

**U.S. Residential
Femtocell Total
Addressable Market,
2012-2017: *Measuring
the impact in the home***

Market Study
First Quarter, 2013





U.S. Residential Femtocell Total Addressable Market, 2012 - 2017: *Measuring the impact in the home*

A Market Study

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Table of Contents

Abstract	1
Executive Summary	3
Figure A: U.S. Residential Femtocell Total Addressable Market, 2012-2017	4
Figure B: Comparing U.S. Femtocell Installed Base Forecasts (000s), 2012 - 2017.....	5
Methodology	6
Total Addressable Market Calculation	6
Femtocells	7
Femtocells and Picocells	7
How Femtocells Work	8
Figure 1: Basic Femtocell Deployment.....	9
Figure 2: Diagram of LTE Femtocell	10
Figure 3: Possible Interference Sources in a Loaded Network.....	10
ICIC and eICIC.....	11
Femtocell Use Cases	11
Figure 4: Femtocell Use Cases.....	12
Cellular Voice at Home	14
Rating of Voice Reception in Home	14
Table 1: Rating of Voice Reception in Home.....	14
Figure 5: Rating of Voice Reception in Home	15
Qualities Considered in Home Voice Reception Rating	15
Table 2: Qualities Considered in Home Voice Reception Rating.....	15
Figure 6: Qualities Considered in Home Voice Reception Rating	16
Femtocells used at home	17
Table 3: Existence of a Femtocell in the Home	17
Figure 7: Existence of a Femtocell in the Home.....	17
Cellular Data Experience	18
Rating of Cellular Data Coverage	18
Table 4: Rating of Cellular Data Coverage.....	18
Figure 8: Rating of Cellular Data Coverage	19
Rating of Cellular Data Speed	19
Table 5: Rating of Cellular Data Speed.....	20
Figure 9: Rating of Cellular Data Speed.....	20
Improvements to Voice Service	22
Location of Voice Improvements	22
Table 6: Location of Voice Improvements	22
Figure 10: Location of Voice Improvements	23
Types of Desired Voice Improvements	23
Table 7: Types of Desired Voice Improvements.....	23
Figure 11: Types of Desired Voice Improvements	24

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Femtocell: Total Addressable Market Forecast.....	25
Core Assumptions	25
Sizing the Femtocell TAM.....	26
Table 8: U.S. Femtocell Total Addressable Market, 2012 - 2017	27
Figure 12: U.S. Femtocell Total Addressable Market, 2012 - 2017	28
Table 9: Potential People Covered by Femtocells, 2012 – 2017	28
Table 13: Potential People Covered by Femtocells, 2012 - 2017	29
Forecasting the U.S. Femtocell Install Base: Two Scenarios	30
U.S. Femtocell Forecast: Customer Retention	30
Table 10: U.S. Femtocell Customer Retention Use Case, 2012-2017.....	31
Figure 14: U.S. Femtocell Customer Retention Use Case, 2012-2017	31
U.S. Femtocell Forecast: Aggressive use for Macro Offload	32
Table 11: U.S. Femtocell Aggressive Use Case for Macro Offload, 2012-2017	32
Figure 15: U.S. Femtocell Aggressive Use Case for Macro Offload, 2012-2017	33
Comparing U.S. Femtocell Forecasts	33
Figure 16: Comparing U.S. Femtocell Forecasts (000s), 2012 - 2017.....	34
Small Cell Vendor Profiles	35
Acme Packet	35
Figure 17: Acme Packet Security Gateway.....	37
Airvana LLC	38
Figure 18: Femtocell and FSM Configuration.....	39
Alcatel-Lucent.....	41
Argela	43
Cisco	46
Figure 19: Cisco Femtocell Solution Components.....	47
Gemtek.....	48
Figure 20: Gemtek IDV-Series VoIP Gateway	50
Figure 21: Gemtek WLTF SR-Series LTE Data/VoIP/WiFi Gateway	50
Hay Systems Ltd (HSL).....	51
ip.access	52
Figure 22: ip.access Femtocell Solution	53
Figure 23: ip.access nanoGSM Solution	54
Mindspeed Technologies, Inc.	55
NEC.....	57
Figure 24: NEC Femtocell Access Point Management System	59
Nokia Siemens Networks	60
Public Wireless	64
Samsung Electronics	65
Sercomm	66
Ubee-Airwalk.....	68
Ubiquisys	69
Figure 25: Ubiquisys Technologies.....	71
ZTE Corporation	73
Definitions	75

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General..... 75
Device Types..... 75
Services 76
Network Technology..... 77
About iGR82
Disclaimer..... 82

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Abstract

Mobile network quality is of critical importance to the wireless and mobile industry. Consumers often judge the worth of a service, application or mobile phone based on their overall network experience. The quality and coverage of cellular voice remains a key issue for consumers especially given the ongoing trend toward landline replacement.

Residential femtocells are one way mobile operators can improve the quality of their subscribers' cellular voice service – primarily from the standpoint of creating or improving coverage inside a home. Most residential femtocells deployed in the U.S. today were rolled out to improve coverage for high-value customers. Moving forward, *iGR* believes that this will be the primary use case for residential femtocells, as well.

This report provides a total addressable market forecast for residential femtocells in the U.S.

Key questions addressed:

- What qualities do consumers consider when they rate the quality of the voice reception in their home?
- How do consumers rate the quality of the voice reception in their home?
- What is a femtocell?
- How does a femtocell work?
- What are the use cases for femtocells?
- What is the total addressable market for residential femtocells in the U.S.?
- How many femtocells are installed in U.S. households?
- What are the anticipated use cases for femtocells in U.S. households?
- How do these aggressive and conservative use cases impact the installed base forecast?
- How can femtocells be used to offload macro cellular network traffic?
- What are the forecasts for femtocell installation in the U.S.?

Who should read this report?

- Mobile operators

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- Femtocell and small cell infrastructure vendors
- Mobile network infrastructure OEMs
- Mobile network software and services providers
- Financial analysts and investors.

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