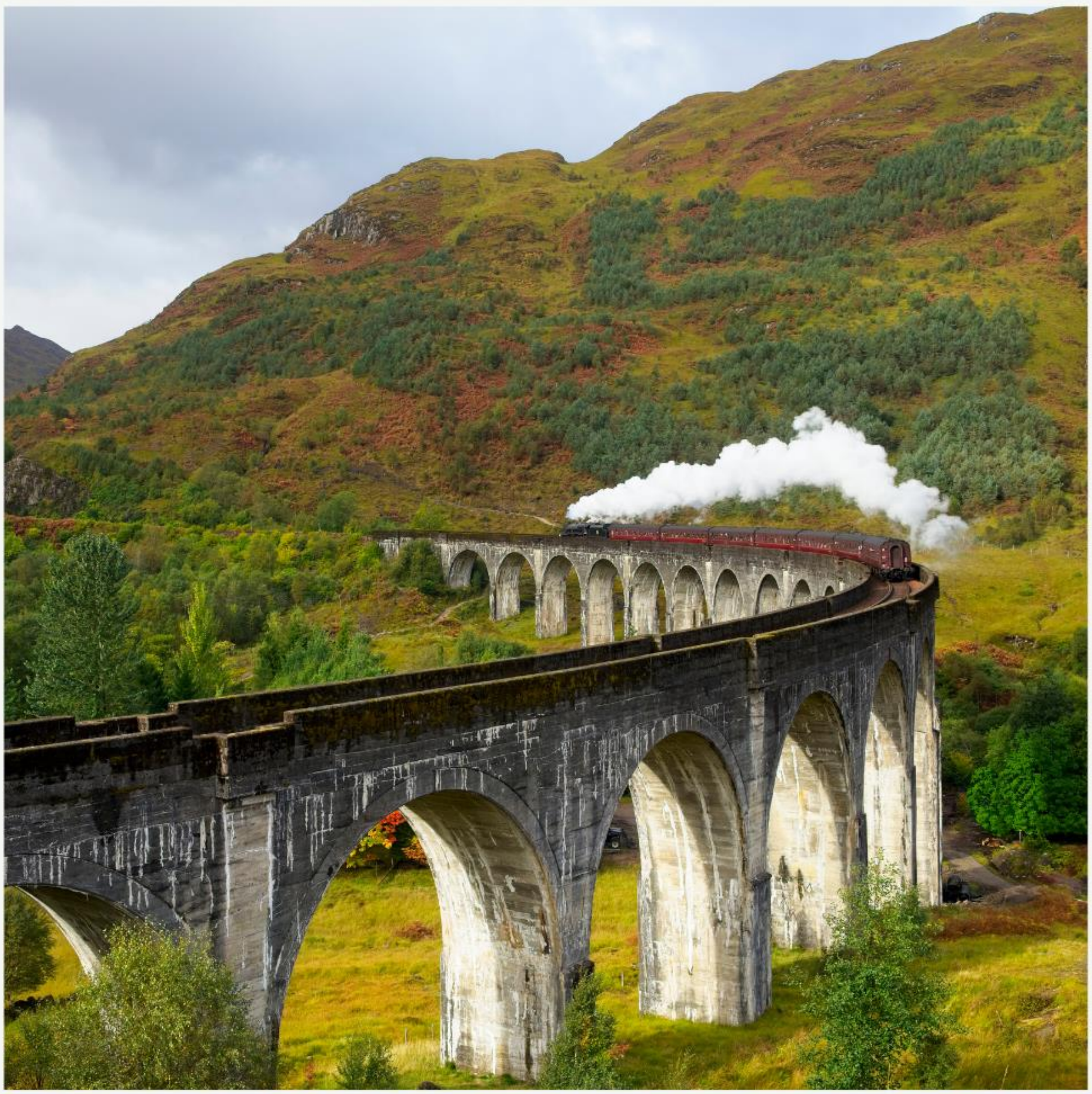
Open RAN 2024



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METHODOLOGY

Mobile Experts collects shipment data from RF component vendors and other suppliers in the industry to keep an accurate count of base station and RU deployment. Our background research on hardware shipments relies on data inputs from more than 40 companies to keep track of macro, massive MIMO, small cell, mm-wave, and other radios.

In addition to tracking hardware, we surveyed more than 30 CTO-level experts at leading operators, Tier One OEMs, and emerging suppliers of hardware and software for Open RAN. We spend a lot of time with these contacts in reviewing cost analysis and performance benchmarks to fully understand the benefits of Open RAN and how they expect to take advantage of the benefits. We contrasted the inputs that we received from the major OEMs (negative on ORAN) to the positive comments from operators and smaller suppliers to arrive at an independent conclusion.

In each of our market segments, we estimate the adoption of Open RAN procurement strategies based on the strength of the Open RAN driving forces for each segment individually. This guides our long-term projections as to how the Open RAN architecture will be adopted widely. In particular, we rely on opinions of leading operators in the software area for our long-term forecast related to adoption of RIC and applications.