

**U.S. Outdoor Small  
Cells Spending  
Forecast, 2020 –  
2025: *An integral  
part of the 5G mobile  
network***

Market Study  
Third Quarter 2021





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# **U.S. Outdoor Small Cell Spending Forecast, 2020 – 2025: *An integral part of the 5G mobile network***

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## Market Study

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# Abstract

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Small cells are small installations typically mounted on poles or other street furniture to address problems with capacity or coverage. Over the past few years, the outdoor small cell market in the U.S. has grown substantially, and *iGR* forecasts continued growth, in spite of the impact of the COVID-19 pandemic.

In this market study, *iGR* presents spending forecasts for U.S. outdoor small cells, in which *iGR* includes metrocells, remote radio heads as small cells, and outdoor DAS.

The spending forecasts are presented by spectrum (sub 6 GHz, CBRS and mmWave) and include network build spending for both TAM and “actuals”, and operational spending for both TAM and “actuals.”

Key questions addressed in this market study include:

- What are metrocells, RRHs and oDAS?
- What are the main drivers and inhibitors of the outdoor small cell market?
- What are the issues with deploying outdoor small cells in the U.S.?
- What is the regulatory environment for deploying small cells?
- What is the effect of COVID-19 on the deployment of outdoor small cells?
- How did *iGR* create its total addressable market forecast for U.S. outdoor small cells?
- How did *iGR* create its ‘actuals’ forecast for U.S. outdoor small cells?
- What is the cost to build and operate the TAM for sub-6 GHz and mmWave small cells?
- What is the cost to build and operate the actuals forecast for sub-6 GHz, CBRS and mmWave small cells?

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.