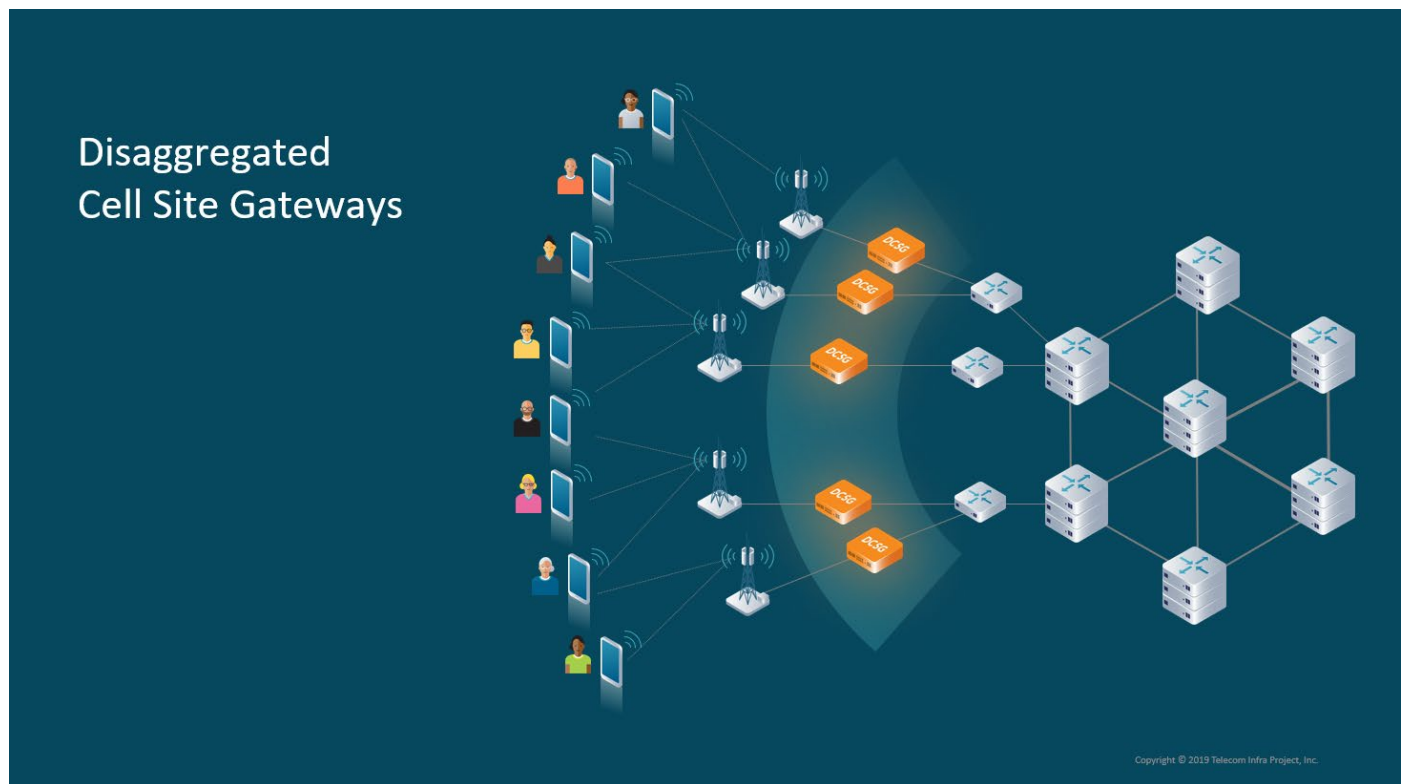




## Disaggregating the cell site gateway – December 2020

The phenomenal installed base is under attack!



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SOME SAY CELL SITE GATEWAY, OTHER SAY ROUTER; OUR RESEARCH INDICATES CSG HAVE ROUTING CAPABILITIES AND FIT THE ROUTER BILL ..... 7

*These CSGs reside between the RAN and the aggregation router ..... 7*

*Calling a DCSG a white box is an unambiguous strong statement ..... 8*

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*Tiers 1 CSPs support and through TIP, drive the disaggregation journey..... 9*

*The elimination of vendor lock in and the abundance of NOS software are the chief DCSG drivers..... 10*

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*With its Silicon One and IOS XR7 launched in December 2019, Cisco has a lead..... 14*

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*However, all agree that with 5G coming, the viability of the DCSG remains to be proven ..... 14*

*RAN architecture and topology and 5G use cases are the key factors for consideration..... 15*

*Ericsson neither envisions routing functionality at the gNB nor at the cell site..... 15*

*3GPP Rel. 16 features IAB, a new backhaul concept that eliminates the need for CSGs/CSRs..... 15*

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*And at the end of the day, the more disaggregation, the more integration ..... 16*

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## Abstract

This report explores the emergence of the Disaggregated Cell Site Gateways (DCSG) market. DCSG are white-box cell site gateways or routers based on an open and disaggregated architecture for existing 2G/3G/4G and future 5G network architectures. The report analyzes DCSG architectures and implementations, including its emerging ecosystem, and tracks white box hardware units and sales, and software sales, all broken down by regions including North America, Europe Middle East Africa, Asia Pacific, and Caribbean Latin America. It includes the total number of cell sites worldwide and a 5-year forecast. As this market is just emerging, it is too early to publish vendor market shares.