

TowerXchange Meetup Europe Agenda

London | Day one - April 9, 2019



Time	Session	Breakouts
08:00 - 09:00	Registration and welcome coffee	
09:00 - 09:40	TowerXchange's analysis of the European tower market ■ Kieron Osmotherly, CEO, TowerXchange ■ Frances Rose, Head of Europe, TowerXchange	
09:40 - 10:20	TowerXchange European CEO panel: our vision for the future of infrastructure in Europe ■ Moderator: Darragh Stokes, Managing Partner, Hardiman Telecommunications ■ Giovanni Ferigo, CEO, INWIT ■ Alexander Chub, President, Russian Towers ■ Rhys Phillip, CEO, CTIL ■ Bruno Jacobfeuerborn, CEO, Deutsche Funkturm	
10:20 - 10:35	Update from the EWIA ■ Olivier Huart, CEO, TDF and Chair, EWIA	
10:35 - 10:55	Indoor and outdoor small cells in the UK market ■ Graham Payne, CEO, Digital Colony UK Digital Infra Platform	
10:55 - 11:15	Fireside chat with Cellnex Telecom CEO, Tobias Martinez	
11:15 - 11:35	Enabling fast track 5G rollout through lean site strategies ■ Quan Yao, VP of Network Energy Domain, Huawei Technologies Co. Ltd	
11:35 - 12:00	Networking break sponsored by	
12:00 - 13:00	Roundtable Session I	
13:00 - 14:00	Networking lunch	
14:00 - 15:00	Roundtable Session II	Working Group: Enabling collaboration between neutral host infrastructure providers and local government in the context of 5G
15:00 - 15:30	Networking break sponsored by	
15:30 - 16:15	Panel discussion: Sale and leaseback vs carveout: evaluating the pros and cons for MNOs ■ Moderator: Nick Elverston, Partner, Ashurst ■ Jörg Weber, SVP Investment Management, Deutsche Telekom ■ Alex Mestre, General Manager, Global Business, Cellnex Telecom ■ Pat Coxen, CEO, MBNL	15:30 - 17:00 Breakout session: Meeting of the International Digital Infrastructure Alliance (IDIA) Room J
16:15 - 17:00	Panel discussion: who is investing in European infrastructure today? How and why is this changing? ■ Moderator: David Martin, Infrastructure M&A Partner, Linklaters ■ Christopher Ehrke, Partner, Arcus Infrastructure Partners ■ Bruno Cades, Partner, InfraVia Capital Partners ■ Simon Soder, Partner, Antin Infrastructure Partners ■ Tomas Budnik, CTO, PPF	
17:00	TowerXchange Meetup Europe drinks reception	
19:30	TowerXchange networking dinner: Wahaca Islington (nb separate booking required). 68-69 Upper St, London N1 0NY (2 minute walk). Leave Business Design Centre main entrance and walk down the steps to Upper Street, at the bottom of the steps turn left and it's a few doors down on your left.	

Online networking tool:

www.moreconference.com/signin/register/c/towerxchange-meetup-europe-2019 quote the email address you used to register and use morecode: 32B9D. The platform will remain live until two weeks after the event.




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TowerXchange Meetup Europe Agenda



London | Day two - April 10, 2019

Day and time	Session	Breakouts	
08:30 - 09:00	Welcome coffee		
09:00 - 09:40	Panel: 5G economics – what is needed to kick start the massive investment needed for 5G infrastructure rollout? ■ Moderator: Pankaj Agrawal, Partner, Capitel ■ David Crawford, MD, Telecoms & M2M, Arqiva ■ Oscar Pallarols, Global Commercial Director, Cellnex Telecom ■ Alastair Davidson, Director, Wireless Infrastructure Group ■ Pat Coxen, CEO, MBNL		
09:40 - 10:25	Panel: European infrastructure convergence: collaborate or compete? ■ Moderator: Doug Dimitroff, Partner, Phillips Lytle LLP ■ David Porte, SVP International, SBA Communications ■ Jose A. Aranda, Product Strategy & Innovation Director, Cellnex Telecom ■ Cara Mascini, CEO & Founder, EdgeInfra ■ Graham Payne, CEO, Digital Colony UK Digital Infra Platform ■ Laurent Benet, Head of Strategy, Innovation & Business, ATC France		
10:25 - 10:45	<p style="text-align: center;">10:25-13:15 Invitation-only breakout session: Investment Hub Supported by</p>   		
10:45 - 11:25			Indoor digitalization: the road to 5G ■ Zhibing Xu, VP of Small Cell Domain, Huawei Technologies Co. Ltd
10:45 - 11:25			Panel: M&A in European communications infrastructure: multiples, opportunities and longevity ■ Moderator: Darragh Stokes, Managing Partner, Hardiman Telecommunications ■ Kevin Smithen, Managing Director, Digital Colony ■ Paolo Crochetti, Head of Institutional Affairs, EI Towers ■ Jonathan Dann, Managing Director, Greenhill & Co
11:25 - 11:55	Networking break sponsored by accruent		
11:55 - 12:55	Roundtable session III	Working group: Changing operational needs in Europe: resilience, technology and the shifting scope of infrastructure offerings	
12:55 - 14:00	Networking lunch		
14:00 - 15:00	Roundtable Session IV	Working Group: Data utilisation and visualisation	
15:00 - 15:30	Networking Break		
15:30 - 16:15	Panel: exploring partnerships to unlock the value of existing infrastructure (street poles, ducting, billboards etc) ■ Moderator: Anders Smedberg, CEO, Tarantula ■ Marc Merlini, Director Business Development, JCDecaux ■ Graham Thrower, Head of Infrastructure and Investment, Urban Foresight ■ Paul Ayres, COO, Connected Kerb		
16:15 - 17:00	Panel: European new build: the changing shape of infrastructure and what a more diverse portfolio means for passive infrastructure owners ■ Moderator: Spencer Crawford-White, CTO, Delmec ■ Jonathan Freeman, Customer Infrastructure Programmes Director, Arqiva ■ Timur Shikov, Head of Strategy, Russian Towers ■ Tony Killarney, CEO, Towercom		
17:00	End of Meetup		

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TowerXchange roundtables



Roundtable Session One: 9 April

1A Olivier Huart, CEO, TDF How collaboration can drive growth in wireless infrastructure

1B Natalie Lamb, Senior Lawyer, and Robert Dixon, Partner, Vinson & Elkins RLLP MLA/MSA implications in light of IFRS16

1C Colin Cunningham, CEO, Cignal The economics of rural rollout in Europe

1D Darragh Stokes, Managing Partner, Hardiman Telecommunications What's an MNO to do? Carve outs vs JVs vs sale and leaseback

1E David Porte, SVP International, SBA Communications Comparing the pros and cons of cross-border portfolios and the scale needed to make them work

1F Paolo Crochetti, Head of Institutional Affairs, EI Towers The operational challenges of urban rollout

1G Cara Mascini, CEO and Founder, EdgeInfra Defining the scope of '5G infrastructure' and identifying the verticals which sit most closely together

1H Laurent Benet, Head of Strategy, Innovation and Business Development, ATC France Managing relationships between multiple stakeholders when rolling out in urban areas

1J Antony Tomlinson, CEO, Ontix Who / what needs to change if we want small cell densification to happen now?

Roundtable Session Two: 9 April

2A Mirko Masi, Director Technology, Global Operations, Cellnex Telecom The new service challenges of convergence: ensuring efficiency and excellent customer service as towercos diversify across new verticals

2B Rhys Phillip, CEO, CTIL and Denis Coakley, COO, CTIL Upgrading passive infrastructure ahead of 5G rollout

2C Jonathan Dann, Partner, Greenhill Capital IPOs: on the agenda for 2019?

2D Anders Smedberg, CEO, Tarantula Managing tower portfolios as digital infrastructure enters a state of flux

2E Doruk Sazer, Head of Strategy, Global Tower How towercos need to transform to meet the developing needs of new and existing tenants

2F Jorge Jimenez, CEO, Axion How independent ownership can enable existing infrastructure to deliver better against 5G needs

2G Christopher Ehrke, Partner, Arcus Infrastructure Partners Investing in digital infrastructure in Europe

2H Gulfray Qayyum, Managing Director TMT, CitiGroup How new infrastructure models in Europe are being driven by a shift in towerco/MNO dynamics

2J Michele Vitale, Head of IR, INWIT Italy

Working Group: Enabling collaboration between neutral host infrastructure providers and local government in the context of 5G

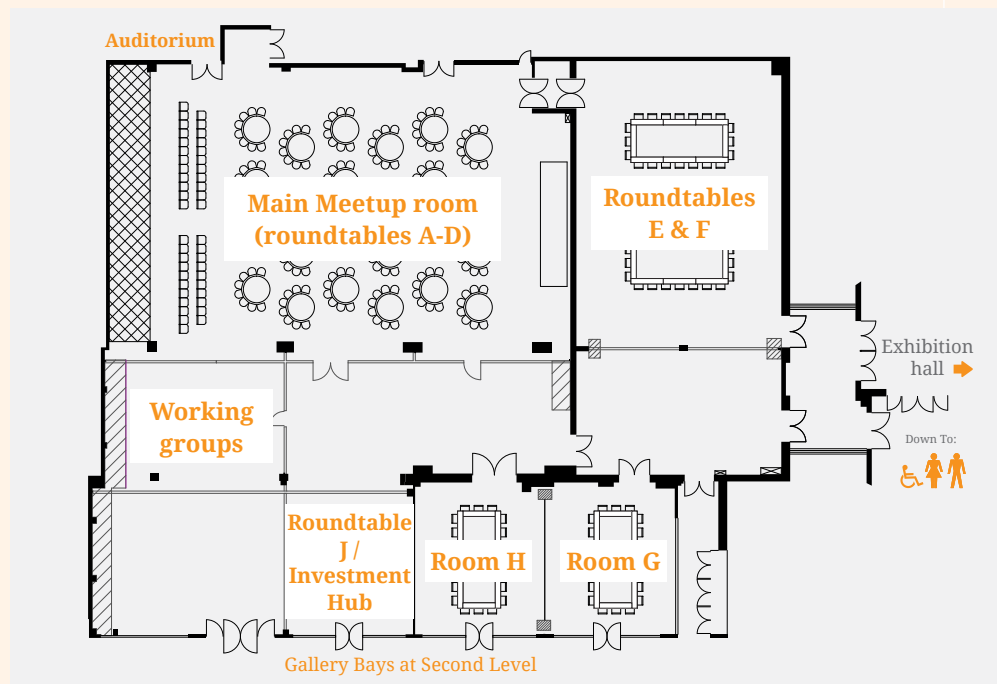
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TowerXchange roundtables



Roundtable Session Three: 10 April

- 3A Johnny Ekstrom, CFO, TT Networks Scandinavia**
- 3B Paul Ayres, COO, Connected Kerb** The role of startups in the digital infrastructure mix
- 3C Spencer Crawford-White, CTO, Delmec** How will skill requirements change as portfolios evolve and what are towercos, MNOs and service providers doing to keep their skills mix relevant?
- 3D Rani Ariss, VP EMEA, Acsys International Ltd** Managing site access and security as increasing numbers of towers become considered critical national infrastructure
- 3E Alexander Chub, President, Russian Towers** Identifying the use cases which will drive 5G rollout and the demands they will put on the network

- 3F Graham Payne, CEO, Digital Colony UK** Digital Infra Platform Indoor and outdoor small cells
- 3G Terry Rhodes, CEO, Eaton Towers** Towerco value growth: opportunities in consolidation, acquisition and build to suit
- 3H Jason Day, VP Sales, Telecom and Utilities, Accruent** Collecting and utilizing data to deliver efficiency at both site and organizational level
- Working Group:** Changing operational needs in Europe: resilience, technology and the shifting scope of infrastructure offerings

Room J: Investment Hub

Roundtable Session Four: 10 April

- 4A Arthur Akopyan, Managing Director, UFG Russia**
- 4B Alex Rabbetts, Managing Director, European Data Centre Association** Datacentres 101
- 4C Conor Plant, Managing Partner, Hardiman Telecommunications** Where next? Identifying the European geographies which could support independent towerco growth
- 4D Akshay Grover, Chief Investment Officer, iSON towers** Emerging markets
- 4E David Crawford, MD Telecoms and M2M, Arqiva UK**
- 4F Nikolay Berdin, CEO, Service-Telecom** Who is best placed to roll out new towers and points of presence in Europe? MNOs, JVs, carve outs or independent towercos?
- 4G Tony Kilarney, CEO, Towercom Ireland**
- 4H Dmitry Popov, Head of Technical Department, Russian Towers** Managing the proliferation of points of presence needed for 5G rollout: power, equipment and integration

Working Group: Data utilisation and visualisation

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