

**U.S. DAS Total
Addressable Market,
2012 - 2017: *The Large
Building and Venue
Opportunity***

Market Study
Second Quarter, 2013





U.S. TAM Total Addressable Market, 2012 - 2017: *The Large Building and Venue Opportunity*

A Market Study

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Abstract

Distributed Antenna Systems (DAS), as part of the heterogeneous network concept (HetNet), are one option for mobile operators as they seek to supply enough licensed-spectrum capacity to deal with peak data demand, as well as provide coverage, throughout buildings and stadiums.

DAS is a wireless telecommunications architecture that is characterized by multiple antennas connected to processing units that are geographically distributed throughout a network. DAS requires an antenna/repeater and cellular base station to provide a RF signal throughout a building or area DAS.

DAS systems are typically deployed to improve both the voice and data coverage on licensed cellular bands in office buildings, as well as in venues with a particularly high density of users such as stadiums and convention centers. Many sports arenas across the U.S. have installed DAS to improve the wireless service for guests.

This *iGR* market study defines DAS architecture, overviews use cases, provides profiles of 23 DAS vendors, and gives a five year forecast for the total addressable market for DAS.

Key questions addressed:

- What is the DAS architecture?
- How do DAS and small cells compare?
- What is the difference between neutral DAS and single host DAS?
- What are the challenges that surround a DAS deployment?
- What are the advantages provided by DAS?
- What are the typical use cases for DAS?
- What improvements do U.S. consumers want in their cellular voice coverage and how might DAS help provide these improvements?
- What are the key elements and assumptions in *iGR*'s total addressable market forecast for DAS?
- What is the five year total addressable market forecast for DAS systems in both commercial buildings and multi-dwelling units (MDUs)?
- What is the five year total addressable market forecast for DAS nodes in both commercial buildings and multi-dwelling units (MDUs)?

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Who should read this report?

- Mobile operators
- DAS vendors and solution providers
- Mobile network infrastructure OEMs
- Mobile network software and services providers
- Financial analysts and investors.

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