



# Sustainable business strategy

Driving the growth of  
communications in Africa



# Our experienced Leadership Team

 Speaking today

## 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 Lordon**  
CEO East & West Africa  
• Joined 2011



**Marlene Kiniffo-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

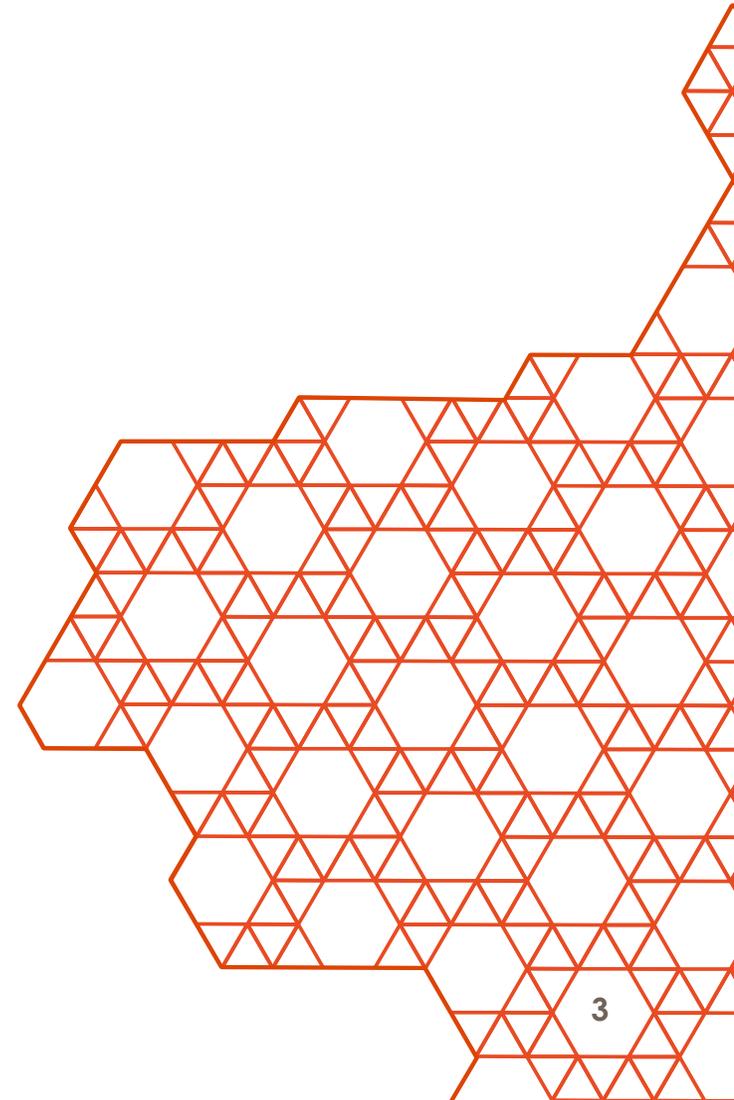


**Sima Varsani**  
Group Sustainability Manager  
• Joined 2020

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**



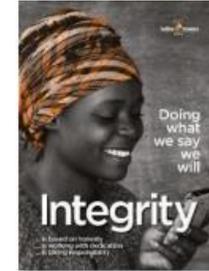
# Helios Towers at a glance



# 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.

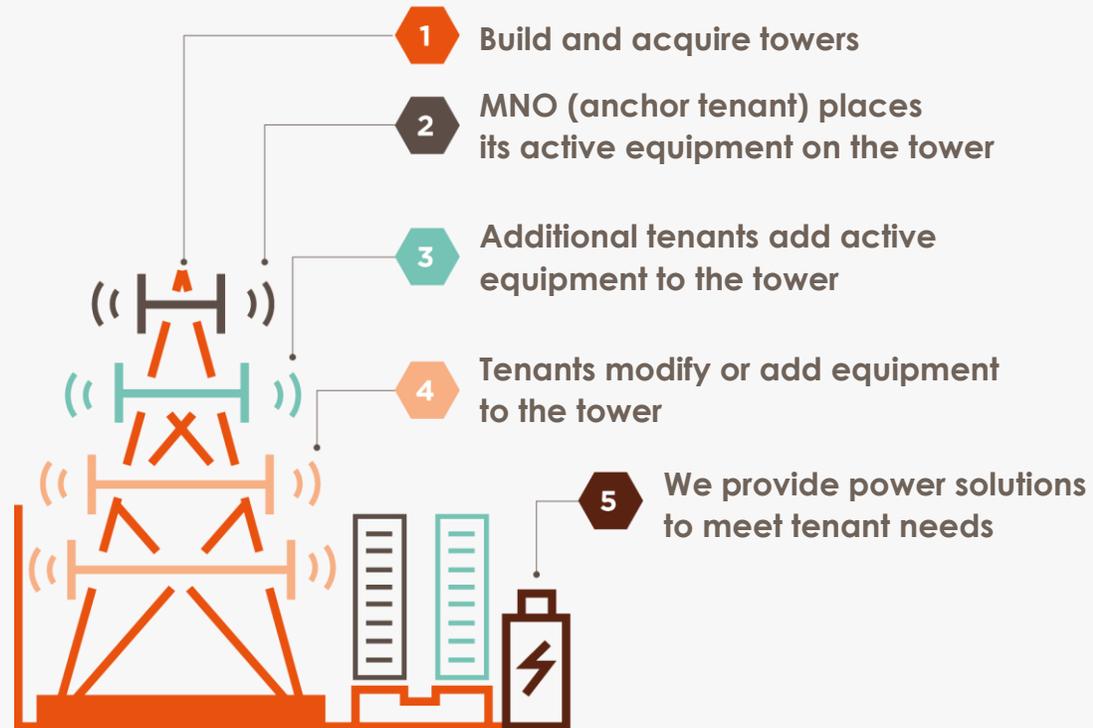
## OUR VALUES



## OUR CUSTOMERS INCLUDE



## WHAT WE DO



# 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, Heliös 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



## PUBLIC FUNDING

2019

\$17bn

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



## EMPLOYMENT

2019

650,000

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

SDG mobile impact scores

2019 Impact Score



[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



## DIGITAL DIVIDE<sup>1</sup>

- 26% Mobile internet subscribers
- 49% Covered but do not use the internet
- 25% Not covered



Rural populations are 60% less likely to use mobile internet than urban populations<sup>2</sup>



Women are 37% less likely to use mobile internet than a man<sup>2</sup>

<sup>1</sup>. GSMA The Mobile Economy Sub-Saharan Africa 2020

<sup>2</sup>. GSMA The State of Mobile Internet Connectivity 2020

# Case study: Driving the digital economy in DRC

## DRC at a glance

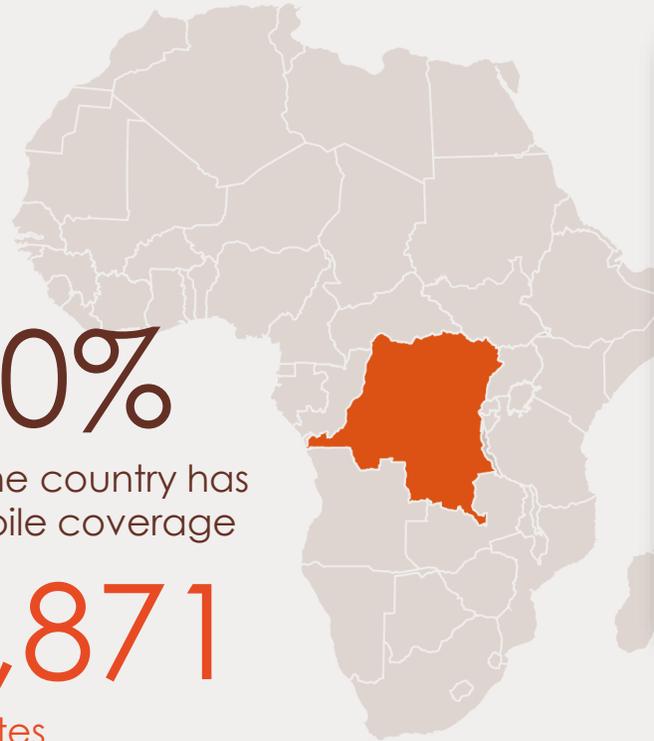
100m+  
population<sup>1</sup>

70%  
of the population  
under the age of 30

7th  
largest city in the world  
by 2035<sup>2</sup>

50%  
of the country has  
mobile coverage

1,871  
HT sites



Hear more from Patricia Nzolantima,  
Founder of Ubiz cabs  
[www.heliostowers.com/videos/](http://www.heliostowers.com/videos/)

1. Source: Worldpop  
2. UN prediction



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

7,222

(8,842 PF\*)

sites

15,082

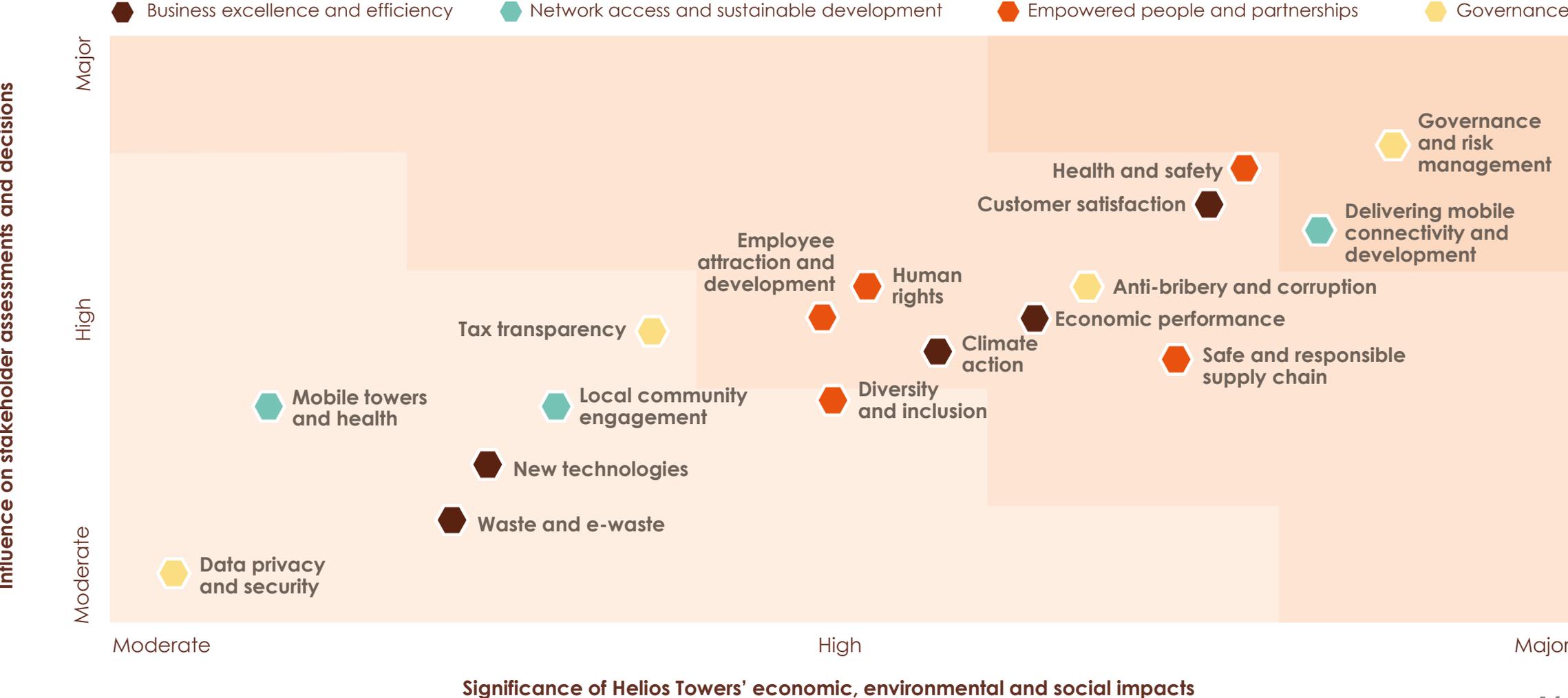
(16,757 PF\*)

tenancies

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

# Strategy development and materiality

## Materiality matrix



# 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

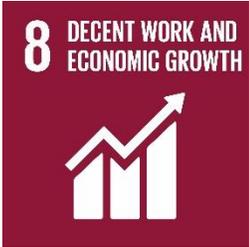
## EMPOWERED PEOPLE AND PARTNERSHIPS

- 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



Read more  
about our  
contribution to  
the Goals:

[www.heliostowers.com/sustainability](http://www.heliostowers.com/sustainability)

We also support seven other Goals



**SDG 3**  
Good Health  
and Well-Being



**SDG 5**  
Gender Equality



**SDG 13**  
Climate Action



**SDG 17**  
Partnerships for  
the Goals



**SDG 4**  
Quality  
Education



**SDG 7**  
Affordable and  
Clean Energy



**SDG 16**  
Peace, Justice and  
Strong Institutions

# 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:

Project Manager (2012) ▶ Head of Projects (2014) ▶  
Secondment to Tanzania (2016) ▶ Managing Director (2019)



[www.heliostowers.com/videos/](http://www.heliostowers.com/videos/)

# Our KPIs and targets





# Business excellence and efficiency

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

## CUSTOMER SATISFACTION AND ECONOMIC PERFORMANCE

<b>KPIs</b>	Tenancy ratio
	Adjusted EBITDA margin
<b>TARGETS</b>	Achieve an average one-minute weekly downtime per tower by the end of 2025 <sup>1</sup>
	All new towers to have an average of two tenants per tower within five years of construction <sup>2</sup>

## CLIMATE ACTION

<b>TARGET</b>	Analyse carbon footprint and climate risk across our value chain and set an emissions reduction target in 2021
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### WE'RE CONTRIBUTING TO:

**7** AFFORDABLE AND CLEAN ENERGY

**9** INDUSTRY, INNOVATION AND INFRASTRUCTURE

**13** CLIMATE ACTION

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

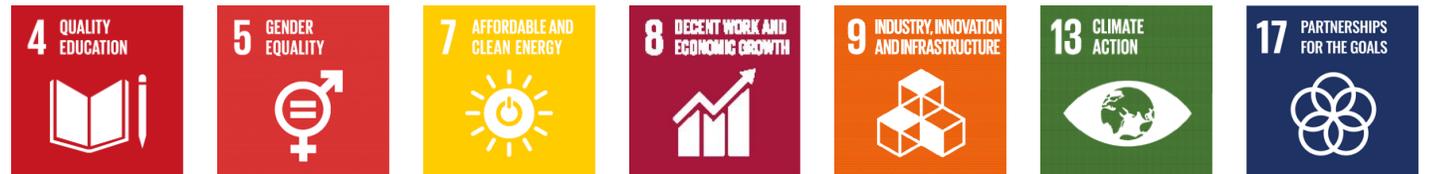
## DELIVERING MOBILE CONNECTIVITY

<b>KPI</b>	Population coverage <sup>1</sup>
<b>TARGETS</b>	Expand to 12,000+ towers in 8+ markets by the end of 2025
	<ul style="list-style-type: none"> <li>Increase the number of sites in rural and underserved regions by 1,500 by the end of 2025</li> </ul>

## LOCAL COMMUNITY ENGAGEMENT

<b>TARGETS</b>	Develop bespoke community needs-based partnerships in 2021
	<ul style="list-style-type: none"> <li>Pilot phone-charging points for free community use on selected sites in 2021<sup>2</sup></li> </ul>

### WE'RE CONTRIBUTING TO:



1. Population figures have been calculated using WorldPop estimates 2020: <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 2025<sup>1</sup>

## SAFE AND RESPONSIBLE SUPPLY CHAIN

### TARGET

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

## EMPLOYEE ATTRACTION AND DEVELOPMENT

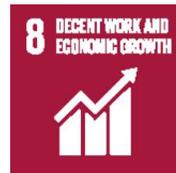
### KPIs

Percentage of local employees in our operating companies

Diversity, of gender and ethnicity, in management positions

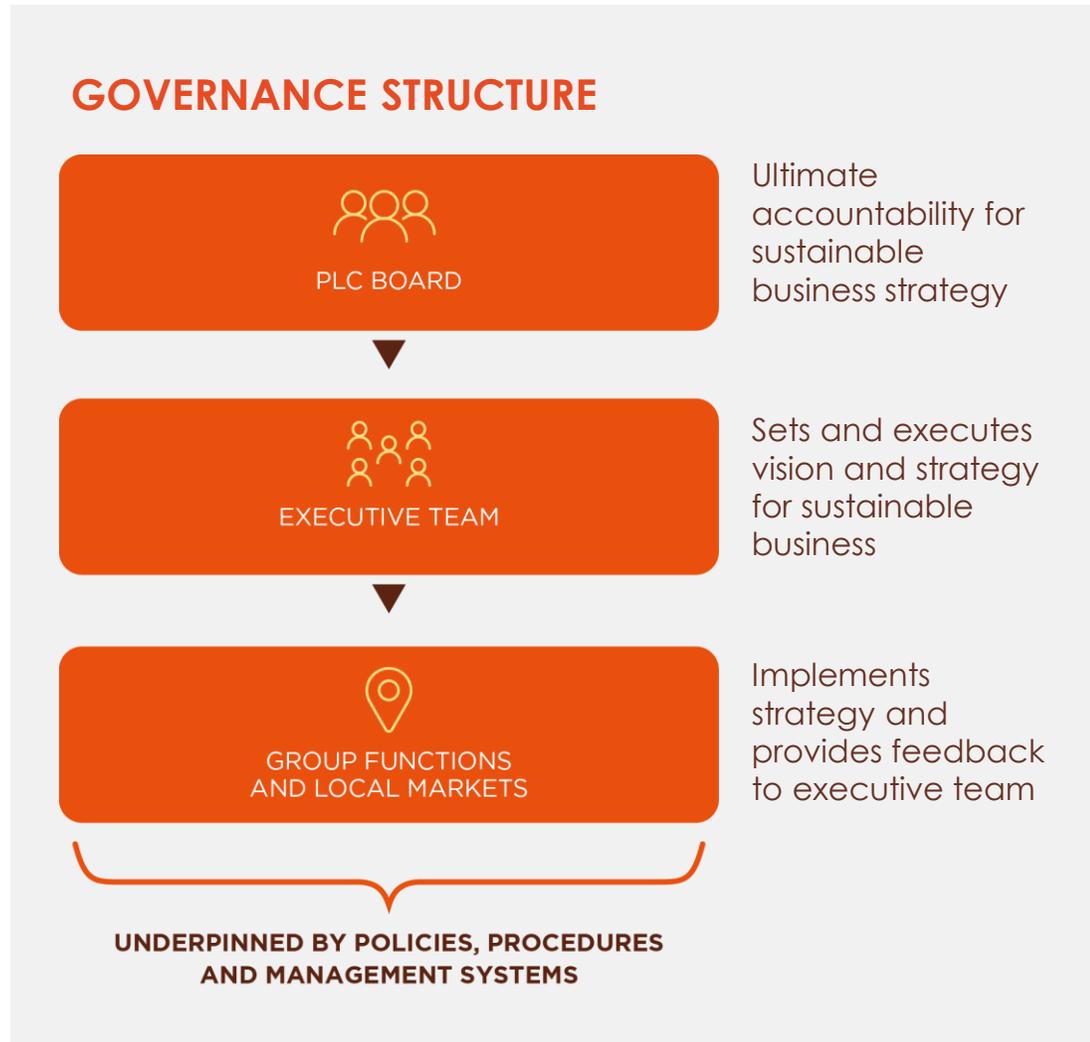
Percentage of employees trained in Lean Six Sigma

## 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.

# Governance and culture



“We are determined to grow responsibly; to build towers considerably and to maintain them efficiently. We act with integrity, complying with, and typically exceeding, all legal requirements.”

**Samuel Jonah, KBE, OSG. Chair**

## ANTI-BRIBERY AND CORRUPTION

<b>TARGET</b>	Maintain our accreditations in four management systems: <ul style="list-style-type: none"><li>- ISO 9001 (Quality)</li><li>- ISO 14001 (Environmental management)</li><li>- OHSAS 18001 (Health &amp; Safety management)</li><li>- ISO 37001 (Anti-Bribery)</li></ul>
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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

Driving the growth of communications in Africa  
Our sustainable business strategy summary

## Strategy Summary PDF

### Building, acquiring and operating telecommunications infrastructure

Helios Towers plc provides mobile network operators (MNOs) with tower site space, power and related services. We promote infrastructure sharing by having multiple MNOs on tower sites, delivering cost benefits as well as reduced environmental impact.

We operate in some of the fastest-growing mobile markets in the world, driven by young and urbanising populations, high gross domestic product (GDP) growth and continued expansion of communications infrastructure. With minimal fixed line connectivity in Africa, mobile is the driving force in communications, and a key enabler for social and economic development.

**What we do**

- 1 Build and acquire towers
- 2 MNO (anchor tenants) place 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

The impact of the tower and the facilities provided is 20 times that of a mobile phone. [www.helios Towers.com](http://www.helios Towers.com)



### Business excellence and efficiency

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

### DRIVING BUSINESS EXCELLENCE

Increased customer demand for our services during the first half of 2020 led to an improved financial outlook of 20% more sites in 2020.

As service providers are needed for future growth and to drive operational excellence, we are expanding our existing business excellence services for Group since 2020. Our expertise in service operations is applied to the respective service partners and quality. This, in turn, allows our customers to deliver better services quality and experience to their customers. It is a benefit of business excellence that demonstrates that we are the trusted partner for the industry to grow with.

### CUSTOMER SATISFACTION AND ECONOMIC PERFORMANCE

2020

2020

Achieve an average net promoter score (NPS) of 10

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Achieve an average net promoter score (NPS) of 10

### STRATEGY IN ACTION

#### Optimising our sites for energy efficiency

2,424 (34%) OF OUR SITES USE HYBRID SOLUTIONS

462 (7%) SITES USE SOLAR POWER

#### DRIVING ENERGY EFFICIENCY AND CLIMATE ACTION

Our operations business model through which multiple operators share space on our towers, allows reduced environmental impact compared to our traditional operational model. It reduces the generator or diesel supply and the maintenance requirements, saving thousands of tonnes of carbon a month.

Our carbon footprint is reduced through which multiple operators share space on our towers, allowing reduced environmental impact compared to our traditional operational model. It reduces the generator or diesel supply and the maintenance requirements, saving thousands of tonnes of carbon a month.

#### CLIMATE ACTION

Reduce carbon footprint and climate risk across our value chain and set an emissions reduction target by 2030.

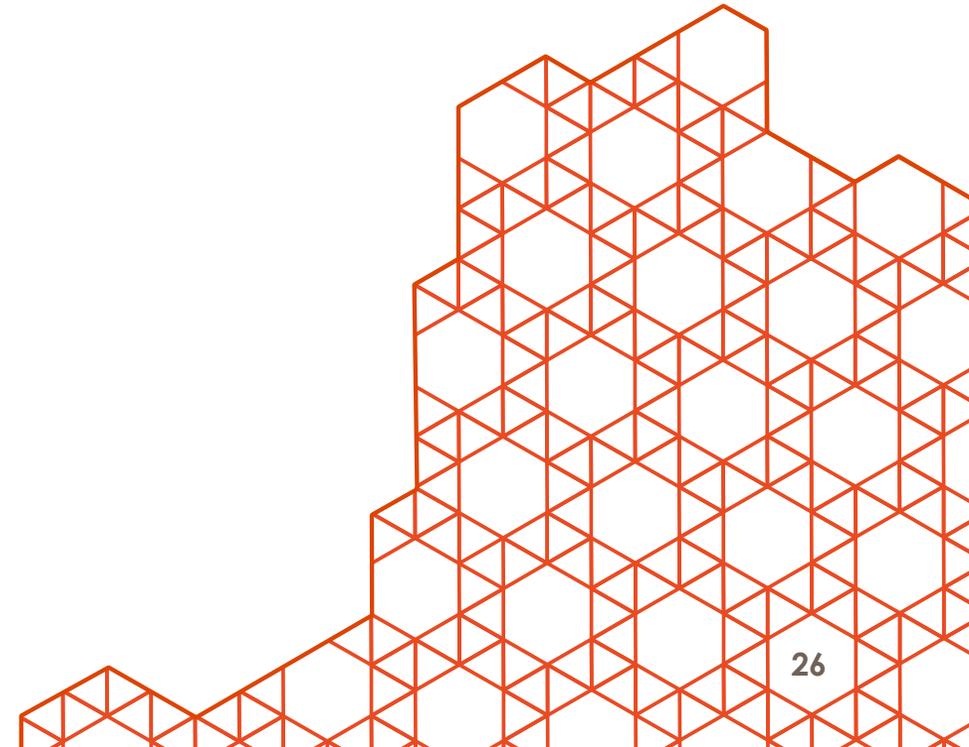
Through Business excellence and efficiency, we're contributing to:

- SDG 7: Affordable and Clean Energy
- SDG 9: Industry, Innovation and Infrastructure
- SDG 13: Climate Action

## Sustainable Business Report 2020

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

# Q&A





Thank you

