U.S. Picocell Total Addressable Market, 2012 - 2017: *Sizing the opportunity in the enterprise*

Market Study
First Quarter, 2013

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Abstract

The heterogeneous network (het-net) of tomorrow will likely be comprised of multiple layers of small and large cells, DAS and WiFi. The small cell term is relatively new and is sometimes used in different ways. *iG*R defines a "small cell" as a low power product (relative to macrocells) that operates on licensed frequencies and functions as small, self-contained cellular base stations.

A picocell is, in essence, a larger femtocell that is deployed into a business or small venue. The typical picocell is physically larger than a femtocell, has a higher power output (between 100 to 150 milliwatts) and, consequently, has a longer range and the ability to support a larger area, traffic capacity and/or more concurrent users (between 8 to 32).

Whereas femtocells are almost exclusively deployed indoors, a picocell implementation could be indoor or outdoor. Note, too, that multiple picocells could be grouped together to serve more people. Examples of venues that might favor picocells include convention centers, hotels, office buildings, stadiums, corporate campuses, etc.

So, the central premise behind picocells is that they will (likely) be deployed to provide better indoor voice/data coverage on licensed cellular bands.

Key questions addressed:

- How does *iG*R define small cells in general?
- How does *iG*R define picocells?
- How do picocells work?
- What are the benefits of picocells?
- What are the limitations / technical challenges surrounding picocell deployments?
- What is the use case for picocells?
- Where are picocells likely to be deployed?
- How many buildings are in the U.S.?
- What are the key elements and assumptions in *iG*R total addressable market forecast for U.S. picocells?
- What is the total addressable market forecast for picocell installations in the U.S.?

Who should read this report?

- Mobile operators
- Femtocell, picocell and small cell infrastructure vendors
- Mobile network infrastructure OEMs
- Mobile network software and services providers
- Financial analysts and investors.