



→ More towers

- white spots resorbtion
- 4G densification
- 5G small cells
- Distributed antennas



→ Fast rollout

- 5G
- Internet of Things, innovative wireless operators



→ Capital

- estimated to be between € 56 bn and € 200 bn



EUROPE needs

Connected digital single market by **2020**

Gigabit society by **2025**

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EUROPE NO. 1



→ Our wireless infrastructure

- existing portfolio
- Site creation
- Site buyback & mutualisation
- Increased sharing 2x



→ Quick and open access

- Time to market
- fibre connected small cells
- independent and neutral host



→ Long-term investment

- A new source: Infrastructure funds have \$ 160 billion to invest
- If Europe develops as the US, € 27 bn could be unlocked

Independent wireless infrastructure OPERATORS bring ...



→ A proven business model with growth potential in Europe



84% US



62% globally



20% Europe

% of towers outsourced to independent towercos

EUROPEAN WIRELESS INFRASTRUCTURE ASSOCIATION

10 members in **8** European countries

- over 60,000 assets in Europe
- over € 60 bn invested in infrastructure assets globally



OUR POLICY asks



Policies that incentivise greater independent neutral host investment



EWIA members enhance Europe's connectivity by investing long-term in high quality shared telecom infrastructure