Sustainable business strategy
Driving the growth of communications in Africa
Our experienced Leadership Team

Strong localised management teams

Ramsey Koola  
MD HT Tanzania  
• Joined 2015

Colard Nkole  
MD HT Congo B  
• Joined 2011

Fritz Dzeklo  
MD HT Ghana  
• Joined 2012

Marinus Gieselbach  
MD HT South Africa  
• Joined 2019

Philippe Loridon  
CEO East & West Africa  
• Joined 2011

Marlene Kinillo-Zounon  
CEO Central Africa  
• Joined 2020

Sainesh Vallabh  
CEO Southern Africa  
• Joined 2020

Supplemented by strong group leadership and expertise

Paul Barrett  
General Counsel and Company Secretary  
• Joined 2020

Jeffrey Schumacher  
Director of Commercial  
• Joined 2011

Roy Cursley  
Director of Technology  
• Joined 2015

Neil Conquest  
Director of Delivery  
• Joined 2015

Tom Greenwood  
Chief Operating Officer  
• Joined 2010

Kash Pandya  
Chief Executive Officer  
• Joined 2015

Manjit Dhillon  
Interim Chief Financial Officer  
• Joined 2016

Nick Summers  
Director of Sustainability & Organisational Development  
• Joined 2010

Sima Varsani  
Group Sustainability Manager  
• Joined 2020

100+ Years’ Experience of Towers and Power in Emerging Markets
Agenda

1. Helios Towers at a glance

2. Mobile and Sub-Saharan Africa
   Case study: Driving the digital economy in DRC

3. An integrated sustainable business strategy
   Case study: Employment and development opportunities

4. Our KPIs and targets

5. Future opportunities and Q&A
Helios Towers at a glance
Helios Towers at a glance

We promote infrastructure sharing by having multiple mobile network operators (MNOs) on tower sites, delivering cost benefits as well as reduced environmental impact.

WHAT WE DO

1. Build and acquire towers
2. MNO (anchor tenant) places its active equipment on the tower
3. Additional tenants add active equipment to the tower
4. Tenants modify or add equipment to the tower
5. We provide power solutions to meet tenant needs

OUR CUSTOMERS INCLUDE

- airtel
- tigo
- Orange
- MTN
- vodacom

OUR VALUES
8,842 towers across 6 markets (PF Senegal)

- **Tanzania ★** 3,772 sites
- **Democratic Republic of Congo (DRC) ★** 1,871 sites
- **Ghana** 973 sites
- **Congo Brazzaville ★** 415 sites
- **South Africa** 191 sites
- **Senegal* ★** 1,620 sites

★ = market leader

*In August 2020, Helios Towers signed an agreement to acquire a portfolio of 1,220 existing sites in Senegal + 400 committed BTS sites.*
Mobile and Sub-Saharan Africa
The mobile market in Sub-Saharan Africa

**MOBILE INDUSTRY CONTRIBUTION TO GDP**

- **2019**: $155bn
- **2024**: $184bn

9% of GDP*

**PUBLIC FUNDING**

- **2019**: $17bn

Mobile ecosystem contribution to public funding
(before regulatory and spectrum fees)

**EMPLOYMENT**

- **2019**: 650,000 jobs

Jobs formally supported by the mobile ecosystem

1.4m+ informal jobs

*Compared to mobile contributing 4.7% to global GDP

Mobile drives socio-economic development

- Drives economic growth
- Empowers women
- Reduces poverty
- Enables access to health
- Enables financial inclusion
- Enhances education and skills
- Digital identity
- Enables access to utilities
- Humanitarian assistance
- Helps mitigate climate change

GSMA 2019 Mobile Industry Impact Report: Sustainable Development Goals
GSMA 2020 Mobile Industry Impact Report: Sustainable Development Goals
But there’s a persistent digital divide

Population of Sub-Saharan Africa: 1.04bn

- 272m: 26% Mobile internet subscribers
- 512m: 49% Covered but do not use the internet
- 262m: 25% Not covered

Rural populations are 60% less likely to use mobile internet than urban populations

Women are 37% less likely to use mobile internet than a man

1. GSMA The Mobile Economy Sub-Saharan Africa 2020
2. GSMA The State of Mobile Internet Connectivity 2020
Case study: Driving the digital economy in DRC

DRC at a glance

100m+ population

70% of the population under the age of 30

7th largest city in the world by 2035

50% of the country has mobile coverage

1,871 HT sites

1. Source: Worldpop
2. UN prediction

Hear more from Patricia Nzolantima, Founder of Ubiz cabs
www.heliostowers.com/videos/
An integrated sustainable business strategy
Delivering on our purpose

Our purpose: **Drive the growth of communications in Africa**

We play a pivotal role in advancing African mobile telecoms services and contributing to social and economic development in our markets.

- **100%** African employees in our operating companies
- **97%** local employees in our operating companies
- **107 million** people covered by our towers
- **8,700** partners and contractors
- **400+** employees
- **15,082** (16,757 PF*) tenancies
- **7,222** (8,842 PF*) sites

*Pro forma for Senegal: 1,220 existing sites and associated tenancies + 400 committed BTS.*
Strategy development and materiality

Materiality matrix

Significance of Helios Towers’ economic, environmental and social impacts
Sustainable business strategy

BUSINESS EXCELLENCE AND EFFICIENCY
• Innovating for our customers’ needs
• Maximising delivery of a continuous network service
• Minimising our environmental impact

NETWORK ACCESS AND SUSTAINABLE DEVELOPMENT
• Growing our business and helping more people connect to a mobile network
• Supporting our communities

EMPOWERED PEOPLE AND PARTNERSHIPS
• Promoting a safe, diverse team
• Supporting our people and partners to reach their full potential
• Working to the highest ethical, social and environmental standards
Supporting global sustainable development

Through our core business, we contribute to:

- **SDG 8**: Decent Work and Economic Growth
- **SDG 9**: Industry, Innovation and Infrastructure

We also support seven other Goals:

- **SDG 3**: Good Health and Well-Being
- **SDG 4**: Quality Education
- **SDG 5**: Gender Equality
- **SDG 7**: Affordable and Clean Energy
- **SDG 13**: Climate Action
- **SDG 16**: Peace, Justice and Strong Institutions
- **SDG 17**: Partnerships for the Goals

Read more about our contribution to the Goals: [www.heliostowers.com/sustainability](http://www.heliostowers.com/sustainability)
Case study: Employment and development opportunities

Group:
100% African employees in our operating companies
~50% of our people trained in Lean Six Sigma

Ghana:
100% Ghanaian team
56% women in management positions

Personal HT career development:
Our KPIs and targets
Business excellence and efficiency

Resilience, continuity and innovation for long-term business performance and growth

CUSTOMER SATISFACTION AND ECONOMIC PERFORMANCE

<table>
<thead>
<tr>
<th>KPIs</th>
<th>Targets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tenancy ratio</td>
<td>Achieve an average one-minute weekly downtime per tower by the end of 2025&lt;sup&gt;1&lt;/sup&gt;</td>
</tr>
<tr>
<td>Adjusted EBITDA margin</td>
<td>All new towers to have an average of two tenants per tower within five years of construction&lt;sup&gt;2&lt;/sup&gt;</td>
</tr>
</tbody>
</table>

CLIMATE ACTION

| Target                | Analyse carbon footprint and climate risk across our value chain and set an emissions reduction target in 2021 |

WE'RE CONTRIBUTING TO:

1. The Group has five years to achieve this for any new network acquisition.
2. This target excludes special projects and smaller, unique build-to-suit projects.
Network access and sustainable development

Increasing connectivity to improve livelihoods and strengthen economies

**DELIVERING MOBILE CONNECTIVITY**

<table>
<thead>
<tr>
<th>KPI</th>
<th>Population coverage¹</th>
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<tbody>
<tr>
<td><strong>TARGETS</strong></td>
<td>Expand to 12,000+ towers in 8+ markets by the end of 2025</td>
</tr>
<tr>
<td></td>
<td>• Increase the number of sites in rural and underserved regions by 1,500 by the end of 2025</td>
</tr>
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**LOCAL COMMUNITY ENGAGEMENT**

<table>
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<th>TARGETS</th>
<th>Develop bespoke community needs-based partnerships in 2021</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>• Pilot phone-charging points for free community use on selected sites in 2021²</td>
</tr>
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**WE’RE CONTRIBUTING TO:**

1. Population figures have been calculated using WorldPop estimates 2020: [https://www.worldpop.org/](https://www.worldpop.org/)
2. Where grid power is not readily available.
Empowered people and partnerships

Building a network for shared success, with safety as a priority for all

HEALTH AND SAFETY

| TARGET | All maintenance partners to achieve ISO 45001 certification and 100% in the Helios Towers SHEQ assessment by the end of 2025¹ |

SAFE AND RESPONSIBLE SUPPLY CHAIN

| TARGET | Assess all key suppliers against sustainability criteria by the end of 2022 |

EMPLOYEE ATTRACTION AND DEVELOPMENT

| KPIs | Percentage of local employees in our operating companies |
| Diversity, of gender and ethnicity, in management positions |
| Percentage of employees trained in Lean Six Sigma |

WE’RE CONTRIBUTING TO:

1. SHEQ: Safety, Health, Environment and Quality. New maintenance partners have three years to achieve ISO 45001 from start of contract with HT.
"We are determined to grow responsibly; to build towers considerately and to maintain them efficiently. We act with integrity, complying with, and typically exceeding, all legal requirements."

Samuel Jonah, KBE, OSG. Chair

**GOVERNANCE STRUCTURE**

- **Plc Board**
  - Ultimate accountability for sustainable business strategy

- **Executive Team**
  - Sets and executes vision and strategy for sustainable business

- **Group Functions and Local Markets**
  - Implements strategy and provides feedback to executive team

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**ANTI-BRIBERY AND CORRUPTION**

<table>
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<th>Target</th>
<th>Maintain our accreditations in four management systems:</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>- ISO 9001 (Quality)</td>
</tr>
<tr>
<td></td>
<td>- ISO 14001 (Environmental management)</td>
</tr>
<tr>
<td></td>
<td>- OHSAS 18001 (Health &amp; Safety management)</td>
</tr>
<tr>
<td></td>
<td>- ISO 37001 (Anti-Bribery)</td>
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</tbody>
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**WE'RE CONTRIBUTING TO:**
Future opportunities and Q&A
Exploring opportunities to drive our progress

**BUSINESS EXCELLENCE AND EFFICIENCY**
- Setting an emissions reduction target
- Climate risk assessment using TCFD recommendations
- CDP

**GOVERNANCE AND REPORTING**
- Sustainable Business Report launch in Q1 2021
- Aligning performance management with sustainable business goals
- UN Global Compact

**NETWORK ACCESS AND SUSTAINABLE DEVELOPMENT**
- Exploring community projects and partnerships to maximise our positive impact
- Human rights impact assessment

**EMPOWERED PEOPLE AND PARTNERSHIPS**
- Supplier and customer engagement on sustainable business
- Diversity and inclusion awareness initiatives
Communications and reporting

Strategy Summary PDF

Building, acquiring and operating telecommunications infrastructure

Our impact

- 100% domestic coverage
- 97% population covered
- 8.7 million
- 413
- 7.992
- 14,906

Business excellence and efficiency

Resilience, continuity and innovation for long-term business performance and growth

Due to be published in Q1 2021 alongside our Annual Report and Accounts
Thank you