EXECUTIVE INSIGHTS

Public Safety and Justice Solutions in the US

U.S. state and local governments spend more than $145 billion on technology each year, including more than $5 billion per year within public safety and justice (PS&J). This significant expenditure on PS&J technology reflects the growing recognition that technology is not just a tool but also a critical enabler of safer, more transparent and efficient public safety systems.

Growing spend on PS&J technology presents significant opportunities for public safety and justice-focused technology companies and their investors. Innovative software enables these critical organizations to protect communities while also staying interconnected. This cohesion creates a seamless response system that can address a wide range of public safety concerns. As PS&J agencies face mounting pressures to modernize, enhance efficiency and increase transparency, the demand for innovative solutions is rising. The evolving landscape presents a unique intersection of societal impact and market potential, in which strategic investments can contribute to safer, more effective public services.

PS&J agencies — including public safety answering points (PSAPs), law enforcement, fire and emergency medical services (EMS) — and courts are responsible for coordinating and managing responses to emergency and nonemergency situations to ensure public safety, provide timely and effective emergency services, maintain order and protect property (see Figure 1). These agencies must operate efficiently and cohesively to fulfill their critical roles in society.

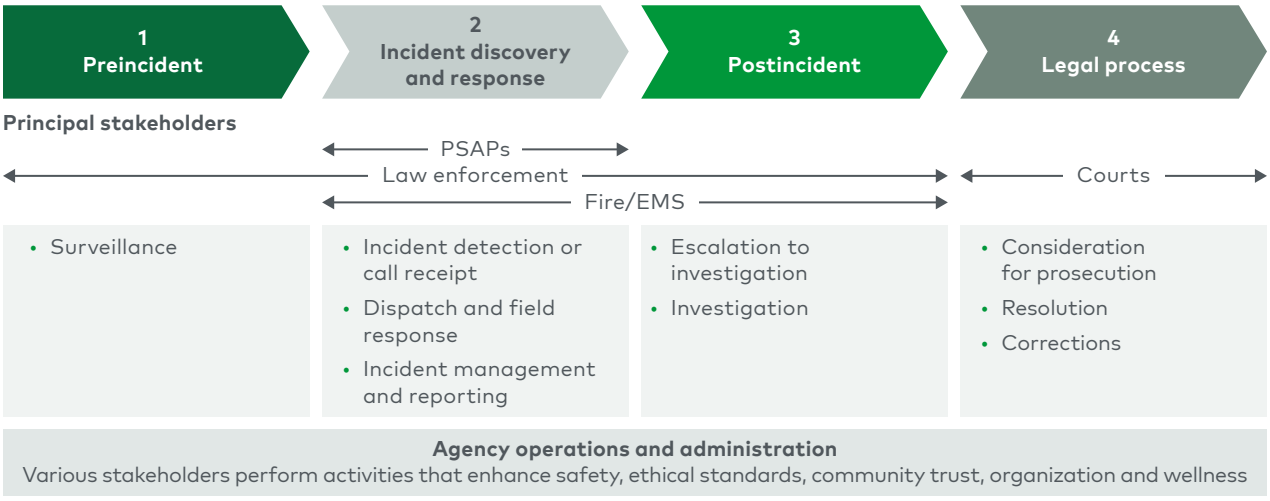
Figure 1
Types of public safety and justice agencies

PS&J entities	Description	Types of entities	Example entities
PSAPs	Receive and dispatch emergency calls at designated facilities/centers	• Primary • Secondary • Consolidated • State • Regional • Local • Specialized (e.g., school campus, airport)	OEMC Office of Emergency Management & Communications; E-Comm 9-1-1 Helping to Save Lives and Protect Property; Miami Police 911
Law enforcement	Maintain public order, prevent and investigate crimes, and enforce laws at local, regional or state level	• Police/sheriff's department • Crime labs • Forensic labs	Salt Lake City Police; Seattle Police
Fire/EMS	Mitigate incidents involving fires, medical services and response, hazardous materials incidents, and other emergencies where lives, property or environment are at risk	• State • County • Local	Daytona Beach Fire Department; Sandy Fire Department
Courts	Adjudicate legal disputes, administer justice and uphold the rule of law within a society	• Diversion • Criminal • Family • Civil • Traffic • Drug • Juvenile • Bankruptcy • Probate • Small claims	

Note: PS&J=public safety and justice; PSAPs=public safety answering points; EMS=emergency medical services
Source: L.E.K. research and analysis

Figure 2 below shows the incident response workflow, which spans four distinct stages: preincident, incident discovery and response, postincident activities and legal process. Overarching these stages are agency operations and administration functions. These elements work together to ensure PS&J entities can effectively serve their communities while maintaining the well-being of their personnel.

Figure 2
Incident response workflow



Note: PSAPs=public safety answering points; EMS=emergency medical services
Source: L.E.K. research and analysis

1. **Preincident.** Law enforcement units gather intelligence and perform risk assessments to prevent potential safety threats.

2. **Incident discovery and response.** The process begins when a call is made to emergency call handlers, who may include PSAPs or other designated emergency centers. Call handlers are responsible for quickly assessing the incident's urgency, location, nature and potential threats. They gather as much relevant information as possible to make an informed decision on resource allocation.

   PSAPs, as front-line responders, play a critical role in ensuring accurate, efficient communication with dispatchers and field units. Their prompt response and data-gathering accuracy set the tone for the entire incident response.

   Dispatchers use real-time information provided by PSAPs to mobilize emergency response units. They deliver incident specifics to law enforcement, fire/EMS or specialized units as needed, providing updates throughout the response. Dispatchers stay connected with on-scene responders, managing communications to maintain situational awareness.

   Dispatchers serve as the vital link between the incident site and responding agencies, ensuring teams arrive prepared for the specific challenges of the situation. Law enforcement and fire/EMS units rely heavily on this phase for situational context and safety updates.

3. **Postincident management and reporting.** Upon arrival, field responders assess and manage the scene, prioritizing public safety and immediate intervention. Their responsibilities include securing the area, rendering medical aid if required and initiating a thorough documentation process. Detailed reporting of actions taken, observations made and evidence collection becomes essential for further stages.

   Law enforcement manages security and investigations, while fire/EMS directly responds to emergency situations, whether medical, safety or fire related. Both groups are subject to stringent reporting requirements and must document their actions meticulously. These reports support future analysis, provide accountability and may serve as legal evidence if the incident progresses to prosecution.

   Some incidents require in-depth investigation, often involving dedicated investigative units or specialists with the tools and expertise to analyze evidence. Their tasks include interviewing witnesses, processing crime scenes and securely storing evidence for potential legal proceedings. In complex or severe cases, forensic analysis and collaboration with external experts may be necessary.

Law enforcement investigators lead the collection and preservation of evidence, ensuring it meets judicial standards. Their work is crucial for prosecutable cases, and any missteps in documentation or handling can impact the entire case outcome.

4. **Legal process.** When an incident has legal implications, the gathered evidence and reports are escalated to courts for review. Legal teams assess the incident to determine prosecutorial viability. If a case moves forward, law enforcement and legal professionals collaborate to present evidence, interview witnesses and support the judicial process.

   Courts evaluate all documented evidence, escalating cases that meet prosecution thresholds. Law enforcement collaborates closely with legal representatives to build strong cases, ensuring justice and accountability.

   Cases that proceed to resolution may involve sentencing in court, ranging from imprisonment to probation or diversion programs (such as rehabilitation efforts). Corrections teams oversee compliance with judicial orders, and PS&J agencies continue to monitor outcomes to ensure both justice and public safety.

Agency operations and administration

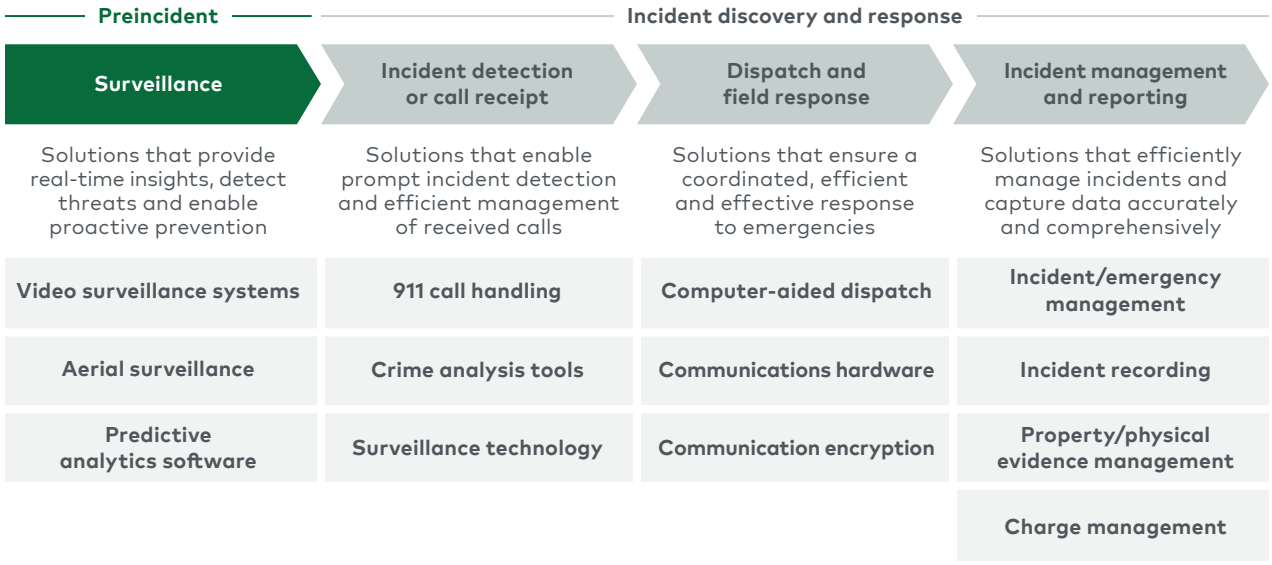
Agency operations and administrative teams provide oversight, establishing safety protocols, ethical guidelines and community engagement strategies. Their role spans all workflow phases, ensuring consistency, accountability and responsiveness. They manage personnel wellness, allocate resources and uphold standards that impact both incident handling and public perception.

This backbone function supports all operational teams, ensuring personnel are equipped, motivated and aligned with the agency's mission. By fostering community trust, ethical conduct and interagency cooperation, administration strengthens each step of the incident response workflow.

Technology solutions

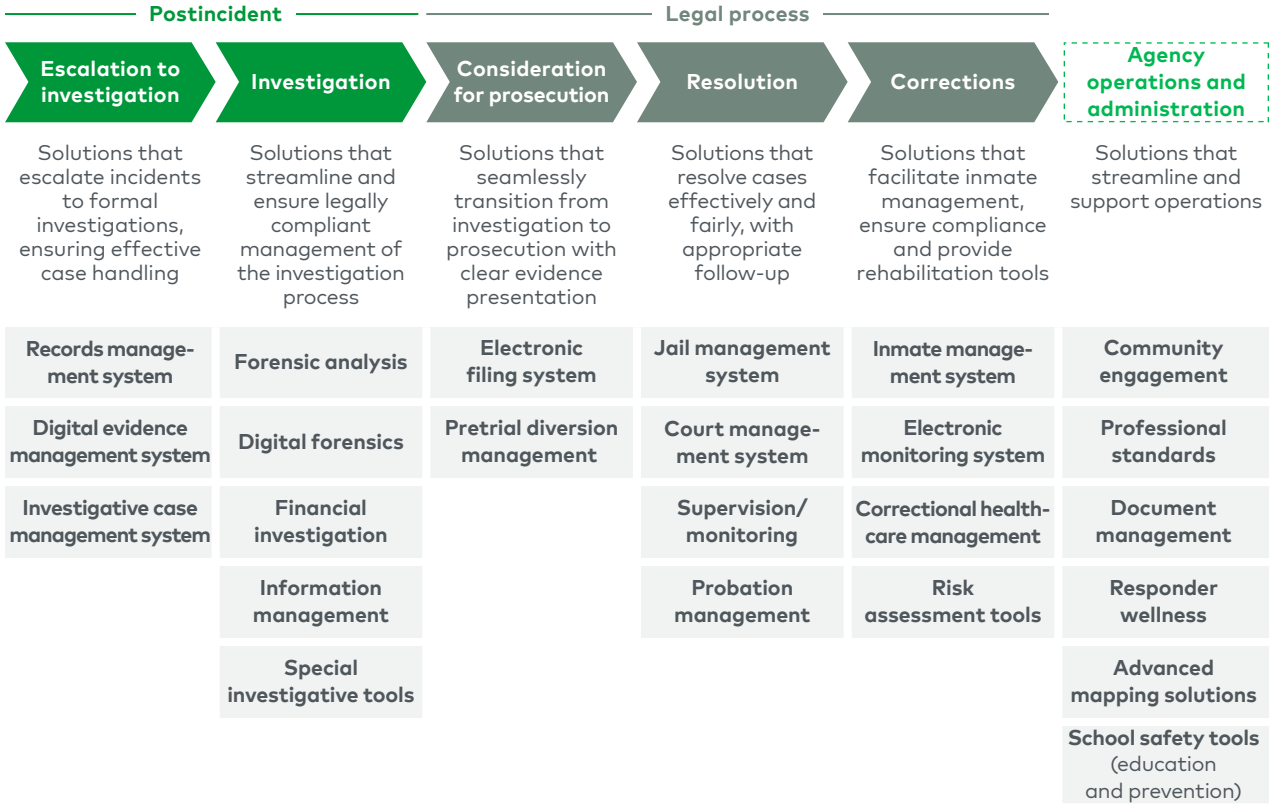
PS&J entities rely on a range of third-party technology solutions to address agency operations (see Figures 3a and 3b). These technologies support PS&J entities throughout the incident response workflow and operations and administration. Various software and hardware solutions support entities in identifying and managing incidents within the incident response workflow and in carrying out agency operations and administrative tasks.

Figure 3a
Technology solutions



Source: L.E.K. research and analysis

Figure 3b
Technology solutions



Source: L.E.K. research and analysis

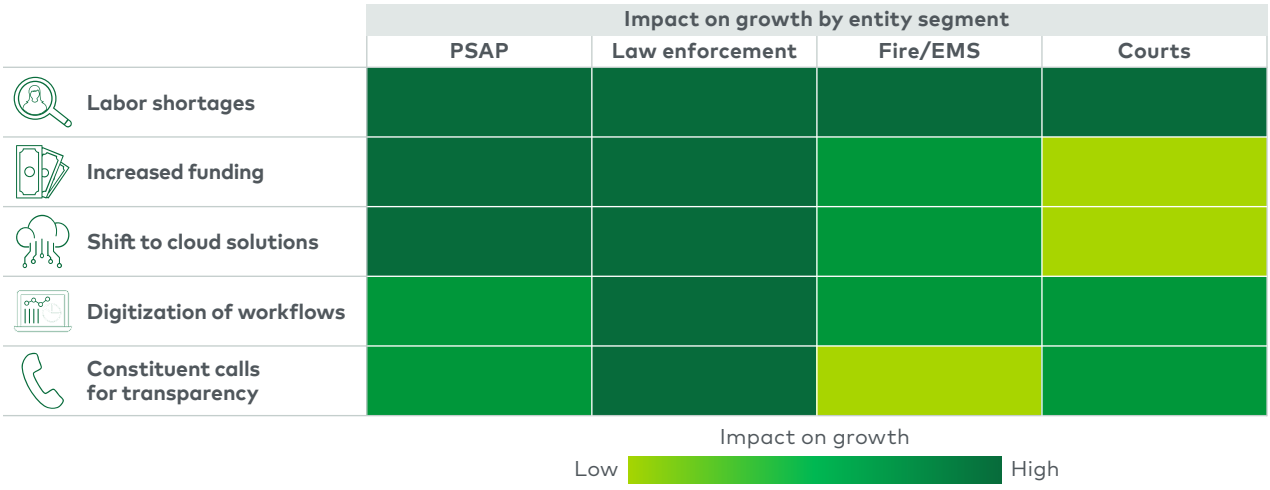
Various trends are impacting the public safety and justice technology market:

- Labor shortages in public safety roles are pushing agencies to adopt efficiency-enhancing technologies
- Increased funding, stemming from rising tax revenues and government support, is enabling greater investment in these solutions
- A shift from legacy systems to cloud-based alternatives is changing spending patterns, often increasing recurring costs but improving capabilities
- Digitization of workflows, fueled by generational change and new technologies like artificial intelligence (AI), is driving adoption of advanced solutions
- Growing public demand for transparency, especially in law enforcement, is spurring investment in technologies that enhance record-keeping and community engagement

These interconnected trends are reshaping the landscape of public safety and justice operations, with technology playing an increasingly central role.

Market trends such as labor shortages, increased funding, the shift to cloud solutions, workflow digitization and calls for transparency provide a runway for growth. Moreover, these trends are reshaping the landscape, with technology playing an increasingly central role in PS&J operations (see Figure 4). As such, PS&J agencies are seeking comprehensive, end-to-end solutions that enhance operational efficiency and interoperability. This consolidation of solutions trend is creating lucrative opportunities for forward-thinking investors and technology providers. As larger jurisdictions are adopting integrated platforms, smaller entities are following suit, thus amplifying market potential.

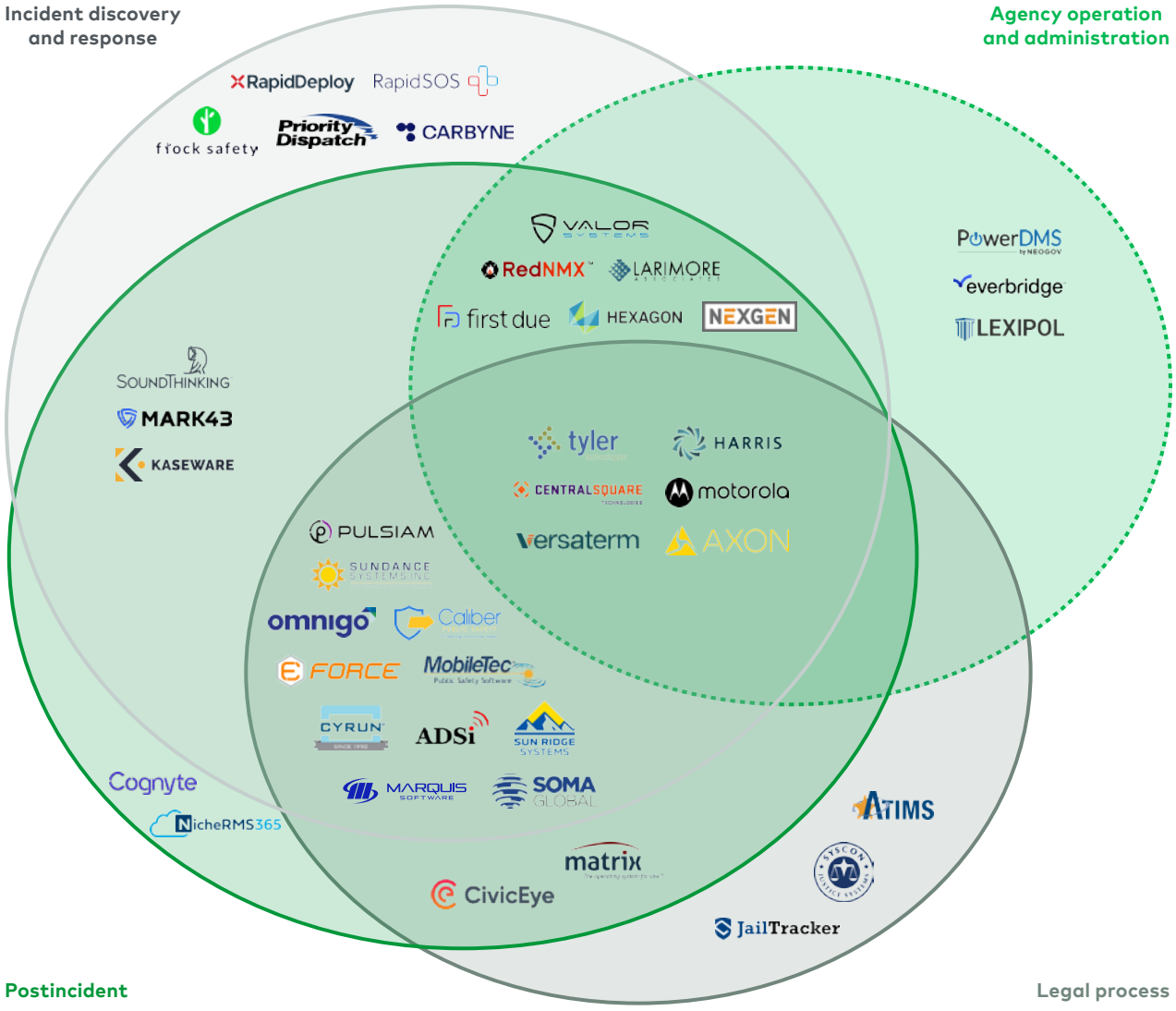
Figure 4
Market trends



Note: PSAP=public safety answering point; EMS=emergency medical services
Source: L.E.K. research and analysis

In response to this demand, vendors are developing end-to-end platforms that offer comprehensive solutions across the incident response workflow. Currently, PS&J technology providers offer a range of solutions that address different stages of the incident response workflow with varying strengths of integration (both user interface and application programming interface integration (see Figure 5)).

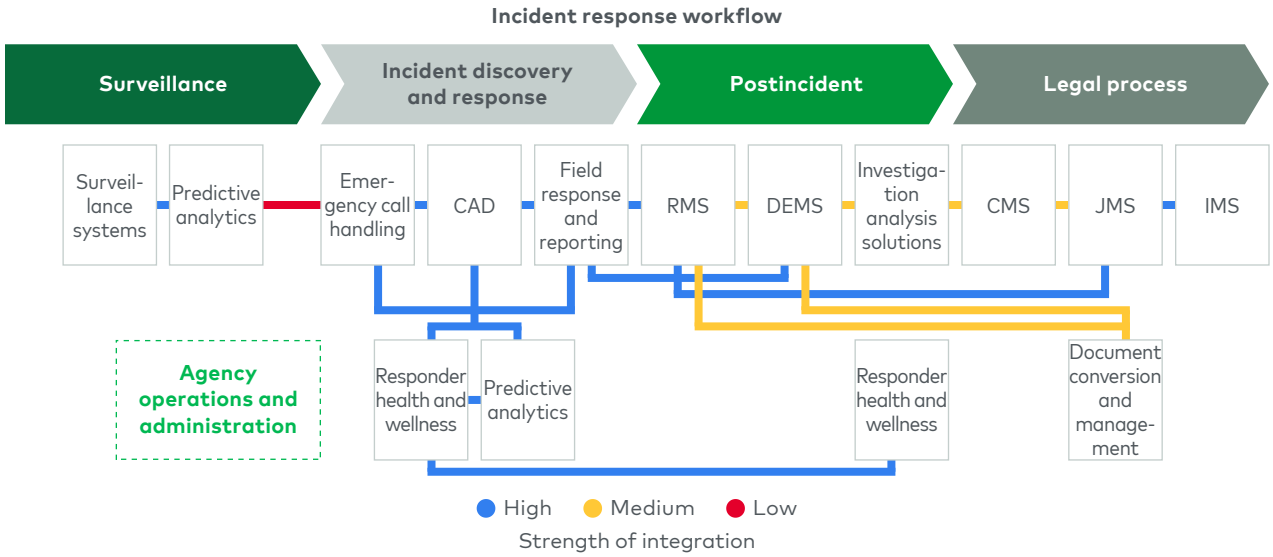
Figure 5
Example technology vendors supporting the range of the incident response workflow



Source: L.E.K. research and analysis

Many vendors are making significant efforts to reach this goal, recognizing that the first to succeed will gain a competitive advantage. This trend reflects a strong market push toward providing comprehensive interoperable systems, with the race to create a complete, all-in-one solution intensifying among technology providers in the PS&J sector (see Figure 6).

Figure 6
Integration of PS&J solutions across the incident response workflow



Note: PS&J=public safety and justice; CAD=computer-aided dispatch; RMS=records management system; DEMS=digital evidence management system; CMS=court management system; JMS=jail management system; IMS=inmate management system
Source: L.E.K. research and analysis

As the PS&J technology landscape evolves, key questions arise for investors and technology companies alike. Market alignment remains critical: Are current offerings keeping pace with the trend toward integrated, end-to-end solutions that cover the entire incident response workflow? Identifying gaps in product lines and opportunities for strategic acquisitions, partnerships or internal development can provide a competitive edge. Companies must also distinguish between emerging solution categories ripe for innovation — such as AI-driven predictive analytics and advanced data integration across workflow stages — and mature segments such as computer-aided dispatch and records management systems, where innovation is less likely. Moreover, scalability and interoperability are vital; solutions must serve large and small agencies and jurisdictions alike and integrate seamlessly with existing systems.

Ultimately, as technology reshapes PS&J operations, companies that address these challenges effectively will be best positioned for growth. For investors, understanding these dynamics is crucial to spotting the most promising opportunities in this rapidly evolving market. The demand for integrated, scalable solutions will only grow stronger, and those who anticipate and adapt to these shifts will define the market.

For more information, please contact us.

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