

HetNet Infrastructure Forecasts: 2016 – 2030 – Small Cells, Carrier Wi-Fi, C-RAN & DAS

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Abstracts

Driven by in-building wireless coverage requirements and the growing influx of mobile data traffic, a conventional macrocell based cellular network deployment is not deemed to be a sufficient solution to address the coverage and capacity needs of today's wireless subscribers.

Mobile operators are thus increasing their investments in Heterogeneous Network or HetNet infrastructure such as strategically deployed small cells, carrier Wi-Fi and DAS (Distributed Antenna Systems), to cope with growing capacity and coverage requirements. Adding further to the heterogeneity is the shift towards a C-RAN (Centralized RAN) architecture, which centralizes baseband functionality to be shared across a large number of distributed radio nodes. In comparison to standalone clusters of base stations, C-RAN provides significant performance and economic benefits such as baseband pooling, enhanced coordination between cells, virtualization, network extensibility and energy efficiency.

Driven by the thriving ecosystem, we expect small cell, carrier Wi-Fi, C-RAN and DAS investments to account for nearly \$13 Billion by the end of 2016. The market is further expected to grow at a CAGR of 15% between 2016 and 2020, as mobile operators remain committed to tackle the continued growth of mobile data traffic and evolving coverage requirements.

The "HetNet Infrastructure Forecasts: 2016 – 2030 – Small Cells, Carrier Wi-Fi, C-RAN & DAS" datasheet presents comprehensive market size and forecast projections for HetNet infrastructure investments from 2016 till 2030, covering 6 individual submarkets and 6 regions. Historical figures are also presented for 2015, along with vendor market share data.

Contents

FORECAST SEGMENTATION

Market forecasts are provided for each of the following submarkets and their subcategories:

SMALL CELLS

AIR INTERFACE TECHNOLOGY SEGMENTATION

2G & 3G

LTE

5G

DEPLOYMENT MODEL SEGMENTATION

Indoor

Outdoor

USE CASE SEGMENTATION

Residential

Enterprise

Urban

Rural & Suburban

CELL SIZE SEGMENTATION

Femtocells

Picocells

Microcells

SMALL CELL BACKHAUL

TECHNOLOGY SEGMENTATION

DSL

Ethernet

Microwave
Millimeter Wave
Satellite
Fiber & Others

CARRIER WI-FI

SUBMARKET SEGMENTATION

Access Points
Access Point Controllers

INTEGRATION APPROACH SEGMENTATION

Standalone Wi-Fi Hotspots
Managed Wi-Fi Offload

C-RAN

AIR INTERFACE TECHNOLOGY SEGMENTATION

3G & LTE
5G

DEPLOYMENT MODEL SEGMENTATION

Indoor
Outdoor

SUBMARKET SEGMENTATION

BBUs (Baseband Units)
RRHs (Remote Radio Heads)

C-RAN FRONTHAUL

TECHNOLOGY SEGMENTATION

Dedicated Fiber

WDM (Wavelength Division Multiplexing)

OTN (Optical Transport Network)

PON (Passive Optical Network)

Ethernet

Microwave

Millimeter Wave

DAS

DEPLOYMENT MODEL SEGMENTATION

Indoor

Outdoor

REGIONAL MARKETS

Asia Pacific

Eastern Europe

Latin & Central America

Middle East & Africa

North America

Western Europe

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