

The Self-Organizing Networks (SON) Ecosystem: 2014 - 2020

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Abstracts

Self-Organizing Network (SON) technology minimizes the lifecycle cost of running a wireless carrier network by eliminating manual configuration of equipment at the time of deployment, right through to dynamically optimizing performance and troubleshooting during operation. This can significantly reduce the cost of the carrier's services, improving the OpEx to revenue ratio.

Amid growing demands for mobile broadband connectivity, wireless carriers are keen to capitalize on SON to minimize rollout delays and operational expenditures associated with their ongoing LTE and small cell deployments.

Originally targeted for the Radio Access Network (RAN) segment of wireless carrier networks, SON technology is now also utilized in the mobile core and mobile backhaul segments. Furthermore, the SON ecosystem is increasingly witnessing convergence with other technological innovations such as Big Data analytics and Deep Packet Inspection (DPI).

Despite challenges relating to implementation complexities and multi-vendor interoperability, SON revenue is expected to grow to more than \$3 Billion by the end of 2016, exceeding conventional mobile network optimization revenue by over 20%.

The "Self-Organizing Networks (SON) Ecosystem: 2014 – 2020" report presents an in-depth assessment of the SON and associated mobile network optimization ecosystem including key market drivers, challenges, OpEx and CapEx savings potential, use cases, SON deployment case studies, future roadmap, value chain, vendor analysis and strategies. The report also presents revenue forecasts for both SON and conventional mobile network optimization, along with individual projections for 8 SON

submarkets from 2014 through to 2020. Historical figures are also presented for 2010, 2011, 2012 and 2013.

The report comes with an associated Excel datasheet suite covering quantitative data from all numeric forecasts presented in the report.

Contents

LIST OF COMPANIES MENTIONED:

The following companies and organizations have been reviewed, discussed or mentioned in the report:

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Aero2
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Aeronet
Aexio
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Aircell

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Andorra Telecom
Andrew
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Antel
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Aptilo
Aqiva Wireless
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Arcadyan
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ARIB (Association of Radio Industries and Businesses, Japan)
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ARItel
Armentel
Aruba Networks
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Asiaspace
Askey
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AT&T Mobility
ATDI
Athena Wireless Communications
ATIS (Alliance for Telecommunications Industry Solutions, U.S.)
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Avanti
Avea
Aviat Networks
Avvasi
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Axerra Networks
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Azercell
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Beeline
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BeICel
Belgacom / Proximus
Bell Mobility
BendBroadband
BeST (Life)
BH Telecom
Bharti Airtel
Bhutan Telecom
Big Switch Networks
BigAir
BLiNQ Networks
Bluegrass Cellular
Blueline
BluWan
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Brazil Army
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BridgeWave Communications
Broadcom
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BT
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BUCD
Bulgaria Vivacom
Bytemobile
C Spire Wireless
C&S
Cable and Wireless
Cambium Networks
Canoga Perkins
Carolina West Wireless
Carrier Access Corporation
Cavium
CBL Bahamas
CBNL (Cambridge Broadband Networks Limited)
CCI (Communication Components Inc.)
CCS
CCSA (China Communications Standards Association, China)
CDMA Development Group
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CeedTec
Celcite
Cell C
Cellcom
CellO
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Cellwize
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CENTRI

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Ceragon
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Chat Mobility
China Mobile
China Mobile Hong Kong
China Telecom
China Unicom
CHT
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Cisco Systems
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Claro
Clear Mobitel
CNT
COAI (Cellular Operators Association of India)
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Coherent Logix
Colorado Valley
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Commsquare
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Continuous Computing
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Copper Valley Telecom
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Cosmote
COTA Murcia4G
Cross Telephone
Crown Castle
CSI
CSL Limited

Custer Telephone
Cyan
Cyan
Datame
DBD
Dedicado
DeltaNode
Deutsche Telekom
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Dialogic
DiGi
Digicel
Digicel Fiji
Digitel
Digitel Jamaica
Dish Network
D-Link
DNA
DoCoMo Pacific
DragonWave
DTAC – TriNet
DTM (Datang Mobile)
Du
E Plus
eAccess
Eastlink
E-Band Communications
ECE (European Communications Engineering)
ECI Telecom
Econet Wireless
Eden Rock Communications
Edgewater
EE
EION
Elisa
EMT
Emtel
EnergyAustralia Ausgrid

EnGenius
Entel Movil
Entel PCS
Entel Peru
Enterasys
ERA/T-Mobile Poland
Ericsson
ETC
Etex Telephone Co-op
EtherReach
Ethertronics
Ethio Telecom
Ethos
Etisalat
Etisalat Misr
ETRI (Electronics and Telecommunications Research Institute)
ETSI (European Telecommunications Standards Institute)
Evolve Broadband
Exalt
ExteNet Systems
Extreme Networks
FarEasTone
FastBack Networks
Fastlink (Regional Telecom)
Femtel
FibroLAN
Firetide
Fitel
Fjarlskipi (Vodafone Iceland)
Forsk
Fortinet
FPT Telecom
Freescale Semiconductor
Fujitsu
Gemtek
Genband
Georgia Magticom
Glo Mobile
Globacom

Global Mobile
Globe
GoNet Systems
Goodman Networks
Gore
GrenTech
GSA
GSMA (GSM Association)
Guavus
Guineanet
GWT (Global Wireless Technologies)
Handlink
Hatteras
Hitachi
HP
Huahuan
Huawei
Hutchison 3
IBW International
ICE
iConnect
IDC Moldova
iDirect
IEEE (Institute of Electrical and Electronics Engineers)
IM2
Imagine Group
IMS Forum
InfoCommunication Union
InfoVista
Ingenia Telecom
InnerWireless (Acquired by Black Box)
Intel
InterDigital
Intracom
Intucell Systems
Inwi
Iowa Statewide Interoperable Communications Board (ISICSB)
ip.access
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IPV6 Forum
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MTS
MTS Allstream
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Nawras
NBN Co.
Ncell
NEC
Neo-Sky
Neotel
Nepal Telecom
NetGear
NetLogic Microsystems
Netronome
Newfield Wireless
NewNet
Nexius
NGMN (Next Generation Mobile Networks)
NITA
Node-H
Nomadix
Nomor Research
Nortel Networks
NorthwestCell
Nova
NSN (Nokia Solutions & Networks)
nTelos
nTelos Wireless
NTT DoCoMo
Nuage Networks (Alcatel-Lucent)
O2 Secure Wireless
Octasic
Oi
Omantel
Omnitel
On Telecomunicacoes
ONE
Ooredoo
Open Mobile
Optimi
Optimus
Optiway

Optulink
Optus
Orange Armenia
Orange Austria
Orange Dominicana
Orange France
Orange Liechtenstein
Orange Luxembourg
Orange Mauritius
Orange Moldova
Orange Romania
Orange Slovak Republic
Orange Spain
Orange Switzerland
Orange Uganda
Orckit Corrigent
Osnova Telecom
Overture
P&T
P.I.Works
P1 Networks
P4 (Play)
Pandetel
Panhandle Telephone Co-op
PCCW
Peoples Telephone Co-op
Personal
PicoChip
Pioneer Cellular
Plano Engineering
Plexxi
Polkomtel Plus
Positron-Aktino
Powerwave Technologies
Proxim
PTK Centertel (Orange)
Public Service Wireless
Public Wireless
PureWave Networks

PVT
Qualcomm
Quortus
R (Spain)
RAD Data Systems
RADCOM
Radisys
RADWIN
Rakon
RCS & RDS
Redline Communications
REDtone
Reliance
Reverb Networks
RF Window
RFNet
RFS (Radio Frequency Systems)
Rogers Wireless
Rohde & Schwarz
Rorotika
Rostelecom
Ro-Timak Technology
Ruckus Wireless
RusViet Telecom
S and R Communications
S&T Telephone Cooperative
Safaricom
Sagebrush Cellular (Nemont)
Sagem
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SpeedConnect
SpiderCloud Wireless
Sprint
Sprint Nextel
Sprocket Wireless
SRT Communications
SSTL
Star Microwave
Starcomms
StarHub
STC
Strata Networks
Strix Systems
Sub10 Systems
Sunrise Communications
Surflink Communications
SWIFT Networks
Swisscom

Sycamore
Symena
Syringa Wireless
T Mobile
Tango
Tango Networks
Taqua
Tarana Wireless
Tata Elxsi
TCCA (TETRA and Critical Communications Association)
TDC
TD-Forum
TDIA (TD Industry Alliance)
TE Connectivity (Tyco Electronics Connectivity)
Tecom
TEKTELIC
Tektronix Communications
Telcel
Telco Systems
Tele2
Tele2 Kazakhstan
Tele2 Sweden
Telecom Italia Mobile (TIM)
Telecom Malaysia
Telecom New Zealand
Telefonica Movistar
Telefonica O2
Telefonica O2 Ireland
Telefonica O2 UK
Telefonica Peru
Telefonica Spain
Telekom Srpske
Telenet Belgium
Telenor Denmark
Telenor Hungary
Telenor Montenegro
Telenor Norway
Telenor Sweden
Telesis

TeliaSonera
TeliaSonera Norway
TeliaSonera Sweden
Telkom Mobile (8ta)
Telkomsel Indonesia
Tellabs
Telrad
Telstra
Telus
TEOCO
Teradata
Texas Energy Network
Texas Instruments
TFL
Theta Networks
Thomson
T-Hrvatski Telekom
Thumb Cellular
Tigo
Tikona
TIM Brasil
TM Forum (TeleManagement Forum)
TMC
TMN (Portugal Telecom)
T-Mobile Czech Republic
T-Mobile Hungary
T-Mobile Macedonia
T-Mobile Netherlands
T-Mobile Puerto Rico
T-Mobile Slovensko
T-Mobile USA
TN Mobile
TOT Thailand
TPG Internet
TP-Link
TRaC Global
Trango Systems
Transmode
Tranzeo

Trendium
Triatel
Tricom
Tropos
True Move
TSKL
TTA (Telecommunications Technology Association, Korea)
TTC (Telecommunication Technology Committee, Japan)
TTG International
TTK
Tulinx
Tunisia
Turkcell
U Mobile
UbeeAirWalk
Ubidyne GmbH
Ubiquisys
Ubiquiti Networks
u-blox
UCell
UK Broadband
Ulusnet
Umniah
UMTS Forum
Une-EPM
United Wireless
Unitel
US Cellular
Vainakh Telecom
VDC (VNPT)
Vector
Velatel
Velatel-Aerostrong
Verizon Wireless
Videocon
Videotron
Viettel
Vimpelcom
VIP mobile

VIPNet
Visafone Communications
Viva
Vivacell-MTS
Vivato
Vivo
VMWare
Vodacom
Vodacom Tanzania
Vodafone
Vodafone Australia
Vodafone Czech Republic
Vodafone Egypt
Vodafone Fiji
Vodafone Greece
Vodafone Ireland
Vodafone Italy
Vodafone New Zealand
Vodafone Portugal
Vodafone Qatar
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Vodafone UK
Vox
VTel Wireless
Vubiq
Wataniya
Wataniya Telecom
WBS (iBurst)
WebRadar
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Wi-Ex
Wilson Electronics
Wind
Wind Mobile
WNC (Wistron NeWeb Corp.)
Woosh
Xceed Technologies
Xilinx

XL Axiata
Xplornet
Yoigo
Yota
YTL Communications Yes
Zain
Zain Jordan
Zain Saudi
Zamtel
Zhone
Ziggo
Zinwave
Zoda Fones
ZTE

About

SON offers an opportunity to minimize the lifecycle cost of running a network by eliminating the cumbersome process of manually configuring the network at the time of deployment, right through to dynamically optimizing performance during the network's commercialization. This can significantly reduce the cost of the carrier's services, improving the OpEx to revenue ratio.

Global Wireless Network Infrastructure Revenue by Submarket: 2010 – 2020 (\$ Million)

The increasingly heterogeneous nature of these network investments brings significant operational challenges in terms of human labor and consequently cost. Manually configuring and optimizing these networks can often lead to significant delays before a network is stable enough to be commercialized.

SON allows wireless carriers to avoid these operational challenges by automating the planning, configuration and ongoing optimization of these networks, thus minimizing rollout delays and reducing operational expenditures.

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