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The Shared & Unlicensed Spectrum LTE/5G Network Ecosystem: 2023 – 2030 – Opportunities, Challenges, Strategies & Forecasts

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Abstracts

As the 5G era advances, the cellular communications industry is undergoing a revolutionary paradigm shift, driven by technological innovations, liberal regulatory policies and disruptive business models. One important aspect of this radical transformation is the growing adoption of shared and unlicensed spectrum – frequencies that are not exclusively licensed to a single mobile operator.

Telecommunications regulatory authorities across the globe have either launched or are in the process of releasing innovative frameworks to facilitate the coordinated sharing of licensed spectrum. Examples include but are not limited to the three-tiered CBRS (Citizens Broadband Radio Service) spectrum sharing scheme in the United States, Germany's 3.7-3.8 GHz and 28 GHz licenses for 5G campus networks, United Kingdom's shared and local access licensing model, France's vertical spectrum and sub-letting arrangements, Netherlands' geographically restricted mid-band spectrum assignments, Switzerland's 3.4 – 3.5 GHz band for NPNs (Non-Public Networks), Finland's 2.3 GHz and 26 GHz licenses for local 4G/5G networks, Sweden's 3.7 GHz and 26 GHz permits, Norway's regulation of local networks in the 3.8-4.2 GHz band, Poland's spectrum assignment for local government units and enterprises, Bahrain's private 5G network licenses, Japan's 4.6-4.9 GHz and 28 GHz local 5G network licenses, South Korea's e-Um 5G allocations in the 4.7 GHz and 28 GHz bands, Taiwan's provision of 4.8-4.9 GHz spectrum for private 5G networks, Hong Kong's LWBS (Localized Wireless Broadband System) licenses, Australia's apparatus licensing approach, Canada's planned NCL (Non-Competitive Local) licensing framework and Brazil's SLP (Private Limited Service) licenses.

Another important development is the growing accessibility of independent cellular

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networks that operate solely in unlicensed spectrum by leveraging nationally designated license-exempt frequencies such as the GAA (General Authorized Access) tier of the 3.5 GHz CBRS band in the United States and Japan's 1.9 GHz sXGP (Shared Extended Global Platform) band. In addition, vast swaths of globally and regionally harmonized license-exempt spectrum – most notably, the 600 MHz TVWS (TV White Space), 5 GHz, 6 GHz and 60 GHz bands – are also available worldwide, which can be used for the operation of unlicensed LTE and 5G NR-U (NR in Unlicensed Spectrum) equipment subject to domestic regulations.

Collectively, ground-breaking spectrum liberalization initiatives are catalyzing the rollout of shared and unlicensed spectrum-enabled 5G NR and LTE networks for a diverse array of use cases – ranging from mobile network densification, FWA (Fixed Wireless Access) in rural communities and MVNO (Mobile Virtual Network Operator) offload to neutral host infrastructure and private cellular networks for enterprises and vertical industries such as agriculture, education, healthcare, manufacturing, military, mining, oil and gas, public sector, retail and hospitality, sports, transportation and utilities.

SNS Telecom & IT estimates that global investments in 5G NR and LTE-based RAN (Radio Access Network) infrastructure operating in shared and unlicensed spectrum will account for more than $1.4 Billion by the end of 2023. The market is expected to continue its upward trajectory beyond 2023, growing at a CAGR of approximately 27% between 2023 and 2026 to reach nearly $3 Billion in annual spending by 2026.

The “Shared & Unlicensed Spectrum LTE/5G Network Ecosystem: 2023 – 2030 – Opportunities, Challenges, Strategies & Forecasts” report presents a detailed assessment of the shared and unlicensed spectrum LTE/5G network ecosystem, including the value chain, market drivers, barriers to uptake, enabling technologies, key trends, future roadmap, business models, use cases, application scenarios, standardization, spectrum availability and allocation, regulatory landscape, case studies, ecosystem player profiles and strategies. The report also provides global and regional forecasts for shared and unlicensed spectrum LTE/5G RAN infrastructure from 2023 to 2030. The forecasts cover two air interface technologies, two cell type categories, two spectrum licensing models, 15 frequency bands, seven use cases and five regional markets.

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

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