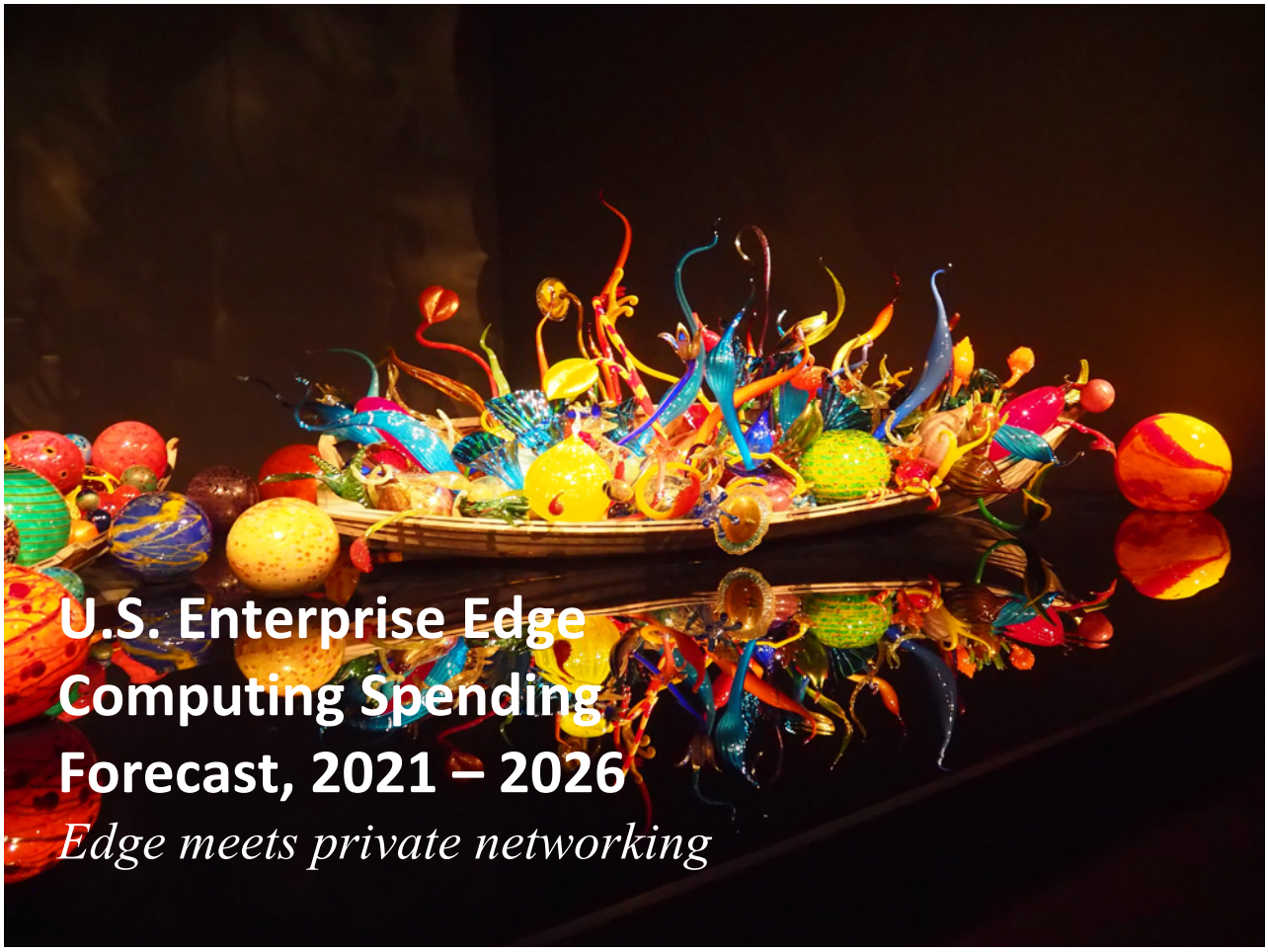

U.S. Enterprise Edge Computing Spending Forecast, 2021 – 2026

Edge meets private networking

U.S. Enterprise Edge Computing Spending Forecast, 2021-2026

A Market Study

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Abstract

Edge computing (EC) – and there are several different versions/approaches – emerged on the wireless industry stage several years ago. Edge computing is as disruptive a technology as anything that is being discussed today – 5G, NFV/SDN, Open RAN, etc. In fact, edge computing is part of the solution to fully realize the promise of 5G particularly since the new 5G system architecture is designed to capitalize on virtualization.

The edge computing market has also shifted significantly in the last two years. Originally designed by and for the telcos, edge compute is now firmly the purview of the hyperscalers. And as enterprises are deploying private wireless networks, so edge compute is part of the solution.

iGR defines an edge computing hardware platform as a secure, virtualized platform which can be "opened up" to third parties – content providers, application developers, etc. That platform might incorporate an LTE or 5G NR radio (including the CBRS band), Wi-Fi or some combination of them. Today, most edge compute implementations use Ethernet and/or Wi-Fi and not cellular. But this is likely to change relatively quickly, as more private LTE/5G networks (primarily based on CBRS) get deployed and more 4G/5G-based IoT devices are brought to market.

In this market study, iGR discusses edge computing, especially how it relates to the mobile industry, provides in depth case studies of some of the successful edge computing deployments, and forecasts enterprise spending on EC-based solutions for the U.S. market from 2021 to 2026.

Key questions addressed in this market study include:

- What is edge computing and how does it work?
- What is the ETSI Multi-access Edge Computing (MEC) initiative?
- What are the focuses of other edge computing consortiums and initiatives, such as Open Networking Foundation (ONF), Open Edge Computing Initiative, Open Compute Project, EdgeX Foundry, 5G Future Forum and Telco Edge Cloud Forum?
- How does edge computing relate to the public cloud, especially when a mobile operator (MNO) deploys at the edge? What are some recent MNO / public cloud/hyperscaler partnerships?
- To date, where and how have edge computing solutions been successfully deployed?
- What are some of the perceived benefits and issues related to edge computing?

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- Which vendors have products and services to support enterprise edge computing?
- How much enterprise spending is likely to occur on EC-based solutions?

Who should read this report?

- Data center OEMs and operators
- Mobile operators
- Infrastructure OEMs
- Computing infrastructure OEMs
- Small cell product and solution vendors
- Backhaul service providers and equipment OEMs
- Financial analysts and investors.

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