

**U.S. Outdoor Small  
Cells, 2014 - 2019:  
*Still early stages of  
market growth***

Market Study  
Third Quarter, 2015





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# **U.S. Outdoor Small Cells, 2014 - 2019: *Still early stages of market growth***

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## **A Market Study**

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## Abstract

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In this report, *iGR* presents a total addressable market forecast and an “actual” forecast for two types of outdoor small cells: metrocells and remote radio heads (RRHs) that are deployed as small cells (i.e., not on a macrocell tower or site).

*iGR* expects outdoor small cells to be installed on street furniture (e.g., bus stop shelters, poles, building sides and roofs). If the metrocell or RRH is collocated with a macrocell site (e.g., building roof), but not actually installed on the structure where the macrocell antennas, etc., are installed, then *iGR* considers that to also be a small cell installation.

Note that this report does not include outdoor distributed antenna systems (oDAS). It also does not include any indoor deployments of small cells or DAS. Note further that this report only applies to the United States.

Metrocells are low power cell sites that operate on an operator’s licensed frequency to provide additional coverage and/or capacity in a given urban area. Their baseband is integrated within the overall form factor, along with power and backhaul ports.

A remote radio head (RRH) has an integrated radio frequency (RF) unit that is connected via fronthaul to centralized baseband processing units.

The assumptions underlying *iGR*’s outdoor small cell forecasts are explained in this report. The forecasts are further based on *iGR*’s global connections forecast report and *iGR*’s mobile data forecast report, as well as *iGR*’s primary and secondary research, and various other sources.

Key questions addressed in this report include:

- What is an outdoor small cell? What are metrocells and RRHs?
- How do outdoor small cells fit into operators’ evolving networks?
- Where are outdoor small cells most likely to be located? What’s their role?
- What is the total addressable market in the U.S. for outdoor small cells?
- How does the forecast for actual outdoor small cells deployments compare to the outdoor small cell total addressable market forecast?

Who should read this report?

- Mobile operators
- Infrastructure OEMs

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- Small cell product and solution vendors
- Backhaul service providers and equipment OEMs
- Financial analysts and investors.

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