention from European stakeholders and policymakers the TG DLS organized a webinar about domestic fire safety end 2023 and co-operated with EFSA and CogDEM on the program of a European Smoke Alarms Day in November 2023.

The Task Group is now working on new the EU Battery Regulation and its consequences for Smoke- and CO-Alarms (exchangeability of batteries now required in addition). There was further success for the initiative of this Task Group to start the new CENELEC/TC 79 WG18 on Domestic Hazard Warning Systems / TC79 WG18 as of early 2024.

Publications

The Fire Section's TG DLS published a white Paper "Enhancing Domestic Life Safety" in 2023 while 24 different Country Fact Sheets about fire standard acceptance in several countries in Europe and in the world were made available on the website and in MS-Teams members area.

Events

During the last year, the Fire Section organized 4 section meetings (2 of them face to face) and a public webinar on Domestic Life Safety in Oct 2023.

Security Section

Driving standardization and strengthening the industry through cooperation.

One of the most important topics the security section deals with is standardization. The section undertakes efforts to ensure that European security equipment and system standards meet the requirements of Euralarm members.

Standardization

Euralarm feeds the plenary of the CLC/TC 79 with their views on the evolution of the sector and the needs for new/revised standards. Outcomes of the plenary and information on progress in different standards have been shared with the members.



As far as the overhaul of EN 50131-1 is concerned Euralarm reinforced the lead in drafting the new version by summarising the conceptual approach and providing the first proposals for the new text. Following that Euralarm became the drafting sub-group recognised by WG1 by opening the drafting sub-group to non-members. The WG1 members then provide comments to the Euralarm text proposals. This new working method will significantly help in accelerating the revision process.

Last year Euralarm got chairmanship of the IEC/TC 79 thanks to the support of the German members of Euralarm and the collaboration of the Belgian National Committee. This step stimulates tight coordination with CLC/TC 79. Within the TC the recommendation was discussed and published to avoid international Building Intercom Systems standards entering in conflict with the provisions of European standards on Intruder and Hold-up Alarm Systems

New Task Group

In the past year the Security Section set up a new Task Group Video Surveillance Systems. This new Task Group will exchange on VSS practices in countries and monitor the VSS standards development from IEC/TC 79. Joint meetings with the Services section allowed optimisation and coordination on many standardisation topics related to security systems, services standards, and cybersecurity and on the transition to cloud services.

Regarding the PSTI Cybersecurity Regulation in the UK the section provided an explanation to the members and discusses with members on the scope and conformity assessment.

Monitoring developments

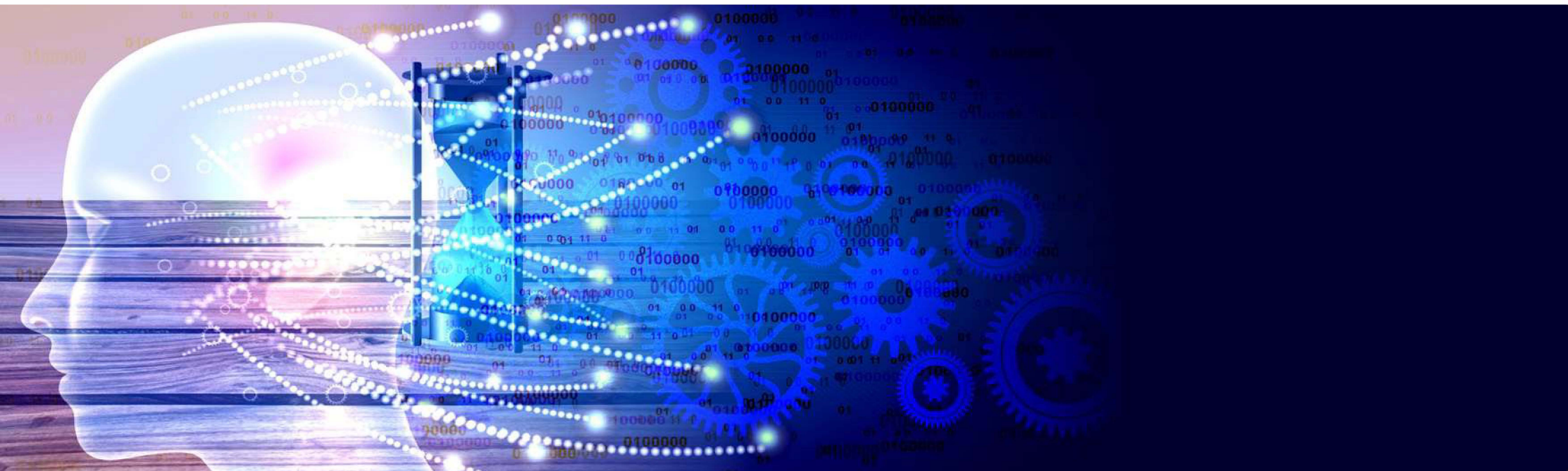
To keep members up to date the activities of Horizontal Compliance Committee, TG Cybersecurity and the new TG Environment and Sustainability have been monitored while these groups were also fed with the Security Section's perspective regarding Delegated Regulation on cybersecurity and privacy under the Radio Equipment Directive and the related standardisation activities and the preparation of the Cyber Resilience Act and the consideration of alarm systems as Important Products Class 1, concerns about mandatory replaceable batteries and lead restriction under the new Battery regulation, the future restriction on PFAS and the revision of EMC standard.

Services Section

Digitalization driving the service market.

Digital data, artificial intelligence, next generation networks, remote services, and cyber security - when it comes to digitalization the Services section of Euralarm is at the forefront of the developments. By monitoring these emerging technologies and identifying the possibilities these technologies offer to our members and challenges they bring to the market, the Services section facilitates innovation.

Last year the members of the Services Section exchanged views on "Who are the competitors of tomorrow?" to identify action points for the future. It is important to raise awareness and promote professional services, standards open to innovation,



keeping and attracting talents, etc. In 2023 the Services Section also initiated a new drafting group for guidance on contracting cloud services. Joint meetings with Security section allowed optimisation and coordination on many standardisation topics related to security systems, services standards, and cybersecurity.

Monitoring developments

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Data Act

The Services Section monitored the trilogue between the co-legislators and the impact of the modification for the members, especially regarding the mandatory sharing of data with third parties and the possible exemption for data generated by security systems, and will be publishing guidance for members on this subject. The section also monitored the guidance in preparation by the Commission's Expert Group on B2B data sharing.

Artificial Intelligence

The Services Section also monitored the trilogue between the co-legislators regarding the AI Act and the impact of the modifications for the members, especially regarding the prohibition of real-time remote biometric identification and the possible exemption for targeted law enforcement activities. A Euralarm liaison has been established with CEN/CLC/JTC 21 to monitor the preparatory activities on harmonised standards supporting the future AI Act and to feed the JTC with the perspective of our sectors.

Webinars

In 2023 the Services Section organized two webinars. In one of the webinars the section explains how the guidance can be exploited by the suppliers of remote services. Another webinar focused on the digitalisation of fire services.

With respect to remote services Euralarm raised to CEN/CLC/JTC 4/WG 1 the need for a stability period allowing for the implementation of the remote services standard EN 50710 before initiating its revision.

Advocacy Committee

Proactively working on a multitude of regulations

In recent years, the Advocacy Committee has enjoyed great interest. The number of members remained stable and the number of topics covered increased. Some of these topics are covered here.

With the Extinguishing Section in the lead the a PFAS Position Paper was published and support was given to Orgalim. Exchange information with Eurofeu and FSSA. Also led by the Extinguishing Section was the preparation of a Euralarm Position Paper on F-Gas Regulation. The paper was submitted to the Extinguishing Section. Concerning the Data Act several Position Papers were published. Advocacy is preparing a summary including an explanation of Art. 1.6, 1.10 and Art 4.2



for Euralarm members usage. Requirements in the Packaging and Packaging Waste Regulation recast have been evaluated in the Advocacy Committee. New requirements should limit risk of national deviations requiring special/ additional markings. In the field of the CPR the Advocacy Committee took the lead in drafting a Position Paper on Standardisation Strategy for the Single Market. The Position Paper was sent to MEPs as well as to the IMCO leadership

With the final text of the EPBD available Euralarm drafted a recommendation on fire safety when buildings are renovated. The press information was sent to 147 MEPs. Together with 12 other associations + a joint supportive letter was finalized. In the field of Batteries and Waste Batteries TG Domestic Life Safety and TC Horizontal Compliance evaluated the impact of the regulation. An EC Guideline on replaceability/removability of batteries is in preparation and Euralarm participation is expected.

Because of the speed and multitude with which regulations are initiated and created, there is much work for the Advocacy Committee. Therefore, the committee is welcoming new and active members. Being part of the Advocacy team is a great opportunity to interact with EC, MEPs, European Parliament Committees and to develop relationships and partnership with like-minded organizations.



Horizontal Compliance Committee

The Horizontal Compliance Committee released last year five Compliance Newsletters and covered many topics. A selection of these topics is presented here.

Development of the activities

For the Committee to concentrate on monitoring emerging horizontal matters and the various topics that are impacting all the members, the Committee decided to delegate focused topics to Task Groups. Following the TG Cybersecurity and facing the tsunami of new legislations regarding the green transition, the Committee has now also set up a new TG Environment and Sustainability. These TG's are also opportunities to involve new experts in the Euralarm activities. TG Cybersecurity continuously shares with the members the activities and deliverables from CLC/TC 79/WG 17 Cybersecurity for connected alarm systems. The Horizontal Compliance



Committee monitored the case under investigation by the European Court of Justice regarding the "right to know" (Malamud case) and considered the possible consequences on the standardisation system and therefore for the members.

The revision of the safety standard IEC 62368-1 and the non-citation of the latest versions under the Low Voltage Directive have been discussed; exchanges on how manufacturers deal with this situation. HC Committee continuously informs the members about the evolution regarding the placing of products on the UK market and more particularly the extension of acceptance of CE-marked products.

Battery Regulation

The Committee has taken the lead on the topic of lead restriction in portable batteries; this restriction impacts both fire and security sectors for new products but also for the installed base; the need for cooperation with battery suppliers has been identified. The committee has also been monitoring the topic of mandatory replaceable batteries in products which is led by TG Domestic Life Safety under the Fire section.

Right to Repair Directive

The Horizontal Compliance Committee assessed the proposal from the European Commission and raised 2 concerns. It is unclear whether regular maintenance service to a system is considered as a repair service and national requirements could conflict with some provisions in the new Directive.

Restriction of PFAS

Much effort has been put in the PFAS discussion. The first deliverable of the new TG Environment and Sustainability took the form of a General statement on PFAS restriction acknowledging the concern, supporting the Commission's Chemicals Strategy for Sustainability, and calling for a risk-based approach instead of a general ban.

Radio Equipment Directive

Regarding the Delegated Regulation addressing cybersecurity and privacy under the Radio Equipment Directive Euralarm continued active participation in the Commission's Expert Group on Radio Equipment. We provided the European Commission with facts justifying a postponement of the applicability date of the new essential requirements: allow decent time for the standardisation work to complete, allow more conformity assessment bodies to get their notification and allow the manufacturers to complete the conformity assessment procedure. The postponement of the applicability date to 1 August 2025 has been granted. In addition to actively participating to the development of the standards, TG Cybersecurity commented the draft harmonised standards (prEN 18031 series) prepared by CEN/CLC/JTC13/WG8.



Cyber Resilience Act

Regarding the Cyber Resilience Act the TG Cybersecurity set up for the members an interactive discussion with DG CNECT to better understand the scope of the proposal from the European Commission. During the trilogue phase the Committee provided the Euralarm position on selected amendments proposed by the European Parliament and by the Council and informed the co-legislators about the need for unambiguous terms used in the upcoming legislation, in particular when it

comes to considering alarm systems and video cameras as a category of important products regarding the cybersecurity concern. The committee also monitored CEN/CLC/JTC 13/WG 9 regarding the standardisation request in preparation and started investigating which standards should be reused to cover alarm systems under the CRA, in particular IEC 62443-4-2 and ETSI 303 645.

Marketing Committee

Media coverage

We have successfully expanded our reach via our traditional and social media bringing the total number of professionals we have reached with our media activities to more than 163 million.

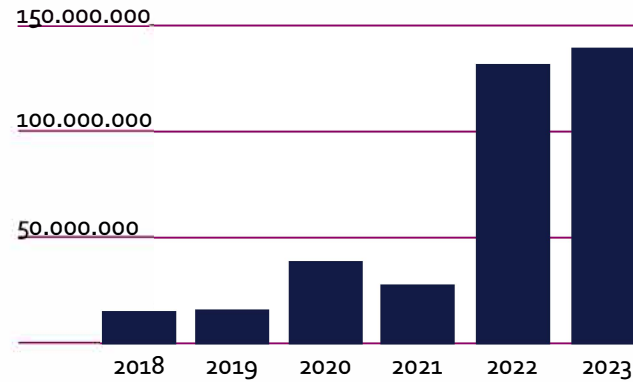


Figure: Total impressions

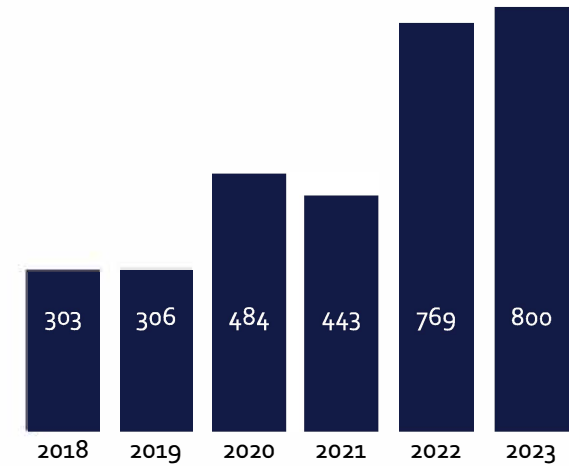


Figure: Total clippings



Social Media

With our social media channels, we not only actively bring the opinion and position of Euralarm to the attention of the key audiences, but also share insights into activities that Euralarm undertakes and engage with our members. We welcome those who are interested in the latest developments and trends in our industry to follow our social media channels. Since the beginning of 2024 we extended our social media range with Instagram focussing on a younger audience.

	2020	2021	2022	2023
Followers	692	983	1.379	1.694
Average number of postings	bi-weekly	1/week	1/week	4 posting / 2 weeks

Online presence

The Euralarm website is continuously improved and extended. Last year we added 'Webinars' as a new item to our news section allowing visitors to view the recordings of the webinars that we organized. Analytical information on the usage of the website has allowed us the last years to focus on the topics that our website visitors are looking for. And we will continue doing so, in order to fully use the possibilities of the website's technology. We raised the frequency of our corporate newsletter to 10 times per year while starting an internal bi-weekly newsletter with updates on the latest news.

	Users	Sessions	Session Duration
2023	5.900	26.000	2m42s
2022	5.000	8.100	2m17s
2021	4.000	6.900	2m47s

Overview of webinars

- 2021
 - False fire alarms
- 2022
 - Integrated fire protection solutions for lithium-ion batteries
- 2023
 - Securing the future: cybersecurity strategies for physical security (SIA, ALAS, CANASA)
 - Integrated fire protection solutions for lithium-ion batteries (French)
 - Integrated fire protection solutions for lithium-ion batteries (Spanish)
 - Checklist for Remote Services
 - Domestic Life Safety
 - Finding talent for the fire safety industry (European Fire Safety Week)
 - Digitalization of Fire Services

Attracting talent

Euralarm started in 2022 a program to promote diversity and attract new talent for our industry. This was followed by various initiatives and activities in 2023 to educate on the topic and to promote our industry, such as presentations by the Siemens Recruitment Team, Zitko Group, Rathbone Results, several webinars, promotion via the website and a new Instagram channel focussing on younger people.



Euralarm Board

From left to right:

Oscar Feijoo Jimenez, Vice President Security Section, Christian Schmitz, Chair Horizontal Compliance Committee, Milan Ceeh, Vice Chair Security Section, Julie Hanson, General Secretary, Alan Elder, Vice President Extinguishing Section, Nikolaos Stamoulis, Chair Finance Committee, Victoria Ferrera Lopez, Vice chair Services Section, Jon Könz, President, Robert Thilthorpe, Vice President Services Section, Dominique Taudin, Chair Advocacy Committee, Neil Budd, Vice Chair Fire Section, Anja Schäfers, Chair Marketing Committee, Paul van der Zanden, General Director

Not on photo: Gerd Hülsen, Vice chair Extinguishing Section

Euralarm represents the fire safety and security industry, providing leadership and expertise for industry, market, policy makers and standards bodies.

Our members make society safer and secure through systems and services for fire prevention, detection and extinguishing, intrusion detection, access control, video monitoring, alarm transmission and alarm receiving centres.

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