

# Small Cells as a Service – Neutral Host Regulation in Europe



## FIVE PRIORITIES

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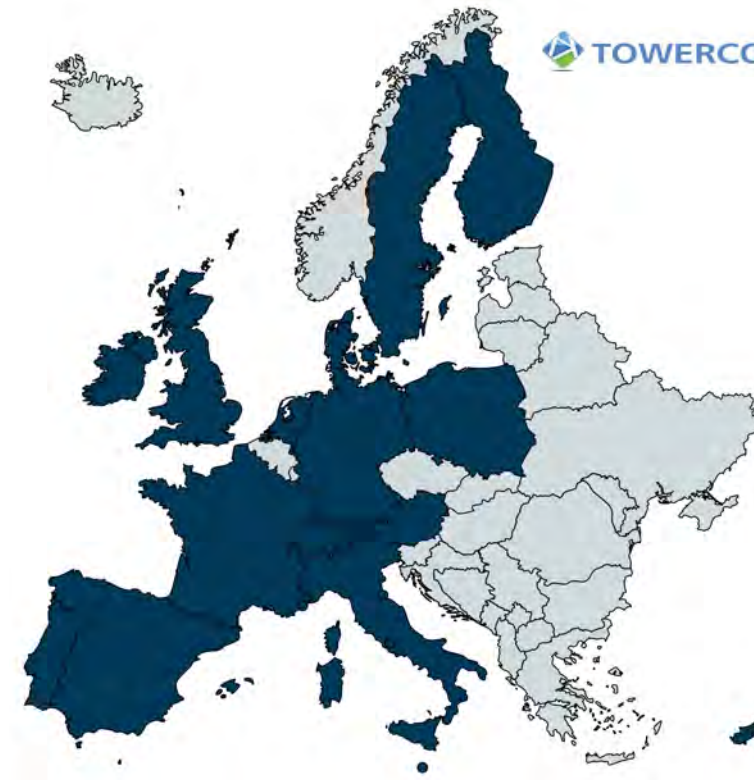
Wireless Infrastructure Group



# European Wireless Infrastructure Association

10 independent TowerCo members  
operating more than 150,000 sites  
across 16 countries:

- Austria
- Cyprus
- Denmark
- Finland
- France
- Germany
- Ireland
- Italy
- Malta
- The Netherlands
- Poland
- Portugal
- Spain
- United Kingdom
- Switzerland
- Sweden







## New model, new requirements

### EUROPEAN WIRELESS INFRASTRUCTURE ASSOCIATION

- Independent infrastructure operators with a wholesale-only 'neutral host' business model, EWIA members can play a vital role in unlocking the investment needed in 5G network infrastructure to solve Europe's mobile connectivity challenge
- Attracting long-term low-cost capital into high-quality shared telecom infrastructure, EWIA's ten members operate over €100bn of wireless infrastructure assets globally
- A combined portfolio of over 150,000 assets in Europe, raises the share of independent infrastructure to approximately 35% of the wireless infrastructure in Europe
- Developing, acquiring and operating communication towers together with investment in the fibre-connected small cell networks in buildings and on city streets needed for 5G
- Our business model has partnerships with MNOs at its heart, each with its own unique requirements

Leadenhall Building, London  
In partnership with British Land

# What needed to change?

## REGULATORY LANDSCAPE IN 2014

- European Union, national and local policy entirely based on retail MNO model, with no recognition of the growing importance of independent or neutral infrastructure models.
- National and local deployment policy inconsistent, fragmented and unfit to deliver EC's digital transformation ambitions.
- Policy development taking little account of the implications of technology development (e.g., small cell network densification required for 5G) and evolving business and service models.
- Spectrum policy focused on retail markets, not recognising socio-economic benefits from other business models.

Canary Wharf, London  
Deployed across 97 acres of  
mixed-use real estate



# What has improved?

## REGULATORY LANDSCAPE IN 2021 - EUROPE

- Improved but by no means precise alignment of socio-economic policy ambitions and regulatory roadmap.
- European Electronic Communications Code - Article 80 recognises the benefits of independent 'infrastructure-as-a-service' and provides for a lighter touch regulatory model for 'wholesale-only networks'.
- European Commission Implementing Regulations - EC has adopted new regulations on small cell antennas to help advance the deployment of 5G networks across the European Union.
- Greater recognition of the need for spectrum access for other business models to achieve more efficient use of radio spectrum, and to give incentives for innovation.



MediaCityUK, Salford  
High-capacity 4G services through to  
5G enablement

# What has improved?

## REGULATORY LANDSCAPE IN 2022 - UK

- Infrastructure-as-a-service identified in the UK Government's Future Telecoms Infrastructure Review as a model that can encourage investment and competition in the deployment of wireless infrastructure.
- The new Electronic Communications Code which facilitates access to land and street furniture and at lower cost.
- Increased permitted development rights to lower the threshold for planning consent to deploy small cells and other wireless infrastructure.
- Better understanding from progressive local authorities of the value of high-quality communications infrastructure.

Aberdeen

WIG deployed Europe's first C-RAN deployment in partnership with O2





## What still needs to be done?

### FIVE REGULATORY PRIORITIES FOR EUROPE AND THE UK

- Better understanding amongst all policymakers of the value of the independent or neutral operators in delivering infrastructure-as-a-service model.
- Policy interventions designed to embrace independent operators alongside MNOs to achieve greater levels of infrastructure sharing, more connectivity and at lower cost.
- Transitioning progressive regulation from statute to front line, especially at a local authority level.
- Regulation that is agile and responsive to the digital transformation of businesses, property owners, industry and key sectors like transport and utilities.
- Spectrum policy that supports private networks – a shift from ‘innovation sandpit’ to ‘industrialised’ robust and resilient networks

Savoy Hotel, London  
Bespoke infrastructure-as-a-service  
for an iconic destination

