EMEA Mission Critical Wireless Communications - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The EMEA Mission Critical Wireless Communications Market size is estimated at USD 8.01 billion in 2024, and is expected to reach USD 12.39 billion by 2029, growing at a CAGR of 9.12% during the forecast period (2024-2029).

The capabilities of mission-critical wireless communications in the EMEA region are anticipated to be enhanced by ongoing technological advancements in communication systems, such as the integration of 5G technology, the Internet of Things (IoT), and Artificial Intelligence (AI). Moreover, mission-critical networks are expected to significantly benefit from 5G's advancements over Push-to-Talk by integrating features like Push-to-Video, video streaming, group messaging, file sharing, and location sharing.

Key Highlights
-The growing focus on public safety and security is a key factor responsible for the market's growth. The increasing emphasis on ensuring the safety of the public and the need for effective emergency response systems has increased the demand for advanced communication technologies across various sectors within the EMEA region. This includes the deployment of reliable and secure communication networks for critical operations in the public safety, defense, transportation, and utility sectors, addressing the imperative need for swift and coordinated responses during emergencies and critical situations.
-Additionally, the EMEA mission-critical wireless communications market is witnessing a surge in the deployment of cloud-based communication solutions. The adoption of cloud-based platforms enables organizations to achieve scalability, flexibility, and cost-effectiveness in managing and accessing critical communication data, enhancing operational efficiency and situational awareness within the region.
-Europe, comprising a diverse range of countries with advanced industrial and technological capabilities, is expected to be a significant adaptor of mission-critical wireless communications solutions. With a strong emphasis on technological innovation, regulatory compliance, and public safety initiatives, the European region serves as a primary driver for the growth and evolution

of the EMEA mission-critical wireless communications market. Moreover, the presence of established industries, extensive transportation networks, and a strong focus on enhancing communication infrastructure further solidifies Europe's significant contribution to the overall market share within the EMEA region.
-The deployment and maintenance of wireless critical communication infrastructure and equipment involve substantial costs inherent to such systems' complexity, reliability, and security requirements. These costs are significant for organizations and agencies that rely on mission-critical wireless communication, such as public safety, defense, transportation, and industrial sectors. The initial cost of purchasing hardware, such as base stations, antennas, radios, and network components, is a substantial part of the deployment expenses. Moreover, a high maintenance cost has been associated with critical wireless communication infrastructure and equipment. This is expected to restrain the growth of the market.
-The COVID-19 pandemic significantly impacted the EMEA critical mission wireless communications market, presenting immediate challenges and long-term implications for industry stakeholders. The distinctive health crisis began a series of constraints rolling across the market, affecting key segments and stakeholders in various ways. The implementation of stringent lockdown measures, supply chain disruptions, and workforce limitations posed significant challenges to the timely deployment, maintenance, and upgrade of critical communication infrastructure across the EMEA region.
-The EMEA critical mission wireless communications market gradually witnessed signs of recovery as the region emerged from the unprecedented disruptions caused by the COVID-19 pandemic. The market remained slightly positive due to the gradual relaxation of restrictions, the adoption of strict health and safety protocols, and the rapid pace of vaccination campaigns.

EMEA Mission Critical Wireless Communications Market Trends

Oil and Gas Industry to Hold Major Share in the Commercial and Industry End User Segment

- The oil and gas industry in the EMEA region heavily relies on mission-critical wireless communications to ensure seamless operations, enhanced safety measures, and efficient production processes. Across Europe, the Middle East, and Africa, this vital sector leverages various communication technologies tailored to the specific demands of oil and gas operations, including both onshore and offshore facilities. As a result, these communication systems play a crucial role in facilitating reliable and uninterrupted communication between personnel, equipment, and control centers, thereby enhancing operational efficiency, safety protocols, and emergency response capabilities in the oil and gas sector.
- The industry's complex operations necessitate robust and reliable communication systems to ensure the safety and security of personnel, assets, and the environment. Mission-critical wireless communications enable real-time monitoring, emergency response, and efficient coordination, enhancing overall safety and security measures. By providing seamless and uninterrupted communication channels, these systems might help mitigate potential risks and ensure quick responses to critical incidents during exploration, production, or distribution processes.
- Moreover, according to the Energy Institute, the Middle East produces more substantial volumes of oil than any other region. For instance, in 2022, around 32.8% of the world's oil production was from this region. In addition, Europe and CIS position third in the global regions, accounting for 18.2% of the global oil production share. In addition, the Africa region accounts for around 7.5% share. As a result, the region's prominent position as a significant oil-producing hub emphasizes the critical importance of robust communication infrastructure in the oil and gas sector. With a substantial share of the world's oil production originating from the Middle East, the need for efficient and reliable mission-critical wireless communications becomes increasingly crucial.
- In the Middle East, the oil and gas industry leverages advanced satellite communication networks, digital radio systems, and Internet of Things (IoT) technologies to support its expansive operations. These networks are designed to withstand the region's challenging environmental conditions, enabling continuous and reliable communication across remote and offshore oil production facilities.
- Across EMEA, the oil and gas sector is expected to witness a combination of satellite-based communication systems, digital two-way radio networks, and integrated IoT solutions to support its diverse operational requirements. These systems might be

tailored to address various challenges of the continent's diverse geographical landscapes, enabling seamless communication and data transmission across various onshore and offshore oil exploration and production sites. The region has witnessed a growing focus on planned investments in mission-critical wireless communication infrastructure to promote operational resilience, ensure workforce safety, and optimize production efficiency within the oil and gas industry.

Europe is Expected to Hold Significant Market Share

- The rising adoption of digital transformation initiatives across various industries, including manufacturing, logistics, and healthcare, has led to an increased demand for mission-critical wireless communications solutions. The integration of advanced communication networks, such as TETRA, LTE, and 5G, enables seamless connectivity and real-time data transmission, thereby facilitating improved operational efficiency and situational awareness.
- In addition, according to a GSMA 2022 report, the 5G connections in Europe were recorded to be around 4% of total connections, while it is estimated that this share will reach 44% in 2025. As the region progressively transitions toward widespread 5G connectivity, the potential for enhanced communication capabilities in challenging environments becomes increasingly feasible.
- In January 2023, the UK government announced a new wireless infrastructure strategy to invest in and provide 5G connectivity to every populated area by 2030. As part of the strategy, the United Kingdom will be at the forefront of the next generation of wireless technology owing to a comprehensive 6G plan. The government established a national mission to secure the United Kingdom's place in future telecoms and 6G technologies, with up to EUR 100 million (USD 130 million) in initial funding. Such initiatives could contribute to the growth and development of the critical wireless communications market in the United Kingdom.
- The market is significantly driven by the investments in wireless technologies and support from the government funding position the United Kingdom's position as a key player in the critical wireless communications market, reflecting the country's commitment to leveraging advanced wireless technologies to enhance operational efficiency, resilience, and safety within critical infrastructure sectors.
- France has witnessed substantial investments in research and development, introducing innovative wireless communication solutions that offer enhanced security, reliability, and scalability. France's commercial and industrial sectors are increasingly integrating mission-critical wireless communication solutions to enhance their operational efficiency and ensure seamless connectivity across various sectors, such as transportation and logistics, manufacturing, and energy.
- Germany's strong focus on industrial digitalization and implementation of Industry 4.0 principles have driven the adoption of mission-critical wireless communication technologies. Industries such as manufacturing, automotive, and logistics increasingly rely on efficient and secure communication systems to optimize operations, monitor supply chains, and enhance overall productivity, thus driving the demand for advanced wireless communication solutions. The country's significant emphasis on defense and aerospace industries has also contributed to the growth of the mission-critical wireless communications market.

EMEA Mission Critical Wireless Communications Industry Overview

The EMEA Mission Critical Wireless Communications Market is fragmented with the presence of major players like Cobham Satcom, Inmarsat Global Limited, Eutelsat Communications SA, Telefonaktiebolaget Lm Ericson, and Saudi Telecom Company (STC). Players in the market are adopting strategies such as partnerships and acquisitions to enhance their product offerings and gain sustainable competitive advantage.

- June 2023: Vodafone Group Plc and CK Hutchison Group Telecom Holdings Limited, a wholly-owned subsidiary of CK Hutchison Holdings Limited ("CK Hutchison"), entered into binding agreements to a combination of their UK telecommunication businesses, respectively Vodafone UK and Three UK. Vodafone will own 51% of the combined business ("MergeCo") and CKHGT 49%.

- May 2023: Nokia announced new, optimized Core Network software solutions for field area network and wide area network needs of power utilities and public safety, expanding the portfolio range available to large, mission-critical enterprises and governments and reflecting the company's focus on driving continued leadership in private wireless. Nokia Core Enterprise Solutions are based on its widely deployed Core products and optimized to help organizations take advantage of secure carrier-grade capabilities and digitalize their network infrastructure to realize increased productivity, automation, and efficiency.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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