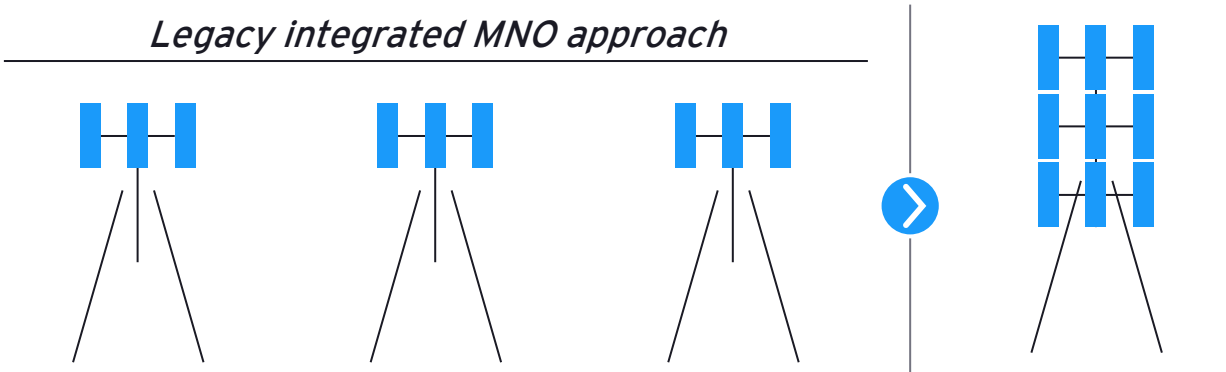
# How neutral host TowerCos strengthen Europe's wireless connectivity and competitiveness

*A report for the European Wireless Infrastructure Association - June 2025*

## Neutral host infrastructure avoids duplication, increases operating efficiency and reduces barriers for new networks

*Legacy integrated MNO approach*



**MNO 1**
1 Tower | 1 PoP

**MNO 2**
1 Tower | 1 PoP

**MNO 3**
1 Tower | 1 PoP

**Neutral Host**
1 Tower | 3 PoPs

## Halfway through the digital decade, neutral host TowerCos have contributed significantly to network rollouts, enabling downstream competition that benefits consumers

Outsourcing tower sites to Neutral Host TowerCos has increased from 13% to 69% over the past 10 years…

**13%** 2014 → **69%** 2024

…releasing capital to MNOs for further investment in 5G rollouts and network quality

**€53bn**
(2019-2024)

… and are on track to deliver predicted economic savings

**€31bn**
(2019-2029)

## There is still more to do to provide mobile data connectivity everywhere people live, work, travel and gather – we estimate the requirement at €100bn

**€100bn**

Network upgrades €35bn

Main transport route coverage €50bn

Rural landmass coverage €15bn

Of which **€25bn** TowerCo infrastructure

Source: How neutral host TowerCos strengthen Europe's wireless connectivity and competitiveness, June 2025

EY Parthenon