U.S. Outdoor Small Cells Forecast, 2019 – 2025: *Even small cells get sick*

Market Study
Second Quarter 2020

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Abstract

Over the past few years, the outdoor small cell market in the U.S. has grown substantially, and *iG*R forecasts a healthy future for it – despite the impact of COVID-19.

This version of the small cell forecast has been updated based on the expected impact of the virus as *iG*R understands it today. *iG*R expects to update this forecast in late 2020 when more is known about the virus, its impact, and the global economy has, ideally, begun recovering.

Because of the impact of COVID-19, *iG*R has reduced its forecast for the number of Sub 6 GHz and mmWave outdoor small cells to be installed in the U.S. throughout the forecast period (2019-2025).

In this market study, *iG*R presents a total addressable market forecast and an "actual" forecast for U.S. outdoor small cell nodes installed: metrocells, remote radio heads as small cells, outdoor DAS and mmWave-based small cells.

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

Key questions addressed in this market study include:

- What is the effect of COVID-19 on outdoor small cell deployments?
- What is an outdoor small cell? What are metrocells, RRHs and oDAS?
- Why do the mobile networks need outdoor small cells to meet bandwidth demand?
- How do outdoor small cells fit into operators' evolving networks?
- What are the issues with deploying outdoor small cells in the U.S.? How do these issues impact the number of small cells in the market?
- What is the regulatory environment for deploying small cells?
- What are the differences between oDAS, metrocells and remote radio heads?
- What is the role of CPRI with outdoor small cells?
- Where are outdoor small cells most likely to be located? What's their role?
- How important is location to the effectiveness of an outdoor small cell?

- What is the total addressable market in the U.S. for outdoor small cells? How does this vary by small cells for mmWave and sub-6 GHz?
- How does the forecast for actual outdoor small cells deployments in the U.S. compare to the U.S. outdoor small cell total addressable market forecast? How does this vary by small cells for mmWave and sub-6 GHz?

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.