



**An tÚdarás Slándála Príobháidí**  
**The Private Security Authority**

# **RESEARCH REPORT 2021**



**The Impact of COVID-19 on  
Licensed Security Contractors in Ireland**

## Contents

Context.....	3
Aim and objectives of the research .....	3
Methodology.....	3
Questionnaire .....	3
Data collection .....	4
Responses received.....	4
Preparation and analysis of data .....	5
Limitations.....	5
Characteristics of respondents .....	7
Impact of COVID-19 on trading and turnover .....	8
Trading status.....	8
Business costs compared with turnover.....	8
Turnover.....	9
Risk of insolvency.....	11
Challenges and supports.....	12
Government supports.....	13
Changes in workforce in response to COVID-19.....	13
Changes in work practices .....	14
Satisfaction with response by the PSA.....	16
Commentary .....	16
Examples of commentary in respect of fees .....	17
Communication.....	18
Commentary in respect of lack of fairness .....	19
Commentary in respect of audits .....	20
Summary .....	21
References .....	22
Contacts .....	23

## **Context**

The Private Security Authority (PSA) is the statutory body with responsibility for licensing and regulating the private security industry in Ireland. The PSA is an independent body under the aegis of the Department of Justice. Established following the passing of the Private Security Services Act in 2004, the PSA started licensing security contractors in 2006 and security employees in 2007. The Private Security Authority commissioned this research from Research Matters, an independent research company, to examine the impact of COVID-19 on their licence holders.

In February 2020, the COVID-19 pandemic arrived in Ireland which led to significant illness and death amongst the Irish population, particularly those considered vulnerable. In order to maximise protection from the virus the Government introduced a range of measures including workplace lockdowns, social distancing, handwashing, avoiding crowded areas and limiting the amount of time spent in direct contact with other people. Many businesses were required to close for significant periods of time in both 2020 and in 2021 and this resulted in widespread economic disruption.

In parallel, the Government put in place a range of enterprise and labour market supports which recognised that some businesses had been more significantly impacted by restrictions than others, particularly public-facing sectors where there was a disproportionate impact. Across 2020 and 2021, €38 billion was provided for COVID-19 related supports, including wage subsidy schemes, grants and credit schemes (1).

## **Aim and objectives of the research**

The purpose of this research is to provide an understanding of the impact of COVID-19 on licensed security contractors in Ireland and specifically to:

1. ascertain the financial impact on business;
2. identify challenges contractors have faced;
3. characterise statutory supports received; and
4. describe the views of contractors about the support received from the PSA throughout the pandemic.

## **Methodology**

The study adopted an online survey method which mainly collected quantitative data, although a small amount of qualitative data was also collected. The survey was carried out over eight days in July 2021 and the online survey method ensured sufficient data could be collected within the required four-week time period for the development, implementation and reporting of survey.

## **Questionnaire**

The questionnaire was developed in consultation with the PSA. The development of the questionnaire took account of best practices in the area (2) and consideration was given to:

- question content;
- question wording;
- form of response to the question; and
- place of the question in the sequence.

As far as possible, previously used questions were included in the questionnaire. A range of Irish and international surveys were reviewed and where appropriate, questions from these were included in the survey. These surveys included, for example, questions from the Central Statistics Office's (CSO) Business Impact of COVID-19 Survey (3), the Central Bank survey of COVID-19 on Irish SMEs (4), the UK Office for National Statistics business insights survey (5), IBEC (6), The Economic Policy Centre, Northern Ireland(7) and the UNC Kenan Institute of Private Enterprise (8). Government supports for Irish Businesses were also reviewed and key provisions identified (9).

The survey questionnaire included 17 questions, and a high proportion of Likert scales and multiple-choice questions were used to reduce the length of time required for completion. Questions relating to the size of the business and the sector were mandatory and respondents could not proceed to complete the survey without first entering a response to these questions.

Because of changes in the course of the pandemic over the last 18 months, information was sought about two different time periods for a number of questions. These two time periods relate to February to December 2020 and January to July 2021. These two periods are referred to throughout this report as 2020 and 2021.

### **Data collection**

The database of private security licence holders held by the PSA formed the sampling frame for this survey. In order to ensure the requirements of GDPR were adhered to, the invitation to complete the online survey questionnaire was issued by the PSA to 1,461 contractors.

Pilot testing of the survey information, data collection method and questionnaire was conducted prior to the main survey taking place and following responses from seven respondents, minor changes were made to the questionnaire. A preliminary email was issued informing licence holders that the survey would be conducted and a reminder was sent prior to the closing date. The main data collection period took place over eight days from 22<sup>nd</sup> to 30<sup>th</sup> July 2021. All the data was collected electronically using SurveyMonkey™.

### **Responses received**

In total, 407 responses were received. Incomplete questionnaires (participants who had completed less than 45% of the questionnaire; n = 100) were removed giving a final dataset of 307 respondents.

## **Preparation and analysis of data**

The data was exported from the internet survey provider (SurveyMonkey™) and prepared for entry into R statistical package. Open-ended and unstructured question responses were coded and analysed separately.

Nominal, ordinal and interval data was generated in the course of the research and descriptive statistical analysis was conducted on each. Graphs and tables are presented throughout the report.

## **Limitations**

All research has some limitations. An online survey can be efficient for researchers and convenient for respondents. It allows a shorter time frame for data collection than more traditional methods and it allows for a substantial amount of information to be collected and easily prepared for analysis. The brief for this study required that it be completed within a four-week period and this was a key driver in adopting an online approach to data collection.

It is possible that businesses on whom COVID-19 had an impact may have been more likely to have responded to this survey. While it is difficult to control for this, the survey does contain a spread of responses across all business sizes, sectors, regions and length of time with a PSA licence. A common limitation relating to online surveys relates to the anonymity of the data collection resulting in a higher risk of respondents who may not be who they say they are and who may not answer truthfully. At the beginning of this survey, the researchers included a small number of mandatory questions relating to business size and sector. In addition, a number of checks and balances were built into the questionnaire, designed to enable any discrepancies in responses to be identified. The findings showed high levels of consistency across sectors and business size.

Despite these limitations, the findings can provide a good understanding of the extent to which COVID-19 impacted on PSA licence holders.

# Findings

## Characteristics of respondents

About 61% of those who responded reported their business was a company (61%), while about 3% reported being in a partnership. Just over 60% of questionnaires were completed by the owner of the business (62%) and almost one third of respondents (32%) indicated they did not have any employees. About one third of respondents (34%) reported their business was based in Dublin and less than 10% in Connaught or in the three counties of Ulster (Cavan, Donegal, Monaghan). The highest percentage of respondents worked in the area of Alarm installation (21%) followed by CCTV installation (20%) (Table 1).

**Table 1 Characteristics of the respondents**

<b>Is your business?</b>	<b>%</b>		<b>Role in business</b>	<b>%</b>
A sole trader	36%		Owner	62%
Company	61%		Company Director	26%
Partnership	3%		Senior Manager	7%
			Other Manager	5%
<b>What is your main industry?</b>			<b>How many, if any, employees does your business have?</b>	
Alarm installer	21%		None	32%
CCTV installer	20%		1-9	50%
Security guarding	13%		10-49	11%
Private investigator	12%		50-249	4%
Locksmith	10%		250+	3%
Access control installer	8%		<b>Where is your business?</b>	
Alarm monitoring	1%		Connaught	8%
Cash in transit	1%		Dublin	34%
Door supervisor	1%		Munster	23%
Event security	1%		Rest of Leinster	24%
Other	12%		Ulster (Cavan, Donegal, Monaghan only)	8%
<b>How long have you held a PSA licence?</b>			Prefer not to say	4%
Less than 1 year	6%			
1-2 years	7%			
3-4 years	21%			
5-10 years	30%			
More than 10 years	36%			

*\*Totals may not add to 100% due to rounding*

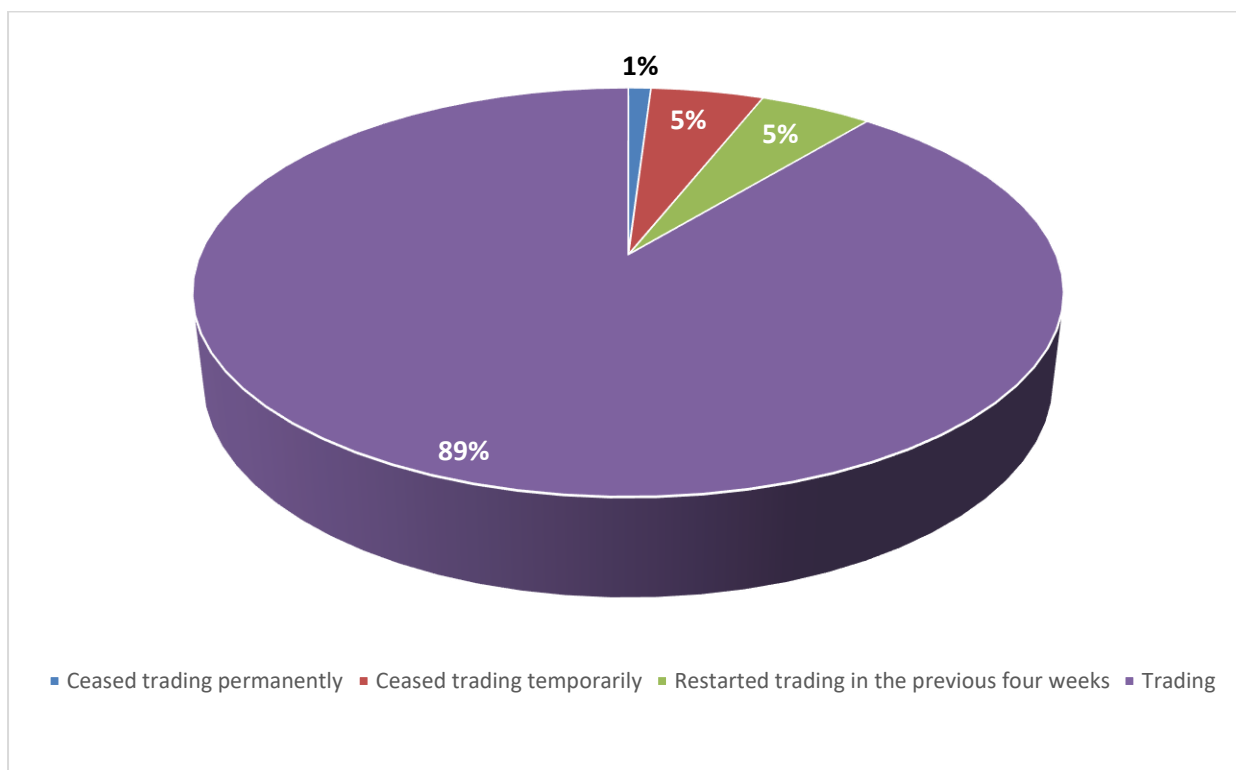
## Impact of COVID-19 on trading and turnover

This section presents the findings from the questionnaire survey relating to trading status, turnover, business costs compared with turnover and percentage increases / decreases in expected turnover in 2020 and to date in 2021.

### Trading status

Respondents were asked to indicate their trading status of their business. As highlighted in Figure 1 the vast majority of business reported they were trading (89%).

**Figure 1 Percentage of respondents according to trading status of business**



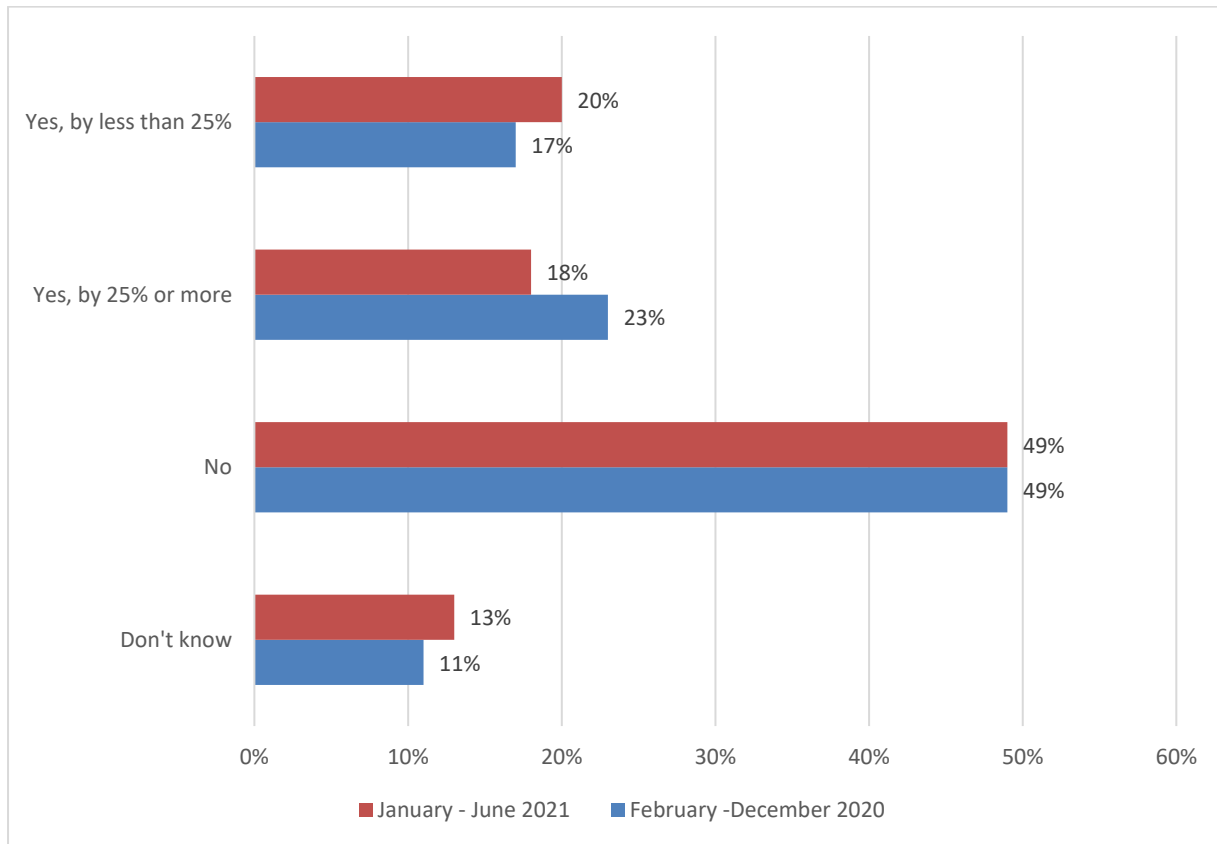
About 5% reported they had ceased trading temporarily while a further 5% reported they had restarted trading in the previous four weeks. One per cent reported they had ceased trading permanently.

### Business costs compared with turnover

Respondents were asked to indicate whether their business's costs had exceeded their turnover during the COVID-19 period over the two time periods in 2020 and 2021. Just under half of respondents (49%) who answered this question reported their business costs had not exceeded turnover for either time period (Figure 2).



**Figure 2 Percentage of respondents indicating according to whether their business costs exceeded turnover between February to December 2020 and January to June 2021**



There were slight differences in terms of the extent to which turnover exceeded business costs depending on the time period in question. A higher proportion of respondents (23%) indicated their business costs had exceeded their turnover by a quarter or more in 2020 compared with 2021 (18%). The opposite was the case in respect of those reporting their business costs exceeded turnover by less than 25% in both time periods (17% in 2020 compared with 20% in 2021).

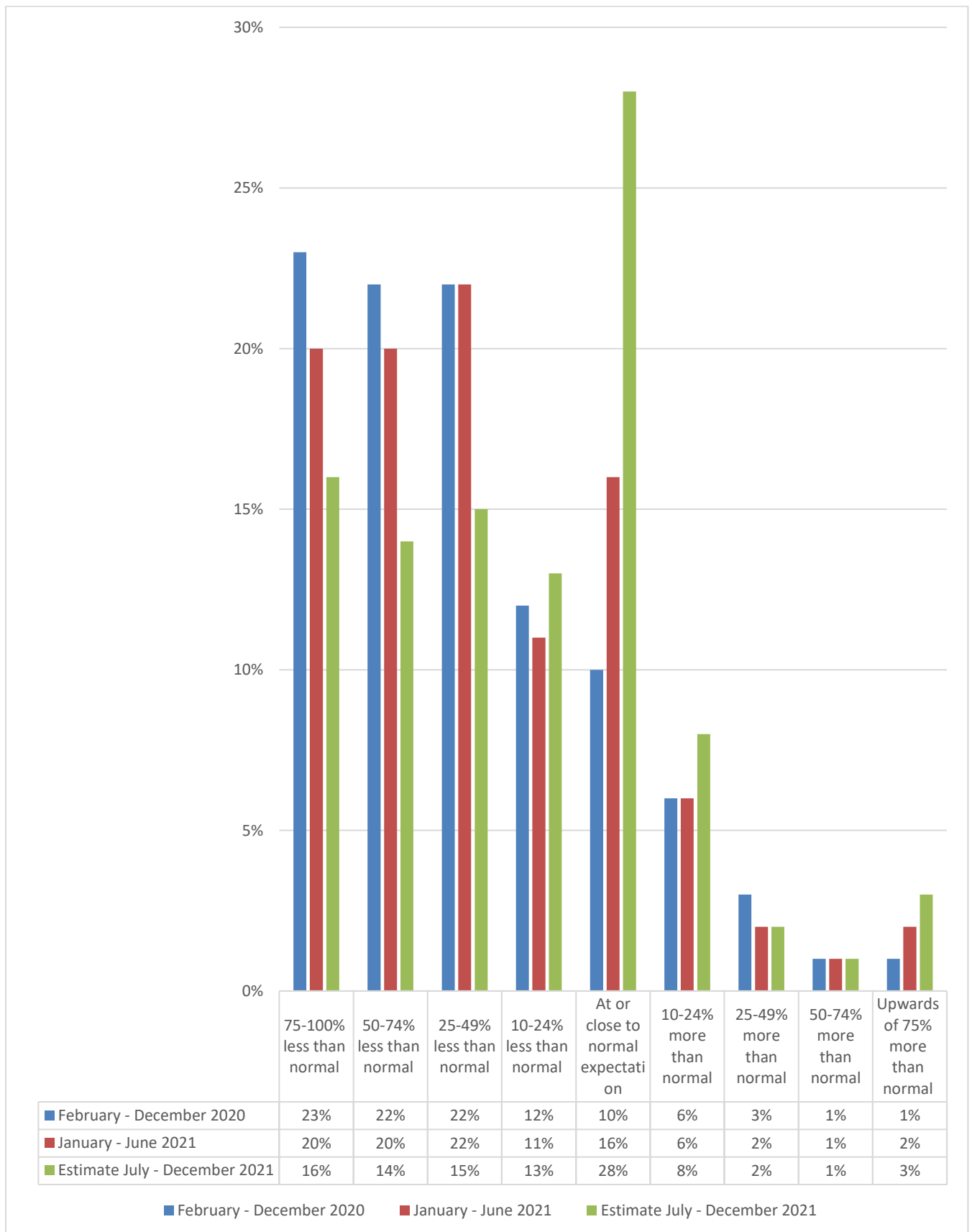
More than one in ten respondents indicated they did not know the answer to this question.

### Turnover

Respondents were asked to indicate whether their turnover was at, close to, or lower than expected for 2020 and 2021 and to estimate what the situation would be between July and December 2021. The vast majority of respondents reported that their turnover was lower than normal in 2020 (79%) and 2021 to date (73%). Just over one in ten respondents indicated it was higher than normal to date (11%).

One in ten respondents (10%) indicated their turnover was at or close to expectations in 2020 and this increased to 16% for the January to June period of 2021. There is some optimism in respect of the estimated turnover for the remainder of the year with more than one quarter (28%) of respondents indicating they expect their turnover to be near or almost normal (Figure 3).

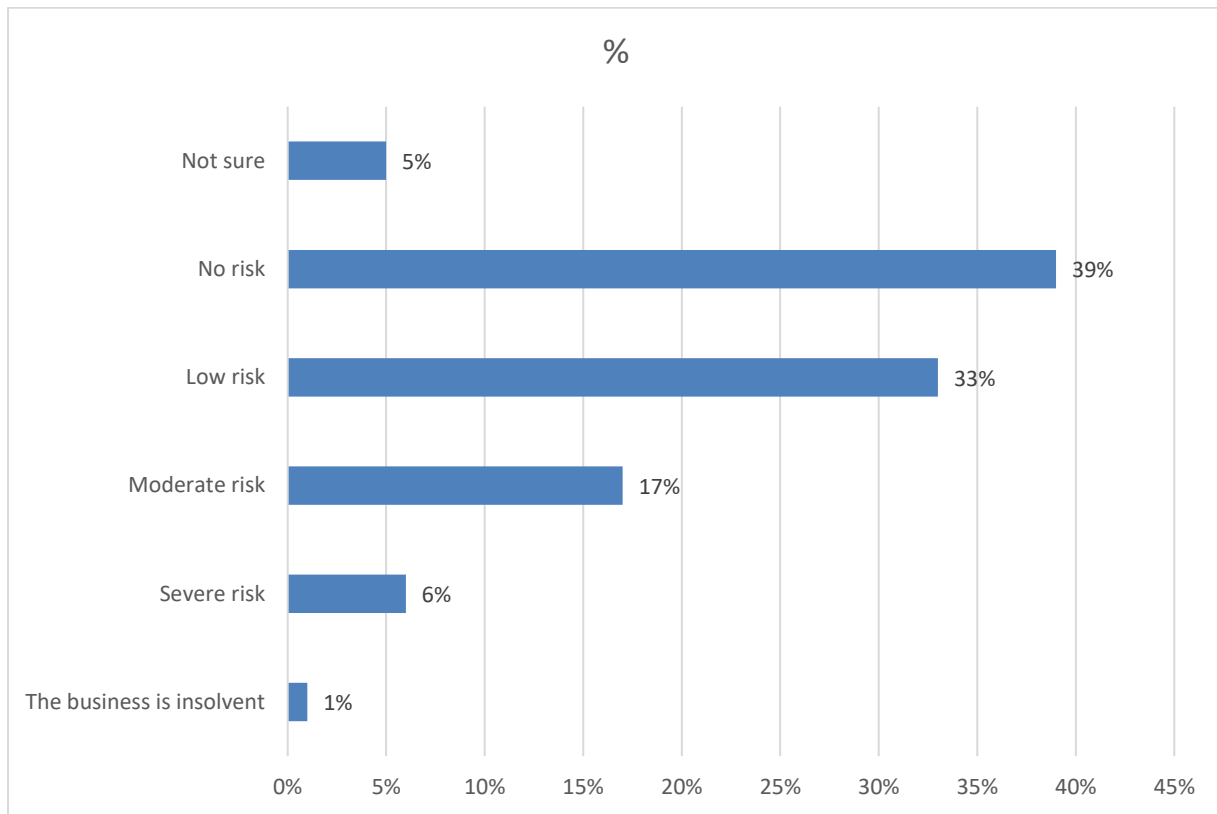
**Figure 3 Percentage of respondents reporting of estimated turnover over three time periods**



## Risk of insolvency

Although over 70% of respondents indicated their business was at 'low' (33%) or 'no risk' (39%) of insolvency, 6% of businesses reported their business was at 'severe risk' of insolvency and 1% indicated that their business was already insolvent. Five per cent reported they were 'not sure' what the risk of insolvency of the business was.

**Figure 4 Percentage of respondents according to risk of insolvency**



## Challenges and supports

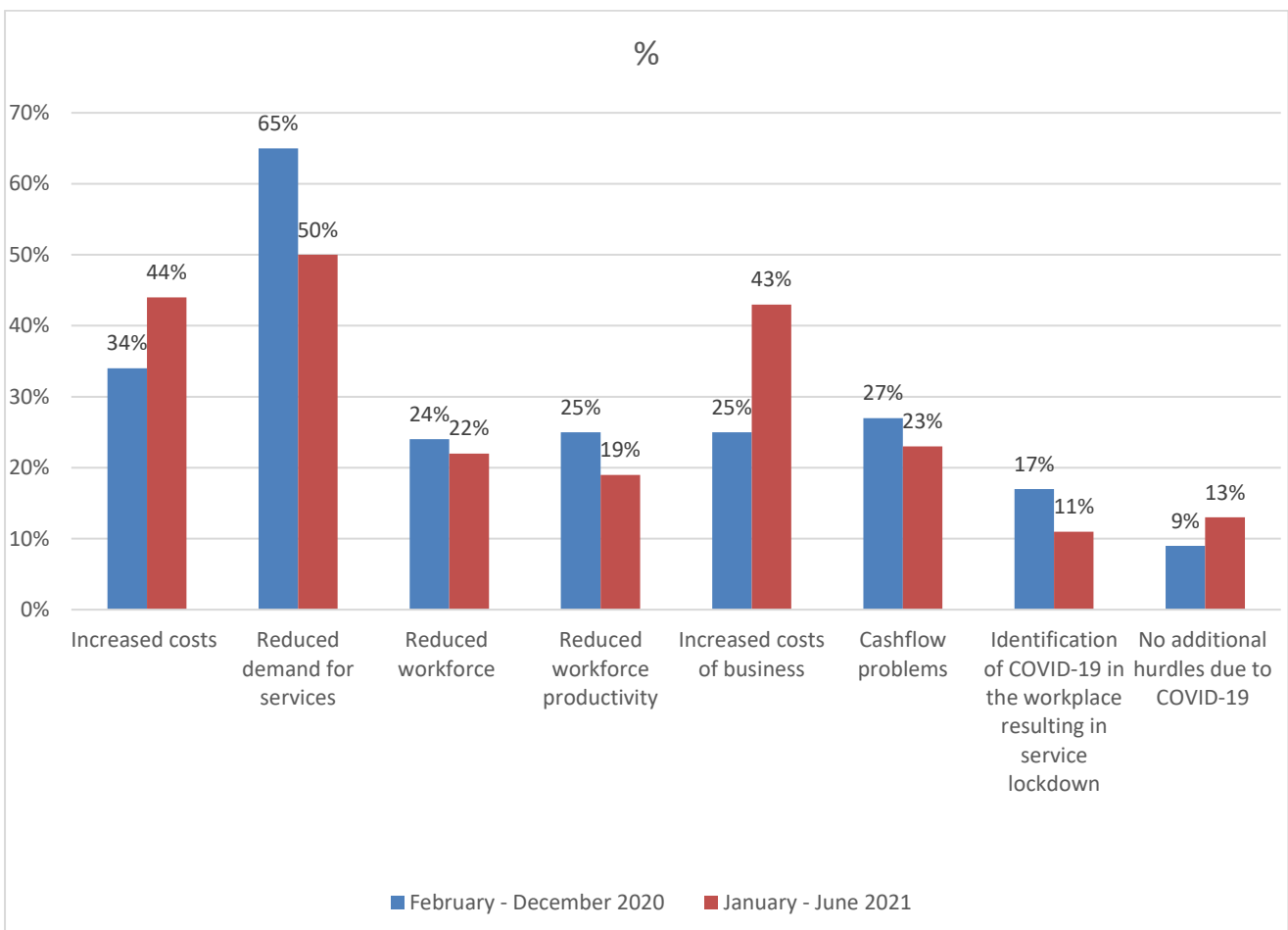
Respondents were asked to indicate whether they had experienced a number of different challenges and the findings show that respondents reported an average of two challenges arising.

The most common challenge experienced throughout the pandemic was a reduced demand for services and this was reported by almost two-thirds of respondents in 2020 (65%) and by half of respondents (50%) in the January to June 2021 period.

Increased costs were reported to be higher in the January to June 2021 (44%) period compared with 2020 (34%) and this pattern was the same for increased costs of doing business (25% and 43% respectively). Cashflow problems were reported by 27% of respondents in the 2020 period and by 23% in 2021 to date.

Almost one in five respondents (17%) reported that the identification of COVID-19 in the workplace had resulted in service lockdown in 2020 compared with just over one in ten (11%) from January to June of this year (Figure 5).

**Figure 5 Percentage of respondents reporting challenges arising over two time periods**



## Government supports

About one third of respondents (31% in 2020 and 33% between January and June 2021) indicated that their business or its employees had not availed of any supports identified in the questionnaire. The temporary COVID-19 Wage Subsidy Scheme was the only support highlighted by more than 10% of respondents and this was accessed by almost 50% (49%) in 2020 compared with less than one third (32%) between January and June 2021 (Table 2). The second most common support accessed was the restart grant provided by Local Authorities and this was accessed by 7% in 2020 and less than half that between January and June 2021 (Table 2).

**Table 2 Percentage of respondents according to the question ‘Has your business or its employees availed of any of the following government supports in light of COVID-19 in 2020 / 2021?’**

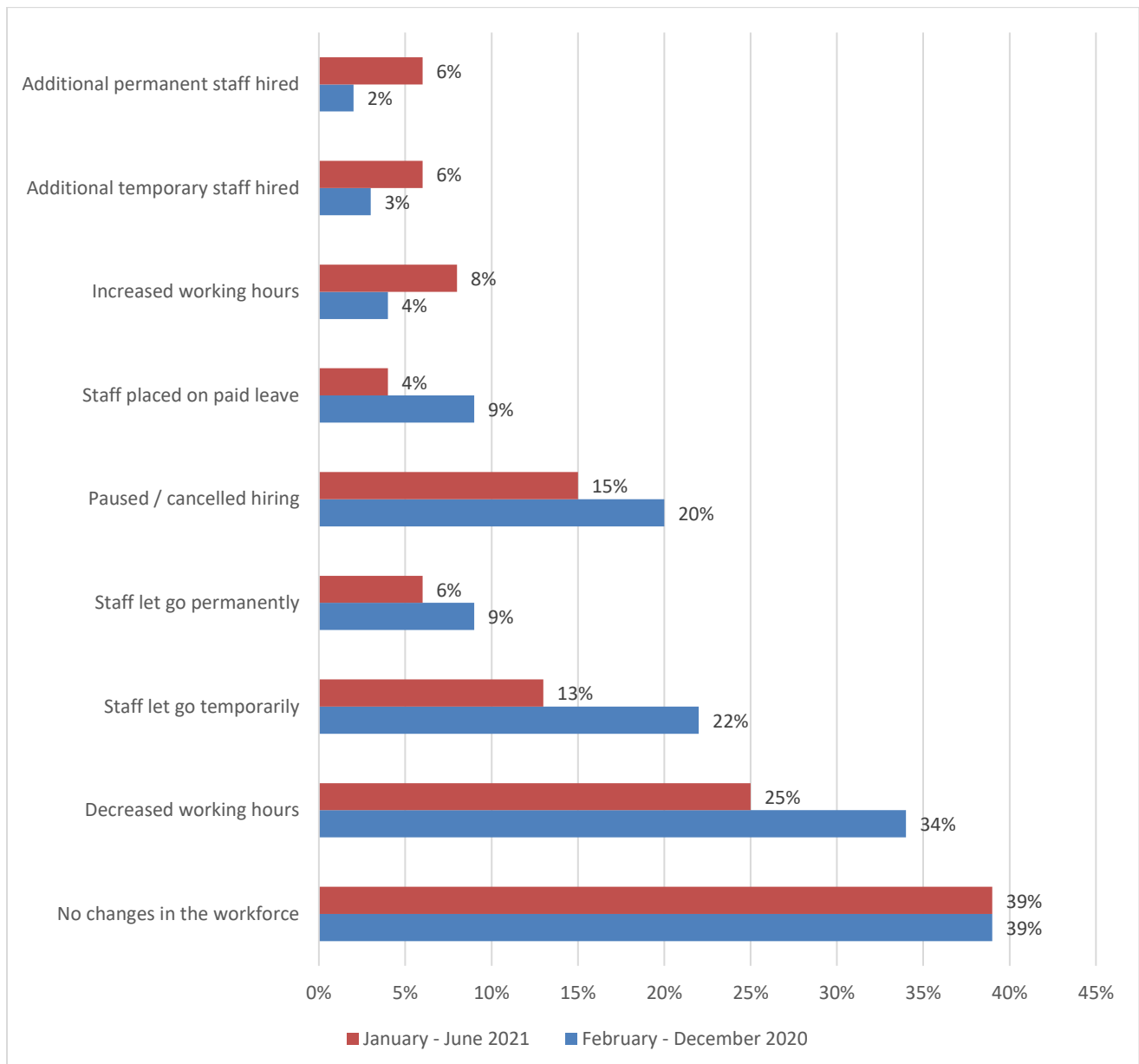
	February - December 2020	January - June 2021
Temporary COVID-19 Wage Subsidy Scheme: February - December 2020	49%	32%
COVID-19 Working Capital Loan Scheme (SBCI) COVID-19: February - December 2020	2%	2%
SME Credit Guarantee scheme (DBEI) Revenue: February - December 2020	1%	0%
Business Financial Planning Grant (Enterprise Ireland): February - December 2020	2%	1%
Restart Grant (Local Authority): February - December 2020	7%	3%
None of the above: February - December 2020	31%	33%

## Changes in workforce in response to COVID-19

About 40% of respondents indicated there had not been any changes in the workforce in response to COVID-19. About one third of respondents reported decreased working hours in 2020 and this was higher than that reported for 2021 to date where this was identified by one quarter (25%) of respondents. About one fifth of respondents (22%) reported they had let staff go temporarily in 2020 compared with 13% between January and June 2021. Nine per cent let staff go permanently in 2020 and this was reported by 6% in the period January to June 2021. About one fifth of respondents reported they paused or cancelled hiring staff in 2020 compared to 15% in 2021.

Between 6% and 8% of respondents reported increased working hours (8%), and additional temporary (6%) and permanent (6%) staff hired between January and June 2021, and this was higher than that reported for 2020 (2%-4%) (Figure 6).

**Figure 6 Percentage of respondents reporting changes in their workforce as a result of COVID-19**



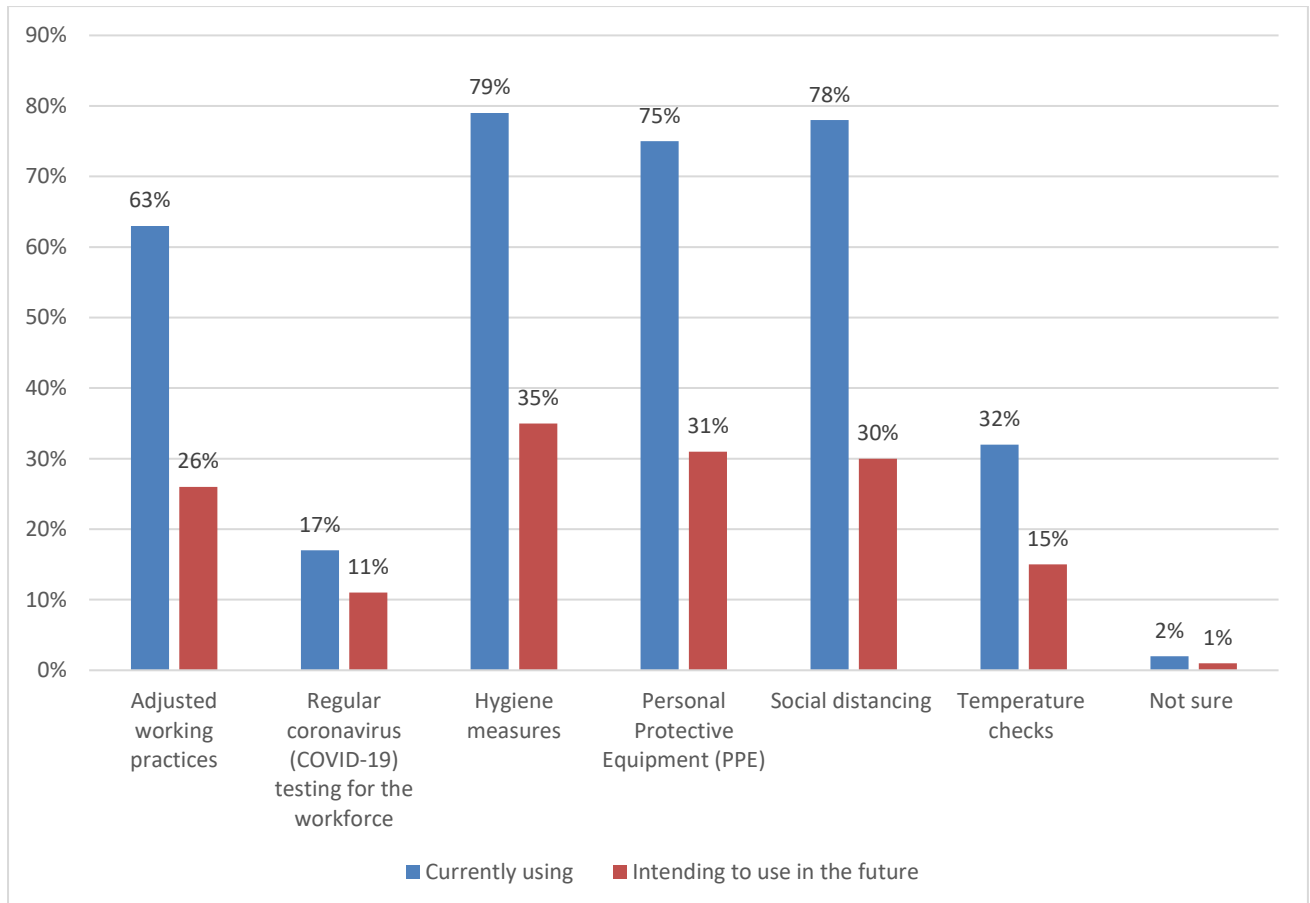
### Changes in work practices

In response to the question about whether the business is using, or intending to use specific safety measures in the workplace, about two-thirds of respondents (63%) reported they currently had adjusted working practices and just over one quarter (26%) intended to do so in the future.

Hygiene measures (79%), social distancing (78%) and the use of personal protective equipment (75%) were reported to be currently in use. The proportion who intended to use these in the future was considerably lower at 35%, 30% and 31% respectively. Temperature checks were reported to

be currently in place by just under one third of respondents (32%) and about half this percentage intended to use this measure in the future. About 17% of respondents reported carrying out regular coronavirus (COVID-19) testing for the workforce and about 11% intended to do so in the future (Figure 7).

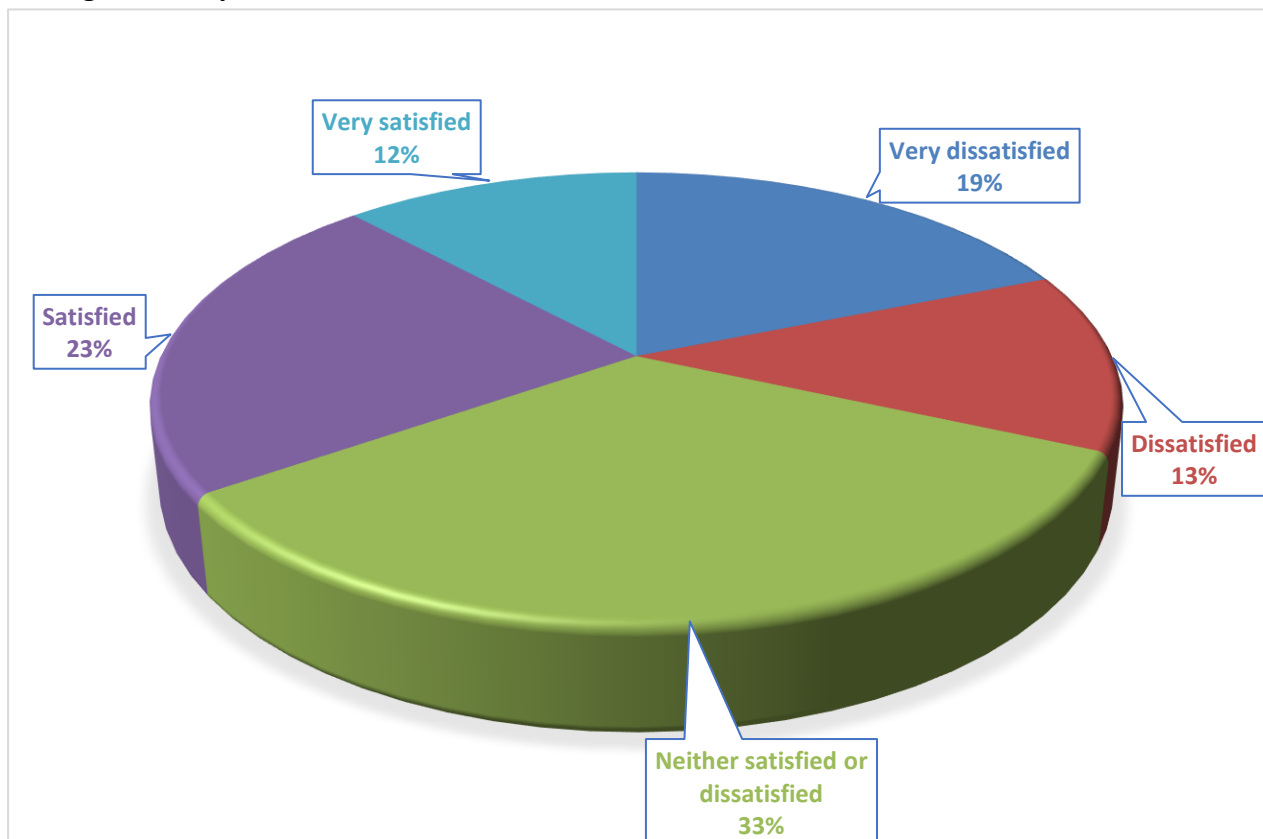
**Figure 7 Percentage of respondents reporting current and intended changes in work practices in response to COVID-19**



## Satisfaction with response by the PSA

In response to a question of ‘How satisfied are you that the Private Security Authority has done all you believe they can / should do to support you throughout the COVID-19 pandemic?’ about one third of respondents indicated they were satisfied (23%) or very satisfied (12%), a further third (33%) indicated they were neither satisfied or dissatisfied (32%) and the final third reported to be either dissatisfied (13%) or very dissatisfied (19%) (Figure 8).

**Figure 8 Percentage of respondents reporting satisfaction with the PSA support to licence holders throughout the pandemic**



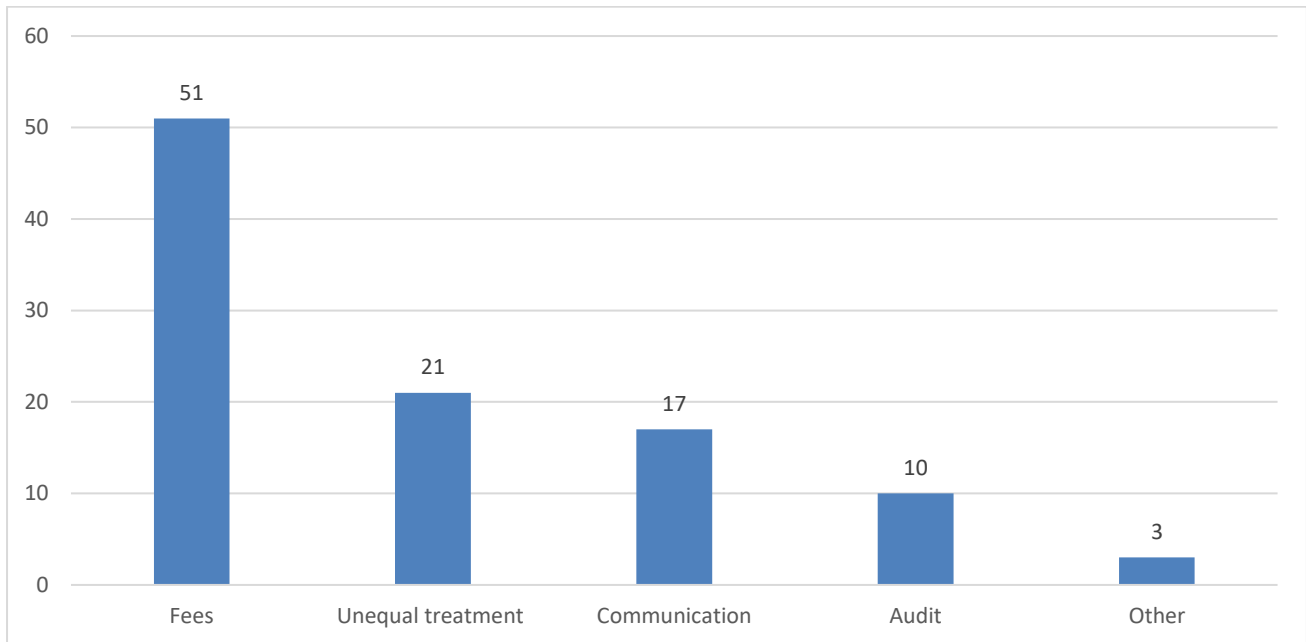
### **Commentary**

About one third (n = 95) of respondents included comments under the question ‘if you are not satisfied, what would you like the PSA to have done?’. In general, the commentary was negative although one comment noted that ‘I found the PSA to be very pro-active during the COVID crisis’. There were a number of general comments relating to a lack of help and support such as ‘I thought they could have assisted our sector more with advice and help’, ‘The PSA offered no support to the contractors’, and ‘I was not aware they could have provided help’.

The commentary focused on four main areas and these were on fees, unequal treatment of PSA licence holders compared with other business who were unlicensed but were continuing to work, communication issues, audit and ‘other’ issues (Figure 9). A small number of comments included more than one issue giving a total of 102 issues.



**Figure 9 Number of responses according to the main issues raised**



#### **Examples of commentary in respect of fees**

The following commentary was raised in respect of the fees and this commentary was closely linked with a sense that the PSA did not provide support for business:

- *The PSA licence due for renewal should be suspended and failing that at least 12 to 18 months grace provided for current members.*
- *I would have liked a moratorium on paying the licence fee when there was no work being done due to Covid.*
- *We should not have to pay the licence fee considering we were not permitted to work. Absolute disgrace.*
- *I think the licence fee is extortionate for sole traders, as is the cost of an audit. A licence should be in force for a minimum of 3 years at current pricing and because of Covid losses the licence fee should be spread over 12 months.*
- *The PSA still expected us to pay full licence fees of [amount] this year. They obviously don't have any idea of the strain this has had for the likes of small two employee businesses like ours. It's time now that they got real and woke up to what's going on around them, you can't draw blood from a stone.*
- *As an organisation they have been no help whatsoever and sent out their licence fee renewal earlier this year with no discount at all. I would have preferred if they had been of help to the industry financially and stand up for the industry. Everything about the PSA is geared towards supporting larger companies to try and put smaller companies out of business. It has never been of any support to the industry since it was formed and is just a revenue collecting organisation.*

- *I have contacted the PSA several times now requesting that they extend the current licence for the lost year of trading, but got nothing back except an email effectively saying that the "coffers" won't allow it!*
- *The PSA offered no support to the contractors. They sent emails requesting payment of the instalment licence plan during the first lockdown when we were not permitted to park and followed this up with subsequent emails again requesting prompt payment of licence fee. They offered no practical advice or support and only when this was drawn to their attention did they respond with half attempts at offering extra time to pay. We were under such pressure and they provided no support.*
- *The license fee remained the same during the period – no discount even to the point that we couldn't work to full capacity.*

### **Recommendations for change**

- *The PSA licence due for renewal should be suspended and failing that at least 12 to 18 months grace provided for current members.*
- *Could have done a lot more instead of sending pointless emails, and should have refused licence fees for 2020, and why did we have to pay them for 2021, but then again it's all about the money.*
- *Defer contractor and employee licences for any proven downturn of business timeframe and engage with leaders in event industry to plan a reboot process for the sector.*
- *While there were restrictions on the licence, the PSA could have refunded licence costs for this duration.*
- *Reduce licence fees for the small businesses or implement a scheme that can help the medium to small businesses get back on their feet.*

### **Communication**

The commentary in respect of communication drew attention to the clarity and inconsistencies, frequency and tone. Comments included:

- *No clarity. When confusion was in place, we could not contact the PSA in any way for clarity on matters.*
- *Inconsistent advise! Overly restrictive which was unfair and insisted upon needing to follow their guidelines to then roll over in the last advice and say that they are not the authority but to seek clarification from Government. Undermined every bit of advice that was given to that point.*
- *They didn't know or communicate the regulations as they changed.*
- *Very mixed communication.*
- *They didn't know or communicate the regulations as they changed.*

## Frequency and responsiveness

- *Apart from emailing me to tell me where I couldn't work there wasn't any other support.*
- *Other than an occasional email heard nothing. There were companies out there looking for guidance and other than sending on what the Government had announced already I heard nothing.*
- *I would like the PSA to answer the phone.*
- *Should have been easier to contact – phone lines were not manned at the height of the pandemic. Should have provided clearer information on the trading practices for the [name of] industry.*
- *Should have been available to answer questions and provide guidance when required, have queries answered.*

## Tone

- *Should not have been so strict and unclear in their directions and been less legally threatening in their emails – in fact try and be helpful for a change.*

## **Recommendations for change**

- *Be proactive in the area of sector specific information dissemination. Be proactive and be seen to be proactive in safeguarding legitimate licensed companies / sole traders from cowboy operators. Generate some level of value-add to the licence payers, large and small, rather than facilitate the questionable practices of the larger operators.*
- *Made the public more aware that security installations were not permitted in residential during the lockdown in February to May. I lost jobs due to some companies operating as normal.*
- *Be proactive in the area of sector specific information dissemination.*

## **Commentary in respect of lack of fairness**

Commentary relating to a lack of fairness drew attention to the requirement for PSA licence holders to stop work while others who were unregistered continued to do so without sanction. Examples of comments made included:

- *The PSA could have stopped all of the installers that continued to advertise their services on Facebook / Instagram etc, and who blatantly continued to install in new residential properties during lockdown. Many installers were stealing customers and work from compliant installers. The PSA should definitely have given a discount on the licensing fee for the time that we weren't allowed to work. Not doing so has created huge ill feeling for the PSA from installers and done enormous reputational damage.*
- *Made the public more aware that domestic installations were not permitted during the lockdown. And did more to stop alarm company's installing domestic security systems during this time. Due to me following the PSA guidelines and not carrying out domestic installations I lost customers to companies who continued to operate as normal.*

- *THE PSA has not helped legal companies. They are adding stress with lists of regulations for new employees. The new wage increase will certainly mean job losses for the industry – while illegal activity of the unregistered security companies are picking up all the work.*
- *During lockdown, unlicensed installers were working but we were not because the PSA had told us not to. This meant we couldn't work for fear of losing our licence.*

### **Recommendations**

- *Be proactive and be seen to be proactive in safeguarding legitimate licensed companies / sole traders from cowboy operators. Generate some level of value-add to the licence payers.*
- *Clamp down on unlicensed operators.*
- *Also there has been little to no action against rogue traders who have no security licence or have taken one sector licence and are trading in all different sectors.*
- *A joke of an organisation driving the business sector to the ground making a mockery of the licence holders with the unlicensed operating as normal. Extremely dissatisfied with the PSA.*
- *Stop chasing with audits and licence fees when businesses are on their knees currently and it looking more likely by the day that the Delta variant is getting out of control.*

### **Commentary in respect of audits**

Commentary in respect of audits referred to their frequency and the costs associated with them despite not being able to work. It was also highlighted that audits were carried out despite being unsuccessful in getting a contract.

#### **Audit**

- *We were put through an audit including the substantial costs associated despite not being allowed to work.*
- *They needed to instruct the auditors to stop all audits until social distancing and everything got back to normal.*

### **Recommendations**

- *Reduce frequency of audits.*
- *During this pandemic we have experienced drastic changes to our workplace, like many other companies in Ireland. We have also gone through a number of audits even though there was no change in our circumstances. To date we have been unsuccessful in securing [name of] contract but not from the lack of trying. We would like to see the timeline to secure a contract to be extended or temporarily removed during these exceptional times. This will take pressure off [name of organisation], and other businesses and organisations.*

## Summary

This report provides some understanding of the impact of COVID-19 on PSA licence holders and the findings suggest that similar to other businesses there has been a significant negative impact across a number of areas including costs, turnover, workforce and work practices.

### Key findings

Almost nine in every ten (89%) respondents indicated they were currently trading. Just under 10% had ceased trading temporarily or had restarted in the previous four weeks.

79% of respondents reported their turnover was less than normal in 2020 and 73% reported this in 2021. Almost sixty percent (58%) estimated their turnover would be lower than normal between July and December 2021.

Between 10% (2020) and 16% (2021) of respondents reported their turnover at close to normal expectations. Almost 30% (28%) estimated their turnover would be close to normal from July to December 2021.

Less than 10% indicated their business had done better than expected during the period of the pandemic and reported hiring additional temporary or permanent staff or increasing working hours.

The biggest hurdle identified related to reduced demand for services and two thirds (65%) of respondents reported this in 2020 and half (50%) reported this in 2021.

About one quarter of respondents reported experiencing cashflow problems during 2020 and 2021.

17% of respondents reported the identification of COVID-19 in the workplace resulting in service lockdown in 2020 and this was identified by 11% in 2021.

The most commonly accessed Government support was the Temporary COVID-19 Wage Subsidy Scheme. This was accessed by 49% of respondents in 2020 and 32% in 2021.

High levels of respondents indicated they were currently using hygiene measures (79%), social distancing (78%) and personal protective equipment (75%) in the workplace.

The results consistently highlight improvements for businesses in 2021 compared with 2020 and there is optimism that there will be further improvements between July and December 2021.

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# Contacts

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