



COVID-19 – Challenges and Opportunities for the Critical Communications Industry

Webinar 16 September 2020

View the webinar recording [here](#).

This document sets out the questions and answers from the webinar.

Q. Which ‘new’ LTE deployments are you referring to in the presentation?

The presentation refers to new LTE devices being deployed during the course of / directly related to COVID-19, not networks. Additional LTE devices are being added on to existing networks, in the context of existing stocks of LMR/PMR handsets been depleted due to additional resources needed during the pandemic.

Q. If critical control room revenues are down 3.6%, where are the 30-35% reductions in LMR/PMR revenues coming from?

To explain a little bit around how we structure the research and how we measure the market, the LMR/PMR piece comes from our mobile radio research, covering TETRA, DMR and P25 devices, so the reduction in revenue is coming from fewer devices being sold, whereas the graph in the slide for command and control rooms covers areas like CAD software, GIS, recording software, call taking software and records management so it’s a different market sector that’s being counted there, so the 3.6% is about projects that are being pushed out and delayed.

Q. Do you think the pandemic will prevent people from moving to critical broadband, in that they will want to stay with their trusted narrowband services?

I will caveat my answer by saying my focus is on the command and control room side, however I’m inclined to say no to that. Everything I am hearing from colleagues is that pandemic has shown emergency services how vital those additional data services are that can be delivered over LTE. There may be some slowdown in moving away from traditional devices but I expect that would only be as those emergency services organisations have to cope with reallocation of staffing requirements or short-term budgetary issues.

Q. Do you foresee any mergers/acquisitions in the sector as a result of the pandemic?

There are no names that I would immediately consider, but that said my initial instinct answer is yes, definitely – purely because as we enter into the recession it will naturally open opportunities for stronger, more successful companies to acquire those who have not been so successful. As we move through economic cycles, M&A activity may be kicked off by the downturn and I do expect that to be a factor in the medium term.

Q. There is good and bad press about the actual ‘intelligence’ of AI – do you think it has a future as an integrated part of critical communications services?

I personally am still making my mind up. I have seen interesting use cases of AI assistants where the AI will assist dispatchers in alerting or bring their attention to relevant information at the right time. However there is the question as to whether or not that will be too much information or adds to the information overload, but I have yet to see a better use case than that. So for me the jury is still out. There are very interesting applications of AI in other areas, for example for transcribing interviews or statements, which can obviously save a huge amount of time for police officers and administrative staff.

Q. Has the coronavirus created opportunities for cybercriminals in the critical comms world?

This is not a question I have any expertise on but happy to answer as a gut feel – probably yes, as many more people are working from home and relying on networks than ever before – that’s my lay person interpretation but I can’t provide any more context.

Q. Is OMDIA planning to do an update on this research in, say, six months’ time?

Omdia’s research coverage for the critical communications industry has three pillars – mobile radio, critical communications broadband and command and control rooms. Each has its own cycle and presented here is a high-level combination from across the analyst teams. Our research is typically updated annually so we have updated some forecasts at a slightly faster rate than that to really reflect what we’re seeing as the impact of COVID-19, but we’re now shifting back to the traditional update cycles that we had previously.

Q. You mention transport and utilities in one of the early slides, have you identified any opportunities arising for critical comms specific to those sectors?

Something that was outlined on the slides is that we are seeing a transitioning - a substitution of LTE for LMR in the infrastructure. Certainly for the transportation and utility sectors they tend to be ahead when it comes to that activity so there are certainly opportunities in that respect.

Q. There is a huge amount to be done in control room integration of 4G systems as far as I am aware – is that work interrupted and if so how will that impact the go-live of critical broadband?

There is some work to do and I’m not sure how that work has been impacted – my initial suspicion would be that any impact would likely be from the reprioritisation of staffing as we’ve seen through March/April/May 2020. Many public safety staff had to change priorities quite rapidly – if anyone was working on regulation or standardisation aspects, their priorities may have shifted and caused some delays. *Note: TCCAs currently running a task force of interested parties that is working on exactly this topic so we have some background information to impart if anyone is interested, please contact admin@tcca.info for further information. The work of that task force has not been impacted by the pandemic. The resources have been available and work is ongoing.*

Q. When you talk about lower ratepayer revenue impacting projects, is funding not ring-fenced at the beginning of projects, or are they more 'pay as you go'?

It can vary on a project by project and market sector basis – for utilities it may be the case that a certain amount of budget is ring fenced for that project, and certainly projects that are in a fairly advanced state will have the budget already there. More recent projects are unlikely to have ring fenced funds so those are seen as most at risk.

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