The International Market for Humanitarian Demining Equipment and Technology

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January 30, 2002
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
• **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