

Small cell industry market status and forecast 2022

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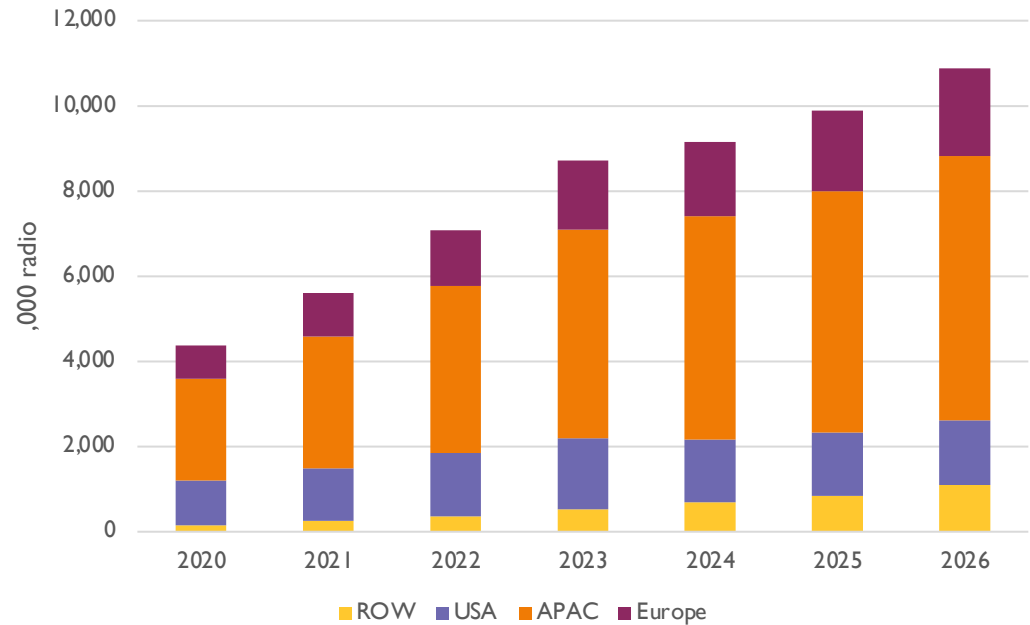


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Small cells are driving innovation in five areas that are essential to the next phase of 5G

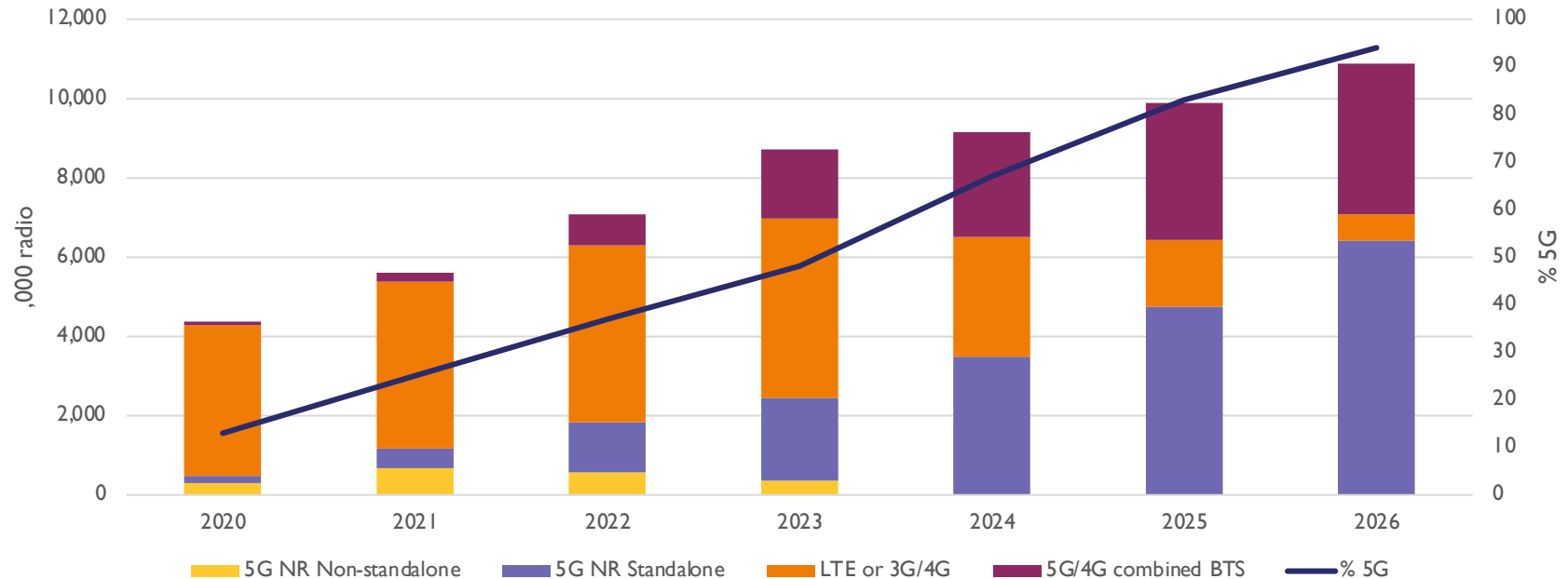


- Diversity of use cases and SA-enabled capabilities
- Diversity of operating models
- Architecture evolution
- Open standards and common foundations
- Diversity of spectrum and regulation



Cumulative deployment of small cell and DAS radio units by region 2020-2026 Source: SCF

5G is emerging from its 4G+ phase and driving change in the industry's structure and requirements

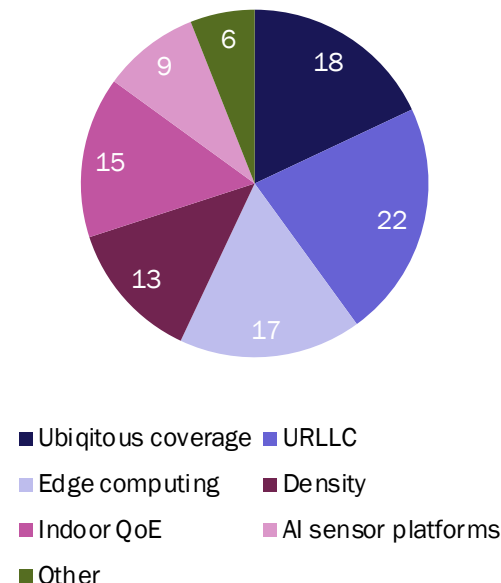


Cumulative deployment of small cell radio units 2020-2026 by radio technology Source: SCF



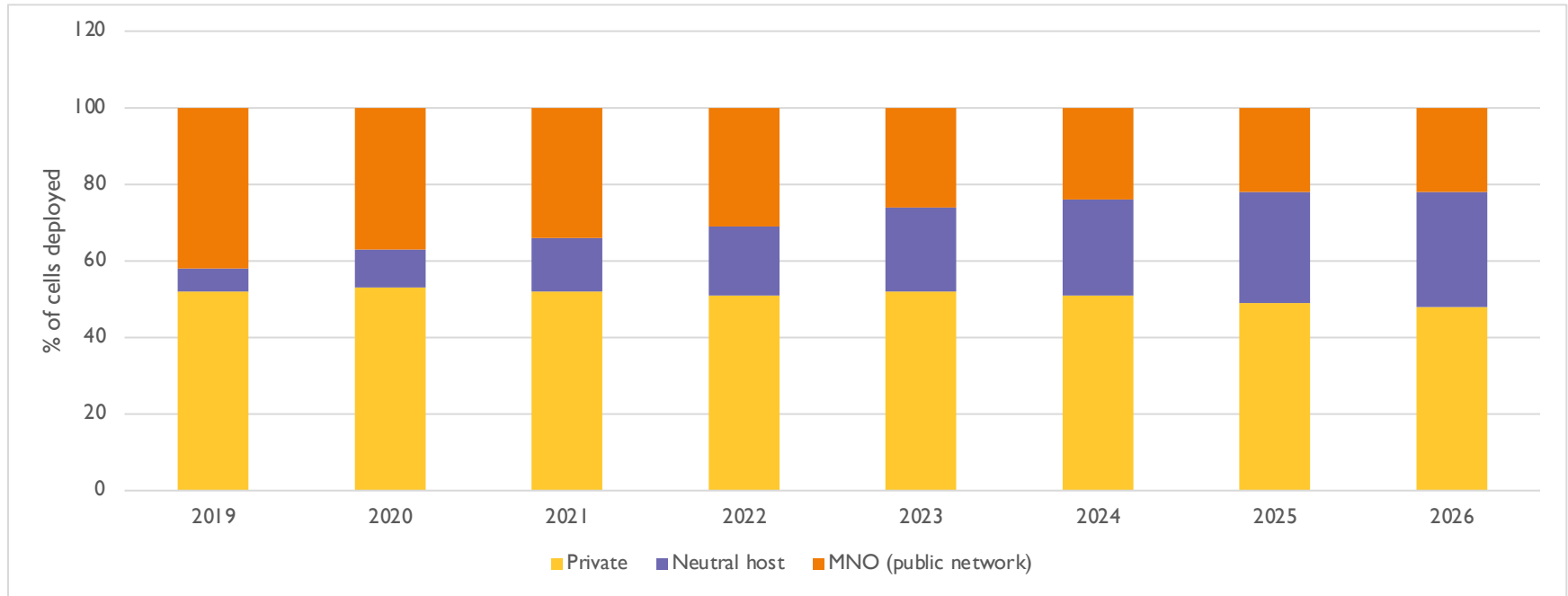
Enterprise and B2B2C use cases rely on a growing diversity of capabilities

- Operators are starting to migrate to 5G SA, vRAN and mission critical networks
- Justified by business critical use cases e.g. in manufacturing, transport, venues
- Architectural change will not be sufficient on its own. Diversity of deployment and monetization models is required
- Enabled by progressive policies in spectrum, siting and network sharing
- Open platforms at all layers will have a key role



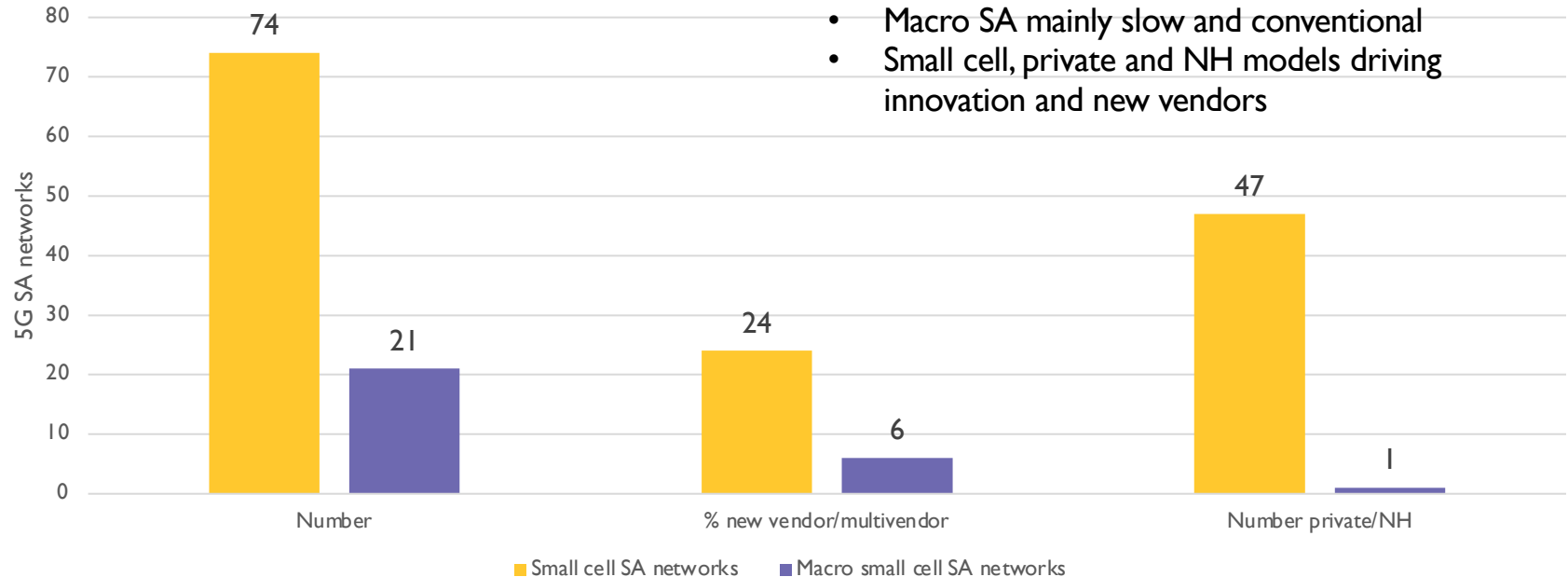
Leading connectivity requirement for key commercial use cases – survey of 46 enterprise deployers. Source: SCF

That, in turn, will encourage diversification of deployment models



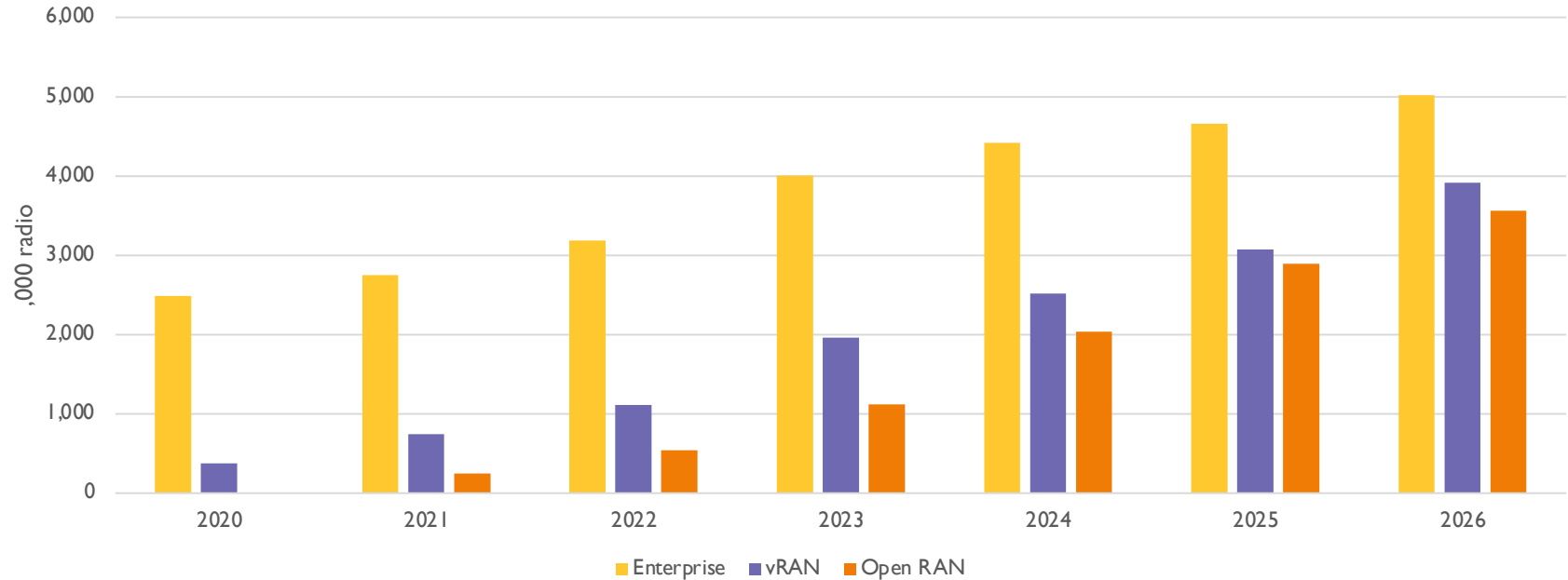
Deployment of enterprise and private small cells by business model. Source: SCF

Enterprise is driving innovation in 5G SA models and ecosystems, led by small cells



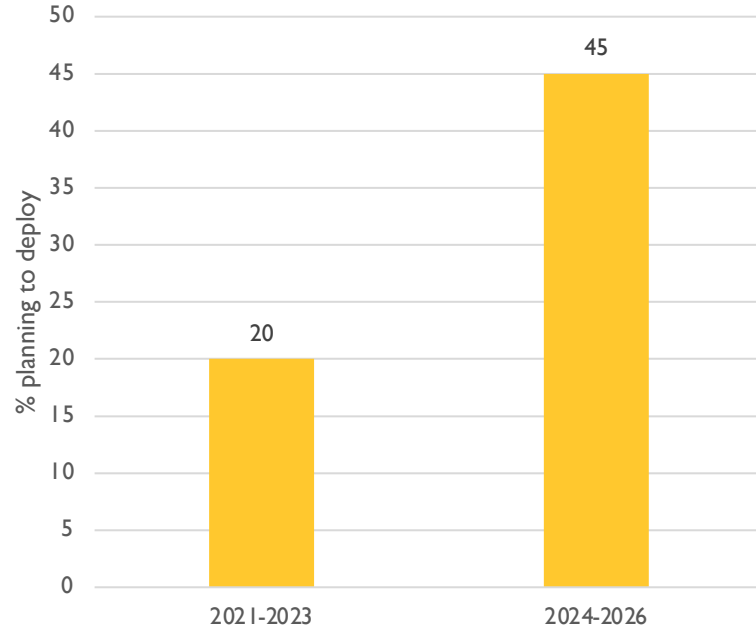
5G SA networks deployed at scale May 2022, by vendor and deployer model. Source: SCF

Architectural change will be important to improve agility and scale

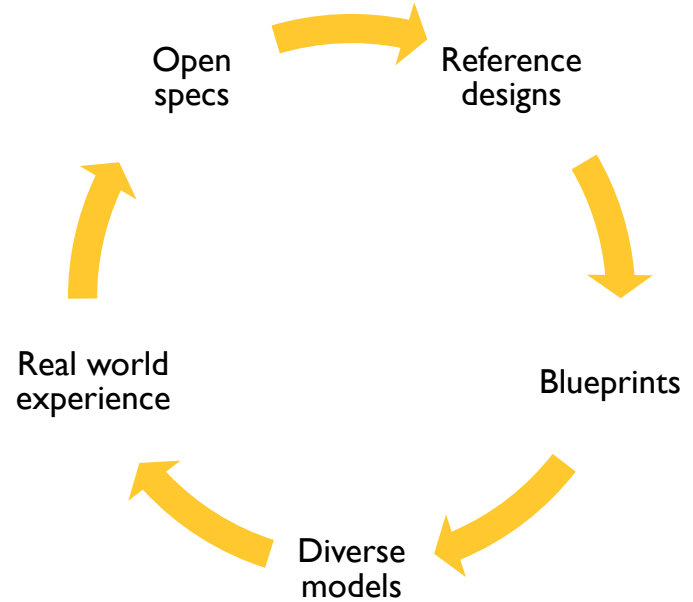


Enterprise small cells, total with vRAN and Open RAN subsets. Source: SCF

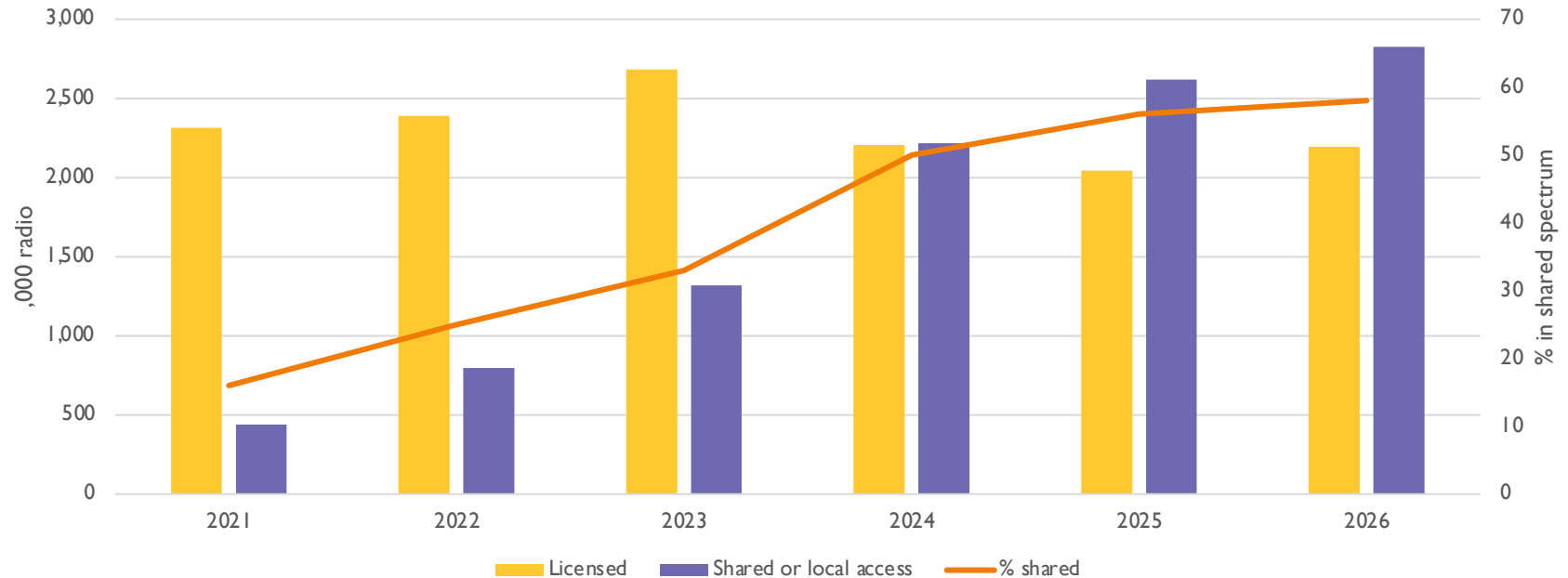
Common and open foundations are essential to avoid 5G fragmentation



L: % of operators expecting to deploy Split 6 by 2026. Source: SCF

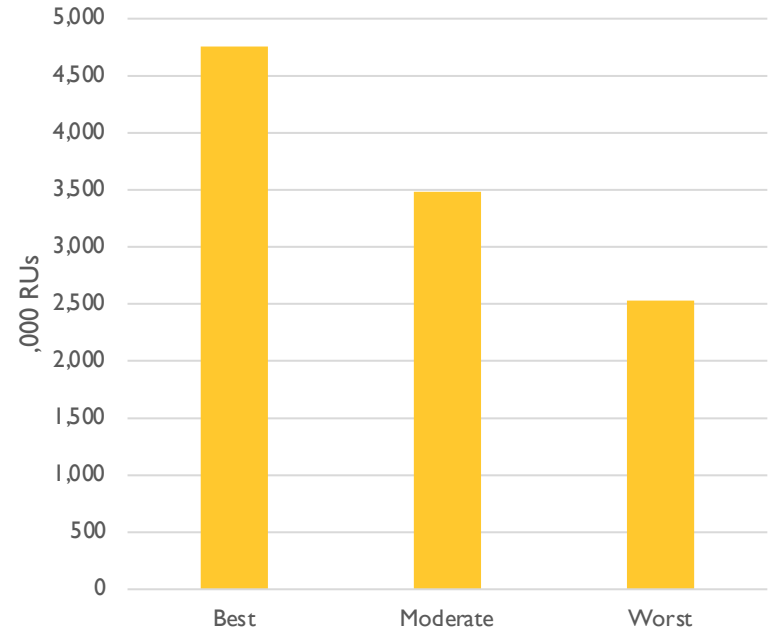
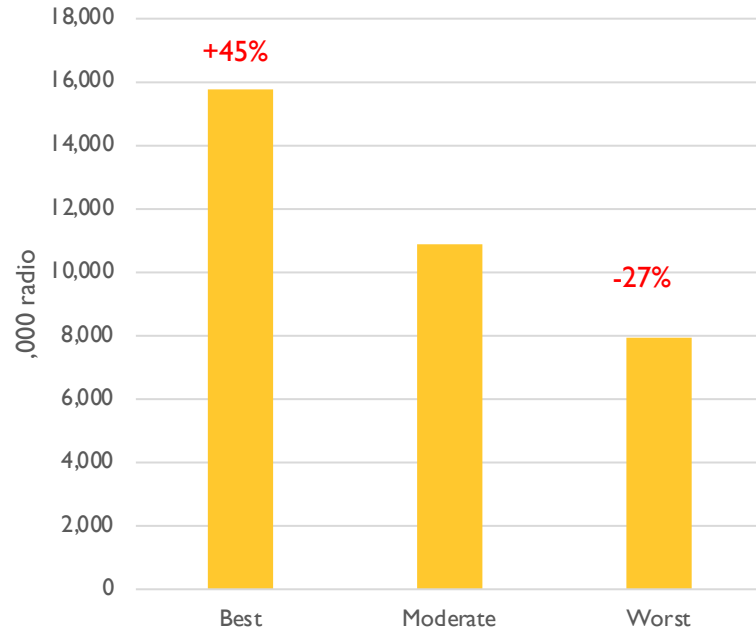


Innovation in spectrum licensing will be a key enabler of diversity



Enterprise small cell deployments by spectrum type Source: SCF

Considerable upside can be achieved when there is cross-industry cooperation focused on business models



(L) Cumulative deployments of small cells (all types) 2020-2026, best and worst case; (R) Cumulative deployment of neutral host small cells 2020-2026, best and worst case. Source: SCF/Rethink forecast 2022



Questions?