

U.S. Indoor Small Cells Forecast, 2018 - 2023: The CBRS Kickstart

Market Study
Second Quarter, 2019





U.S. Indoor Small Cells Forecast, 2018-2023: The CBRS Kickstart

A Market Study

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Abstract

CBRS is a big deal. It puts an LTE signal source in the hands of anyone who can afford the equipment – and build out a network, connect to a SAS, etc. Up to now, getting a signal source (a base station or the equivalent) has been the key bottleneck slowing indoor small cell deployments.

Since the MNOs stopped funding IBW deployments, the industry has had to find new sources of funding for projects. New models have emerged from third parties that are able to fund and build IBW systems independent of the MNOs.

This market study provides a five-year forecast for indoor small cells in the U.S. Small cells run the gamut from Distributed Antenna Systems (DAS), DAS Lite, Centralized-/Cloud-RAN, picocells (enterprise small cells), femtocells (residential small cells) and cellular signal boosters.

iGR classifies any system as “indoor” or “in-building” when the majority of its nodes (sites where the antennas are placed) are inside a building. *iGR* puts stadiums in the “indoor” category, along with hotels and airports to name a few.

In this market study, *iGR* provides a forecast for the:

- Total addressable market (TAM) for indoor small cells
- Actual installed small cell nodes.

Key questions addressed in this market study include:

- What does indoor mean?
- What are indoor small cells?
- Where do small cells fit in the network?
- What are some of the perceived benefits and issues related to indoor small cells?
- What are the key drivers for using indoor small cells?
- What is the impact of edge computing and proptech on indoor small cell deployments?
- What are some of the perceived negatives and issues related to indoor small cells?
- What are the key barriers to indoor small cell adoption?
- How large is the total addressable market for indoor small cells?

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- How many indoor small cells are expected to be deployed both residentially and commercially?
- What percentage of deployed indoor small cells will use sub-6 GHz, mmWave and CBRS spectrum bands?

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.

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