

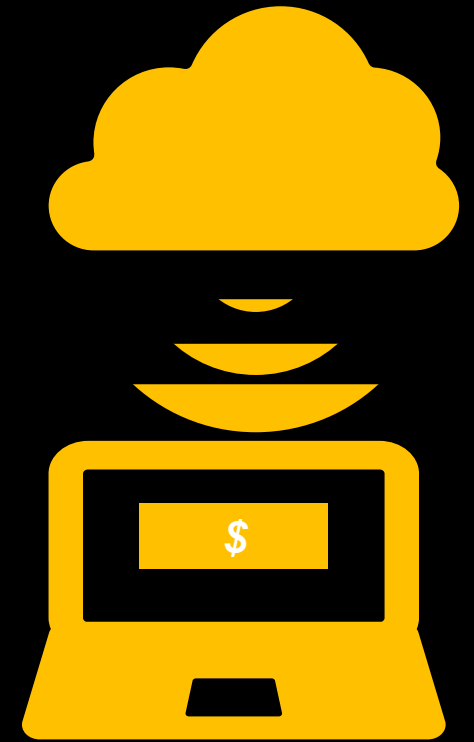


MTN

Digital Transformation for a Digital Economy

Dr Nkosi Kumalo

Digital Economy



Digital Economy Framework

Basic Infrastructure

- Roads, Ports, Airports
- Water, Electricity

Digital Infrastructure

- GSM Network, Fibre Optics
- Internet Coverage
- Data Storage and Capacity
- Digital Public Service delivery

Enabling Environment

- Regulatory
- Policy
- Investment
- Public Acceptance
- Financial Instruments

Enabling Technologies

Short Term

- Cyber Security
- Cloud Computing
- Big Data / AI

Medium Term

- Block Chain
- IOT
- 3D Printing

Long Term

- Robotics
- Energy Storage
- Biotechnology

Human Capital Dev

Upstream

- Teachers, Vocational Training

Knowledge Creation

- Masters, PhD, Researchers, Entrepreneurs

Knowledge

Commercialisation

- Engineers, Skilled Professionals,

Start with the Why

Agenda

Challenge

Opportunity

Inclusive Growth

0,3%

Is SA GDP growth
forecast for 2023

Job Creation

34%

Is SA employment
forecast for 2023

**Economic
Transformation**

23%

Of SA household income is
from government grants

R55B

Is the value on online
retail sales in 2022 (5%
contribution to retail)

27,5M

people in SA are Gen Z (aged
between 7 and 25 years of old)

97%

Of Sans have atleast1 mobile phone

MTN

Source: PWC (Aug 2023) SA economic outlook

Digital Transformation Drivers in a Telco

1

Impact of Covid19 in Accelerating Digital Adoption

2

Business focus on core business and outsource the rest

3

Digital Transformation to enhance enterprise productivity

4

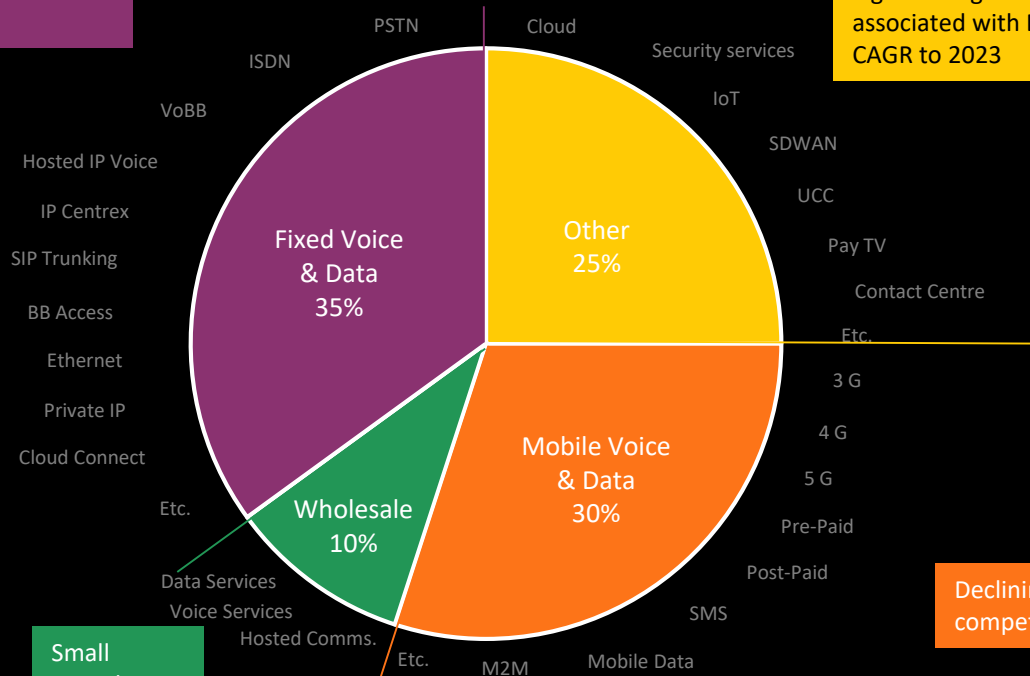
Affordability of Ultra Broadband connectivity

5

Shifting spend from CAPEX to Opex Service models

The Telco Business Model is changing

Small growth driven by data



Significant growth in markets associated with DX – 10% CAGR to 2023

Declining due to competition

Small growth

The New Rules of Engagement

- Being the DX Partner of Choice
- Opportunistic & Varied Partnerships
- Strong Professional Services / IT Capabilities
- Anchor Clients
- Consultative Selling
- Demonstrating ROI
- Customer Journey and Insights

Thank you



Ambition 2025

Leading digital solutions for Africa's progress