



Accelerating 5G Deployment in South Africa

CSIR International Convention Centre, Pretoria, South Africa



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March 13, 2024

WHO WE ARE

SBA Communications Corporation (SBA) is a leading independent owner and operator of wireless communications infrastructure, including towers, buildings, rooftops, distributed antenna systems (DAS) and small cells. Founded in 1989 and headquartered in Boca Raton, Florida, SBA has operations and offices throughout the Americas, Africa and in Asia. We are listed on NASDAQ under the symbol SBAC and our organization is part of the S&P 500. SBA is also one of the top Real Estate Investment Trusts (REITs) based on market capitalization.





- **35 years: 1989 – 2024**
- **Industry founder and leader**
- **HQ in the United States (Boca Raton, FL)**
- **40,000 sites in operation**
- **22,000 sites in 14 international markets**
- **43 offices with 1,800 employees**
- **Listed company on Nasdaq**

- I am an American who has the privilege to live in this extraordinarily beautiful country.
- This is my second opportunity to do so. The first was in 1993 / 94.
- My comments are based on the observations of an outsider who may not have all the facts.
- I hope you receive them for what they are: my observations.



- When South Africa went into lockdown in 2020, connectivity was adequate in affluent communities. This was simply not the case for those less fortunate.
- The need and desire to access data in real time is only increasing.
- 5G requires more infrastructure, not less.
- Shared (tower) infrastructure leads to faster deployments, is a more efficient use of capital and allows for diversification of access.
- Accelerating 5G in South Africa requires a conducive regulatory environment.
- Collaboration is vital and will lead us to better results.

Overview of SBA South Africa



- Entered via a JV in 2015
- Main office located in Paarl, Western Cape
- 4th largest Towerco in the country
- Current portfolio of 1,800 macro sites
- Towers located nationwide
- Work with all mobile network operators on an equal access basis
- Recently launched Power-as-a-Service
- Continually enhancing site security



Challenges to overcome in South Africa



1. **Load shedding** impacts network service and quality
2. **Theft and vandalism** of batteries, diesel, copper, and other components degrades network performance and drives up costs
3. **Unpredictable regulatory framework** that leads to higher costs and delays in network expansion



New Tower Build trends 2018 - 2023



| Year | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|---------------------------------------|------|------|------|------|------|------|
| South Africa Towerco Industry | 688 | 507 | 329 | 350 | 292 | 225 |
| YoY % drop in new builds for industry | | -27% | -35% | +6% | -17% | -23% |



What can be done to address these challenges?



1. The challenge of **load shedding** can be mitigated (at a cost) by offering Power-as-a-Service
 - 4-hrs of battery backup and in some cases a diesel generator on site.
2. **Theft and Vandalism** requires improved site security and industry collaboration.
 - Improved site access protocols, cameras, lights, vibration sensors, rapid response and industry collaboration.
3. **Conducive regulatory framework** means one that is both responsible and predictable.
 - Clear zoning rules, shot clocks, and/or approval by administrative silence.



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Thank you