



The World Femtocell Market 2009-2013

Market & Data Reports

This report provides an overview of the latest trends in the emerging Femtocell market – Eur 875 million in revenues for Service Providers by 2013 - and examines how mass market deployment levels will be reached and what hurdles must first be overcome. It provides an analysis on roll out strategies, Femtocell standards, network connection methods and the scope for reduced operator costs and increased revenues.

Key questions

- Which Femtocell trends and roll-out scenarios for 2013?
 - What are the region discrepancies?
 - What type of operators are the best positioned to deploy Femtocells? And what strategies to adopt?
 - What are the values of Femtocell perceived by service providers?
 - What are the values of Femtocell perceived by end-users?
 - Which issues have to be overcome before mass Femtocell roll outs are possible?
- > Database (Excel): World, Europe, North America, Asia Pacific USA, Canada, France, Germany, Italy, Spain, UK, Japan, Malaysia, Singapore, South Korea, Taiwan





Femtocells

The World Femtocell Market 2009-2013

1. Executive Summary

2. What is Femtocell?

- 2.1. Femtocell Description and Architectures
- 2.2. Femtocell Ecosystem
 - 2.2.1. Femtocell Value Chain
 - 2.2.2. Player Topology
 - 2.2.3. Standardisation Body and Consortium

3. Operator Profiles

Each operator profile includes:

- Femtocell Products
- Recent Femtocell Activities

- 3.1. AT&T
- 3.2. ChungHwa Telecom
- 3.3. Maxis
- 3.4. NTT DoCoMo
- 3.5. O2 Telefonica
- 3.6. Orange France & UK
- 3.7. SFR
- 3.8. Softbank
- 3.9. Sprint
- 3.10. T-Mobile
- 3.11. Verizon
- 4.12. Vodafone

4. Vendor Profiles

Each vendor & chipset vendor profile includes:

- Femtocell Products
- Recent Femtocell Activities

- 4.1. Alcatel-Lucent
- 4.2. Airvana
- 4.3. Airwalk
- 4.4. Ericsson
- 4.5. Huawei Technologies
- 4.6. ip.access
- 4.7. Kineto Wireless
- 4.7. Motorola
- 4.8. NEC
- 4.9. Netgear
- 4.10. Nokia Siemens Networks
- 4.11. RadioFrame Networks
- 4.12. Samsung Electronics
- 4.13. Thomson
- 4.14. Ubiquisys
- 4.15. ZTE
- 4.16. PicoChip
- 4.17. Texas Instrument

5. Drivers

- 5.1. Technologies
 - 3G Femtocell architecture standardisation
 - Macro cell traffic reduction
 - Interferences
 - Network management
- 5.2. Market trends
 - 5.2.1. Broadband penetration rate
 - 5.2.2. Mobile penetration rate
- 5.3. Regulatory Factors
 - Backhauling, Femtocell Registration,...
- 5.4. Usage Factors
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 - Tariffs for indoor usage, Data Usage
 - Alternative to a 2nd computer
 - Family Plan
 - Customer Acquisition
- 5.5. Alternative Solutions
 - Fixed-Mobile Substitution offers
 - Fixed-Mobile convergences solutions
- 5.6. Financial impacts
 - Backhaul and energy costs savings
 - Data usage
 - Economies of scale

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- 6.1. Value perceived by the end-user
 - Service Providers should segment the market
 - End-Users Value Propositions
 - Subsidisation Level per Customer Segment
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- 6.3. Which type of service providers will push/hold femtocells and why?
 - 6.3.1. Fixed Players: out of the frame
 - 6.3.2. Mobile Players: into the household
 - 6.3.3. Integrated Players: the winners

7. Strategies

- 7.1. Femtocell Operators' Strategies
 - Coverage, Capacity
 - Business Models, Targeted end-users
- 7.2. Femtocell Vendor Strategies

8. Market Forecasts

- by zone and country: World, Asia, North America, Western Europe
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- 8.2. Femtocell Units Shipped Forecast
- 8.3. Femtocell CAPEX Forecast
- 8.4. Femtocell Revenue Forecast

Database (Excel)

- Markets & Forecasts by country

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Database (Excel)

Regions & Countries

- **Europe**
 - France
 - Germany
 - Italy
 - Spain
 - United Kingdom
- **North America**
 - Canada
 - USA
- **Asia Pacific**
 - Malaysia
 - Japan
 - South Korea
 - Singapore
 - Taiwan

Market data & Forecasts

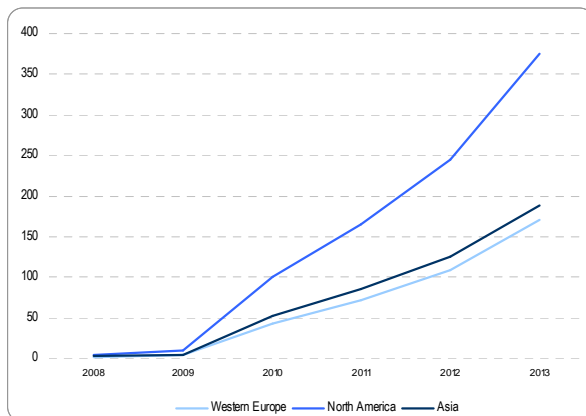
- **2008-2013**
 - Femtocell Capex
 - Femtocell Revenues
- **2006-2013**
 - Population
 - 2G subscribers:
 - Total and by Operator
 - 3G subscribers:
 - Total and by Operator
 - 2G Mobile subscribers penetration
 - 3G Mobile subscribers penetration
 - Total Mobile subscribers penetration
 - Fixed broadband subscribers:
 - Total and by Operator
 - Fixed broadband access penetration

Methodology

In order to evaluate Femtocells market evolution over the next 5 years, we consider a panel of relevant criteria:

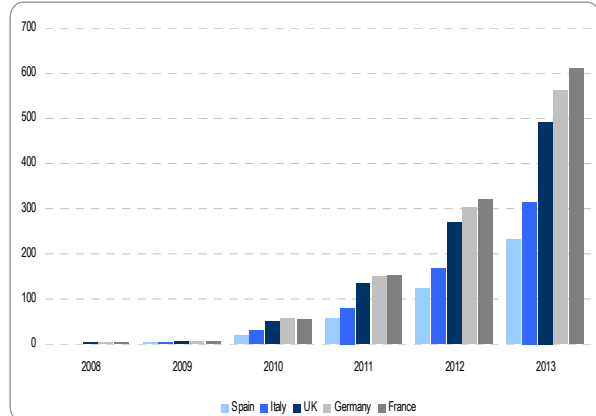
- Indoor Coverage
- Femtocell Trial Announcements
- Triple Play Offer Ratio
- Mobile Data % of Revenue
- Convergent Operator Ratio
- 3G Share
- Mobile Penetration

Femtocell CAPEX Trends by Regions



Source: IDATE

Femtocell Units Shipped (000) - Western Europe



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