

## **Global Telecom Towers Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

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### **Report description:**

The global telecom towers market is expected to register a CAGR of 3.34 % over the forecast period. Tower-sharing is one of the significant growth drivers for the telecom industry, as it presents benefits, such as cost reduction and faster data rollout. The telecom tower industry has obtained high prominence as an independent industry, mainly in India and the United States.

#### Key Highlights

As the geographical opportunities decline, diversification opportunities broaden, driven largely by the new communications infrastructure topographies required by 5G. Many towercos are anticipated to hunker down in their core building business over the forecast period, buying and leasing vertical real estate, and such towercos may still see plenty of 5G antenna overlaid onto their towers.

In February 2021, Bharti Airtel, one of India's three major telecom operators, planned to develop its own 5G network technology stack in partnership with Qualcomm. The telco is expected to use the Qualcomm 5G Radio Access Network Technology stack to deploy its commercial 5G network, which can help set up virtual and open 5G networks throughout India.

The increasing emphasis on improving internet connectivity in rural areas is one of the major factors stimulating the deployment and improvisation of the telecom infrastructure in these areas, thereby aiding the market's growth. Smartphone penetration, rising awareness, increasing penetration of digital technologies, and investments from several organizations and governments are increasing the adoption of internet connection in these regions.

There has been a significant rise in the demand for connected and mobile devices globally. According to Cisco, the number of devices connected to the IP network by 2023 is expected to be 29.3 billion networked devices. The share of Machine-To-Machine (M2M) connections may grow from 33% in 2018 to 50% by 2023, with 14.7 billion M2M connections by 2023.

The environmental impacts of telecom towers have always been a significant concern. Radiation from mobile towers has been a significant issue, which is recognized as an unseen and subtle pollutant affecting life forms in multiple ways.

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With the outbreak of COVID-19, the telecom industry witnessed a significant increase in demand for internet services due to a major chunk of the population staying at home and in remote working conditions. The increase in people working from home has led to increased demand for downloading, online video viewing, and communication through video conferencing, all leading to increased network traffic and data usage.

## Telecom Towers Market Trends

### Operator-owned Tower is Expected to Register a Significant Growth

In the operator-owned telecom tower segment of the market studied, multiple mobile network operators (MNOs) are responsible for towers' construction, functioning, and maintenance. These services are being increasingly outsourced to third-party companies in emerging economies.

Between towercos nearing saturation of addressable markets and investible portfolios globally, combined with the growing tendency of MNOs to carve out and keep operator-led towercos, towercos are compelled to look beyond their core business of building, purchasing, and leasing vertical real estate to consider new assets and new services. Indeed, according to many towerco leaders, upwards of 50% of organic growth is now found not in macro towers and rooftops but in lamp posts and in-building solutions.

Operators own more than two million telecom towers, while third parties have constructed the rest. Moreover, the advent of operator-owned companies that provide telecom towers, such as Bharti Infratel (India), with other MNOs as their clients, has provided further growth to the operator-owned telecom tower segment.

The trend of ownership of towers varies from region to region. In Asia-Pacific, operators cling to their towers as a primary source of differentiation. In contrast, most of the towers in the US tower market have long since been transferred from MNOs to independent companies.

Mobile operators in countries such as India tend to own their towers through their captive tower subsidiaries or through joint ventures where they share ownership with other operators. The independent tower company model is more effective when compared with mobile operators owning their tower subsidiaries because such a model facilitates growth through arms-length contracts and removes the mobile operators' concerns over leasing space on their competitors' towers.

### North America is Expected to Hold Major Share

The US landscape is one of the most competitive landscapes for major vendors. Many companies are operating for growth due to the country's excessive demands for 5G telecom. The US government has many key vendors engaging in mergers, acquisitions, partnerships, rollouts, and coalitions.

SBA Communications is a major tower provider in the United States, with around 10,000 towers in the country, and is known for its focus on wireless communications. Additionally, the company announced a long-term master lease agreement with DISH that would provide DISH with access to SBA's nationwide portfolio of wireless communications sites.

Moreover, in February 2021, PG&E announced that it had agreed with SBA Communications Corporation to sell its license agreements with wireless providers. This agreement could also enable SBA to continue market and sublicense access to the towers and structures to additional wireless providers.

In Canada, mobile wireless services have been the largest and fastest-growing telecommunications industry in recent years. That trend is expected to continue with the deployment of new technologies, such as fifth-generation (5G) networks and new applications, including the Internet of Things (IoT).

Bell Mobility, RCCI, and TCI (collectively, the national wireless carriers) together exercise market power in the provision of retail

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mobile wireless services in all provinces except Saskatchewan, where SaskTel exercises sole market power. Bell Mobility exercises market power to provide retail mobile wireless services in the Northwest Territories, Nunavut, and Yukon.

Furthermore, in March 2021, a partnership was also announced between the Government of Canada, the Province of Ontario, and the Eastern Ontario Regional Network, which is expected to bring reliable wireless connectivity to 99% of Eastern Ontario's residents and businesses, bridging the cellular gap to enhance work, safety, and quality of life in the region. The initiative is part of Rogers' ongoing commitment to expand service and improve connectivity for underserved communities, including rural and remote regions.

## Telecom Towers Market Competitor Analysis

The telecom tower market's intensity of competition is moderately high, and it consists of several major players. In terms of market share, few major players currently dominate the market. These major players with star shares in the market are expanding their customer base across foreign countries. These companies leverage strategic collaborative initiatives to increase their market share and profitability. The companies operating in the market are also acquiring start-ups working on telecom towers to strengthen their product capabilities and make strategic partnerships. Hence the market concentration is moderately high.

In October 2022, the American Tower Corporation's (American Tower) African operations (ATC Africa) and Airtel Africa PLC (Airtel Africa) together announced a multi-year, multi-product agreement in support of Airtel Africa's network rollout for leveraging ATC Africa's vast portfolio of communication sites across its footprint in Kenya, Niger, Nigeria, and Uganda for product development capabilities. The companies plan to significantly increase connectivity on the continent, provide digital inclusion to marginalized populations, and achieve their shared greenhouse gas (GHG) emission reduction goals through collaborative efforts.

### Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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