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THE CEOs LEADING CHANGE IN NIGERIA'S GROWING TELECOMMUNICATIONS SECTOR

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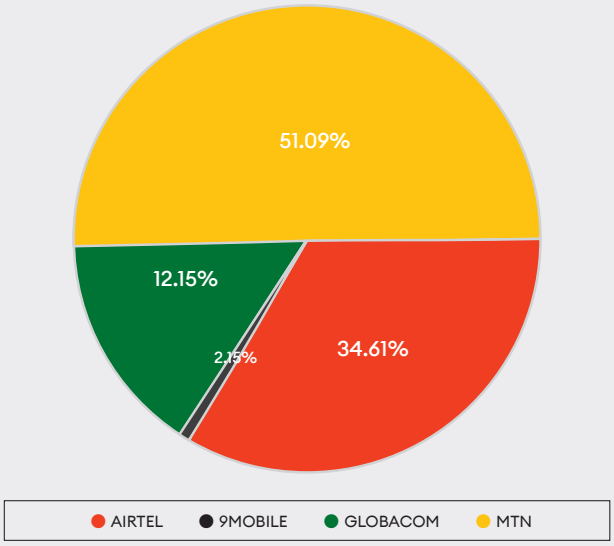
OCTOBER 2024**



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Nigeria's Telecom Sector Thriving On A Global Scale

TELECOMMUNICATIONS HAS BECOME THE CATALYST THAT OPENED UP THE COUNTRY'S ECONOMY TO DIVERSE PEOPLE, INDUSTRIES, AND PROFESSIONALS, CONTRIBUTING AROUND 14.5% TO GROSS DOMESTIC PRODUCT (GDP) IN THE FIRST QUARTER OF 2024.

BY RARZACK OLAEGBE

Nigeria's telecom sector is growing. It is enabling the country to compete technologically on a global scale. Mobile devices are accessible. Nigeria has recorded a steady increase in mobile phone users since 2001 when the Global System of Mobile (GSM) technology debuted. Figures from the country's industry regulator, the Nigerian Communications Commission (NCC), showed Nigeria moved from 2.2 million telephony subscriptions in 2002 to 184 million in 2019 and 224 million in 2023.

The teledensity as at March 2024 is 101% and the number of internet subscribers is reportedly more than 163 million. Internet subscriptions climbed to 134 million in October 2024; this translates to 42% broadband penetration in Nigeria.

Infrastructure investments

Challenges in forex have limited the telco operators' ability to invest more in infrastructure with the naira devaluation reducing their Capex plan. This has not deterred them though. For instance, MTN Nigeria plans to invest about N600 billion ($388 million) in national infrastructure networks in three years and is already building West Africa's largest data center, a Tier IV data center to help it meet the growing data demands and digital needs of businesses and consumers.

Airtel, on the other hand, reportedly plans to invest $700 million annually over the next four years to roll out its 5G network, install fiber optic cables, and build a data center. It's also been said that Sunil Bharti Mittal, chairman of Airtel, the parent company of Airtel Africa told Nigeria President Bola Tinubu at a meeting recently that the company's objective is to bridge the digital divide and foster opportunities for innovation and economic growth through reliable and scalable infrastructure.

Globacom has invested in a submarine cable. The high-capacity Glo 1 optic fibre cable connects West Africa to the U.K., and the rest of the world. It boosts economic activities in the region, creates opportunities, and serves companies in Europe and Africa.

Emerging Markets Telecommunications Service Limited (EMTS), operator of 9mobile completed an equity investment by LH Telecommunication in a 95.5% takeover of the company. Also, Ntel plans to invest $550m to restructure, rebuild, and develop its brand.

Improve broadband

The NCC has reportedly licensed a number of National Long Distance, Internet Service Providers, and Sales and Installation firms. The initiative may be part of a larger strategy to connect the 774 local governments and improve broadband penetration to reach 70% in 2025. Nigeria has approximately 35,000 kilometers of fiber optic cables and plans to add 90,000 kilometers to improve connectivity and promote digital inclusion.

The sector has maintained its positive trajectory, owing to the innovative regulatory environment promoted by the NCC. The industry also generated $820.8 million from 5G spectrum licenses. Three licensees emerged in MTN, MAFAB, and Airtel.

Industry figures showed that the telecommunications and Information Services sector recorded a 4.3% increase in its performance between the last quarter of 2022 and the first quarter of 2023; an approximate growth of 9.19%. On a year-on-year basis, there is a progression.

Elon Musk's SpaceX, 5G

Starlink, a satellite-based wireless facility has landed in Nigeria, with the potential for nationwide coverage. Meanwhile, MTN and Airtel have launched the commercial 5G service to transform the way Nigerians consume data services and enhance telecommunication. There are also countless Internet Service Providers (ISPs) offering independent broadband services.

Invaluable VAS Boosts Revenue and Customer Value

Research has shown that the industry is undergoing a transformative change with the integration of value-added services (VAS), enhancing customer experience, and driving revenue growth. As the market evolves, operators are leveraging VAS to provide personalized services, foster customer loyalty, and thrive.

The Numbers From The NCC (October 2024)

Telecom subscriptions	- 157+ million
Internet subscribers	- 134+ million
Broadband subscriptions	- 91+ million
GDP contribution	- 16.36% (Q2 2024)
Teledensity	- 72.7%
Major operators	- 4

Market share

MTN	- 51.09% (80+ million)
Airtel	- 34.61% (54+ million)
Globacom	- 12.15% (19+ million)
9mobile	- 2.15% (3+ million)

The Power Of Mobile Connectivity

BY INVESTING IN ITS FRONTLINE EMPLOYEES, AND BUILDING AND OPERATING COMMUNICATIONS INFRASTRUCTURE, IHS TOWERS HAS EMERGED AS A MARKET LEADER IN SEVERAL COUNTRIES.

Mohamad Darwish, CEO, IHS Nigeria

IHS Nigeria is part of the IHS Holding Limited (IHS Towers) group, one of the largest independent owners, operators, and developers of shared communications infrastructure in the world, by tower count. It is a founder-led company with a diverse operational skillset, a series of organic and inorganic growth accomplishments, and a history of delivering high-quality service.

With almost 3,000 employees and over 39,000 towers across nine countries, IHS Towers leverages over two decades of experience to provide strong network uptime in Nigeria, Brazil, Cameroon, Colombia, Côte d'Ivoire, Egypt, Kuwait, Rwanda, South Africa and Zambia.

IHS Nigeria CEO, Mohamad Darwish, explains how the company is helping to accelerate the digitalization of economies through the acquisition, management, and construction of critical national communications infrastructure.

"We are a digital infrastructure company, but our scope doesn't end there; particularly if you look at the approximate 16,000 sites we manage in Nigeria alone, which collectively sit on over three million sqm," he says.

"If you consider the thousands of trucks, vehicles, and cars that go out every month to deliver diesel and replace equipment, we are a logistics company. If you take the sites we build and the concrete we mix, we are a civil engineering company."

Darwish adds that IHS Nigeria works with suppliers who understand the company, its culture, and expectations.

In Nigeria, the company has delivered connectivity to over 700 rural communities and laid more than 15,000km of open-access fiber. Given that Nigeria has an estimated 35,000km of open fiber access, IHS Nigeria is responsible for a considerable portion.

Through its Frontline Workers Initiative (FWI), which started in 2021, the company continues to support its frontline workers including drivers, technicians, contractors, and security personnel by providing their children with the opportunity to apply for funded university scholarships.

In doing so, IHS Towers is helping improve the quality of life of these employees and their children, facilitating access to global education as these young people attend leading international universities and pursue higher education degrees.

In Nigeria, the FWI faced some initial skepticism, particularly in terms of whether eligible children would be accepted into international schools, given their public school backgrounds. The initiative, however, seemingly disproved its sceptics. "Nigerians can achieve so much if we have an enabling system. What we have done for these children, is to help open their minds through new education opportunities," Darwish says.

Nigeria is the country's largest market, and it continues to grow in the country whilst reducing its carbon footprint.

As a group, IHS Towers has set a target to reduce its Scope 1 and Scope 2 kilowatt-hour emissions intensity by approximately 50% by 2030, through its Carbon Reduction Roadmap.

Under Project Green, its current phase, the company has committed $214 million of Capex between 2022 and 2024. The goal is to reduce reliance on diesel by integrating solar panels and battery storage solutions at off-grid site locations. Around 9,793 sites in Africa have been upgraded and the company's total investment in the project from commencement until June 30, 2024 is $205.7 million.

By 2025, on completion of Project Green, IHS Towers expects just 9% of its sites in Africa (excluding Egypt and South Africa) to rely solely on generators, while the remaining 91% will run on a combination of other power sources, including grid, hybrid and/or solar solutions.

In many of its markets, IHS Towers has continued to witness 4G technology penetration ahead of the onset of 5G. The combination of low existing penetration, high subscriber growth and demand for data services, supports investment opportunities along the mobile supply chain.

As Artificial Intelligence takes the world by storm, IHS is also riding the wave by ensuring its use to derive efficiencies and drive innovation through mining and studying the vast amount of data that IHS collects from its various sites across all geographies.

The telecom market in Nigeria is contributing approximately 16% to the GDP. IHS Nigeria is a leading contributor to this. By providing the network backbone that powers mobile connectivity, the company helps enable activities across sectors, from financial services to healthcare, the digital economy and government services.

Raising The Game For Telecom Providers In Nigeria Via ISO 27001 Certification

AS THE FIRST EC-COUNCIL LICENSED PENETRATION TESTER (LPT) IN AFRICA, DIGITAL ENCODE AND ITS CEO HAVE WORKED TO STANDARDIZE THE TELECOM SECTOR.

Some may say that Nigeria's greatest revolution was the democratization of the telecom license, which ushered in many players. The value-added services (VAS) providers are the winds behind the telecoms' sail. Digital Encode is one of them.

The company has contributed to the sector in a deep-rooted manner to ensure it's achieved standardization. If the systems of connected organizations were not standardized with the players jostling for connectivity, chaos would reign.

Adewale Obadare, founder of Digital Encode, explains that there was a need to protect the sector's connectivity; only connectivity brings availability. Beyond the availability, there is information security.

"Connectivity must be available to the right people. That is why we have positioned our company to ensure there is CIA, by making sure there is confidentiality, integrity, and availability. That is what we have been doing in the telecom sector," he says.

Obadare shares the downside of unsecured connectivity in a bank. Say, for instance, the bank's management ignored the process and it simply advised its telecom providers its link was not required anymore. The engineers then documented the request. However, some unscrupulous elements discover the active link and connect it and steal funds.

"That means it is not about connectivity. Connectivity carries a risk without appropriate standardization," Obadare says. "Then, the Central Bank of Nigeria mandated the financial sector to execute IT standards. We led that change in the telecom and banking sectors and have worked with the telecoms to standardize their environment. We have consulted for telecom to implement ISO 27001 – an international standard for best practices."

ISO 27001 spells out what people need to do, specifying the requirements for establishing, implementing, monitoring, and improving the Information Security Management System of an organization.

"That is what we have done in driving the transformational change in the telecom sector and we have added value to the sector," he adds.

Digital Encode is a professional services firm. It has been defending Nigeria's and Africa's cyberspace and its vision is to become the first information security technology assurance in Africa.

"Our mission is to help every individual and organization in Africa to achieve their potential by protecting their information assets and in 21 years we have done this and continue to do."

With over 60 professional certifications in governance, risk, and compliance, Obadare, was appointed the first

Adewale Obadare, Founder of Digital Encode

Professor of Practice (Cybersecurity) in Nigeria. The position goes to distinguished individuals of recognized professional standing, with significant records of accomplishment of exceptional professional experience in their field.

Arguably the most credentialed cybersecurity professional in Africa, he has led transformative change in the telecom sector and this has been through the most critical asset: knowledge acquisition.

"By acquiring the appropriate knowledge that is the only way you can play in our space. When we started in the early days of cybersecurity, cybersecurity was anonymous with foreign companies who consulted for Nigerian companies. I was the first EC Council Licensed Penetration Tester in Africa in 2007. I led the change for penetration testing, and cybersecurity in Africa. I highlighted that you do not have to be White to be right. Then, while I was leading that change, do not forget, that nothing great is done in isolation. I needed a productive and efficient team to drive this change.

"There is a ripple effect in employing a person, especially in Nigeria where there is no social scheme. We work with many partners. Directly, we have [reached] over 100 people; indirectly, over 500 people. We are alleviating poverty. We are building human capacity that can stand firm."

Analyzing The Data Center Sub-Sector's Growth Trajectory In Nigeria

WITH OVER $150 MILLION IN FOREIGN DIRECT INVESTMENT IN THE DATA CENTER BUSINESS, DIGITAL REALTY AIMS TO OPEN UP THE COUNTRY TO THE WORLD.

In 2021, Digital Realty, a data center real estate investment trust, in a joint venture with Pembani Remgro Infrastructure Fund acquired Medallion Data Centre – a carrier-neutral data center operator in Nigeria – and it has spent over $150 million in the business since it entered the Nigerian data center space.

Ikechukwu Nnamani, the founder of Medallion, says the investment was required to scale its operation. That led to the strategic alliance with Digital Realty Group. As one of the biggest data centers globally, Digital Realty's DNA runs through the operations of the new entity, ensuring the management of Medallion Data Centre and employees assimilate Digital Realty's way of delivering effective service. Digital Realty Nigeria has the DNA of its origin.

"It is a testament to teamwork. This means any customer that has interfaced with Digital Realty in Europe or Asia would get the same experience in Nigeria, irrespective of the peculiarity or challenges confronting our country. We have placed the standard at the highest level. The investors have committed millions of dollars to the new infrastructure," Nnamani explains.

Medallion employed its carrier-neutral data center services in Nigeria from its Victoria Island and Abuja offices and today its facility "is the best not only in Nigeria but also in the West Africa sub-region".

Nnamani mentions that no other facility existed then when Medallion erected the "not a purpose-built data center". The company transformed a commercial building into a global structure that has attracted international and local customers.

"The infrastructure we have is of the highest standard. A few other data centers have something close. I am talking from the marketplace. The number of service providers utilizing our facility, volume of traffic, the level of connectivity we have, the ability of the people to interface with others seamlessly, cost-effectively and efficiently – we are above our peers."

Nigeria is planning to digitize its economy by 2030 with the National Digital Economy Policy and Strategy (NDEPS 2020-2030). Data centers are at the core of this plan. It shows that government services will be accessible online. Outside of the government, businesses require a server to store data, which is accessible 24/7.

The telecommunications sector, fintech, and start-up ecosystem need top-notch data centers for survival. Before Digital Realty and other data centers arrived, local businesses hosted data abroad. The data center sub-sector contributes to the Gross Domestic Product (GDP) of Nigeria and has continued with the current level of infrastructure investments and services.

Ikechukwu Nnamani, CEO, Digital Realty Nigeria

Nnamani explains that the company has created a platform others can build upon; that is its contribution to the industry.

"Currently, no other data center is operating at the scale we have achieved. If you look at the service provider in the data center business, the data center market is still in the infancy stage in Nigeria. If you look at it from a competitor's viewpoint, [it's] almost unnecessary because we are still growing.

"We still have a long way to go before you can lean back and say, 'yes, we have arrived'. Therefore, let us see who is ahead of the other. Despite the strategic position Digital Realty occupies, we do not see it as if we have arrived. We are at the beginning of the journey. In the next 10 years, the data center space will be exciting in Nigeria."

During a recently-experienced submarine cable cut in the sub-region, the company facilitated fast and efficient connectivity. This helped to minimize the expected downtime, with Nnamani adding, "we have brought much value to the industry and it is recognized".

In The Next Decade: Telecom To Soar Above The Oil And Gas Sector

FOR THE TELECOMS INDUSTRY TO THRIVE, THE FEDERAL GOVERNMENT HAS TO CREATE A HAVEN FOR LOCAL AND FOREIGN INVESTORS.

Telecommunications infrastructure is a national asset, which the federal government must protect by creating a haven for local and foreign investors, controlling the backbone, and guiding those who come into the telecom space so that the sector can thrive further.

Lekan Balogun, the CEO of Net Access Systems – a telecommunication service provider that delivers internet services and secured broadband communication services to large organizations, SMEs, and homes – explains that with the federal government's backing, the telecommunications arena could attract more funds.

While reiterating that the telecommunications sector has contributed to the growth of the country's GDP, he believes that in the next 10 years, the telecom sector would contribute more to the GDP than oil and gas.

Before starting Net Access Systems, Balogun, who is adept at driving sales, organization expansion and profitability in startups and multinationals, worked at several information technology firms, including TARA Systems, Resourcery Limited, Microsoft, SAP AG and Linkserve, among others. Over 28 years ago, he acquired solid business acumen and technical knowledge experience in sales, operations, technology and personnel at subsidiary, regional and corporate levels.

As the CEO of Net Access, he says, "We have helped telecommunications subscribers to put in more resources by providing connectivity for them. We have more businesses, our revenue is increasing, and we employ more people.

"Not only is our company contributing to the development of the ecosystem, we are contributing to our shareholders and customers as well and our firm has contributed to the GDP pool of the telecom sector."

In addition, he says the more funds that come into the telecommunications sector, the more developed the sector will be.

"In terms of investment in infrastructure, no Internet Service Provider (ISP) can operate without investing in infrastructure. Infrastructure is the backbone of an ISP. We need towers, cables, microwaves, equipment, and active devices etc. The infrastructure we have invested in has given us the edge to deliver excellent customer service."

The company offers Data Center as a Service (DCaaS) by providing offsite physical data center facilities and infrastructure through lease, storage and other computing resources. The DCaaS solutions include cloud and storage capability, business continuity, continuous monitoring, speed and reliability, data protection, on-demand self-service and scalability.

Lekan Balogun, CEO, Net Access Systems

Balogun says network monitoring is essential for businesses that rely heavily on IT and the internet for their daily operations and since many businesses deploy network monitoring as a means of reducing network infrastructure problems, improving network performance and increasing employee productivity is important.

"When it comes to ongoing daily operations, network monitoring is a critical part of maintaining the overall health of your internal network. It provides you with the power to monitor manage and analyze your network. Besides, we work with our customers to create a platform that enables their businesses to thrive. Because of our customers, our data center cannot go down for a second."

Having expanded into the West Africa sub-region, the company looks forward to consolidating this exploit through its workforce. Given the choice between profit and excellent customer service, Balogun chooses to deliver excellent services to the customers.

"Our goal is to enable businesses and operations to be profitable." He emphasizes that if a company places the needs of the customers ahead of profit-making, such a business will outlast the owners.

"Our customers are introducing other customers to us. We looked at the societal challenges and plug into these challenges. I told my colleagues that if you do not run a 24/7, seamless service, you have not done your job. The business of the customer must be reliable through the uninterruptible services we provide. We are passionate about the services we render to our customers."

Shaping The Future Of Telecoms

IPNX HAS DEMONSTRATED RESILIENCE AND A TRACK RECORD OF PIONEERING INNOVATION WITHIN THE NIGERIAN ICT SECTOR, ENABLING ITS CLIENTS TO EVOLVE RAPIDLY BY LEVERAGING CUTTING-EDGE TECHNOLOGY AND RELIABLE NETWORK INFRASTRUCTURE.

Information and Communications Technology (ICT) company, ipNX began its journey by focusing on connectivity services for corporate organizations. In the early 2000s, as banks and other financial institutions embraced network technologies to optimize their operations, ipNX was among the first to offer branch-to-branch connectivity. Its work in Wide Area Network (WAN) services laid the groundwork for a host of today's innovations.

The organization has also often raised the bar in service delivery. For instance, when the Central Bank of Nigeria (CBN) mandated a 99% reliability standard for banks, ipNX was the only provider capable of meeting the requirement. This demonstrated its commitment to maintaining the highest standards in network reliability and service quality.

Under the leadership of the Group Managing Director, Ejovi Aror, ipNX has transitioned from a fledging telecommunications start-up into a leading ICT company, serving a multitude of needs across the residential, small business, and enterprise markets.

Recently, Aror made the list of 50 Most Influential ICT Innovators in Nigeria for his leadership and innovation while ipNX was also celebrated for its broadband service termination and aggregation for achieving cost-effective scaling and enhanced control by VyOS - a global technology company and network operating system.

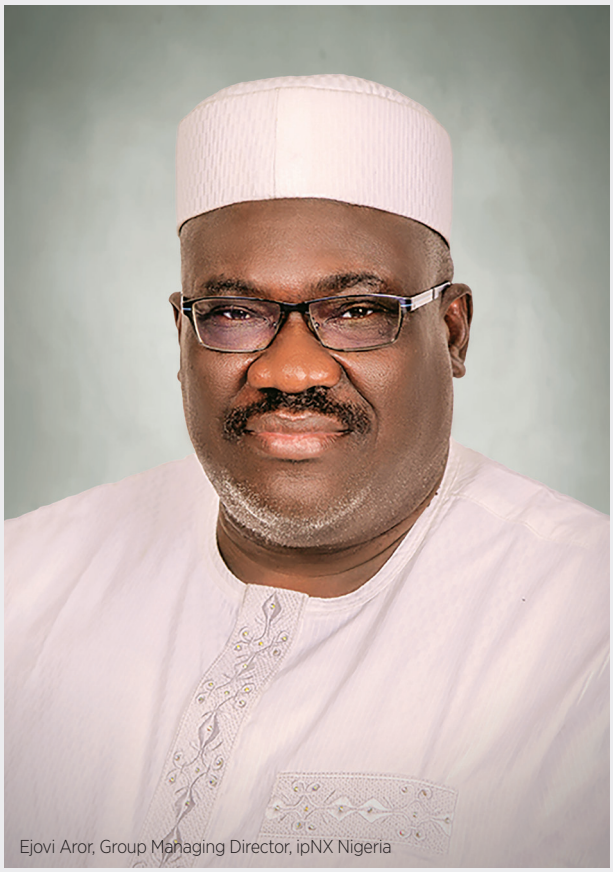
ipNX plays a significant role within the nation's broadband penetration agenda. It recognizes that achieving the Nigerian Broadband Plan (2020–2025) target of 70% internet diffusion requires contributions beyond mobile network operators.

"Our extensive fibre network is certainly pivotal in this effort, and we remain committed to shaping the future of the telecommunications sector and Nigeria's economic development," says Aror.

He is passionate about national development and is renowned for his mentoring and leadership skills with numerous high-performing protégées around the world. He also serves as the Managing Director of Techinvest and sits on the board of the Interswitch Group and Telnet Nigeria.

Aror is a versatile CEO who has been at the forefront of spotting local and international technology trends for over 30 years. He is a business leader with a capacity to develop cutting-edge, industry-defining blueprints while anticipating and driving business change.

Despite economic headwinds, ipNX has continued to grow and deliver financial performance to shareholders throughout its over 22 years of operations. The company is dedicated to making strategic investments that drive its future expansion as a business, and create a sustainable positive impact in the communities where it operates.



Ejovi Aror, Group Managing Director, ipNX Nigeria

A priority hallmark of ipNX's Corporate Social Responsibility (CSR) vision is collaborating with various tiers of government to improve the quality of education by providing free broadband internet within its footprint of fibre coverage.

The objective is to enhance the learning environment and empower the youth by facilitating their access to critical online resources, helping them thrive in the digital age and compete with their peers globally. This initiative has been executed in partnership with Lagos State and Oyo State governments with a total of 30 schools completed in the first phase.

"We are a proudly Nigerian company validating the concept of success for a Nigerian business by leveraging the exceptional talent of Nigerians. We are on track to becoming a dominant African ICT brand," Aror says.

Other ipNX innovation highlights include pioneering dual play (data and voice) for consumer broadband terminating on single fixed wireless customer premise equipment, fibre-to-the-home (FTTH) operations, and 1gbps speed broadband service in Nigeria and West Africa.

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ABOUT OUR COMPANY

Digital Encode, founded in 2003, is a leading multi-award consulting and integration organization that specializes in the design, management , and security of mission-critical business networks, telecommunications systems, and other Information Technology (IT) infrastructures.

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