

**Global Indoor Small  
Cells TAM Forecast,  
2015 - 2020:  
*Commercial and  
residential buildings***

Market Study  
Fourth Quarter, 2016





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# **Global Indoor Small Cells TAM Forecast, 2015-2020: *Commercial and residential buildings***

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A Market Study

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# Table of Contents

<b>Abstract .....</b>	<b>1</b>
<b>Executive Summary .....</b>	<b>3</b>
<b>Indoor Cellular Solutions .....</b>	<b>3</b>
<b>Total Addressable Market.....</b>	<b>3</b>
Commercial Buildings TAM .....	4
Systems .....	4
Figure A: Global Commercial In-Building Systems TAM by Size of Building, 2015-2020 .....	4
Nodes .....	4
Figure B: Global Commercial In-Building Nodes TAM by Size of Building, 2015-2020 .....	5
Residential Buildings TAM .....	5
Households.....	5
Figure C: Global Households in TAM by Type of Household, 2015-2020 .....	6
Nodes .....	6
Figure D: Global Nodes in TAM by Type of Household, 2015-2020 .....	6
<b>Methodology.....</b>	<b>7</b>
<b>Basic Mobile Operator Network Architecture .....</b>	<b>9</b>
Figure 1: Basic Components of Cellular Voice/Data Network .....	9
<b>Devices .....</b>	<b>11</b>
<b>MIMO.....</b>	<b>12</b>
<b>Wireless Spectrum.....</b>	<b>13</b>
<b>Cell Sites .....</b>	<b>14</b>
<b>Fronthaul &amp; Backhaul .....</b>	<b>15</b>
Figure 2: Cell Site Backhaul Capabilities and Use Cases, Wired and Wireless.....	16
<b>Mobile Network Core .....</b>	<b>16</b>
Figure 3: Overview of the EPC.....	17
<b>Setting the Stage for Small Cells .....</b>	<b>18</b>
<b>Network “Pain Points” .....</b>	<b>18</b>
<b>Different Types of Small Cells .....</b>	<b>19</b>
Figure 4: Het-Net Overview.....	20
<b>iGR’s Definitions of Small Cells.....</b>	<b>21</b>
Table 1: Different Types of Small Cells, Licensed and Unlicensed Spectrum .....	21
<b>Distributed Antenna Systems (DAS).....</b>	<b>22</b>
Figure 5: Basic DAS Configuration .....	23
Figure 6: DAS, BTS Hotels, and Remote Radio Heads.....	24
<b>Hybrid Antenna System .....</b>	<b>24</b>
<b>DAS/Small Cell Architecture .....</b>	<b>25</b>
<b>Distributed “Network” Systems .....</b>	<b>26</b>
<b>Neutral-Host DAS vs. Single Host DAS .....</b>	<b>26</b>
Table 2: Benefits of Neutral-Host DAS .....	27
<b>Changing Nature of DAS .....</b>	<b>28</b>

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Figure 7: Types of DAS.....	29
<b>Femtocells and Picocells .....</b>	<b>29</b>
<b>Indoor Small Cells: Pros and Cons .....</b>	<b>31</b>
<b>Benefits of Deploying In-Building Small Cells .....</b>	<b>31</b>
<b>Cons of Deploying In-Building Small Cells.....</b>	<b>31</b>
<b>Building Materials .....</b>	<b>33</b>
<b>Assumptions: Indoor Small Cells.....</b>	<b>35</b>
<b>Indoor Small Cell Total Addressable Market Methodology .....</b>	<b>38</b>
<b>Commercial Buildings TAM .....</b>	<b>38</b>
Assumptions.....	38
Systems in TAM .....	39
Nodes in TAM .....	39
<b>Residential Buildings TAM .....</b>	<b>40</b>
Assumptions.....	40
Households in TAM .....	41
Nodes in TAM .....	41
<b>Global Commercial Building TAM .....</b>	<b>43</b>
<b>Commercial Floor Space and Buildings.....</b>	<b>43</b>
Table 3: Commercial Floor Space by Region, 2015-2020 (square meters).....	43
Figure 8: Commercial Floor Space by Region, 2015-2020 (square meters) .....	44
Table 4: Commercial Buildings by Region, 2015-2020 .....	44
Figure 9: Commercial Buildings by Region, 2015-2020 .....	45
<b>Systems TAM.....</b>	<b>45</b>
Table 5: Global Commercial In-Building Systems TAM by Region, 2015-2020.....	45
Figure 10: Global Commercial In-Building Systems TAM by Region, 2015-2020 .....	46
Table 6: Global Commercial In-Building Systems TAM by Region, 2015-2020 (percent) .....	46
Figure 11: Global Commercial In-Building Systems TAM by Region, 2015-2020 (percent)...	47
Table 7: Global Commercial In-Building Systems TAM by Size of Building, 2015-2020 .....	48
Figure 12: Global Commercial In-Building Systems TAM by Size of Building, 2015-2020 .....	48
Table 8: Global Commercial In-Building Systems TAM by Size of Building, 2015-2020 (percent).....	48
Figure 13: Global Commercial In-Building Systems TAM by Size of Building, 2015-2020 (percent).....	49
<b>Nodes TAM.....</b>	<b>49</b>
Table 9: Global Commercial In-Building Nodes TAM by Region, 2015-2020.....	49
Figure 14: Global Commercial In-Building Nodes TAM by Region, 2015-2020 .....	50
Table 10: Global Commercial In-Building Nodes TAM by Region, 2015-2020 (percent) .....	50
Figure 15: Global Commercial In-Building Nodes TAM by Region, 2015-2020 (percent).....	51
Table 11: Global Commercial In-Building Nodes TAM by Size of Building, 2015-2020 .....	52
Figure 16: Global Commercial In-Building Nodes TAM by Size of Building, 2015-2020 .....	52
Table 12: Global Commercial In-Building Nodes TAM by Size of Building, 2015-2020 (percent).....	53

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Figure 17: Global Commercial In-Building Nodes TAM by Size of Building, 2015-2020 (percent).....	53
<b>North America Commercial Building TAM.....</b>	<b>54</b>
<b>Commercial Floor Space and Buildings.....</b>	<b>54</b>
Table 13: North America Commercial Floor Space, 2015-2020 (square meters) .....	54
Figure 18: North America Commercial Floor Space, 2015-2020 .....	54
Table 14: North America Commercial Buildings by Size, 2015-2020.....	55
Figure 19: North America Commercial Buildings by Size, 2015-2020 .....	55
<b>Systems TAM.....</b>	<b>55</b>
Table 15: North America Commercial Systems TAM by Size, 2015-2020 .....	56
Figure 20: North America Commercial Systems TAM by Size, 2015-2020 .....	56
<b>Nodes TAM.....</b>	<b>56</b>
Table 16: North America Nodes in TAM, 2015-2020.....	57
Figure 21: North America Nodes in TAM, 2015-2020 .....	58
<b>Latin America and Caribbean Commercial Building TAM.....</b>	<b>59</b>
<b>Commercial Floor Space and Buildings.....</b>	<b>59</b>
Table 17: Latin America Commercial Floor Space, 2015-2020 (square meters) .....	59
Figure 22: Latin America Commercial Floor Space, 2015-2020.....	59
Table 18: Latin America Commercial Buildings by Size, 2015-2020 .....	60
Figure 23: Latin America Commercial Buildings by Size, 2015-2020 .....	60
<b>Systems TAM.....</b>	<b>60</b>
Table 19: Latin America Commercial Systems TAM by Size, 2015-2020 .....	61
Figure 24: Latin America Commercial Systems TAM by Size, 2015-2020.....	61
<b>Nodes TAM.....</b>	<b>61</b>
Table 20: Latin America Nodes in TAM, 2015-2020 .....	62
Figure 25: Latin America Nodes in TAM, 2015-2020 .....	62
<b>Europe Commercial Building TAM .....</b>	<b>63</b>
<b>Commercial Floor Space and Buildings.....</b>	<b>63</b>
Table 21: Europe Commercial Floor Space, 2015-2020 (square meters) .....	63
Figure 26: Europe Commercial Floor Space, 2015-2020 .....	63
Table 22: Europe Commercial Buildings by Size, 2015-2020.....	64
Figure 27: Europe Commercial Buildings by Size, 2015-2020 .....	64
<b>Systems TAM.....</b>	<b>64</b>
Table 23: Europe Commercial Systems TAM by Size, 2015-2020.....	65
Figure 28: Europe Commercial Systems TAM by Size, 2015-2020 .....	65
<b>Nodes TAM.....</b>	<b>65</b>
Table 24: Europe Nodes in TAM, 2015-2020.....	66
Figure 29: Europe Nodes in TAM, 2015-2020 .....	66
<b>Middle East and Africa Commercial Building TAM .....</b>	<b>67</b>
<b>Commercial Floor Space and Buildings.....</b>	<b>67</b>
Table 25: MEA Commercial Floor Space, 2015-2020 (square meters) .....	67
Figure 30: MEA Commercial Floor Space, 2015-2020 .....	67
Table 26: MEA Commercial Buildings by Size, 2015-2020.....	68
Figure 31: MEA Commercial Buildings by Size, 2015-2020 .....	68

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<b>Systems TAM</b> .....	<b>68</b>
Table 27: MEA Commercial Systems TAM by Size, 2015-2020 .....	69
Figure 32: MEA Commercial Systems TAM by Size, 2015-2020 .....	69
<b>Nodes TAM</b> .....	<b>69</b>
Table 28: MEA Nodes in TAM, 2015-2020.....	70
Figure 33: MEA Nodes in TAM, 2015-2020 .....	70
<b>Asia-Pacific Commercial Building TAM</b> .....	<b>71</b>
<b>Commercial Floor Space and Buildings</b> .....	<b>71</b>
Table 29: Asia-Pacific Commercial Floor Space, 2015-2020 (square meters) .....	71
Figure 34: Asia-Pacific Commercial Floor Space, 2015-2020.....	71
Table 30: Asia-Pacific Commercial Buildings by Size, 2015-2020 .....	72
Figure 35: Asia-Pacific Commercial Buildings by Size, 2015-2020.....	72
<b>Systems TAM</b> .....	<b>72</b>
Table 31: Asia-Pacific Commercial Systems TAM by Size, 2015-2020 .....	73
Figure 36: Asia-Pacific Commercial Systems TAM by Size, 2015-2020.....	73
<b>Nodes TAM</b> .....	<b>73</b>
Table 32: Asia-Pacific Nodes in TAM, 2015-2020 .....	74
Figure 37: Asia-Pacific Nodes in TAM, 2015-2020 .....	74
<b>Japan Commercial Building TAM</b> .....	<b>75</b>
<b>Commercial Floor Space and Buildings</b> .....	<b>75</b>
Table 33: Japan Commercial Floor Space, 2015-2020 (square meters) .....	75
Figure 38: Japan Commercial Floor Space, 2015-2020.....	75
Table 34: Japan Commercial Buildings by Size, 2015-2020 .....	76
Figure 39: Japan Commercial Buildings by Size, 2015-2020.....	76
<b>Systems TAM</b> .....	<b>76</b>
Table 35: Japan Commercial Systems TAM by Size, 2015-2020 .....	77
Figure 40: Japan Commercial Systems TAM by Size, 2015-2020.....	77
<b>Nodes TAM</b> .....	<b>77</b>
Table 36: Japan Nodes in TAM, 2015-2020 .....	78
Figure 41: Japan Nodes in TAM, 2015-2020.....	78
<b>Global Residential TAM</b> .....	<b>79</b>
<b>Households</b> .....	<b>79</b>
Table 37: Households in TAM by Region, 2015-2020.....	79
Figure 42: Households in TAM by Region, 2015-2020.....	80
Table 38: Households in TAM by Region, 2015-2020 (percent) .....	80
Figure 43: Households in TAM by Region, 2015-2020 (percent).....	81
Table 39: Global Households in TAM by Type of Household, 2015-2020 .....	81
Figure 44: Global Households in TAM by Type of Household, 2015-2020 .....	82
Table 40: Global Households in TAM by Type of Household, 2015-2020 (percent).....	82
Figure 45: Global Households in TAM by Type of Household, 2015-2020 (percent) .....	83
<b>Nodes</b> .....	<b>83</b>
Table 41: Nodes in TAM by Region, 2015-2020 .....	83
Figure 46: Nodes in TAM by Region, 2015-2020 .....	84
Table 42: Nodes in TAM by Region, 2015-2020 (percent).....	84

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Figure 47: Nodes in TAM by Region, 2015-2020 (percent) .....	85
Table 43: Nodes in TAM by Type of Household, 2015-2020 .....	85
Figure 48: Nodes in TAM by Type of Household, 2015-2020 .....	86
Table 44: Nodes in TAM by Type of Household, 2015-2020 (percent) .....	86
Figure 49: Nodes in TAM by Type of Household, 2015-2020 (percent) .....	87
<b>North America Residential TAM .....</b>	<b>88</b>
<b>Households.....</b>	<b>88</b>
Table 45: North America Households, 2015-2020 .....	88
Figure 50: North America Households, 2015-2020 .....	88
Table 46: North America Households in TAM, 2015-2020 .....	89
Figure 51: North America Households in TAM, 2015-2020 .....	89
<b>Nodes .....</b>	<b>89</b>
Table 47: North America Nodes in TAM, 2015-2020.....	90
Figure 52: North America Nodes in TAM, 2015-2020 .....	90
Table 48: North America Nodes in TAM, 2015-2020 (percent).....	90
Figure 53: North America Nodes in TAM, 2015-2020 (percent).....	91
<b>Latin America and Caribbean Residential TAM .....</b>	<b>92</b>
<b>Households.....</b>	<b>92</b>
Table 49: Latin America Households, 2015-2020 .....	92
Figure 54: Latin America Households, 2015-2020 .....	92
Table 50: Latin America Households in TAM, 2015-2020.....	93
Figure 55: Latin America Households in TAM, 2015-2020 .....	93
<b>Nodes .....</b>	<b>93</b>
Table 51: Latin America Nodes in TAM, 2015-2020 .....	94
Figure 56: Latin America Nodes in TAM, 2015-2020 .....	94
Table 52: Latin America Nodes in TAM, 2015-2020 (percent) .....	95
Figure 57: Latin America Nodes in TAM, 2015-2020 (percent) .....	95
<b>Europe Residential TAM .....</b>	<b>96</b>
<b>Households.....</b>	<b>96</b>
Table 53: Europe Households, 2015-2020 .....	96
Figure 58: Europe Households, 2015-2020 .....	96
Table 54: Europe Households in TAM, 2015-2020 .....	97
Figure 59: Europe Households in TAM, 2015-2020 .....	97
<b>Nodes .....</b>	<b>97</b>
Table 55: Europe Nodes in TAM, 2015-2020.....	98
Figure 60: Europe Nodes in TAM, 2015-2020 .....	98
Table 56: Europe Nodes in TAM, 2015-2020 (percent).....	98
Figure 61: Europe Nodes in TAM, 2015-2020 (percent).....	99
<b>Middle East and Africa Residential TAM .....</b>	<b>100</b>
<b>Households.....</b>	<b>100</b>
Table 57: MEA Households, 2015-2020 .....	100
Figure 62: MEA Households, 2015-2020 .....	100
Table 58: MEA Households in TAM, 2015-2020 .....	101
Figure 63: MEA Households in TAM, 2015-2020.....	101

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<b>Nodes</b> .....	<b>101</b>
Table 59: MEA Nodes in TAM, 2015-2020.....	102
Figure 64: MEA Nodes in TAM, 2015-2020 .....	102
Table 60: MEA Nodes in TAM, 2015-2020 (percent).....	103
Figure 65: MEA Nodes in TAM, 2015-2020 (percent).....	103
<b>Asia-Pacific Residential TAM</b> .....	<b>104</b>
<b>Households</b> .....	<b>104</b>
Table 61: Asia-Pacific Households, 2015-2020.....	104
Figure 66: Asia-Pacific Households, 2015-2020.....	104
Table 62: Asia-Pacific Households in TAM, 2015-2020 .....	105
Figure 67: Asia-Pacific Households in TAM, 2015-2020 .....	105
<b>Nodes</b> .....	<b>105</b>
Table 63: Asia-Pacific Nodes in TAM, 2015-2020 .....	106
Figure 68: Asia-Pacific Nodes in TAM, 2015-2020.....	106
Table 64: Asia-Pacific Nodes in TAM, 2015-2020 (percent) .....	107
Figure 69: Asia-Pacific Nodes in TAM, 2015-2020 (percent) .....	107
<b>Japan Residential TAM</b> .....	<b>108</b>
<b>Households</b> .....	<b>108</b>
Table 65: Japan Households, 2015-2020.....	108
Figure 70: Japan Households, 2015-2020.....	108
Table 66: Japan Households in TAM, 2015-2020 .....	109
Figure 71: Japan Households in TAM, 2015-2020 .....	109
<b>Nodes</b> .....	<b>109</b>
Table 67: Japan Nodes in TAM, 2015-2020 .....	110
Figure 72: Japan Nodes in TAM, 2015-2020.....	110
Table 68: Japan Nodes in TAM, 2015-2020 (percent) .....	111
Figure 73: Japan Nodes in TAM, 2015-2020 (percent).....	111
<b>Indoor Small Cell Vendor Profiles</b> .....	<b>112</b>
<b>Advanced RF Technologies, Inc. (ADRF)</b> .....	<b>112</b>
<b>Airspan Networks</b> .....	<b>113</b>
<b>Argela</b> .....	<b>115</b>
<b>Bandwidth Logic</b> .....	<b>119</b>
<b>Betacom Incorporated</b> .....	<b>119</b>
<b>Black Box Network Services</b> .....	<b>120</b>
<b>Brocade</b> .....	<b>122</b>
<b>BTI Wireless</b> .....	<b>124</b>
<b>C Squared Systems (C<sup>2</sup> Systems)</b> .....	<b>126</b>
<b>Cisco</b> .....	<b>128</b>
Figure 74: Cisco Universal Small Cell Solution.....	129
<b>Cobham Wireless</b> .....	<b>130</b>
<b>Comba Telecom</b> .....	<b>134</b>
<b>CommScope</b> .....	<b>136</b>
<b>Connectivity Wireless Solutions</b> .....	<b>141</b>
<b>Corning</b> .....	<b>143</b>

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<b>Crown Castle</b> .....	<b>146</b>
<b>Ericsson</b> .....	<b>149</b>
<b>Ethertronics</b> .....	<b>152</b>
<b>ExteNet Systems</b> .....	<b>155</b>
<b>Fujitsu Network Communications</b> .....	<b>157</b>
<b>Galtronics</b> .....	<b>158</b>
<b>Gemtek</b> .....	<b>161</b>
<b>Huawei</b> .....	<b>162</b>
<b>iBwave Solutions (Corning Incorporated)</b> .....	<b>165</b>
<b>ip.access</b> .....	<b>167</b>
<b>Juni</b> .....	<b>170</b>
<b>NEC</b> .....	<b>172</b>
<b>Nextivity</b> .....	<b>175</b>
<b>Nokia Networks</b> .....	<b>176</b>
<b>Oracle</b> .....	<b>180</b>
Figure 75: Oracle Communications Security Gateway .....	181
<b>Quortus</b> .....	<b>182</b>
<b>Samsung Electronics</b> .....	<b>184</b>
<b>Sercomm</b> .....	<b>186</b>
<b>SpiderCloud Wireless</b> .....	<b>188</b>
Figure 76: SpiderCloud E-RAN System.....	190
<b>SureCall</b> .....	<b>192</b>
<b>Taqua</b> .....	<b>193</b>
<b>Wilson Electronics</b> .....	<b>195</b>
<b>ZTE Corporation</b> .....	<b>196</b>
<b>Definitions</b> .....	<b>198</b>
<b>General</b> .....	<b>198</b>
<b>Device Types</b> .....	<b>198</b>
<b>Services</b> .....	<b>199</b>
<b>Network Technology</b> .....	<b>200</b>
<b>Regions</b> .....	<b>204</b>
<b>About iGR</b> .....	<b>205</b>
<b>Disclaimer</b> .....	<b>205</b>

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## Abstract

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Indoor small cells are used to provide improved coverage to mobile consumers worldwide when they are in their home or a commercial building. Many different types of solutions for solving in-building cellular voice/data quality exist, including Distributed Antenna Systems (DAS), Distributed Network Systems (DNS), picocells (enterprise small cells), femtocells (residential small cells) and signal boosters.

This market study presents a five-year forecast for the worldwide total addressable market (TAM) for indoor small cells. The TAM includes the number of systems and nodes for commercial buildings, and the number of households and nodes for residential buildings. The forecasts are provided at the global level, as well as for the six regions of North America, Latin America, Europe, Middle East and Africa, Asia-Pacific, and Japan.

Note that the Total Addressable Market represents the **potential** number of small cells that would be needed to address all coverage and capacity issues. This does **not** forecast the **actual** number of small cells installed indoors.

The report also discusses how small cells fit in the overall mobile network architecture. It also describes in detail the various in-building small cell solutions, as well as the benefits and issues surrounding their deployment.

Key questions addressed in this market study include:

- What is the worldwide total addressable market for indoor small cells in commercial buildings and how many systems and nodes are included in this TAM?
- What is the worldwide total addressable market for indoor small cells in residential buildings and how many households and nodes are included in this TAM?
- What are the individual TAMs for commercial buildings and residential buildings for each of the six global regions?
- What does indoor mean and what are indoor small cells?
- How do small cells fit in the mobile network?
- What are some of the perceived benefits related to indoor small cells and what are the key drivers for their use?
- What are some of the perceived negatives and issues related to indoor small cells and what are the key barriers to their adoption?

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- Small cell product and solution vendors
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- Financial analysts and investors.

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