

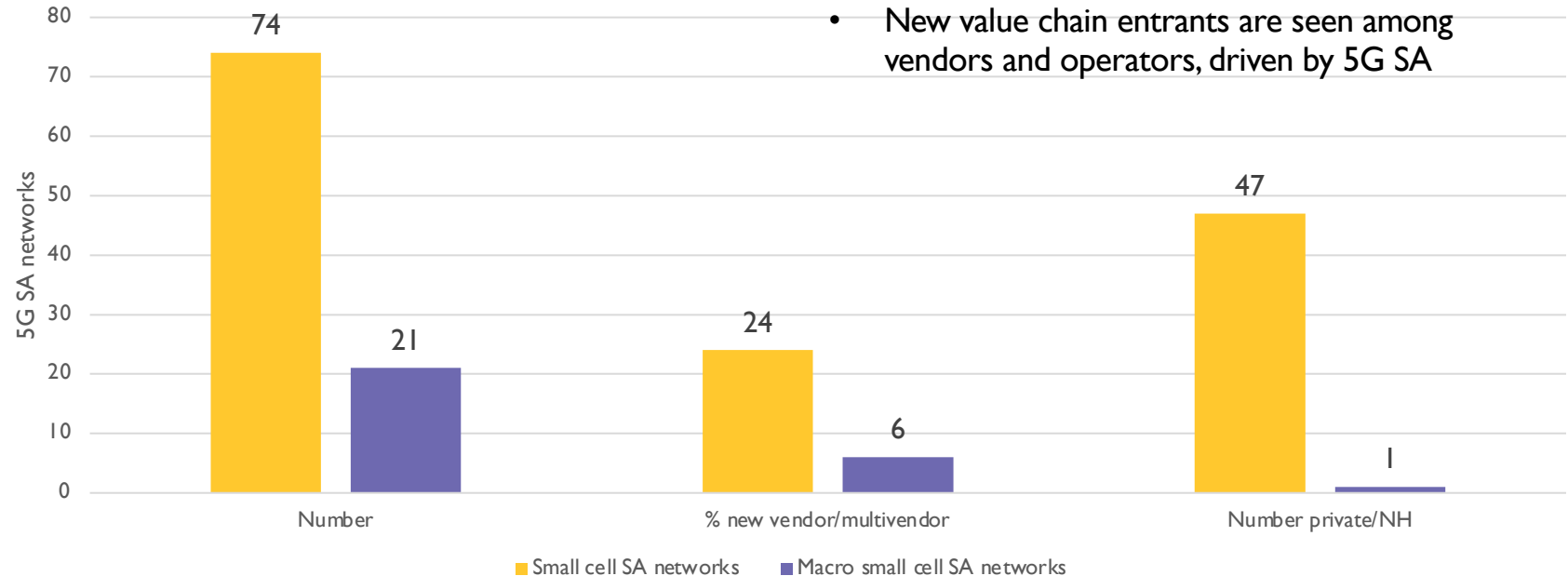
Open RAN market overview - opportunities and challenges

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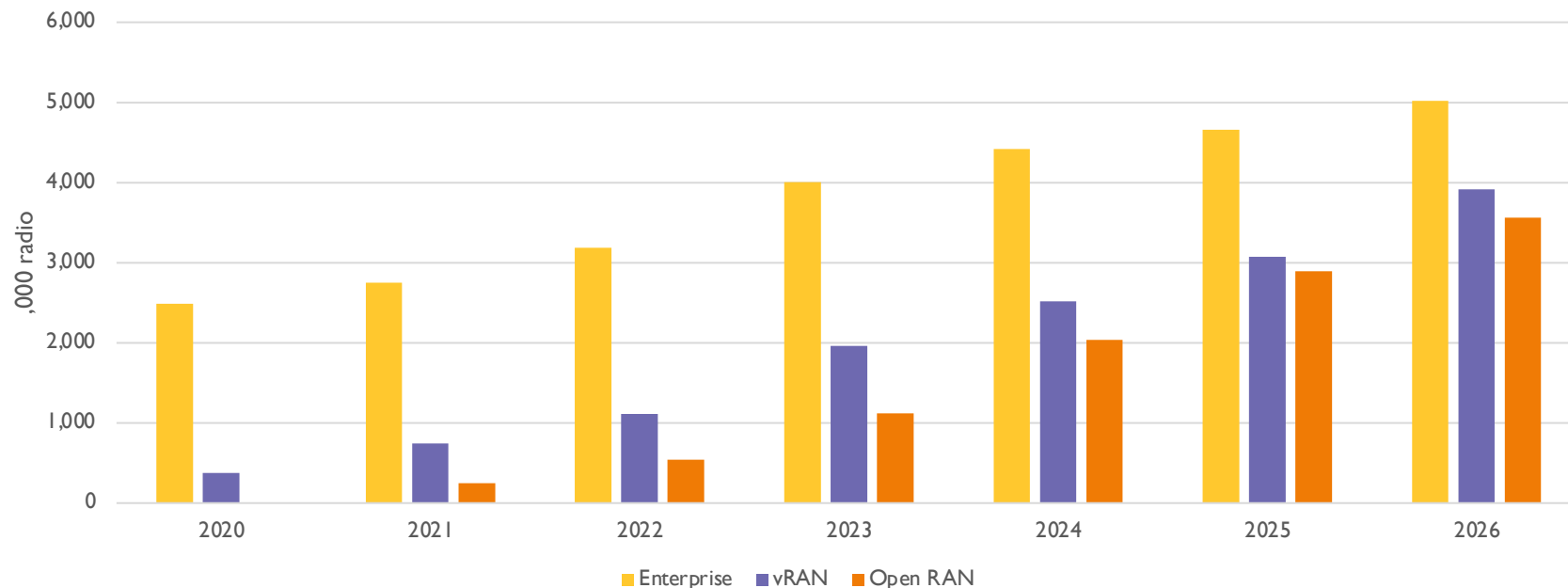
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5G small cell requirements are best met with a wide ecosystem of vendors and operators



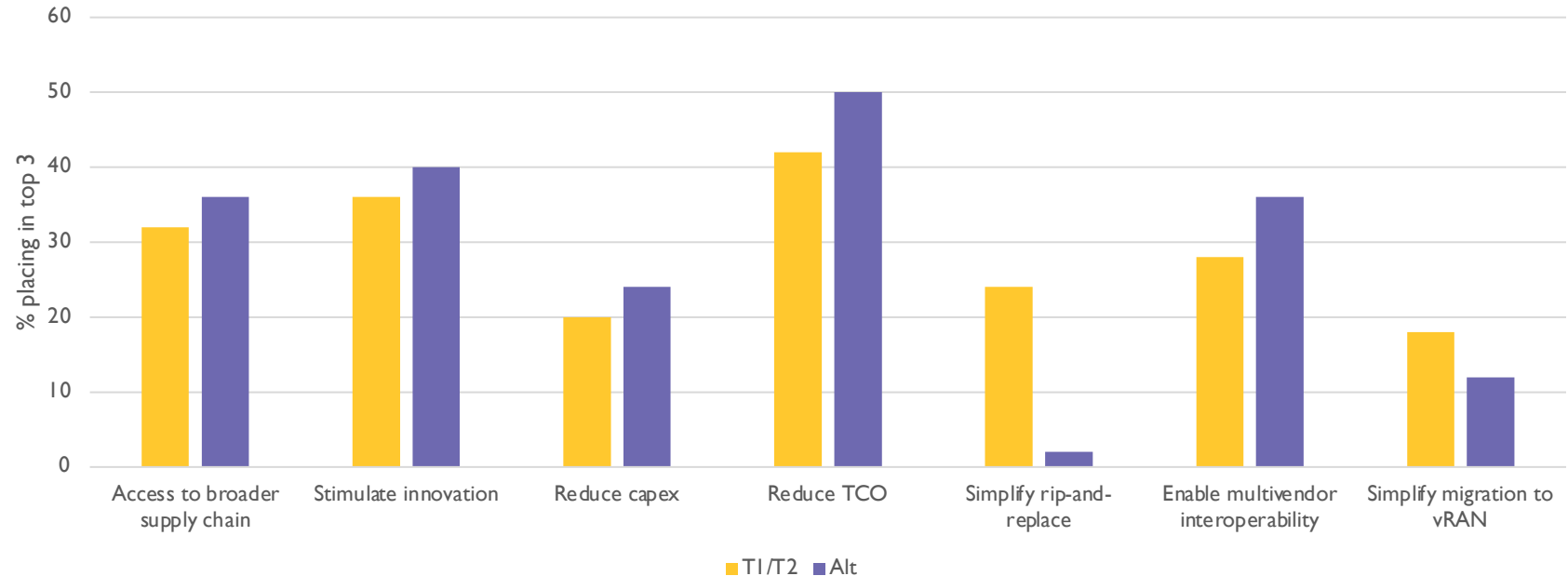
5G SA networks deployed at scale May 2022, by vendor and deployer model. Source: SCF

There is rising interest in open and disaggregated architectures, and many deployments driven by small cells



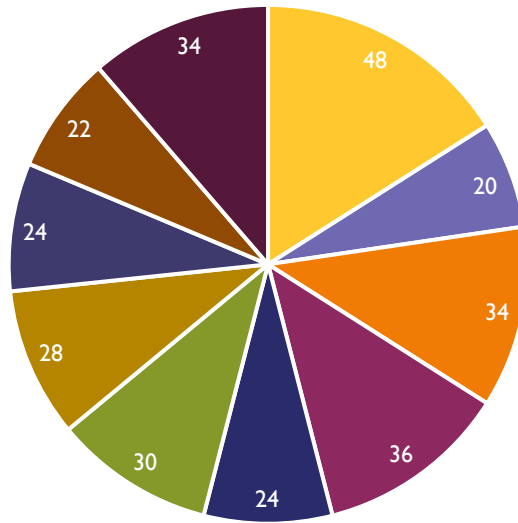
Enterprise small cells, total with vRAN and Open RAN subsets. Source: SCF

Deployers have real drivers to adopt a more open RAN architecture



Top three drivers to deploy small cell open RAN. Source: SCF

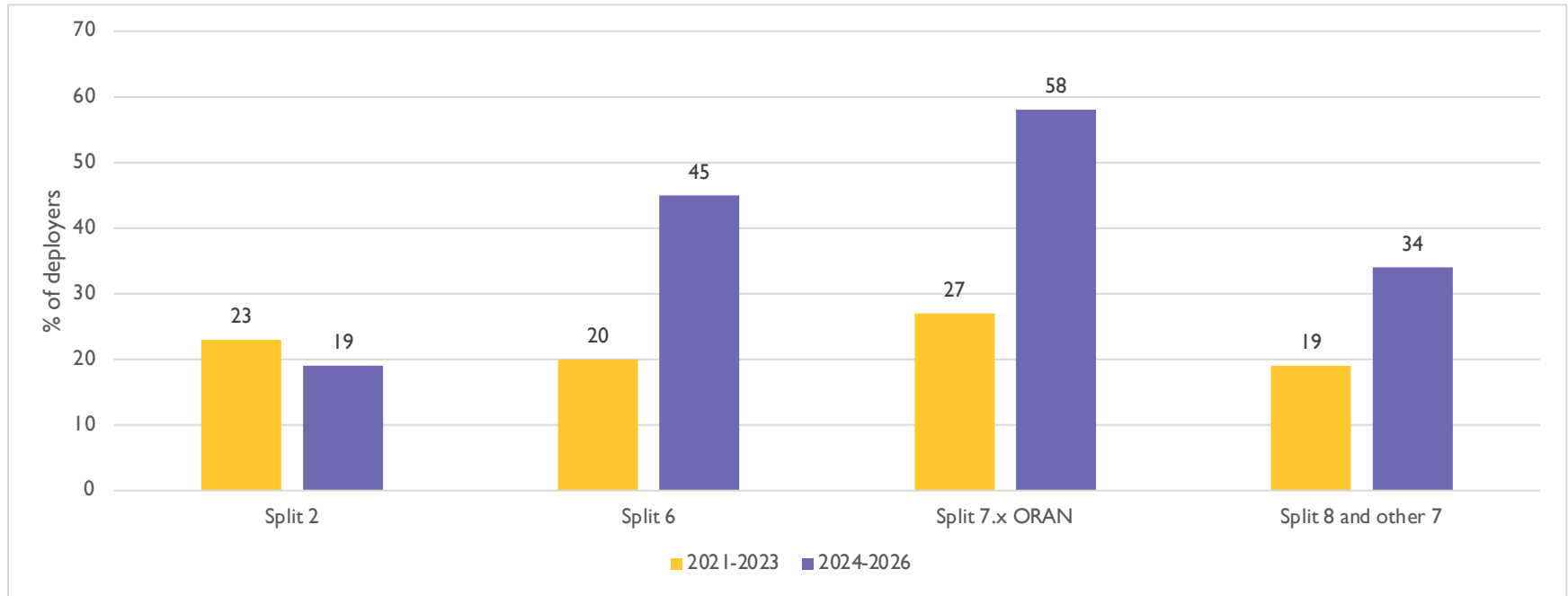
However, the industry has barriers to address in order to drive scale



- Integration cost and complexity
- Long time to deploy
- Performance trade-offs compared to integrated RAN
- Immature technologies and supply chain
- Risk of increased TCO
- Lack of scale in ecosystem
- Limited trials or PoC in demanding use cases (e.g. ultra-low latency)
- Security issues
- Lack of single accountable supplier

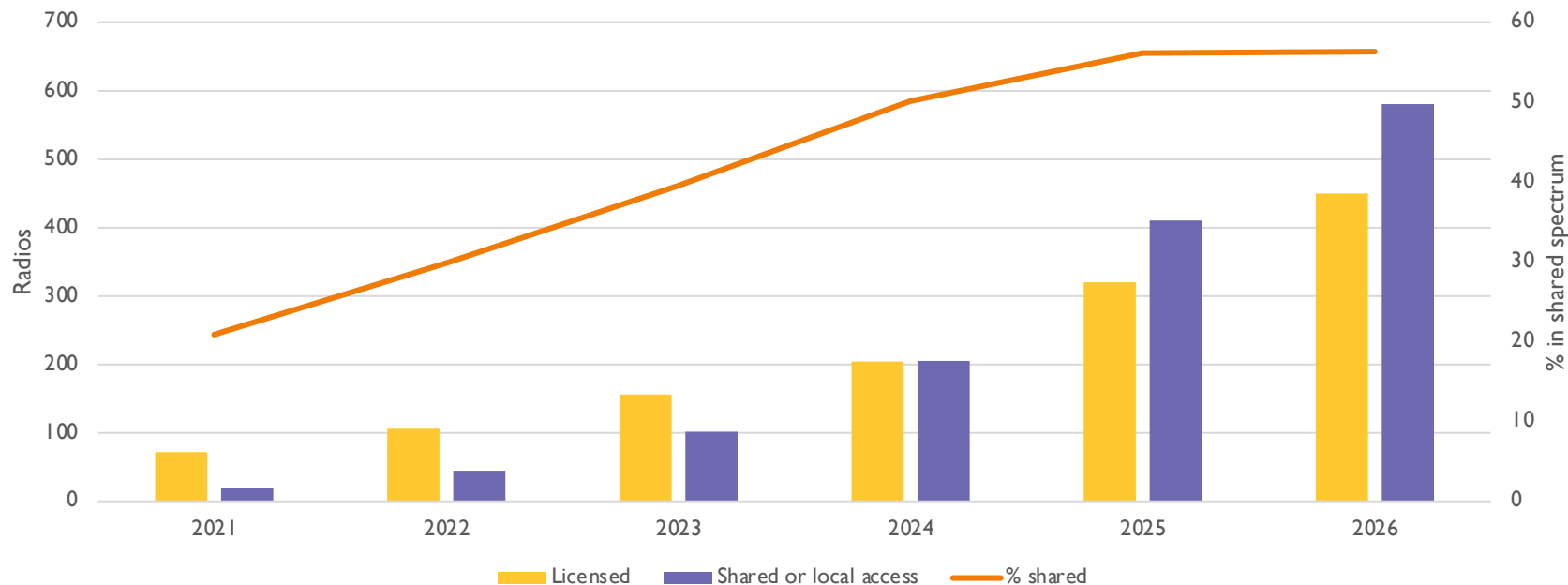
Top 3 barriers to deploy small cell Open RAN. Source: SCF

No single architecture meets all needs, and each one has benefits and trade-offs



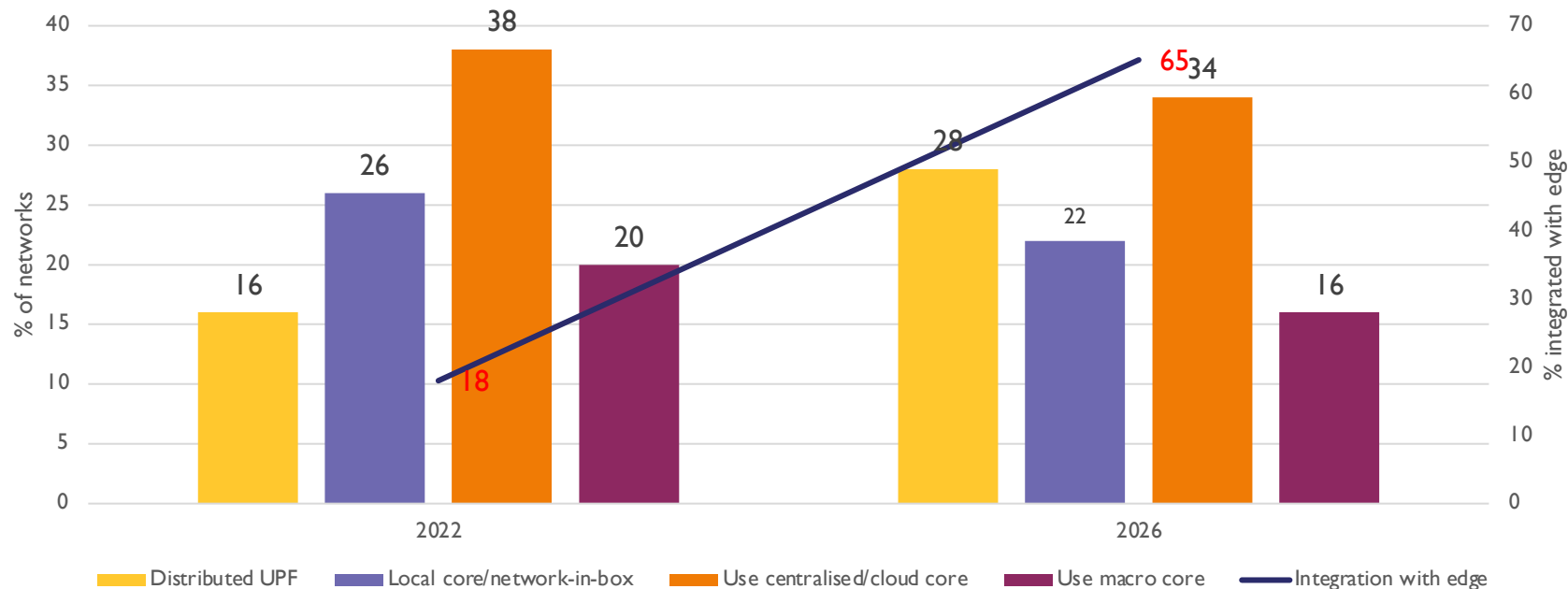
Expected support for functional splits, all RANs and deployers, 2021-2026 Source: SCF

Open networks are closely tied to availability of flexible spectrum



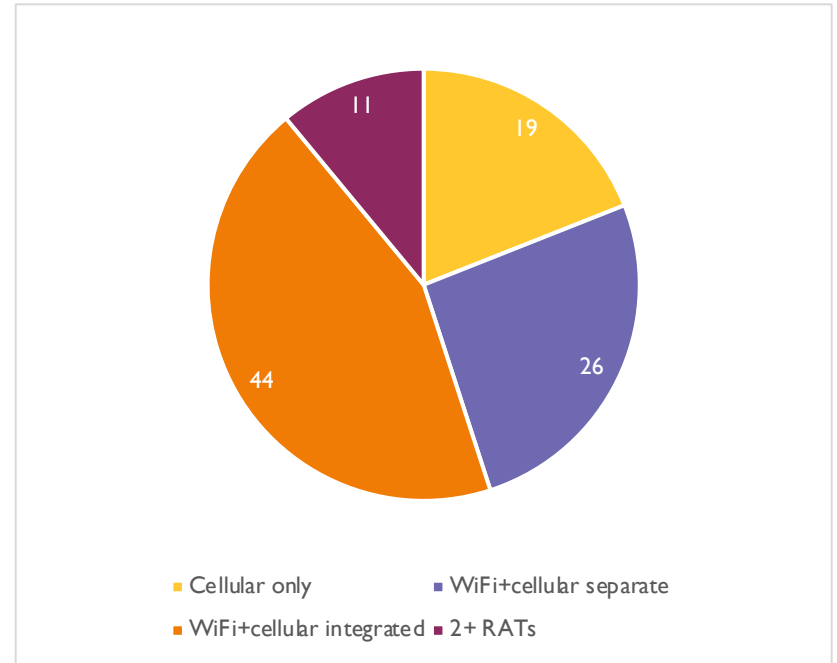
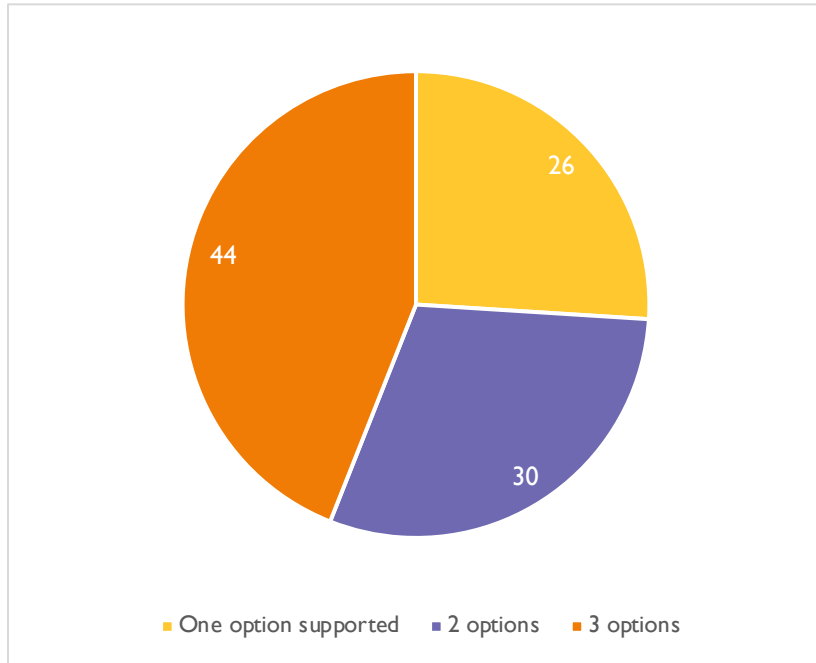
Enterprise small cell deployments by spectrum type Source: SCF

It's not just the RAN – core architectures are evolving, with potential for new vendors



5G SA enterprise small cell networks by core architecture

Common foundations are essential, but they must not provide a straitjacket at this early stage in 5G



L: Number of functional splits supported 2026; R: Combination of enterprise RATs supported 2026. Source: SCF



Questions?