

Infrastructure Deal Bonanza: What It Means For Towers Globally

By NSR Team | May 11, 2019

Nearly \$20BN of telecom infrastructure changed hands this week through two large deals: Cellnex acquired all of Xavier Niel's towers in Europe, and a consortium of private equity funds acquired Zayo in the US. In this weekly review, we discuss the implications of these deals on the communications infrastructure landscape globally, and why they support our stance that SBAC is the most compelling opportunity within towers.

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Full 12-month historical recommendation changes are available on request

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