



Radio access networks: worldwide forecast 2020– 2028



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About this report

This report provides forecasts for addressable revenue for vendors in the radio access network (RAN) sector for 2020–2028. It provides details on MNO spending by site type, RAN architecture and region, and also gives a break down of spending based on major drivers of change, such as 5G expansions and upgrades and the adoption of virtualised RAN. The report provides recommendations for vendors and MNOs.

The report is based on several sources, including:

- Analysys Mason’s survey of 86 MNOs about their RAN investment plans
- interviews with MNOs and vendors worldwide.

KEY QUESTIONS ANSWERED IN THIS REPORT

- What are the key trends and factors that will affect the RAN market during 2020–2028?
- Which will be the key areas of new revenue, and how will emerging technologies such as massive MIMO and Open RAN perform?
- What ecosystem changes will result from the adoption of new architecture?
- How far will 5G standalone drive new investments and approaches?
- Which regional factors will drive growth?
- What should vendors do to exploit new business opportunities?



GEOGRAPHICAL COVERAGE

- Worldwide
- Central and Eastern Europe
- Developed Asia–Pacific
- Emerging Asia–Pacific
- Latin America
- Middle East and North Africa
- North America
- Sub-Saharan Africa
- Western Europe

COVERAGE

- Site type: macro, micro and small cell
- Architecture: integrated, centralised, virtualised and Open RAN
- Network: 5G and non-5G
- Product type: antennas, basebands, xNFs and cloud infrastructure
- Professional services



WHO SHOULD READ THIS REPORT

- RAN vendor strategy and planning teams.
- Product management teams that are responsible for feature functionality and geographical focus, and product marketing teams that are responsible for revenue growth.
- Strategy teams and CTO office within MNOs, to understand trends that will affect their procurement strategies and architecture.
- Investors in mobile network start-ups or operators.
- Vendors that are looking to enter the RAN market for the first time, including start-ups.



Executive summary and recommendations

Forecast

Overall telecoms market context

Market definition

About the authors and Analysys Mason

Our research services



Consumer Services

- Fixed Broadband Services
- Mobile Services
- Fixed-Mobile Convergence
- Smart Devices
- Future Comms
- Video, Gaming and Entertainment
- Digital Services



Networks

- Next-Generation Wireless Networks
- Wireless Infrastructure Strategies
- Fibre Infrastructure Strategies
- Operator Investment Strategies
- Telecoms Strategy and Forecast
- Transport Network Strategies



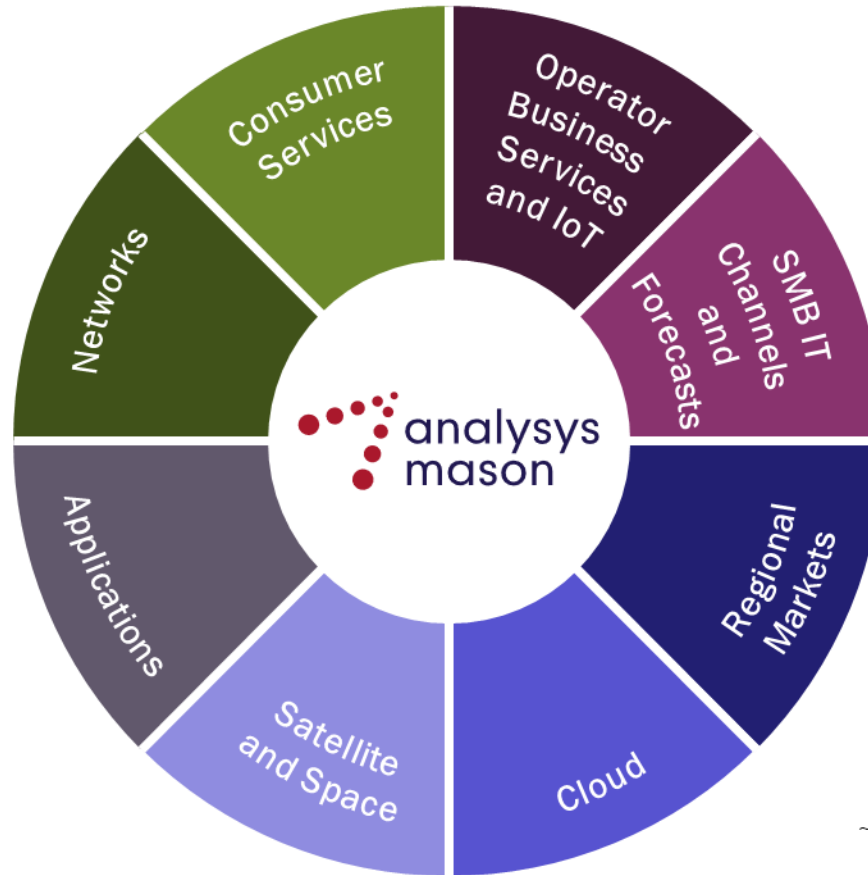
Applications

- Network Automation and Orchestration
- Customer Engagement
- Monetisation Platforms
- Digital Experience
- Automated Assurance
- Service Design and Orchestration
- Telecoms Software Market Shares



Satellite and Space

- Satellite Communications
- Space Applications and Infrastructure



Operator Business Services and IoT

- Enterprise Services
- SME Services
- IoT Services
- Private Networks



SMB IT Channels and Forecasts

- Cyber Security
- SMB Technology Forecaster



Regional Markets

- Global Telecoms Data and Financial KPIs
- Americas
- Asia-Pacific
- Middle East and Africa
- European Core Forecasts
- European Telecoms Market Matrix
- European Country Reports



Cloud

- Cloud Infrastructure Strategies
- Data, AI and Development Platforms
- Edge and Media Platforms
- Multi-Cloud Networking



DataHub

- ~2800 forecast and 280+ historical metrics
- Regional results and worldwide totals
- Operator historical data



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