

# 3G Femtocells and Beyond

## *Opportunities & Service Scenarios in the Home 2009-2014*

Six year femtocell forecasts: best, baseline, worst case scenario - by eight key regions

This report presents three different scenarios of how the femtocells market will develop over the next six years up until 2014; best case, baseline and worst case scenario.

Key femtocells forecasts include; the number of femtocells access points shipped both for stand-alone access points and integrated access points, 3G home femtocell subscribers and femtocell service revenues split by; free calling plan, basic monthly value, new and enhanced services and incremental revenue from existing femtocells services.

Each of the femtocells projections use a twin track approach, forecasting both residential broadband subscribers and forecast of 3G subscribers. This report also includes a number of key interviews with femtocells players as well as a list of trials and profiles on femtocell vendors.

### **Key Questions Addressed by this Report:**

- How many 3G femtocells will be installed in homes by region over the next five years?
- What are the consumer 3G femtocell take-up scenarios over the next five years?
- How many consumers will use 3G femtocells by region over the next five years?
- How much service revenue will 3G femtocells in the home generate?
- What are the shipment breakdowns between standalone and integrated femtocells between 2009 and 2014?
- How will North America, Western Europe and the Far East & China compare for femtocell deployments?

### **Key Benefits:**

- A unique source of combined research and analysis for the 3G femtocells market including technologies, market characteristics and forecasts.
- Practical analysis of the emerging opportunities for vendors and operators.
- Unique insights: includes interviews of leading players with significant experience of the 3G femtocells market.
- Benefit from fresh thinking and intelligent market assessment.



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# 3G Femtocells and Beyond: Analysis & Forecasts

## report overview

This 3G femtocells report investigates the key drivers and inhibitors for the home femtocells opportunity and discusses how it will impact on the provision of mobile phone services and applications in homes across the world over the forecast period.

An investigation into which femtocells service packages will be the most lucrative is presented along with analysis of varying femtocell penetration assumptions in addition to a discussion on which regions will be the first to adopt femtocell technology.

## analysis & forecasts

### Report Analysis

**6 Year Analytical Forecasts** provide an extensive market breakdown focusing on baseline, best and worst case scenarios across key 8 key regions until 2014.

**Split by 8 Key Regions** North America; South America; Western Europe; Eastern Europe; Far East & China; Indian Sub Continent; Rest of Asia Pacific and Africa & Middle East.

**Complete Market Breakdown** combining a thorough appraisal of major driving influences and challenges, with an appreciation of market dynamics and key player interviews, vendor trials and profiles.

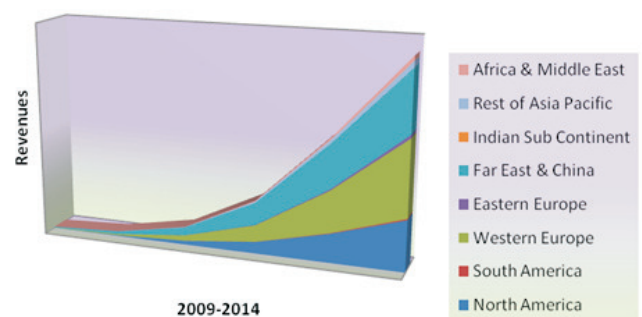
**Visual Clarity** with 53 tables and 58 colour forecast charts.

### Market Forecast Suite 2009-2014

**Access Point Shipments** standalone; integrated shipments (baseline; best case; worst case scenario)

**Access Point Pricing** standalone and integrated product types (baseline scenario)

### 3G Home Femtocells Service Revenues (\$m) Split by 8 Key Regions 2009-2014



**Access Point Market Value** standalone; integrated market; 3G subscribers; ratio of 3G consumer subscribers to residential broadband; subscriber take-up (new and enhanced service); 3G femtocell service revenues: by service package/by region (baseline; best case; worst case scenario)

**Scenario Comparison** take-up; access point shipments; market value: subscribers; service revenues (baseline; best case; worst case scenario comparison)

## our background

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## Executive Summary

### 1. Market Drivers and Challenges

#### Femtocell Technology

- Definition; Network hardware elements (chipsets; access points; gateways)

#### Recent Developments

- 3GPP release 8 standard; Interference; Business case

#### Personal Connectivity: "Always On"

#### Poor In-Building Coverage

#### Data Traffic Growth & New Services

- Orange reveals digital media boom; Cisco data traffic forecast; Growth of mobile commerce; Mobile web 2.0 - future applications and services; Video iPod ignites portable video revolution

#### Data Traffic Offload - Cost Reduction

#### Femtocell Challenges; Conclusion

### 2. Market Dynamics

#### Femto Forum Interview

- Background/history; Forum's aims; Technical considerations - interference; Femtocell standardisation; Business case; Forum targets 2009; Market issues and opportunities

#### Femtocell Trials

#### Femtocell Vendor Ecosystem

- The big picture; Ecosystem relationships

### 3. Market Forecast Approach

#### Methodology; Geography Splits

#### Residential Broadband Subscriber

#### Forecast

- Consumer 3G/3.5G/3.9G subscribers per residential broadband subscriber; Residential broadband subscribers as a percentage of total households; Residential broadband subscriber base

#### Consumer 3G Mobile Subscriber

#### Forecast

- Consumer 3G mobile subscriber base

#### Forecast Scenarios

### 4. Baseline Scenario

#### 3G Femtocell Regional Forecast

- North America; Western Europe; Far East & China and Rest of Asia Pacific
- 3G femtocell take-up and access points forecasts: take-up percentage of residential broadband subscribers; access points

#### 3G Femtocell Access Point Shipments: Units

- Standalone and integrated access point shipments
- Standalone access point shipments: Airvana HubBub UMTS; market segmentation; shipments
- Integrated access point shipments: Netgear's view of home connectivity; Netgear - multi function broadband WiFi gateway; shipments

#### 3G Femtocell Access Point Pricing

- picoChip Pc302 single-chip 3GPP femtocell; pricing for standalone and integrated product types

#### 3G Femtocell Access Point Market Value

- Standalone and integrated access point market; Standalone access point market; Integrated access point market
- Femtocell subscribers: 3G; ratio of 3G consumer to residential broadband subscribers; new and enhanced service (subscriber take-up)
- 3G femtocell service revenues: package types and pricing; service revenues by service package/by region

### 5. Best Case Scenario

#### 3G Femtocell Take-up

- Take-up percentage of residential broadband subscribers; Access points

#### 3G Femtocell Access Point Shipments: Units

- Standalone and integrated access point shipments
- Standalone access point shipments: shipments
- Integrated access point shipments: shipments

#### 3G Femtocell Access Point Market Value

- Standalone and integrated access point market; Standalone access point market; Integrated access point market; 3G femtocell subscribers; new and enhanced service (subscriber take up)
- 3G femtocell service revenues: by service package/by region

### 6. Worst Case Scenario

#### 3G Femtocell Take-up

- Take-up percentage of residential broadband subscribers; Access points

#### 3G Femtocell Access Point Shipments: Units

- Standalone and integrated access point shipments
- Standalone access point shipments: shipments
- Integrated access point shipments: shipments

#### 3G Femtocell Access Point Market Value

- Standalone and integrated access point market; Standalone access point market; Integrated access point market; 3G femtocell subscribers; new and enhanced service (subscriber take up)
- 3G femtocell service revenues: by service package/by region

### 7. Scenario Comparison and Analysis

#### 3G Femtocell Take-up

- Take-up percentage of residential subscribers (scenario comparison)

#### 3G Femtocell Access Points Scenario Comparison

#### 3G Femtocell Subscribers Scenario Comparison

#### 3G Femtocell Service Revenues Scenario Comparison

103 Pages



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## author profile

Howard Wilcox is a Senior Analyst with Juniper Research and is a regular conference speaker.

Howard has over twenty five years' experience in the Telecommunications sector, including Director of Industry Intelligence at Marconi,. Howard has a BA in Business Administration with French from Loughborough University, and a Postgraduate Certificate in Management Development from Coventry University.

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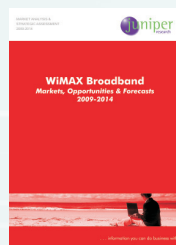
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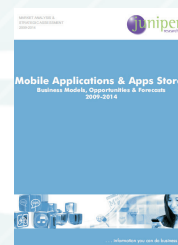
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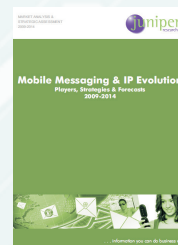
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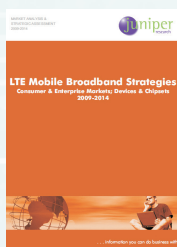
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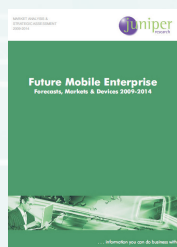
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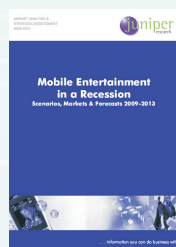
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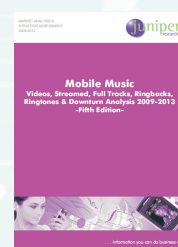
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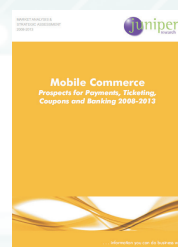
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