

Tower  Xchange

Meetup Africa 2022

11 - 12 October 2022

Sandton Convention Centre, Johannesburg, South Africa



The meeting place for the African tower industry

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TowerXchange Meetup Africa 2022 at a glance



A complete VIP representation of the African telecom tower industry



300+

attendees



30%

towercos and MNOs



45

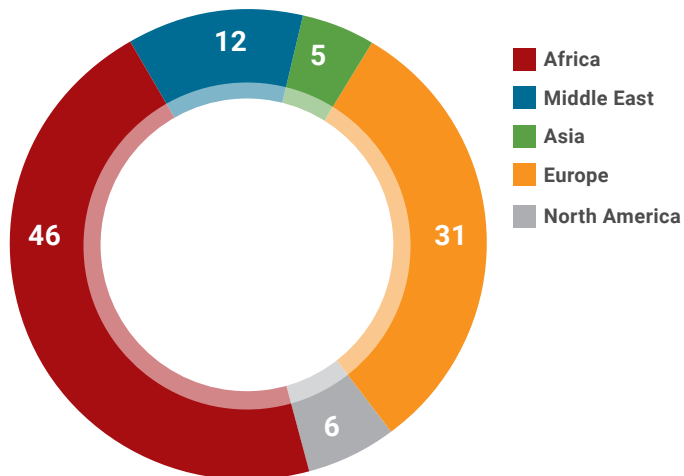
different tower and MNO
companies represented



41%

of towerco attendees at
CXO level

Where our audience came from:



A packed conference programme and exhibition



70+
Speakers



16
Innovation
Stage
Pitches



5
Working
Groups



32
Exhibitors
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30
Interactive
Sessions

"TowerXchange Meetup Africa brings great value as a one-stop engagement with the relevant players and as an information portal to inform decisions on future strategic directions."

Timothy Waga, Subject Matter Expert - Structural Engineering, **Safaricom**

"TowerXchange Meetup Africa is on my annual 'not to be missed' list."

Juanita Clark, Chief Executive, **Digital Council Africa**



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The top take homes from the 2022 TowerXchange Meetup Africa



The annual meeting of Africa's towerco executives and the broader telecom tower ecosystem took place in October 2022 in Johannesburg, South Africa. The industry came together for the first time for a full face-to-face meeting in three years, to discuss how the industry is evolving, confronting new challenges and reflecting on the current and future business opportunities in the region.

Discussion areas:

1. A new industry structure is taking shape
2. Africa has surprising plans for 5G
3. The rural revolution has become mainstream
4. ESCOs continue to grow steadily
5. Towercos are exploring minigrids
6. Investment in green energy is increasing
7. The industry is collaborating towards ESG goals
8. Diversity and talent are being prioritised
9. Safety is getting more attention than before
10. Innovation remains a key focus





Take home 1: A new industry structure is taking shape

Future growth opportunities lie in rural and build-to-suit

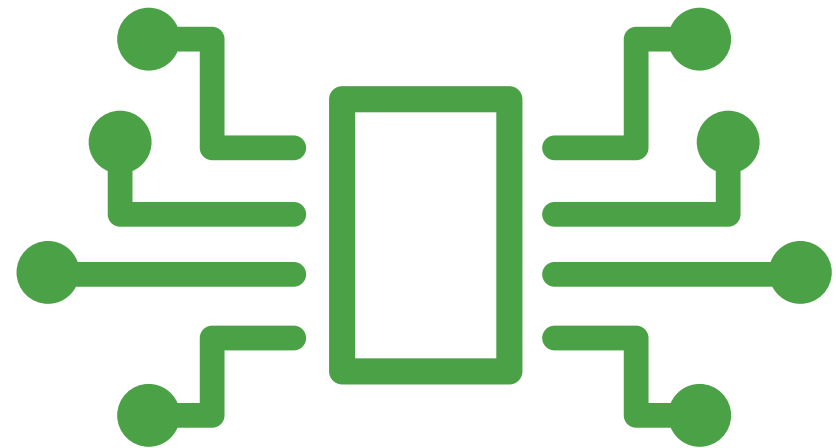
Most major MNOs have now divested their towers to towercos and few markets are left with opportunities to acquire new portfolios. This has led to the rise of large African towercos with strong economies of scale and it is likely we will see future M&A allocated to consolidating the African tower sector. This is also moving tower portfolio growth away from acquisitions and towards new builds. Infrastructure demand is concentrated in rural areas as MNOs and governments attempt to connect the unconnected. Towercos need to find a low-cost rural solution to make connectivity in rural areas more affordable for MNOs and end-users.

New towercos launch and old firms face new competition

Some MNOs are looking to capitalise on the success of towercos with Axian Telecom's TowerCo of Africa set to launch in Uganda and Vodafone follows Vantage Towers' strategy carving out their South African portfolio. New rural specialist towercos such as AMN (Africa Mobile Networks), NuRAN and Vanu are filling the gap in rural coverage. Challenger towercos are also on the rise with Eastcastle and Paradigm building portfolios in new markets and Atlas Towers returning to South Africa. Digital Bridge sees synergies between towers and their US\$1bn investment in digital infrastructure across Africa.

Supporting Africa's digital future

While new service verticals were on the mind of all major towercos, emphasis was placed on the need to look at what works from a synergy, operational and financial point of view. Of particular interest was fibre provision, which is a good extension of towerco services as it makes towers more attractive and has a shared business model. However, MNOs already provide and have experience with laying fibre and Airtel was quick to point out that towercos may not be best placed to leverage this. Edge data centres are a likely new service for towercos, especially African towercos who have become experts in managing energy and security, with potential to leverage their skill-set and asset class. But dispersion in regulation between markets make new services hard to harmonise. Helios Towers discussed the restrictive regulatory pressure from their new Network-as-a-service model, which is vital to providing rural connectivity.



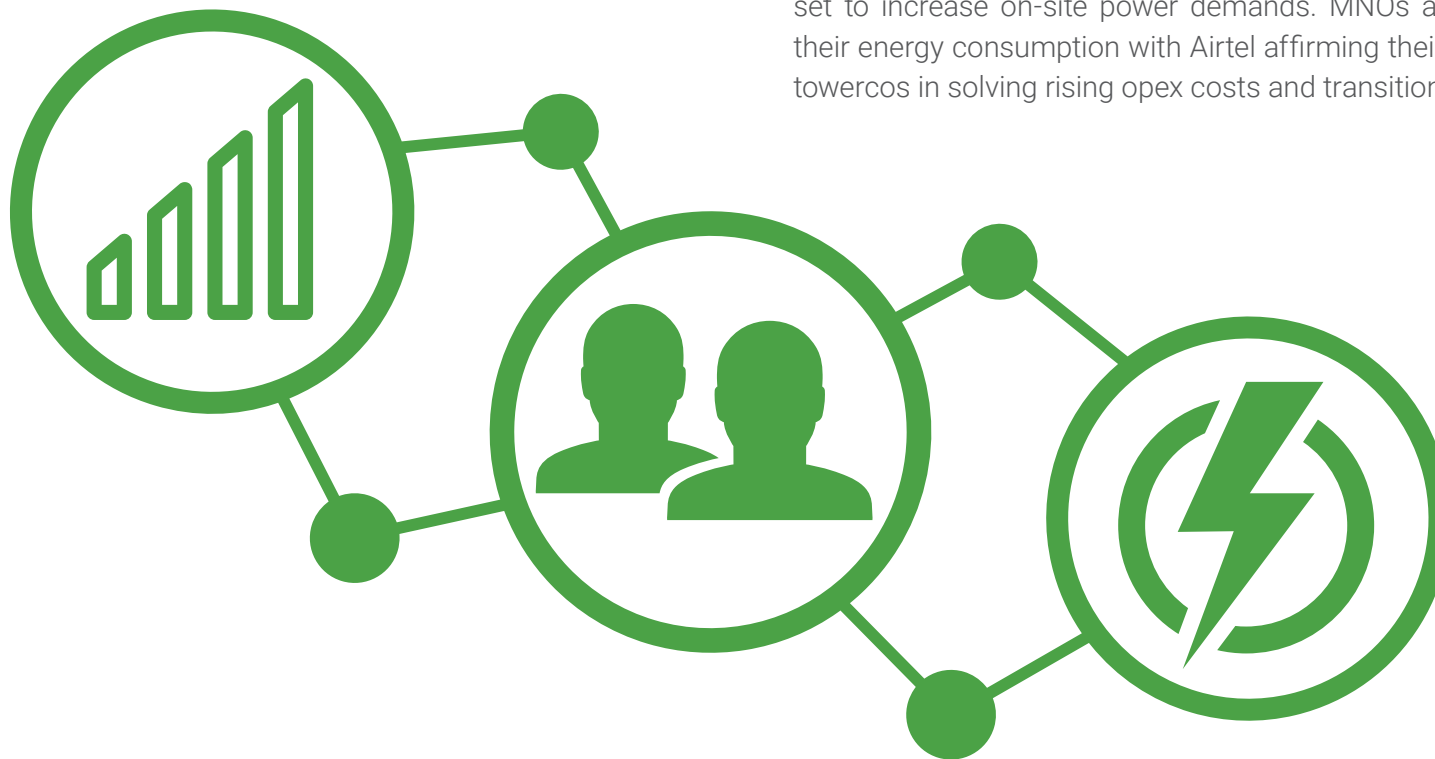


Rising capital costs affect plans

A tough macro-cycle is leading towercos to invest in a disciplined way, with investor's scrutinising emerging market investments all the more thoroughly, and putting capital allocation to African markets under pressure. In a move to become more Africa-centred, towercos need to localise their supply chains to reduce reliance on access to dollars and improve time-to-market. American Tower is attempting to insource their supply chain on the continent, having successfully brought Polarium's lithium-ion battery production facility to Cape Town.

Energy management tops the priority list for MNOs and towercos

High oil prices and a nightmarish diesel supply chain have ramped up the sustainability agenda. Towercos are now exploring battery, solar and electrification options to reduce energy consumption and have made commitments to allocate more capital in 2023 towards reengineering the energy business. American Tower reported that on some sites energy costs are higher than non-energy costs, and have committed to reduce emissions by 40%, which is challenging when portfolios are constantly growing and 5G set to increase on-site power demands. MNOs are also looking to improve their energy consumption with Airtel affirming their commitment to work with towercos in solving rising opex costs and transitioning to sustainable energy.





Take home 2: Africa has surprising plans for 5G

220,000 new points-of-service will be required for 5G over the next decade as Africa moves to adopt the new technology. The past year has seen a series of 5G spectrum auctions, pilots and roll out across multiple African markets, and those investments aren't made for PR. MNOs are investing in 5G because it will be adopted, slowly but gradually, in key parts of Africa. Towercos are already getting the network ready for 5G deployments in key cities.

MNOs will need to justify their spectrum investments and the result will be a rapid increase in colocations as operators densify their network coverage and invest in fibre backhaul. Sandile Msimango, Vice President & CEO of IHS Towers South Africa, stated that they are already considering the fibre and power demands of 5G on new sites, and are now starting to include space for edge data centres. Taona Jakachira, Head of Department at Econet Wireless Zimbabwe, highlighted that 5G will be shaped by the needs of their customers. Econet is rolling out deployment of 200 5G base stations and improved backhaul across Zimbabwe.

5G opens the door for edge data centres

While MNOs haven't made explicit plans yet, it was highlighted that operators will continue to be unlikely own digital infrastructure. New edge location systems are being deployed across Europe by hyperscalers such as Amazon for MNOs. Many of these are rooftop sites and have strong synergy with towers which provide the wireless networks for edge computing. Early use-cases, particularly around private networks for heavy industry and enterprise centres, is fuelling demand for edge computing infrastructure. For example, DigitalBridge has already invested US\$1bn in data centres across Africa including edge data centres. If towercos want to offer more than macros to their customers, they will need to start deploying edge data centres soon or risk having other infrastructure providers become leaders in this space.

New small cell networks will be required to deliver high capacity 5G

Macro towers continue to dominate in the African industry but the densification demands for urban 5G networks become unachievable without micro site deployment. Andreas Grewing, Senior Director at Delta Electronics, described the future 5G architecture as a series of small cell networks every 50 meters with 10-hour back-up to provide the high-band 5G needed for next-generation technology. This poses a significant challenge for the tower industry, who will need to rethink how networks are designed in urban spaces.

With great connectivity comes great power consumption

Towercos are already seeing an explosion of single site 5G deployments and while this hasn't had an impact on tower designs, energy consumption is expected to rapidly increase with reliable back-up. While macro-towers have the spatial configurations to accommodate further energy equipment, batteries and solar are too large and expensive to deploy on urban rooftop sites and small cells. Polar Power suggests that small, reliable generators will be required to power urban 5G networks as new industries such as electric cars will compete for grid power.



Take home 3: The rural revolution has become mainstream



In the rural space things are heating up

There are now 4,000 lightweight revenue sharing sites active in Africa. Around 1,000 of these sites are already being added every year and the pace is accelerating with more contracts being let by MNOs and more towercos entering the space.

TowerXchange is aware of a number of firms offering rural solutions in Africa's largest market Nigeria: AMN, Raeanna, i-engineering, Hotspot Network as well as IHS Towers and American Tower. But the development of the technology is continent-wide with AMN, Vanu and NuRAN all now active continent wide. In November Vanu added to it 400 sites in Rwanda with a deal with Orange to build 700 sites in Cote d'Ivoire, 170 in Burkina Faso, and 200 in Liberia. This follows NuRAN announcing deals in the DRC, Cameroon, Ghana, Cote d'Ivoire, Namibia, Sudan and South Sudan. The biggest player remain AMN with over 3,000 sites in Benin, Cameroon, Congo Brazzaville, Cote d'Ivoire, DRC, Ghana, Guinea, Guinea Bissau, Liberia, Nigeria, Sudan and Zambia. The breadth of countries covers shows the low capex required to get these sites up and running and relatively low critical mass required to run a viable opco.

What goes into a rural site?

Most rural sites of this model rely on a simple foundation, a prefabricated steel monopole combined with a low-cost open RAN base station, off-the-shelf antenna and VSAT, with an energy set-up involving solar panels, lithium-ion batteries (usually stored off ground to avoid tampering and flooding) and a smart controller. TowerXchange understands that some towercos have struggled with reducing capex, some have reported figures of US\$40k per site. At the Meetup Colby Synesael said IHS Towers had been able to reduce site capex to US\$25-50k (versus US\$75-US\$100 for a traditional macro), AMN's Mike Darcy touted a capex figure half that.

The cost structure of these sites is very different to business as usual, and their growth could provide a dampener on demand for some goods and services. For example, Morningstar supply energy equipment to AMN, but the towerco sources some network equipment internally, its steel direct from China and has its own in-country installers. The model largely sidesteps the existing telecom tower supply chain.

What happens next?

50% of Africa live in communities of 1,000 people or less which means that if you want to achieve good population coverage, you have to provide rural coverage. Fundamentally, rural connectivity is no longer a technological problem, it's an economic one, the challenge is building a tower a village, making money and sharing out the returns between consumers, mobile operator, towerco and investors.

250mn people live in areas without mobile coverage which makes it a huge opportunity for towercos and MNOs. As the technological problems are solved the focus of operators is switching to economics and we are seeing deals announced every month expanding the model. The ability to satisfy governments and regulators that population coverage is expanding while also making a slight profit changes the nature of rural investment. The fact that capex can be outsourced too acts as a further accelerant. This improvement in economics is waking up investors to the opportunity too.



Take home 4: ESCOs continue to grow steadily



The post-COVID surge in data demand combined with an ongoing energy crisis means power management is more challenging than ever. In some markets fuel prices have surged 140% which alone would have an enormous impact on opex, even if it weren't also accompanied by shortages. In response, the ESCO market has seen a surge in RFPs from MNOs after a quiet couple of years; Orange has launched three new RFPs in three new markets and IPT Powertech predicts a massive spike in ESCO site allocation in 2023.

Network expansion into rural and off-grid areas will be a major contributor to the growth of ESCOs. An IFC report forecasts that by 2030 another 134,000 bad-grid and off-grid sites will be added in the developing world. ESCOs could see a growth of 300% and are predicted to be managing power at up to 250,000 sites by 2030. That's a long way from the 62,000 currently under management. Orange saw huge reduction in diesel consumption by using ESCOs to invest in renewables and hybridisation. Jean-Michel Canto, Chief Climate Officer at Orange, encourages towercos to follow the move to reduce fuel consumption.

Investors are increasingly open to ESCO projects

Over the last two years the ESCO industry is becoming recognised by investors and improvements in risk sharing has seen lots more interest from funds. Gabriel Bou Gabrael, GM ESCO Division at IPT Powertech, explained that it is becoming simpler and quicker to meet investors financing demands over the 14-16 months process of securing funds.

ESCOs in Africa have also been supported by the increase in development finance, offering a cheap and more understanding source of capital, but as ESCOs gain traction worldwide private investors are recognising their value too. Marc Immerman, Managing Principle at Metier, discussed how investor environmental consciousness make ESCOs an attractive investment opportunity. Advances in solar and better scalability and diesel costs rises also mean that going green doesn't have to be done as a cost.

ESCOs can help towercos and MNOs meet ambitious sustainability goals

Over the last two years dozens of MNOs and increasing numbers of towercos are setting themselves sustainability roadmaps that include renewables targets and emissions reductions. Orange would be unable to meet its target to source 50% of its energy from renewables by 2025 without the investments made by ESCOs, and other MNOs will follow suit. Towercos are caught between their carbon reduction targets and their aggressive portfolio expansion. ESCOs bring investment in green solutions, with promises of 70-80% reduction in diesel consumption. Large towercos in Africa remain sceptical, having built up their own expertise, but the opportunity is being explored elsewhere.

Data management is key to driving ESCO growth

ESCOs face a monumental challenge: how to scale fast enough to keep pace with a growing tower sector hungry for power management. The key to this is data management and automation. Spencer Crawford-white, Technical Director at NETIS, pointed out that data management is poor in the industry and the deployment of AI and RMS will give greater visibility over power systems. As networks grow and pricing structures change ESCOs need to constantly adapt and scale. New sustainability targets mean carbon reporting is becoming a necessity; Orange needs to report their carbon footprint every 3 months and is looking to ESCOs to provide the data management to record this.





Take home 5: Towercos are exploring minigrids

Has the time come for minigrids?

Telecoms and mini-grids have so far seen limited integration but synergies between the two in providing rural connectivity could see towercos working with or owning minigrids across Africa. Public institutions in Africa have largely failed to satisfy energy needs and most investment in energy is grant capital. While Africa's population and data demands rise the power sector expands slowly and fails to deliver reliable growth of service. In comparison the telecom sector moves at a quicker pace with towers going up in weeks.

It's already happening: IHS Towers have looked into site clustering before, Helios Towers offer community charging in Tanzania, Crossboundary Energy are a minigrid developer as well as a telecom ESCO, and a surprising number of other towercos and MNOs at TowerXchange Meetup Africa were looking into the idea.

Synergies between towercos and minigrids

Minigrids and towercos both have the same agenda; bringing infrastructure to rural and underdeveloped communities to improve quality of life and connectivity. Idris Tayebi, Director at NEoT Offgrid Africa, sees the impact of having an anchor client decreasing the long-term costs of energy by 30-40%. By including the telecom tower into the mini-grid load, minigrid developers receive a stable source of income while rural sites are provided with sustainable energy.

Alternatively, AMN, a rural specialist towerco, is considering deploying their own minigrid solution alongside some of their 3,000 rural, solar-powered base stations. With their experience in power management and rural operations, and RMS tools already deployed on sites, AMN already have what they need to manage a network of minigrids. With the supply chain and local maintenance

teams already in place, having telecom and energy infrastructure in the same location is a logical next step according to AMN's CEO Mike Darcey.

Mini-grids are promising but issues persist

One major challenge to powering sites through a minigrid is guaranteed uptime. Uptime requirements are passed down to minigrids the same way they would be to an ESCOs which isn't feasible. Belgacem Chriti, CEO of Amane Towers, suggests that towercos and MNOs cannot expect a 99.9% uptime in an SLA with a minigrid, but the 20% opex saving on fuel for a rural site with a challenging revenue model makes this worthwhile. Instead minigrids should act as a grid connection, with back-up power remaining the responsibility of the towerco or ESCO; but with the bonus that the grid connection is actually reliable.

The business model for minigrid remains challenging. Currently, minigrids are reliant on subsidies and development finance as the business model can't stand on its own or attract private investment. Minigrids may have low opex but the capex is high; the batteries and solar equipment is expensive and returns from rural communities are low as billing, collection and management are difficult. Not every village is suitable for a minigrid either with AMN identifying that only 10% of their locations are suitable for a minigrid. Deployments will need to be on a case-by-case basis and don't offer an energy solution to every rural site.





Take home 6: Investment in green energy is increasing

Head and heart, hand in hand

There are two big drivers for continued investment in greening the network: sustainability and operations. Chris Jonck of American Tower has been running their power strategy on the continent for years and has combined reductions in diesel dependency and operational costs without reducing SLAs. That's exactly what you need if sustainability is to guide strategy. On the cost side, Helmundt Strumper of Atlas Tower pointed to their experience in Kenya, fuel subsidies have been reduced and grid power costs hiked 15.7%.

Technology change

Solar, battery, wind you name it: costs are coming down and that technology change is not decelerating. Directly reducing fuel use is important, but new technology continues to reduce site visits, though hybridisation with new solar/battery combinations. Atlas Tower now uses hybrid solution has standard thanks to their high autonomy. In Nigeria (and their other smaller markets), Gabriel Bou Gabrael of IPT PowerTech revealed that they have been able to reduce monthly diesel consumption from 1.4mn litres to 300k by installing solar and batteries. This doesn't just save on fuel cost, it reduces on generator runtime, maintenance, refuelling, site visits and vandalism. In fact, new technologies are becoming economic which had previously been little used in telecoms.

Alternative fuels and new generators

There were a plethora of alternative and lower carbon generator technologies on show at Meetup Africa. Aquarius Engines, CHEM Energy, NETIS, Polar Power, i-engineering and Bladon all offered generating technologies that offer

dispatchable power but without the emissions of a diesel generator (and almost certainly more besides, we apologise if we missed you). Internal combustion engines or microturbines can use synthetic fuels or alternatives to diesel that radically reduce pollution. More than ever before these alternatives were given a real airing.

Telecoms can't build the supply chains for these new technologies alone, but alongside other industries alternative energy supply chains can be created. Natural gas and LPG engines have been around for a long time, hydrogen fuel cells are old technology.

Policy

Of course, towercos cannot do it alone, and supporting regulations or inward investment can help move telecoms in a green direction. American Tower has helped to on shore lithium ion battery production in South Africa and attendees from across the industry said they would be supportive of suppliers who brought more production to Africa. If governments can reduce import duties on renewable technology or tax rebates on renewable investment it can further help the business case for investment.



Take home 7: It's all about ESG



ESG touches everything

Towercos are not resting on their laurels. The towerco model is inherently sustainable thanks to the magic of sharing heavy, dirty, difficult passive infrastructure between multiple mobile operators, but towercos are going much further for the environment. In Africa, connecting the unconnected is again inherently supportive of development goals, but towercos have projects across their supply chain to maintain their social licence to operate. And when it comes to governance towercos are employing local teams and rolling out best-in-class governance rules.

Reporting standardisation

There are not GAAP practices for ESG measures in the same way there are for a company's balance sheet and cashflow, and that can lead to some apples to oranges comparisons between towercos. GRI standards are being adopted but there is still a tendency to create unique reporting standards to communicate what a towerco is doing. For example IHS Towers is reducing the kilowatt-hour emissions intensity of its tower portfolio by 50% by 2030; Helios Towers will reduce the carbon intensity per tenant by 46% by 2030; whereas American tower has committed to reduce direct scope 1 and indirect scope 2 GHG emissions by at least 40% by 2035. All similar, but all different.

This can lead to towercos talking in a similar language but not understanding one another. Towercos can have dozens of environmental KPIs (over 60 in IHS Towers latest sustainability report) but not know which overlap with the targets of another towerco in the region which will hamper collaboration. TowerXchange was pleased to be a place to reignite collaboration between towercos on these important topics. American Tower have started building sites with "green site specifications" for Airtel, is this something which could be rolled out more widely?

How accurate is the reporting of Scope 1, 2, 3?

Even at DigitalBridge, with limited direct generation of power and largely in developed markets, while portfolio companies feel very comfortable reporting with Scope 1 and 2 emissions, but even they struggle with Scope 3. Scope 3 are emissions from the supply chain and rely on accurate reporting from partners or some very confident (overconfident?) estimations. As MNOs push harder to reduce emissions that will feed down the chain to towercos and all their myriad suppliers.

Social impact

Each towerco in the region is doing extra for its social impact and to maintain its social licence to operate. IHS Towers is reserving millions for community investment, Helios Towers recently built a ITT hub in rural Ghana alongside its sites there and American Tower has long had a "Digital Community" initiative to raise digital literacy and improve access to education and support women. Beyond that local recruitment and improving the talent pool at towercos can draw on was seen as essential.





Take home 8: Diversity and talent are being prioritised

Empowering people locally

TowerXchange has hosted the African telecom tower industry for many years. Initially born by the sale of Cell C's towers to American Tower over a decade ago the industry has been shaped by international investors closing deals with multi-country MNOs extending their networks. In the intervening years major progress has been made in hiring local, with towerco building teams locally to run opcos; for example, 98% of Helios Towers local teams are Africa, with a similarly significant proportion from within country. Senior management, often African, may help with country set ups (for example the Tanzanian former head of Tanzania is now establishing operations in Oman), but long-term plans revolve around bringing in local talent. Similar processes are evident at other towercos.

Progress at Ex-Co level has been slower but a number of board members are now from the continent. When it comes to female employment (and participation in TowerXchange Meetup Africa) progress has been slower, even if representation at a senior level is comparable to other industries, there is still a gap.

Where are the women?

There are many senior women involved in the telecom tower sector; but a look to the stage at TowerXchange Meetup Africa would reveal a worrying lack of public-facing leaders. This is something the industry is committed to addressing and has already made moves. This is not being left to HR teams, or as an addendum to ESG strategies, but is being taken up by senior management who are bringing women into new leadership roles. Towercos were launched as small, entrepreneurial businesses which brought together investment bankers and engineers, so it is not surprising that there is a gender gap; but beyond that there is a skills gap too has opened up too. there is still a gap.

Addressing skills gaps

Towercos in Africa have never just dealt with grass and steel, they have had to build expertise and skilled teams to manage power. With the expanding portfolio of services demanded by MNOs today and in the near future there is a new need to hire differently and train new people. The development and deployment of tomorrow's networks cannot be done by the same people that helped deliver 3G if networks change as expected. Towercos will have to offer inbuilding solutions which require network expertise. If towercos build turnkey rural sites they need network expertise. If they move to offering edge compute then that supercharges power requirements; developing minigrids may draw on similar power expertise, but the billing and distribution is totally different. Towercos have to expand what it is they do and they have to find talent where they may not have looked for it hard enough before.



Take home 9: Safety is getting more attention than before



Pressure to delivery

Our discussion on safety at TowerXchange Meetup Africa is being reported anonymously, such is the sensitivity of the life and death decisions involved. The session was run by Gravity Training. Two things stood out in the discussion: skills and pressure. Once decisions about site location have been signed off MNOs want them live as quickly as possible, understandably. Pressure flows from MNOs down to towercos and is pushed onto contractors (and sometimes from them to other contractors down the chain). This pressure to deliver quickly can drive lots of negative behaviours and the industry is now adjusting to apply appropriate pressure, but that requires buy-in from everyone in the chain. The industry's This is a cyclical industry too which can flip between feast and famine which makes it hard to train and retain people.

Buy in at all levels

To address safety you need management buy-in, but you also need to train people to train and explain to their contractors and employees. The full length of organisation needs involvement, down to contractors with a change to mindsets. First of all, you have to appeal to the heart not the headfirst. You need to convince people that things are dangerous to them and then show them how to avoid it.

Ask yourself: what's the baseline knowledge of the contractors you work with? Now think about the local staff they have to hire to help with erection, and again maybe others that are employed by them. One example was given from Bangladesh, where lots of people habitually don't wear shoes. The movement from plain shoes to steel toecap boots can be hard to enforce but imagine the hurdle to convince people that don't like wearing shoes at all. In Africa, often contractors recruit poorly educated locals to help with erecting towers with no

experience using hoists or working with ropes under tension. There is a failure of communication and education down the chain that still needs addressing.

Standardisation

There are no universal safety standards for working on telecom towers. Different companies have different rules for the same supplier. Much of safe work at height or rigging isn't rocket science but confusing standards can make it difficult to enforce safe working. Dealing with two or three 3 tiers of contractors can also make it difficult to ensure standards are being enforced when multiple standards are floating around. Towercos are beginning to coordinate more on the safety standards pushed through to contractors and TowerXchange was pleased to see conversations progressing.

What are the blockers and enablers?

Why aren't towercos collaborating more? Why isn't the industry already one of the safest in Africa? Progress is being made but there remain some competition fears for towercos collaborating to tell their shared suppliers what to do, which is why organisation like Gravity Training and TowerXchange are creating safe spaces to discuss these topics. Mindsets are changing with towercos and contractors "competing for lives. not competing for business." The key is that speed to delivery isn't the deciding fact, towercos have to resolve client issues, not just make money in a short-sighted way. Work that kills people isn't good quality work. Incidents are nearly always avoidable. Africa doesn't have a culture of safety and that is not telecom's fault. but telecoms can do a lot to fix this.





Take home 10: Innovation remains a key focus

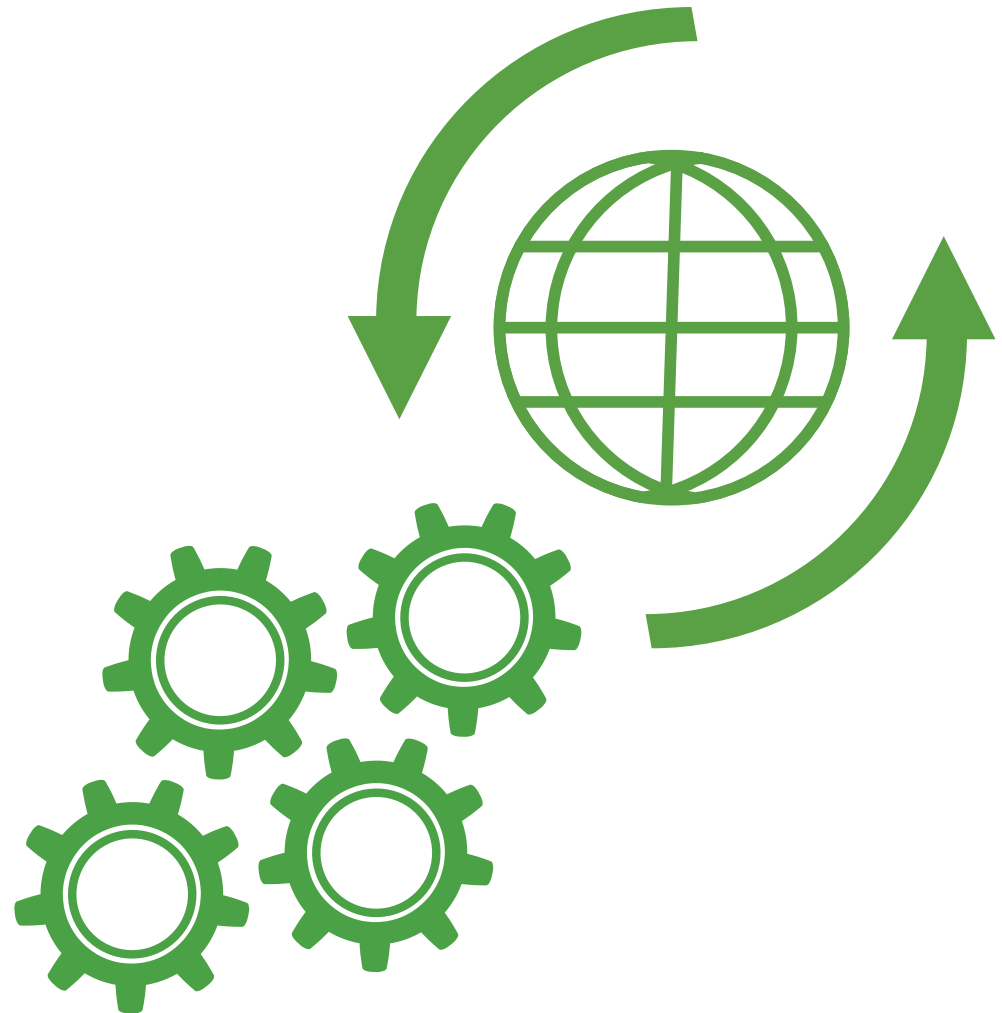
Doing something new ain't always easy

Towercos have conflicting incentives at time. Investors are happy to back what some call “the best business in the world” and expect a certain return on investment. At the same time, no industry stands still and investment in innovation is essential. This means that while towercos do little R&D in house compared to the big telecom operators, they support a rich supply chain of innovators developing new technologies.

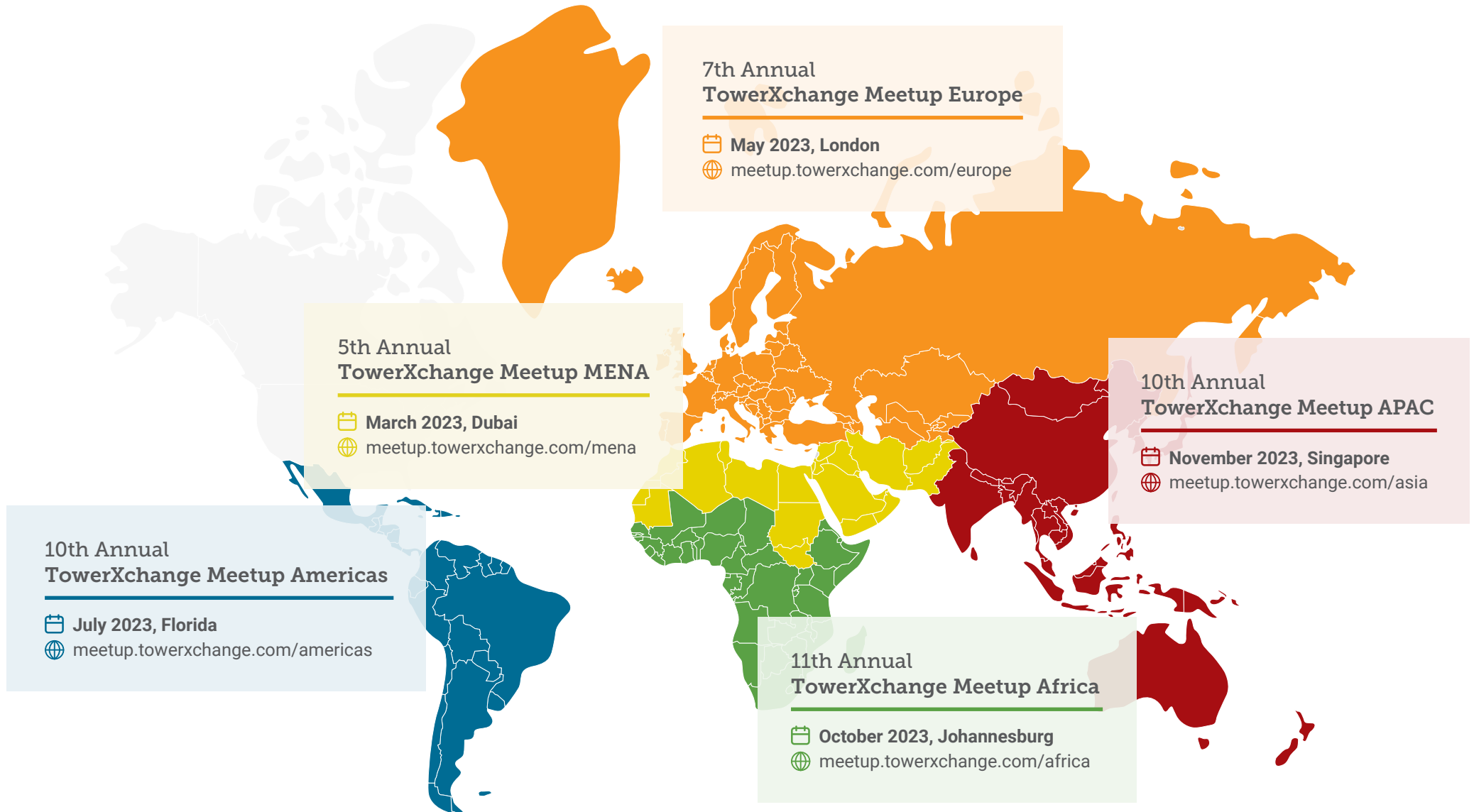
Innovation stage

The telecom tower world has blossomed over the last few years with new services and new technologies coming to market. At TowerXchange Meetup Africa innovators gave 5-minute pitches helping the audience understand what was the latest technologies that can help make operations smoother, energy greener, costs lower, or revenues higher.

Many thanks to PowerX, Energize the Chain, vHive, ISST, Aquarius Engines, Infozech, LOQ, NETIS, Asentria, Bladon, MRI Software, Cross-Flow Energy, eSite, Polarium, Pix4D and Polar Power for pitching on our Innovation Stage!



An overview of TowerXChanges 2023 Meetups



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A spotlight on key benefits available to event sponsors and exhibitors

Position your brand as a leader of the pack with one of our sponsorship packages designed to place your business front and centre of the world's most targeted audience of towerco CXOs and top executives. From providing brand exposure across multiple channels and supporting your networking needs to making business critical connections, to giving you access to premium thought leadership opportunities and membership discounts, these options will set your team up for success and make sure your business stands out from the crowd.

	DIAMOND 5 Positions Available	GOLD 10 Positions Available	SILVER 15 Positions Available	BRONZE 20 Positions Available	EXHIBITOR
BRANDING	Logo to appear on the event website home page	✓	✓	✓	✓
	Logo & profile to appear on the sponsors' & exhibitors page of the event website	✓	✓	✓	✓
	Logo to appear on the Networking app home page	✓	✓	✓	✓
	Verbal recognition at the start of keynote sessions	✓			
	Logo to appear on event marketing emails	All marketing emails	All marketing emails	Select marketing emails	Select marketing emails
	Announcement on TowerXchange social channels promoting your sponsorship	Individual post	Group Post	Group Post	Group Post
	Pre-event "Welcome to our Sponsors" email featuring company logo, virtual booth, relevant speaking engagements and on-site location	✓	✓		
	Option to provide a 30 second video to appear in the "Welcome to our Sponsors" email and a group social media post	✓	✓		
	Banner on virtual event platform home page	✓			
	Branding on-site at the event, including relevant sponsor signage	✓	✓	✓	✓
	Logo to be larger than other event sponsors on on-site signage	Larger than Gold, Silver & Bronze	Larger than Silver & Bronze	Larger than Bronze	
	Logo to appear on the post-event report	✓	✓	✓	✓
	Logo on holding slides of non-sponsored conference sessions	✓	✓	✓	✓
	Logo to be included on pre-event digital newsletters	✓	✓	✓	✓
Logo to appear at event registration	✓	✓			
THOUGHT LEADERSHIP	Option to provide a link to a blog entry to feature on the event Research Centre	2	1		
	TowerXchange roundtable interactions	✓	✓	✓	✓
	Standalone speaking position for a C-suite representative on the agenda (to be discussed with the event producer & subject to availability)	✓			
	Option to choose between an executive interview or contribution of a white paper	✓	✓		
Promotion of interviews & white papers	Permanent visibility on event home page; event research centre; featured section of TowerXchange website home page; LinkedIn promotion	Rotating visibility on event home page; event research centre; industry partner perspective section of TowerXchange website; LinkedIn promotion			



		DIAMOND 5 Positions Available	GOLD 10 Positions Available	SILVER 15 Positions Available	BRONZE 20 Positions Available	EXHIBITOR
NETWORKING	Attendee passes	5	4	3	2	1
	Discounted rate for additional attendee passes	10%	10%	10%		
	3m x 3m exhibition stand	✓	✓	✓	✓	✓
	Ability to receive messages and meeting requests from all attendees	✓	✓	✓	✓	✓
	Ability for team members to search the full attendee list on the networking app	✓	✓	✓	✓	✓
	Ability to scan attendee badges on-site in the networking app	✓	✓	✓	✓	✓
	Pre-Event list of companies interested in meeting with your company (information collected at registration check-out) shared once pre-event	✓	✓			
	Towerco meet & greet	✓	✓	✓	✓	
	Facilitated introductions for up to 5 key targets for your business	✓				
	Pre-event attendee breakdown and analysis	✓	✓	✓	✓	✓
DISCOUNTED RATES	Discounted rate for additional thought leadership sponsorship opportunities - including sponsored sessions and roundtables	15%	10%			
	Discounted rate for additional branding opportunities including lanyards and badges	15%	10%			
	Discounted rate for additional networking opportunities including refreshment breaks and networking receptions	15%	10%			
	Discounted rate for TowerXchange corporate membership	15%	12%	10%		
		£34,500.00	£26,500.00	£22,200.00	£14,400.00	£9,775.00



Towerco meet and greet

Held as both pre-event video conferences or on-site closed-door sessions, towerco meet and greet sessions give sponsors and exhibitors intimate access to the biggest buyers/ customers who are attending the Meetup. The Q&As offer an opportunity to question towercos on their specific procurement plans, technology requirements or operational challenges and aid sponsors and exhibitors in better preparing for one-to-one on-site meetings.



Limited speaking slots and roundtable hosting positions

Subject to approval by the Meetup research team, a limited number of speaking slots and roundtable hosting positions exist for top tier sponsors. Topics and eligibility need to be discussed in depth to ensure the integrity of the Meetup program is preserved.



Pre-event attendee breakdown and analysis

A pre-event brief and guide prepared exclusively for event sponsors and exhibitors. Gain an invaluable primer to the big issues towercos are looking to tackle at this year's Meetup, benefit from a walk-through of the key buyers who will be on site, and understand the conversations they're looking to have. This pre-event brief enables you to best prepare for the two-day Meetup.



Dragon's Den

Replicating the popular TV program, the Dragon's Den offers an opportunity to deliver a five-minute pitch to panel of expert towerco dragons in front of our delegate audience. Following the pitch, our Dragons will question the presenter and outline how they could see the solution working for their business



Facilitated introductions

Only available to top tier sponsors, leverage TowerXchange's unparalleled relationships and network in the field to receive personalised one-to-one introductions to your top prospects



Thought leadership interviews and white papers

Schedule an interview with TowerXchange's research team or share a white paper, demonstrating your expertise in a given field. Our marketing team will work to expand the reach of your piece to not only event attendees but also through our membership group, extensive database, social media channels, website platforms, newsletters and other activities.



Exhibition space and meeting rooms

Each Meetup has an associated exhibition. Secure a prime spot to showcase your product or run a demo, or book a private meeting room to hold one-to-one meetings with key clients and prospects



Prominent branding & networking opportunities

Take advantage of a variety of bolt-on options to increase your brand presence on-site and really make a statement. Whether you are looking to sponsor the lanyards or badges to ensure your brand is front of mind; host a networking event to facilitate those all-important introductions; or strategically position your company as a thought leader shaping the industry, there are several options to choose from to ensure you take centre stage.

BRANDING	Lanyards
	Badges
	Delegate bags
NETWORKING	Dinner sponsorship
	Breakfast sponsorship
	Coffee break sponsorship
	Lunch sponsorship
THOUGHT LEADERSHIP	Drinks reception
	Roundtable session
	Panel Session
	TowerXchange Corporate Membership



All sponsorship and exhibition opportunities can be tailored to meet your specific business development and marketing goals.

Contact **Rachael Lupton**, Head of Sales to find out more rachael.lupton@towerxchange.com

Tower  Xchange