

Private Mobile Networks

Highlights from 1Q24

The GSA logo is located in the bottom right corner of the page. It consists of the letters "GSA" in a white, bold, sans-serif font. To the right of the letters are three curved lines of increasing length, suggesting a signal or network. The logo is set against a black rectangular background.

GSA

Demand for private mobile networks based on 4G LTE, and increasingly 5G technologies, is being driven by the spiralling data, security, digitisation and mobility requirements of modern enterprise and government entities. Organisations of all types are combining connected systems with big data and analytics to transform operations, increase automation and efficiency or deliver new services. Wireless networking with LTE or 5G enables these transformations even in the most dynamic, remote or highly secure environments while offering the scale benefits of a technology that has already been deployed worldwide.

The arrival of LTE-Advanced systems delivered a step change in network capacity, throughput and deterministic latency. 5G networks will bring increased densities of users and devices, even greater capacity and further improvements to latency that enable the use of mobile technology for time-critical applications.

Private mobile networks are often part of a broader digital transformation programme including cloud, artificial intelligence, machine learning and data analytics. More and more applications of private mobile networks will use these capabilities.

Key Messages in 1Q24

To 1Q24, GSA has categorised 1,427 customers deploying at least one private mobile network. We count customer references as unique organisations or government entities deploying 3GPP-based 4G LTE or 5G networks that are worth more than €100,000. As of June 2024, we now also count customer references that are between €50,000 and €100,000 — some of these may include trials.

On average, 70% of references in our database are non-public and unique to the database. This number can be higher for certain industries, with more than 80% of sectors such as military and defence, maritime and power plants not visible in the public domain.

In addition to the 1,427 customers deploying private mobile networks, 52 references are worth between €50,000 and €100,000. Net additions worth over €100,000 in the quarter reached 43, up from 1,384 in 4Q23. Although the number of new customer references is lower than reported in previous quarters, this does not consider increases in the number of sites or new revenue opportunities from existing customers.

Figure 1 shows customer announcements grew at a compound annual growth rate of 93% from 2017 to 1Q24.

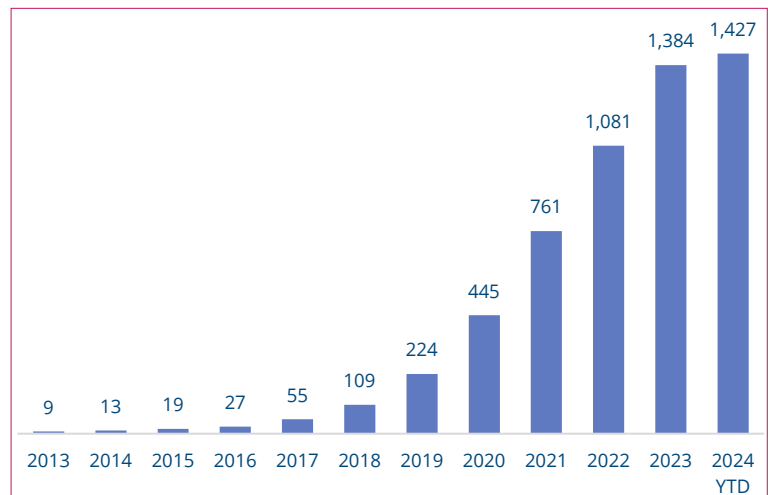
There are 78 countries around the world with at least one private mobile network, with Papua New Guinea adding its first network in 1Q24. Private mobile networks are mainly in the developed world so far, with the United States, Germany, the United Kingdom, China and Japan having the most references. Of the top 10 reporting countries, Belgium and the Netherlands saw growth of over 10% from 4Q23, up 14% and 11% respectively.

Public venues and other neutral hosts saw the highest growth of the top 15 sectors from 4Q23, up 16%. Hospitals grew by over 10%. Manufacturing, education and mining remain the top three sectors for customer references, although this does not represent the actual size and scale of deployments, which vary by user type.

Use of LTE and 5G is variable by sector. Some industries, like hospitals, favour 5G, whereas LTE is more dominant in sectors such as oil and gas and mining.

To learn more about the status of the market, visit gsacom.com for the full version of this report and for access to the accompanying database.

Figure 1. Private mobile network customer references of over €100,000



ABOUT GSA

GSA is the voice of the global mobile ecosystem and has been representing mobile suppliers since 1998.

GSA Research

Mobile industry research is the backbone of GSA activity and covers topics from devices, chipsets and technology, to networks, features and spectrum.

The GSA research team is constantly following market dynamics and activity to ensure the latest data is available to GSA users via the GSA website.

Data is updated monthly and quarterly and can be referenced by users who register for free on the GSA website.

GSA GAMBoD Database

GSA reports are based on extensive data contained in the GSA GAMBoD databases, which is a resource available to GSA members and associates. Companies and policy makers can subscribe, as a GSA associate, to gain access to GSA databases and member reports for additional insights into the source data behind reports, which can be used for their own research purposes.

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Please email info@gsacom.com for more information.



P.O. Box 6092
Sheffield
S6 9HF
UK

info@gsacom.com

<https://gsacom.com>

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