



1Q21 WIRELESS INFRASTRUCTURE – MAY 2021

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



Table of Contents

ABSTRACT	3
KEY TAKEAWAYS	4
LIKE 4Q20 AND FY20, 1Q21 WAS ALSO EPIC AND DEFIED ALL ODDS IN A PANDEMIC	5
5G REMAINS THE BRIGHT SPOT AND AS OF MID-APRIL 2021, THE NUMBER OF 5G COMMERCIAL NETWORKS HIT 163.....	6
<i>The potential for LTE-A and VoLTE upgrades looks phenomenal.....</i>	6
<i>The need for IMS has never been greater.....</i>	6
<i>The need for EPC is vanishing</i>	7
STRONG CHINA 5G ROLLOUTS KEPT HUAWEI AND ZTE ON THE LEADERSHIP BOARD, NOKIA AND SAMSUNG GAINED SHARES.....	7
<i>In Scandinavia, the Baltics and the Balkans, Ericsson took its former footprints back from Huawei</i>	8
IN CORE NETWORKS, THE BULK OF 5G CORE SALES CAME FROM CHINA IN 1Q21: HUAWEI AND ZTE COMBINED COMMAND	
62% MARKET SHARE	10
<i>in 4G core, Ericsson kept the lead it took in 4Q20.....</i>	11
<i>Gaining or keeping market share in the EPC/vEPC market is a tough balancing act.....</i>	11
2021 IS A RETURN TO NORMALCY.....	12
OVERALL, THESE CHANGES DID NOT BUDGE THE FORECAST, 2021 IS SLIGHTLY LOWER	13
OUR LONG-TERM WIRELESS INFRASTRUCTURE MARKET FORECAST REMAINS UNCHANGED, IT PEAKS	
IN 2022	15
THE NEW US ADMINISTRATION WILL HAVE NO IMPACT ON OUR UPDATED FORECAST	16
AND OPEN RAN WILL CONTINUE ITS ASCENSION	16
HOME TO THE WORLD’S LARGEST WIRELESS NETWORK FOOTPRINTS, ASIA PACIFIC WILL REMAIN THE LARGEST MARKET	18
NORTH AMERICA WILL REMAIN THE WORLD’S SECOND LARGEST WIRELESS INFRASTRUCTURE MARKET AFTER ASIA PACIFIC	
.....	19
EMEA WILL CRAWL BACK TO MODERATE GROWTH.....	20
AND CALA WILL BOUNCE BACK IN 2022	21

Abstract

This report analyzes the 1Q21 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 2020, 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 the 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 pattern analysis, and upgrade and expansion plans.