

Small Cells: -- Markets Reach \$57.8 Billion By 2024

LEXINGTON, Massachusetts (January 29, 2018) – WinterGreen Research announces that it has published a new study *Small Cells: Market Shares, Strategy, and Forecasts, Worldwide, 2018 to 2024*. The 2018 study has 248 pages, 135 tables and figures. The leading vendors in the small cell market have invested in high-quality technology and processes to develop leading edge monitoring and digital triggering activation capability.

Small Cell markets encompass virtualization, cloud, edge, and functional splits. 5G requires increasing sophistication from mobile operators. The challenge is to bring together a growing number of LTE and 5G radio access technologies. A range of connectivity services are needed. Associated APIs are needed in each small cell to manage connectivity to a number of customer segments.

Figure 1. Small Cell Market Driving Forces

- Need for enabling evolution of local communications network
- Availability of fully virtualized, distributed, ultra-reliable software
- Effective software for controlling agile infrastructure
- Automation facilitates large-scale low-cost network densification
- Lowers cost by implementing network through third-party deployments
- Effective integration of base small cell technologies
- Systems integration achieved with open and interoperable standards
- Open and interoperable standards needed to ensure competition
- open and interoperable standards needed to ensure economies of scale
- Adoption of these 5G Era technologies will require culture shifts in processes

Source: WinterGreen Research, Inc.

Small cells need infrastructure across a broad range of commercial and governmental organizations. Each have a part to play in making small cells work along with tower infrastructure to create a broadband commercial network. Service providers are focused on densification. Small cells are a critical part of the infrastructure for several key 5G Era deployment scenarios:



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Figure 2. Small Cell Infrastructure Critical Issues

- Service providers are focused on densification
- Small cells are a critical part of the infrastructure for key 5G implementations
- 5G deployment needs small cells
- >6GHz spectrum propagation limits cell sizes
- Shared and license-exempt spectrum mandates lower power
- Areas of hyper-dense broadband traffic need small cells
- Small cells meet demand in cities, stadia, transport hubs
- Scalable deployment
- Low-cost deployment
- Using a low-skilled, third-party, or end-user workforce
- Small/medium enterprises requiring self-deployed indoor coverage
- Coverage extension in rural, remote, moving and temporary deployment
- Scenarios with equipment size, weight or power constraints.

Source: WinterGreen Research, Inc.

The total value of the small cell market is \$12.5 billion in 2017, up from \$10.35 billion in 2016. Markets grow to \$58.7 billion in 2024. Growth is a result of the implementation of the tremendous amount of digital content from video on smart phones, from the digital economy, IoT, robots, drones, self-driving cars, and artificial intelligence. The digital economy rides on the back of small cells 5G signal transmission which is a 10x improvement in capacity over existing broadband. This is the new world aspect, everything is monitored and activated digitally.

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Contact:

Susan Eustis, President and Co-Author
WinterGreen Research
6 Raymond St.
Lexington, MA 02421

(781) 863-5078 (Work)

(617) 852-7876 (Cell)

susan@wintergreenresearch.com

www.wintergreenresearch.com

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