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Mobile Infrastructure Spotlight Service

Complementing the Service Provider Networks Service Area Package

The most comprehensive coverage of mobile access and core infrastructure available. This spotlight service builds on our intelligence service with deeper insight into the mobile core market, including regional market shares, analysis of EPC, vEPC and 5GC investment, and the shift to the cloud and cloud-native architectures. It also includes detailed coverage of access technology markets including RAN, open vRAN and proprietary vRAN, macro cells and small cells.

PRODUCT OVERVIEW | Mobile Infrastructure Spotlight Service

The 5G core and standalone architecture are must-have to deliver the full 5G capabilities and experience, which in turn are critical enablers for service providers to monetize 5G.

Rémy Pascal
Principal Analyst

Mobile Infrastructure Spotlight Service

Complementing the Service Provider Networks Service Area Package

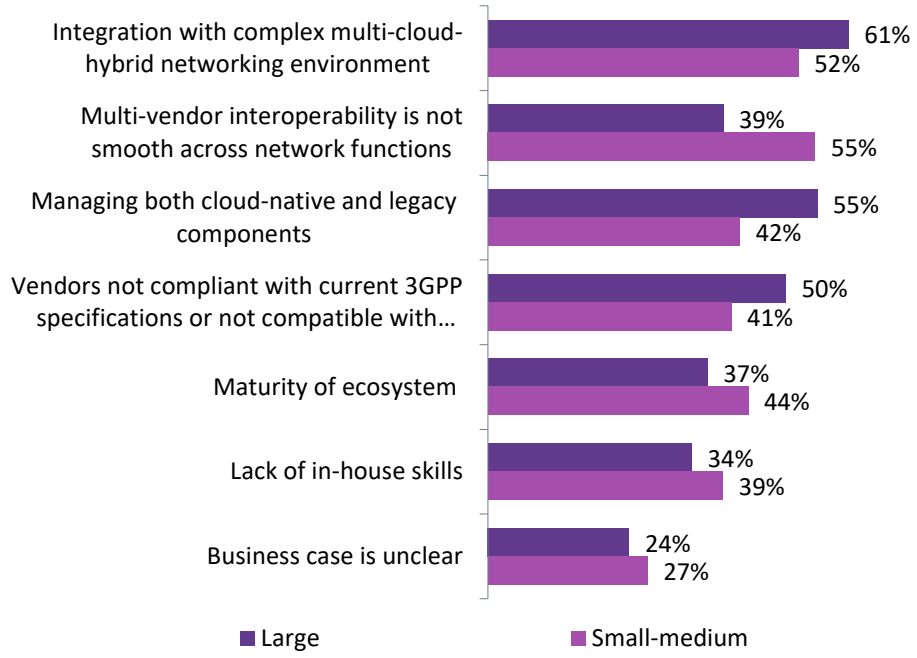
HOW OMDIA HELPS YOU

- Understand the challenges and monetization opportunities with 5G core
- Understand the infrastructure required and the new technologies involved
- Identify shifts in service provider and vendor investment decisions and strategies across mobile equipment, software and services

KEY QUESTIONS ADDRESSED

- What are the industry trends and CSP strategies in different aspects of 5G core deployments and operations
- What is the market share by vendor for packet core equipment, software and services by region?
- What are the benefits of the other 5G core network functions beyond the packet core?
- How can vendors deliver their 5G core network functions in a multi-vendor architecture
- 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?

What are the main challenges you face in deploying 5G core network?



Source: Omdia, Mobile Infrastructure – Core survey, 2023

Mobile Infrastructure Spotlight Service: Our Expert Analysts

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OMDIA

Mobile Infrastructure Spotlight Service: Deliverables

MARKET DATA

Core market tracker **(incl. regional market share),** RAN market tracker, Open vRAN and vRAN market tracker, Indoor small cells market tracker (Market share, size and forecasts)

SURVEYS

Service provider survey – Core **(Extended Version),** Service provider survey – RAN

REPORTS

Deep dives on technologies, markets, companies. Vendor assessments, Trends-to-Watch, Technology trends reports – **including exclusive Spotlight titles covering mobile core**

.

PRESENTATIONS

Analyst briefings and conference calls

ANALYST INSIGHTS

Analyst commentary on market developments, post event reports

ANALYST ACCESS

Prompt responses from Omdia's analyst team to urgent and unique questions.

Mobile Infrastructure Spotlight Service: Market Data

Core Market Tracker (Extended Version) Data and Analysis Report

Spotlight Version!

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

DETAILS

Frequency: Quarterly

Measures

- Market share (Global/Regional)
- Revenue

Regions

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

COVERAGE

LTE equipment

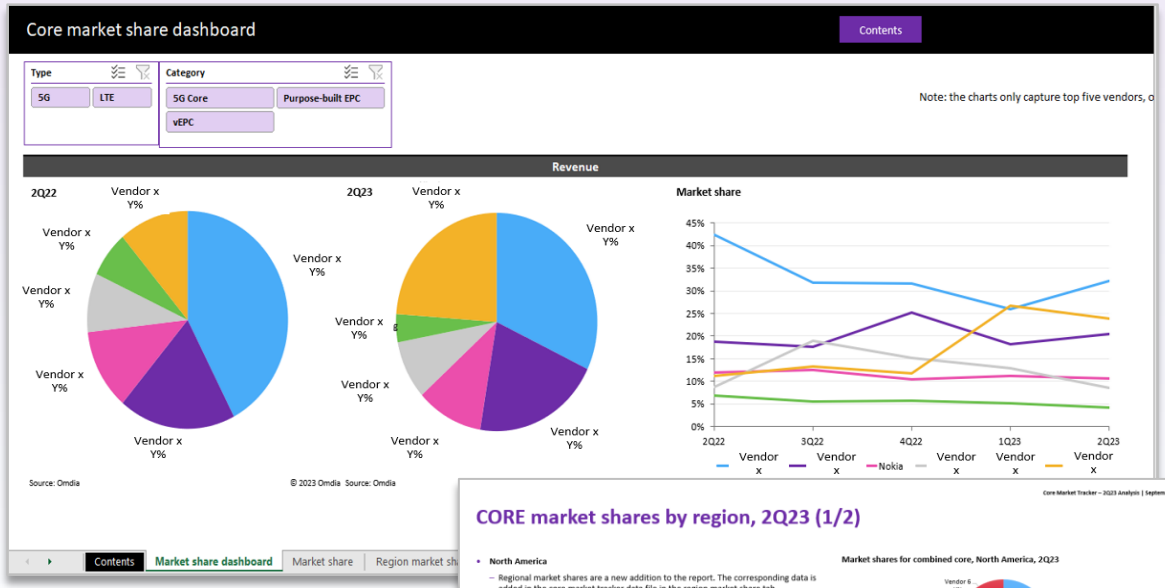
- EPC and vEPC

5G equipment

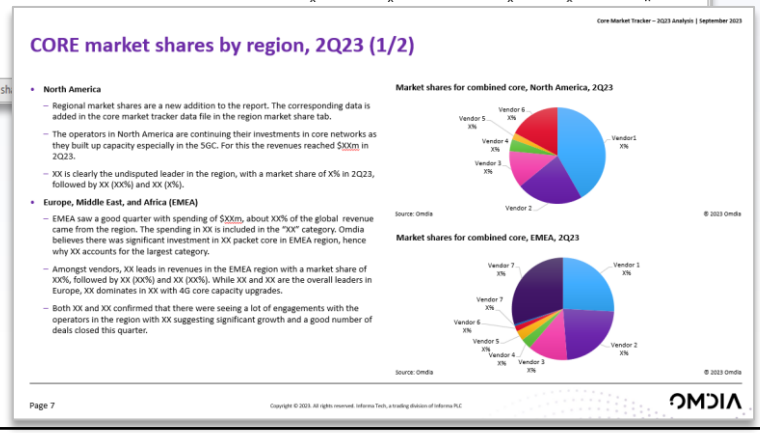
- 5G NG core

New in 2024

- Beyond Packet Core



With regional market share



Mobile Infrastructure Spotlight Service: Reports & Core Survey

Tech Trend Reports

Additional Spotlight Titles!

Frequency: Quarterly

Topical reports delving deeper into specific technology trends for RAN and Core markets. Planned additional mobile core Spotlight only titles for 2023 include:

- Tech Trend: 5G SA Core Network Slicing
- Tech Trend: Packet Core Challengers
- Tech Trend: 5G voice – VoNR

Further published or planned titles covering RAN:

- Tech Trend Report RAN: 5G-Advanced Radio Access – Key Features and Perspectives
- Tech Trend Report RAN: RAN energy efficiency, key drivers, and areas of improvement
- Tech Trend Report RAN: An update on indoor 5G
- Tech Trend Report RAN: 6G candidate technologies

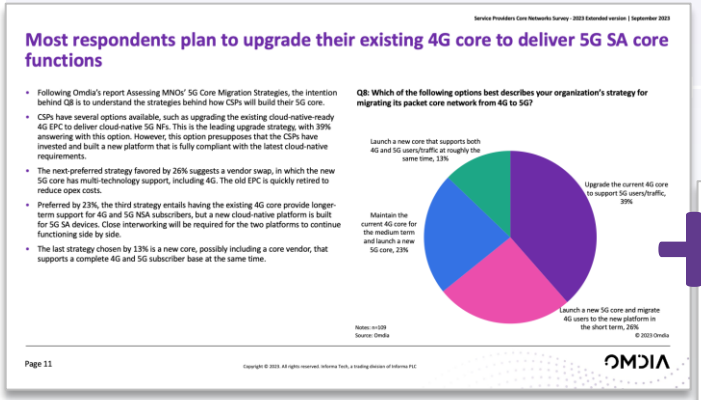
Mobile Infrastructure Survey - Core

Spotlight Version!

Frequency: Annual

Survey on service providers core deployment plans and timelines: Service Provider Mobile Infrastructure Survey – Core 2023 (Extended Spotlight survey)

- The Spotlight version provides additional slides with views and analysis of the data, such as by region where the CSPs operate, by size of the CSPs and by roles of respondents



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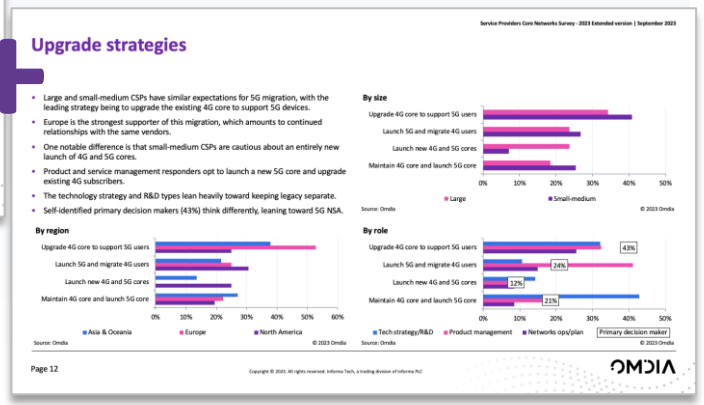

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Mobile Infrastructure Spotlight Service: Market Data

RAN Market Tracker

Worldwide and regional market size, vendor shares, forecasts, analysis, and trends for 2G, 3G, 4G, 5G, 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

5G equipment

- 5G new radio: sub-6Ghz, mmWave

Open vRAN & vRAN Market Tracker

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

DETAILS

Frequency: Bi-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
- NFV infrastructure
- Baseband software

Mobile Infrastructure Spotlight Service: Market Data & RAN Survey

Indoor Small Cells Market Tracker

Worldwide and regional market size, vendor shares, forecasts, analysis, and trends for indoor small cells. *Historical DAS data also available but not updated from 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 Survey – RAN

Survey on service providers' RAN deployment plans and timelines.

Frequency: Annual

- The 2023 RAN survey reveals CSPs' plans, priorities, and expectations in North America, Europe, and Asia & Oceania

Mobile Infrastructure Spotlight Service: Reports & Vendor Landscape

Trends to Watch: RAN and Core

Frequency: Annual

Our RAN and Core Trends to Watch reports together provide a yearly roundup of all events and developments that are expected to impact the mobile infrastructure market in the years to come. They typically include analysis of emerging technologies, readout on major geo-political events, etc.

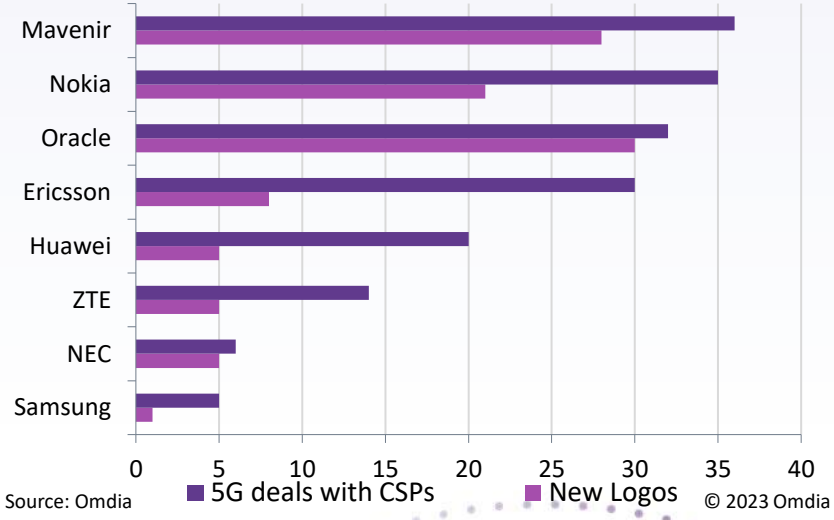
Vendor Landscape: RAN and Core

Frequency: Annual

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

- Market Landscape: Core Vendors 2023
- Market Landscape: RAN Vendors 2023

Vendor Landscape: Core - Number of 5G commercial deals with CSPs and new logos (2022)



Source: Omdia

Mobile Infrastructure: Intelligence Service vs. Spotlight Service

Mobile Infrastructure Intelligence Service

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

Market sizing/ Market share/ Market analysis

- **Core Market Tracker**
- **RAN Market Tracker**
- **Open vRAN and vRAN Market Tracker**
- **Indoor Small Cells Market Tracker**

Service provider surveys

- **Core market survey**
- **RAN market survey**

Technology trends/ Trends to Watch reports

Including:

- **5G-Advanced Radio Access – Key Features and Perspectives**
- **New Business Models Are Key to Addressing the Challenges of 5G Core Development**
- **RAN energy efficiency, key drivers and areas of improvement**
- **2024 Trends to Watch: Core**
- **2024 Trends to Watch: Radio Access Network**

Mobile Infrastructure Spotlight Service

Access all the research and data included in the Intelligence Service plus **deeper coverage of the mobile core market**, including regional market share, analysis of EPC, vEPC and 5GC investment, and the shift to the cloud and cloud-native architectures.

Explore market share at the regional level for combined packet core vendors with the **expanded Core Market Tracker in the Spotlight Service**. Coverage: North America, EMEA, Asia Oceania, Latin America and the Caribbean (available for 2Q23 data onwards).

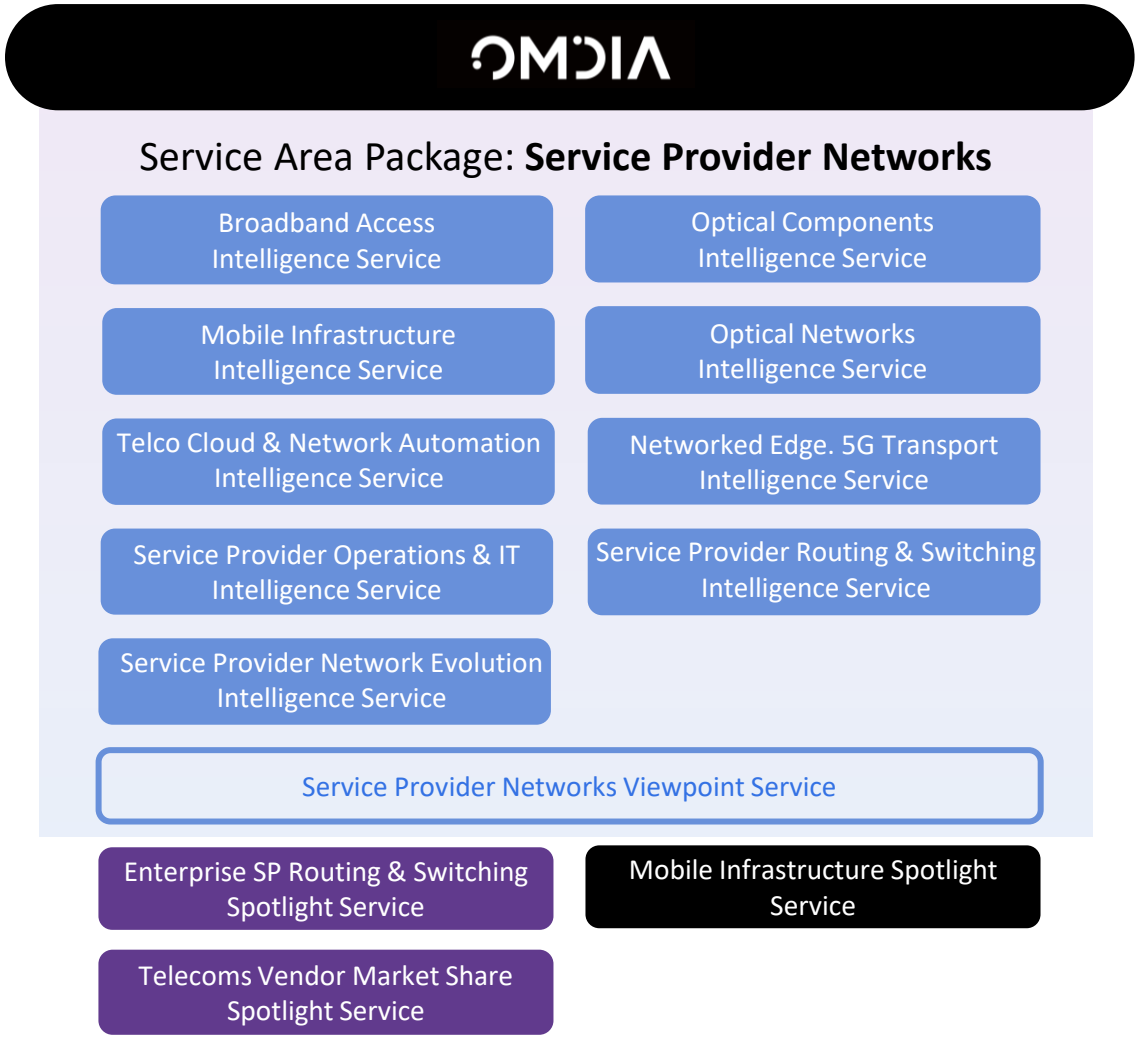
Gain deeper insight into Service Provider's deployment plans for mobile core solutions including timelines with the **extended Core Market survey in the Spotlight Service**.

Understand the latest core market technology trends and their implications for vendors with **additional Technology Trends reports in the Spotlight Service**: incl: Addressable market for packet core challengers (incl. forecast); Profile of challengers and new core vendors; Network Slicing; Voice over New Radio

Mobile Infrastructure: Research Themes for 2023/ 2014

5G core network functions beyond the packet core	5G core is already a priority coverage area. Coverage will expand beyond packet core to new 5G core functions such as Network Slice Selection Function (NSSF), Network Repository Function (NRF) and Service Control Point (SCP), as well as associated topics such as policy and charging. New operational models will also be covered, as well as those technology developments supporting 5G Advanced and the path to 6G.
Open vRAN and future mobile infrastructure evolution	Open vRAN is attracting much attention because of its potential impact on the industry. It Is not just about open RAN and vRAN technology changes but also the wider impact of these on the mobile infrastructure and software vendor ecosystems and supply chains, and future mobile network evolution.

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.

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

Whether you need guidance to navigate the service, information regarding our methodologies or you want to better understand a data trend, Omdia’s support team is here to help.

Draw on our expertise

- Make the right decisions
- Sanity-check your own findings
- Get the most out of your subscription
- Understand more about our methodologies

Our Ask an Analyst service gives you direct contact via telephone, email or face-to-face session with our expert analyst team:

Shelley Hunter
Customer Success Manager

Kâren Dyer
Customer Success Manager

Thank you

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