

Retaining and attracting the private security workforce

Young workers' perspectives from six European countries



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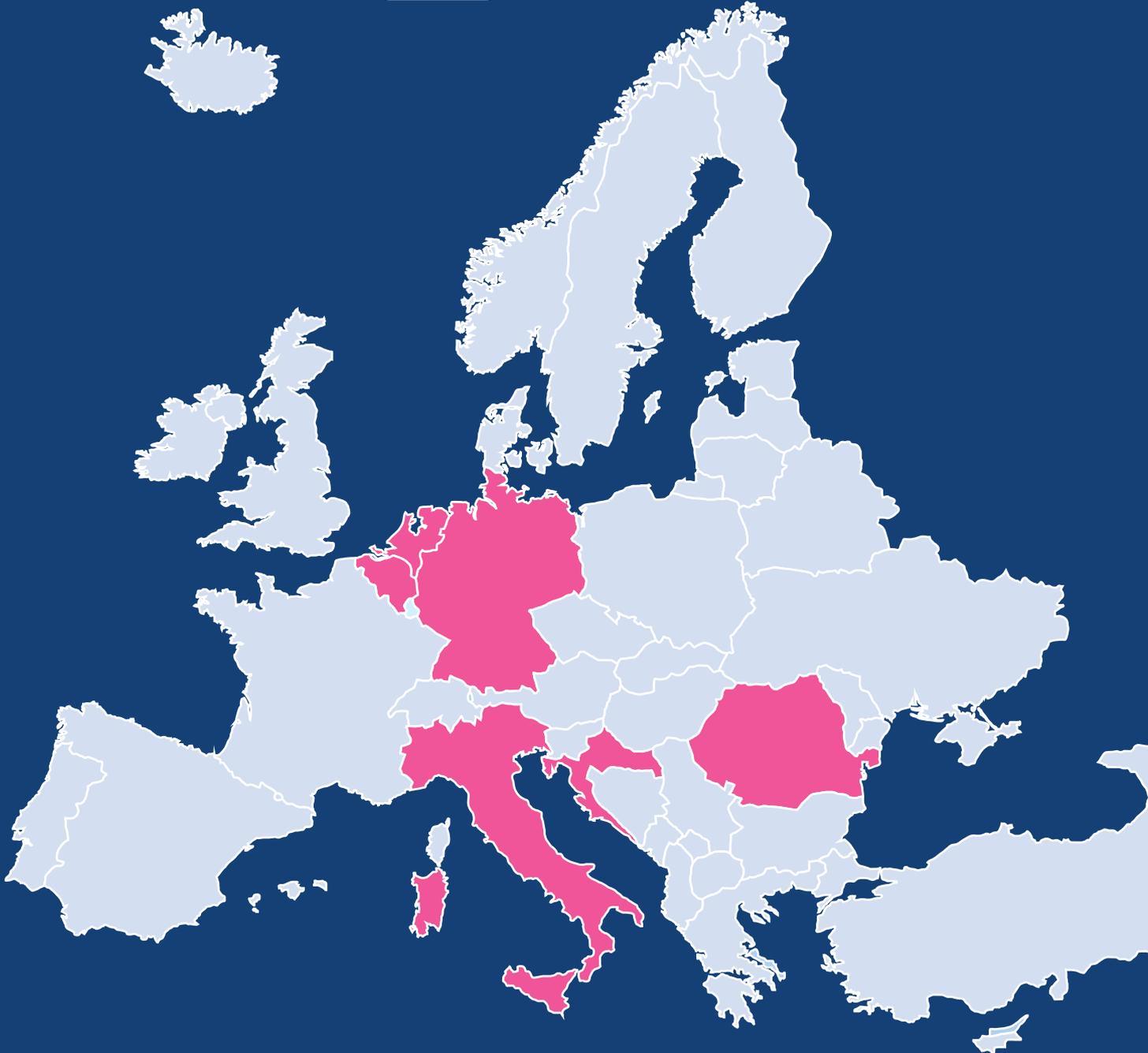
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Executive summary

This report presents the main findings of a perception study that is part of the **EU-funded Social Partner Project “INTEL: NextGeneration”**. The study is based on qualitative research, surveys and interviews that were conducted **from March to July 2025 among +2000 private security workers under the age of 35 across six EU Member States** (Belgium, Croatia, Germany, Italy, Romania, the Netherlands). The individual country studies can be found at www.securityskills.eu.

Based on these studies and the outcome of national Social Partner workshops in all six countries, this report explores how young people perceive work and career opportunities in the private security services sector, what attracted them to the sector, what motivates them to stay, and what may lead them to leave. Ultimately, the aim of this report is to offer sectoral Social Partners in Europe with indications and a better understanding on how to attract current and future young generations to the security services industry.

Young workers' priorities: security, stability and purpose

Across all participating countries, inflation and the cost of living are the main concerns for young private security workers. This reflects wider societal trends in the EU and strongly influences how young people assess job opportunities, making pay and job stability central throughout the employment cycle.

Beyond financial factors, personal well-being and public security rank highly. Many young workers see contributing to public security as a key motivation for working in the sector. Overall, jobs that offer economic security, support well-being and offer a higher “mission” for public security appear particularly attractive to young workers.

Job choice, retention and exit: what really matters

Financial conditions are the most important factor for young security workers when choosing, staying in or leaving a job. While pay remains central, work-life balance, workplace culture and well-being become more important over time, showing that retention depends on daily work organisation and people management, not pay alone.

Job security is widely seen as a strength of the sector and a source of stability in uncertain times. At the same time, limited visibility of career and development opportunities can weaken long-term commitment, especially among growth-oriented workers.

Enrolment and early experience: expectations matter

Most young workers enter the private security sector through personal contacts and word of mouth, with family and friends acting as key entry points. Seeing security staff at work in public spaces also plays an important role, underlining the value of public visibility and professional behaviour.

Public employment services, social media and online campaigns play a much smaller role, suggesting untapped potential in the industry's outreach to young people. While workers' expectations often match job reality, **around one third of young workers report early disappointment, mainly linked to pay, work-life balance, task variety and growth opportunities.** Well-structured onboarding, including clear communication, mentoring and stable contact persons, can likely help support early retention.



Working conditions: balancing expectations and structural realities

Overall satisfaction with working conditions is mixed, with workers divided between positive and negative assessments. Main concerns focus on pay and work-life balance.

These views reflect structural market realities in the security sector, including limited margins, lowest-price procurement practices and the need to deliver 24/7 services. In this context, Social Dialogue provides a key framework to balance workers' expectations with operational constraints and to develop sustainable improvements in working conditions, service quality and sector attractiveness.

People management, inclusion and workplace culture

Across countries, the human factor is central. Young workers value personal contact with supervisors, while digital tools are seen as a complement rather than a substitute. The study therefore suggests that middle managers and HR can play a key role, including through onboarding and mentorship programmes, while poor workplace culture can drive turnover.

Corporate social responsibility and ethical conduct also matter to young workers, who value the societal role of security services for public security. Gender equality remains a challenge that should be continuously addressed and improved in a male-dominated sector. Awareness of the experiences of other groups, particularly LGBTQIA+ workers, is limited, pointing to the need for continued efforts in education and awareness-raising.

Careers, skills and training: potential under pressure

Perceptions of career prospects are mixed, with many young workers uncertain about their long-term future in the sector. At the same time, interest in leadership and specialised roles is very high, especially in areas such as technology-driven guarding, Critical Infrastructure Protection and aviation security. This points to untapped potential in convincing hesitant workers of attractive horizontal and vertical career pathways through retention and talent management strategies.

Training is generally seen as adequate for current tasks, but gaps remain. Soft skills stay central, while IT and advanced digital skills, including cybersecurity and AI, are increasingly relevant. Practical and on-the-job training is particularly valued where VET systems are weaker, and digital learning is broadly accepted as a complement to in-person training.

Recognition, public perception and procurement

Young private security workers strongly identify with the value of their work but feel that it is not sufficiently recognised by clients, the public or policymakers. Social Partners suggest that this gap is also closely linked to procurement practices that prioritise lowest price over quality, skills and compliance with labour standards. From the Social Partners' perspective, procurement approaches that give greater weight to quality and compliance are more likely to support sustainable services, attractive working conditions, new career pathways, and a positive public image of the sector.

Awareness of trade unions and Collective Agreements is generally high, except in countries without established Collective Bargaining structures. This underlines both the relevance of Social Dialogue and the need to strengthen it.

About INTEL: NextGeneration

The INTEL: NextGeneration Project is co-funded by the European Commission in support of Social Dialogue and led by the EU Sectoral Social Partners in private security services, the Confederation of European Security Services (CoESS) and UNI Europa. The national members of CoESS in the six participating countries supported the national studies and project activities: ARXIA in Belgium, HCZ-CSA in Croatia, BDSW in Germany, ConFedersicurezza in Italy, ARIS in Romania, and Nederlandse Veiligheidsbranche in the Netherlands. The research was conducted by national research teams of the University of Ghent (Belgium), Institute for Security Studies (Croatia), Brandenburg Institute for Society and Security / BIGS (Germany), Format Research (Italy), MKOR (Romania) and Panteia (the Netherlands). The national studies and further information on the project can be found at www.securityskills.eu. CoESS and UNI Europa thank with this report all national partners and research teams for the successful completion of the project.

10 key take-aways for Social Partners

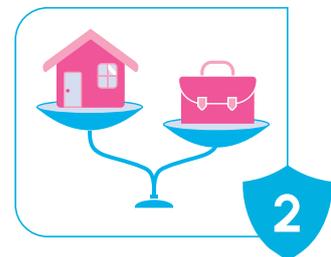


Economic security matters most.

Cost of living strongly shapes how young workers assess jobs, making competitive pay and predictable income essential reference points throughout the employment cycle.

Work-life balance is a decisive factor for retention.

While pay remains central, individual expectations for work-life balance and flexibility increasingly influence whether young workers stay or leave.

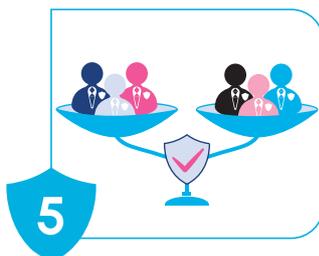


Job security is a strength of the sector.

Many young workers perceive private security as offering stable employment, which can be further highlighted in recruitment and employer branding.

Onboarding: managing and meeting expectations matters.

Many young workers experience a gap between expectations and daily work. Clear communication during recruitment and onboarding can be key retention tools.



The human factor: DEI and people management are the way to go.

Feeling supported by supervisors strongly influences job satisfaction. Inclusive people-management practices – including further attention to gender equality and non-discrimination – are key to making all workers feel valued and supported.



Outreach to young people can be broadened.

Public employment services, schools and social media are underused channels with potential to reach more young people.

Recruitment and image campaigns to align perception with reality.

Campaigns that present job content and societal value of security work can attract new entrants and enhance public understanding of the sector.

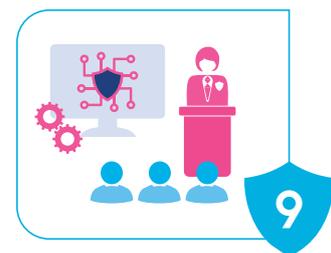


Career paths need to be clear and visible.

High interest in leadership and specialised roles contrasts with uncertainty about long-term prospects, suggesting value in transparent career development pathways.

Training works – but needs regular updating.

Soft skills remain central, while gaps in IT skills point to the need for ongoing review of training content in line with operational and technological change.



Social Dialogue and procurement shape attractiveness.

Strong Social Dialogue and quality-based procurement support investment in skills, fair working conditions and quality services, strengthening both workforce attractiveness and the sector's public image.

1. Priority concerns of young private security workers in 2025

Across all countries covered by the study, inflation and the cost of living emerge as by far the most important concern for young private security workers. This finding is not specific to the private security sector: the European Parliament's Winter 2025 Eurobarometer¹ similarly highlights inflation and rising living costs as major concerns among EU citizens, with significant shares expecting their living standards to decline in the coming years. Nevertheless, the results suggest that economic pressure is an important factor against which young workers evaluate employment opportunities in times of economic uncertainty.

Beyond financial concerns, personal health and crime, safety and security rank consistently high across countries. In some national contexts, fear of unemployment and economic inequality also play a role, while in others they are less prominent. This broadly mirrors the Eurobarometer findings, which point to security and the fight against poverty and social exclusion as key concerns for European citizens.

Taken together, the findings suggest that employment which supports economic security, individual well-being while contributing to wider societal security may resonate particularly strongly with young workers' values and concerns. As shown by the study (see pages 13 and 16), contributing to public security is indeed an important motivation for young people to work in the private security services sector. By contrast, migration and climate change, topics that receive significant attention in public discourse, are assigned much lower priority by the interviewed workers.

These concerns are closely reflected in the factors young workers identify as most important when choosing a job, deciding whether to stay, or considering leaving.

2. Factors influencing job choice

Across all countries, financial conditions stand out as the most important factor for young private security workers. This is consistently reflected in their concerns about the cost of living and in the prominence of pay and benefits as reasons for choosing a job, staying in a position, or leaving it. While financial considerations remain the most important factor throughout the employment relationship, the study suggests that their relative weight tends to decrease once workers are established in a job.

Alongside material compensation, work-life balance is another key factor. In several countries, it is valued as highly as pay and appears to gain importance when workers consider whether to remain in or leave a job.

¹ European Parliament Winter 2025 Eurobarometer, April 2025. Available at <https://europa.eu/eurobarometer/surveys/detail/3492>

- **Taken together, these findings suggest that offering competitive pay and work-life balance arrangements that reflect individual workers' expectations may provide employers with a meaningful advantage in attracting young workers in a tight labour market.**

Closely following pay and work-life balance, job security and stability emerge in all countries as important factors for both recruitment and retention. For some workers, opportunities for training and career development also play a significant role, particularly when considering a change of job that offers new prospects for professional growth.

- **Positively, young private security workers tend to rate job security in the sector relatively high. In most countries, around two thirds of respondents – and in some cases between 70% and 80% – report positive perceptions in this respect. In a context of inflation and economic uncertainty, this suggests that the sector is perceived as offering a degree of economic stability, which could be further emphasised in recruitment and image-building efforts by the industry.**
- **At the same time, the study indicates that there is room for improvement when it comes to the variety, visibility and accessibility of career pathways (see page 17). Transparent opportunities for horizontal and vertical development may be particularly relevant for younger workers with growth-oriented expectations and should be integrated in talent management strategies.**

Importantly, the results also show that issues related to personal well-being and workplace culture can become decisive factors in workers' decisions to leave a job.

- **This points to the relevance of people management practices and workplace climate in retention, beyond pay and contractual conditions alone (see page 15).**

Overall, attractive wages and working models that align with individual expectations around work-life balance emerge as the most influential factors in attracting young workers to the private security sector. This aligns with broader European labour market evidence, including Eurofound's Quality of Life in the EU 2024 study². Job security and stability appear as additional baseline expectations.

At the same time, the findings suggest that employers may be more successful in attracting and retaining workers when they adopt a more comprehensive approach. Beyond competitive pay, this includes attention to employee well-being, workplace culture, and the identification of workers interested in horizontal or vertical development opportunities. Talent management strategies that recognise these diverse expectations may therefore play a role in addressing retention challenges.

Given the multiple factors influencing how young workers assess their employment situation, the remainder of this report examines in more detail how these dynamics play out across different stages of the employment cycle, including entry into the sector, retention, and turnover intentions.

² Eurofound (2024), Quality of life in the EU in 2024: Results from the Living and Working in the EU e-survey, Publications Office of the European Union, Luxembourg.

3. Enrolment: How people join the private security services sector

Across countries, the large majority of young workers report that they learned about work in the private security services sector through private contacts and word of mouth, for example via family members or friends. In several countries, more than half of respondents indicate that relatives or close contacts have worked, or still work, in the sector.

- **This suggests that current private security workers already play a central role in attracting new entrants, act as key ambassadors for the sector, and are the best investment in the industry's future.**

In addition, many young workers indicate that their interest in the sector was sparked by seeing security staff at work in public spaces.

- **This suggests that the public visibility of security work matters. Investing in professional public appearance and a workplace culture that supports and enforces respectful and appropriate behaviour may therefore also influence how attractive the sector appears to potential new workers. For a service sector that is frequently in direct contact with the public, this can be an important factor.**



Also job offers published on online portals or company websites play a role in most countries. By contrast, it is striking that only very few young workers report being directed to the sector through public employment services. Similarly, social media campaigns are mentioned only rarely as a trigger for joining the sector. Some national differences point to possible alternative approaches. In Belgium, for example, around 30% of respondents learned about the sector through presentations at schools, while this channel plays only a very minor role in most other countries.

- **Taken together, these findings suggest that Social Partners and companies may benefit from reflecting on how young people are currently reached, and whether additional or complementary on- and offline channels could be strengthened.** This could include stronger cooperation with public employment services, more structured outreach to schools and vocational education providers, or targeted online communication efforts that reflect how young people engage with information and career choices today.

Once young workers have joined the private security services sector, it is important that their initial job expectations match with their day-to-day work experience. Overall, expectations are reported as largely met in most countries, although the share of positive responses varies significantly, ranging roughly from 40% to 80%.

At the same time, in most countries around one third of interviewed workers indicate that their expectations were not met. This points to a potential risk in the early stages of employment and suggests that managing and meeting expectations early on may be important. Clear communication before recruitment, combined with operational adjustments where possible, may help reduce mismatches between expectations and reality.

Across countries, the same factors are mentioned both as sources of satisfaction and dissatisfaction. These include pay, work-life balance, opportunities for growth, and the diversity or monotony of tasks. This suggests that these aspects are particularly decisive in the first phase of employment, either supporting early retention or contributing to early exits if expectations are not met. In some countries, such as Germany and Italy, a strong sense of commitment to contributing to security also plays a role in workers' motivation to join the sector.

- **Taken together, the findings suggest that individual workplace experiences make a significant difference.** While expectations differ from person to person, pay, work-life balance and the content of tasks consistently stand out as key factors shaping early job satisfaction. Employers may influence these dynamics by clearly communicating what the job involves, including during recruitment and image campaigns, and by presenting a realistic picture of work in a 24/7 essential service that contributes to public security.

The onboarding process can be an important tool in this context. Across all countries, a majority of young workers describe their onboarding experience positively, typically between 55% and 70%, while only around 10% to 20% report a negative experience.

- **At the same time, workers across countries point to similar areas for improvement.** These include more structured and formalised onboarding, longer onboarding periods, regular feedback, and mentoring approaches with dedicated and stable contact persons. The findings suggest that well-designed onboarding processes may help align expectations with reality and support early retention.

4. General perception of working conditions

Across countries, young workers' overall satisfaction with working conditions can be described as moderate. In most countries, responses are evenly split, with around 30% to 45% of workers expressing a positive assessment, and a similar share reporting dissatisfaction. This suggests a mixed picture, with neither widespread satisfaction nor widespread rejection of working conditions in the sector. When asked what could be improved, workers most frequently point, again, to pay and work-life balance, including clearer communication of shifts. In some countries, more practical aspects, such as the quality or suitability of workwear and equipment, are also mentioned.

Improving the attractiveness of working conditions, of which pay and work-life balance are in all sectors a central component, is at the core of the work of the sector's Social Partners. The findings reflect structural challenges that are inherent to the security services sector. Private security services often operate with low profit margins, including as a result of procurement practices that award contracts based on the lowest-price only, incentivising a race to the bottom. In addition, as a sector providing essential services to society around the clock, private security will by nature continue to rely on shift work, night work, weekend duties and on-call arrangements.

Only by balancing and improving these dimensions can the sector continue to deliver quality services, remain competitive, and offer attractive employment.

- **Against this background, the role of Social Dialogue to find sustainable solutions that take into account both workers' expectations and the economic and operational realities of private security companies is particularly important. It provides a framework in which employers' constraints and workers' needs can be jointly discussed, and where balanced and realistic solutions can be developed.**
- **The findings also support the efforts of CoESS, UNI Europa and their members for the strengthening of Social Dialogue and Collective Bargaining; a reform of EU public procurement law; and better regulation at national level that promotes quality services based on competitiveness and quality jobs.**
- **At company level, the results also suggest that taking individual expectations into account - where operationally possible - may contribute to better perceptions of working conditions. This can include approaches to flexibility, shift planning and communication that recognise different life situations, while respecting the operational requirements of a 24/7 service.**

5. The role of people management and the “human factor”

The study suggests that the human factor and personal contacts with supervisors are very important to workers – and should not be replaced, but rather supplemented by, digital communication channels. The findings indicate that workers value feeling seen and recognised in their daily work and having regular contact with their employer. This can be particularly relevant in business segments where many services are delivered off-site and where workers may operate alone or in small teams.

- **The results suggest that companies can make a meaningful difference through a strong focus on people management.** This may include investing in the skills of middle managers, who often play a key role in daily contact with workers, and using digital tools to support timely and clear communication.
- **In some countries, interviewed workers show strong support for mentorship programmes and more regular evaluations and exchanges with HR management.**
- **Employee support groups are seen as less relevant in comparison to other people management strategies, but still receive strong support in some countries.**

Taken together, and in line with earlier findings that a negative workplace culture can become a trigger for job changes (see page 11), the results suggest that strengthening the human dimension of work, proactive employee support, and clear internal communication can play an important role in retention strategies.



6. The role of corporate social responsibility, equality and inclusion

Across countries, factors related to corporate social responsibility (CSR) are generally seen as important by young private security workers. Many workers value the broader contribution their job makes to society and place importance on employers acting in a socially responsible and ethical way. Compared to these aspects, environmental responsibility tends to play a less prominent role.

- **Taken together, the findings suggest that young workers value employers who pay attention to their wider social role and ethical conduct. Clear and credible communication about CSR practices may therefore help strengthen the attractiveness of employers and reinforce workers' sense of purpose.**

Gender equality remains a very important matter. In several countries, a notable share of women report that they do not feel treated in the same way as men or offered the same opportunities. Perceptions tend to be more positive in participating Eastern European countries, but the overall picture points to ongoing challenges. This is particularly relevant in a sector that remains strongly male-dominated and that will need to attract more women in order to better reflect society as a whole.

- **The findings suggest that initiatives by Social Partners and companies on gender equality and non-discrimination remain important. Practical workplace measures, such as appropriate uniforms, occupational health and safety arrangements, and fair career practices, play a role in supporting more inclusive working environments.**

With regard to other groups, such as people with a migrant background, different religious beliefs, or LGBTQIA+ persons, the study indicates more limited awareness among workers. Compared to gender equality, respondents appear less confident in assessing whether workplaces fully reflect the needs and experiences of LGBTQIA+ workers or whether discrimination may occur.

- **This suggests that awareness-raising and information activities may help improve understanding and support more inclusive workplaces, ensuring that all workers feel welcome in the private security services sector.**

At the same time, it is important to recognise the limits of the data. Apart from responses from women on gender equality, the study does not capture the direct experiences of many groups potentially affected by discrimination. Responses therefore often reflect perceptions of workers who may not be personally exposed to unequal treatment, and hidden forms of discrimination may be under-reported.

- **These limitations underline the importance of continued efforts to promote diversity, equality and inclusion, as well as clear communication and education on these topics, in line with the CoESS and UNI Europa Joint Declaration on Promoting Diversity, Equality, Inclusion and Non-Discrimination in the European private security services sector (February 2024).**

- **Further research could help deepen Social Partners' understanding and support evidence-based action in this area.**



7. Perception of career development

Perceptions of working conditions, the extent to which expectations match reality, and the value workers attach to their role all influence how young workers view their future in the private security services sector. Building on these factors, this section looks at how career development and training shape longer-term perspectives.

Across countries, views on career development opportunities are mixed. Between around 20% and 45% of young workers report doubts about their future prospects in the sector, while a similar share - roughly 30% to 50% - perceive career opportunities as positive.

- **The findings suggest that clearer information on development opportunities, together with visible and accessible upskilling pathways, may help strengthen confidence in long-term career prospects.**

When asked about attractive career paths, young workers across countries frequently mention guarding services that involve more advanced or innovative solutions, such as the use of new technologies, including AI or drones. With some variations across countries, other areas of interest include Critical Infrastructure Protection, aviation security and mobile guarding.

- **This suggests that there may be potential to further develop and better communicate upskilling and reskilling pathways in these areas. Highlighting such opportunities could also support recruitment and image-building efforts, particularly by showcasing the diversity and professional development potential of private security work.**

Another consistent finding is the strong interest in leadership roles. Across countries, between around 56% and 72% of young workers express a willingness to take on leadership responsibilities. At the same time, only about half of respondents state that they clearly see themselves staying in the sector in the long term (five to ten years), while around 20% to 30% remain undecided.

- **This points to an opportunity for the sector to not only retain those already committed, but also to identify and engage workers who are still uncertain about their future. The high level of interest in leadership suggests that clearer career pathways, development opportunities and dedicated talent management may encourage longer-term engagement.**

Some workers however also highlight structural constraints, notably the limited willingness of clients to pay for higher-skilled security services.

- **This underlines the relevance of broader framework conditions, including public procurement practices that take quality and qualifications into account, as well as continued efforts to improve public recognition of the sector as essential to public security (see page 20).**

Overall, the findings suggest that career management, training and transparent development pathways can play an important role in shaping how young workers assess their future in the private security services sector – within the limits set by market and regulatory realities.

8. Possible areas for training reform

Quality training that reflects both market needs and workers' expectations is a central element of career development in the private security services sector. In almost all EU Member States, training is subject to national regulation. In most countries, sectoral Social Partners are involved in the design or organisation of training systems, often alongside other actors such as public authorities, police, chambers and educational institutions.

Overall, the majority of young workers in the six participating countries consider existing training programmes to be sufficient for performing their current tasks. At the same time, the study suggests that there is room for improvement, particularly in countries where a significant share of workers expresses dissatisfaction.

- **This points to the importance of regularly reviewing and, where appropriate, updating training systems. In this context, the INTEL project has already contributed through the Joint Statement by CoESS and UNI Europa on Promoting Quality Training and Relevant Curricula in Private Security Services (March 2026).**

Across countries, workers consistently identify regulatory knowledge, conflict management and de-escalation, as well as communication and people management skills, as the most important elements of both basic and additional training. This highlights the central role of soft skills in the sector. While many workers consider their training in these areas adequate, a notable share does not.

- **The findings suggest that training curricula should continue to reflect the importance of soft skills, particularly those linked to interaction with the public, conflict situations and daily people management – core aspects of private security work.**

IT skills are generally rated as slightly less important by workers for their current roles. At the same time, the study shows that perceived gaps are largest in this area. Only a minority of workers feel that the IT skills provided through training are sufficient, while in some countries more than half report the opposite.

- **This suggests a need for Social Partners and relevant authorities to assess whether current IT-related training content remains aligned with today's operational realities, and to review it regularly in light of ongoing technological developments.**

Around one quarter of interviewed workers also consider advanced digital skills, such as cybersecurity and AI-related knowledge, to be important for specific roles or career paths.

- **This points to the future relevance of integrating advanced digital skills into targeted, role-specific training pathways, particularly for more innovative or technology-driven security services. In the case of AI, this is also relevant in light of new legal requirements, including AI literacy obligations under the EU AI Act.**

The study further indicates that in countries without well-established vocational education and training (VET) and structured on-the-job training systems, workers express a stronger demand for practical training.

- **This suggests the value of better linking theoretical knowledge with real work situations and of promoting practical training approaches within national frameworks.**

Finally, attitudes towards digital learning differ across countries. Overall, workers tend to show openness or neutrality towards digital learning formats when used as a complement to in-person training, rather than as a full replacement.



9. Sectoral identity, public perceptions and the role of collective bargaining

Across all countries, young private security workers strongly identify with the value their work brings to public security and to society more broadly. Many express a clear sense of purpose and pride in contributing to safety, stability and the functioning of everyday life. This is also reflected in the high value workers attribute to the societal role played by their employers.

Taken together, the findings underline that private security services and their workforce play an essential role in supporting public security and enabling the smooth functioning of societies and economies.

- **The results suggest that the sector and its stakeholders could build more visibly on this strong professional identity. Highlighting the societal value of private security work in recruitment and employer branding may help attract new workers and strengthen commitment among existing staff.**

At the same time, most workers feel that this value is not sufficiently recognised in public discourse. Many perceive a gap between how they see their contribution and how private security is portrayed or understood by the public. This perception is also confirmed by workers' concerns that clients often prioritise lowest price over well-qualified personnel (see page 18).

- **While efforts to present a more accurate image of the sector are already ongoing, the findings suggest that further work may be needed to strengthen public understanding of private security as an essential service contributing to public security, resilience and preparedness.**
- **In this context, Social Partners have a role to play in engaging with media, policymakers and other stakeholders. More consistent and coordinated communication – through media relations, public affairs and stakeholder dialogue – may help align public perception more closely with the realities of modern private security services.**

In this context, Social Dialogue and Collective Bargaining play a central role. CoESS and UNI Europa underline that Social Dialogue is essential to promote quality services, fair working conditions and long-term sector sustainability – and, indirectly, to improve public recognition of the industry. The study shows that awareness of trade unions and Collective Agreements in the private security sector is generally high, with between around 74% and 84% of workers in most countries being aware of their existence. An important exception are countries without established sectoral Collective Bargaining structures, such as Croatia.

- **These findings suggest that Social Dialogue already enjoys a strong level of visibility and support among workers in many countries, and that it can be a key lever for enhancing long-term attractiveness, service quality and a fair adaptation of the sector to changing market realities.**
- **At the same time, they point to the need to further strengthen and promote Social Dialogue, particularly in countries where sectoral Collective Bargaining traditions and structures remain weak.**

A central underlying issue raised by the study concerns public procurement practices. Existing approaches that place strong emphasis on lowest price – often without sufficient consideration of the bidders' compliance with labour law or Collective Agreements – are widely perceived as limiting the sector's ability to invest in skills, training and good working conditions. Such practices also weaken Social Dialogue and indirectly affect how the sector is perceived by workers, clients and the public. In the previous EU-funded project INTEL: Skills Intelligence for the Private Security Services, Social Partners across Europe identified such procurement practices as a key barrier to addressing labour and skills shortages in the sector.

From the perspective of the Social Partners, procurement systems that give greater weight to bidder compliance with labour law and collective agreements (where they exist) and quality awarding criteria are more likely to support sustainable services and a positive image of the sector that does justice to the sector's value provided to society.

CoESS and UNI Europa, together with their members, continue to advocate for procurement approaches that better reflect the essential nature of private security services and the importance of quality, professionalism and skills – including through their Joint Statement on the Revision of the EU Public Procurement Directive (January 2026). These efforts are part of a broader objective to support a resilient and attractive private security sector in Europe.

10. Conclusion

Taken together, the findings show a sector with strong societal purpose and committed workers, but facing structural challenges that cannot be solved at company level alone. Addressing labour and skills shortages, improving attractiveness and strengthening public recognition requires a comprehensive approach that links people management, training, careers, Social Dialogue and public procurement reform.

Strengthening Social Dialogue and promoting quality-based procurement emerge as key levers to align workers' expectations, market realities and the essential role of private security services in Europe's security, resilience and preparedness.

About

Since 1992, CoESS and UNI Europa are actively involved in the European Sectoral Social Dialogue for the private security services sector.

CoESS

The Confederation of European Security Services (CoESS) is recognised by the European Commission as the EU employers' organisation representative in the private security services, covering 23 national associations in Europe and representing 45,000 companies with 2 million security officers.

UNI Europa

UNI Europa is the voice of 7 million service workers in 13 sectors that constitute the backbone of economic and social life across Europe – including private security. We coordinate the European Works Councils in the sector and European sectoral Social Dialogue committees.
www.uni-europa.org



www.securityskills.eu

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