U.S. MNO Edge Computing Spending Forecast, 2021 – 2026: *Extending the Edge Cloud*

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A Market Study

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Abstract

Edge computing (EC), along with software defined networking (SDN) and network function virtualization (NFV), is helping mobile operators realize the promise of 5G. But in the case of edge computing, much has changed in the last 24 months.

In addition to the edge computing technology, the business model of edge computing is also being developed. In the last two years many partnerships between mobile network operators and public cloud providers have been formed, and these will support the use of edge computing for many new 5G use cases. In short, the mobile operators are building the edge cloud into their mobile networks. This effort is ongoing with the move to cloud RAN; while edge computing does not require cloud RAN, and vice versa, they are somewhat related.

This market study forecasts what U.S. mobile operators will spend to build and operate edge computing centers, in various locations, in the next five years.

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 and the hyperscalers, especially when a mobile operator (MNO) deploys at the edge? What are some recent MNO / public cloud 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?
- Which vendors have products and services to support edge computing?
- What are the edge computing strategies / initiatives / partnerships of the major U.S. mobile operators?
- How much will U.S. mobile operators spend to build and operate edge computing resources in their mobile networks over the next five years?

Who should read this report?

- Mobile operators

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