

TowerXchange's guide to tomorrow's towerco

Matthew Edwards, Product Director, TowerXchange

Mobile World Congress, February 2024

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TOMORROW'S TOWERCO

The top adjacent service lines and asset types that towercos are diversifying into

October 2023

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TowerXchange Membership

Access the tower industry's most comprehensive resource centre and network of professionals

- Detailed market studies
- Country by country tower counts for the world's 304 towercos
- Access to webinars and working group meetings

Tower ownership in the German market

Ground based towers:

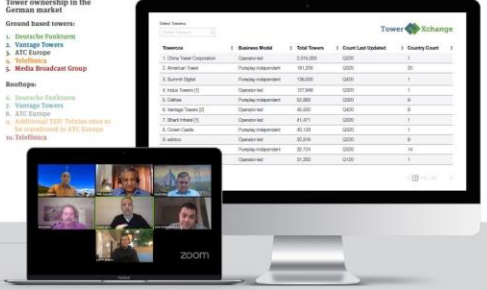
1. Towerco for Telekom
2. Towerco for Deutsche Telekom
3. ATC Europe
4. Telefield
5. Media Broadcast Group

Booths:

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Country by country tower counts for the world's 304 towercos

Country	Market Value	Total Towers	Count Last Updated	Country Count
1. USA	\$2,000,000	10,000	2023	10
2. Europe	\$1,500,000	8,000	2023	8
3. Asia	\$1,000,000	6,000	2023	6
4. Africa	\$500,000	3,000	2023	3
5. Australia	\$300,000	1,500	2023	1



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THE TOP 20 TOWER INDUSTRY EXECUTIVES 2023

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2024/25 TowerXchange's Meetups



8th Annual TowerXchange Meetup Europe

 23 - 24 April 2024 | London, UK
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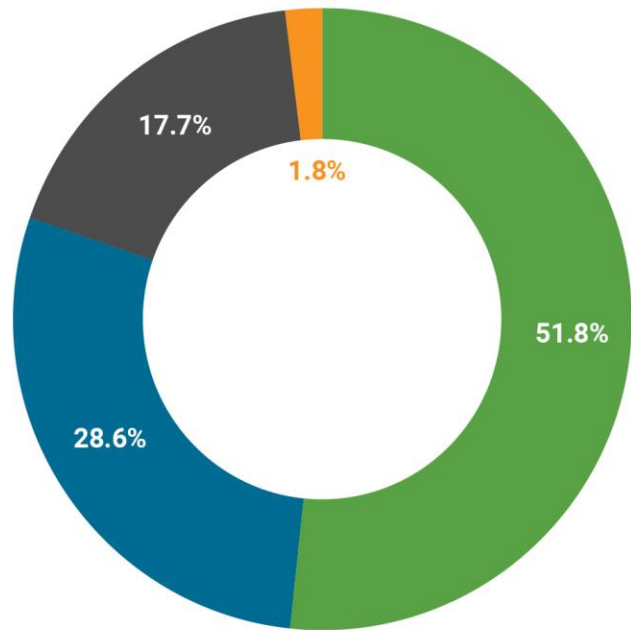
 TOWER LEAGUE TABLE



TowerXchange is now tracking 324 towercos who between them own 3.87mn of the world's 5.33mn investible towers and rooftops (72.6%)

Rank	Company	Business Model	Towers	Geographical footprint	Country code	Last updated
1	China Tower Corporation	Operator owned	2061000	China	1	Q423
2	American Tower	Pureplay independent	225875	Argentina, Australia, Bangladesh, Brazil, Burkina Faso, Chile, Colombia, Costa Rica, France, Germany, Ghana, India, Kenya, Mexico, Niger, Nigeria, Paraguay, Peru, Philippines, South Africa, Spain, Uganda, USA	23	Q423
3	Indus Towers	Operator owned	204212	India	1	Q423
4	Summit Digitel	Pureplay independent	175000	India	1	Q423
5	Cellnex [1]	Pureplay independent	106895	Austria, Denmark, France, Ireland, Italy, Netherlands, Poland, Portugal, Spain, Sweden, Switzerland, UK	12	Q423
6	edotco[2]	Operator owned	57983	Bangladesh, Cambodia, Indonesia, Laos, Malaysia, Myanmar, Pakistan, Philippines, Sri Lanka	9	Q423
7	Vantage Towers [3]	Operator owned	46600	Czech Republic, Germany, Greece, Hungary, Ireland, (Italy), Portugal, Romania, Spain, UK	10	Q423
8	GD Towers	Pureplay independent	41760	Austria, Germany	2	Q423
9	Crown Castle	Pureplay independent	40000	USA	1	Q423
10	IHS Towers	Pureplay independent	39739	Brazil, Cameroon, Colombia, Ivory Coast, Kuwait, Nigeria, Peru, Rwanda, South Africa, Zambia,	11	Q423
11	SBA Communications [4]	Pureplay independent	38035	Argentina, Brazil, Canada, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Guatemala, Nicaragua, Panama, Peru, Philippines, South Africa, USA	15	Q423
12	Mitratel	Operator owned	37522	Indonesia	1	Q423
13	Sites	Operator owned	34984	Argentina, Brazil, Chile, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Paraguay, Peru, Puerto Rico, Uruguay	15	Q423
14	New Towers	Pureplay independent	30200	Russia	1	Q122
15	Protelindo	Pureplay independent	29792	Indonesia	1	Q423

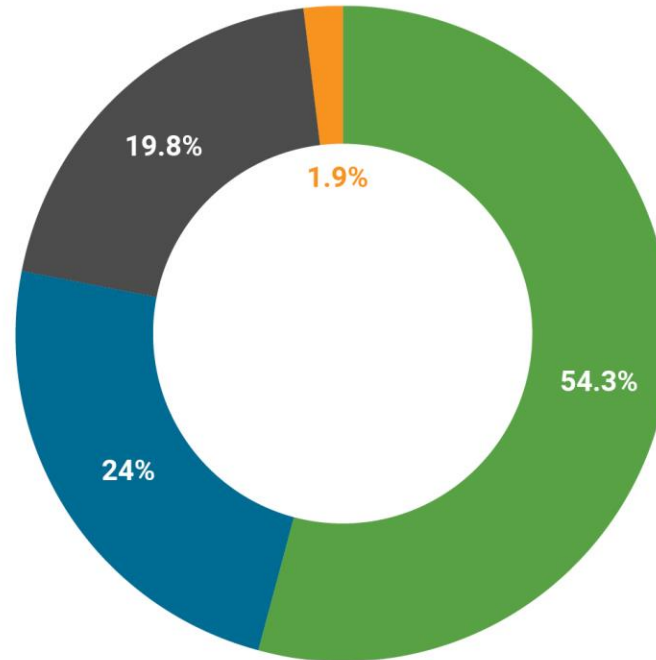
Ownership of the world's 4.96mn towers on the eve of 2022



■ Operator-owned towercos
 ■ Pureplay independent
■ MNO-captive towers
 ■ JV Infracos

Source: TowerXchange

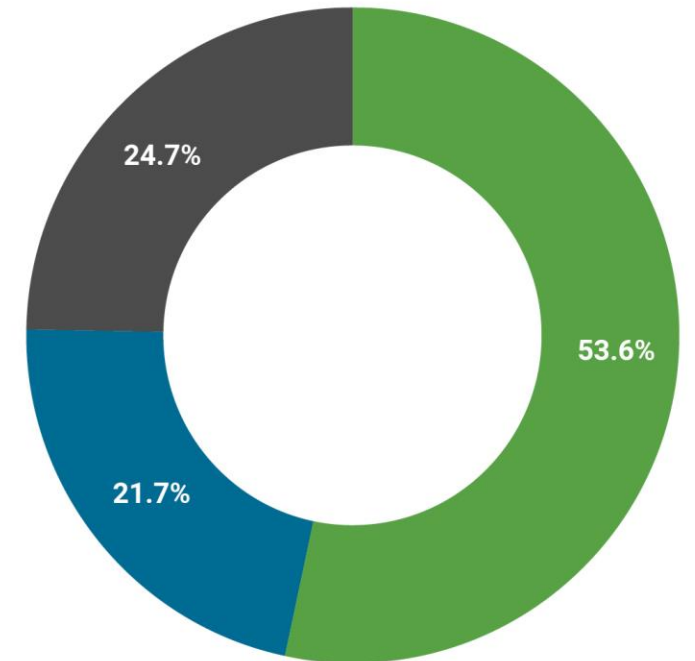
Ownership of the world's 5.06mn towers on the eve of 2023



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Ownership of the world's 5.33mn towers on the eve of 2024



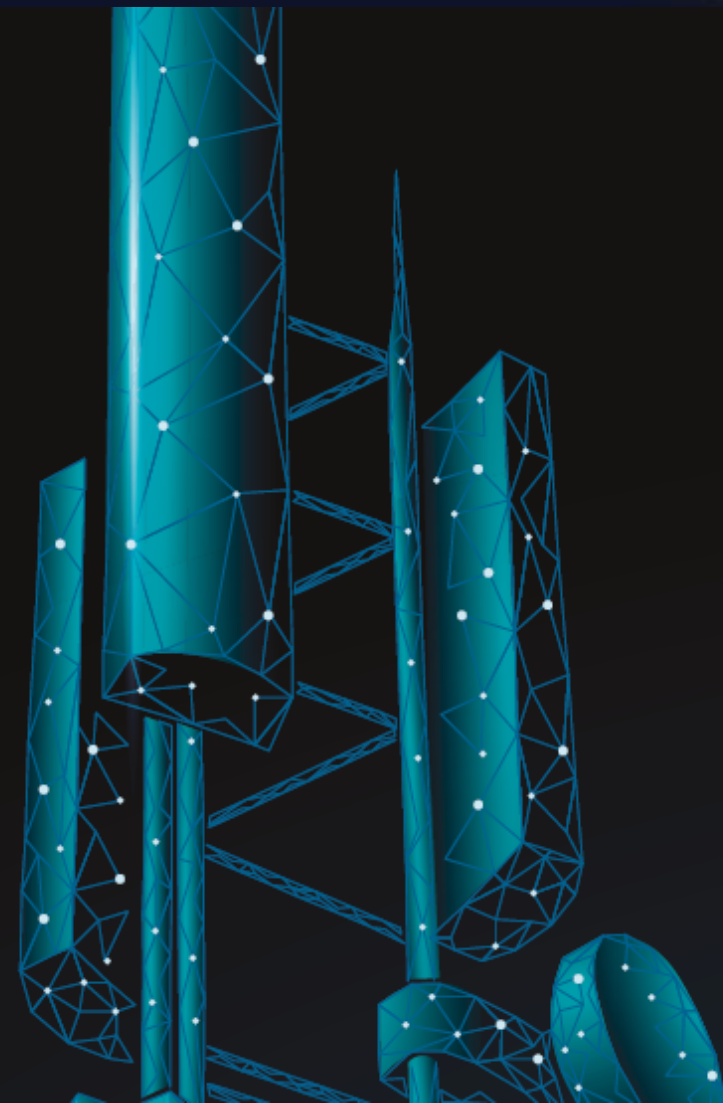
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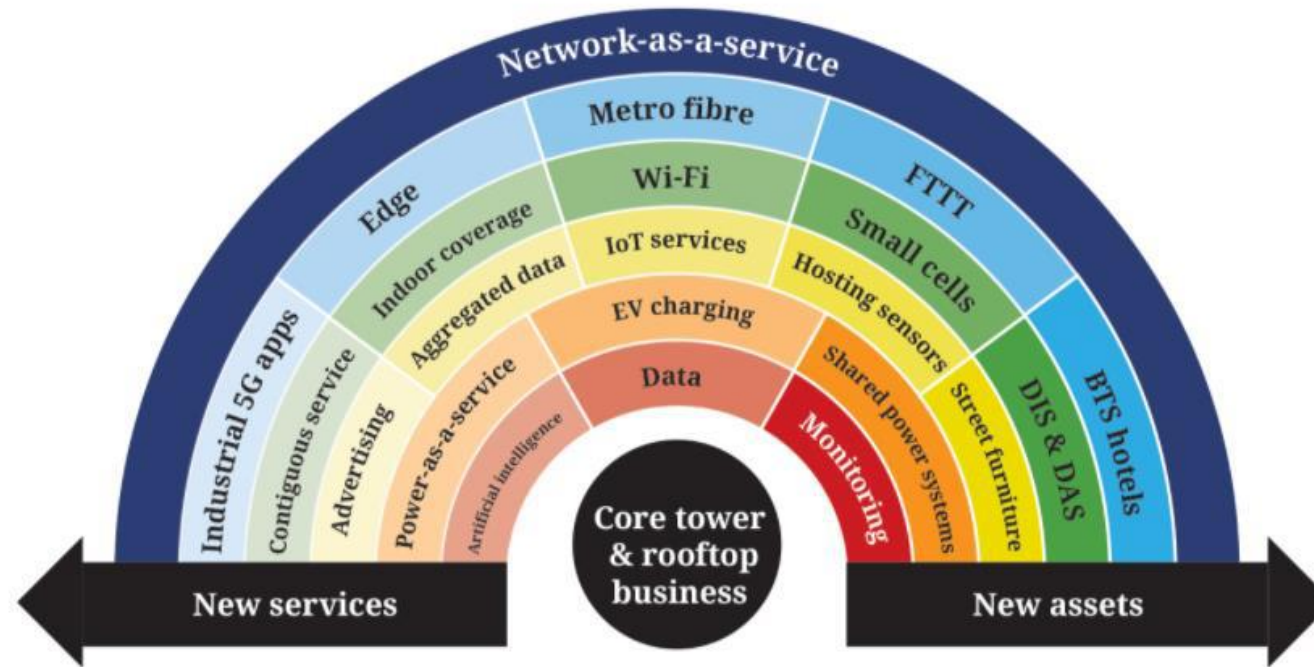
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What are the options?



Source: TowerXchange



Energy related services and revenue streams





Smart towers, smart cities and data-as-a-service





In-building solutions



JTOWER



Satellite backhaul and other non-terrestrial network (NTN) connectivity

cellnex 

AST
SpaceMobile



PROTELINDO
A Subsidiary of PT Sarana Menara Nusantara Tbk



Network-as-a-service





Mobile private networks

boldyn
NETWORKS

 **FreshWave**
You're on



Edge data centres



SBAEDGE



CORESIT

An American Tower Company



Fibre



PROTELINDO

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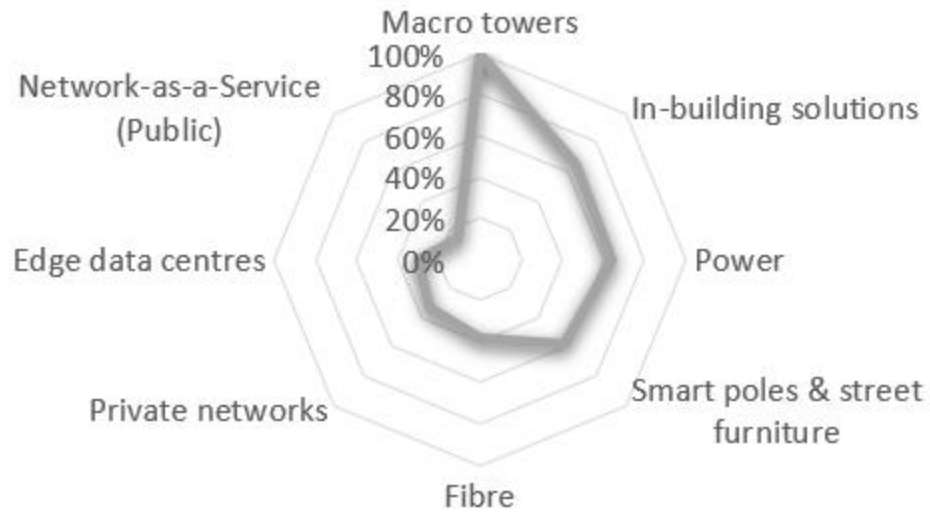
IHS

Towers of strength

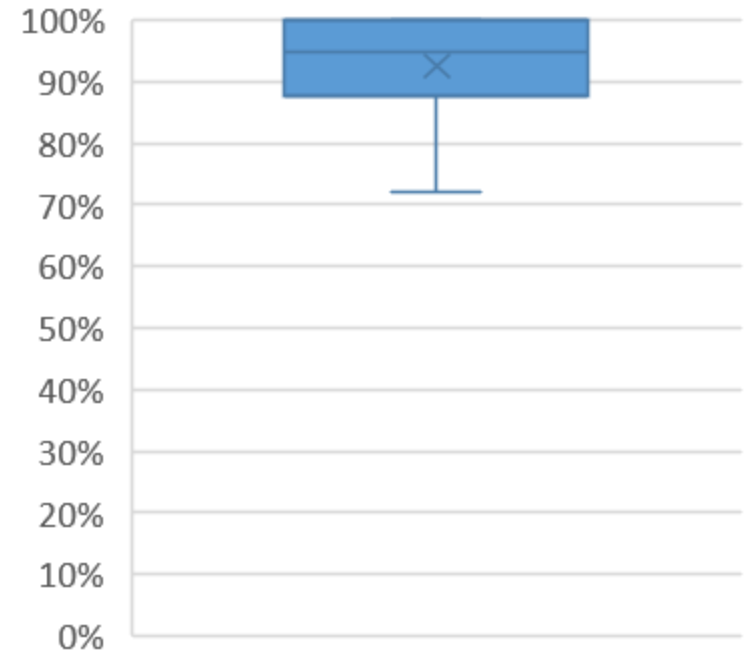
 **CROWN
CASTLE**

What's really happening?

Which services are offered by towercos today?



Share of towerco revenues from traditional business



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4. France	\$1,000,000	5,000	10/2022	5
5. Germany	\$800,000	4,000	10/2022	4
6. Italy	\$700,000	3,500	10/2022	3
7. Spain	\$600,000	3,000	10/2022	3
8. India	\$500,000	2,500	10/2022	2
9. Japan	\$400,000	2,000	10/2022	2
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