

# 98% of mobile operators say small cells essential for future of networks

LONDON, UK: Informa Telecoms & Media has issued its latest quarterly small-cell market status report, which includes the results of a survey showing that 98% of mobile operator respondents believe small cells are essential for the future of their networks. Interest continues to grow in public-access small-cell deployments as well as integrated Wi-Fi and LTE.



The report also highlights significant new technological progress with operators announcing major public access deployments and the first dual-mode LTE/3G devices while important progress is also being made towards integrating small cells and public Wi-Fi. There are now 46 small-cell deployments by operators, including nine of the top 10 operators by revenue globally.

The report includes a case study of a groundbreaking new '3G hotspot' service from Vodafone Greece which provides its customers with a free data service when connected to certain public access small cells in retail locations. The report evaluated progress made by Virgin Media, which has won a deal to roll out metrocells in several UK cities that will initially support only Wi-Fi but could support cellular in the future. It also assessed developments from NTT DoCoMo, which launches the world's first dual-mode LTE/3G femtocell this month, and AT&T, which announced it will start rolling out 40K public access small cells in 1Q13 - Verizon and Sprint are expected to follow imminently. It also noted that SFR, which has aggressively rolled out free femtocells to its customers, is extending the offer to its low-cost 'Red' brand showing that the technology is being extended to all customers, not just those on higher tariffs.

## Progress made in integrating Wi-Fi hotspots and small cells

The report also looks at the progress that has been made in integrating Wi-Fi hotspots and small cells. The Small Cell Forum and Wireless Broadband Alliance (WBA) announced that they will work together to intelligently integrate small cells and Wi-Fi to improve quality of service, lower costs and simplify deployment. Additionally, Cisco announced it is to start building small cells for the first time and these will ultimately support 3G, LTE and integrated carrier Wi-Fi.

The survey conducted for the report also found that 55% of the mobile operator respondents are most interested in public access deployments over the next 12 months followed by enterprise rollouts with 35% of responses. Almost half (49%) of operators said their greatest concern surrounding outdoor metro deployments are the planning issues (e.g., finding suitable sites, power, etc), followed by backhaul challenges - cited by 35%.

Almost all the survey respondents believe that LTE will be the biggest technology driver for small-cell deployments over the next five years although interest in LTE-A is growing. The survey also found that Wi-Fi was deemed to be complementary to small cells with deployments of both expected to take place in parallel.

"Our research shows that operators now regard small cells as essential to the future of their networks. Furthermore, their attention over the next 12 months is centring on the public-access models which have been undergoing intense trials this year and will turn into widescale deployments in 2013 - AT&T looks set to lead this trend," said Dimitris Mavrakis, principal analyst at Informa Telecoms & Media. "With public deployments set to start in earnest, the next major stage in small-cell evolution surrounds the effective incorporation of Wi-Fi. Although this technology is being added to new models, there is work to be done to ensure that traffic is managed across all radio types intelligently. We're seeing this work start in the Small Cell Forum and WBA - the fact that Cisco is now building small cells incorporating Wi-Fi can only help this movement."

## **Notes:**

The survey conducted for the report had 280 respondents from around the world, although focused on Asia, Europe and North America and more than 30% of whom were operators. Informa Telecoms & Media independently researched and produced this report for the Small Cell Forum (@smallcell\_forum). The report is updated on a quarterly basis and is published free of charge on the Small Cell Forum's website here - <http://bit.ly/A7w7ik>.

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