

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

Market Study
First Quarter, 2013





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

A Market Study

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Table of Contents

Abstract	1
Executive Summary	3
Figure A: U.S. Picocell Total Addressable Market, 2012-2017	3
Methodology	5
Picocells	6
Femtocells	6
Picocells	6
Two Similar Views on Femto-/Picocells	7
Table 1: Small Cells, according to Nokia-Siemens	7
Table 2: Small Cell Comparison, AT&T's Antenna Solutions Group	8
How Picocells Work	9
Interference	9
Figure 1: Possible Interference Sources in a Loaded Network	10
ICIC and eICIC	10
Picocell Deployments	11
Picocell Use Cases	13
Illustrating Concentrated Mobile Data Demand	13
Improvements to Voice Service	14
Location of Voice Improvements	15
Table 3: Location of Voice Improvements, Personal vs. Work Users	15
Figure 2: Location of Voice Improvements	16
Types of Desired Voice Improvements	16
Table 4: Types of Desired Voice Improvements	17
Figure 3: Types of Desired Voice Improvements	17
Actual Picocell Use Case	17
Table 5: Cost of Orange France Picocell	18
Buildings in the U.S.	19
Table 6: Buildings in the U.S., 2003	20
Figure 4: Buildings in the U.S., 2003	21
Table 7: Number of Floors per Building	22
Figure 5: Number of Floors per Building	22
Table 8: Workers per Building Category	23
Figure 6: Workers per Building Category	24
Table 9: Buildings per Floor Space Category	24
Figure 7: Buildings per Floor Space Category	25
Table 10: Floor Space by Principal Building Activity	25
Figure 8: Floor Space by Principal Building Activity	27
Table 11: Number of Buildings in the Office Category, by Floor space	27
Figure 9: Number of Buildings in the Office Category, by Floor Space	28

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Picocell: Total Addressable Market Forecast	29
Core Assumptions	29
Methodology	30
Table 12: Total Addressable Market for U.S. Picocells, 2010.....	30
Table 13: U.S. Picocell Total Addressable Market, 2012-2017.....	32
Figure 10: U.S. Picocell Total Addressable Market, 2012-2017	33
Figure 11: U.S. Picocell Total Addressable Market, 2012-2017	34
Small Cell Vendor Profiles	35
Acme Packet	35
Figure 12: Acme Packet Security Gateway.....	37
Airspan Networks	38
Alcatel-Lucent	40
Argela	42
Ericsson	45
Hay Systems Ltd (HSL).....	48
Huawei	49
ip.access	51
Figure 13: ip.access Femtocell Solution	52
Figure 14: ip.access nanoGSM Solution	53
Juni	54
Figure 15: Juni LTE Small Cell Solution with JS-500.....	55
Figure 16: Juni LTE Small Cell Solution with JS-600.....	55
Mindspeed Technologies, Inc.	56
NEC.....	58
Figure 17: NEC Femtocell Access Point Management System	60
Nokia Siemens Networks	61
Powerwave Technologies	65
Public Wireless	67
PureWave Networks	69
Quortus	71
Ruckus Wireless	72
Figure 18: Ruckus Wi-Fi to LTE Deployment Transition	74
Figure 19: Ruckus Wi-Fi Offload Solution.....	74
Samsung Electronics	76
SpiderCloud Wireless	77
Taqua LLC	79
Figure 20: Taqua Backhaul System	80
Ubee-Airwalk.....	83
Ubiquisys.....	84
Figure 21: Ubiquisys Technologies.....	86
ZTE Corporation	88
Definitions	90
General.....	90
Device Types.....	90
Services	91

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Network Technology	92
About iGR	97
Disclaimer	97

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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. *iGR* 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 *iGR* define small cells in general?
- How does *iGR* 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 *iGR* total addressable market forecast for U.S. picocells?
- What is the total addressable market forecast for picocell installations in the U.S.?

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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.

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