DASpedia

# In-Building Industry Update

Seth Buechley
CEO

Priority RF

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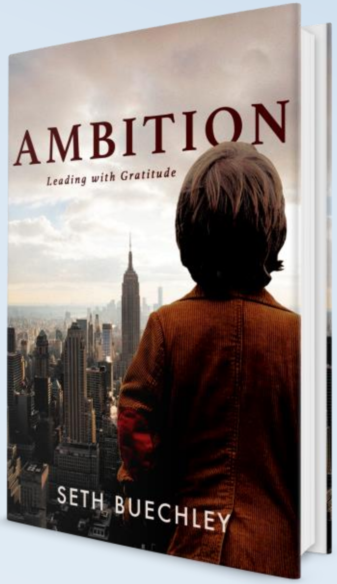
THE STRUGGLE
IS REAL


AMBITION
Leading with Gratitude
SETH BUECHLEY

- Priority RF Introduction
- Historical Overview
- Industry Trends
- Carrier Spending
- Path Forward


## In-Building Industry Update

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- Consultancy focused on In-Building Wireless Infrastructure – Cellular and Public Safety
- Originators of the ***Shared DAS ™ Model***
  - Guides Property Owners and Managers through In Building Wireless Planning, Funding, Development, and Operation

CATHEDRAL CONSULTING GROUP, LLC Est. 2004

SAFER BUILDINGS COALITION Member

# Priority RF Introduction

# Historical Overview – Early Trends

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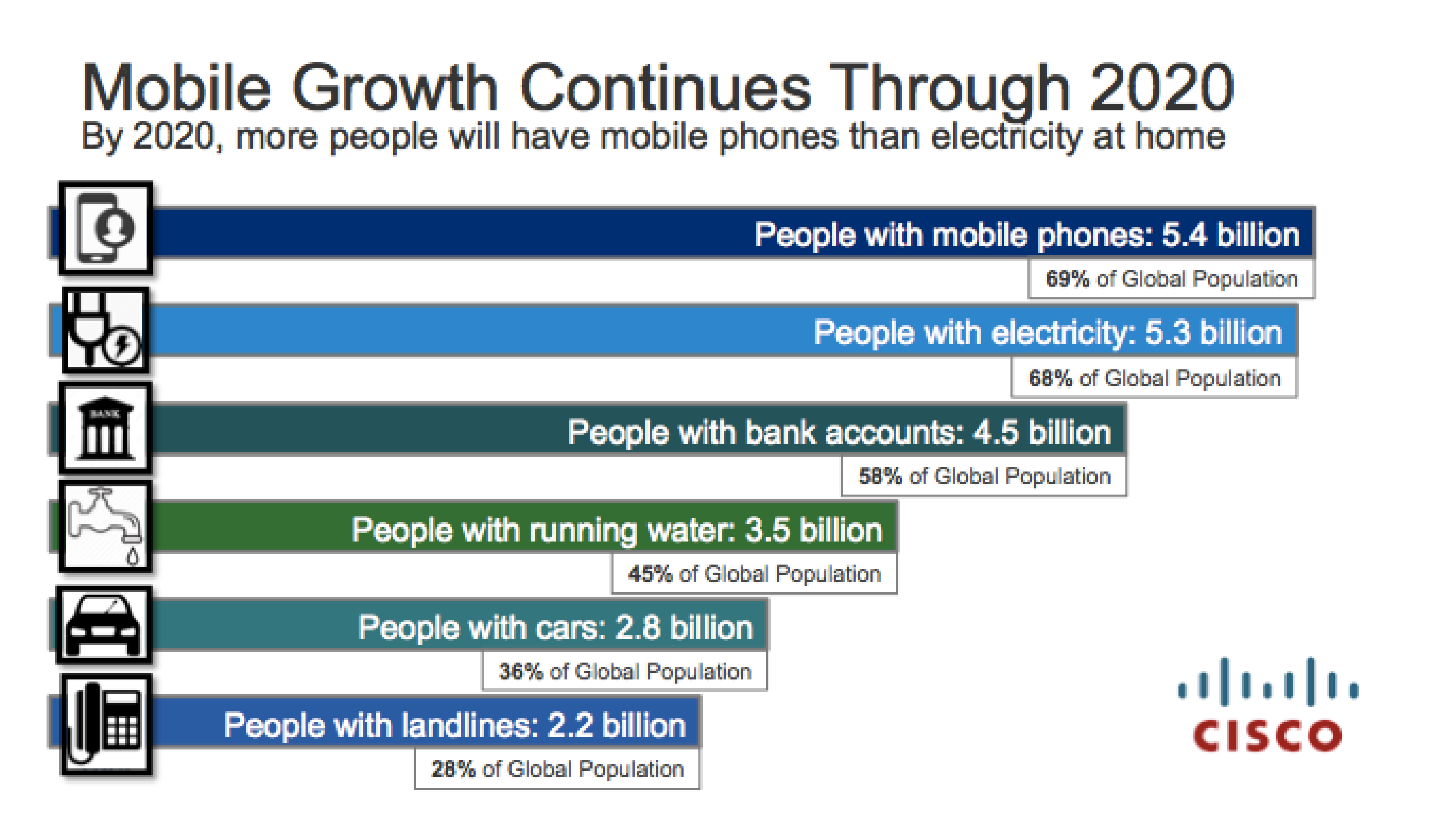
- Technical
  - Voice - > Voice and Data
  - Mostly Outdoor -> Mostly Indoor
  - Coverage -> Coverage and Capacity
- Business
  - Continued Growth of Wireless Usage
  - Carrier funded, owned, and operated
  - Enter Third Party Operators
  - Predominantly Cellular – little Public Safety
  - OEM Acquisitions by Connectivity Players




# Industry Trends – Continued Global Growth

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# Industry Trends

- Densification
  - More Nodes - Higher Data Rates - Manage Interference
- Changes in Carrier Spending
- Owner / Enterprise-Funded Systems
- Technology Options:
  - DAS, Small Cell, E-RAN, Femto, 5G?
- Public Safety taking Center Stage
- Spectrum – Band Changes
- IoT - Machine to Machine
- Network Virtualization – Shift from H/W to S/W

- Wireless Carrier Competition
  - Promotions, Pricing, Data Plans
- More Data, Streaming Video
- BYOD, Enterprise Reliance on Mobile Wireless
- Densification
  - Carriers Acquiring and Building Fiber
  - In-Building and Outdoor Small Cell
  - New Spectrum
  - 911 Location
- Embedded Devices – IoT


# Drivers

- Mergers and Acquisitions – Consolidation and Content
  - AT&T & DirecTV • Verizon & Yahoo • Sprint & Tidal Streaming
  - Comcast, Google Entering Wireless Market?
  - T-Mo / Sprint in play? Merger?
- New Administration
  - Regulatory (FCC) Changes
  - Infrastructure Investment
  - M&A Approvals


# Drivers - Continued

- 3PO's, OEM's, Distribution, and Integrators Report Lower Carrier In-Building Spend Trailing 24 Months
- Carriers want more coverage for less money
  - "Middleprise", E-RAN technology
- Carriers frustrated with 3PO costs
  - Long Term Contracts, Escalators, Markups
- Big Venues still command best deals
- CAPEX OK, Less OPEX
- Tier 1B Venues - good demand

# Changes Observed in Carrier Spending

- Develop Agile Partnerships – Leverage Ecosystem
- Help Building Owners and Managers Maintain Financial and Technical Control
- Help Carriers Reduce Costs, Expand Coverage and Capacity
- Develop Solutions for In-Building Public Safety
- "Future-Proof": Create Flexible Options
  - Invest in Fiber, Pathway, Space
  - Modular / Expandable Systems
  - Broadband Passive Component
- Innovate Business and Financial Models

# Path Forward

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# Thank You!

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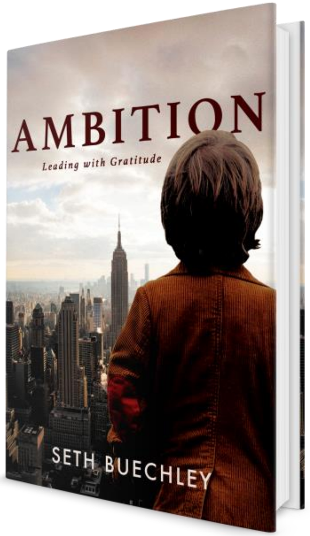


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