IFC International Finance Corporation World Bank Group

GSMA Green Power for Mobile

In partnership with Netherlands

Deployment cases and learnings from other markets

Green Power for Mobile Working Group - Nigeria and Ghana specific

Lagos, 29-30 Jan 2014

Deployments

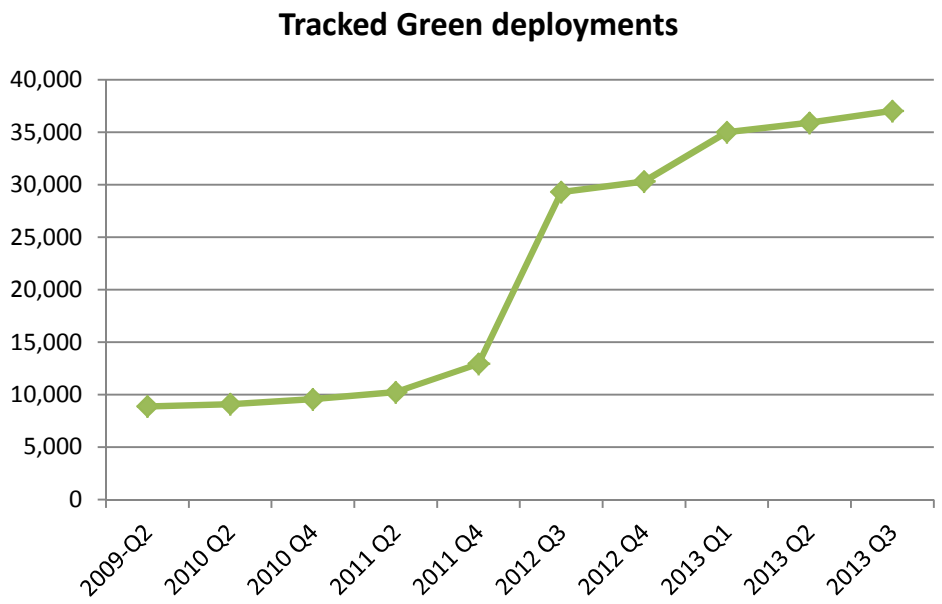
Drivers

Cases

Learnings and Shortcomings

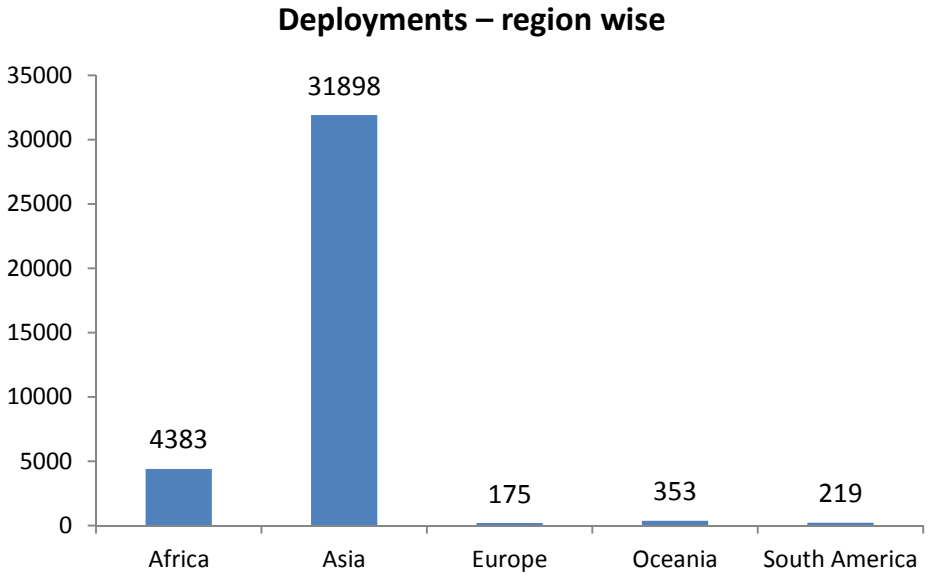
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Deployments



- Green deployments have grown by over 260% from 10,233 green sites in 2011 to over 37,000 sites in 2013

- Asian region leads with a total of nearly 32,000 sites, followed by African region with over 4,000 sites deployed with green power



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Drivers

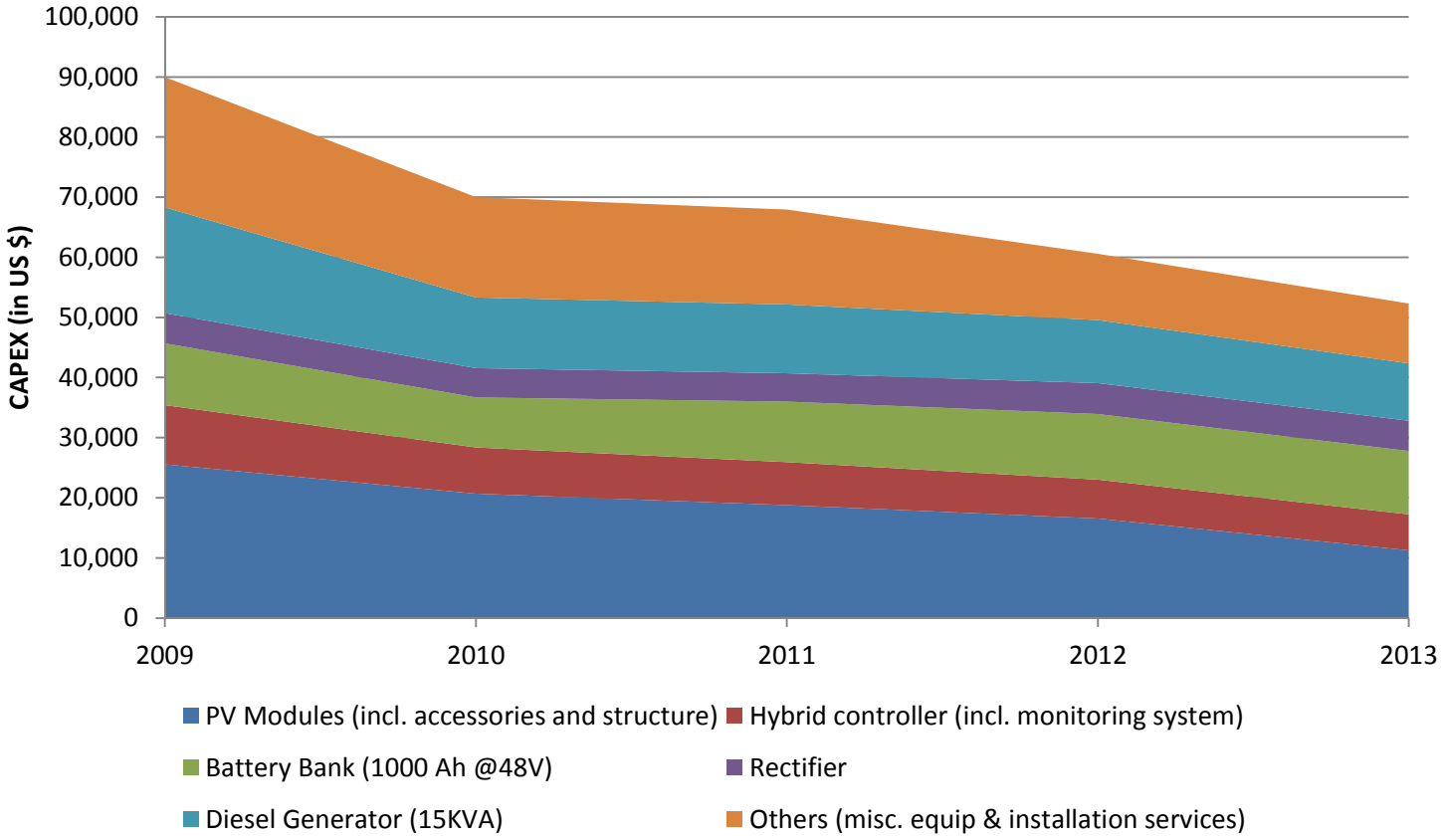
- Cost competitiveness
  - Declining revenues due to price wars and subscriber churn
  - Focus on cost and operational efficiencies
- Strategic focus and outlook
  - Long term view on OPEX
  - Business sustainability
  - CSR and branding
- Regulatory intervention and policy mandates
- Technology development and eco-system growth
- Pricing trends and benefits



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Drivers: Pricing

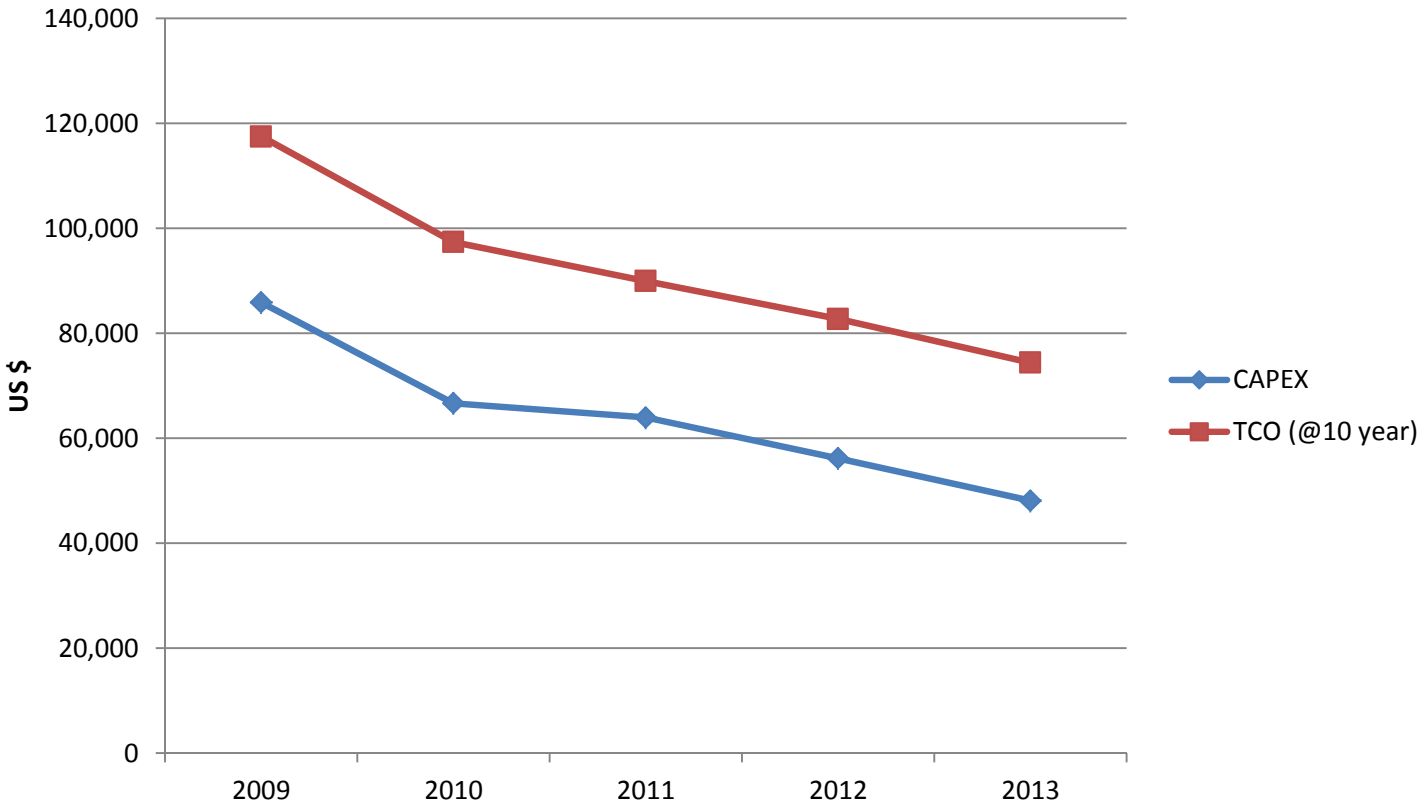
Cost trend in Solar PV power system and components for powering telecom sites, 2009-2013



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Drivers: CAPEX and TCO

Green Power System - CAPEX and TCO trends, 2009-2013



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Market	Key Driver(s)	Adaptors and beneficieries
India	Commercial Regulatory Environment and sustainability Economy	All major TowerCos – 4000+ sites
Indonesia	Commercial Regulatory, Environment and sustainability Geography and Infrastructure	Major Telcos – 4500+ sites
China	Eco-system Manufacturing capacities Government mandates Prices	MNOs – 20,000+ sites
East Africa	Input Costs Infrastructure and Operations CSR	Safaricom, Airtel, MTN, Utel – 200+ Sites
West/Francophone Africa	Business strategy Operating environment Infrastructure and costs	Major Telcos and TowerCos – 900+ sites
Nepal, Malawi, Zambia etc.	Feasibility of commercial and technical case Strategic drive and commitment	Ncell, Airtel, TNM – 200+sites

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What are the learnings from various deployments across regions?

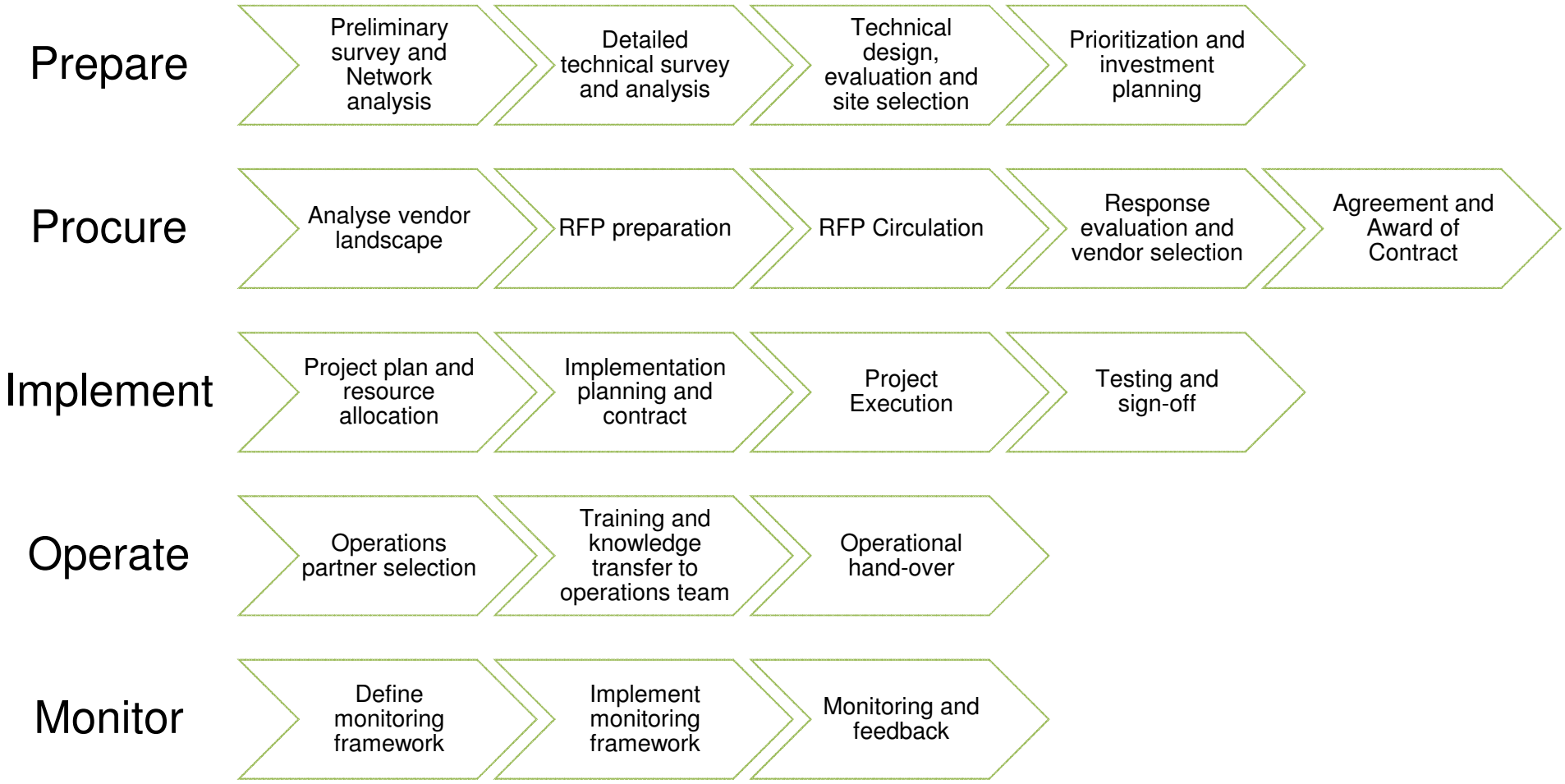
What are the short comings and challenges?

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Operational Goal	Affecting Factors	Business Impact	Enabling Factors
Network Availability	▪ Failure in equipment performance ▪ Failure in energy provision	▪ Quality of Service due to disruption ▪ Revenue loss ▪ Negative impact on the brand	▪ Tight SLAs for performance ▪ Robust systems and processes to enable performance ▪ Proactive monitoring and control of performance failures
OPEX Efficiency	▪ Input costs ▪ Operational leakages ▪ Operational inefficiencies	▪ Profitability and Bottom line ▪ Cost of services ▪ Total cost of ownership	▪ Right technology and solutions ▪ Robust systems and processes ▪ Right supply chain integration ▪ Regular monitoring and reporting



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Thank You!

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