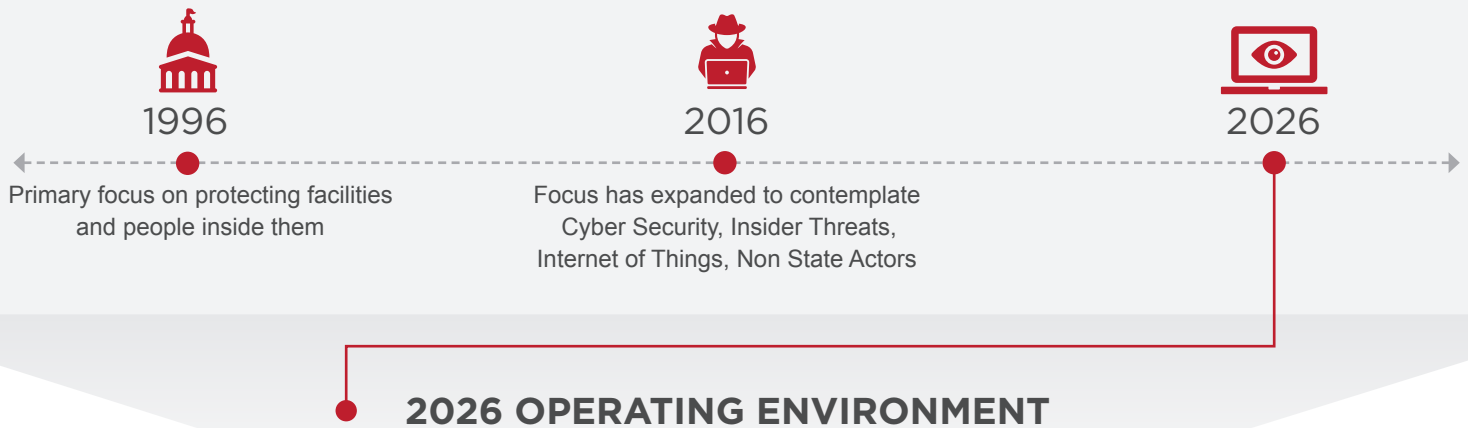


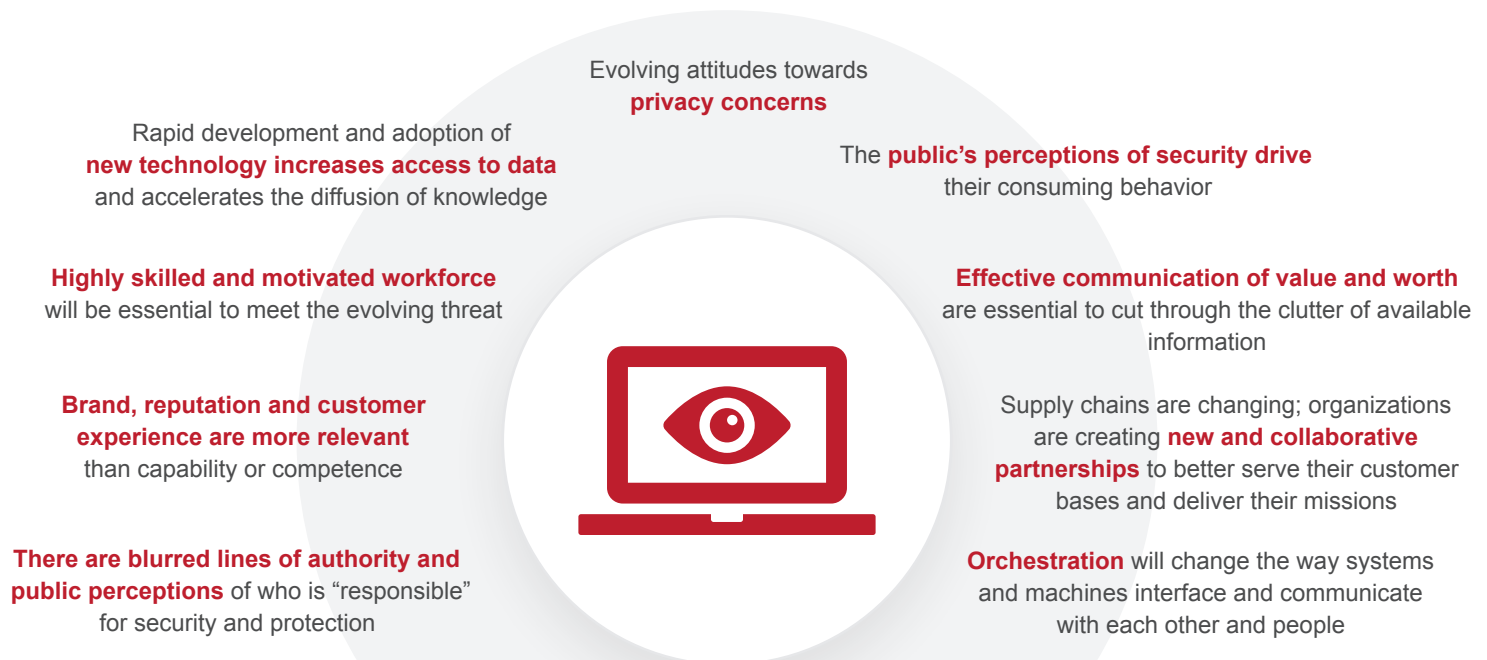
THE FUTURE OF SECURITY AND PROTECTION

Toffler Associates interviewed hundreds of subject matter experts to develop a perspective on the Future of Security and Protection. Combined with our deep understanding of drivers shaping the future and our ALTERNATE FUTURES® scenario planning approach, we have begun to imagine what security and protection will look like in 2026.

The security and protection environment has rapidly evolved over the last 20 years as the explosive shift from protecting people and places has expanded to include the intersection of people, buildings and assets, systems, and information.



In 2026, the security and protection market will be defined by massive information overload – information will be weaponized and misinformation is routinely damaging to brand security and reputation. **Individuals are hyper-empowered and will remain an organization's largest vulnerability.** Vulnerabilities are not limited by industry or scale. Individual consumers, the federal government, and all industry sectors are targets in this contested environment and each advancement creates a potential vulnerability to assets, people, and information. A breach of security can and will harm an organization's brand, disrupt their operations, and ultimately impact oversight and governance in the operating environment.



The evolving and complex nature of threats and vulnerabilities will continue to accelerate, creating a more competitive protection market landscape. Innovative approaches to security and protection will be differentiators and distinguish successful organizations from the obsolete. To excel in this environment, organizations must begin today, using strategic foresight to understand and prepare for market shifts.

CRITICAL FACTORS

Shifts in the security and protection market create impacts to the value of an organization. These shifts are influenced by specific critical factors.



Scarcity

- Climate change affects quantity, quality, and location of resources
- New technology requires new materials
- Wealth and value redefined in a changing world



Privacy

- Aggregation of information by corporations
- Big Data drives everyday life
- Ubiquity of shared data— location, financial, health



March of Knowledge

- “Knowing more” feels less secure
- Heightened sense of lack of control
- Technology in the hands of the many



Diffusion of Power

- The ability to threaten security is increasingly in the hands of non-state actors
- Changing technology creates emerging threats



Conflict

- Information explosion creates heightened perceptions of conflict and threat
- Small scale, asymmetric incidents spread conflict from traditional battlefields

DRIVERS

We have identified multi-dimensional drivers as a way to understand why change happens; these drivers are deeper than trends. There are three compounding drivers that create the groundswells that will cause dynamic changes in the security and protection market.

1 Authority

The manner and degree by which **security and safety responsibilities** are assigned, empowered, and exercised.

2 Threat Uncertainty

An individual's **perception of the security and protection** environment and alignment with the reality of the actual environment.

3 Pace of Change

The pace and predictability of changes in **knowledge, technology, and innovation** within the security and protection environment.

Convergence of drivers and the groundswells they represent highlight that authority, threat uncertainty, and the pace of change will require organizations to approach security and protection in a more all inclusive and systematic way in order to protect their brand reputation and fulfill evolving customer expectations.

QUESTIONS FOR SUCCESSFUL ORGANIZATIONS

What are your most critical and valuable assets?

What actions have you taken to identify and understand what is driving the market?

How do you define your role and articulate your particular value?

What have you done to ensure that your protection and resiliency efforts are scalable, flexible, and proactive?

How do you collaborate with cross-industry and sector partners to augment your offering?

How have you explored new technologies to take a more holistic and adaptive approach to security and protection?

Successful organizations understand that a culture of security and protection begins at the top and innovative approaches are differentiators in a competitive and complex environment: How will you invest in transforming your organization?