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New *iGR* study forecasts North American LTE metrocell spending to grow at a CAGR of 118 percent over the next five years

Study explains how LTE metrocells will be deployed in North America to meet the growing demand for mobile data

AUSTIN, Texas, September 8th, 2014 – As part of the “small cell” category, metrocells are part of the heterogeneous network (het-net) concept that many global wireless operators are moving toward in order to meet the rising demand for mobile data. This het-net approach combines Radio Access Network (RAN) upgrades, new licensed spectrum, WiFi, small cells of various types and distributed antenna systems (DAS).

By 2018, *iGR* estimates that North America’s consumption of mobile data per month will increase nearly six times over its 2013 level. The drivers of this growth include network upgrades to LTE, the use of multiple mobile devices per user, increasing mobile data usage, “bigger” content, such as video, and the increasing use of the cloud for content. Due to this growth, mobile operators are evolving their cellular-only RAN to include small cells, and specifically metro cells.

Metrocells, as defined by *iGR*, are low power single sector-channel, independent small cells that can support several hundred users. They are essentially a small, independent base transceiver station (BTS) that is often deployed on lampposts or sides of buildings to support mobile data demand in dense metropolitan areas.

“The het-net concept exists because LTE alone will not be enough to meet wireless subscribers’ demand for mobile data,” said Iain Gillott, president and founder of *iGR*, a market research consultancy focused on the wireless and mobile industry. “*iGR*’s forecast shows how LTE Metrocells will be one significant part of mobile operators’ het-net solution.”

iGR’s new market study, *North America LTE Metrocell Forecast, 2013-2018: Addressable Market, Deployments and Spending*, provides an overview of the different types of small cells, an

explanation of metrocell technical considerations, and the specific goals around future metrocell deployments. It also includes a forecast of the mobile data demand that will drive metrocell deployments. Finally, it provides five-year forecasts for the total addressable market (TAM) for LTE metrocells, the number of actual deployments of LTE metrocells, and the associated network equipment and operational expenditures for deploying LTE metrocells in the North American market.

The following key questions are answered in the new market study:

- What is a metrocell?
- How do metrocells fit into operators' evolving networks?
- Where are metrocells most likely to be located? What is their role?
- How much mobile data do end users in the U.S. consume per month?
- How much mobile data capacity will be required in the next five years?
- How many metrocells are forecast to be deployed?
- How does the forecast for actual metrocell deployments compare to the metrocell total addressable market (TAM)?
- How much would deploying these LTE metrocells cost?

The information in this report will be valuable for:

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

The new report can be purchased and downloaded directly from *iGR*'s website at www.iGR-inc.com. Alternatively, contact Iain Gillott at (512) 263-5682 or at Iain@iGR-inc.com for additional details.

About iGR

iGR is a market strategy consultancy focused on the wireless and mobile communications industry. Founded by Iain Gillott, one of the wireless industry's leading analysts, in late 2000 as *iGillottResearch*, *iGR* is now in its fourteenth year of operation. *iGR* continuously researches emerging and existent technologies, technology industries, and consumer markets. We use our detailed research to offer a range of services to help companies improve their position in the marketplace, clearly define their future direction, and ultimately improve their bottom line.

iGR researches a range of wireless and mobile products and technologies, including: smartphones; tablets; mobile wearable devices; connected cars; mobile applications; bandwidth demand and use; small cell and het-net architectures; mobile EPC and RAN virtualization; DAS; LTE; VoLTE; IMS; NFC; GSM/GPRS/UMTS/HSPA; CDMA 1x/EV-DO; iDEN; SIP; macro-, pico- and femtocells; mobile backhaul; WiFi and WiFi offload; and SIM and UICC.

A more complete profile of the company can be found at www.igr-inc.com.