

**U.S. Metrocells Total
Addressable Market,
2012 - 2017:
*Supplying Capacity
Where It's Needed***

Market Study
First Quarter, 2013





U.S. Metrocells Total Addressable Market, 2012 - 2017: *Supplying Capacity Where It's Needed*

A Market Study

Published First Quarter, 2013
Version 1.0
Report Number: 1Q2013-04

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Abstract

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 are, as compared to macrocells, low power cell sites that operate on an operator's licensed frequency to provide additional coverage and/or capacity in a given area. There are three types of metrocells: those that operate on 3G only, 4G only and those that can operate on both.

This report provides an overview of the total addressable market for metrocells. As such, it provides an estimate of the theoretical maximum size of the market based on *iGR's* estimate of the increasing demand for mobile data and the supply/capacity that is capable of being provided by U.S. operators' 3G and 4G cellular data networks.

Key questions addressed:

- 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?

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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