



Public Safety LTE

A Global Assessment of Market Size, Technology, Vendor Trends and Spectrum Allocation 2012 - 2016

March 2012

Overview:

Considered as the de-facto standard for Public Safety broadband communications, LTE is rapidly gaining momentum within the Public Safety industry. As a result, Public Safety agencies, vendors and service provider are heavily investing in Public Safety LTE, with over eleven commercial contracts awards (as of March 2012), and several prominent international trials.

While initial investments appear promising, there still remain a number of key issues that need to be addressed such as frequency spectrum allocation, funding for global Public Safety LTE deployments, QoS prioritization of Public Safety LTE users in commercial networks, and interoperability with legacy Land Mobile Radio (LMR) systems such as APCO 25 and TETRA.

This report provides an in-depth of the global Public Safety LTE industry to address the aforementioned issues, in addition to providing a detail assessment of the technology, market size, and key trends within the Public Safety LTE industry.

Key Findings:

- Over the next five years, the Public Safety LTE will grow at a CAGR of 90 % accounting for over \$ 6 Billion in revenue by 2016, up from \$ 240 Million in 2011.
- Operator service revenues will constitute a vast majority of the revenue, followed by managed services and integration, representing a lucrative opportunity for vendors and system integrators to build, own and operate Public Safety LTE networks.
- Europe will lag behind Middle East, Asia Pacific and Latin America in the early adoption of Public Safety LTE technology due to stringent spectrum regulation policies. A number of Public Safety LTE trials are already underway in these regions

Target Audience:

- Public Safety Agencies
- Cellular Network Operators
- Public Safety Network Operators
- System Integrators
- Cellular Network Infrastructure Manufacturers
- LMR Infrastructure Manufacturers
- LMR Radio Manufacturers
- Smartphone Manufacturers
- Mobile Computing Equipment Manufacturers
- Public Safety Application Developers

Report Benefits

- **Global Spectrum Allocation for Public Safety LTE:** A global assessment of spectrum allocation and funding for Public Safety LTE deployments, based on input from regional regulatory authorities.
- **Global Public Safety LTE Market Size, Contracts & Trials:** A global review of the worldwide Public Safety LTE market including assessment of revenue share by market segment (infrastructure sales, services, user device sales, etc), and a review of global contracts and trial engagements.
- **RAN Sharing and Roaming:** The term "RAN sharing" refers to sharing of actual eNodeBs. As part of this arrangement, each operator accesses the shared RAN with its own EPC. Vendors are also considering the implementation of Inter-PLMN hand-over (as opposed to roaming) and then for LTE Commercial carriers to deploy Policies for Service Level Agreements that include Priority Access (Access Class Barring, Preemption and ARP) and QoS/ QCI assignment for default and dedicated bearers. The report assesses in detail how many of vendors and commercial carriers will support RAN sharing, roaming and inter-PLMN handovers which will be key factors towards the adoption of commercial LTE RANs for Public Safety applications.
- **Global QoS Requirements for Public Safety LTE Communications:** A detailed assessment of global requirements for Priority access and High QoS for Public Safety subscribers, for shared commercial LTE networks, while they roam on to Commercial Networks.
- **Public Safety LTE Devices and End User Applications:** An assessment of device usability characteristics, Multi-Radio LTE/ LMR interoperability technology, Software and Applications (VoLTE, PTT over LTE, IMS, IP).
- **Vendor Trends and Roadmaps:** A detailed assessment of solution portfolios and roadmaps for major infrastructure/ device vendors and system integrators
- **LTE-Advanced Support for Heterogeneous Commercial/LMR Networks:** In-depth assessment of the LTE Advanced standard and technologies and spectrum planning for Fixed/Nomadic based Pico Cells/Femto Cells and mobile base stations (e.g. LTE Cell on Wheels (CoW)) and proximity based services such as Direct Mode Operation (DMO) in LMR systems, which have broad implications for the adoption of Public Safety LTE services.
- **LTE based Public Safety Tactical Systems and Military Applications:** Detailed market assessment of LTE based Public Safety Tactical Systems such as CoW, Cell over Light Trucks (COLTs) and Military Applications for LTE.

Companies in Report

- | | | | |
|--------------------|----------------------|-----------------------------------|-----------------------------------|
| • 3GPP | • FCC | • Motorola Solutions | • Tecore |
| • Abu Dhabi Police | • Harris Corporation | • Nokia Siemens Networks | • TeleCommunication Systems (TCS) |
| • Alcatel Lucent | • Hong Kong Police | • Oceus Networks | • Thales |
| • APCO | • HTC | • Qatar Armed Forces | • US Army |
| • AT&T | • Huawei | • Qualcomm | • US Department of Defense |
| • BayWEB | • Intrado | • Raytheon | • Verizon Wireless |
| • Brazilian Army | • IP Wireless | • Samsung | |
| • Cassidian | • KPN | • Sao Paulo Military Police Force | |
| • Ericsson | • LA-RICS | • Tait | |
| • ETSI | • Motorola Mobility | | |

Table of Contents

List of Tables	4	5.2	Regional Segmentation for Public Safety LTE Deployments	53
List of Figures	5	5.2.1	North America	53
1	Chapter 1: Introduction	6	5.2.2	Western Europe 54
1.1	Executive Summary	6	5.2.3	Eastern Europe 55
1.2	Topics Covered	7	5.2.4	Middle East & Africa 56
1.3	Key Findings	9	5.2.5	Asia Pacific 57
1.4	Target Audience	10	5.2.6	Latin & Central America 58
1.5	Companies Mentioned	11	6	Chapter 6: Public Safety LTE Subscriptions and Market Size 2012 - 2016 60
2	Chapter 2: Present Overview of the Public Safety LTE Market	13	6.1	Global Public Safety LTE Revenue and Market Share Forecasts 60
2.1	The Business Case for Public Safety LTE	15	6.1.1	Global LTE Industry Revenues 60
2.2	Commercial Availability of Public Safety LTE Devices	20	6.1.2	Market Share by Industry Segment 62
2.3	Public Safety LTE Deployments throughout the Globe	21	6.1.3	Market Share by Region 64
2.4	Public Safety LTE Market Size and Revenue Opportunities	23	6.1.4	Market Share by Vendor / Integrator / Service Provider 68
2.4.1	Regional Segmentation and Market Share	24	6.1.5	Global LTE Subscriptions 70
2.4.2	Market Segmentation: Commercial vs Private Networks	25	6.2	Regional Public Safety LTE Revenue and Market Share Forecasts 73
2.4.3	Infrastructure Vendor Market Share & Revenue	29	6.2.1	North America 74
2.4.4	Device Vendor Market Share & Revenue	31	6.2.2	Western Europe 76
3	Chapter 3: Public Safety LTE Technology	33	6.2.3	Eastern Europe 78
3.1	LTE RAN Technology (E-UTRAN)	33	6.2.4	Middle East & Africa 80
3.2	EPC Technology	35	6.2.5	Asia Pacific 82
3.3	Public Safety Specific Entities for LTE Networks	37	6.2.6	Latin & Central America 84
3.4	QoS for Public Safety LTE Systems: Global Requirements and Solutions	38		
3.5	Interoperability between Commercial and Private LTE Networks	39		
3.6	Interoperability with APCO 25 and TETRA Systems	40		
3.7	LTE Advanced Support for Heterogeneous Commercial and LMR Networks	41		
3.8	Tactical Deployment Solutions for Public Safety LTE	42		
3.9	Integration with Military Communication Systems	43		
4	Chapter 4: Public Safety LTE Solutions, Devices and Applications	45		
4.1	Public Safety LTE Devices & Vendor Roadmaps	45		
4.2	Public Safety LTE Infrastructure Solutions & Vendor Roadmaps	48		
4.3	Public Safety LTE Applications	49		
5	Chapter 5: Spectrum Regulation and Funding Implications for Public Safety LTE	51		
5.1	Global Spectrum Allocation for LTE Deployments	51		

List of Tables

Table 1: Public Safety LTE Infrastructure Vendor Ranking Matrix 2011 - 2016	30
Table 2: Public Safety LTE Device Vendor Ranking Matrix 2011 - 2016	32
Table 3: Public Safety LTE Vendor / System Integrator Ranking Matrix 2011 - 2016	69

List of Figures

Figure 1: Public Safety LTE Market Size 2011 – 2016 (USD Millions)	23
Figure 2: Public Safety LTE Market Size by Region 2011 – 2016 (USD Millions)	25
Figure 3: Public Safety LTE Infrastructure Shipment Revenues 2011 - 2016:	29
Figure 4: Public Safety LTE Device Shipment Revenues 2011 - 2016:	31
Figure 5: LTE RAN Architecture	34
Figure 6: LTE EPC Architecture	36
Figure 7: Public Safety LTE Devices	46
Figure 8: Public Safety LTE Device Vendor Roadmap	47
Figure 9: Public Safety LTE Infrastructure Vendor Roadmap	48
Figure 10: Public Safety LTE Industry Revenues 2011 – 2016 (USD Millions)	61
Figure 11: Public Safety LTE Revenue by Service/Vendor Segment 2011 – 2016 Excluding Operator Service Revenue (USD Millions)	62
Figure 12: Public Safety LTE Operator Service Revenues 2012 – 2016 (USD Millions)	63
Figure 13: Public Safety LTE Regional Market Share 2011	64
Figure 14: Public Safety LTE Regional Market Share 2012	65
Figure 15: Public Safety LTE Regional Market Share 2013	66
Figure 16: Public Safety LTE Regional Market Share 2014	66
Figure 17: Public Safety LTE Regional Market Share 2015	67
Figure 18: Public Safety LTE Regional Market Share 2016	68
Figure 19: Public Safety LTE Vendor / System Integrator Market Share Projection 2011 - 2016	70
Figure 20: Commercial & Private Public Safety LTE Subscriptions 2011 - 2016	71
Figure 21: Traditional (Conventional & Trunked) LMR Subscriptions 2011 - 2016	72
Figure 22: Commercial & Private Public Safety LTE Subscriptions by Region 2011 - 2016	73
Figure 23: North America Commercial & Private Public Safety LTE Subscriptions 2011 - 2016	74
Figure 24: North America Commercial & Private Public Safety LTE Subscriptions & Market Share by Country 2011 - 2016	75
Figure 25: Western Europe Commercial & Private Public Safety LTE Subscriptions 2011 - 2016	76
Figure 26: Western Europe Commercial & Private Public Safety LTE Subscriptions & Market Share by Country 2011 - 2016	77
Figure 27: Eastern Europe Commercial & Private Public Safety LTE Subscriptions 2011 - 2016	78
Figure 28: Eastern Europe Commercial & Private Public Safety LTE Subscriptions & Market Share by Country 2011 - 2016	79
Figure 29: Middle East & Africa Commercial & Private Public Safety LTE Subscriptions 2011 - 2016	80
Figure 30: Middle East & Africa Commercial & Private Public Safety LTE Subscriptions & Market Share by Country 2011 - 2016	81
Figure 31: Asia Pacific Commercial & Private Public Safety LTE Subscriptions 2011 - 2016	82
Figure 32: Asia Pacific Commercial & Private Public Safety LTE Subscriptions & Market Share by Country 2011 - 2016	83
Figure 33: Latin & Central America Commercial & Private Public Safety LTE Subscriptions 2011 - 2016	84
Figure 34: Latin & Central America Commercial & Private Public Safety LTE Subscriptions & Market Share by Country 2011 - 2016	85

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