



*How 5G is Impacting Infrastructure Hardware and
Connector Buying Trends*

Research Report M-980-20
September 2020



Bishop & associates, inc.

Performance and Forecast of the World Connector Industry

5G Infrastructure

How 5G is Impacting Infrastructure Hardware and Connector Buying Trends

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Written for connector manufacturers and channel partners, equipment vendors, and industry analysts, Bishop & Associates' newest research report, **5G Infrastructure – How 5G is Impacting Infrastructure Hardware and Connector Buying Trends** focuses on how broadband service providers are overhauling their infrastructure to provide for the next-gen use cases that are grabbing headlines.



The first waves of broadband infrastructure changes are in-process and already impacting the types of connectors used, who buys them, and how often. The impact is being felt in mobile infrastructure and through the wireline carrier central office and traditional cable television equipment markets. These networks are being converged. As the foundational changes needed for network convergence reach critical levels of implementation next-gen use cases will be ramping up. The first waves of infrastructure streamlining now in process will be a defining trend in broadband equipment connector purchasing through 2025.

The 5G Infrastructure report focuses on how the telecom industry is breaking from its past to prepare for tomorrow. 5G and the first wave of changes underway will introduce a new normal to the infrastructure connector market. Radio area networks will become increasingly sophisticated, and their ongoing evolution will support connector industry growth above 27% through 2025. Connector sales for the rack-based equipment used throughout the rest of the network will grow as well but at a lower rate. The differences here are partly due to the accelerating adoption of more efficient software-defined open-source hardware platforms to replace the proprietary equipment sets that prevail today. The open-source hardware sector of the market will grow at an accelerating pace through 2025.

For service providers to profitably provide a greatly expanded set of services at acceptable prices, they need to first transition to a simpler, more unified infrastructure. As significantly, they need to do it at a pace that makes business sense. Their platforms need to support existing subscribers and ongoing increases in bandwidth as well as be flexible enough to quickly address next-gen use cases. To this end, communication service providers are following the playbook used by the hyper-scale datacenters. The hyper-scalers improved their service flexibility and dramatically reduced costs by converting their voice, video, and data hardware onto unified software-defined hardware platforms based on IP-protocols. What differentiates the telecom industry challenges is that they are implementing these same changes across many hundreds of thousands of locations worldwide.

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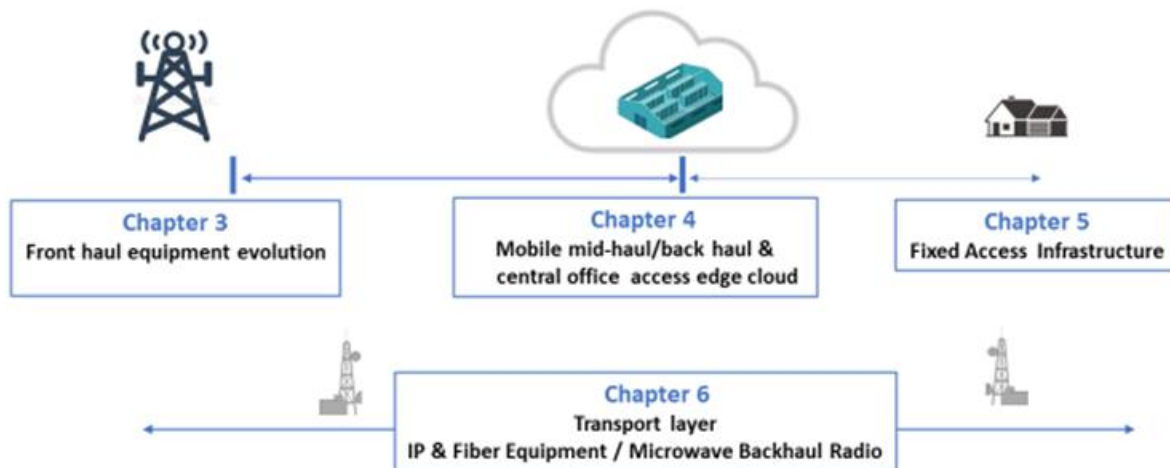
Projections for how the 5G infrastructure market will unfold vary dramatically. If you read the headlines, you might think it is here now. And people may buy their 5G phones tomorrow, but the anticipated service improvements will be incremental and introduced over time. New spectrum will be phased in over years. Radio networks will evolve in phases to provide added 4G-LTE support as well as support the introduction of new 5G services. The underlying networks will be modified to provide for more independent control interfaces.

Our forecasts are based on fundamental equipment trends and how they will impact connector value per equipment class at a strategic level. These are uncertain times. Currency exchange rates, spectrum auction timing, heightened political unrest, new disruptive technologies, and of course, the issues related to COVID-19 all impact predictions.

The report outline provides insight as to how 5G and the hardware changes in-process will impact connector buying trends and a reference timetable for when they will be deployed. Timelines may move in or move out, but the significant changes outlined in this report will largely play out over the next five years.

Chapter Summaries:

There are four chapters of more technical content to the report. Each covers a different segment of the communications service operator infrastructure. The focus in each section is on the primary equipment types, the transitions in progress, and how they will impact connector buying trends.



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