



VISION FOR WIRELESS VENTURES

# Mobile Experts:

## SDR Market Study

# SDR Market Study

## Background:

- Mobile Experts selected to conduct market study
- Compiled information for multiple markets:
  - Wireless Handsets/Terminals
  - Mobile Infrastructure
  - Military Tactical Radio
  - Land Mobile Radio
  - Satellite Communications & Other

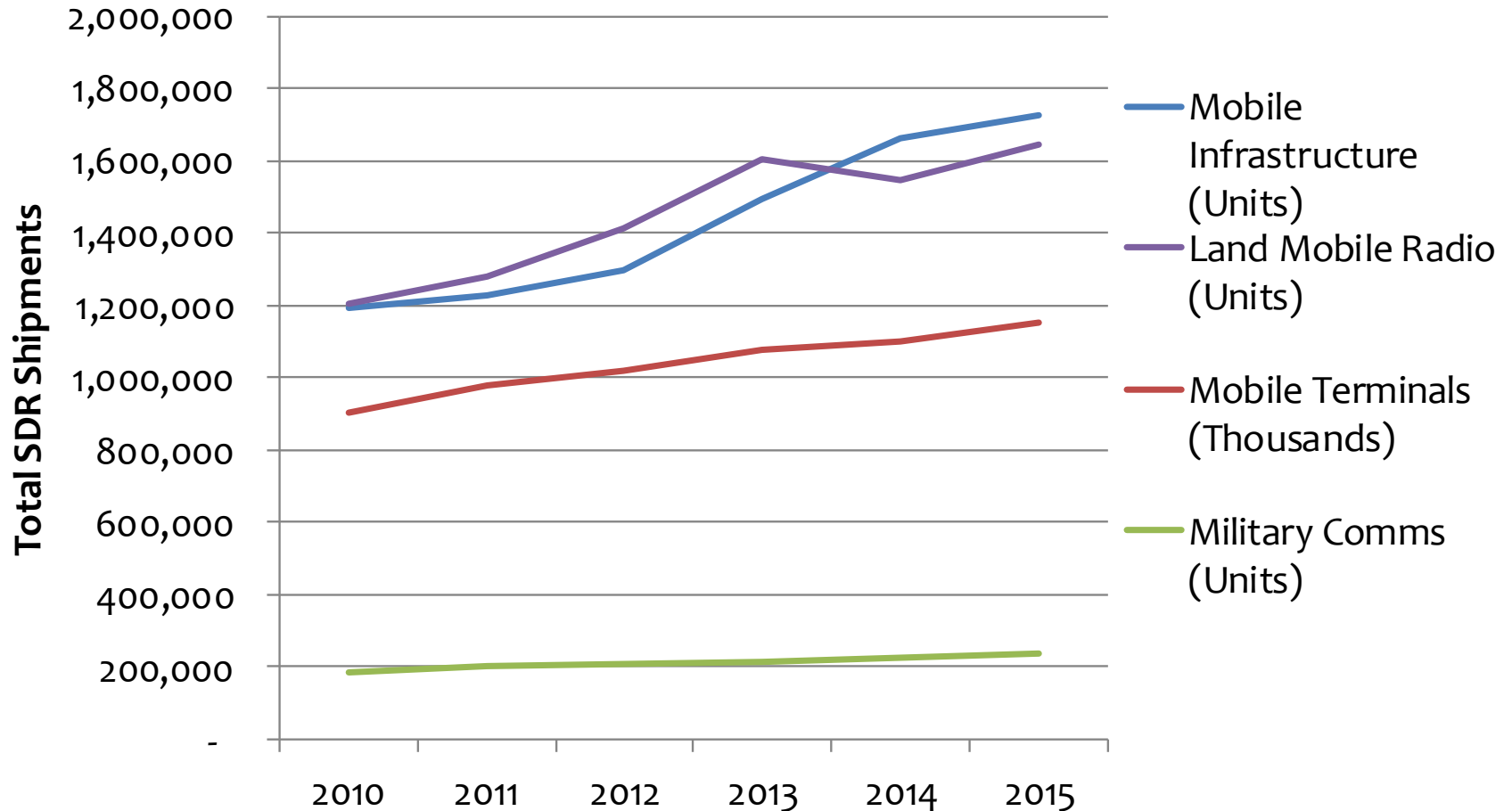
# Market Overview

- SDR technology has been highly successful!

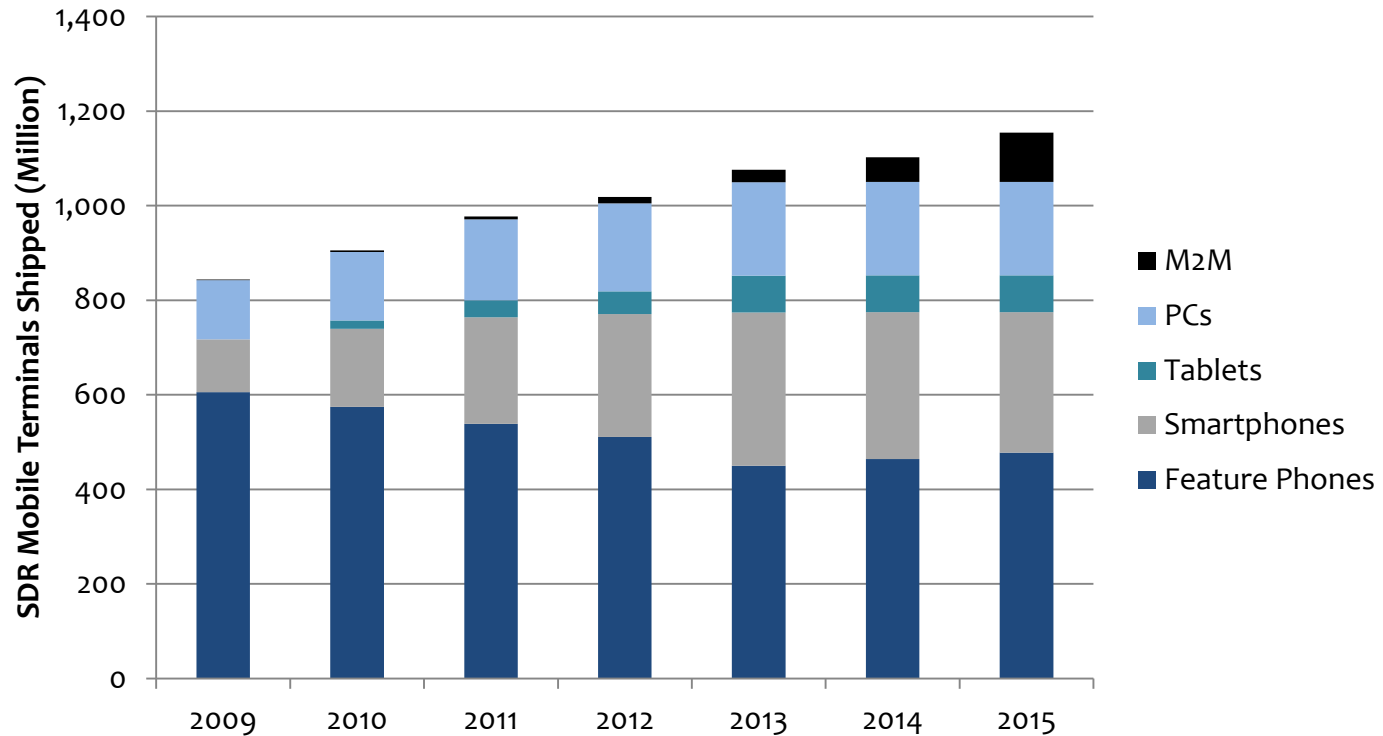
## **SDR Forecast Highlights for 2012:**

- Over 1 Billion mobile terminals
- Almost 1.3 million mobile base stations
- More than 200,000 military tactical radios
- Over 1.4 million land mobile radios

# SDR Market Growth

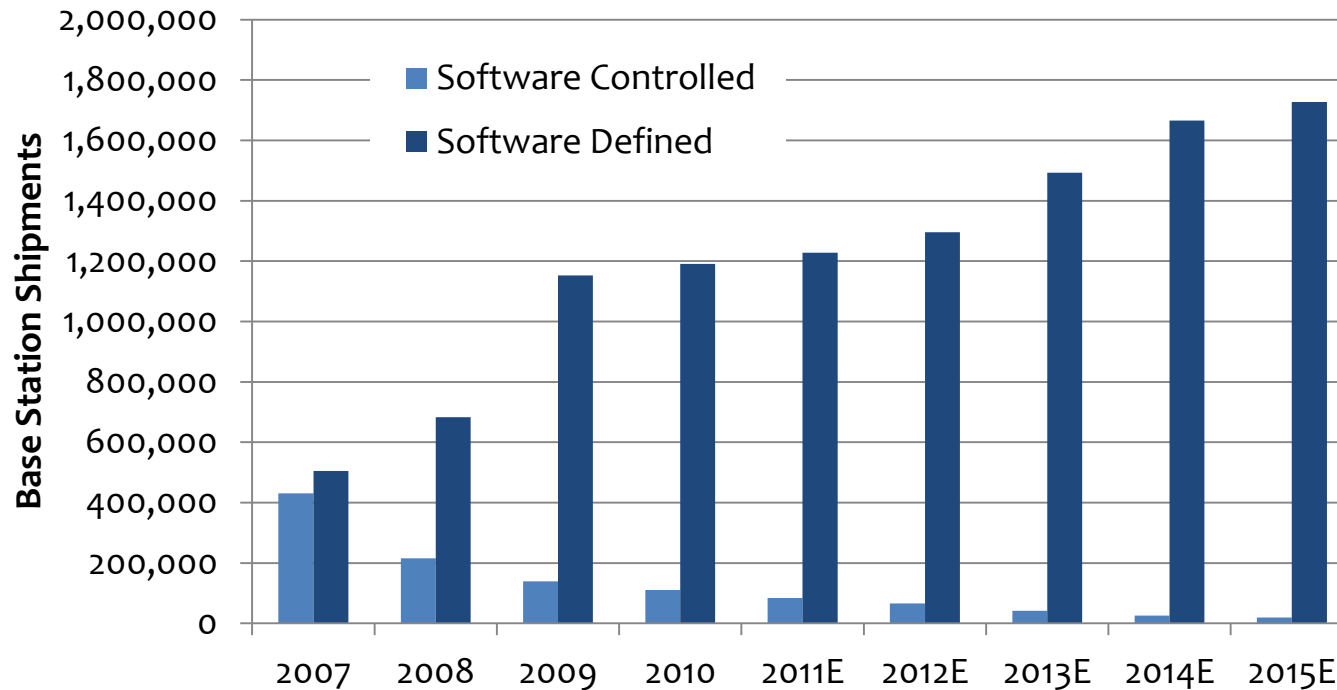


# Mobile Terminals



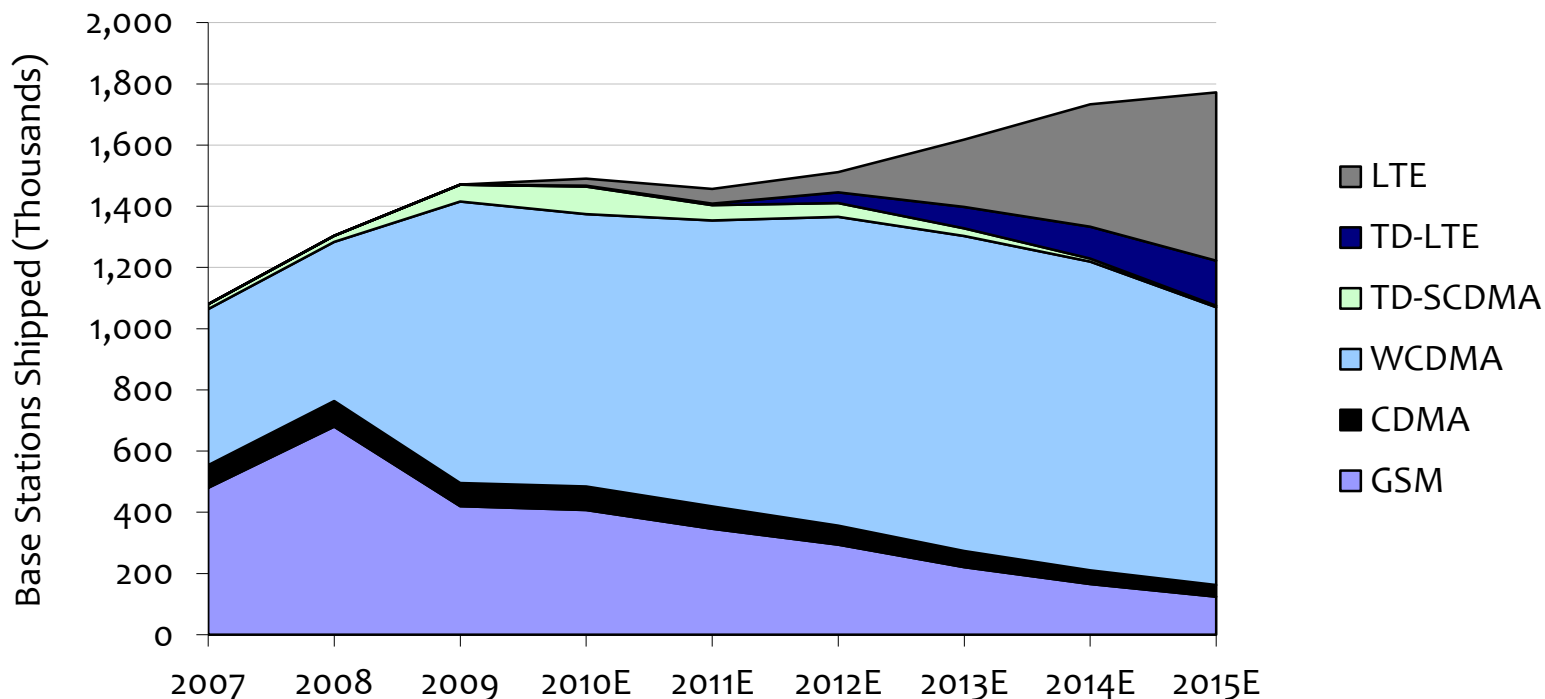
- Overall, more than half of mobile terminals use programmable DSPs in the radio chain
- Not all mobile phones use SDR technology because product life cycles are short and ASICs can compete
- Smartphones are driving growth

# Mobile Infrastructure



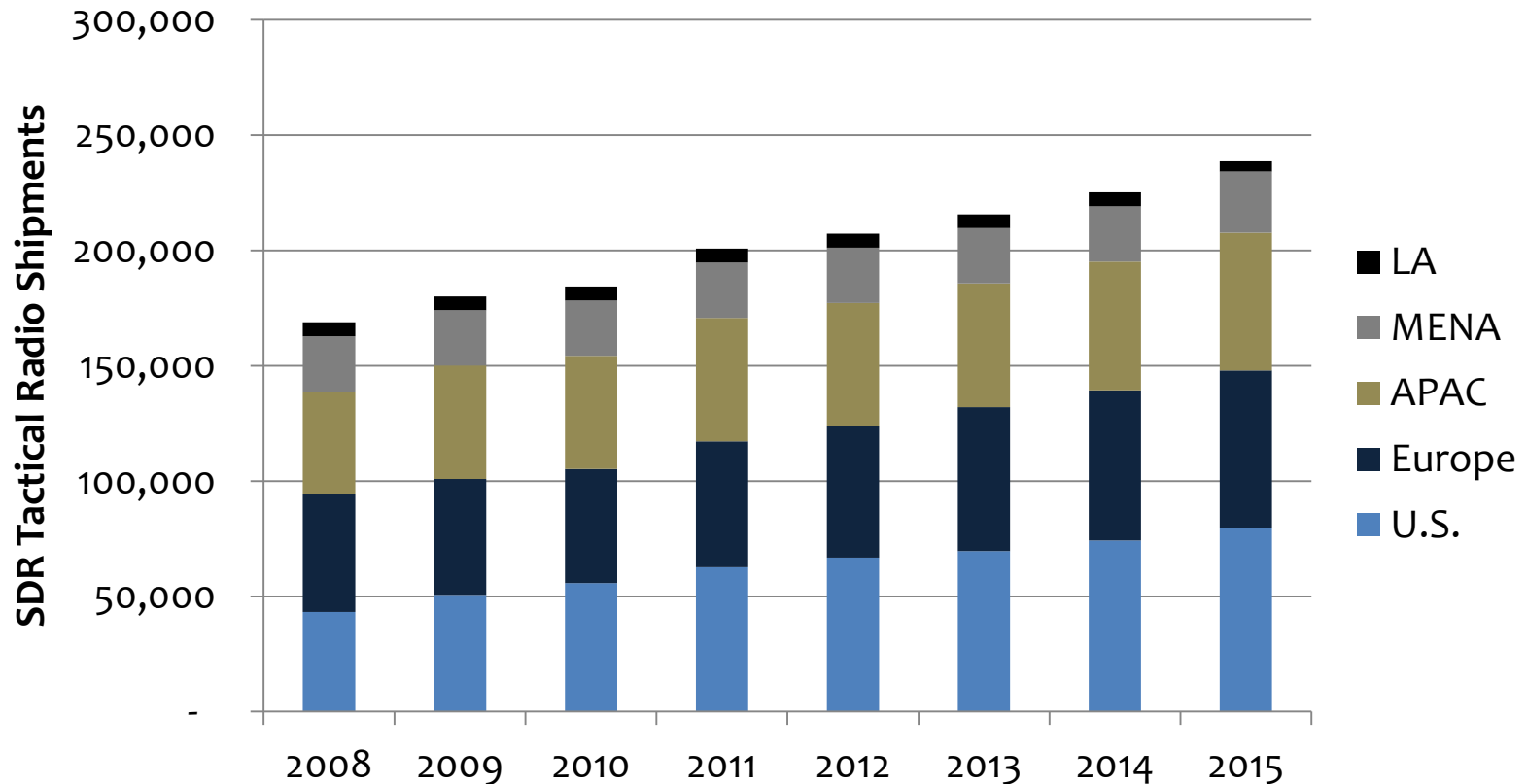
- 93% of base stations ship with SDR architecture now, with FPGAs or DSPs
- The trend is overwhelmingly toward SDR to allow future flexibility

# Mobile Infrastructure



- WCDMA is the biggest application today
- LTE and TD-LTE will drive the growth
- The number of transceivers per base station is growing... to 12 TRX/base station for TD-LTE and 6 for LTE-FDD.

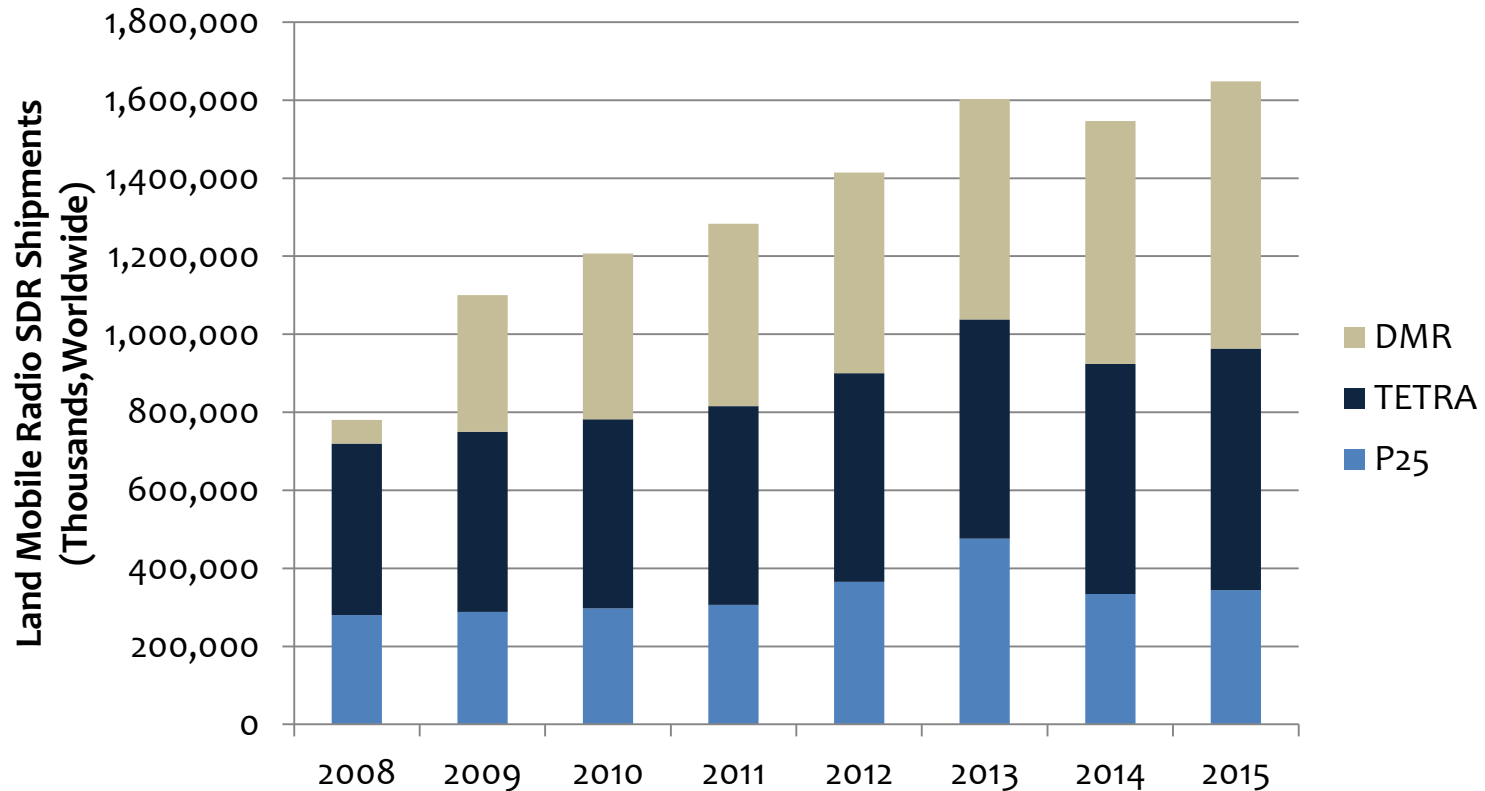
# Military Tactical Radio



- Steady growth is expected in tactical radio
- USA is the largest user but APAC and Europe are sizable




# Land Mobile Radio



- Steady growth is expected with adoption of DMR in private professional applications
- Look for a spike of activity in P25 radios in 2013 to comply with US FCC narrowbanding regulations

# Market Study

- The Mobile Experts market study is available to Wireless Innovation Forum members
- Go to: [www.wirelessinnovation.org/Document Library](http://www.wirelessinnovation.org/Document_Library)
- Click on link: <http://groups.winnforum.org/p/do/sd/sid=3155>

A man in a dark suit is shown in silhouette, looking through a telescope. He is positioned on the right side of the frame. In the background, on the left, a mobile phone antenna stands on a dark, silhouetted hill. The sky is a deep blue with scattered white and grey clouds. The overall scene suggests a metaphorical 'long-term vision' through technology.

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**Mobile Experts  
provides long-term vision  
...not fluff.**