U.S. Indoor Small Cells Forecast, 2017 - 2022: *Connecting the building*

Market Study
Third Quarter, 2017

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Abstract

Indoor small cells will be a big part of mobile operators' networks even though they have mostly stopped paying for them. As a whole, the industry is focused on 5G – a key part of which is densification.

Small cells run the gamut from Distributed Antenna Systems (DAS), Distributed Radio Systems (DRS), picocells (enterprise small cells) and femtocells (residential small cells). The body of this report will provide definitions for each of these terms.

*iG*R classifies any system as "indoor" or "in-building" when the majority of its nodes (sites where the antennas are placed) are inside a building. *iG*R puts stadiums in the "indoor" category, along with hotels and airports to name a few.

In this report, *iG*R provides a forecast for the:

- Total addressable market (TAM) for indoor small cells
- Actual installed small cell nodes and installed systems. A system is, simply, the "head end" into which multiple operators plug their BTSes. In the case of a picocell, femtocell or DRS, *iG*R counts each of those as one system (since they currently only support a single mobile operator)

Key questions addressed in this market study include:

- What does indoor mean?
- What are indoor small cells?
- Where do small cells fit in the network?
- What are some of the perceived benefits and issues related to indoor small cells?
- What are the key drivers for using indoor small cells?
- What are some of the perceived negatives and issues related to indoor small cells?
- What are the key barriers to indoor small cell adoption?
- How large is the total addressable market for indoor small cells?
- How many indoor small cells are expected to be deployed?

Who should read this report?

- Mobile operators

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