

Mobile Infrastructure Intelligence Service

Part of the Service Provider Networks Service Area Package

Global, in-depth coverage of mobile access and core infrastructure, including 2G, 3G, 4G, LTE, 5G, small cells, and open vRAN

“ The mobile ecosystem is now on its next journey, 5G. But, mobile generations co-exist. Operators must make informed investment decisions. Vendors must make investments that put them in the best position to meet operator requirements. ”

Rémy Pascal

Principal Analyst

Mobile Infrastructure Intelligence Service

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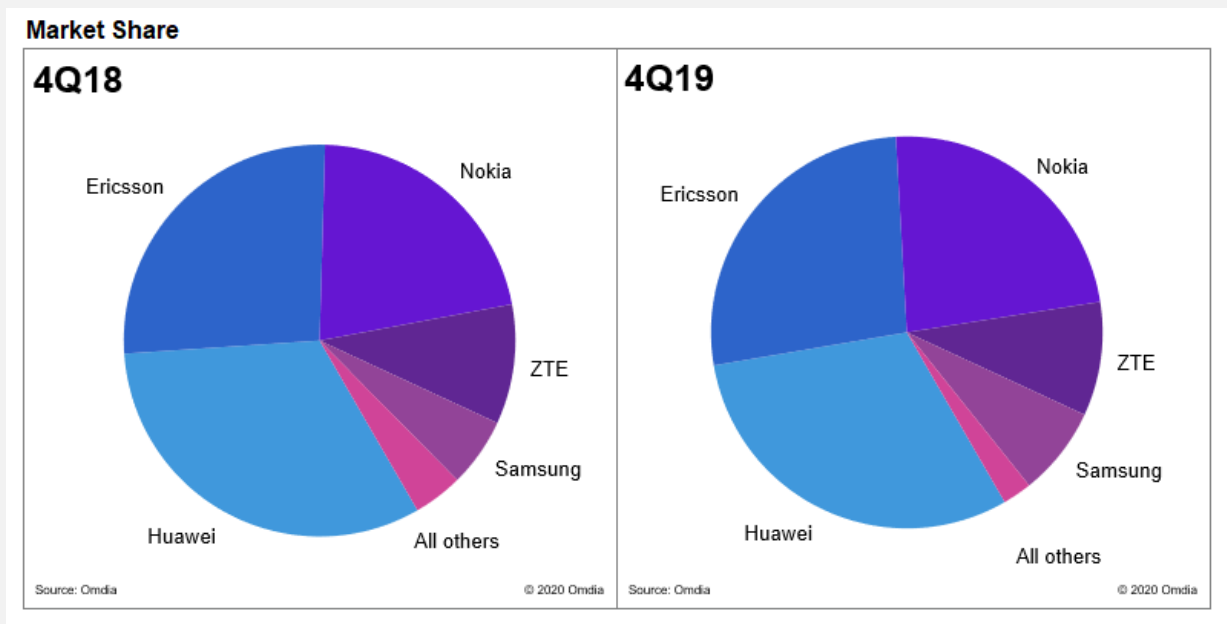
HOW OMDIA HELPS YOU

- Determine product plans and strategies with detailed global coverage of mobile equipment, software, services and subscribers
- Identify shifts in service provider and vendor investment decisions and strategies
- Leverage surveys and channel checks to develop a deeper understanding of customers' evolving needs

KEY QUESTIONS ADDRESSED

- What are the size, share, and forecasts for the mobile infrastructure market by vendor, technology and equipment type ?
- How are operators evolving their network investment decisions to target growth opportunities?
- How can vendors position themselves to meet service provider requirements?
- Which markets and regions provide the best growth opportunities?
- How will new technologies evolve and potentially disrupt the market?

Mobile Infrastructure Market Share



Mobile Infrastructure: Our Expert Analysts



Rémy Pascal
Principal Analyst and
Mobile Infrastructure research
manager



Roberto Kompany
Principal Analyst,
Mobile Infrastructure

Mobile infrastructure: deliverables



MARKET DATA

—Various: Quarterly to Annual—

- Mobile infrastructure market tracker
- Indoor small cells market tracker
 - Open vRAN market tracker



SURVEYS

—Annual—

- Service provider survey



REPORTS

—Ongoing—

Vendor assessments, trends-to-Watch, thematic reports, etc.



ANALYST INSIGHTS

—Ongoing—

Analyst commentary on market shifts, technology and regional developments, vendors, events, and more



PRESENTATIONS

—Ongoing—

Analyst briefings
Analyst conference calls



ANALYST ACCESS

—Ongoing—

For prompt responses to urgent and unique questions

Mobile infrastructure: market data

Mobile infrastructure market tracker: forecast and share

Worldwide and regional market size, vendor shares, forecasts, analysis, and trends for 2G, 3G, 4G, 5G, purpose-built and virtual evolved packet core (EPC and vEPC), and Open virtual RAN (Open vRAN) equipment and software

DETAILS

Frequency: Quarterly

Measures

- Market share
- Revenue
- Units

Regions

- Worldwide
- North America
- Europe, the Middle East & Africa
- Asia-Oceania (China and Rest of Asia)
- Latin America and the Caribbean

COVERAGE

2G and 3G equipment

- RAN: BTS and BSC

LTE equipment

- E-UTRAN: FDD, TDD
- EPC and vEPC

5G equipment

- 5G new radio
- 5G NG core

Open vRAN

Indoor small cells market tracker : forecast and share

Worldwide and regional market size, vendor shares, forecasts, analysis, and trends for indoor small cells. *Historical DAS data also available but no longer updated in 2022.*

DETAILS

Frequency: Annual

Measures

- Market share
- Revenue
- Units

Regions

- Worldwide
- North America
- Europe, the Middle East & Africa
- Asia-Oceania
- Latin America and the Caribbean

COVERAGE

By technology

- 2G-3G
- 4G
- 5G

By type of products

- Pico
- Micro

Mobile infrastructure: market data, reports and survey

Open vRAN Market Tracker

Worldwide and regional market size, forecasts, analysis, and trends for the open vRAN segment.

DETAILS

Frequency: Annual

Measures

- Revenue
- Units

Regions

- Worldwide
- North America
- Europe, the Middle East & Africa
- Asia-Oceania
- Latin America and the Caribbean

COVERAGE

By technology

- 4G
- 5G

By type of products

- Radio unit
- Server
- Software

Reports and survey

Trends to watch : RAN and core

Frequency: Annual

Our yearly roundup of all events and developments that are expected to impact the mobile infrastructure market in the years to come. Typically includes an analysis of emerging technologies, readout on major geo-political events, etc. Separated reports for RAN and core.

Vendor landscape : RAN and core

Frequency: Annual

Omdia's annual assessment of the main RAN and core vendors across two main dimensions : business performance and portfolio breadth and competitiveness. Separated reports for RAN and core.

Tech trend reports

Frequency: quarterly

Topical reports delving deeper into specific technology trends. Topics for 2022 are:

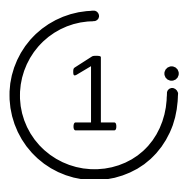
- Open vRAN and the RIC
- The migration to cloud core
- mmWave trends and outlook
- Initiating coverage on 6G

RAN and core service providers survey

Frequency: Annual

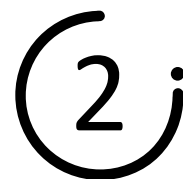
Survey on service providers RAN and core deployment plans and timelines.

Mobile Infrastructure: 2021-2022 Research Themes



5G RAN

In 2021, 5G already represents more than half of operators' RAN spending globally, and this share will continue to increase. While operators in many countries are yet to launch the new service, others are already moving into the second phase of deployment expanding into new locations, using new spectrum and deploying new features.



5G Core

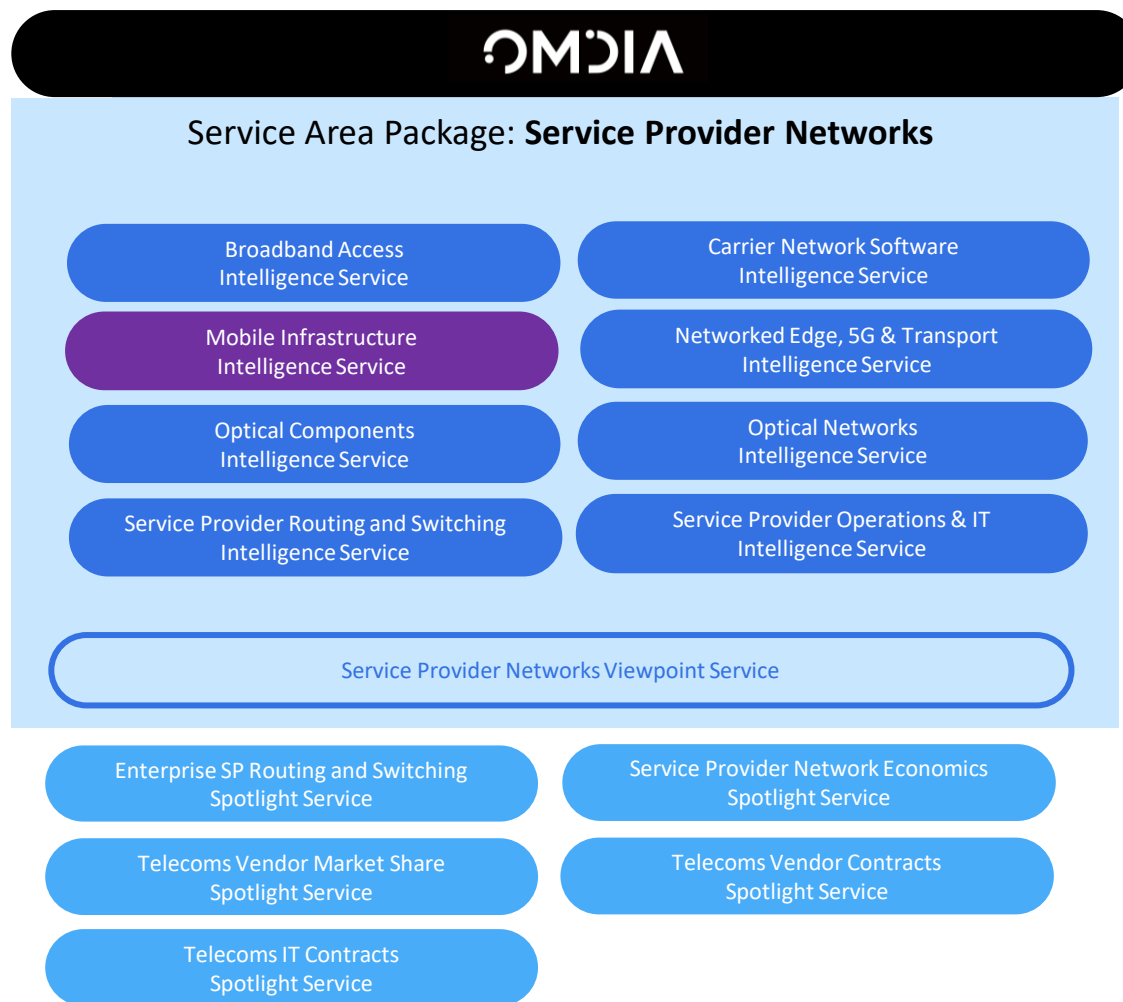
The 5G Core quickly evolves to a “One Core” solution, serving as a key integration point for mobile networks by supporting 2G, 3G, 4G, and 5G services. Cloud providers are embracing the core as a key workload opportunity but face significant challenges to widespread adoption.



Open vRAN

Open virtual RAN (open vRAN) has become an important industry topic. Operators see it as an opportunity to introduce more vendor competition and to reduce the total cost of network ownership. Depending on their position, vendors either see it as an opportunity or an existential threat. Even governments have taken notice of Open vRAN.

Related Content: Service Provider Networks Service Area Coverage



About Omdia’s Service Provider Networks Coverage

Omdia’s Service Provider Networks research services provide expert analysis and data across the complete landscape of telecoms networks, including infrastructure, software and operations. The Networks team supports the broadest coverage in the industry, from mobile access, fixed access and mobile core, to transport, microwave, routing/switching, optical networks and components. Offering specialist coverage on service providers’ own transformation, including telecoms operations and IT, carrier network software, and service provider AI, Omdia’s Networks research provides the unique ability to both deep dive into specific technologies as well as gain higher-level strategic analysis and insight.

Omdia’s Network research complements our Service Provider Consumer and Enterprise research services, enabling us to advise key vendors on their customers’ customers, and guide service providers themselves on the evolving technology supplier and partner landscape. Omdia helps both vendors and service providers assess which applications and products will drive future growth, forecast the adoption and impact of new technologies, benchmark key competitors, target customers, and select suppliers, providing a holistic view of service provider investments across the industry.

Through our coverage of mobile and broadband access and core networks, transport networks, optical networks and components, and service provider transformation, our global team of expert analysts offers unparalleled data and insight as the transformation of service provider networks gathers pace.

Mobile Infrastructure: Migration to a Combined Product

Relevant to Subscribers of Legacy Products:

- ✓ Network Infrastructure and Software (Ovum)
- ✓ Mobile Infrastructure Intelligence Service (IHS Markit Technology)

BENEFITS AND FEATURES OF NEW SERVICE

- **Legacy Ovum Network Infrastructure and Software Subscribers:**
 - More frequent and granular market shares and forecasts
- **Legacy IHSM Mobile Infrastructure Intelligence Service Subscribers:**
 - Increased volume and frequency of thematic and strategic reports

OTHER CHANGES

- Consolidating China regional report into the overall market trackers and reports – and no longer splitting out India
- Continuous review of coverage for market reports
- Removing Software as a separate category from legacy IHSM tracker
- Reviewing coverage of units from core tracker

Our “Ask an Analyst” Service Provides Best in Class Customer Support

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ABOUT OMDIA

Omdia is a global technology research powerhouse, established following the merger of the research division of Informa Tech (Ovum, Heavy Reading, and Tractica) and the acquired Omdia technology research portfolio*. We combine the expertise of more than 400 analysts across the entire technology spectrum, covering 150 markets. We publish over 3,000 research reports annually, reaching more than 14,000 subscribers, and cover thousands of technology, media, and telecommunications companies.

Our exhaustive intelligence and deep technology expertise enable us to uncover actionable insights that help our customers connect the dots in today's constantly evolving technology environment and empower them to improve their businesses—today and tomorrow.

* The majority of Omdia technology research products and solutions were acquired by Informa in August 2019 and are now part of Omdia.