Tower Companies

Boosting Europe's Connectivity and Competitiveness

EWIA Manifesto

EWIA
EUROPEAN
WIRELESS INFRASTRUCTURE
ASSOCIATION

Europe's connectivity and related services - 4G, 5G, emergency, private mobile networks, internet of things, broadcasting and many other radio services - cannot exist without a dense network of tower sites, each hosting the active radio equipment covering an area.

EWIA - the European Wireless Infrastructure Association - is the European trade association of independent Towercos which provide open access to their shared wireless infrastructure.

This 'neutral host' model is now the prevalent model in Europe, where our 13 members operate 270,000 wireless infrastructure assets in 23 countries. We serve all mobile network operators (MNOs) and hundreds of other wireless operators enabling better communications for end users in the communities we cover.

EWIA members enable better and smarter connectivity

EWIA members are committed to enabling better and smarter connectivity across Europe through the investment in and the delivery of worldclass neutral-hosting wireless infrastructure and associated facilities. They provide a number of benefits to MNOs and other wireless network operators and, ultimately, Europe's economy and society.

Investment in the connectivity infrastructure for Europe's competitiveness

Investment in world-class connectivity infrastructure is a prerequisite for Europe's competitiveness as it is a driver of productivity, enables R&D opportunities in other sectors and stimulates overall economic growth.
EWIA members can raise significant capital from infrastructure funds and their own cashflow generating capacity, contributing an important part of the necessary investment in the wireless connectivity infrastructure, including 4G, 5G, standalone 5G and network densification, towards a thriving digital economy and society. Until now EWIA members have invested over 52 billion euros to support the EU's path to the Digital Decade.

More efficient Infrastructure sharing

The average number of wireless network operators hosted on assets by EWIA members is 2.1, compared with only 1.3 for towers that are still operated by MNOs and MNO subsidiaries. This avoids unnecessary duplication of tower sites, which in turns provides a series of economic and qualitative benefits.

Economic savings

Sharing towers with multiple tenants reduces overall cost. A typical location of a wireless network operator ("point of presence") managed by EWIA members is circa 40% more efficient than one managed by an MNO, resulting in projected economic savings of 31 billion euros across Europe between 2019 and 2029 to the benefit of the subsequent value chain including end consumers.

Enabling improved coverage and quality

Shared infrastructure becomes more valuable. Divesting infrastructure assets to TowerCos brings MNOs upfront capital for the Digital Decade (amounting over 42 billion euros between 2019 and 2023), which telcos can reinvest in their networks to improve broadband coverage and accelerate 5G rollouts. This specially makes network deployment in rural areas viable and helps to address the digital divide with potentially more choice for the consumers.

Environmental benefits

The open, neutral and sharing-driven TowerCo model will result in 109,000 fewer towers being built by 2030. This will avoid almost 4 million tons of CO2 emissions, which is the equivalent of taking almost 200,000 cars off the road each year.

Improved competition and innovation

By enabling timely and cost-effective access to their sites, neutral host TowerCos facilitate market entry and promote infrastructure-based competition, which leads to more consumer choice.

An investment-friendly environment in the 2024-2029 EU mandate

To maximize their positive contribution to Europe's connectivity and competitiveness, EWIA members call on policymakers to encourage investment in wireless infrastructures and leverage the pro-competitive and functioning TowerCo sector to foster the EU's digital and green transitions through adequate promotive provisions. For EWIA members, an investment-friendly environment is one which:

Protects from opportunistic and speculative behaviours regarding access to land

Support the deployment of 5G connectivity alongside the main transport paths

Provides long term regularity certainty

Provides security of existing contracts

Prioritizes commercial negotiations and regulates in an efficient manner and only if necessary

Facilitates permitting procedures, access to energy solutions, and increases transparency on emissions and site certificate data when required to expedite infrastructure deployment

Sources for the above-mentioned data include the study by EY-Parthenon "How neutral host TowerCos strengthen Europe's wireless connectivity and competitiveness" (June 2025), available on EWIA's website complemented with EWIA research.

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