

#5GMadeTogether

OPEN RAN DEPLOYMENTS - WHAT'S NEXT FOR CEE. 5G LAB LAUNCH

— Roundtable summary report

— BACKGROUND

BACKGROUND

Massive potential of wide-spread 5G implementation in almost all sectors of the economy is not disputed. It has been made even more clear around the world as more and more countries and industries look towards private 5G networks for great economic and innovative benefits. Thus, deployments of fifth generation mobile networks have remained a top priority for governments and the private sector stakeholders around the world. While much progress has been made in the field over the past twelve months in most CEE states, especially in terms of assigning frequency bands for 5G roll-out, increasing coverage and in several cases providing regulatory framework for deployments of private 5G networks in the industry and in local governments, many Central Eastern European countries are still lagging behind the global competition in terms of providing fifth generation mobile connectivity and making the most of latest trends in 5G development.

According to EY's "Reimagining Industry Futures Study"¹, up to 57% of enterprises globally plan on investing in 5G-based solutions over the next three years, while about a fifth of companies is already doing so. Nearly half of enterprises are interested in looking into the private 5G capabilities. Indeed, according to Global Mobile Suppliers Association (GSA)'s² report of June 2022, about 37% of industrial private networks use 5G at the moment. Research by DataHorizon³ shows that the private 5G market will be growing at 48,2% CAGR and reach a volume of 129,6 bln USD by 2032. Open RAN also remains a significant disruptor of the telecommunications market. According to Dell'Oro⁴, Open RAN's share in the entire RAN market has grown in the recent years at a rate far exceeding previous estimates. Open RAN revenues are expected to account for around 15 percent of the overall RAN market by 2027.



ABOUT THE EVENT

During the latest 5G Techritory, Europe's leading 5G ecosystem forum in Riga, a roundtable meeting side event titled “#5GMadeTogether: Open RAN deployments - what's next for CEE. 5G Lab launch” was held. Electronic communications officials, governmental representatives, academics, private companies' representatives and other experts reflected on the progress of Open RAN in the region and beyond it, shared their takeaways from installations taking place in their countries, and considered the next steps to be taken by decision-makers and the mobile networks industry.

The discussion followed up on the last year's #5GMadeTogether roundtable held at 5G Techritory 2022, dedicated to kick-starting the discussion on the future of telecommunications in Central and Eastern Europe, sharing best practices and inspiring stakeholders to think big in terms of the potential of CEE to take responsibility for its mobile networks development and become a true innovation leader and technology exporter.

This year, the progress made since the last meeting was evaluated and recent developments and changes in the regional field of 5G mobile networks were reflected on. Particular focus was put on the growing importance of private networks - their economic potential and emerging regulatory frameworks supporting their implementation.

During the event, IS-Wireless and Technical University of Riga, cohosts of the meeting, also announced the launch of the region's first Open RAN 5G laboratory set up at the Riga Technical University's Faculty of Electronics and Telecommunications. The newly established laboratory will enable further research and evaluation of Open RAN architecture.



PARTICIPANTS

The roundtable meeting provided a platform engaging a diverse group of stakeholders in the conversation on the future of mobile networks in Central-Eastern Europe. The meeting featured a wide range of guests representing the private sector (providers of mobile networks solutions and telecommunication operators) as well as public officials (representatives of central public administration and regulatory offices responsible for electronic communications).



The speakers included:

Sławomir Pietrzyk

IS-Wireless

Guntars Saidāns

The Electronic Communications
Office of Latvia

Kristina Mikoliūnienė

The Communications Regulatory
Authority of the Republic of Lithuania

Magdalena Zgorzałek

Ministry of Foreign Affairs of Poland

Catherine Page

Department of Science, Innovation
and Technology, United Kingdom

Nick Johnson

UK Telecoms Innovation Network

Michał Kanownik

CEE Digital Coalition

Petar Ivanov

Google

Aleksandrs Ipatovs

Riga Technical University

Guntis Ancāns

The Electronic Communications
Office of Latvia

Jurga Grudzinskaitė-Gainovskė

The Communications Regulatory
Authority of the Republic of Lithuania

Agata Czysznic-Dobrowolska

Ministry of Foreign Affairs of Poland

David Taylor

Department of Science, Innovation
and Technology, United Kingdom

Kaspars Ozoliņš

Freeport of Riga Authority

Timo Jokiahho

RedHat

Abdel Bagegni

Telecom Infra Project

Māris Aleksandrovs

The Electronic Communications
Office of Latvia

Darius Kuliešius

The Communications Regulatory
Authority of the Republic of Lithuania

Irma Kazlienė

The Communications Regulatory
Authority of the Republic of Lithuania

Łukasz Cudny

Polish Embassy in Riga

Leo Harris

Department of Science, Innovation
and Technology, United Kingdom

Ernst-Joachim Steffens

CampusDynA project

Sanna Brandt

Rohde&Schwarz

Jacek Raubo

Defence24



DISCUSSION HIGHLIGHTS

The conversation was led and moderated by Rafał Sanecki, Head of Marketing at IS-Wireless. Commenting on the changing landscape of mobile networks in the region, affected by a growing interest in private 5G and increasing impact of Open RAN, speakers pointed out the fact that Central Eastern European countries must still foster far-reaching, closer cooperation in the field in order to fully capture the potential of 5G networks.

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Closer international cooperation is a must for the mobile networks of the future and for other digital technologies to reach their full potential in CEE. Our region's countries have very different strategies and approaches towards developing the digital economy and key technologies. We should at least aim to coordinate and align our work in fields of cybersecurity, AI, IoT and more, including 5G deployments. Exchange of experience and know-how is a must

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Central Eastern Europe still needs as whole lot more of joint, international, ambitious ICT projects and enterprises in the mobile networks branch to become involved in joint activities

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Collaborative ecosystem, promoting innovation and joint projects is an absolute must for technological progress and development of novel business models in the mobile networks industry

The importance of collaborative effort was also noted in terms of designing standards.

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We need a collaborative approach bringing operators and vendors together, operating in an ecosystem, agreeing on performance criteria and other moving parts that come with Open RAN deployments

According to participants of the meeting, the region is far from but may use the emerging opportunities to fill this niche and become a significant mobile networks hub for Europe and the world.

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Central Eastern Europe still looks for the ICT sector's niches to specialize in. Mobile networks industry, dynamically growing, developing novel business models may be one of the areas for our regions to specialize in, as we can see innovative companies emerging in CEE, working in this field

Speakers noted that the region should play to its strengths and utilize the local human capital to boost the mobile networks industry.

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Central Eastern Europe is home to some of the most brilliant mathematicians and ICT specialists. We must use this massive potential to our full advantage

Providers and adopters of 5G technology shared their perspectives on the qualities of latest mobile networks they consider to be game changing and the future of connectivity.

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The technology we are currently developing right here is highly focused on extremely efficient use of limited computing and bandwidth resources in order to respond to the way mobile networks of tomorrow will be used around the world

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A quality of Open RAN that is often overlooked, is the RAN Intelligent Controller - RIC. Intelligently controlled network resources are a true game changer for industry purposes

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We see Open RAN as more than just DU and CU. In the future, spatial distribution of computing resources will be taking place all around us due to a growing significance of edge computing. This will answer to the need for apps to be running in a close proximity to the end-user

Experts argued that opening of the new Open RAN laboratory established at the RTU is one of the first steps towards reaching the ambitious 5G goals in the region.

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The first dedicated Open RAN lab in the region can be a part of the response to insufficient opportunities and rate of adoption of private networks. A large group of private and public bodies are now engaged in the initiative looking to boost our region's transformation

Participants of the meeting pointed out that policy-makers and regulators of electronic communications play a particularly important role in determining our ability to innovate and use the potential of mobile networks.

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One of the key roles of a regulator is supporting innovation and setting the table for the private sector to thrive. Clearly, supervision over safety and following proper standards while innovating is also a must

Representatives of western partners of Central Eastern European states shared their suggestions and takes on the development of CEE's telecommunications ecosystem.

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The laboratory is a fantastic step on the region's way towards capturing the 5G potential. We have found out that sending a clear message from the government to the industry, that the state is determined and willing to pursue a specific path of development, e.g. in terms of Open RAN or private networks, makes a great impact

To become a part of the conversation, learn more about the #5GMadeTogether initiative, events held at 5G Techritory or get in touch with the participants, please reach out to:



Rafal Sanecki
r.sanecki@is-wireless.com





Resources

¹https://assets.ey.com/content/dam/ey-sites/ey-com/en_gl/topics/tmt/tmt-pdfs/ey-reimagining-industry-futures-2023-report.pdf

²<https://gsacom.com/paper/private-mobile-networks-june-2022-summary/>

³<https://www.globenewswire.com/news-release/2023/09/05/2737535/0/en/Private-5G-Network-Market-Size-to-Reach-USD-129-6-Billion-by-2032-CAGR-48-2-DataHorizon-Research.html>

⁴<https://www.delloro.com/advanced-research-report/openran/>