Rethink Technology Research—Small Cells

Module 2: Enterprise small cells 2014 –2020

Updated in May 2016

This module focuses on detailed analysis of the trends in deployment of small cells in the enterprise market, which is set to be the area of highest growth for this technology for the coming 2-3 years.

Deployments and installed base for enterprise small cells are forecast over five years, with breakdown by region, technology and environment. There is also analysis of how the cells will be split between those for private enterprise use, and those which are consumer-facing, as well as the rise of dual-radio cells which support both modes of use.

In addition, there is detailed analysis of the locations of the small cell deployments, from shopping malls to office buildings to downtown metrozones or stadiums, with particular focus on scenarios where there will be the need for very dense capacity. The deployments are also forecast by the vertical sector implementing them.

These forecasts provide an in-depth picture of how small cells, whether cellular-only or cellular/WiFi, will be implemented to meet the changing needs of a wide range of enterprises and public sector organizations, as well as their MNO providers.

All modules contain between 6 and 15 data tables plus regional breakdown, with accompanying commentary consisting of graphs and concise commentary on the assumptions underlying the forecasts, and the key factors driving them.

The wireless forecast included in this report is based on research on the top 40 international mobile operator groups, which account for 80% of the global mobile subscribers (IMG-40). From this representative group of operators, the macrocell and metrocell forecasts are developed.

From the starting point of a calculation of the number of cell sites already deployed worldwide, forecasts were made of the numbers of base stations that would be rolled out a) to brand new sites and b) to replace or upgrade existing sites. These deployment forecasts were then categorized by network topology, spectrum band, spectrum mode, region and other factors. The equipment deployed in each case was also surveyed and modeled.

These forecasts were based on a combination of data from:

- Detailed surveys, interviews and operator-by-operator modeling of the IMG-40 groups.
- Studies of the deployments and strategies of the top 100 4G operators, as tracked by Rethink Technology Research's quarterly surveys, interviews and desk research.
- A survey of 25 tier one operators about their detailed plans for RAN deployments to 2019.
- Input from ecosystem vendors on shipments, technology strategies and competitive landscape, also updated quarterly.

Based on the surveys of operators and vendors, it was then calculated how those cell sites would be equipped – by base station type, technology, frequency band etc, leading to a detailed unit and market size measurement.

Sample from the Report

Tables 1 and 2. New deployments and installed base of enterprise small cells

The deployment of small cells by carriers, for public access or enterprise use, will experience far higher growth in the second half of the decade than the more mature residential market, whose CAGR will be 5%. The total market growth rate in this period will be 20%, while that of the enterprise space will be 63%.

Enterprise deployments of small cells will be the main engine of growth from 2015 as some of the barriers experienced in earlier years – cost, the wait for LTE and multimode cells, issues of WiFi co-existence – are increasingly addressed by the ecosystem. This sector is far more diverse than residential or public access, with small cells deployed in a wide variety of vertical industries and locations.

Enterprise cells also split broadly between those used for private company use, and those open to the enterprise's customers (as in a retail store); and between those which are deployed and/or managed by the mobile operator (MNO), and those which are deployed and managed by the enterprise itself, or its integrator, using MNO spectrum. These forecasts exclude home offices, since a large proportion of those use their residential small cells.

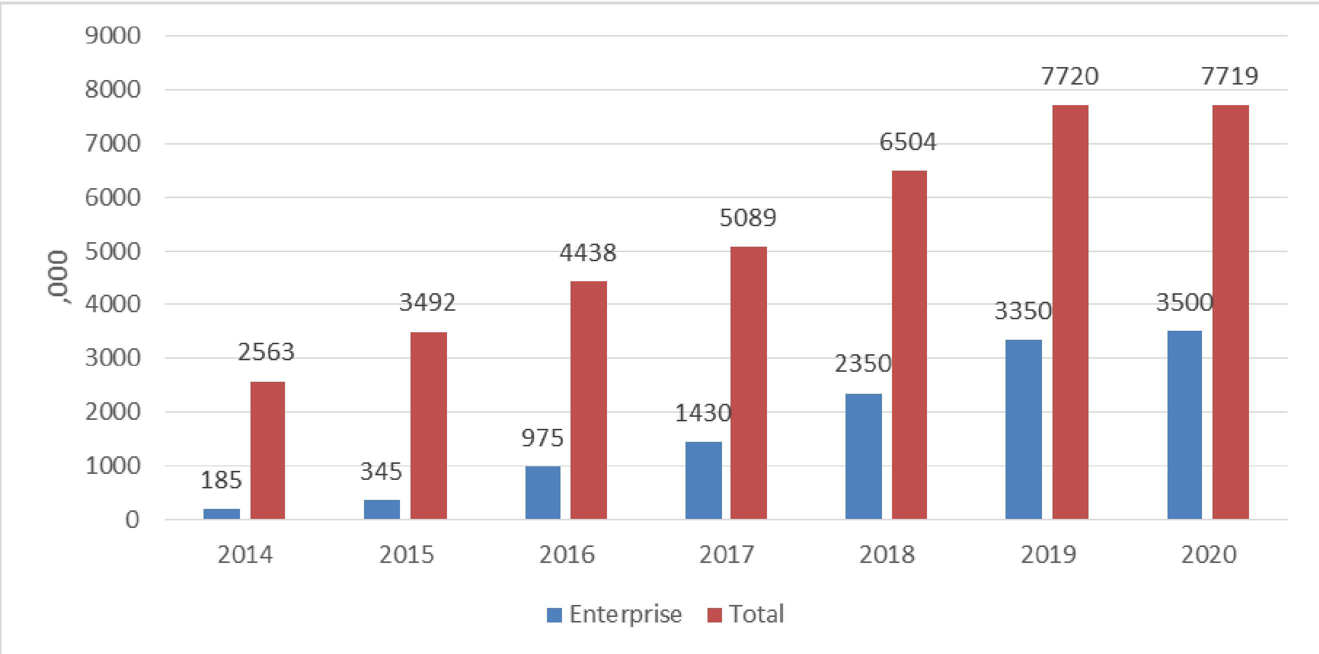

Table 1. Deployments of small cells, enterprise and total worldwide (,000s of units)

Sample from the Report

Enterprise small cell deployments and installed base 2014—2020

Who Should buy these reports

Every business which is involved with - or wants to be involved with - mobile and wireless, particularly those with an interest in RAN deployments and technologies, including small cells/HetNet and virtualization. The reports include essential information and analysis for mobile and converged operators; their hardware and software suppliers; the wider value chain, including components suppliers and vertical market integrators; as well as investors in these areas, and professional institutions whose members will be affected by the shifts and changes in these markets.

Our reports are usually purchased by senior operational executives, strategists, analysts and marketing departments.

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Module 2: Enterprise small cells 2014-2020

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Pricing Per Module	US Dollar	GBP Pound (Exc VAT)	Euro (ExcVAT)
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Single copy with updates over 12 months and a Q&A session	8,000	5,200	7,400

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