Carrier WiFi and Small Cells in LTE and Beyond: Market Opportunities and Forecasts 2012—2017

November 2012

Overview:

Driven by the growing surge for mobile broadband, carriers worldwide are investing in WiFi and small cell infrastructure as an economically efficient solution to expand network capacity and coverage.

Not only do WiFi and small cells deployments minimize network planning, redesign and real estate costs, they also allow carriers to avoid or minimize new frequency allocation costs. Small cells, in many cases, can utilize the same frequency spectrum that carriers have allocated for macro cell deployment, while WiFi access points utilize unlicensed spectrum.

The associated savings in both CAPEX and OPEX, together with higher throughout rates make WiFi and small cell deployments make WiFi and small cells a necessity for Carriers worldwide. Mind commerce, thus expects that Carrier WiFi and small cells infrastructure market will grow at a CAGR of nearly 37% over the next five years eventually accounting for nearly USD 9 Billion in revenues by the end of 2017. Nonetheless, the market still faces a number of serious challenges including but not limited to interference management, optimization and backhaul.

This report provides an in-depth assessment of the Carrier WiFi and small cells market, including business models, market drivers, challenges, value chain analysis, operator and vendor strategies, and a quantitative assessment of the industry from 2012 to 2017.

The report covers the following topics:

- **Business Case for Carrier WiFi and Small Cells:** An assessment of the business case for carrier WiFi and small cells.
- **Technology Analysis:** Evaluation of the underlying technology supporting carrier WiFi and small cell solutions
- **Carrier WiFi and Small Cell Deployments:** Analysis of major Carrier WiFi and small cell solution deployments by carriers worldwide
- **Carrier & Vendor Strategies:** Aalysis of carriers and vendors positioning to capitalize on Carrier WiFi and small cell opportunities
- **Market Analysis and Forecasts:** A global and regional assessment of the market size (unit shipments and revenues) and forecasts for the carrier WiFi and small cells market from 2012 to 2016
- **Industry Value Chain:** Analysis of the Carrier WiFi and small cells value chain with indicative revenue assessments of key market players across the value chain and predictions about the economic model evolution
- **Carrier WiFi and Small Cells Industry Roadmap 2012 - 2017:** Analysis of the roadmap for the industry from 2012 to 2017

Key Findings:

- The carrier WiFi and small cells infrastructure market will grow at CAGR of 37% over next five years, accounting for nearly USD 9 Billion in revenues by the end of 2017.
- The carrier WiFi market alone is expected to account for nearly USD 5 Billion in global revenues worldwide by 2017, growing at a CAGR of 33 % between 2012 and 2017.
- The small cells market is expected to account for nearly USD 4 Billion in global revenues worldwide by 2017, growing at a CAGR of nearly 40 % between 2012 and 2017
- The continued demand for mobile broadband services will play a critical role in maintaining the Carrier WiFi and small cell market's growth, amid a growing demand of convergent, intelligent and vendor agnostic small cell platforms by Carriers.
- Fixed line carriers are capitalizing on their infrastructure investments to offer Small Cells as a Service (SCaaS). Mind Commerce expects Fixed line carriers to form an integral part of the industry's value chain representing as much as 20% of the revenue share.

Key Questions Answered:

- How many LTE enabled small cells will ship in 2017?
- What are carrier WiFi and small cells and why are they important?
- What are carrier's attitudes towards WiFi and small cell solutions?
- How much will the carrier WiFi and small cell markets be worth in 2017?
- How much CAPEX can carriers save by deploying WiFi and small cell solutions?
- Which vendors are leading the market and what are the key strategies for vendors?
- What will be the regional outlook for revenue in the carrier WiFi and small cells market?
- How is the industry's value chain structured for WiFi and small cells infrastructure and services?
- What benefits do small cells and WiFi bring to network operators and the ecosystem as a whole?

Target Audience:

- Investment Firms
- Application Developers
- Mobile Device Vendors
- Mobile Network Carriers
- Service Bureau Companies
- WiFi Infrastructure Vendors
- Wireless Infrastructure Vendors
- Small Cell Infrastructure Vendors
- Telecom Managed Service Providers

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Table of Contents:

Table of Contents (cont.):

List of Tables

List of Figures

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