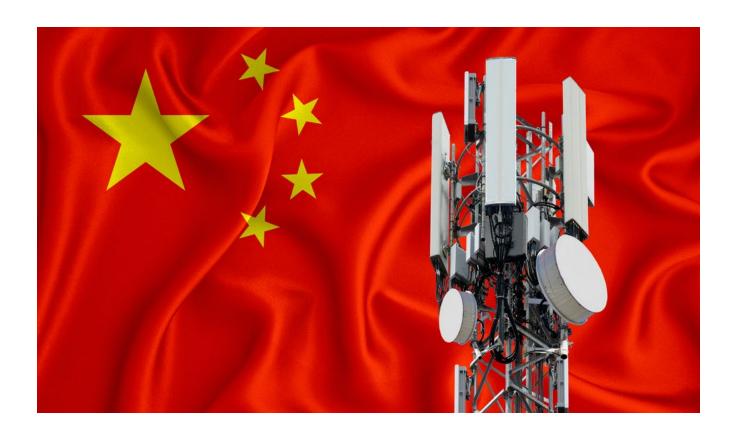


## CHINA WIRELESS INFRASTRUCTURE FY21 – APRIL 2022

Despite COVID-19 and unabated geopolitical headwinds, China is pursuing its economic ascension and 5G aspiration





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DESPITE COVID-19 AND UNABATED GEOPOLITICAL HEADWINDS, CHINA IS PURSUING ITS ECASCENSION AND 5G ASPIRATION	
2022 HAS STARTED WITH SIGNIFICANT HEADWINDS THAT ARE SLOWING CHINA'S ECONOMY	6
However, slower economic growth may not prevent China from becoming the world's largest economic	
THE END OF THIS DECADE	
THAT CHINA WAS ON TRACK TO TAKE OVER THE U.S. AS THE WORLD'S LARGEST ECONOMIC POWER WAS PREDICTI	
AGOCOVID-19 WAS THE FINAL TOUCH	
COVID-19 has reset the GDP race between the U.S. and China	
However, China's aging population may get in the way of China's economy overtaking that of the	
Chinese government economists are worried	
and see 5G as a key enabler of China's digital economy	
China's 5G-based digital economy is rapidly taking off and paving the way for 6G	
From economic power to 5G superpower	
BY FAR, CHINA BOASTS THE WORLD'S LARGEST BTS FOOTPRINT	
AND THE WORLD'S LARGEST MOBILE TOTAL AND 5G SUBSCRIBER BASE	
2022 WILL SEE THE SAME LEVEL OF 5G UNIT ACTIVITY AS LAST YEAR	13
Despite a slight increase in 5G BTS, 5G capex will decline this year	14
The slight 5G spending decline and the 4G drop will drag the whole RAN market down 5% over 2	02115
In 2026, we expect China to kick off 6G rollouts	15
The combined domestic market share of Huawei and ZTE rose to 89% from 80% in 2021	
We rightly anticipated that Huawei and ZTE would continue to dominate the market at the expe	-
Ericsson and Nokia	
Once again, China delivered, under extreme pressure	
BOTTOM LINE: CHINA IS BECOMING ISOLATED AND SELF-RELIANT, AND DIVIDES THE WORLD INTO $\mathbf 2$ SPHERES OF IN	
Geopolitics altering the 5G race prompted many companies to shift manufacturing away from Ch	
Re-shoring chip manufacturing takes time and is not cheap	
And if cut from U.S. technology, China's home-grown chip makers won't be able to expand	
So many things can go wrong in this West vs. East game	19



## **Abstract**

This report focuses on 5G developments in China, including macroeconomics, geopolitics, and technology. The publication date is scheduled a few weeks after the 4 service providers (China Broadcasting Network, China Mobile, China Telecom, China Unicom) provide their annual reports so that we can gather many details about 2H21 and provide a 2022 outlook and a 5-year forecast. This report also includes RAN vendor market shares and analysis.