

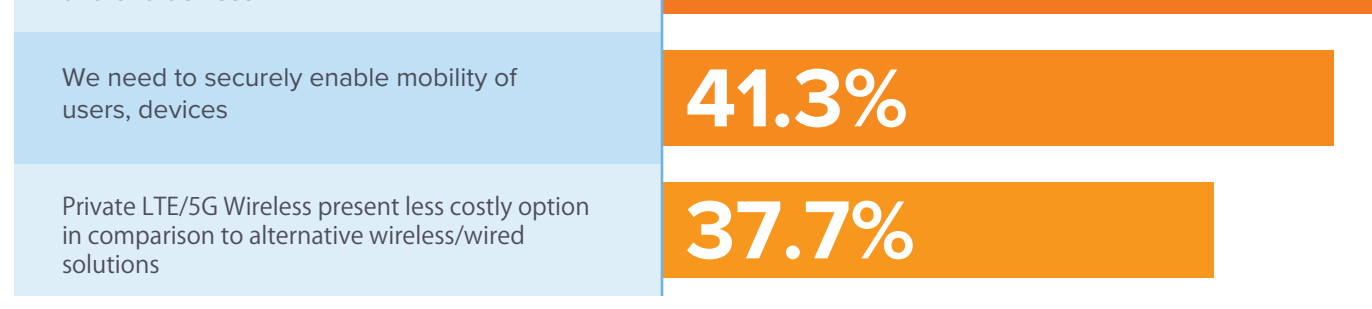


The Emerging Ecosystem and Opportunities for 5G Private Networks

Trends Driving 5G Private Network Deployments

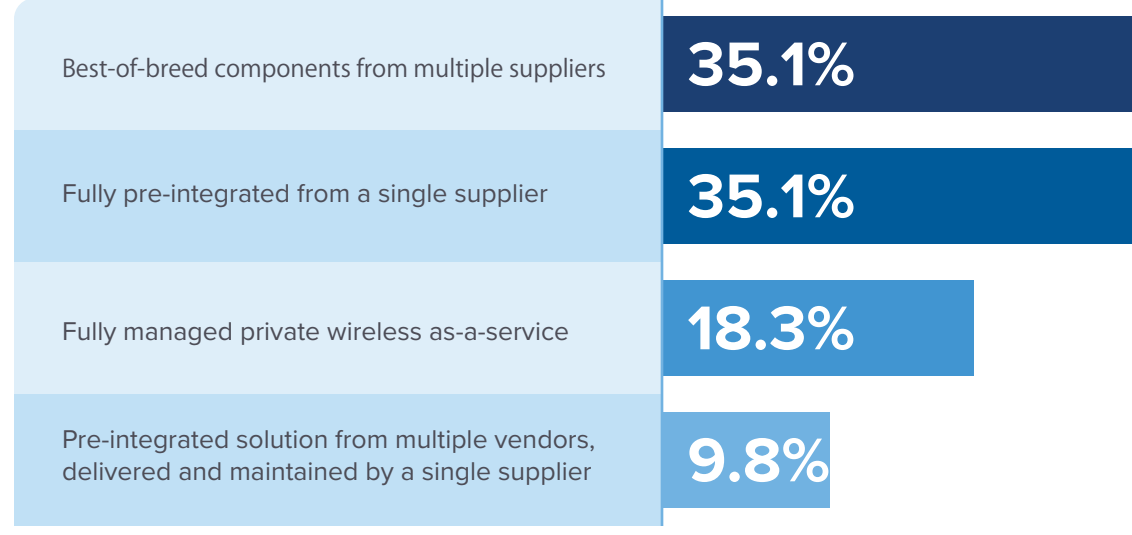
Top Drivers for 5G Private Networks

Increased control, security, and cost-savings are the top three drivers for 5G private networks.



n = 1,202; Source: IDC's Private LTE & 5G Survey, April 2022

Multi-supplier choice and a fully integrated solution from a single supplier are the preferred consumption models for private 5G wireless infrastructure.



n = 1,202; Source: IDC's Private LTE & 5G Survey, April 2022

Market Forecast and Growth Drivers

Private Network Infrastructure Revenue Forecast

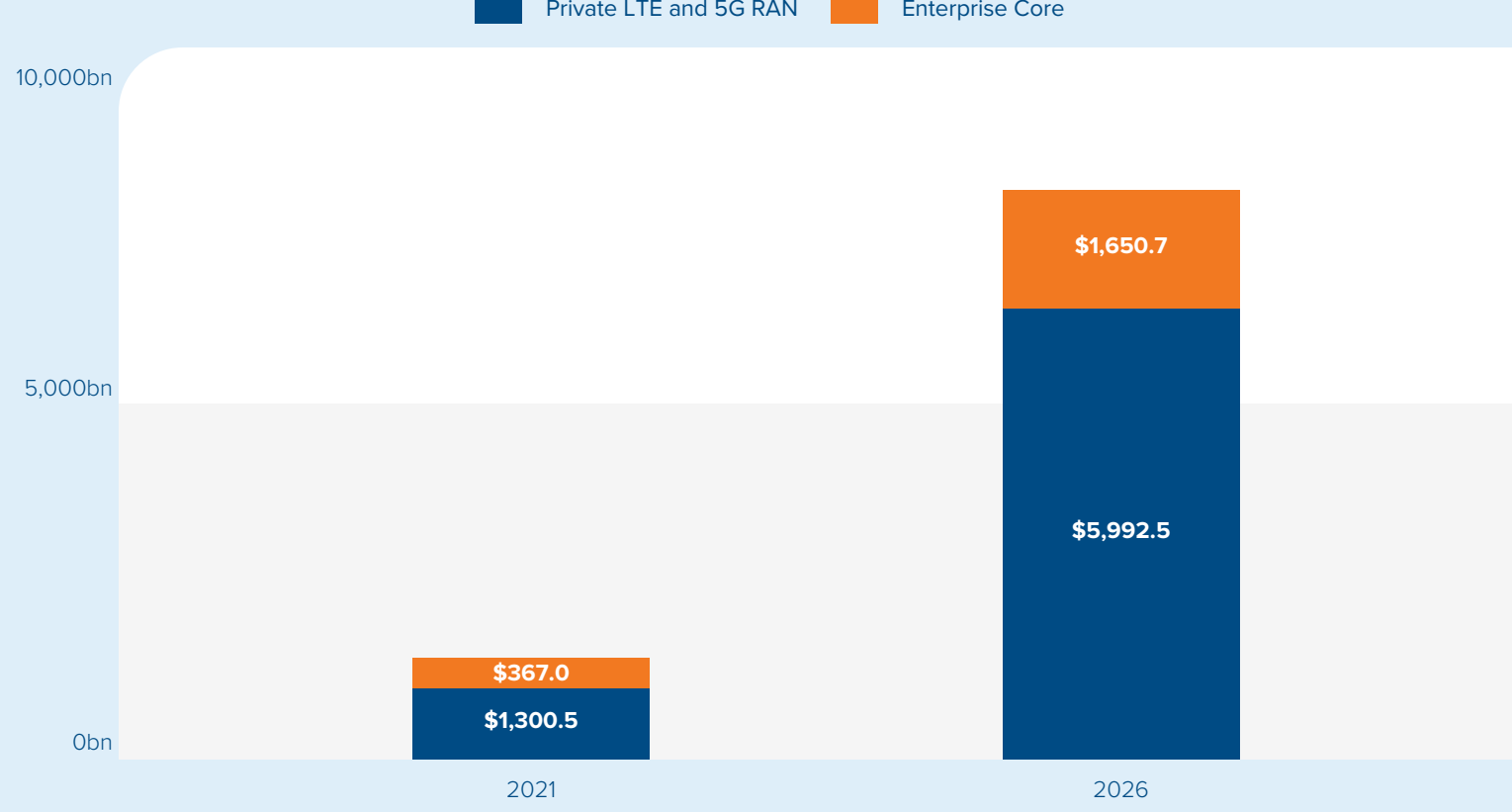
Worldwide private LTE/5G infrastructure revenue will grow from an estimated \$1.3 billion in 2021 to an estimated \$7.6 billion in 2026.



LTE RAN kit will comprise the bulk of spending over the period, with 5G radios seeing stronger adoption toward the latter portion of the forecast.

LTE RAN kit **CAGR = 35.7%**
Enterprise Core **CAGR = 35.1%**

Worldwide Private LTE/5G Wireless Infrastructure Revenue (\$M)



Source: IDC Worldwide Private LTE/5G Wireless Infrastructure Forecast, 2021-2026

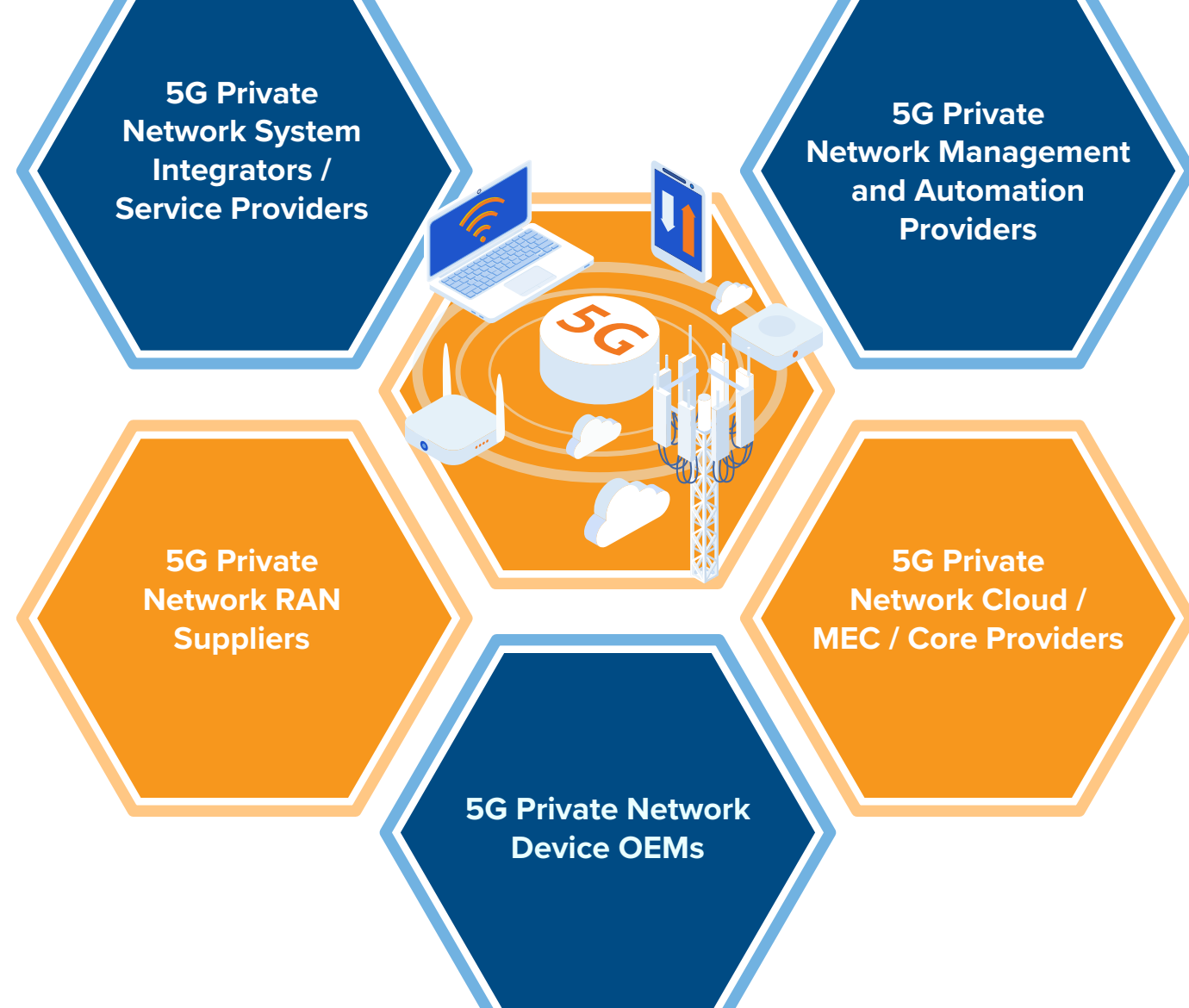
Growth drivers include:

The emergence of global channels to consume private LTE/5G wireless infrastructure.

Private LTE/5G increasingly aligns with a NAAS model approach, simplifying consumption and easing adoption.

Private LTE/5G increasingly is seen as a viable alternative to land mobile radio-based networking for mission-critical organizations.

Acceleration is Driven by the Emerging Ecosystem



Conclusion

5G private network end users need a “one-stop-shop” opportunity with multi-vendor choice. When making a selection, organizations should:

- Select a multi-vendor 5G private network ecosystem that allows for the best cost and flexibility trade off.
- Ensure customer- and vertical-specific use cases are met and 5G customization is possible via programmability and automation by leveraging both cloud and edge.
- Select system integrators that use solutions to efficiently plan, deploy, and manage 5G networks at scale with automation that optimizes and ensures the 5G services.
- Consider models/solutions that allow for fully managed 5G private network if desired, as well as self-managed by the enterprise.



Message from the Sponsor

Qualcomm Technologies is at the forefront of 5G, and private networks are no exception. Our latest tech innovations and partner initiatives are accelerating the myriad of benefits modern 5G Private Networks have to offer. Qualcomm Technologies is breaking down barriers to deliver 5G Private Networks of the future, spanning verticals with 5G optimized use cases. Our 5G Private Network enabling spans pre-integrated solutions with multi-vendor choice along with an open, customizable RAN automation and management offering to streamline design, deployment and operation of Private Networks, accelerating their benefit to Enterprises of all shapes and sizes.

[Learn more about our practical innovations for 5G private networks.](#)