



3Q20 Wireless Infrastructure – November 2020

Quarterly Update – 2G/3G/4G/5G Radio Access & Core Networks



Table of Contents

3Q20 WIRELESS INFRASTRUCTURE – NOVEMBER 2020	1
QUARTERLY UPDATE – 2G/3G/4G/5G RADIO ACCESS & CORE NETWORKS.....	1
TABLE OF CONTENTS.....	2
ABSTRACT	3
KEY TAKEAWAYS	4
IN 3Q20, CHINA AGAIN SKEWED THE WIRELESS INFRASTRUCTURE MARKET, WHICH WAS UP 19% YOY BUT DOWN 12% SEQUENTIALLY	6
STRONG AND BUMPY CHINA ALTERS THE 3Q20 5G SALES PICTURE	6
COVID-19 CONTINUED TO AFFECT PARTS OF EUROPE, AFRICA, AND LATIN AMERICA.....	7
5G REMAINS THE BRIGHT SPOT AND AS OF MID NOVEMBER, THE NUMBER OF 5G COMMERCIAL NETWORKS HIT 125	7
DUE TO THE SALES SLOWDOWN IN CHINA, HUAWEI AND ZTE LOST MARKET SHARES	8
IN CORE NETWORKS, ALMOST ALL 5G CORE SALES CAME FROM CHINA IN 3Q20.....	10
<i>In 4G, EPC remains lumpy, and virtual EPC grows 1% QoQ and 61% YoY.....</i>	<i>11</i>
<i>Mavenir had a strong vEPC 3Q20 and challenged the major league</i>	<i>11</i>
AS COVID-19 SURGES, 4Q20 OUTLOOK REMAINS CLOUDY BUT THE PAST 2 QS HAVE SHOWED RESILIENCE AND BUMPED OUR FORECAST.....	13
OUR UPDATED 2020 FORECAST IS NOW 3.9% ABOVE OUR PREVIOUS ONE	13
OUR REVISED LONG-TERM WIRELESS INFRASTRUCTURE MARKET FORECAST PEAKS IN 2022.....	14
5G SALES ARE ON TRACK TO SURPASS THAT OF 4G BY YEAREND	14
<i>The outcome of the US presidential election will have no impact on our updated forecast.....</i>	<i>15</i>
<i>And regardless of the incoming administration, Open RAN will continue its ascension.....</i>	<i>15</i>
HOME TO THE WORLD’S LARGEST WIRELESS NETWORK FOOTPRINTS, ASIA PACIFIC WILL REMAIN THE LARGEST MARKET	16
NORTH AMERICA WILL REMAIN THE WORLD’S SECOND LARGEST WIRELESS INFRASTRUCTURE MARKET AFTER ASIA PACIFIC	18
EMEA WILL SLOWLY CRAWL BACK TO MODERATE GROWTH.....	18
...So Will CALA	19

Abstract

This report analyzes the 3Q20 wireless infrastructure market worldwide and covers 2G, 3G, 4G and 5G radio access network (RAN) and core network nodes. It presents historical data from 2016 to 2019, quarterly market size and vendor market shares, and a detailed market forecast through 2025 for 2G/3G/4G/5G RAN, including open vRAN and open RAN, and core networks (e.g., EPC, vEPC and 5GC), in over 10 product categories for each region (e.g., North America, Europe, Middle East Africa, Asia Pacific, Caribbean Latin America). The historical data accounts for sales of more than 30 wireless infrastructure vendors, including a few vendors that shared confidential sales data with LightCounting. The market forecast is based on a model correlating wireless infrastructure vendor sales with 20 years of service provider network rollout patterns analysis, and upgrades and expansion plans.