



Enterprise Platforms



Strategy recap

MTN Business has successfully repositioned as Africa's digital enabler



OUR STRATEGIC INTENT

PURPOSE

Powering Africa's businesses by providing customer centric digital solutions.

VISION

To be the fastest growing telco and trusted partner that enables Africa's business in their digital evolution.

Our **Ambition 2025**

>R30 billion

Revenue from enterprise



DEFEND & GROW
CORE BUSINESS



SECURE
FUTURE REVENUE:
CORE & ICT SERVICES



IMPROVE
CUSTOMER
SATISFACTION
& BUSINESS
INTELLIGENCE



TRANSFORM
PEOPLE, PROCESSES
& SYSTEMS



Sizing the opportunity



The addressable market has increased 4x since 2021, with ICT outpacing the traditional core services

The 5-year Market Outlook for our Top 6 has quadrupled over the past couple of years, with the pandemic accelerating the market maturity

Forecast market growth (CAGR 20'-25') in MTN footprint

Connectivity Market Sizing to 2025 (CAGR 2020-2025)

Connectivity
~R500bn*

CAGR
2020-2025



Fixed

R227.2bn
1%



Mobile

R272.3bn
7%

ICT Market Sizing to 2025 (CAGR 2020-2025 %)

ICT
~R733bn*

CAGR
2020-2025



IoT

R263.2bn
15%



Cloud

R243.2bn
23%



Security

R114bn
10%



UCC

R112.2bn
14%

Ambition 2025 execution



Securing the core and accelerating ICT solutions has paved the route to grow faster than our ambition

2020



Actual revenue

R14.5bn*

YoY
(19'-20')

14.8%

Contribution to
Group revenue

9.4%

2022



Actual revenue

R21.4bn

CAGR
(20'-22')

20%

Contribution to
Group revenue

10%

Ambition 2025



Revenue

>R30bn

CAGR**
(22'-25')

15-20%

Contribution to
Group revenue*

10-12%

*revenues at 2022 constant currency rates

**estimated ambition

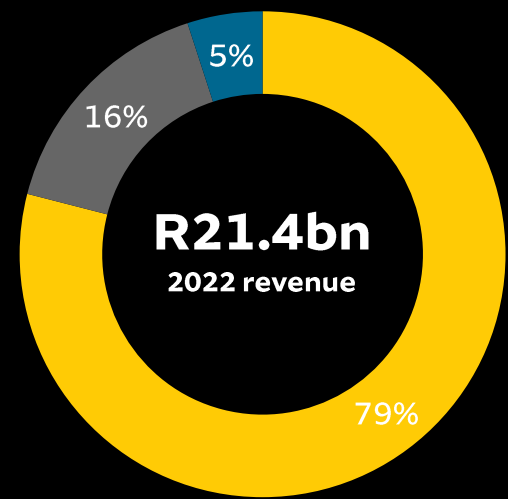
Ambition 2025 execution



Non-mobility revenues have surpassed the 20% mark. SMES and LE continue to accelerate in double digit

Services

Revenue contribution by service



■ Mobility ■ Fixed & MNS ■ ICT

Segments

Small & Medium Enterprises



<200 employees
52%*
of EBU revenue in 2022

Domestic LE/MNC Enterprises



200+ employees
48%
of EBU revenue in 2022

Main Markets



90%
of EBU Revenue in Top 7 Markets

*SMEs expected to accelerate faster than LEs due to an increase of the professionalism of trade

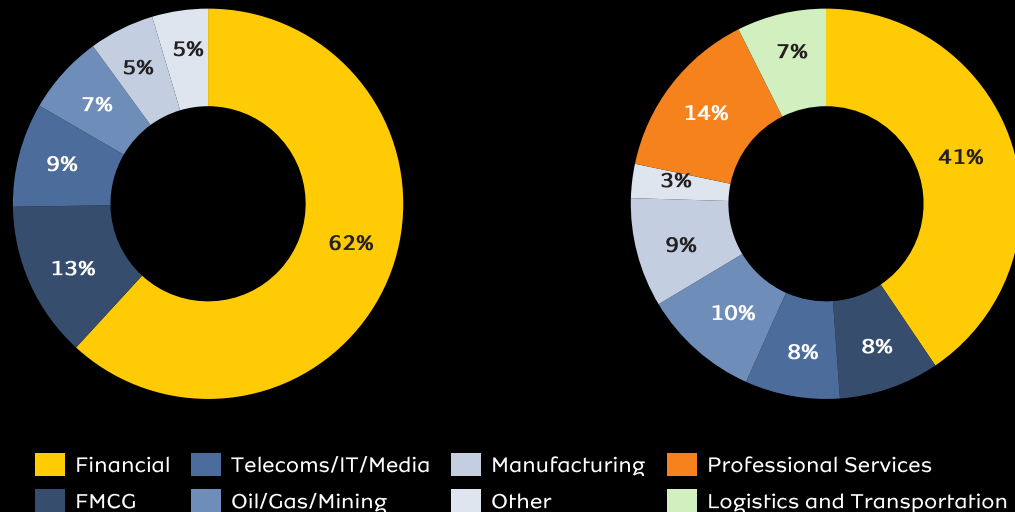
Ambition 2025 | MNC Success



Multinationals segment has continued its growth trajectory, reducing industry concentration and securing beyond R2bn in New Business in 2021 - 2022

- The MNC division has outgrown all other Segments both through organic and portfolio growth
- MNCs have moved away from the heavy industry concentration towards a more diverse and growing Industry spread

Industry diversification



NOTE: 27 MNC clients in 2020 to 45 MNC clients at the end of 2022

TOP MNC DEALS

2021 - 2022

~R 2bn TCV



Ambition 2025 execution



The ICT centre of excellence (COE) has been scaled to 6 markets, capacitated and delivering high double digit growth

- CoE fully established and being staffed aggressively in 2022 and 2023 (expected growth of 80% until eoy)
- ICT growth in double digits across our Top 6 markets, actively supported by the CoE
- IoT, UCC and Cloud accelerating faster than all other products / solutions

Footprint Expansion

From South Africa 2021 to
TOP 6 Opcos in 2022



CoE Staffing Acceleration



People

2021

20
ICT SPECIALISTS

2022

137
ICT SPECIALISTS

2023*

245*
ICT SPECIALISTS

Achievements and progress



Opcos ICT** – YoY%



SA – 11.2%



NG – 35.2%



Top 6 – 29.9%



Platforms – YoY%

IoT – 37.9%

UCC – 38.3%

Cloud – 81.2%



Connectivity
& UCC



Security
Services



Internet
Of Things



Cloud
Services

*planned
**includes MNS, cloud, IoT, UCC and fixed connectivity

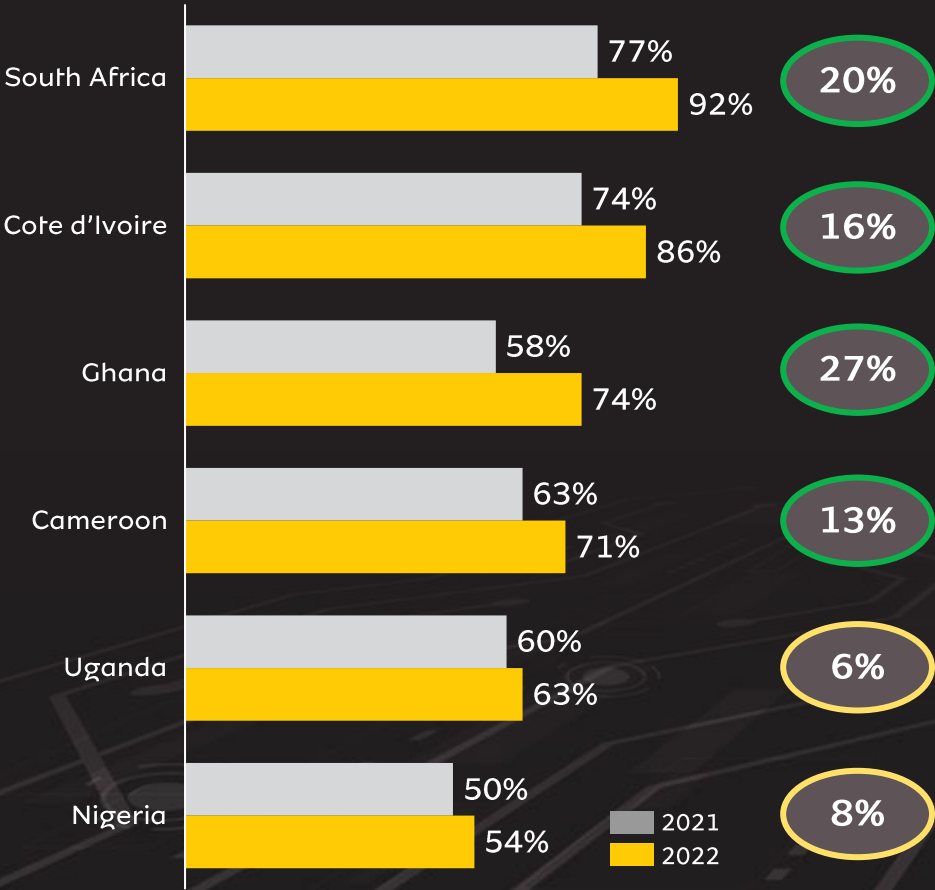
Capturing the opportunity



To accelerate our OPCO capability and capacity, our 2023-2025 focus will be placed on 4 pillars of the believe program

MTN Enterprise BU Maturity Rating (Top 6)

(2021-2022 % and YoY Growth %)



Vertical Propositions

The portfolio of products and services must be transformed to address higher value opportunities within Enterprises

1

Digitalisation & Experience

Digitalise the **CUSTOMER EXPERIENCE**, with and obsession and our **CUSTOMER** in mind

2

Digital Talent

Upskill and recruit to create the **BEST IN INDUSTRY ICT** and **DIGITAL TALENT**

3

Partners & Acquisitions

An acquisition strategy across markets will deliver **significant value** by accelerating capability and competence in services and systems integration skills

4

*MTN Multi-Dimensional Capability Index – Internal MTN Best in Class Framework



Multinational vertical propositions



Focus will be placed on creating value propositions for each vertical with the ability to scale

We have engaged our MNC teams and some of our closest partners in order to build 8 case-studies and 4 industry specific yellow-books during 2022, with plans to expand them further in 2023

Verticalisation and Turn-key Client developed case-studies, ready to be “smartly scaled”





Ambition 2025- 5G Private Networks



The CoE has accelerated the implementation of industry specific 5G cases across our geographic footprint and beyond

Mining

5G oriented mine

- Drones for Inspection & Security
- Collision Avoidance
- Video Surveillance with AI
- Vehicle monitoring



Manufacturing

Real Time Automation

- Remote Control Robots
- Predictive Maintenance
- AI driven quality inspection
- Employee fatigue monitoring



Other

5G in logistics, health, education

- Smart Campus
- AR/VR
- Drones for scanning
- Drones for perimeter security

5G

Global mining players

- Video Surveillance
- Drone Surveillance
- Vehicle monitoring
- Collision Avoidance
- Video Surveillance
- Vehicle monitoring
- Attendance and Workflow

Global automotive player

Manufacturer player

- Data flow – video streaming
- Connectivity – scanners
- Stability – vision system
- Odin Workstation

Education player

- Smart Campus

Global logistics player

- Building Management
- Scanners
- Geofencing



Digitalisation & Experience



Deploy the most advanced technology to ensure a "zero friction" experience for our customers

MTN business is working towards ensuring a seamless, value ridden customer journey, supported both by in-house technology and strong partnerships

- Marketplaces
- Inside Sales
- SME GO Digital

**CHANNEL
DIGITALISATION** **2**



- Digitise high volume Journeys
- Opportunity to Cash

**DIGITAL
JOURNEYS** **3**

3

- OSS/BSS Transformation
- Automated processes and workflows
- AI and Predictive Models
- Real time Reporting
- Voice of Customer

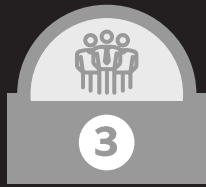
1
**INTELLIGENT
ENTERPRISE**



**VALUE
AUTOMATION** **4**



- RPA
- Chatbox
- Data Analytics
- CVM & Predictive Models
- AI & ML



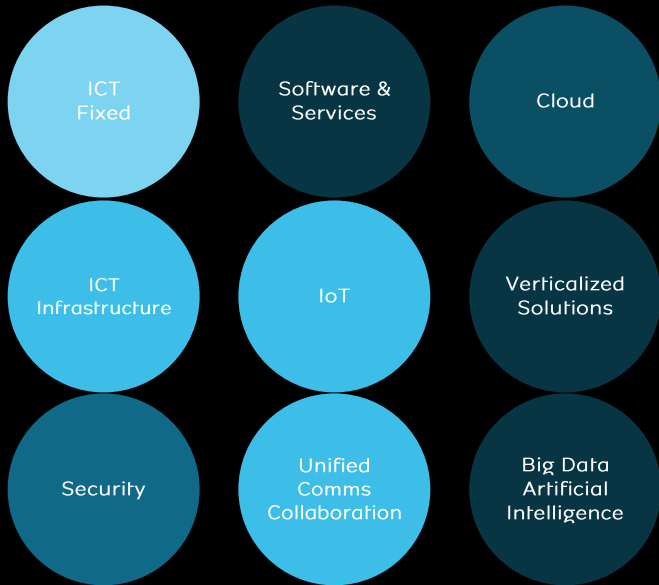
Digital talent

While becoming reference of the continent for digital and ICT talent



MTN recognises the human factor as the engine behind all technological advances and ensures constantly that it grows, attracts and recognizes the best talent across the African continent

Our Growth Platforms



ICT Certifications

 **Microsoft**
100 certified professionals

 **HUAWEI**
25 certified professionals

 **CISCO**
212 certified professionals

Partners

Consultancy Services for Industry Expertise.

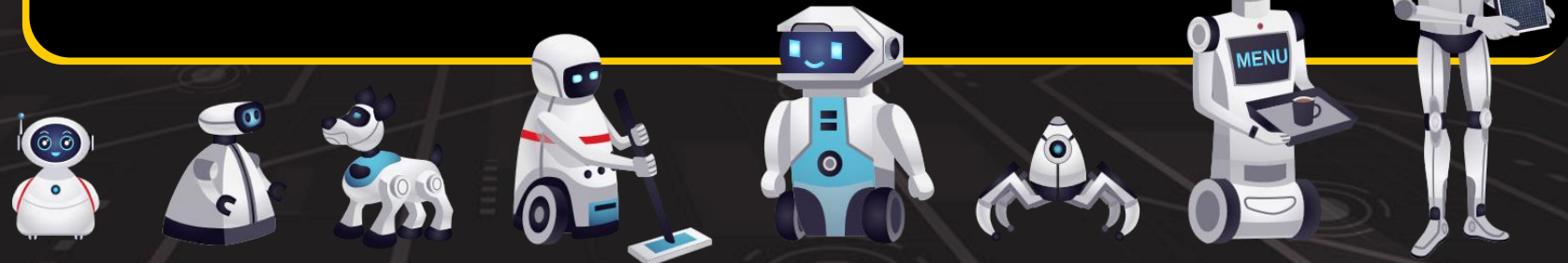
Professional Services for Skills Augmentation

Alliances

Managed Services for quick GTM

5G

Assets





Partners & Acquisitions

Complementing our capabilities through partnerships, alliances and inorganic growth



MTN business is working towards ensuring a seamless, value ridden customer journey, supported both by in-house technology and strong partnerships

Partner Ecosystem

Partnerships to complement competencies and support vertical value propositions

100+ PARTNERS

Across ICT categories



Strategic Alliances

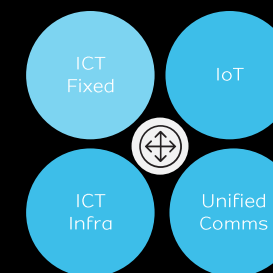
MTN Group and Microsoft signed in 2022 a strategic alliance to accelerate digital and cloud transformation in Africa.



Selective Mergers & Acquisitions

Selective M&A where there are opportunities to accelerate growth and build capability

Complimentary M&A:



For Rapid Revenue Growth / Topline

Boutique M&A:



For Capability & Client Access

Our TOP Goals

MTN Business is accelerating its growth across the continent while ensuring that the customer stays at the centre of our efforts



BELIEVE

- **>R30bn revenue & increasing SME share**
- **Lead the way in solutions, through connectivity**
- **Delight our customers (#1 NPS)**
- **Customized solutions driven by our customers**
- **Be the pan-African employer of choice**
- **Leading mobile and Top 5 ICT player in Africa**



Key takeaways



MTN Business is ahead of its 2025 ambition of being the digital enabler and ICT in the African continent

- 1 MTN Business has successfully repositioned itself as Africa's digital enabler
- 2 The past 2 years have shown a 4x increase of both the traditional services and the ICT potential to 2025, with MTN being in a very strong position to maximize its addressable impact
- 3 Ahead of the more than R30bn revenue ambition for 2025, MTN Business accelerated its growth from 14% YoY in 2020 to 30% in 2022, breaking the R20bn mark and "ahead of schedule" for hitting our Ambition
- 4 While Connectivity will continue to drive our core revenue, non-mobility has surpassed 20% of revenue share and expected to accelerate faster to 2025, supported also by increase demand from the SME space
- 5 The MNCs have outgrown all other segments and proven that a custom approach to solutions drives our value
- 6 The ICT Centre of Excellence has been scaled to the Top 6 Markets supporting our growth into ICT and Digital Services with ICT growing in double digits across our top 6 markets (Cloud and IoT growing above 35% YoY)
- 7 While Opcos are reaching the required maturity, MTN Business will move to the next phase of growth based on 4 key pillars:
 - Creation of verticalized value propositions with the ability to scale
 - Digitalization acceleration to ensure a "Zero Friction" experience for our customers
 - Becoming reference of the continent for digital and ICT talent
 - And complementing our capabilities through partnerships, alliances and inorganic growth

Managing the Enterprise



Meet the teams that accelerate Enterprise and CoE towards our Ambition 2025



Tumi Chamayou

Executive Group Enterprise Business Unit



Dr Rajan Padayachee

GM Enterprise Transformation and Innovation



Magatho Mello

GM Multi-National Companies



Emmanuel Forson

GM Value Propositions and Segments



Lynda Saint-Nwafor

Chief Enterprise Business Officer MTN Nigeria



Wanda Matandela

Chief Commercial Officer MTN South Africa



Amadou Omarou Sidikou

Head of in-country CoE Solutions Sales



Vaughn Naidoo

Acting Executive Centre of Excellence



Sudipto Moitra

GM ICT Business Solutions



Dr Nkosi Kumalo

GM Product and Capability



Thank you

