U.S. Office Buildings: *Cellular In-building Wireless Spending, 2020-2025*

Market Study
Second Quarter 2021

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Abstract

The installation of cellular in-building (IBW) systems in office buildings can serve multiple purposes, such as improve the security of enterprise data by using a private network, provide a network for building operations and security, and improve guests' and employees' experiences while in the building.

This market study provides a forecast of the cellular in-building wireless (IBW) market for office buildings. *iG*R found that due to the pandemic, the IBW market for 2020 and beyond is significantly different than it was previously. The 2021 revised forecast was modeled with:

- New data and assumptions regarding the (ongoing) COVID-19 pandemic
- Newly available data (November 2020) from the Commercial Buildings Energy Consumption Survey (CBECS)
- Information gathered from conversations with multiple solution providers in the IBW market.

Included in the market study is a five-year forecast for both network build spending and operational spending for the deployment of cellular IBW in U.S. office buildings in the sub 6 GHz, CBRS, and mmWave bands.

Key questions addressed in this study:

- What applications and services are enabled in a connected office building?
- How has COVID-19 impacted the IBW market for office buildings?
- How much will be spent to build and operate sub 6 GHz, CBRS and mmWave IBW systems in U.S. office buildings from 2020 to 2025?
- What technologies are required for a smart office building?
- What are 5G, CBRS, and MmWave, some of the technologies and spectrums that will support cellular IBW?

This market study is recommended for:

- Mobile operators, particularly those servicing the U.S. market

- Mobile backhaul providers, including telcos and cable MSOs
- Wired and wireless backhaul vendors and solution providers
- Mobile OEMs, particularly those servicing the U.S. market
- Wired and wireless infrastructure vendors, particularly those servicing the U.S. market
- Financial and investment analysts.