



Private LTE/5G networks: worldwide trends and forecasts 2022–2027



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About this report

This report provides a forecast on the number of private LTE/5G networks that will be deployed between 2022 and 2027 and the corresponding spend (capex and opex) on those networks. It provides a breakdown and analysis of trends by industry sector and by region.

The report is based on several sources, including:

- interviews with operators, vendors and systems integrators
- interviews with end users
- Analysys Mason reports on the private LTE/5G network opportunity and research on mobile capex and opex.¹

WHO SHOULD READ THIS REPORT

This report addresses the requirements of executives that are assessing the demand for private LTE/5G networks. These executives include:

- senior executives of enterprise and IoT business units
- senior executives responsible for R&D and network innovation
- market analysts responsible for market sizing.

The report addresses suppliers of private networks such as telecoms operators, network equipment providers, public cloud providers and systems integrators.



GEOGRAPHICAL COVERAGE

Region modelled

- Central and Eastern Europe (CEE)
- Developed Asia-Pacific (DVAP)
- Emerging Asia-Pacific (EMAP)
- Latin America (LATAM)
- Middle East and North Africa (MENA)
- North America (NA)
- Sub-Saharan Africa (SSA)
- Western Europe (WE)



KEY METRICS

Number of networks

Capex forecast

Opex forecast

Breakdown by LTE and 5G

Number of networks and spend (capex and opex) by sector:

- Manufacturing
- Transport
- Mining, oil and gas
- Utilities
- Public sector
- Entertainment and retail
- Healthcare

¹ For more information, see Analysys Mason's *Private LTE/5G networks tracker, Telecoms capex: worldwide trends and forecasts 2017–2027* and *Telecoms opex: worldwide trends and forecast 2020–2027*. This document is for Analysys Mason's subscription service customers only. Usage is subject to the terms and conditions in our copyright notice.



Worldwide trends

Sector trends

Forecast methodology and assumptions

About the authors and Analysys Mason

About the authors



Ibraheem Kasujee (Analyst) is a member of the *Operator Business Services and IoT* research team in London, and contributes to the *IoT Services* and *Private Networks* research programmes. He has written on topics including private LTE/5G networks, IoT eSIMs and iSIMs and LPWA networks, and has conducted research on IoT verticals such as smart metering and smart buildings. Ibraheem holds a BSc in economics from the University of Warwick, and wrote his dissertation on the impact of technology on sleep.



Michele Mackenzie (Principal Analyst) is the lead analyst for Analysys Mason's *IoT Services* and *Private Networks* research programmes. She has over 20 years of experience as an analyst and conducts research on the B2B IoT market including benchmarks of operator and MVNO strategies. She has produced research and analysis on the role of IoT in industries such as utilities, automotive, healthcare and manufacturing and the role of technologies, such as 5G and cloud computing, in IoT, and on the competitive landscape of the private networks market including operators, network equipment providers and hyperscalers. She has also analysed the different network deployment models and is responsible for the forecast of network spend on private LTE/5G.

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Our research programmes

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Consumer Services programmes
 - Fixed Broadband Services
 - Mobile Services
 - Fixed-Mobile Convergence
 - Smart Devices
 - Future Comms
 - Video, Gaming and Entertainment
 - Digital Services
- 
Networks programmes
 - Next-Generation Wireless Networks
 - Wireless Infrastructure Strategies
 - Fibre Infrastructure Strategies
 - Operator Investment Strategies
 - Telecoms Strategy and Forecast
- 
Applications programmes
 - Network Automation and Orchestration
 - Customer Engagement
 - Monetisation Platforms
 - Digital Experience
 - Automated Assurance
 - Service Design and Orchestration
 - Telecoms Software Market Shares
- 
Cloud programmes
 - Cloud Infrastructure Strategies
 - Data, AI and Development Platforms
 - Edge and Media Platforms



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Operator Business Services and IoT programmes
 - Enterprise Services
 - SME Services
 - IoT Services
 - Private Networks
- 
SMB IT Channels and Forecasts programmes
 - Cyber Security
- 
Regional Markets programmes
 - Global Telecoms Data and Financial KPIs
 - Americas
 - Asia-Pacific
 - Middle East and Africa
 - European Core Forecasts
 - European Telecoms Market Matrix
 - European Country Reports
- 
DataHub
 - ~2800 forecast and 280+ historical metrics
 - Regional results and worldwide totals
 - Operator historical data

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Our areas of expertise



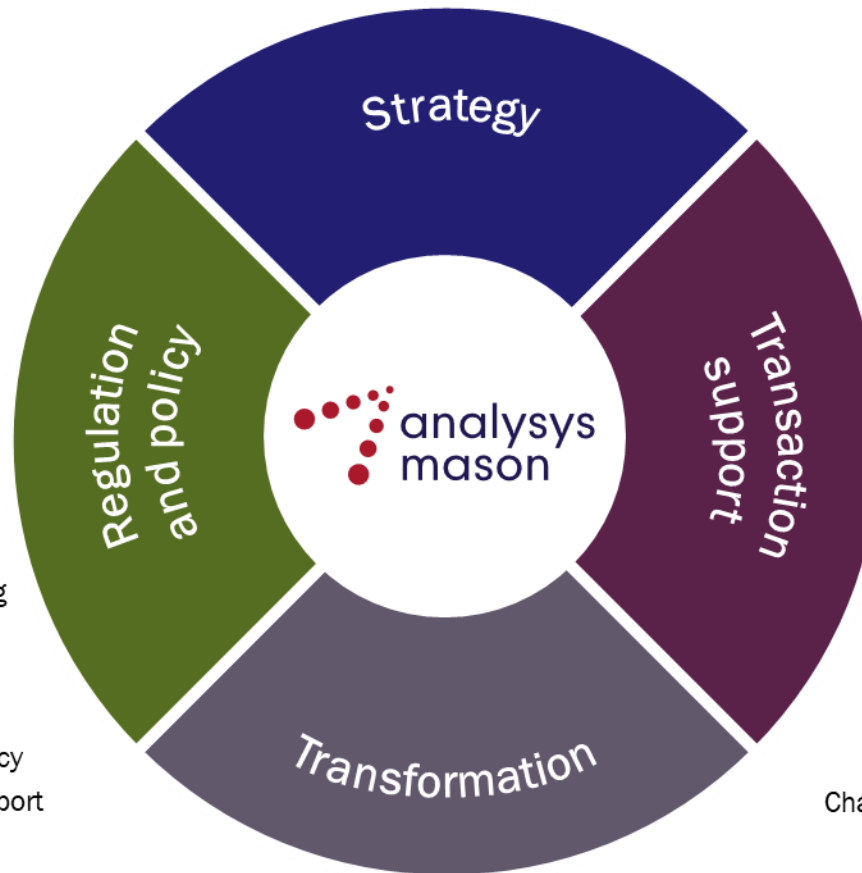
Strategy

- Corporate growth strategy
- Business unit strategy
- Infrastructure strategy



Regulation and policy

- Network and platform
- Public sector broadband intervention
- Accelerating digital transformation of society
- Price controls and cost modelling
- Regulatory accounting
- Regulatory benchmarking and analysis
- Spectrum management and policy
- Expert witness and litigation support
- Postal regulation and policy



Transaction support



- Commercial due diligence and market review
- Technical due diligence
- Post-merger integration
- Periodical business monitoring and loan technical advisory
- Opportunity scouting and pre-deal support



Transformation

- Business transformation
- Digitalisation
- Operational excellence
- Data, BI, steering and insights
- Change and programme management
- Sustainability

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