INTEL

Skills Intelligence for the Private Security Services - Next Generation

2025

Project by **Co.ESS** Confederation of European Security Services

UNI global union europa

ARIS ASOCIAȚIA ROMÂNĂ A INDUSTRIEI DE SECURITATE

Research partner **MKOR**

Table of contents

CONTEXT & METHODOLOGY

- Context
- Objectives
- Methodology
- How to read the report

INTEL: Skills Intelligence for the Private Security Services - Next Generation

The scope is to address labour and skills shortages in the private security sector, across different markets:

Findings will inform national and EU-level recommendations for making the sector more attractive and future-ready.

In Romania, the project is implemented with the support of:

national project lead   local research partner

The INTEL project aims to support Sectoral Social Partners in understanding, anticipating, preparing and managing labour and skills shortages in the private security services industry across the European Union.

Goals of the INTEL Project

Deliver data on the extent of current labour and skills shortages in the European private security services industry

Help national Sectoral Social Partners across the EU in anticipating future skills requirements in the private security services industry

Initiate an exchange on good practices and solutions among national Sectoral Social Partners in the EU and provide recommendations for action

Project objectives

The scope is to better understand the perceptions, needs and aspirations of private security workers in Romania, with a particular focus on:

Attracting younger talent in an ageing and male-dominated sector

Improving training, working conditions and long-term career prospects

Exploring specific national challenges, such as undeclared work

Please see the full report for **details, conclusions and recommendations** on the stated objectives.

Methodology

Target & Sample

Phase 1: Quantitative survey

Private security officers authorized or in training, apprentices, and students in security-related education, Romania

N=707 valid respondents

Primary target: 408 respondents aged 18-35 years
Secondary target: 299 respondents aged over 35 years

Phase 2: Qualitative – Focus-Groups

Balanced gender representation

N=11 participants

Primary target: 5 participants aged 18-35 years
Secondary target: 6 participants aged over 35 years

Data Collection

Online survey (CAWI)

April – May 2025

Online discussions

August 2025

Methodological limitations

Limited representativeness

The results reflect the perceptions of employees from stable, well-established companies rather than the full spectrum of employment realities in the Romanian private security sector. This is due to:

- Convenience sample: the research covers only 4 companies out of approximately 1,500 registered private security firms nationwide, mostly large organizations affiliated with ARIS. This may introduce a positive bias regarding working conditions and job stability.
- Sample limitations: workers from small firms, informal or unregistered employers, and precarious employment contexts are not included, which may further skew the results positively.

Measurement limitations

How openly respondents express their views may be influenced by the context in which the survey was conducted:

- Responses are self-reported
- Social desirability bias may be present, as the survey was administered by ARIS (employer association) directly at the workplace
- Sensitive topics (e.g., salary dissatisfaction, labor rights concerns, job insecurity, intention to leave) may be underreported due to the power dynamics inherent in employer-administered surveys.

How to read this report

Interactive menu
(to easily navigate between sections: dark gray for current section)

CONTEXT & METHODOLOGY   RESPONDENT PROFILE

Specific colour coding for respondents
(based on target)

Primary target (18-35 yo), Secondary target (+35 yo)

Specific colour coding for type of insights

● Positive aspects ● Neutral aspects ● Negative aspects

Country specific insights

The question was addressed exclusively to Romanian respondents

Q & N

"Q" = survey question from quantitative study; "N" = number of respondents for each question

(example)

Q: Can you tell us about your previous work experience? | N = 707

Survey Insights
(Phase 1 - quantitative study, all respondents)

Focus-Groups Insights
(Phase 2 - qualitative study)

Links to different resources
(embedded hyperlinks to other report pages or external sources)

Definitions

KEY FINDINGS

- Main conclusions
- Strategic implications

Positive perceptions regarding the sector, but a partial reality

Respondents generally express highly positive perceptions of their work environment, mainly regarding working conditions (4.5 / 5) and job stability (4.4 / 5). Public recognition and career growth are viewed more as areas of improvement (4.3 / 5). However, these evaluations must be interpreted considering the sample structure: participants are mostly from large, well-established companies that comply with labor regulations, likely underestimating precarious conditions in smaller or less formalized employers.

Despite these positive self-assessments, qualitative data reveal subtler layer of discontent. Participants in group discussions report feeling undervalued by society and perceive some tasks as less pleasant or even outside their core responsibilities ((e.g., inventory management, traffic direction, visitor escort). These perceptions contribute to frustration and might reduce motivation among respondents.

Most respondents reject undeclared work (84%) and partially undeclared work (74%), signaling normative support for legality and transparency. However, given the sample of convenience, these figures likely overestimate compliance in the broader sector.

Implication: While overall sentiment is positive, underlying frustration and feelings of undervaluation highlight the need for better communication – both internally (clarifying roles more, recognizing contributions) and externally (raising public awareness of the profession's value) – to bridge perception gaps and support workforce engagement.

MKOR for INTEL

Pragmatic entry, stability-led retention, health-triggered exits

Motivations to join the field are mainly pragmatic: financial need (63%), employment contract (46%) and job stability (45%) are the top reasons for entering the profession. Retention is most dependent on pay and benefits (69%), job stability & security (49%), and employment contract (46%).

Exit decisions, on the other hand, are triggered first by financial motives (58%), but also notably by health and well-being concerns (42%), which increasingly override purely economic reasoning. This highlights that once basic financial stability is achieved, quality-of-life factors become decisive.

Age differences further nuance this picture: younger respondents place relatively more emphasis on career growth and personal development, while older workers prioritize physical and mental health, stability, and predictability.

Qualitative insights help better understand what health and well-beings stands for: when respondents refer to health and well-being, they often mean mental balance and rest, supported by flexible schedules (e.g., 12-hour shifts followed by 24–48 hours off) and the ability to "disconnect" completely after duty hours.

Implication: The strong emphasis on formal employment, stability, and mental well-being reflects the perspective of a relatively privileged segment of the workforce – those employed by large, well-regulated companies that can provide such conditions. Their responses likely portray the upper tier of the industry, where compliance and predictability are the norm. Age specifics can inform tailored marketing and recruiting messages.

MKOR for INTEL

Training and skills development: Valued, yet misaligned

Although respondents rate the relevance of training relatively high (4.4 / 5), focus group discussions reveal that much of it remains too theoretical and compliance-driven, designed mainly to meet legal requirements rather than to strengthen real competencies.

This explains why training adequacy is perceived as insufficient when it comes to practical skill areas: computer skills (3.5 / 5) and soft skills (3.4 / 5) score below expectations.

Younger respondents show stronger interest in tech-oriented and progressive skill development, aspiring to roles in innovative guarding and cybersecurity. They seek an upskilling trajectory that evolves from basic IT and people management to advanced digital capabilities, theoretical knowledge, and leadership training.

Digitalization is not rejected but selectively embraced: 28% of respondents find digital learning methods highly effective, and another 20% consider them a useful complement to traditional formats. Acceptance is particularly strong among younger employees (55% positive toward hybrid or online formats), suggesting that digital tools could successfully modernize training when adapted to practical, scenario-based contexts.

Implication: Rebalancing training content toward applied, experiential learning and integrating flexible digital modules could not only enhance skill relevance but also serve as a key lever for attracting and retaining new talent in the sector.

Career aspirations and inclusion: High ambition, uneven opportunity

Respondents express generally high satisfaction with their career prospects (4.3 / 5), yet only 28% see a clear promotion pathway in their organization. Ambition levels are strong, especially among younger respondents – 74% aspire to leadership roles. Qualitative insights further reveal that promotions are sometimes accompanied by additional duties without corresponding pay or recognition, reinforcing the perception that effort is not consistently rewarded.

When it comes to fairness and inclusion, results highlight two distinct dynamics:

- For gender equality, both men and women largely agree that the workplace is fair – 83% of respondents (including women) believe that women face no discrimination and have the same opportunities for advancement. However, women do place greater emphasis on job security and contractual fairness, hinting at a residual sense of vulnerability despite formal equality.
- For other groups, results reflect organizational perceptions of fairness, not necessarily the lived experience of people from those specific groups (e.g.: LGBTQIA+, people with disabilities etc.)

Despite these limitations, commitment to the sector remains strong. The majority of respondents plan to continue working in private security over the next five years

Implication: The perception that equity is largely achieved may mask disparities in everyday experience. Strengthen Diversity, Equity and Inclusion (DEI) practices through transparent promotion systems, leadership training, and safe reporting channels for discrimination or bias incidents to enable the shift from perceived to experienced equity.

MKOR for INTEL

Strategic implications
Broaden sector representation in future research

Future studies should prioritize representative samples, incorporating smaller companies and informal workers. This will ensure that realities such as underpayment, high turnover, and undeclared work are adequately captured and addressed.

Ensure data collection through third party entities to mitigate social desirability bias and enhance trust.

Ensure deeper analysis of inclusion practices and perception gaps by gender identity, ethnicity, and disability.

Strategic implications
Strengthen role clarity and career pathways

Conduct internal communication campaigns to clarify the breadth and value of security roles, emphasizing professionalism beyond "routine tasks"

Implement formal recognition programs (employee of the month, peer recognition) to validate contributions

Map and communicate clear career ladders with defined criteria for advancement (skills, performance, tenure)

Ensure promotions are accompanied by proportional compensation adjustments, not just added responsibilities

Strategic implications
Elevate the public perception of the profession

Launch sector-wide campaigns showcasing the professionalism, tech integration, and strategic value of private security

Engage media and education sectors to shift narratives from "just guards" to "security professionals"

Highlight career success stories, especially from younger workers entering tech-enabled security roles

RESPONDENT PROFILE

- **Specific profiles, depending on age**
  - Primary target (18-35 yo)
  - Secondary target (+35 yo)
- **General perceptions regarding the role**

MKOR for INTEL

Primary target (18-35 yo): early adopters, rights-conscious and growth-oriented

Who they are

Gen Z (56%) and Millennials (44%), average age 27, with 59% men and 38% women. Nearly all work full-time (97%), mostly in large firms (75%). They are trained mainly through vocational pathways and entered private security by word-of-mouth, but also through exposure to officers at work or online campaigns. For many, security is an entry point into the labor market – more often a first job (21%) or a transition from unemployment (23%) or student status (21%) than for the secondary target group. Similarly, they are more connected to security networks (48% have relatives in security / public safety vs. 34% secondary target).

Experience and main tasks

With an average of 4.1 years experience in the private security domain, younger research participants work primarily in mobile guarding, access control, static guarding and monitoring activities.

Values

They reported higher awareness of labor rights and social justice, and more positive perceptions of workplace equality compared to those over 35. These findings cannot be generalized to the broader private security sector, where informal work and low union engagement are common.

Perceptions of the industry

Positive perceptions of onboarding (4.5/5), working conditions (4.5/5) and career prospects (4.3/5). Most see long-term future in sector (81%) with above-average leadership ambitions (74% vs. 68% overall). More innovation-oriented, with greater interest in innovative security solutions and cybersecurity.

Professional growth preferences

They favor personal contact and accessible supervisors while also valuing regular HR feedback, mentorship and support groups. At the same time, they are open to digital learning (31% vs. 28% overall) and prioritize training in conflict management (36% vs. overall 32%) and advanced IT skills (17% vs. overall 13%).

Secondary target (+35 yo): experienced professionals, stability-focused and loyalty-driven

Who they are

Millennials (48%) and Gen X (52%), average age 43.6, with 67% men and 33% women. Nearly all work full-time (94%), mainly in large firms (71%) and have diverse educational backgrounds from vocational to academic studies. They entered the sector through traditional pathways, mainly word-of-mouth, with less digital discovery. They show more employment-to-employment transitions and higher security industry background.

Experience and main tasks

With an average of 6.3 years in private security, many workers over 35 have over a decade of experience. They are primarily engaged in stationary, structured roles such as access control and static guarding, while mobile guarding assignments are less common (28% vs. 36% overall).

Perceptions of the industry

Positive perceptions of onboarding (4.6/5), working conditions (4.4/5) and career prospects (4.3/5). Lower long-term sector commitment (76%) with reduced leadership ambitions. More conservative role preferences and greater uncertainty about career direction.

Values

They show lower labor rights awareness but prioritize health-related concerns. They are stability-seeking, emphasizing job security while being more sensitive to pay-driven departures. Higher "don't know" rates across multiple topics (CSR concepts) might indicate information gaps rather than lack of interest.

Professional growth preferences

They prefer traditional learning methods and show lower interest in structured development (mentorship, HR evaluations etc.). Less comfortable with digital learning, they show a maintenance-focused rather than growth-oriented approach, with lower training priorities across most skill areas.

But what drives success in this sector?

Focus-group participants consider success in private security work depends on a broad set of personal values & behaviors, such as.

Personal character

Integrity, honesty, trustworthiness, responsibility

> " *I'm a decent, honest guy who minds his own business and gets the job done. – M, 18-35 yo*

Professional standards

Respect, courtesy, discretion, and professionalism in handling sensitive info

> " *I'm a quiet, focused person who stays on task and doesn't get easily influenced by what's happening around me. – W, 18-35 yo*

Workplace dynamics

Teamwork, collaboration, patience, curiosity and adaptability

> " *I'm naturally curious and like to be involved in everything. I connect easily with people. – W, 18-35 yo*

...And what do respondents think about their work?

They view daily tasks through personal lenses.

Daily tasks seen as "light" / pleasant:
- Logging vehicles, incident reports, lost & found handovers
- Patrolling, security checks, reporting minor irregularities (unlocked doors, damaged barriers)
- Video surveillance, internal calls

Daily tasks seen as challenging / high effort:
- Validating badges, visitor verification, ensuring personnel follow entry / exit protocols, supervising barriers, turnstiles, gates
- Handling conflicts, suspicious activity, emergencies (fires, medical incidents, accidents) and providing basic first aid
- Reviewing logs, taking over equipment, vehicle checks
- Inventory management, traffic direction, visitor escort, enforcing pedestrian behavior (perceived as more client-facing / extra duties)

WORK EXPECTATIONS & PRIORITIES

- Personal concerns
- Top reasons for:
  - Joining a new role
  - Staying in a job
  - Leaving a job
- Values and Corporate Social Responsibility

MKOR for INTEL

Quantitative survey- Personal concerns: Private security officers share general anxieties

Q: Please select your three most important personal concerns today | N=707

Respondents face **multiple pressures**, primarily related to economic security, with half concerned about **inflation and cost of living**. Personal health (45%) and broader social stability issues – such as political climate (32%), unemployment, and public safety (31% each) – follow.

Younger study participants (18–35 yo) experience **higher anxiety about unemployment, crime and social justice**, while those over 35 years focus more on **health and financial stability**. Gender perspectives also vary: women report greater concerns about inflation, safety and unemployment, whereas men tend to be more focused on economic inequality and wider societal issues.

	Primary target 18–35 yo	Secondary target +35 yo	Women	Men
Inflation and Cost of living 53%	51%	**56%**	**59%**	50%
Personal health 45%	38%	**53%**	43%	46%
Political climate in my country 32%	30%	**34%**	30%	32%
Unemployment 31%	**35%**	25%	**36%**	28%
Crime, Safety and security 31%	**39%**	20%	**35%**	28%
Economic inequality 23%	**28%**	16%	16%	**27%**
Discrimination 22%	**25%**	17%	23%	22%
Climate change & environment 17%	18%	15%	14%	19%
Migration 7%	7%	6%	4%	8%
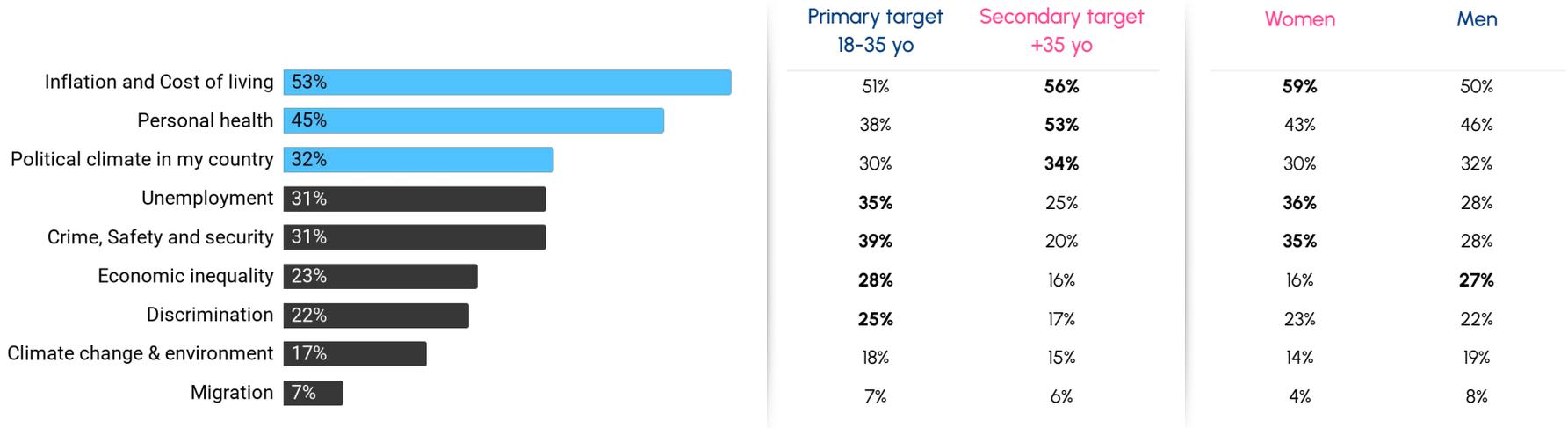
The employee journey: Evolving priorities from entering to leaving a job

ENTERING

Economic security drives decision-making

They join a new role for:

Pay and benefits (63%)
Employment contract (46%)
Job stability & security (45%)

STAYING

Mindset shifts from acquisition to protection

They stay in a job for:

Pay and benefits (69%)
Job stability & security (49%)
Employment contract (46%)

LEAVING

Physical and mental wellness override pure economic calculations

They leave a job for:

Pay and benefits (58%)
Health & well-being(42%)
Employment contract (38%)

Quantitative survey: The main reasons for joining a new role are pragmatic

Q: Imagine you chose a new job: what would be the three most important factors for you to look out for? | N = 707

Pay and benefits lead, followed by **clear contracts and job security,** highlighting a desire for financial stability and predictability in a sector often characterized by short-term contracts, irregular hours and low pay.

Health and well-being also rank high, especially among experienced workers, who also prioritize stability more. **Younger respondents (18-35 yo)**, however, show stronger interest in **training** and **having a voice at work**, indicating emerging expectations around development and participation.

Women place greater emphasis on **contracts and workplace relationships**, pointing to a need for supportive environments in a male-dominated field.

	Bar	Primary target 18-35 yo	Secondary target +35 yo	Women	Men
Pay and benefits	64%	**66%**	62%	65%	64%
Employment contract	46%	**49%**	42%	**50%**	43%
Job stability and security	45%	42%	**50%**	46%	45%
Health and well-being	43%	41%	44%	44%	43%
Work-life balance	22%	21%	23%	18%	**24%**
Training and career development	19%	**22%**	15%	19%	18%
Relationships and workplace culture	14%	16%	11%	**16%**	13%
Job design and nature of tasks	9%	12%	6%	7%	10%
Employee voice	6%	**9%**	3%	5%	7%
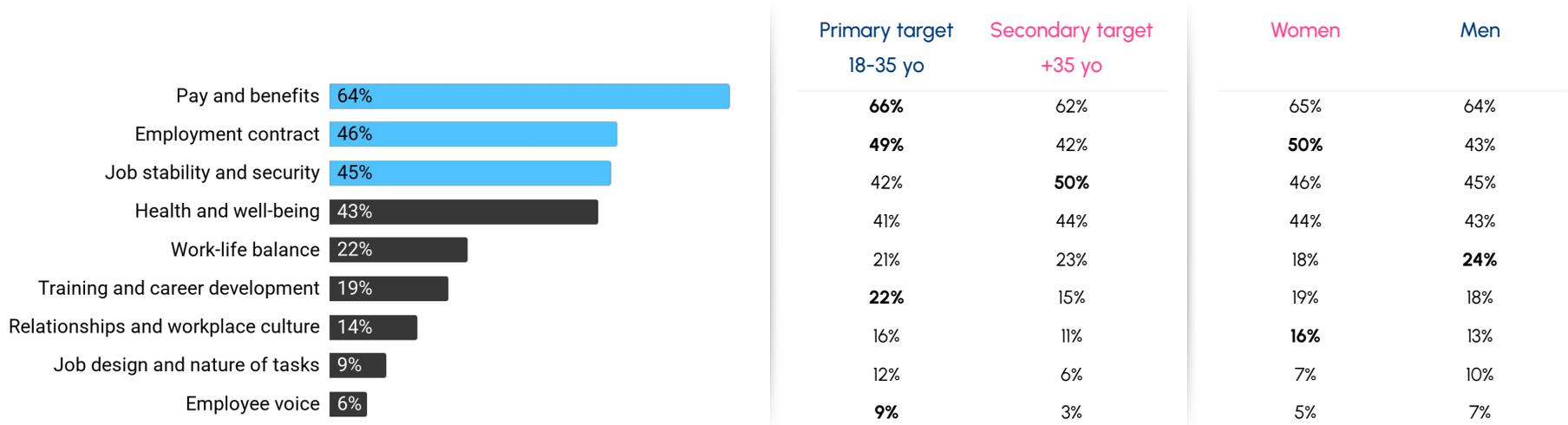
But how did respondents decide on a role in private security, in the first place?

Entry pathways vary, including personal referrals, online job ads, and re-entry after retirement or working abroad.

For most focus group participants, their current role in private security is either their first job or a career reset, facilitated by low entry requirements and perceived job stability.

> " I don't even remember exactly how I ended up here, I just came across a job ad while I was looking for work and applied. I was a bit skeptical at first, because I'd heard the pay wasn't great, not always on time, or even off the books. - W, 18-35 yo

> " I've worked in manufacturing for over 30 years, including at the same factory where I'm now working as a security guard. When I retired, I still wanted to stay active, so I applied for this kind of job – especially since I already knew the factory well. - W, +35 yo

> " I got hired right after finishing high school because I really needed a job. I appreciated that it was one of the few jobs that didn't require experience – since obviously, I didn't have any. - M, 18-35 yo

MKOR for ◆ INTEL

Quantitative survey: Top reasons for staying in a job – pay alone is insufficient

Q: Please select the three most important reasons for you to stay in a job | N = 707

While **pay and benefits dominate**, the **supporting factors** (stability, contracts, health) create the additional staying power, suggesting holistic benefit packages outperform salary-only strategies. Factors like having a say, the nature of the work itself, and interpersonal dynamics are less decisive.

Experienced workers (over 35) show above-average focus on **job stability and work-life balance**. Younger workers exceed general expectations on **employment contracts and training,** indicating stronger formal protection and growth needs.

Women also value employment contracts more, pointing to a need for stronger formal safeguards.

	Primary target 18-35 yo	Secondary target +35 yo		Women	Men
Pay and benefits — 67%	66%	68%		65%	68%
Job stability and security — 49%	47%	**53%**		50%	49%
Employment contract — 46%	**49%**	43%		**52%**	43%
Health and well-being — 42%	40%	43%		42%	41%
Work-life balance — 23%	22%	**26%**		22%	24%
Training and career development — 17%	**20%**	12%		17%	16%
Relationships and workplace culture — 13%	14%	10%		9%	**15%**
Job design and nature of tasks — 11%	**14%**	6%		8%	12%
Employee voice — 5%	8%	2%		3%	7%
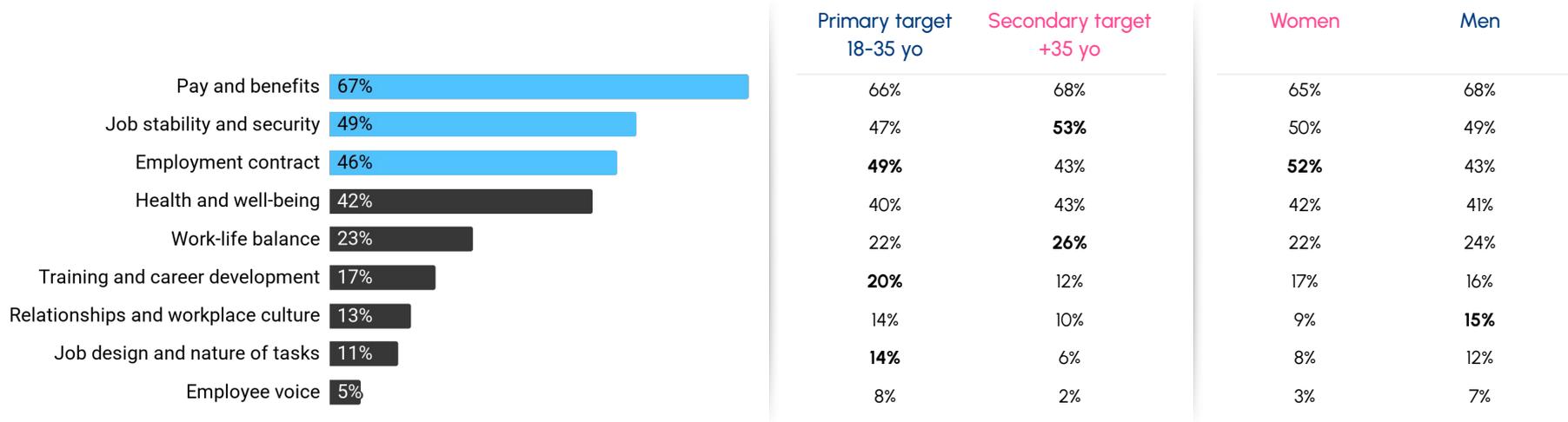
...Pay and benefits - but what kind of benefits?

Extra benefits add practical value

Although not guaranteed across all employers, meal vouchers, transport allowances, or bonuses are appreciated when provided. These tangible extras, even if modest, enhance job satisfaction and help compensate for low base wages.

> 66
>
> *I live far from the city, so I basically commute – and I really appreciate that we get some money for transportation. It's not enough to fully cover what I spend each month, but still, it helps. If it weren't for that support, it honestly wouldn't be worth coming to work. - W, +35 yo*
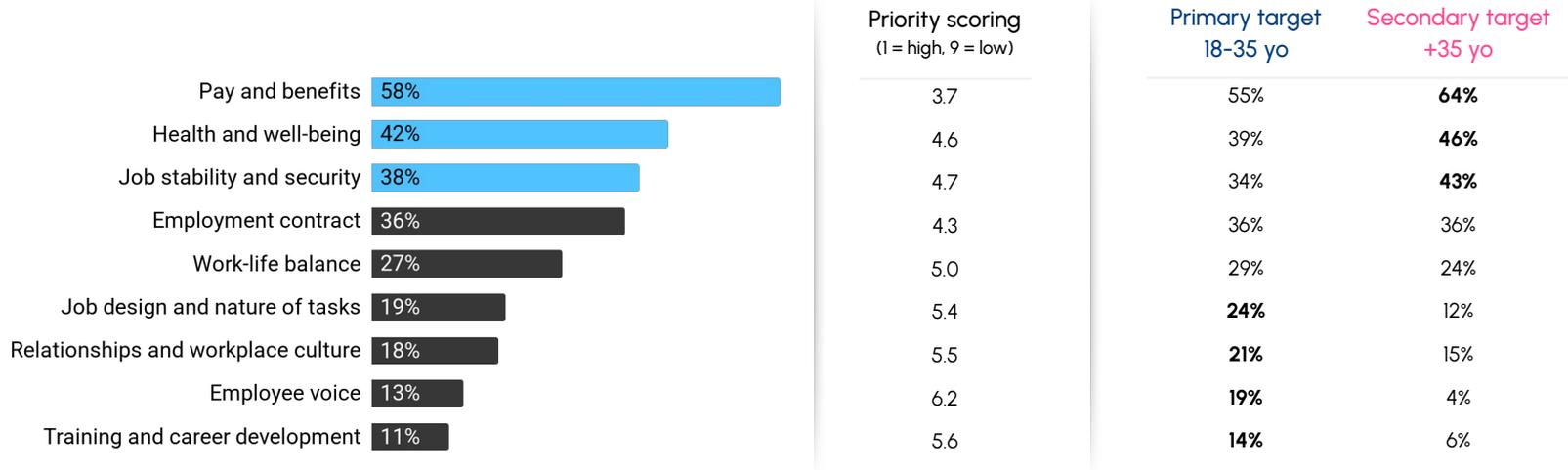
MKOR for ◆INTEL

Quantitative survey: Top reasons for leaving a job – pay dominates both selection and priority, while health creates moderate but meaningful departures

Q: Please select the three most important reasons why you would leave a job & Q: Rank the factors based on their importance when considering leaving a job. Rank from most important (1) to least important (9) | N = 707

Pay and benefits stand out as the top factor, both the most frequently cited trigger to quit (58%) and the highest priority for potential exits (3.7 / 9).

Health and well-being (42% selection, 4.6 priority) is moderately common yet highly valued among those who consider it. **Job stability** (38% selection, 4.7 priority) and employment contracts (36% selection, 4.3 priority) follow similar patterns – regularly selected and ranked as important.

	Selection	Priority scoring (1 = high, 9 = low)	Primary target 18-35 yo	Secondary target +35 yo
Pay and benefits	58%	3.7	55%	**64%**
Health and well-being	42%	4.6	39%	**46%**
Job stability and security	38%	4.7	34%	**43%**
Employment contract	36%	4.3	36%	36%
Work-life balance	27%	5.0	29%	24%
Job design and nature of tasks	19%	5.4	**24%**	12%
Relationships and workplace culture	18%	5.5	**21%**	15%
Employee voice	13%	6.2	**19%**	4%
Training and career development	11%	5.6	**14%**	6%

... And what does health and well-being refer to?

Mental well-being enabled by flexible schedules & clear boundaries

Flexible schedules (e.g., 12h on / 24–48h off) provide time for rest, personal life, or extra work.
Ability to disconnect after shifts, especially in non-managerial roles, supports overall health.

> "
>
> *What I like is that I still have time for my own things – I can take care of the kids and my family. No matter how tough the workday is, I really appreciate that once I walk out the factory gate, that's it, I don't think about work anymore. It's not the kind of job that leaves you stressed after you leave. - W, +35 yo*
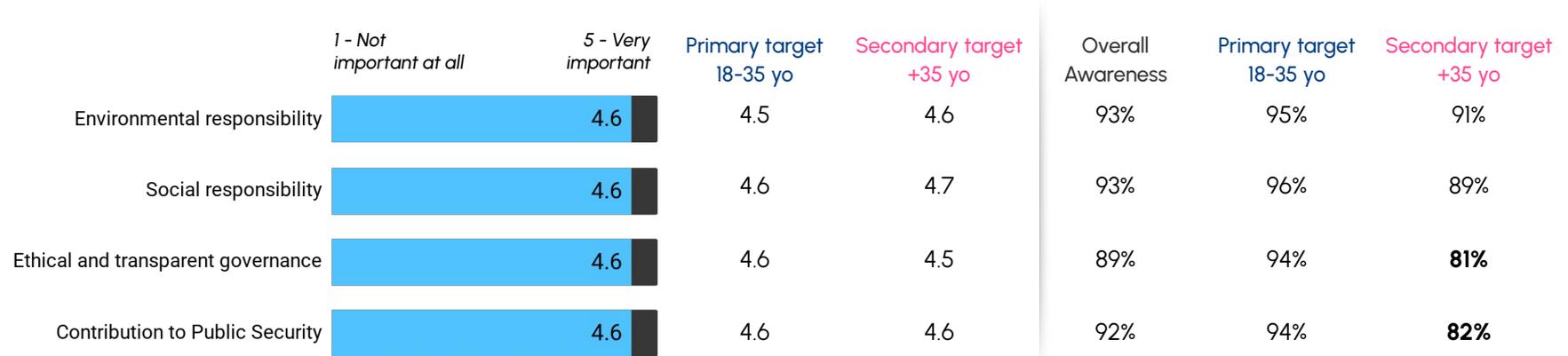
MKOR for INTEL

<u>Quantitative survey</u>: Values and Corporate Responsibility – perceived as important and visible

Q: On a scale from 1 (not important at all) to 5 (very important): How important is the corporate social responsibility (ethically, environmentally and socially responsible business conduct) of your employer to you? | N = 707

All CSR (Corporate Social Responsibility) dimensions receive **consistently high ratings** (4.6 / 5 average), indicating **universal appreciation for responsible business practices** among respondents..

However, awareness levels reveal notable generational differences. Younger respondents report 94%–96% familiarity across all CSR concepts, while **experienced study participants show lower awareness**, particularly for more abstract ideas such as "ethical governance" (81% vs. 94%) and "public security contribution" (82% vs. 96%).

	1 - Not important at all → 5 - Very important	Primary target 18-35 yo	Secondary target +35 yo	Overall Awareness	Primary target 18-35 yo	Secondary target +35 yo
Environmental responsibility	4.6	4.5	4.6	93%	95%	91%
Social responsibility	4.6	4.6	4.7	93%	96%	89%
Ethical and transparent governance	4.6	4.6	4.5	89%	94%	**81%**
Contribution to Public Security	4.6	4.6	4.6	92%	94%	**82%**

PERCEPTIONS ON SECTOR, WORKPLACE FAIRNESS & CONDITIONS

- Public recognition, working conditions, career pathways & job stability
- Fairness & non-discrimination
- Sector practices and worker rights
  - Collective bargaining & collective agreements, trade unions
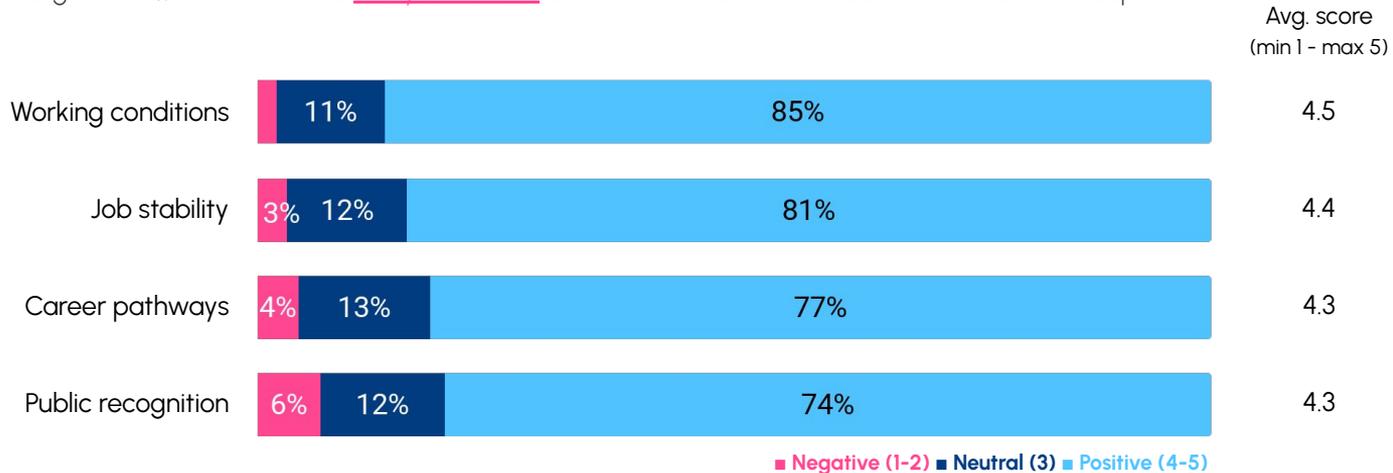 - Undeclared work (RO only)

MKOR for INTEL

Quantitative survey: Public recognition, working conditions, career pathways & job stability – positive sentiment dominates across all dimensions

Q: On a scale from 1 (very negative) to 5 (very positive), how do you perceive each of the following? | N = 707

Negative views are rare (≤6%), with most criticism expressed as neutral rather than strongly negative. This suggests respondents see opportunities for improvement, not systemic problems.

Career pathways and **public recognition** show identical patterns (both 4.3 / 5 scores, 77% and 74% positive respectively), indicating these are perceived more as **areas of improvement.**

Views on both job stability and working conditions are largely positive. However, these perceptions are shaped by the respondent profile (long-tenure, full-time employees in larger firms), as noted in the study limitations and do not reflect the broader workforce landscape.

Avg. score
(min 1 - max 5)

	Negative (1-2)	Neutral (3)	Positive (4-5)	Avg. score
Working conditions		11%	85%	4.5
Job stability	3%	12%	81%	4.4
Career pathways	4%	13%	77%	4.3
Public recognition	6%	12%	74%	4.3

■ **Negative (1-2)** ■ **Neutral (3)** ■ **Positive (4-5)**

But what lies behind these positive views of job stability and working conditions?

Expectation: A passive role with minimal demands
At first, participants assumed the job involves sitting, routine tasks, and little interaction – shaped by stereotypes and surface-level visibility.

Reality: A dynamic, high-attention role.
The job requires continuous focus, initiative, and the ability to make clear, well-considered decisions in real time. Security staff must adapt to diverse personalities and situations, maintain professionalism under stress, and tailor their approach to each client environment – whether a retail store, office, hospital, or public institution.

> *I didn't see that job with good eyes. I thought, how could I just stand around doing nothing? To me, being a security guard meant just standing idle in one place. - W, 18-35 yo*

> *It's a job that can be very demanding, depending on the location you're assigned to: in stores, you deal with a lot of thieves, you have to be very alert and on your toes. - M, 18-35 yo*

MKOR for INTEL

...And what challenges face respondents when it comes to public recognition?

Stigma & emotional strain
Work is often undervalued; focu-groups participants said they feel unfairly judged or ignored. Recognition usually comes only when something goes wrong, not when vigilance prevents incidents.

Impact on motivation & job satisfaction
Lack of public recognition reduces job satisfaction and motivation.

> "
> *The biggest problem for me is that I don't feel respected. People are people and some have a really inappropriate attitude. They behave like they're superior and refuse to be checked, even though our role is to control them at the entrance to the factory. Sometimes it's harder dealing with people like that than doing the control job itself. - W, +35 yo*

...And what other challenges were mentioned in group discussions?

Repetitive bureaucracy & monotony:
Repeatedly filling the same forms or reports lowers engagement and motivation, as it can be perceived as "boring".

Unequal workload, same pay:
Workers handling more complex or demanding tasks receive the same salary as those in simpler roles (e.g., taking on dispatcher duties versus simple secretarial tasks), reducing motivation for career advancement.

> "
> *Starting last year, I've been promoted to dispatcher. It's a role I enjoy and I've acquired the necessary skills... but it entails additional responsibilities without an increase in salary – W, +35 yo*

Quantitative survey: Perceptions of fairness & non-discrimination – high overall confidence, but perceived fairness is not the same with experienced fairness

Q: Do you agree with the following statements?
N = 707

■ **Yes**
■ **No**
■ **I do not know**

Perceived fairness is high overall, but **interpretation must be cautious**: 83% say women face no discrimination, and 75%–81% say the same about ethnic and religious minorities. However, these results **mainly reflect majority perceptions**, not lived experiences of vulnerable groups.

Only gender results for women are reliable. For LGBTQIA+, ethnic minorities or people with disabilities, we cannot tell whether respondents are themselves part of these groups, as this demographic data was not collected. If those most affected are underrepresented, their experiences are statistically "silenced" by majority responses – meaning real discrimination may be higher than captured in this study.

Respondents consider that the following groups face no discrimination, are equally treated and have the same opportunities:
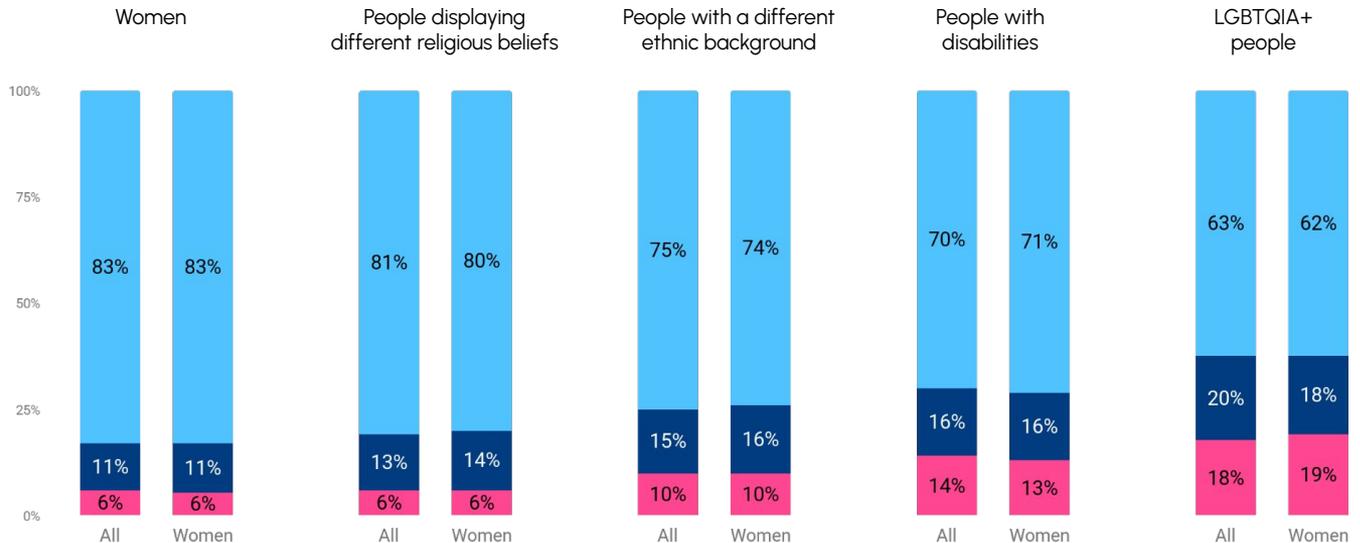
Focus-groups insights | N = 11:
But how do respondents perceive gender equality?

Same role, same duties
Men and women carry out similar tasks under comparable conditions, with leadership access perceived as open to both.

Work-life balance as a differentiator
Flexible scheduling particularly benefits women, who value the ability to manage family responsibilities alongside work.

Challenges are universal, not gendered
Lack of recognition, communication gaps and workload pressures are perceived by both men and women.

MKOR for INTEL

Quantitative survey: Awareness and perceptions of sector practices and worker rights – strong overall awareness, notably higher among younger workers

Q: Are you aware of trade unions in the private security sector? & Q: Are you aware of Collective Bargaining and Collective Agreements in the private security sector? | N = 707

% of total respondents aware of	74% Collective Bargaining & Collective Agreements	73% Trade unions	■ Yes ■ No
Primary target	**85**% (18-35 yo)	**87**% (18-35 yo)	
Secondary target	**60**% (+35 yo)	**53**% (+35 yo)	
Gender	**78**% Women, **72**% Men	**76**% Women, **71**% Men	

Note: Awareness and perceptions are based on respondents from a convenience sample, as highlighted in the methodological limitations. Moreover, knowing about sector practices does not necessarily translate into participation in trade unions or having/expecting a collective labour agreement, highlighting the distinction between awareness and the actual exercise of rights.

<u>Quantitative survey</u>: Undeclared work – strong overall rejection

Q: What's your opinion about companies which recruit security officers without fully declaring them? | N = 707

While rejection dominates (84% overall), **study limitations require careful interpretation**, as the results likely reflect both the employment reality of respondents and social desirability bias – workers are unlikely to admit tolerance for illegal practices in an employer-facilitated survey.

These results confirm opposition exists among study respondents, but cannot capture the scope or acceptance of undeclared practices within Romania's broader private security labor market. However, **experienced respondents and men show somewhat lower opposition** (80%, 82%) as they may have greater exposure to or acceptance of undeclared work practices from their longer sector experience, or potentially different risk-benefit calculations regarding undeclared vs legal employment.

		Primary target 18-35 yo	Secondary target +35 yo		Women	Men
I disagree with these practices because they are illegal and working informally means no social security	84%	**87%**	80%		**87%**	82%
I can understand officers who accept the job because it means better pay	6%	5%	7%		4%	7%
I don't have enough information	5%	4%	6%		5%	5%
Prefer not to answer	6%	4%	8%		4%	7%

MKOR for INTEL   Skills Intelligence for the Private Security Services - Next Generation | © MKOR 2025

Quantitative survey: Partly declared work – seen as less problematic than fully undeclared work

Q: Some private security companies hire agents without fully reporting their working hours, and agents accept to work over 200 hours per month with only a portion of them officially declared. Which of the statements below best describes your opinion on this matter? | N = 707

Rejection remains high at 74%, but is **notably lower than for fully undeclared work** (84%), suggesting partly declared hours are perceived as less severe. However, **the same study limitations apply**: this sample comprises employees from compliant companies, and social desirability bias likely suppresses more honest responses about illegal practices.

Women show a **higher share of uncertainty** (14% vs. 10% overall), suggesting that working hours practices may be less transparent to them or that they have less direct exposure to such informal arrangements.

		Primary target 18-35 yo	Secondary target +35 yo		Women	Men
I disagree with these practices because they are illegal and detrimental to workers' health	74%	76%	71%		70%	76%
I can understand officers who accept such practices to earn more money	11%	11%	12%		10%	12%
I don't have enough information	10%	10%	9%		**14%**	7%
Prefer not to answer	5%	3%	8%		5%	5%

SKILLS, TRAINING & LEARNING PREFERENCES

- First impressions & work environment feedback
- Career growth
  - Trajectory & growth preferences
  - Interests
  - Career outlook & long-term intentions
- Current Training Experience
- Training needs & learning preferences, including digital

MKOR for INTEL

Quantitative survey: First impressions – universally positive onboarding experience provides a strong foundation for retention strategies

Q: On a scale from 1 (very negative) to 5 (very positive), how did you perceive your onboarding process at your current employer in the private security services? | N = 707 & Q: Would you have any recommendations on how to improve on-boarding processes of employers for workers joining the private security services? | N = 68

	All	Primary target (18-35 yo)	Secondary target (+35 yo)
Average score for perceived **onboarding process at their current employer** in the private security services *(max. 5)*	**4.5**	**4.5**	**4.6**
% of **positive perception on the onboarding process**	**84%**	**85%**	**84%**

Suggestions to improve onboarding

> *More trust and seriousness. – M, +35 yo*

> *More understanding. – M, 35 yo*

> *Monthly instruction for post-specific procedures and personal knowledge in security. – M, +35 yo*

Quantitative survey: Work environment feedback – Personal networks drive recruitment, job reality perceived as meeting expectations

Q: On a scale from 1 (very negative) to 5 (very positive), to what extent did your job expectations match job reality? | N = 707

Q: How did you learn about the opportunity to work in the private security sector? | N = 707

Q: Can you tell us about your previous work experience? | N = 707

	All	Primary target (18-35 yo)	Secondary target (+35 yo)
Alignment of **job expectations with reality** *(max. 5)*	4.4	4.4	4.4
And learned about private security jobs **mainly from private contact and word of mouth**	38%	33%	45%
Were employed in a private, security-related profession, before starting their current job…	23%	16%	33%

Quantitative survey: Career trajectory – positive outlook overall

Q: On a scale from 1 (not positive) to 5 (very positive): How do you perceive your own career trajectory in the private security services? | N = 707

Respondents report **moderately positive career perceptions** (4.3 / 5), suggesting cautious optimism about advancement prospects in private security.

Average score for perceived career trajectory in private security services

4.3 **/5**

All

4.3 **/5**

Primary target (18-35 yo)

4.3 **/5**

Secondary target (+35 yo)

> *I don't feel like I couldn't advance because I'm a woman, but rather because there are few roles – and they're already taken. - W, +35 yo*

> *If they need a shift supervisor, they choose based on how you've performed. If you're serious, do your job well and get involved – there's a chance you'll be promoted. M, +35 yo*

Quantitative survey: Growth preferences – age-specific development preferences

Q: Which of the following are important to you, when it comes to growing at work? Choose the 3 most important ones | N = 707

In workers management practices, **direct, personal interaction is universally important**: 38% of respondents prefer face-to-face contact over digital.

Younger respondents, however, seek **more structured guidance and feedback** through accessible supervisors, mentorship programs and regular HR evaluations. By contrast, older ones show **less interest in formal development programs**, likely reflecting their more established career stage and record higher rates of uncertainty or refusal to answer.

		Primary target 18-35 yo	**Secondary target +35 yo**
Preference for personal over digital contact	38%	38%	38%
Direct accessibility of supervisors (via instant communication)	23%	27%	17%
Regular evaluations and exchanges with HR management	21%	**27%**	14%
Mentorship programme within the company	20%	**25%**	12%
Employee support groups (reporting channels)	18%	22%	13%
I don't know	12%	9%	16%
Prefer not to answer	16%	13%	20%

MKOR for INTEL Skills Intelligence for the Private Security Services - Next Generation | © MKOR 2025
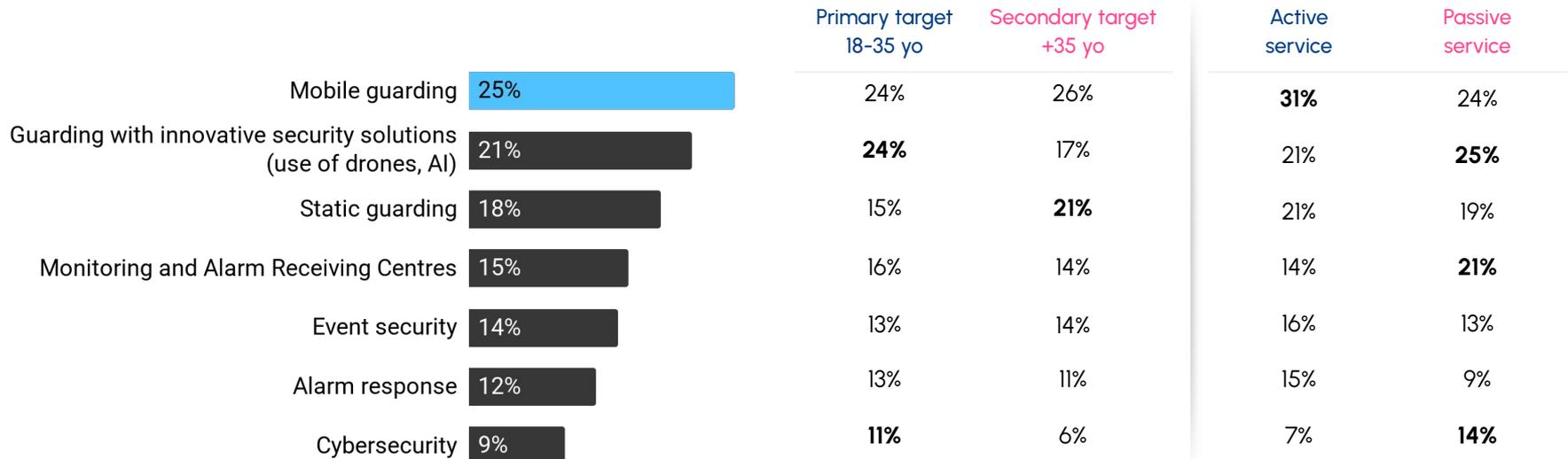
Quantitative survey: Career interests
Tech-driven tasks appeal to younger respondents and less physically demanding roles

Q: What private security tasks / missions would in the future be most interesting to you (max 3, the most appealing) | N = 707

Future task preferences highlight that **dynamic and tech-driven roles** are the **most appealing overall**. Younger respondents are particularly drawn to innovative guarding and cybersecurity, while older ones show a preference for stable, familiar tasks such as static guarding. Current job roles also shape future interests: those in active, physically demanding positions tend to maintain their preference for similar tasks (mobile guarding), whereas workers in less demanding roles lean toward monitoring and technology-focused work, including drones, AI, and cybersecurity.

	Chart	Primary target 18-35 yo	Secondary target +35 yo	Active service	Passive service
Mobile guarding	25%	24%	26%	**31%**	24%
Guarding with innovative security solutions (use of drones, AI)	21%	**24%**	17%	21%	**25%**
Static guarding	18%	15%	**21%**	21%	19%
Monitoring and Alarm Receiving Centres	15%	16%	14%	14%	**21%**
Event security	14%	13%	14%	16%	13%
Alarm response	12%	13%	11%	15%	9%
Cybersecurity	9%	**11%**	6%	7%	**14%**

Note: *Active*, respective *Passive Service* refers to respondents' current job tasks. For full definitions of these categories, see the Resources section.

MKOR for INTEL

Quantitative survey: Career outlook & long-term intentions – higher commitment of younger respondents, who also aim more for management positions

Q: Do you see yourself working in private security services in a longer term (5-10 years)? | N = 662 & Q: In the long term (5-10 years) you would like to have a leadership position in your company as a: | N = 707

	All	Primary target (18-35 yo)	Secondary target (+35 yo)
See themselves working in private security services in a longer term (5–10 years)....	**79%**	**81%**	**76%**
Are interested in a management position....	**56%**	**65%**	**43%**
Mainly....			
Shift leader	25%	27%	22%
Chief Security Officer	16%	19%	12%

Younger respondents are more willing to remain in the sector long-term and also pursue leadership opportunities more actively, while older ones seem to prioritize stability over advancement.

Top management roles of interest are Shift Leader and Chief Security Officer.

Quantitative survey: Current training experience – respondents consider that the current training programme does help them perform their job

Q: On a scale from 1 (not at all) to 5 (very much): To what extent does the current training programme help you to perform your job? | N = 707 & Q: How can qualification / training programs be improved? (open-ended)

4.4 /5
All

4.4 /5
Primary target (18-35 yo)

4.3 /5
Secondary target (+35 yo)

And they would improve qualification / training programs...

> 66
>
> *Valuing and supporting experienced staff and team members skilled in tutoring. - M, 18-35 yo*

> 66
>
> *Via paid, officially recognized professional training at least every four months in various private security fields. – M, 18-35 yo*

> 66
>
> *Working with active industry professionals to deliver hands-on training, not just theory. – M, 18-35 yo*

But what do respondents really think about the vocational training they received?

Training as a formal requirement
They started working before finishing the course; enrollment often sufficient for employment.

Gap between theory and practice
Curriculum focuses on legal frameworks, paperwork, and basic procedures. Few real-life scenarios or hands-on exercises, leaving guards feeling unprepared for everyday challenges.

Limited customization
One-size-fits-all approach ignores different roles, sectors, and client-specific procedures.
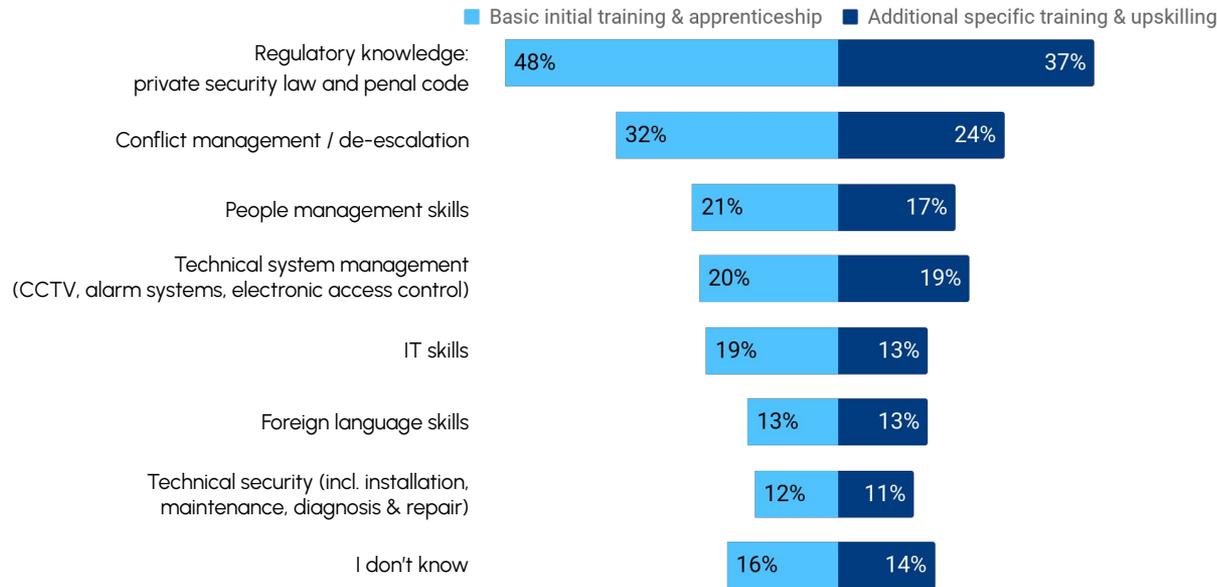
66

If you bring a certificate to work saying you signed up for the training, you can start working. The school lasts 3 months, but during that time you're working. It's more of a formality, because in the end, you learn best on the job. - M, +36 yo

MKOR for ◆INTEL

Quantitative survey: Training needs – legal foundation comes first, specialization later

Q: Which skills do you believe are important for you to attain during this basic initial training / apprenticeship? & Q: Which skills do you believe are important for you to attain during additional specific training / re-calibration and upskilling programmes | N = 707

■ Basic initial training & apprenticeship ■ Additional specific training & upskilling

Skill	Basic initial training & apprenticeship	Additional specific training & upskilling
Regulatory knowledge: private security law and penal code	48%	37%
Conflict management / de-escalation	32%	24%
People management skills	21%	17%
Technical system management (CCTV, alarm systems, electronic access control)	20%	19%
IT skills	19%	13%
Foreign language skills	13%	13%
Technical security (incl. installation, maintenance, diagnosis & repair)	12%	11%
I don't know	16%	14%

31%

In-depth theoretical knowledge of safety and security concepts

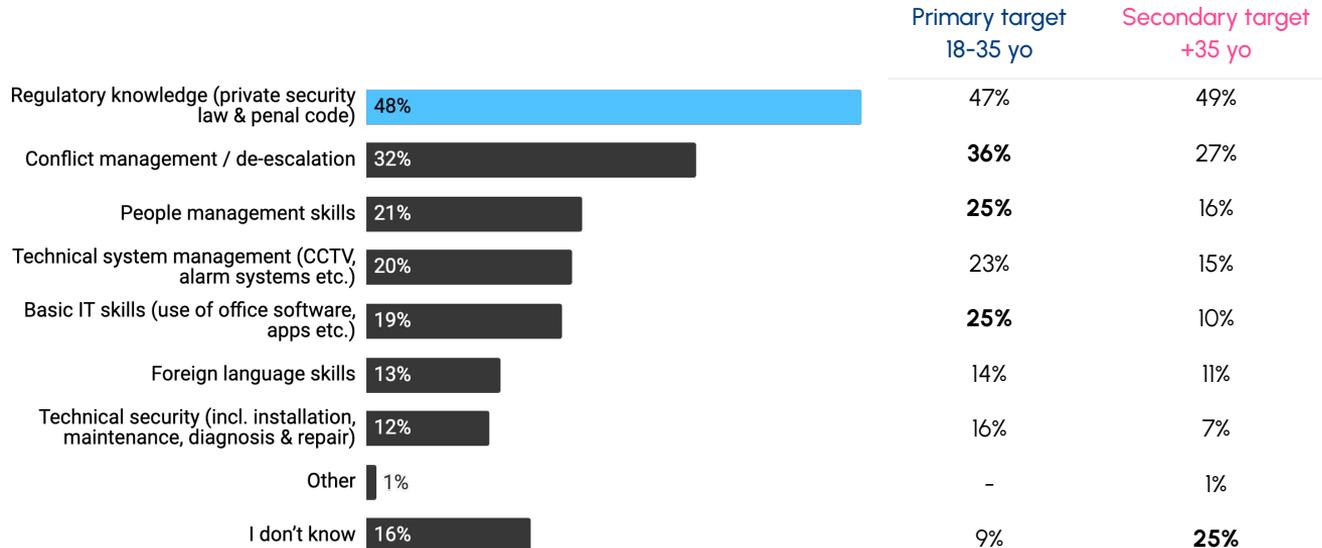*Note: This option was available only for specific training.*

Quantitative survey: Initial training needs – fragmented, with no clear consensus

Q: Which skills do you believe are important for you to attain during this basic initial training / apprenticeship? | N = 707

Regulatory knowledge leads at 48%, but this means over half of respondents do not prioritize it in initial training. Conflict management (32%) ranks second but appeals to only a third of respondents.

Generational tendencies: Younger respondents (18–35) spread their priorities across conflict management (36%), people skills (25%), and basic IT (25%), reflecting the need for diverse capabilities. Older respondents (+35) focus on regulatory knowledge (49%), show higher uncertainty (25% "don't know"), and are less interested in supplementary skills, suggesting either limited engagement in training discussions or belief that regulations suffice.

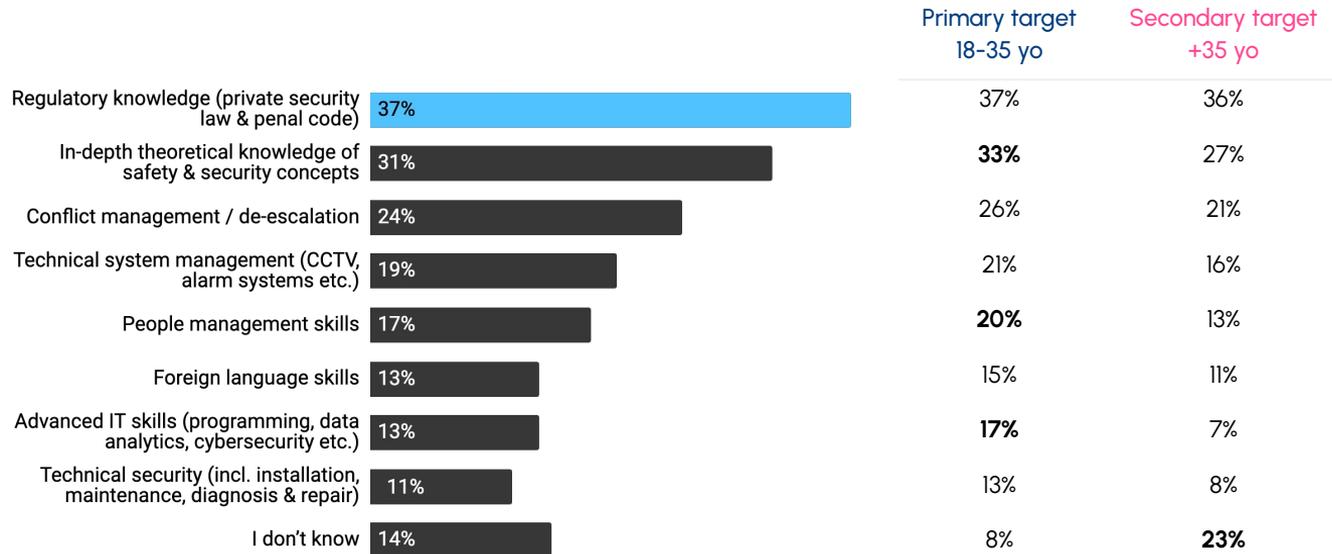|		Primary target 18-35 yo	Secondary target +35 yo
Regulatory knowledge (private security law & penal code)	48%	47%	49%
Conflict management / de-escalation	32%	**36%**	27%
People management skills	21%	**25%**	16%
Technical system management (CCTV, alarm systems etc.)	20%	23%	15%
Basic IT skills (use of office software, apps etc.)	19%	**25%**	10%
Foreign language skills	13%	14%	11%
Technical security (incl. installation, maintenance, diagnosis & repair)	12%	16%	7%
Other	1%	–	1%
I don't know	16%	9%	**25%**

<u>Quantitative survey</u>: Specific training needs – progressive upskilling for younger respondents, selective focus for experienced ones

Q: Which skills do you believe are important for you to attain during additional specific training / re-calibration and upskilling programmes? | N = 707

Younger respondents (18–35 yo) see training as a **progressive ladder**, moving from <u>basic IT and people management</u> to advanced IT, theoretical knowledge and leadership skills. Experienced ones (over 35) **focus narrowly on regulatory updates and theoretical depth**, though their interest in in-depth knowledge remains below the overall average. Their higher "don't know" rate further suggests growing disconnection from training priorities.

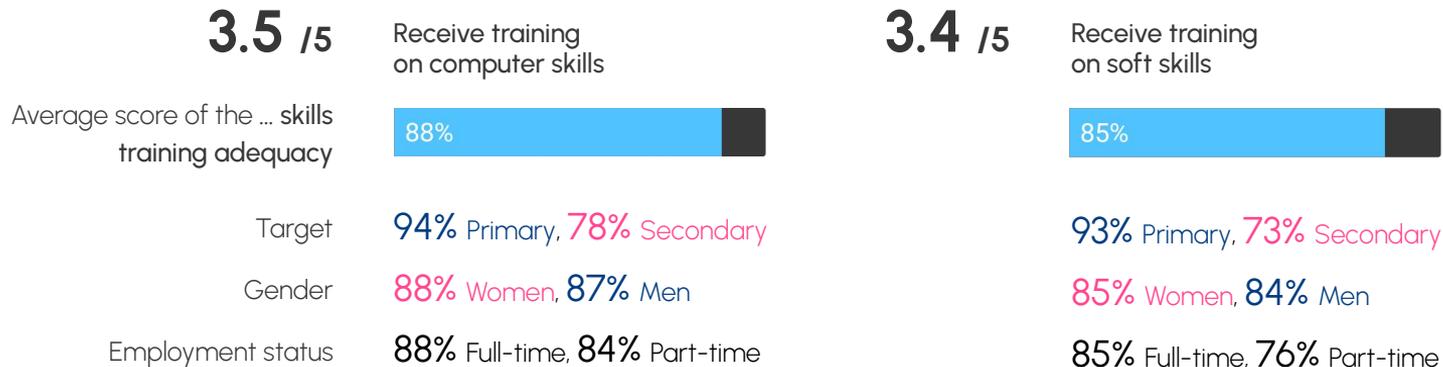|	Primary target 18-35 yo	Secondary target +35 yo
Regulatory knowledge (private security law & penal code) — 37%	37%	36%
In-depth theoretical knowledge of safety & security concepts — 31%	**33%**	27%
Conflict management / de-escalation — 24%	26%	21%
Technical system management (CCTV, alarm systems etc.) — 19%	21%	16%
People management skills — 17%	**20%**	13%
Foreign language skills — 13%	15%	11%
Advanced IT skills (programming, data analytics, cybersecurity etc.) — 13%	**17%**	7%
Technical security (incl. installation, maintenance, diagnosis & repair) — 11%	13%	8%
I don't know — 14%	8%	**23%**

Quantitative survey: IT & soft skills training adequacy – room for improvement in relevance and effectiveness

Q: On a scale from 1 (not at all) to 5 (absolutely): Do you think that you are provided with adequate training on computer skills & on soft skills for your job mission? | N = 707

Although respondents receive training on computer and soft skills, they generally **consider it insufficient for their job requirements**. Younger respondents report **higher access** (94% computer, 93% soft skills), while experienced ones participate less (78% and 73%, respectively). Part-time staff also have **lower access**, whereas gender differences are minimal. Overall, there are **challenges in both training quality and access** for two important skill sets.

3.5 /5   Receive training on computer skills

Average score of the … **skills training adequacy**	88%
Target	94% Primary, 78% Secondary
Gender	88% Women, 87% Men
Employment status	88% Full-time, 84% Part-time

3.4 /5   Receive training on soft skills

	85%
	93% Primary, 73% Secondary
	85% Women, 84% Men
	85% Full-time, 76% Part-time

Quantitative survey: Learning preferences – digital training methods can be a relevant add-on for younger workers

Q: When thinking about digital learning methods in security training, which best describes your view: | N = 707

No single approach dominates: 28% consider digital training highly effective, 21% prefer traditional methods, and 20% see digital as helpful but secondary. This lack of a strong consensus together with low skepticism (7%) shows digital training is **not dismissed**, but might point to unclear value demonstration or inconsistent implementation.

Younger respondents (18–35) are **somewhat more open**: 31% rate digital as highly effective, 24% see it as a useful add-on, while 18% still prefer traditional methods – a 55% combined moderate-to-positive view. Only 9% feel unqualified to judge.

		Primary target 18-35 yo	Secondary target +35 yo
Digital learning is highly effective for security training	28%	**31%**	24%
I prefer traditional training methods	21%	18%	**24%**
Digital methods help but traditional training works better	20%	**24%**	15%
Not enough experience to evaluate digital methods	12%	9%	**17%**
Digital learning is not effective for security training	7%	9%	5%
Prefer not to answer	11%	8%	15%

MKOR for INTEL   Skills Intelligence for the Private Security Services - Next Generation | © MKOR 2025

RESOURCES

- Deliverable
- Respondent demographics
- Definitions
- About

Deliverable

We invite you to explore the data in depth in the detailed analysis deliverables:
INTEL Market Research Study 2025 - MKOR

Full results of the quantitative analysis
➜ Sheet **Analysis EN-RO**

Questionnaires applied
➜ Sheet **Survey CAWI EN-RO**
➜ Sheet **Survey PAPI**

Discussion guides used
➜ Sheet **RO DG FGDs**
➜ Sheet **EN DG FGDs**

Quantitative survey: Respondent demographics | N=707 (1/2)

Gender	62% Men	36% Women			
Generation	42% Gen Z (18-27 years old)	45% Gen Y – Millennials (28-43 years old)	13% Gen X (44-49 years old)		
Region	12% Bucharest-Ilfov	5% Macroregion 1 (Center + North West)	45% Macroregion 2 (North East + South East)	21% Macroregion 3 (South)	16% Macroregion 4 (South West + West)
Education level	5% Primary level	27% Secondary level	60% Basic vocational training / qualification	7% Academic level (Bachelor, Master, PhD)	
Work situation	96% Full-time employee	4% Part-time employee	1% In training (apprentice / student / trainee)		
Company size	9% Micro or small (2-49 employees)	8% Medium (50-249 employees)	74% Large (+249 employees)	9% Do not know	
Relatives experience in private or public security	42% Have relatives / close contacts with experience	49% Do not have relatives / close contacts with experience	9% Do not know / Prefer not to answer		

Quantitative survey: Respondent demographics | N=707 (2/2)

Prior work experience	26% Employed in a public, not security-related profession	23% Employed in a private, security-related profession	15% First work experience	13% Freelance, not security-related profession	6% Other private sector, not security services	
Prior work situation	55% Employed	19% Unemployed	13% Student / in training	13% Prefer not to answer		
Experience in the private security field	11% Less than 1 year	25% 1-2 years	28% 3-4 years	21% 5-9 years	14% 10 years or more	2% Do not know / Prefer not to answer
Tasks performed in the last 12 months	36% Mobile guarding	34% Access control	25% Static guarding	9% Monitoring and Alarm Receiving Centres	9% Alarm response	
Job expectations vs. reality	1% Not at all aligned	2% Slightly aligned	11% Somewhat aligned	27% Mostly aligned	56% Completely aligned	
Sources of information about private security jobs	38% Private contact & word of mouth	18% Witnessing the work of security officers	11% Social media campaign	10% Job offer at company website	10% Job offer at online portal	
Public security career consideration	34% Have considered or applied for a job	53% Have not considered or applied for a job	13% Do not know / Prefer not to answer			

Definitions

Segmentation based on general age group:

- Gen Z (iGeneration):   born 1997–2006

- Millennials (Generation Y):   born 1981–1996

- Gen X: born 1974–1980

Segmentation by educational attainment:

- Primary level: people who graduated primary school

- Secondary level: people who graduated vocational school

- Basic vocational training / qualification: people who graduated high school

- Academic level: people who graduated Bachelor's Degree or Master's Degree

Segmentation by current tasks / missions:

- Active service: people who are physically active at work (e.g., access control, event security, static guarding, mobile guarding, maritime security)

- Passive service: people who are not physically active at work (e.g., access control, critical infrastructure protection, drone operator, monitoring and alarm receiving centres)

About...

Is recognised by the European Commission as the EU Sectoral Social Partner and Employers Group in the private security services.

It represents national associations in 23 European countries, promoting high standards of professionalism, training and social dialogue to ensure quality security services across the continent.

Is a leading research and innovation partner specializing in labour-market analysis and skills-development studies.

With expertise in quantitative and qualitative methodologies, ARIS supports evidence-based policy and program design to address workforce challenges in diverse sectors.

Is the European branch of UNI Global Union, representing over 7 million service workers across more than 150 trade unions.

UNI Europa advocates for fair working conditions, social justice and skills development in sectors such as finance, telecommunications and private security.

Is an innovative and agile market research agency that blends practical business experience, advanced academic knowledge and top-tier research expertise to deliver deep, actionable insights. MAYOR's team challenges traditional, rigid research methods by integrating cutting-edge technologies and flexible methodologies tailored to each client's unique needs.

INTEL: Skills Intelligence for the Private Security Services – Next Generation 2025

Coordinated by:

Co.ESS
Confederation of
European Security Services

UNI europa
global
union

Implemented in Romania by:

ARIS
ASOCIAȚIA ROMÂNĂ
A INDUSTRIEI DE SECURITATE

MKOR

It has been our privilege to work on this project.

We look forward to seeing the positive outcomes these findings will inspire.

PROJECT TEAM

Mădălina Iorga, PhD — Senior Researcher

Mihaela Nicolae — Executive Researcher

Marian Ungureanu — Junior Researcher

Mihaela Malion — Data Analyst

Alex Cimpoca — Data Collection Manager

Rareș Malion — Survey Programmer

Ana-Maria Sisu — Senior Qualitative Researcher

Corina Cimpoca, MBA — Founder & CEO
corina@mkor.ro | +40 728 853 359

Lavinia Barbu — Client Service Executive
lavinia.barbu@mkor.ro | +40 723 014 860