

Wireless Network Infrastructure Forecasts: 2016 – 2030 – Macrocell RAN, Small Cells, C-RAN, RRH, DAS, Carrier Wi-Fi, Mobile Core, Backhaul & Fronthaul

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Abstracts

The term “Wireless Network Infrastructure” has conventionally been associated with macrocell RAN (Radio Access Network) and mobile core segments of mobile operator networks. However, the scope of the term is expanding as mobile operators increase their investments in Heterogeneous Network or HetNet infrastructure such as small cells, carrier Wi-Fi and DAS (Distributed Antenna Systems), to cope with increasing capacity and coverage requirements.

In addition, mobile operators are keen to shift towards a C-RAN (Centralized RAN) architecture, which centralizes baseband functionality to be shared across a large number of distributed radio nodes. In comparison to standalone clusters of base stations, C-RAN provides significant performance and economic benefits such as baseband pooling, enhanced coordination between cells, virtualization, network extensibility and energy efficiency.

Due to a decline in macrocell RAN infrastructure spending, SNS Research estimates that the wireless network infrastructure market will remain relatively flat through 2020, with annual investments of over \$61 Billion. We also expect a significant shift in investments towards small cells, C-RAN, DAS and carrier Wi-Fi infrastructure. By 2020, these four submarkets, together with their fronthaul and backhaul segments, will account for over 50% of all wireless network infrastructure spending.

The “Wireless Network Infrastructure Forecasts: 2016 – 2030 – Macrocell RAN, Small Cells, C-RAN, RRH, DAS, Carrier Wi-Fi, Mobile Core, Backhaul & Fronthaul” datasheet presents comprehensive market size and forecast projections for wireless network infrastructure investments from 2016 till 2030, covering 9 individual submarkets and 6

regions. Historical figures are also presented for 2015, along with vendor market share data.

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FORECAST SEGMENTATION

Market forecasts are provided for each of the following submarkets and their subcategories:

MACROCELL RAN

AIR INTERFACE TECHNOLOGY SEGMENTATION

2G & 3G
LTE FDD
TD-LTE
WiMAX

MOBILE CORE

TECHNOLOGY SEGMENTATION

3G Packet Core
HLR (Home Location Register)
MSS (Mobile Switching Subsystem)
LTE EPC (Evolved Packet Core)
WiMAX Mobile Core
5G Mobile Core

MACROCELL BACKHAUL

TECHNOLOGY SEGMENTATION

Ethernet
Microwave & Millimeter Wave
Satellite
WDM (Wavelength Division Multiplexing)
PON (Passive Optical Network)
Others

SMALL CELLS

AIR INTERFACE TECHNOLOGY SEGMENTATION

2G & 3G

LTE

5G

DEPLOYMENT MODEL SEGMENTATION

Indoor

Outdoor

USE CASE SEGMENTATION

Residential

Enterprise

Urban

Rural & Suburban

CELL SIZE SEGMENTATION

Femtocells

Picocells

Microcells

SMALL CELL BACKHAUL

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Millimeter Wave

Satellite

Fiber & Others

CARRIER WI-FI

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Access Point Controllers

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Managed Wi-Fi Offload

C-RAN

AIR INTERFACE TECHNOLOGY SEGMENTATION

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5G

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Outdoor

SUBMARKET SEGMENTATION

BBUs (Baseband Units)

RRHs (Remote Radio Heads)

C-RAN FRONTHAUL

TECHNOLOGY SEGMENTATION

Dedicated Fiber

WDM

OTN (Optical Transport Network)

PON

Ethernet

Microwave

Millimeter Wave

DAS

DEPLOYMENT MODEL SEGMENTATION

Indoor

Outdoor

REGIONAL MARKETS

Asia Pacific

Eastern Europe

Latin & Central America

Middle East & Africa

North America

Western Europe

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