

IP video surveillance The Holy Grail in Security ?

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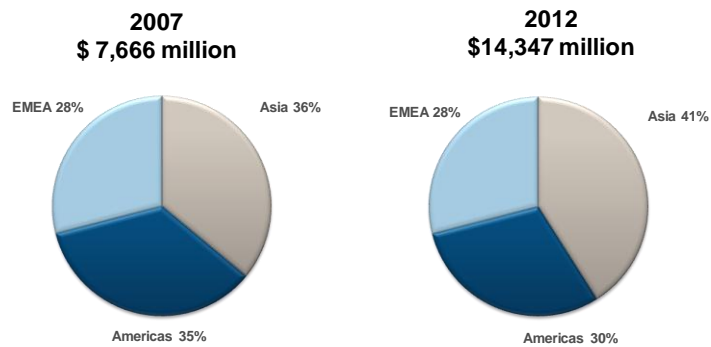
One Holy Grail, several knights...



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The world video surveillance market, 2007 - 2012



Source: IMS Research 2008

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Market shares for video surveillance equip. in 2007

Rank	Supplier 2007
1	Pelco
2	Panasonic (PSS)
3	Bosch Security Systems
4	Honeywell
5	GE Security
6	Axis Communications
7	Tyco Fire & Security
8	Samsung Electronics
9	Dedicated Micros
10	CBC
	Others

Source: IMS Research 2008

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Market shares for all cameras in 2007

Rank	Supplier 2007
1	Panasonic (PSS)
2	Pelco
3	Axis Communications
4	Bosch Security Systems
5	Sony
6	Samsung Electronics
7	Samsung Techwin
8	Honeywell
9	GE Security
10	Tyco Fire & Security
	Others

Source: IMS Research 2008

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Market shares for network cameras in 2007

Rank	Supplier 2007	Share
1	Axis Communications	33,5%
2	Sony	
3	Panasonic (PCC)	
4	Mobotix	
5	Panasonic (PSS)	
6	D-Link	
7	Bosch Security Systems	
8	Vivotek	
9	ACTi Corporation	
10	DVTel	
	Others	

Source: IMS Research 2008

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This is Axis

- > Founded in 1984
- > IT company driving the network video market
- > Worldwide presence in more than 20 countries, 754 employees*
- > Opening of 3 new offices during 2008
 - Moscow, São Paulo, Beijing
- > Global partnerships through distributors, resellers and system integrators
- > World's first network camera introduced in 1996



*March 31st , 2009

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What makes the difference

Global reach



Focus



Partner network



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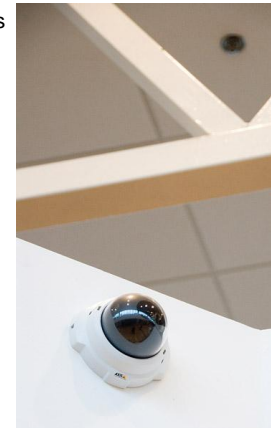
IP benefits for End Users



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1. Openness

- > Interoperability – The end of proprietary solutions
- > Endless possibilities of tailored solutions
 - 620 AXIS ADP partners in 45 countries
- > Scalability
- > Manageability
- > Lowest total cost of ownership



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ONVIF

- > A standardized interface supports the shift from analog to digital video surveillance in the security market
- > As the world leader in network video, it is natural to take a leading part in the standardization work
- > Initiated by Axis, ONVIF was launched with Bosch and Sony



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ONVIF – Latest news

- > 58 member companies, including the majority of the larger manufacturers of network video products.
- > Plans to release its test tool and conformance process in May
- > Axis will demonstrate a prototype of AXIS P3301 with support for the ONVIF specification at IFSEC.



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Standards

Networking		Security (networking)	Wireless	Compression	Resolution	Audio
802.3af	SMTP	HTTPS	WEP	JPEG	4CIF	G.711 PCM 64 kbit/s
IPv4/v6	FTP	SSL/TLS	WPA	MPEG-4	2CIF	726ADPCM32
HTTP	ICMP	802.1x	WPA2-PSK	H.264	CIF	or 25 kbit/s
TCP	DHCP				QCIF	
SNMP	UPnP				VGA	
RTSP	Bonjour				SVGA	
RTP	ARP				720p	
UDP	DNS				1080i	
IGMP	DynDNS					
RTCP	SOCKS					



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2. Intelligent Video

- > Analytics modules available in the products or developed by 3rd parties
- > Capabilities :
 - Automatically analyzes and tags surveillance video in real-time
 - Detects suspicious activities
 - Initiates video recording, alarms or other actions
 - Alerts operators or field personnel



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Benefits of Intelligent Video

- > Available 24/7/365
 - Relieves burden from operators
 - Information when you need it
 - Minimizes human errors
- > Creates new business possibilities
 - Store optimization in retail, cue management in transportation, etc.
- > Enables users to be proactive
 - Preventing crime rather than reacting after the fact
- > Lowers the total cost
 - More efficient use of staff
 - Reduced network load and storage needs
 - Faster return-on-investment



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3. Technological Evolutions

Main Drivers

- > Dramatically increased processing power
- > Rapid sensor development

Resulting in

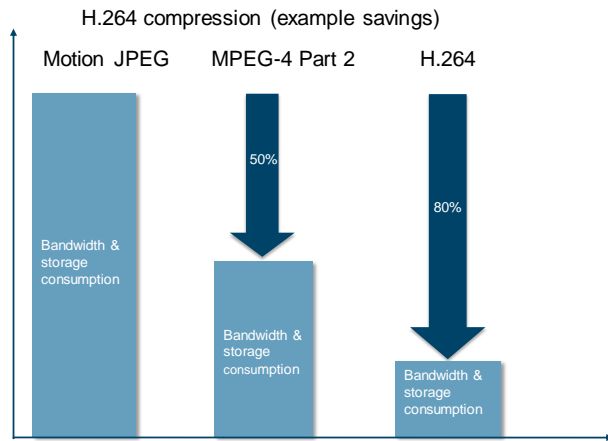
- > Better image quality in all products
- > HDTV and Megapixel network cameras at full framerate in all price ranges
- > Higher built-in capacity for processing of video analytics



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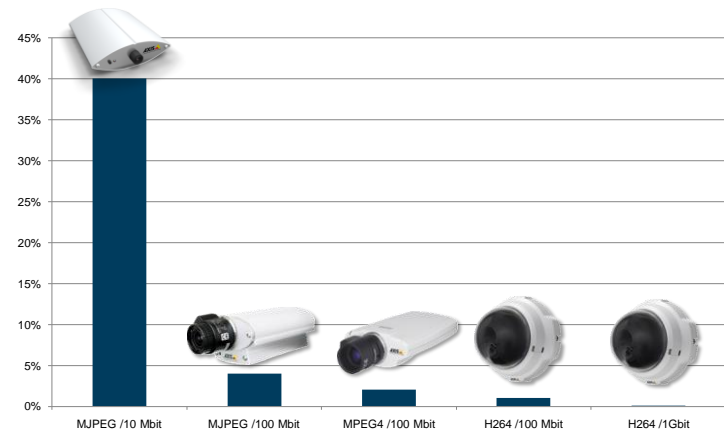
H.264 – the ultimate video compression



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LAN bandwidth – more than we need!



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Resolution

- > Our main competition is still based on the 1940 standard
- > We will, of course, add even more megapixel products for the future
- > This will be done in a balanced way, not just "thousands of Mpixels"
- > Lenses and applications set limits

- > Anyone bought a non-HD TV lately?
- > Analog TV soon phased out in broadcast – already done in Europe, soon in the US!



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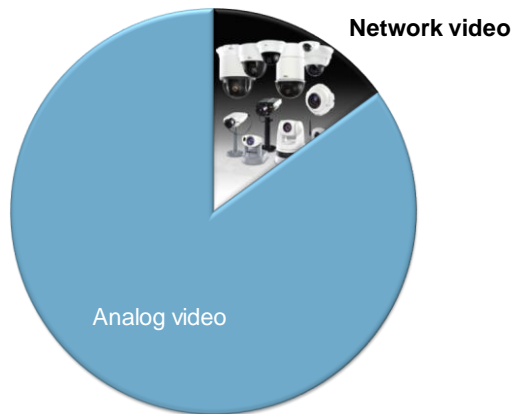


It's time to go IP !



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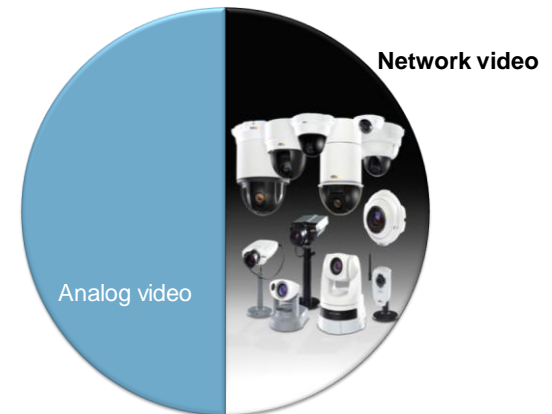
Video surveillance market, 2008



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Video surveillance market, 2012/2013



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Convergence Analog/Network Cameras – Benelux

Source: IMS Research
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Emerging market trends

Better Image Quality

HD / Megapixel

Compression

Intelligence

Install Ready



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Where are the technology drivers ?

- > Consumer electronics!
- > In the consumer space...
 - Who buys a non HD-ready TV?
 - Where does the H264 standard originate?
 - An iPod without AAC compression?
 - Would you buy a non-megapixel digital camera?
 - Wouldn't you like a notebook with SSD memory?
- > Now you see where networked video is headed!



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Video Analytics a driver?



Any terrorists?



Who's who?



Aggressive behavior?



Bag left behind?

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Video Analytics as a driver!



People Counting



Perimeter protection



Motion Detection



Active Tampering

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Questions & Answers

Thank you!



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