



Globalizing Labor in Response to a Globalized Security Industry

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Security Industry is Consolidating

1990s – beginning of rapid global consolidation

Group 4 Securicor acquisitions:

1991

- IMS (Belgium)

1993

- ISS security business
- EWWS Group (Austria & Canada)

1995

- Shorrocks Guards (UK)
- Trygghetssentralen (Norway)
- Partena Security (Sweden)
- Falken (Norway)

1997

- New Century (US)
- Two firms (Finland)

1998

- SIMIS (Germany)
- Sezam (Poland)
- AS ESS (Estonia)

1999

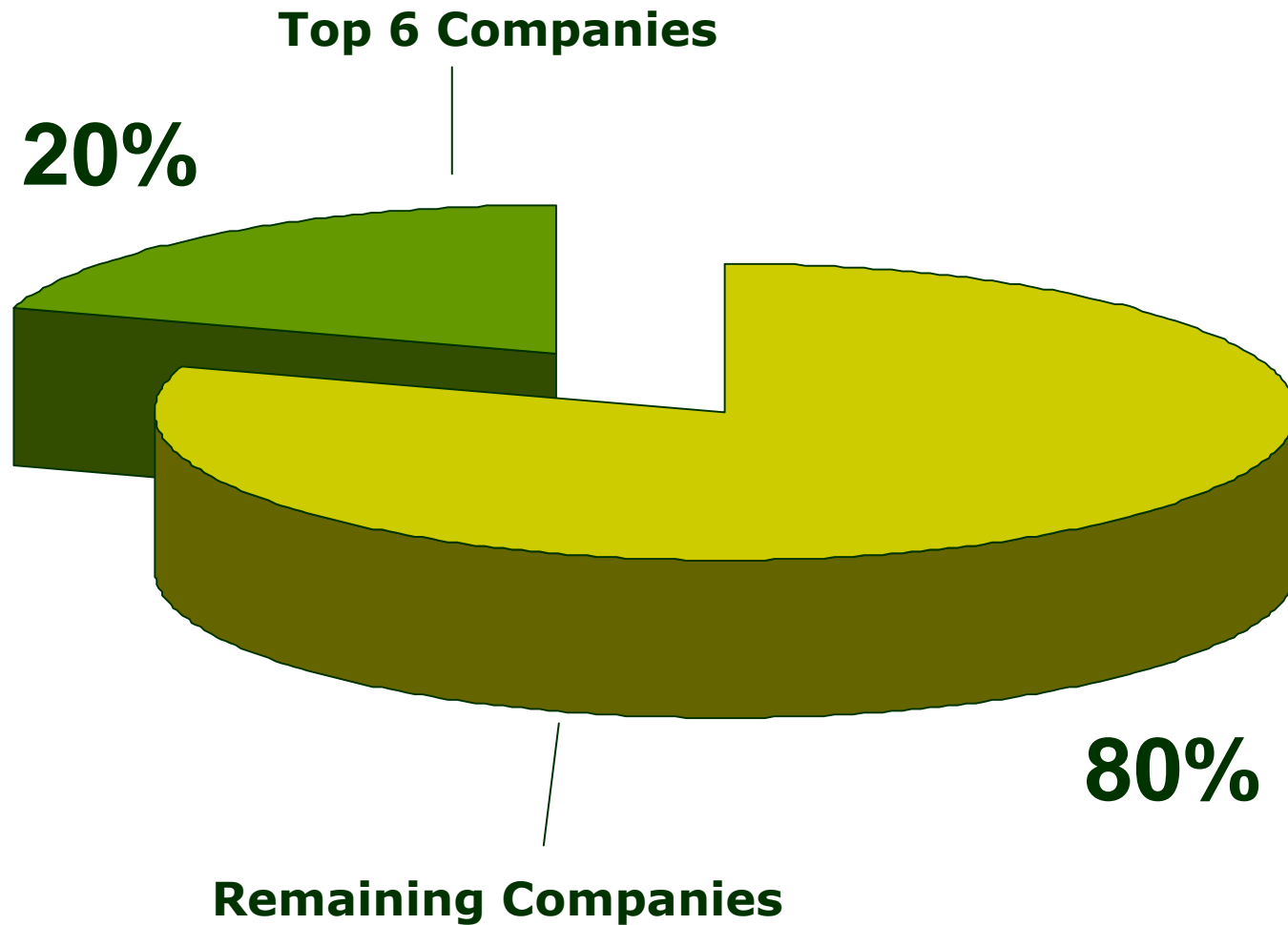
- Nederlandse V. (Netherlands)
- UAB Gelvora (Lithuania)

2000

- ADS (Germany)
- SOS (Austria)
- SPAC (Finland)
- BOS (Czech Republic)
- Unikey (Norway)
- Banktech (Hungary)



Global Market Share: 2004





Global Security Companies

Group 4 Securicor (UK)

- 420,000 employees
- 100+ countries
- €6B in annual revenues

Brinks (US)

- 45,000 employees
- 130 countries
- €2B in annual revenues

Securitas (Sweden)

- 217,000 employees
- 21 countries
- €7B in annual revenues

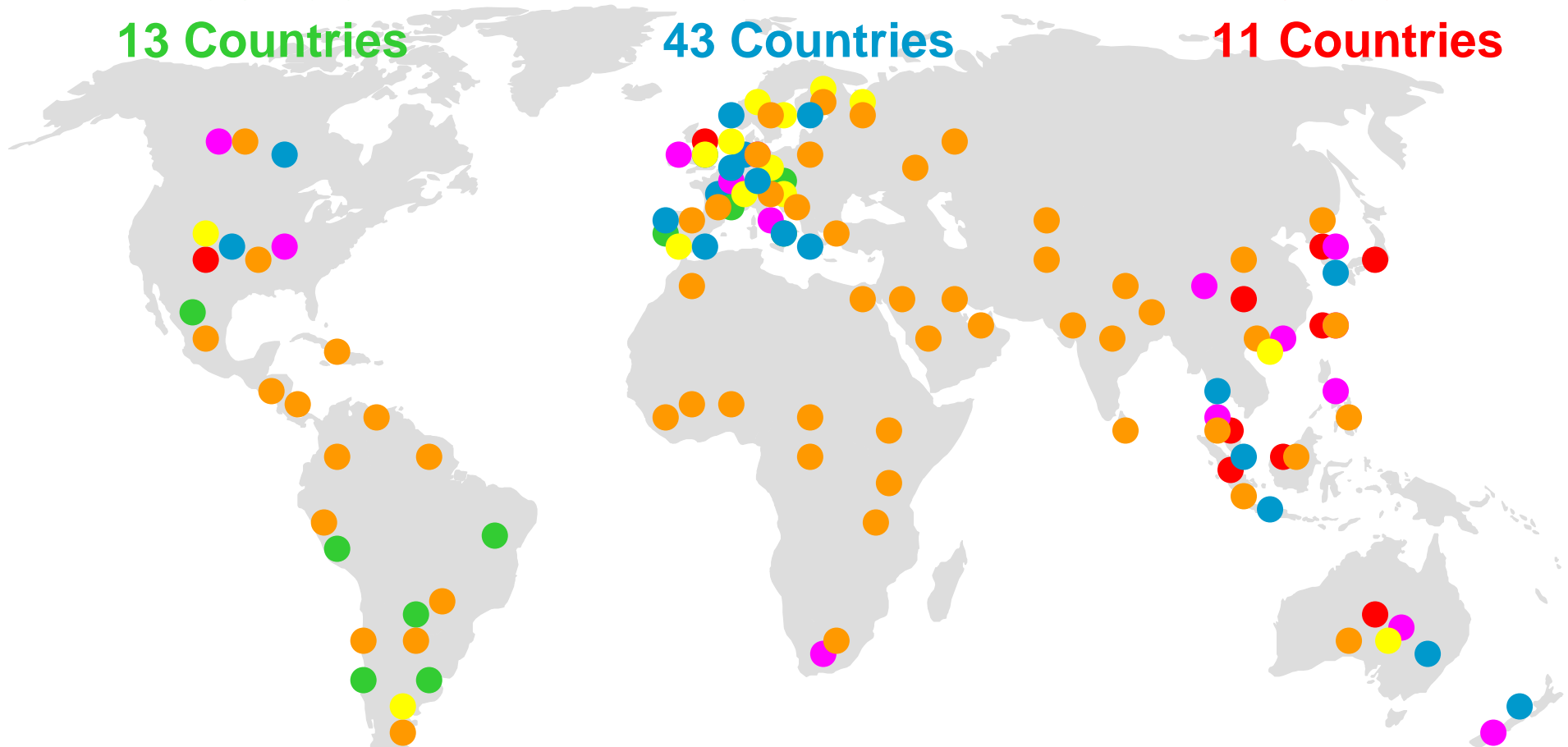


Global Security Companies

PROSEGUR
13 Countries

RENTOKIL INITIAL
43 Countries

SECOM
11 Countries



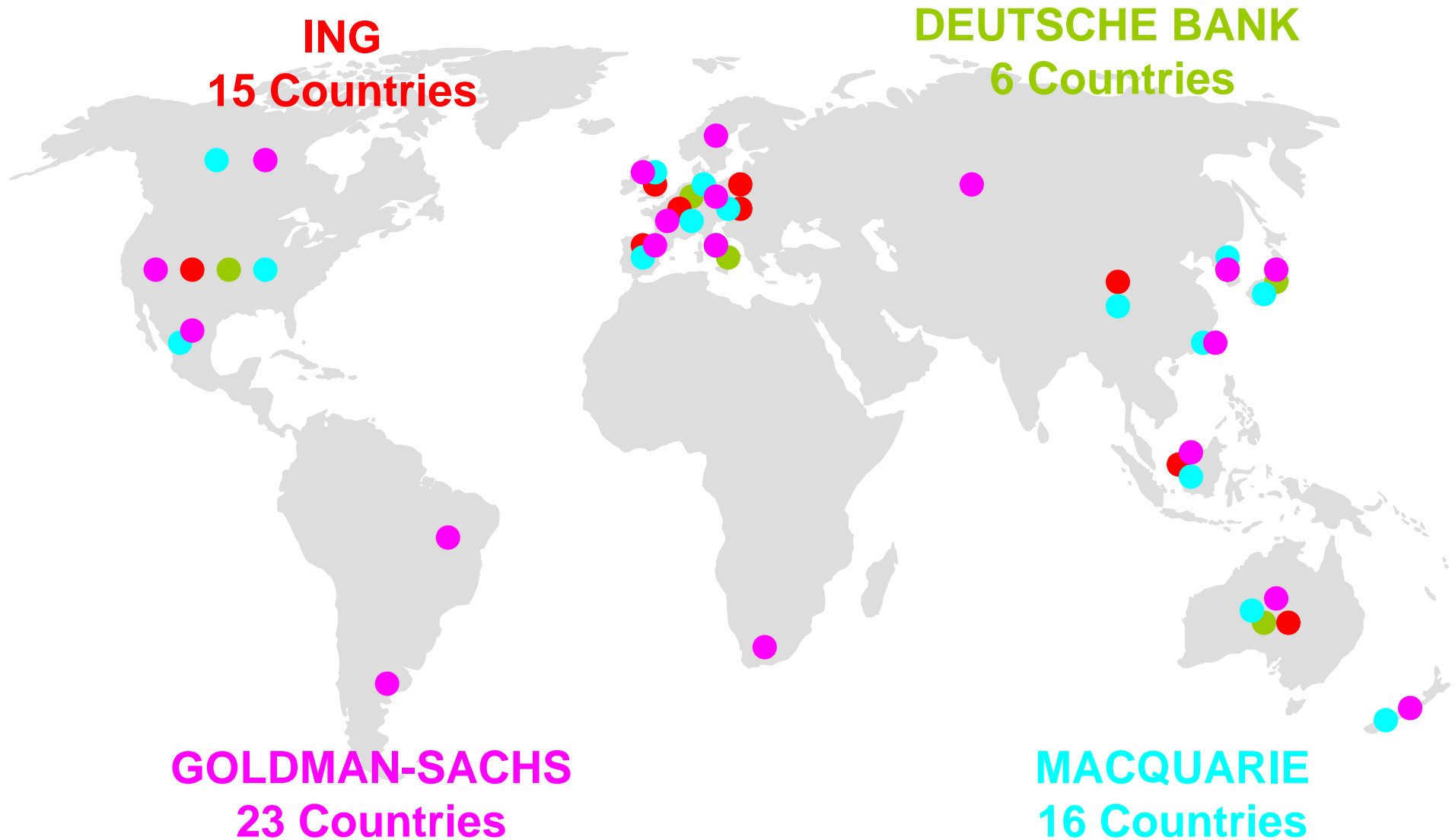
GROUP 4 SECURICOR
100+ Countries

UTC CHUBB
17 Countries

SECURITAS
21 Countries



Global Owners



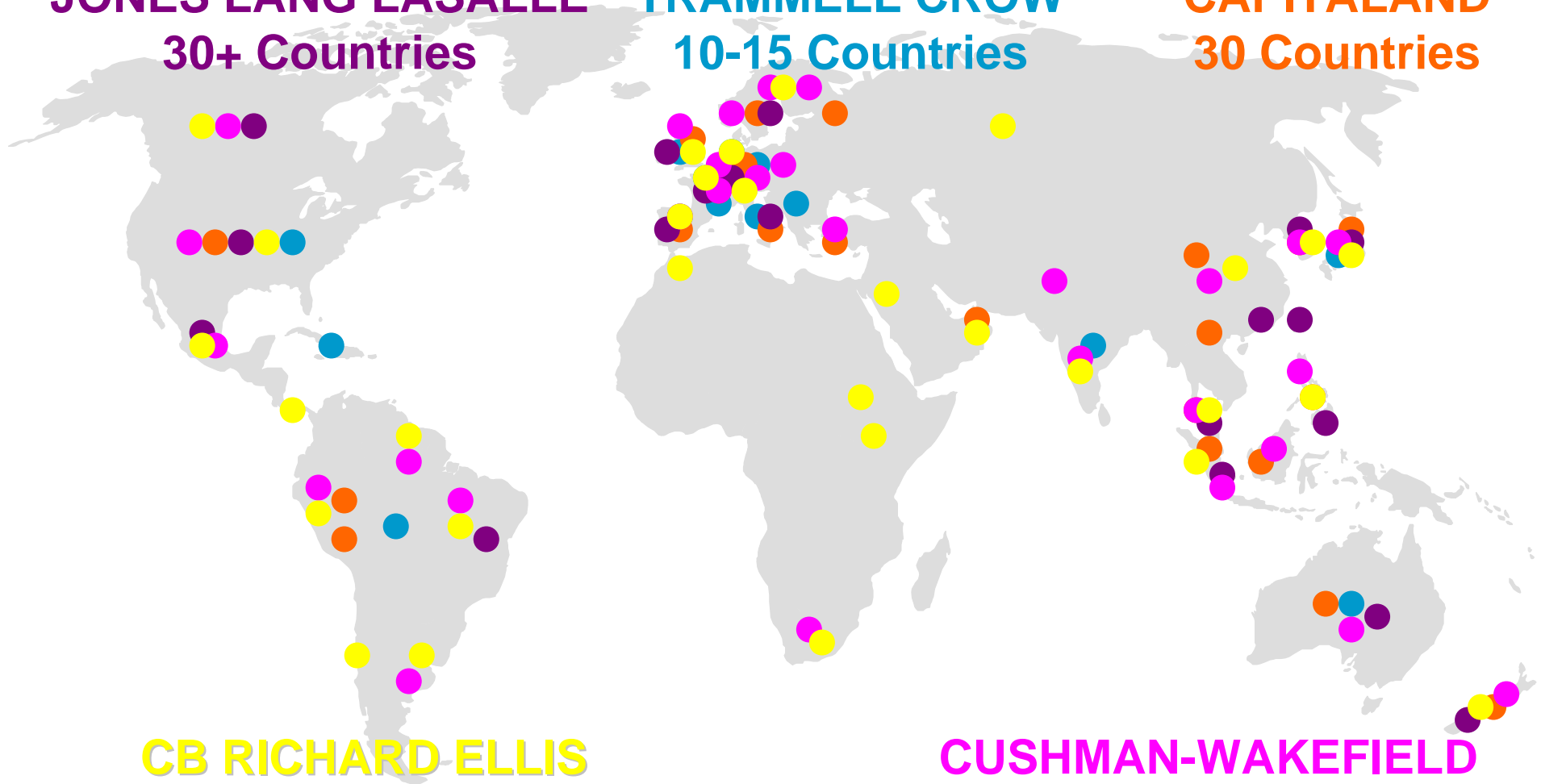


Global Property Managers

JONES LANG LASALLE
30+ Countries

TRAMMELL CROW
10-15 Countries

CAPITALAND
30 Countries

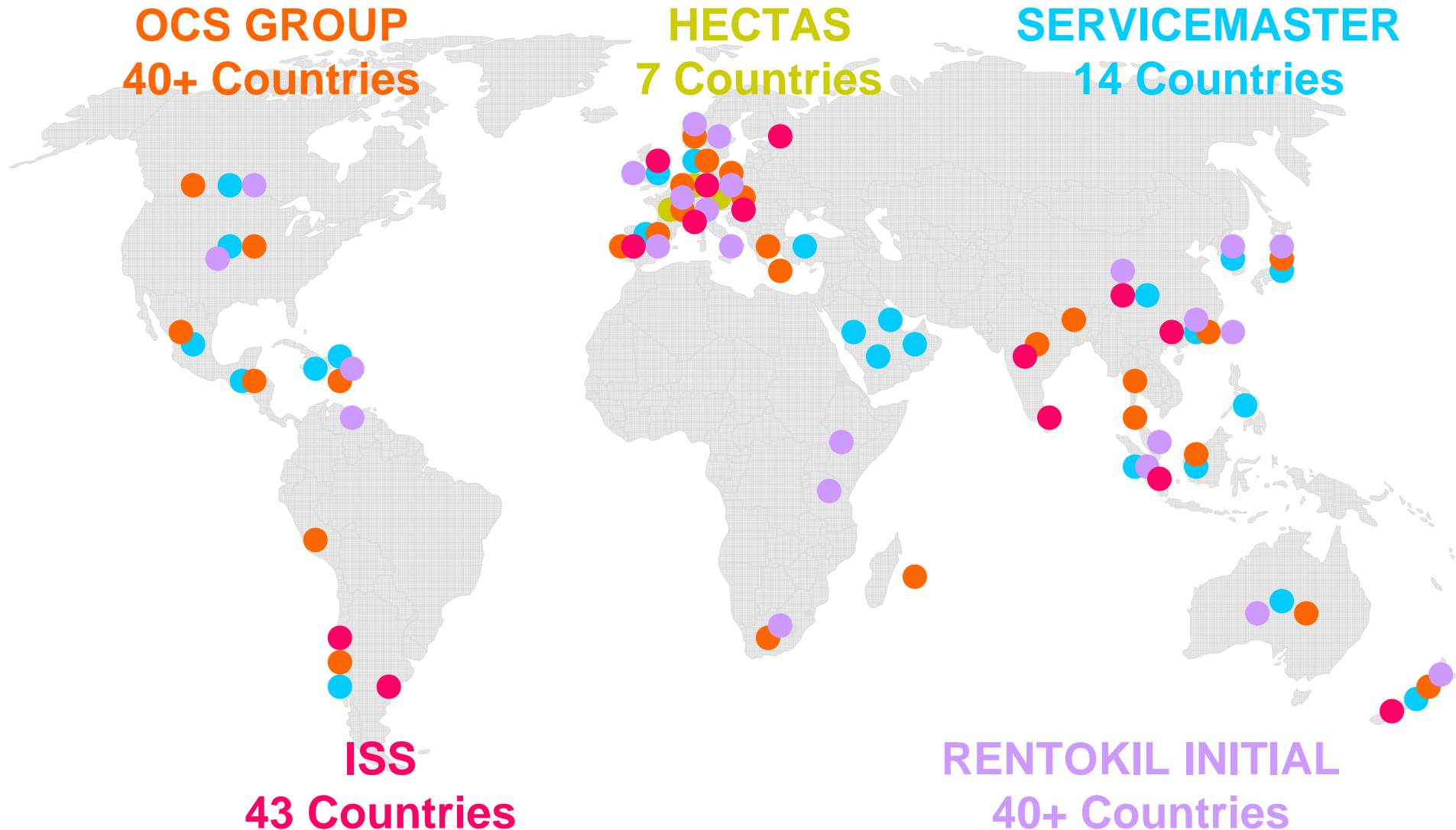


CB RICHARD ELLIS
50+ Countries

CUSHMAN-WAKEFIELD
50+ Countries



Global Cleaning Contractors





Borders Are Fading, Multinationals Are Growing





Many officers live in poverty

Warsaw

- Officers earn minimum wage (5 zloty per hour)

Rent + Utilities: 1,000 zloty

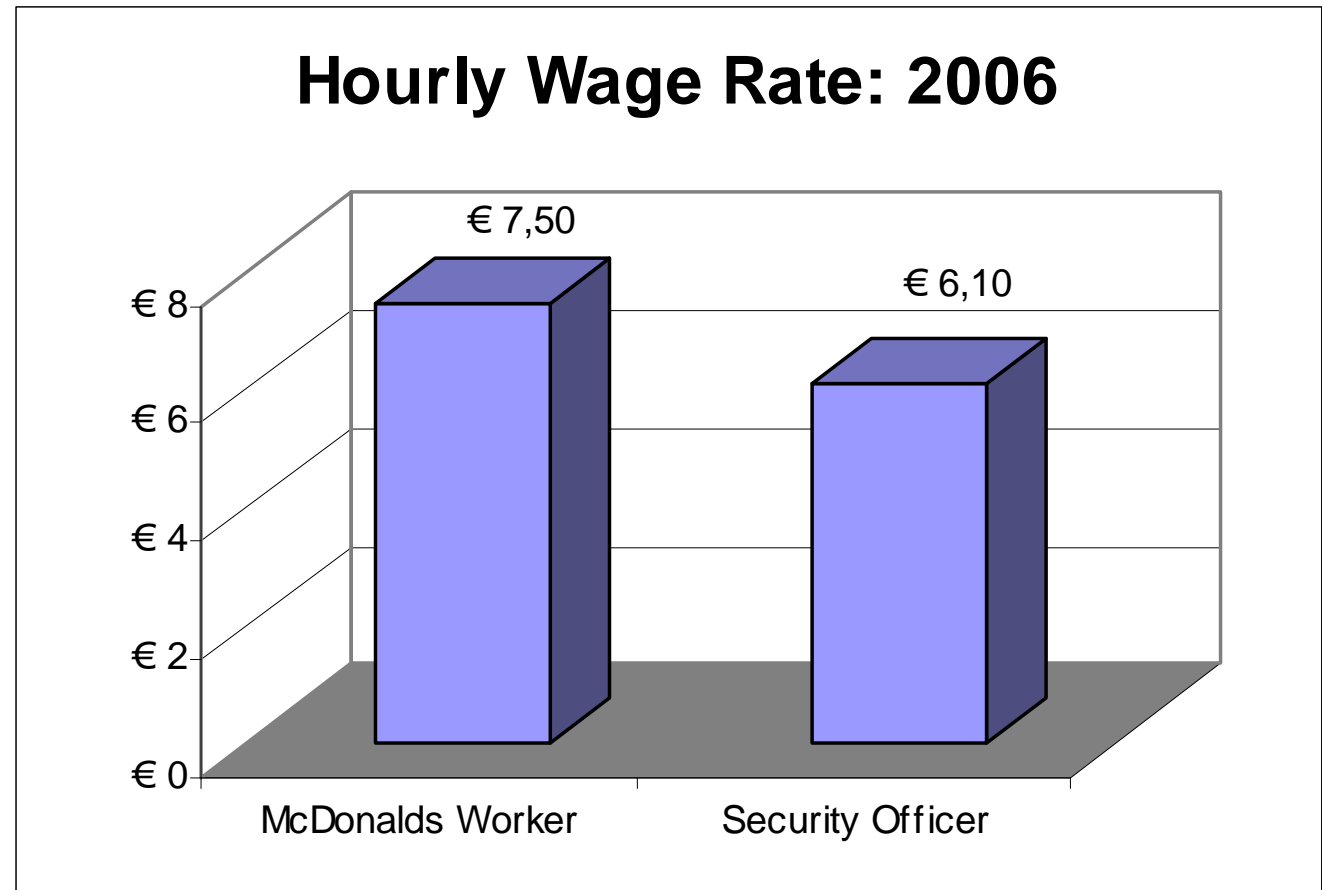
Monthly FT Pay:	890 zloty	} 1,200 zloty
Pay from 2 nd Job:	300 zloty	

After housing costs, officers have only 200 zloty
or **7 zloty per day (US\$2.13)**

Many officers live in poverty

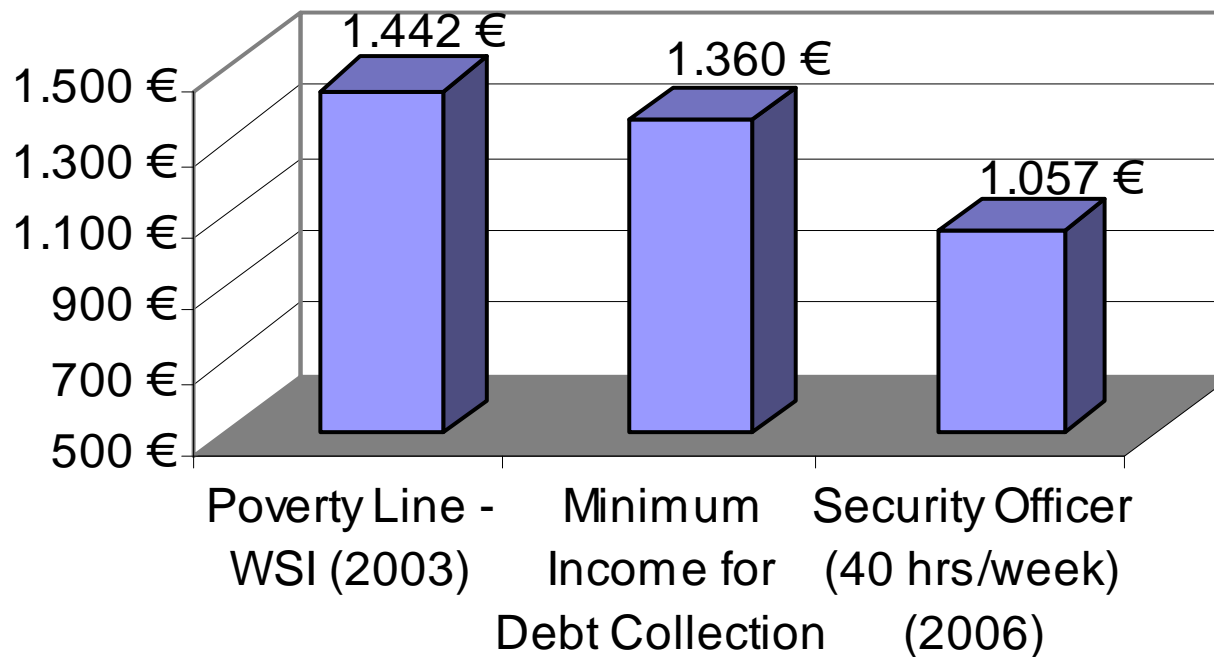
Hamburg

- 6.10 € per hour



Hamburg Officers in Poverty

Security Officers' Income vs. Minimum Income Standards (Gross Monthly Income)





**Global companies
require global organizing
and global unions.**