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The TD-LTE Ecosystem: 2015 - 2020 - Infrastructure, Devices, Subscriptions & Operator Revenue

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Abstracts

FDD still remains the prevalent standard for LTE deployment as a natural progression path for GSM, W-CDMA and CDMA network operators. However, unpaired TDD spectrum costs significantly less per MHz/population than its FDD equivalent and is more widely available.

Driven by the technology's lower deployment costs and spectrum availability, the industry has witnessed several prominent TD-LTE network deployments across the globe including SoftBank in Japan, Sprint in the U.S. and Bharti Airtel in India. In particular, China Mobile's TD-LTE network launch has enabled the TD-LTE ecosystem to reach a significant scale of economy, boosting further infrastructure and device investments in TD-LTE technology.

More than a hundred operators have committed to deploy TD-LTE networks throughout the globe. Furthermore, all major device OEMs, including smartphone leaders Apple and Samsung, have commercially launched TD-LTE compatible devices. A large proportion of these devices support both TDD and FDD modes of operation, over multiple frequency bands.

Driven by the thriving ecosystem, TD-LTE operator service revenue is expected to account for over $230 Billion by the end of 2020. By this period, TD-LTE networks will serve nearly 1 Billion subscribers worldwide.

The "TD-LTE Ecosystem: 2015 – 2020 – Infrastructure, Devices, Subscriptions & Operator Revenue" report presents an in-depth assessment of the TD-LTE market including key market drivers, challenges, operator revenue potential, infrastructure/device deployment commitments, future roadmap, value chain, vendor

strategies and strategic recommendations. The report also presents revenue and shipment market size and forecasts for both infrastructure and devices, along with subscription and service revenue projections for the LTE market as a whole, as well as separate projections for the TD-LTE and LTE FDD sub-markets from 2015 through to 2020. Historical figures are also presented for 2010, 2011, 2012, 2013 and 2014.

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

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Acer
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ADIV
Aero2

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Xiaomi
Xplornet Communications
Yemen Mobile

YooMee Africa
Yota Devices
YTL Communications
Yulong Computer
Z-com (ZDC Wireless)
ZTE

About

The report covers the following topics:

TD-LTE infrastructure

TD-LTE devices

TD-LTE spectrum

TD-LTE subscriptions and service revenues

TD-LTE network deployment case studies

Market drivers and barriers

TD-LTE infrastructure and device vendor assessment

Wireless network infrastructure industry roadmap and value chain

Company profiles and strategies of TD-LTE ecosystem players

Interview transcripts from two leading players in the TD-LTE ecosystem; Intel and Sequans

Market analysis and forecasts from 2014 till 2020

Strategic recommendations for TD-LTE operators, infrastructure and device vendors

· Historical Revenue & Forecast Segmentation

Market forecasts and historical revenue/unit shipment/subscription figures are provided for each of the following submarkets and their subcategories:

1. LTE Infrastructure Shipments & Revenue

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TD-LTE Macrocell eNodeBs (eNBs)

LTE FDD Macrocell eNBs

LTE FDD Small Cells

TD-LTE Small Cells

EPC

2. LTE Device Shipments & Revenue

TD-LTE

LTE FDD

Form Factor (Embedded Cards, Consumer Gadgets, Netbooks, PCs, Routers, Smartphones, Tablets and USB Dongles)

3. LTE Subscriptions and Operator Service Revenue

TD-LTE

LTE FDD

4. Regional Markets

Asia Pacific

Eastern Europe

Latin & Central America

Middle East & Africa

North America

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Western Europe

5. Top 20 Country Markets

Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, Korea, Malaysia, Mexico, Philippines, Poland, Russia, Saudi Arabia, Spain, UK and USA

· Key Questions Answered

The report provides answers to the following key questions:

How big is the TD-LTE ecosystem?

How is the TD-LTE ecosystem evolving by segment and region? What will the market size be in 2020 and at what rate will it grow?

What trends, challenges and barriers are influencing its growth?

Who are the key TD-LTE vendors and what are their strategies?

What strategies should be adopted by wireless carriers, infrastructure and device vendors to remain a dominant market force in the TD-LTE ecosystem?

How much are vendors and operators investing in TD-LTE?

How low is the Total Cost of Ownership (TCO) of a TD-LTE deployment in comparison to a FDD LTE network?

What opportunities exist for TD-LTE small cells in the 3.5 GHz and above spectrum bands?

How will TD-LTE ARPU evolve overtime?

Which countries will see the highest number of TD-LTE subscriptions?

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Will all WiMAX operators transition to TD-LTE?

Key Findings

TD-LTE infrastructure investments on macrocell and small cell equipment are expected to grow at a CAGR of 15% over the next 6 years, eventually reaching $13 Billion by the end of 2020

By 2020, TD-LTE subscriptions will also reach nearly 1 Billion, and account for over $230 Billion in service revenues

2014 will see large scale commercialization of TD-LTE capable smartphones. TD-LTE device shipments will surpass 100 Million in 2014 alone, driven by recent and upcoming TD-LTE smartphone launches

Utilizing 3.5 GHz and above TDD spectrum bands can significantly improve network performance and help operators in leveraging new technologies such as LTE Hotspot Improvements (LTE-Hi)

2014 will see a significant improvement in the scale of economy for the TD-LTE ecosystem, and tighter integration between TDD and FDD

Huawei currently leads the TD-LTE infrastructure market share. However, Ericsson is expected to capitalize on upcoming deployments opportunities in both Europe and Asia

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