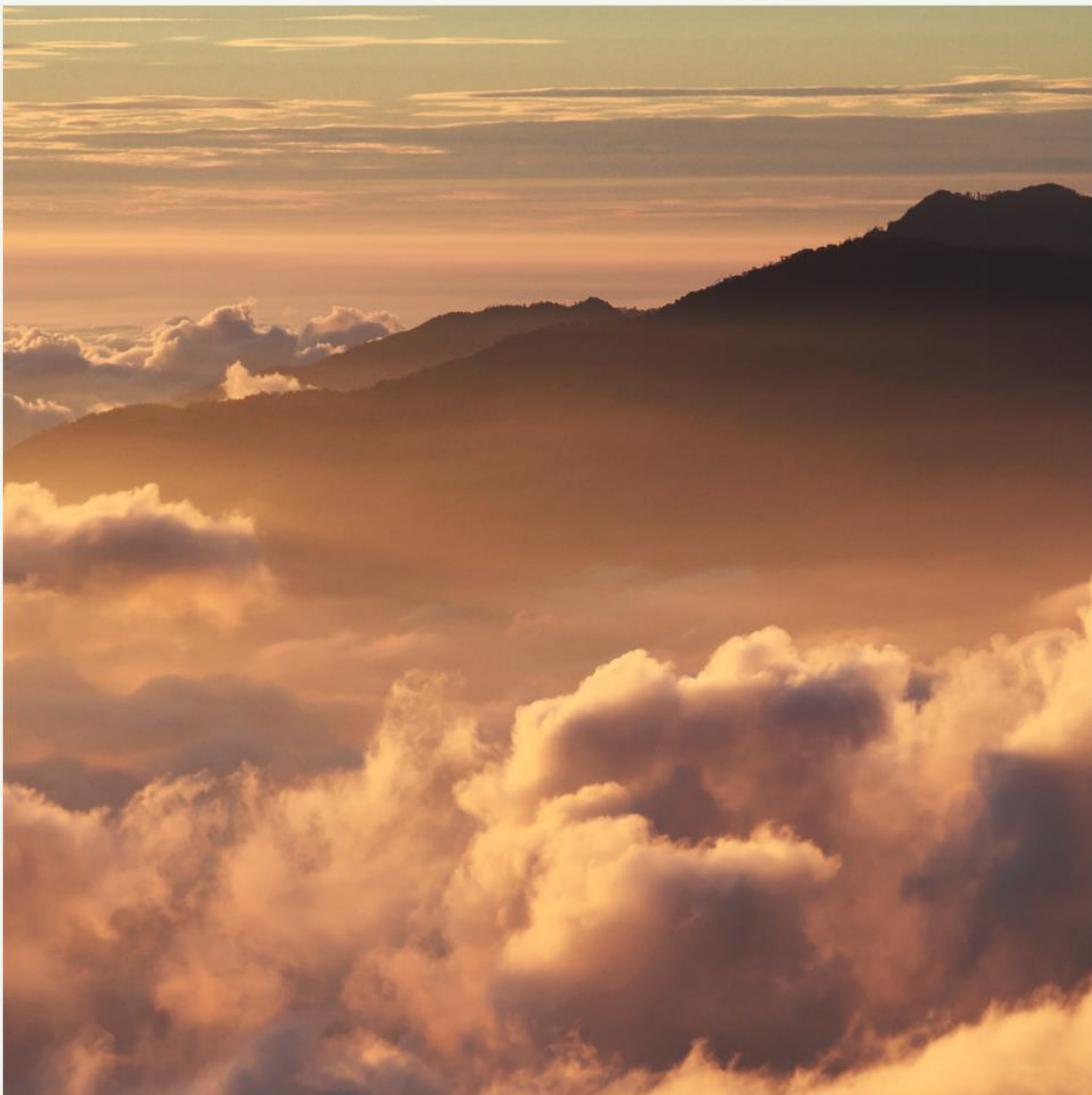


Virtual RAN 2024



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New in this year's report:

- Analysis of the AT&T / Ericsson deal and what it means for vRAN
- Fresh forecasts of vRAN adoption through 2032
- Operational efficiency and its role in vRAN adoption
- Life cycle cost analysis including anticipated 6G deployment

Abstract: A forecast for virtual radio access networks (vRAN) capacity, vDU and vCU instances, and software revenue for 4G, 5G, and 6G. The 2022-2032 forecast focuses on how vRAN will be adopted into the next major deployment cycle. Cost analysis compares the impact of centralization, virtualization, and openness. The report also breaks down the trends to virtualization in multiple ways to illustrate the key market segments.

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METHODOLOGY

For this report, Mobile Experts conducted a survey of more than 20 software suppliers, mobile operators, OEMs, and other stakeholders in the market. The short-term baseline forecast is based on the direct inputs from suppliers of virtual RAN software in commercial networks today, and from the top 30 operators worldwide which we consider to be candidates as vRAN customers.

Mobile Experts also used guidance from mobile operators and examples of recent major contracts, for pricing of vRAN solutions at a system level. Our database of radio hardware shipments is used to calculate the value of the hardware, isolating the value of the software represented in recent major contracts. Feedback on pricing for RAN capacity in India played a major role in our conclusions about comparative cost between dedicated RAN and vRAN as one example.

Future projections for vRAN are based on wider discussions with operators and the cost analysis that indicates real savings in the long-term life cycle of the 5G network. Market drivers and market challenges were assessed and both operators and suppliers were asked directly to gauge the impact of each factor.