



# **The International Market for Humanitarian Demining Equipment and Technology**

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# Introduction



- **Terms of Reference & Definitions**
- **Demand for Equipment & Technology Exists**
- **Supply is Abundant but Not Strategic**
- **Market is Small and Inefficient**
- **Summary**
- **Trends for the Future**



# Terms of Reference & Definitions



- **Engaged by Government of Canada**
  - Assessment of the market
  - NOT a technical assessment of specific technologies or equipment
- **Little or no “Hard Data”**
  - Findings based on interviews and anecdotal evidence
- **Definitions:**
  - Humanitarian Demining vs. Mine Action
  - Equipment vs. Technology



# Demand for Equipment & Technology Exists



- **Disagreement about value of technology**
- **Key players dictate demand**
  - NGOs, Companies, Militaries, MACs
- **Demand is scenario & cost dependent**
- **Technology gaps**
  - Close-in mine detection
  - Area reduction
- **Conclusion about Demand**



# Supply is Abundant but Not Strategic



- **Fragmented supply and R&D**
  - Governments
    - National vested interest
  - Companies
    - Demining as a side-line business
  - NGOs
    - A small portion of supply
  - Development approach
- **Communication between developers & users**



# Supply is Abundant but Not Strategic



- **Dual-use technologies**
  - Military – Humanitarian
  - Adapting mature commercial technologies



- **Types of equipment & technology**
  - Large-scale machines & technology
  - Mine action tools & equipment
  - General operating equipment



- **Conclusions about supply**



# Market is Small and Inefficient



- **Market is small and shrinking**
- **Demand factors limiting size of market**
  - Scenario dependence
  - Socio-economic impact
  - Size of demining community
  - Demand volumes are relatively small
- **Supply factors limiting size of market**
  - Donor funding practices
- **Market operates inefficiently**



# Summary



- **Factors that encourage adoption**
  - Faster, cheaper, safer
  - Robustness
  - Durability
  - Sustainability
  - Simplicity
  - Demonstrated effectiveness – credible field tested
  - Engaging user groups at development stage
- **Barriers to adoption**
  - Limited and irregular purchasing power
  - Skepticism of user groups
  - Poor information / communication





# Trends for the Future



- **Donor sophistication / awareness**
- **International standards**
  - IMAS
  - ITEP
- **Coordinated international approach**
  - Understand the impact of mines
  - Assess what is needed to address problem
  - Identify what is currently available
  - Redirect efforts to gaps in equipment, technology and funding
  - Coordinate procurement & disbursement

