

Lawful Interception Market by Component, Network (Fixed Network, Mobile Network), Network Technology Type, Communication Content, Mediation Device, Type of Interception, End User (Lawful Enforcement Agencies, Government) & Region - Global Forecast to 2026

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Abstracts

MarketsandMarkets forecasts the global Lawful Interception Market size is expected to grow USD 3.5 billion in 2021 to USD 12.9 billion by 2026, at a Compound Annual Growth Rate (CAGR) of 29.3% during the forecast period. The rise in dissident activities and terrorism has shown significant growth in the Lawful Interception Market across the globe.

Lawful interception is the legally sanctioned official access to private communications, such as telephone calls or email messages. It is a security process that enables LEA and government agencies to perform electronic surveillance on an individual authorized by judicial or administrative order. To implement the lawful intercept process, certain legislation and regulations require SPs and ISPs to support authorized electronic surveillance. Interception of the data of a particular individual and organization is possible through lawful interception, with pre-approval by the government, and thereby complying with the international standards and national and international standards. Countries around the world are drafting and enacting laws to regulate lawful interception procedures; standardization groups are creating lawful interception technology specifications.

The regulatory mandates for lawful interception have evolved over the years. Most countries in the world share the view that legal interception must be standards-based to

achieve interoperability and smooth cooperation between the legal authorities and operators and between the other legal forces of different countries. The international standards enable lower costs of products and ensure adequate data protection. Lawful interception should comply with some of the international lawful interception standards of ETSI, 3GPP, or CableLabs organizations for wireline/internet, wireless, and cable systems, respectively, to intercept the data for legal authorities. With these regulations, the lawful interception solution and services providers fulfill the highest security requirements to protect sensitive data from unauthorized access and misuse. Countries around the world are drafting and enacting laws to regulate lawful interception procedures, standards, laws, and regulations for creating a standardized lawful interception technology specification.

“By Component, the solutions to record a larger market share during the forecast period”

In the Lawful Interception Market by Component, the services segment is expected to record a larger market share during the forecast period. The standalone lawful interception solution aids in the performance of lawful interception activities in order to meet government-mandated legal standards. The solution includes surveillance tools for both fixed and mobile networks, allowing telecom operators and ISPs to comply with their legal obligations to intercept calls and data while preserving the highest level of privacy protection. The solution window gives end-to-end solutions for the whole intelligence cycle required for an individual or organization to be intercepted. The entire intelligence cycle begins with full-spectrum intelligence capabilities being delivered to Law Enforcement Agencies, Intelligence Organizations, and Signal Intelligence (SIGINT) Agencies. Vendors offering lawful interception solutions and services should comply with international lawful interception standards of ETSI, 3GPP, and ATIS/ANSI and specific country regulations as per the interception.

“By Network, the Mobile Network segment to grow at the higher CAGR during the forecast period”

In the Lawful Interception Market by Network, the Mobile Network segment is expected to grow at the higher CAGR during the forecast period. The mobile network aids in the monitoring of real-time data from any wireless network. 2G, 3G, 4G, 5G, and other wireless access technologies such as WLAN and WiMAX are all part of the mobile network. The mobile network integrates with most of the leading vendors in the lawful interception market. The emergence of smartphones, laptops, and smart gadgets helps the implementation of lawful interception across networks. Lawful interception for mobile

data is implemented in the core network of the operator. In an LTE network, Utimaco LIMS directly interfaces with MME nodes for monitoring control plane data (IRI) and System Architecture Evolution/Packet Data Network Gateway elements for user plane data. In the IP multimedia subsystem or the Voice over LTE core, lawful interception for mobile voice and other multimedia services can be implemented. To intercept target-related communication, LIMS interacts with serving network nodes. All intercepted calls and messages are routed through LIMS and sent to LEA via secure HIs.

“By End User, the Government segment to hold the larger market size during the forecast period”

Government agencies, such as CIA and NSA in the US, GCHQ in the UK, Ministry of Home Affairs and CBI in India, MSS in China, PSIA of Japan, are among the few government agencies of several countries widely adopting the lawful interception solution. For instance, in India, on 20th December 2018, the Ministry of Home Affairs issued an order authorizing ten security and intelligence agencies to intercept, monitor, and decrypt any information in any computer resource in accordance with the Information Technology Act, 2000. Countries, such as the US and the UK, have adopted mass surveillance programs to combat any threat to their national security.

“By Region, Asia Pacific to grow at the highest CAGR during the forecast period”

APAC is expected to grow at the highest CAGR during the forecast period. The APAC region is expected to have the fastest growth rate in the Lawful Interception Market during the forecast period due to its growing adoption of technologies. APAC is one of the fastest-growing economies due to the growing network technologies, digital infrastructure, and smartphone and internet penetration. These factors have stimulated the cases of cybercrimes by using social networks for subversive activities and terrorism in the region. Countries such as India, China, and Japan contribute a major share to APAC's economy. These countries are experiencing a major threat from hacker groups or terror networks with the increasing penetration of digital infrastructure and heavy investment on network technologies by key industry telecom players in the region. The use of social networks to influence netizens and give rise to crimes is one of the major factors that actuate the market for lawful interception in the region. According to a report by GTI, 2019, South Asia had the highest impact from terrorism since 2002, with APAC having the largest proportion of women joining the Islamic State of Iraq (ISIL) and the Levant at 31%. According to a report by the Centre for Strategic and International Studies, 2018, APAC faces a damage cost of USD 171 billion. The breakup of the profiles of the primary participants is given below:

By Company: Tier 1 – 62%, Tier 2 – 23%, and Tier 3 – 15%

By Designation: C-Level Executives – 38%, Directors– 30%, Others*–32%

By Region: North America – 40%, Europe – 15%, APAC – 35%, MEA – 5%, and LA- 5%

This research study outlines the market potential, market dynamics, and major vendors operating in the Lawful Interception market. Key and innovative vendors in the Lawful Interception Market include Utimaco (Germany), Vocal Technologies(US), AQSACOM (US), Verint (US), BAE Systems (UK), Cisco (US), Ericsson (Sweden), SS8 Networks. (US), Elbit Systems (US), Matison (Croatia), Shoghi (India), Comint (Mexico), Signalogic (US), IPS S.P.A (Rome), Tracespan (Israel), Accuris Networks (US), EVE Compliancy Solutions (Netherlands), Squire Technologies (UK), Incognito Software (Canada), GL Communications (US), Septier Communications (Israel), NetQuest (NJ), ETSI (France), Atos (France), Trovicor (Dubai).

Research Coverage

The Lawful Interception Market is segmented on component, network, network technology, communication content, mediation device interface, type of interception, end user and region. A detailed analysis of the key industry players has been undertaken to provide insights into their business overviews; services; key strategies; new service and product launches; partnerships, agreements, and collaborations; business expansions; and competitive landscape associated with the Lawful Interception Market.

Key benefits of buying the report

The report is expected to help the market leaders/new entrants in this market by providing them information on the closest approximations of the revenue numbers for the overall Lawful Interception Market and its segments. This report is also expected to help stakeholders understand the competitive landscape and gain insights to improve the position of their businesses and to plan suitable go-to-market strategies. The report also aims at helping stakeholders understand the pulse of the market and provide them with information on key market drivers, restraints, challenges, and opportunities.

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About

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LI: Market Size and Y-o-Y, 2013–2018, (\$ Million, %)

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