

FEATURE



UNDER SURVEILLANCE

The extensive use of video analytics is expected to be the next big wave in the IP surveillance industry, taking its utility beyond security.

BY HEENA JHINGAN

Someone's watching you. Earlier used as a statutory warning by moral watchdogs, the phrase is fast becoming a reality with camera lenses following people on roads, offices and even at home. Cameras installed in public and residential areas are constantly tracking changes in the surroundings.

This is the upshot of IP surveillance emerging as a compelling investment area for organizations across the board, creating a whole new market for networking resellers and integrators. Background screening, video analytics, digital video and sensor-based detection will continue to be major security investment areas for the next three to five years.

"We expect the government and defense forces to further increase investments in surveillance systems and a renewed impetus from medium-sized commercial enterprises with multiple locations such as banks, hospitals, retail shops, factories, real estate construction sites, restaurants and malls," said Subhashini Prabhakar, Chief Technology Manager, Dax Networks.

According to Frost & Sullivan, the video surveillance market in India grew by 24.5% in 2010 and amassed revenues of \$135 mn. IP surveillance systems accounted for almost 28% of the overall value of the surveillance industry.

"The industry has shown significant growth over the last few years and, specifically during the previous year, it grew by over 125%. Global security concerns and the acceptance of IP surveillance technology by most sectors fueled this growth. IP

surveillance is not just bonded to big infrastructure or high level security zones. Rather, it has entered into small industry units and even in schools and colleges," said Tejas J. Mehta Marketing Manager, Smart Guard Systems, a subsidiary of eln-fochips Ltd.

Frost & Sullivan analysts believed that the need to have video archives for various identification purposes had created a demand for IP surveillance. The ability to remotely monitor in real time made IP surveillance an attractive proposition. The Indian government's e-governance initiatives also augur well for IP surveillance vendors.

Redesigning surveillance

Video surveillance was conceived to fulfill the simple need of keeping premises secured. Over the last year and half, the industry has seen a drive towards network video surveillance. Faster and better on-board computing capabilities in the cameras support the capture of HD surveillance video. Improvements in storage and recording server specifications and in the video management application system's abilities to handle high resolution streams are helping drive adoption.

Availability of on board storage and computing power has also piqued the interest of application developers towards adding functionality at the device level. Players like Axis have already launched application platforms on the latest cameras



ENHANCED STORAGE SOLUTIONS HAVE GIVEN A NEW DIMENSION TO SURVEILLANCE BY FURTHER INTEGRATING IT WITH BIOMETRIC SOLUTIONS AND OTHER APPLICATIONS

MURALI VENKATESAN,
PRODUCT SPECIALIST, ENTERPRISE SOLUTIONS, SIFY TECHNOLOGIES



LARGE MNCs TODAY HAVE THE SURVEILLANCE TOOLS IN PLACE TO AVOID ANY MISHAP

RAJIV BHALLA,
COUNTRY HEAD - SALES & MARKETING, NEC INDIA

and are working towards building value around the solutions that are being provided.

Wireless technology and Cloud computing are changing the way that people look at this technology. "The end-user industry that suits wireless infrastructure best is city surveillance (municipalities), which happens to be the fastest growing market for video surveillance. The technology reduces the cost of infrastructure when compared to the traditional method of trenching and laying of cable. It supports networking in areas of cultural significance, such as city centers and historic sites, without the need to dig up roads. In some cases, it is the only option," said T.K. Padmanabha, General Manager & Business Unit Head, Technology Infrastructure Services, Wipro.

Cloud storage has simplified things for both SMBs and individuals. Recently, Omega tied up with Panasonic and Axis



for its networked storage offerings.

Another technology that has found many takers ever since it came to market at affordable price points is that of thermal imagery. Then there's the Surveillance-as-a-Service model that many manufacturers are hopeful will help them penetrate the SMB or residential market, which is still predominantly analog or dominated by low-end manufacturers.

Padmanabha agreed, saying that Video Surveillance-as-a-Service (VSaaS) or Cloud-based video surveillance was certainly a hot topic.

India is a market that is dominated by legacy analog surveillance systems. As a result surveillance equipment makers need to engage more closely with system integrators in order to hasten the adoption of IP-based surveillance solutions.

"India is a slow adopter and therefore, for sometime, both analog and IP solutions will have to co-exist," said Prasanajeet Bhattacharya, Business Head, Security and Mobility, Panasonic.

According to analysts, simple analog cameras can be used for IP surveillance just by adding related IP software in the recording device. End-users who have a strong implementation of analog cameras in their set-up are slowly converting their existing analog systems to IP based ones by adding IP software with the intention of maintaining efficient surveillance.

Public vs. Private

When you look at who's pumping money into IP Surveillance, demand seems to be across the board. Mehta said, "Almost every piece of infrastructure created either by the public or the private

Upcoming technologies

- Wireless and Cloud technologies are redefining IP surveillance
- Big retail players are deploying IP surveillance as a solution to capture consumer behavior and record foot falls on special occasions and during offers
- Real estate players are incorporating IP surveillance into large projects
- City surveillance projects will give the surveillance market a boost
- Under the Crime and Criminals Tracking Network and Systems (CCTNS) project, the center plans to bring police stations across the country under camera surveillance.
- Video surveillance will see value addition from applications integrated with camera solutions
- Toll collection points at the national highways and railway stations will be brought under IP surveillance, in view of their vulnerability to untoward events

sector has demand for IP surveillance." Mohammed Nasir, Senior Manager, Marketing, CSP Division, Canon India, believed that public investments were

INNOVATIONS FOR INTEGRATION WITH ACCESS, FIRE, INTRUSION AND IBMS ARE ON THE FAST TRACK



PRAMOUD RAO,
MD AND PROMOTER, ZICOM ELECTRONIC SECURITY SYSTEMS LTD.



IP SURVEILLANCE HAS ENTERED INTO SMALL INDUSTRY UNITS AND EVEN IN SCHOOLS AND COLLEGES

TEJAS J. MEHTA,
MARKETING MANAGER, SMART GUARD SYSTEMS, A SUBSIDIARY OF EINFOCHIPS LTD.

definitely on the higher end as the government was on track to move from analog to IP cameras. It had planned to have complete city surveillance for almost all tier 1 and tier 2 cities, which would again result in large investments in the sector. Also the government had planned to secure all of the forest and wildlife sanctuaries with the help of IP surveillance, which would be the biggest challenge and opportunity for IP surveillance in terms of deployment and investment.

"The market can be divided into three segments namely C1, C2 & C3. The surveillance industry thrives on the low value but high volume of the C2 and C3 segments, which consist primarily of private players. Government bodies are present in the C1 segment where there are large players competing and, while this segment is lucrative, there are challenges when it comes to bagging government deals," said Pramoud Rao, MD and Promoter, Zicom Electronic Security Systems Ltd.

Even the corporate sector has become stringent about the security measures that are in place. "Large MNCs today have the surveillance tools in place to avoid any mishap," said Rajiv Bhalla, Country Head - Sales & Marketing, NEC India.

Besides security, the use of surveil-

lance as a tool for increasing business efficiency is also increasing, especially in sectors such as banking and retail. With banks spreading far and wide, the concept of self service banking has caught on. The high number of ATM or remote kiosk deployments not only helps banks spread their businesses but it also exposes them to possibilities of fraud, potential dangers of hacking, impersonation, phishing and a lot of other white collar crime impacting their NPA.

"Large format retailers in India, like the ones at the malls, are deploying IP surveillance solutions for reading consumer behavior on a particular day or for the duration of an offer. In India, we are working with retailers like Chroma. In real estate, the market leaders like DLF and Unitech are looking at IP surveillance as a part of their offering. We are already working on an order for 200 flats with DLF," said Nasir.

However, when it is about spending on a solution, the private sector is focused primarily on ROI; one of the key criteria would be on what value it can get out of the investment. "Buying the cheapest product in the market is not a concern for them. The public sector is generally bureaucratic and based on stringent processes to get the cheapest price; but

this generally means that they do not factor the quality/best value of the product as part of the decision," said Oh Tee Lee, Regional Director, South Asia Pacific Region, Axis Communications.

"The government business is king-sized, while the small private companies might not be very conscious about branded solutions," said Bhattacharya.

Innovation

Shrikant Shitole, Vice President, Transformation Business, Cisco-India and SAARC, viewed the network as a platform and believed that security could be integrated with the network and that various subsystems could be consolidated in order to provide a seamless security solution.

Rao saw innovations for integration with access, fire, intrusion and IBMS on the fast track.

"Better optimization and enhanced storage solutions have already given a new dimension to surveillance, further integrating it with biometric solutions and other applications that will boost the adoption of IP surveillance in the country," said Murali Venkatesan, Product Specialist, Enterprise Solutions, Sify Technologies. "Surveillance is definitely an up and coming business, and this is why it has attracted system integrators like us. We are also seeing the big IT players like IBM and HP entering into various collaborations in this space," he added.

From the technological standpoint, a lot of innovative stuff is available on IP platforms. As always the cost-benefit analysis has to be done and for deployments above a certain size, IP surveillance is the only way to go.

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THE SURVEILLANCE INDUSTRY THRIVES ON THE LOW VALUE, HIGH VOLUME SEGMENT CONSISTING PRIMARILY OF PRIVATE PLAYERS. THERE ARE LARGE PLAYERS COMPETING IN THE GOVERNMENT SEGMENT AND, WHILE IT IS LUCRATIVE, BAGGING DEALS IS A CHALLENGE