

# Mobile Broadband Access at Home: The Business Case for Femtocells, UMA and IMS/VCC Dual Mode Solutions

Worldwide Market Analysis, Strategic Outlook & Forecasts to 2013

## EXCLUSIVE

A comprehensive analysis of femtocells, UMA, and IMS/VCC in one authoritative report

**NEW AND EXCLUSIVE** to Informa Telecoms & Media, Mobile Broadband Access at Home strategic report provides you with a complete deployment, traffic and cost analysis and evaluates the business case for different solutions of mobile access at home.

## This report is packed with invaluable market intelligence:

### Detailed and granular market forecasts to 2013

Make fully informed strategic decisions and support your business planning with comprehensive forecasts by market segment, technology, and region.

### In-depth trend analysis

Review the potential and maturity level of different enabling technologies and assess different implementation scenarios taking into account market demand, involvement of key players, partnerships, standardisation and regulation issues.

### Expert future outlook

This detailed assessment of the sector identifies which vendors will succeed and which technologies will prevail, as well as quantifying the opportunities and threats emerging along with different Mobile Access at Home solutions.

**An invaluable insight** into deployment scenarios of femtocells and alternative technologies to support different mobile network technologies.

### Independent case studies

Understand the market drivers behind using femtocells, dual-mode UMA or IMS/VCC solutions and evaluate the major strategies by operator type, equipment supplier, and device vendor.

### Detailed operator and vendor profiles

This inclusive analysis, with more than 30 company profiles, provides detailed SWOT analysis of innovators and followers among operators and vendors, highlighting their strategies for launching Mobile Access at Home products & services.

[See inside for more details on this report](#)



# Mobile Broadband Access at Home:



## WHO SHOULD READ THIS REPORT?

Mobile, fixed and hybrid operators and service providers:

- Evaluate and quantify the opportunities and threats emerging with femtocells and dual-mode UMA and IMS/VCC solutions.
- Learn from early services experience and understand how to overcome challenges
- Evaluate the wider strategic impact in the context of FMC and fixed mobile substitution
- Gain an in-depth understanding of the benefits and costs involved
- Understand the key market drivers, the business case and the major strategy options
- Assess the technologies enabling different Mobile Access at Home solutions and the suppliers providing them
- Analyse partnership opportunities within equipment suppliers and device vendors
- Examine major competitors' strategies

Network, device and software vendors:

- Understand the business proposition of Mobile Access at Home Services and assess new market opportunities for development
- Assess addressable markets for different Mobile Access at Home opportunities including dual-mode WiFi-Cellular services and femtocells based services
- Identify key players, potential partners and their evolving roles in the service value chain
- Monitor the competition and draw winning strategic plans accordingly

Consultants, analysts, industry forums, regulators and venture capitalists:

- Discover the unbiased, reasoned hard facts free from industry hype
- Ascertain the impact of Mobile Access at Home solutions on the telecoms landscape
- Utilise clear, useable business intelligence to support your recommendations to clients

Although vendors may claim that the majority of the technical issues related to femtocells and alternative technologies have now been resolved and these technologies are now ready to make their way into the market, there are several other barriers for their mass deployment– the majority of which relate to the business case in deploying them, the cost of associated CPEs, and the value proposition to the end-user. Operators must address these issues in the early stages of deployment in order for enabled services to be rolled out with the least amount of unforeseen barriers.

“ As the telecommunications market is moving towards convergence, operators are seeking new business opportunities while trying to find the best possible solutions to optimise both capital and operation investments. One of the main challenges of this rapidly changing landscape is to manage the explosive mobile data traffic growth generated by future mobile broadband services. Femtocells and alternative technologies could help mobile operators to offload a large part of this traffic to the subscriber fixed line, which could potentially lead to significant savings in the network capacity upgrade while enabling considerable improvement of both coverage and capacity of mobile broadband access in the home environment. ”

Malik-Kamal Saadi, Principal Analyst

## KEY CASE STUDIES INCLUDE:

Operators	Infrastructure & CPE vendors	Femtocell vendors
Sprint Wireless	Nokia Siemens Networks	ip.access
NTT DoCoMo	Alcatel-Lucent	Ubiquisys
Vodafone	Huawei	Airvana
T-Mobile USA	Ericsson	Airwalk
T-Mobile International	Motorola	RadioFrame Networks
TeliaSonera	Sonus Networks	Continuous Computing
Softbank	NEC	Picochip
AT&T	Kineto Wireless	
Telefonica/O2	ZTE	
Orange	SAGEM	
BT		
Standard bodies and Forums		
3GPP	GMN	
3GPP2	Femto forum	GSMA

## EXPERT FORECASTS IN THIS REPORT

You need to base your business decisions on the best possible information. This report's forecasts have been produced by the Informa Telecoms & Media expert forecasting team using the most comprehensive market database for the global telecommunications market. Our relationships with the key market players mean that the quality of data we publish is the most authoritative and consistent available.

# The Business Case for Femtocells, UMA and IMS/VCC Dual Mode Solutions

This strategic report is packed with essential information that you can't be without...

- ✓ Mobile broadband networks capacity and coverage issues mainly at home
- ✓ Femtocells, UMA and IMS/VCC dual-mode solutions for enabling value added services
- ✓ Technology & standardisation issues
- ✓ The role of different solutions in the multiplay fixed-mobile services
- ✓ Mobile traffic assessment by geo-type, residential and non residential areas
- ✓ Traffic offload analysis and the role of femtocells
- ✓ Analysis of femtocell economics and cost savings

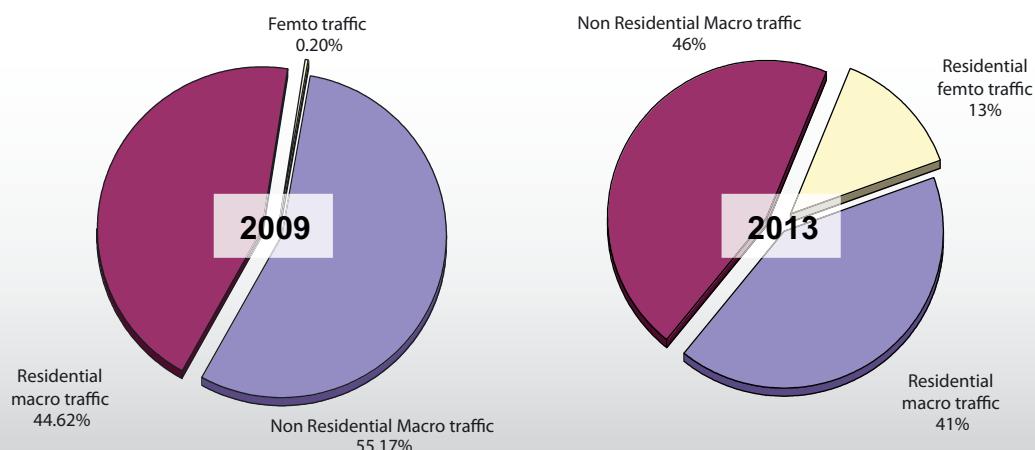
## KEY FORECASTS IN THIS REPORT TO 2013

- » Femtocell devices (stand-alone vs integrated)
- » Femtocell users and devices by region and by wireless technology
- » Femtocell price evolution
- » UMA and IMS/VCC users and devices by region
- » Traffic distribution by geo-type and by region
- » Traffic across Macrocell vs traffic across femtocell by region
- » Cost savings analysis and forecasts by mobile access technology

## THIS REPORT ANSWERS BUSINESS-CRITICAL STRATEGIC QUESTIONS:

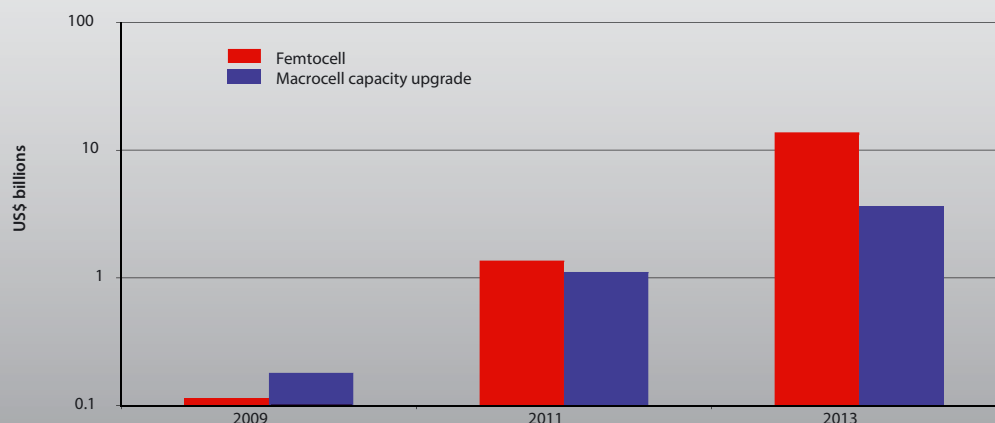
- ✓ What is the business case for mobile access at home including femtocell and dual mode solutions?
- ✓ What is the value proposition to consumers?
- ✓ What are the main technical and regulatory challenges?
- ✓ What is the level of engagement of different players in the value chain including operators, equipment manufacturers, and device vendors?
- ✓ What is the evolution of the standardisation process?
- ✓ What is the position of femtocells in the mobile broadband ecosystem?
- ✓ Femtocell solutions: the integrated approach vs. the stand alone; who are the winners?
- ✓ What is the tipping point when femtocells solutions become cost effective?
- ✓ Why should operators consider MAH solutions and how much is it going to cost them?
- ✓ Do femtocells really provide a cost-effective way to increase capacity and coverage?

## TRAFFIC DISTRIBUTION



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## FEMTOCELL COST SAVINGS COMPARED TO MACROCELL CAPACITY UPGRADE



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\*Contents correct at time of printing

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## Networks Intelligence Centre

### Intelligence for network investment, implementation, and optimisation issues

The Networks Intelligence Centre focuses on networks, infrastructure and related technology developments in the mobile and convergent telecoms value chains. The main emphasis is on access networks and technologies supporting advance applications and services as well as network outsourcing and managed services.

For a detailed breakdown of the content in this Intelligence Centre visit [www.intelligencecentre.net/networks](http://www.intelligencecentre.net/networks)



## Mobile Broadband Devices: Opportunities for mobile handsets, MIDs, UMPCs and notebooks

Mobile Broadband Devices examines the technology and business drivers shaping this nascent market and evaluates the likely outcomes for its diverse device segments and addresses key questions including:

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## Mobile Networks Forecasts: Future Mobile Traffic, Base Stations & Revenues

Mobile Networks Forecasts: Future Mobile Traffic, Base Stations & Revenues details how the rise of mobile Internet applications running on mobile broadband networks is sparking a traffic boom that will transform mobile networks, vendors and operators. PLUS our Interactive Forecasts companion tool provides even more comprehensive forecasts than in the report, in one easy to use excel sheet.

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## Mobile Converged Devices: Enabling IMS, SIP, UMA & VCC services

This comprehensive report provides you with a technology roadmap towards full mobile converged services integration and deployment, including analysis of the mobile converged devices market through detailed forecasts of key market segments.

For more information and to download a FREE table of contents visit [www.informatm.com/convergeddevices](http://www.informatm.com/convergeddevices)



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# About the Authors

**Dr Malik Kamal-Saadi** is a Principal Analyst at Informa Telecoms & Media. He has planned, authored and co-authored many Informa Telecoms & Media reports, including Mobile Converged Devices, Future Mobile Broadband, IP Multimedia Systems (IMS), Mobile Applications Platforms & Operating Systems, Future Mobile Handsets, Open Source in the mobile market, Mobile VoIP, Future Mobile Computing, and Metropolitan Area Networks and Switching Technologies. Malik has considerable experience in the telecommunications industry, focusing on the development of related technologies and markets.

**Dimitris Mavrakis** is an author of Future Mobile Broadband: Revenue Opportunities for HSPA to LTE, EV-DO to UMB & WiMAX and an Associate Analyst at Informa Telecoms & Media. Dimitris has a BEng in Telecommunications Engineering and a PhD in Mobile Communications. Dimitris is an author of other Informa reports including IMS Opportunities and Challenges and Future Mobile Computing. He has also carried out many consultancy projects for leading mobile operators and vendors.

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