



Contact *iGR*

Iain Gillott

(512) 263-5682

iain@iGR-inc.com

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New *iGR* study forecasts the U.S. Total Addressable Market for 4G LTE Metrocells set to grow at a 240% CAGR over the next 5 years

Small cells will be part of the het-net solution to meet the rising demand for mobile data

AUSTIN, Texas, November 1st, 2012 – To meet the rising demand for mobile data, operators will need to pursue a multi-pronged approach to upgrading and backfilling for capacity and throughput on their cellular voice/data networks. This approach, which combines RAN upgrades, new licensed spectrum, WiFi, small cells and distributed antenna systems (DAS), is typically referred to as the heterogeneous network or het-net.

Metrocells, one part of the het-net, are low power, small cell sites that operate on an operator's licensed frequency to provide additional coverage and/or capacity in a given urban area. *iGR* differentiates between a metrocell and a picocell as follows: *iGR* uses 'picocell' to refer to enterprise and/or venue-specific indoor deployments of small cells that handle data (examples of venues include convention centers, hotels, office buildings and/or corporate campuses, stadiums). Metrocells are defined by *iGR* for outdoor deployments in urban areas.

Under *iGR*'s classification, there are three types of metrocells: those that operate on 3G only, 4G only and those that can operate on both. *iGR*, a market research consultancy focused on the wireless and mobile industry, believes that ultimately the bigger potential market will be for 4G metrocells, albeit by a small margin.

iGR's new market research report, *U.S. Metrocells Total Addressable Market, 2011 – 2017: Supplying Capacity Where It's Needed*, provides an overview of the total addressable market for metrocells and provides a forecast of the theoretical maximum size of the market. *iGR* expects that:

- Total addressable market (TAM) for 4G LTE metrocells in the U.S. will grow at a compounded annual growth rate of nearly 240 percent between 2012 and 2016.

- The TAM for 3G metrocells will initially grow strongly (CAGR over 99 percent between 2012 and 2014) before the opportunity declines in favor of 4G LTE deployments.
- Overall, the combined TAM for both 3G and 4G metrocells grows at a strong CAGR of 50 percent between 2012 and 2016.

“By 2016, *iGR* expects the average consumer’s consumption of mobile data in the U.S. to increase by ten times over the level in 2011,” said Iain Gillott, president and founder of *iGR*. “The mobile networks must adapt to this vastly increased demand and we see the metrocell, both 3G and 4G versions, as an important part of the solution. Our new study demonstrates the potential for metrocells in the U.S. and shows that the demand in the next five years will far outstrip the number of macro cell sites currently installed.”

The following key questions are addressed in *iGR*’s new research study:

- What is a metrocell?
- How do metrocells fit into operators’ evolving networks?
- Where are metrocells most likely to be located? What’s their role?
- How much mobile data do U.S. end users consume and/or demand?
- How much mobile data capacity will be required in the next five years?

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 entering its twelfth 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 applications; bandwidth demand and use; small cell architectures; DAS; LTE; WiMAX; 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.