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Mobile data usage is increasing by a factor of 70%-100% annually. To meet this demand, cellular infrastructure architectures have to fundamentally change as networks must deal with coverage, cell density, and resistance to new macro cell base station deployments ("not in my backyard"). Increasingly, small cell deployments are being used to enhance coverage. Femtocells will be used in residences and enterprises alike, and picocells will be used to provide coverage indoors and outdoors with microcells employed to cover areas where macrocells would be overkill. New In-Stat (www.in-stat.com) research predicts the retail value of small cell shipments will reach \$14 billion in 2015.

"The potential that true mobile broadband offers in personal communications, commerce, and social networking becomes a curse for mobile operators," says Chris Kissel, Senior Analyst. "Use case determines the form factor." Studies indicate that 75% of mobile broadband connections are made indoors. This means that mobile operators have to ensure QoS for subscribers in their homes, at their jobs, and at their leisure. Radio Access Network (RAN) devices have to show versatility. If thought of as small cells, RAN devices can provide access to as few as four users or as many as a thousand."

Recent research found the following:

- In 2015, the retail value of femtocells in Eastern Europe is estimated to reach \$265 million.
- Roughly 30.7 million WCDMA/HSPA residential femtocells will be shipped in 2015.
- Worldwide outdoor metropolitan picocell unit shipments will have a CAGR of 248% over the five-year forecast period.
- In 2011, the value of voice and data services hosted by small cell devices is \$3.2 billion globally.

This Market Alert is drawn from the In-Stat research, [Femtocells and Small Cells: Making the Most of Megahertz \[1\]](#) (#IN1104896GW), which provides a comprehensive review of which small cells serve best in a variety of coverage

scenarios and includes five-year forecasts and analyses of shipment numbers, installed base, and the value of equipment in small cells. Breakouts and profiles are provided:

- Forecasts by region, airlink, and mode
- Forecasts by device type: femtocell, enterprise femtocell, indoor picocell, outdoor metro picocell, and microcell
- Current small cell deployments categorized by region and small cell type
- A silicon BOM for Class1 femtocells for the years 2009-2015
- Profiles of the leading device manufacturers, chipset providers, and other ecosystem providers in small cells including AirHop Communications, Airspan, Airvana, AirWalk Communications, Alcatel-Lucent, BelAir Networks, Broadcom, Cavium, Cisco, Cognovo, CommScope, Contela, DesignArt, Ericsson, Freescale, Huawei, Intel, ip.access, Juni, Mindspeed, NEC, Nokia Siemens Networks, Picochip, Powerwave, Qualcomm, Taqua, Samsung, Texas Instruments, Ubiquisys, Wazco, and ZTE.

This research is part of In-Stat's LTE & Cellular Infrastructure service, which provides analysis and forecasts of the market for wireless broadband and communication infrastructure equipment and components, including backhaul; macro, micro, pico, and femtocell base stations, and associated semiconductors.

Related In-Stat research:

[Wi-Fi Hotspots: The Mobile Operator's 3G Offload Alternative](#) [2]

[LTE Infrastructure Rankings, by Vendor, by Mobile Operator or Service Provider, 2009-2015](#) [3]

[Cellular Contracts, Deployments, and Subscriptions, Q4'11 Results](#) [4]

[Distributed Antenna Systems Worldwide—DAS to Fill In Gaps](#) [5]

More Information on this Research

- **Title:** Femtocells and Small Cells: Making the Most of Megahertz
- **Service:** [LTE & Cellular Infrastructure](#) [6]
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- **Publication Date:** December 2011
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Links:

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