



A young man and woman are sitting on a grassy hill, looking at a smartphone together. The man is pointing at the screen while the woman looks on with a smile. In the background, other people are scattered across the hill, and there are some trees and a red umbrella. A decorative blue floral graphic is overlaid on the right side of the image.

TELENOR MYANMAR SUSTAINABILITY BRIEFING

YANGON | MARCH 28TH, 2016

PETTER FURBERG | CEO

Our mission in Myanmar

Deliver mobile services for all

Develop employees and ecosystem

Do things right!



Top 5 countries by net adds (quarterly)

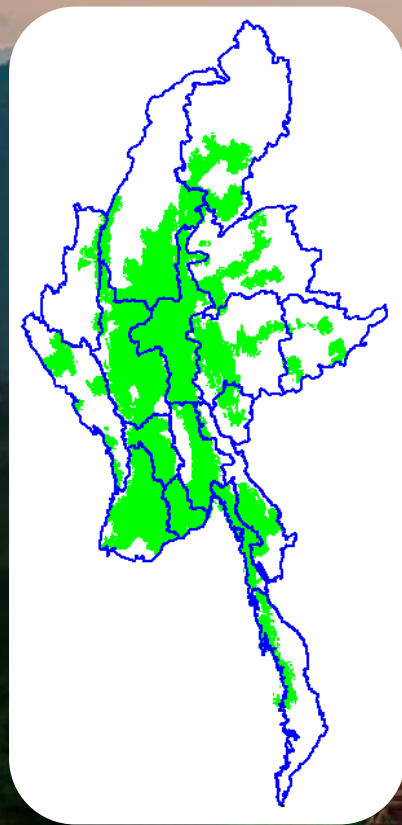
India	+26 million
China	+ 8 million
Myanmar	+ 5 million
Indonesia	+ 4 million
Japan	+ 4 million

* Ericsson Mobility Reports Q1-Q3 2015

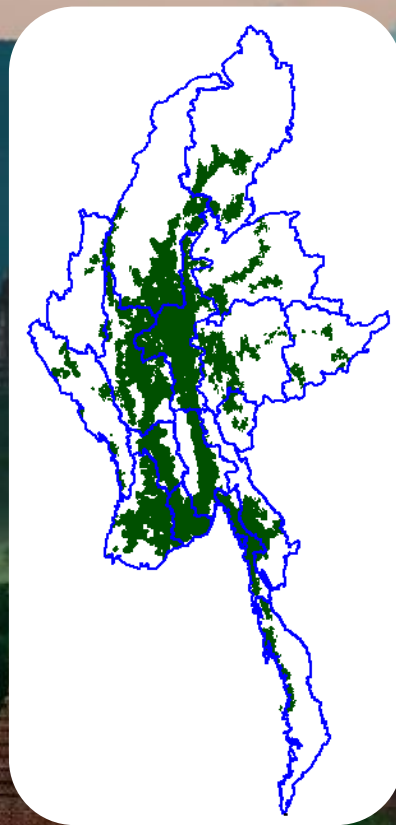
~5,000 sites today

- Covering 62% populated areas, and ~90% townships
- Strong service quality, with 100% 3G
- Serving >14 million customers
- 52% active data users
- Leader in affordable pricing for voice and data
- Customers served by 142 distributors and >66,000 shops
- >80% of suppliers are local companies

Unprecedented pace of rollout



**Voice network
coverage**



**Data network
coverage**

**Significant progress despite
challenges**

- Lack of infrastructure sharing
- Natural disaster
- Inaccessible territories
- Continued internal conflicts

Addressing sustainability risks

1

**Institutional
Landscape**

2

Corruption

3

**Legal
Framework**

4

**Supply Chain
Sustainability**

5

Land Issues

6

Ethnic States

1. Institutional Landscape



- **Good intent and improvements at the highest levels**
- **Challenges remain in operational levels**
- **Continue to face lack of coordination between ministries and agencies**

2. Corruption

- **Ethics and anti-corruption integrated into all functions and levels**
- **Extensive internal communications, education, and monitoring**
- **Continue to work with partners and supply chain; conduct integrity due diligence to minimise risk**
- **“No gift” policy**

3. Legal framework

No LIVE intercept

No network shutdowns

No censorship

Authority requests for personal data

2014*

7 requests
2 compliant

2015

37 requests
9 compliant

2016**

14 requests
0 compliant

Distribution of Authority Information

- 44 SMS - weather, voter registration, and health emergency



* From 17 Oct - 31 Dec 2014
** To date

4. Supply Chain Sustainability

9,444 workers within our supply chain trained to date
(2,481 at last briefing)

7,382 HSSE inspections nationwide to date
(2,728 at last briefing)

Standards

- Same across Telenor Group
- Supplier Conduct Principles
- Full Supplier cooperation

Key Challenges

- Local law – right to work from age 14
- Poverty
- Social acceptance

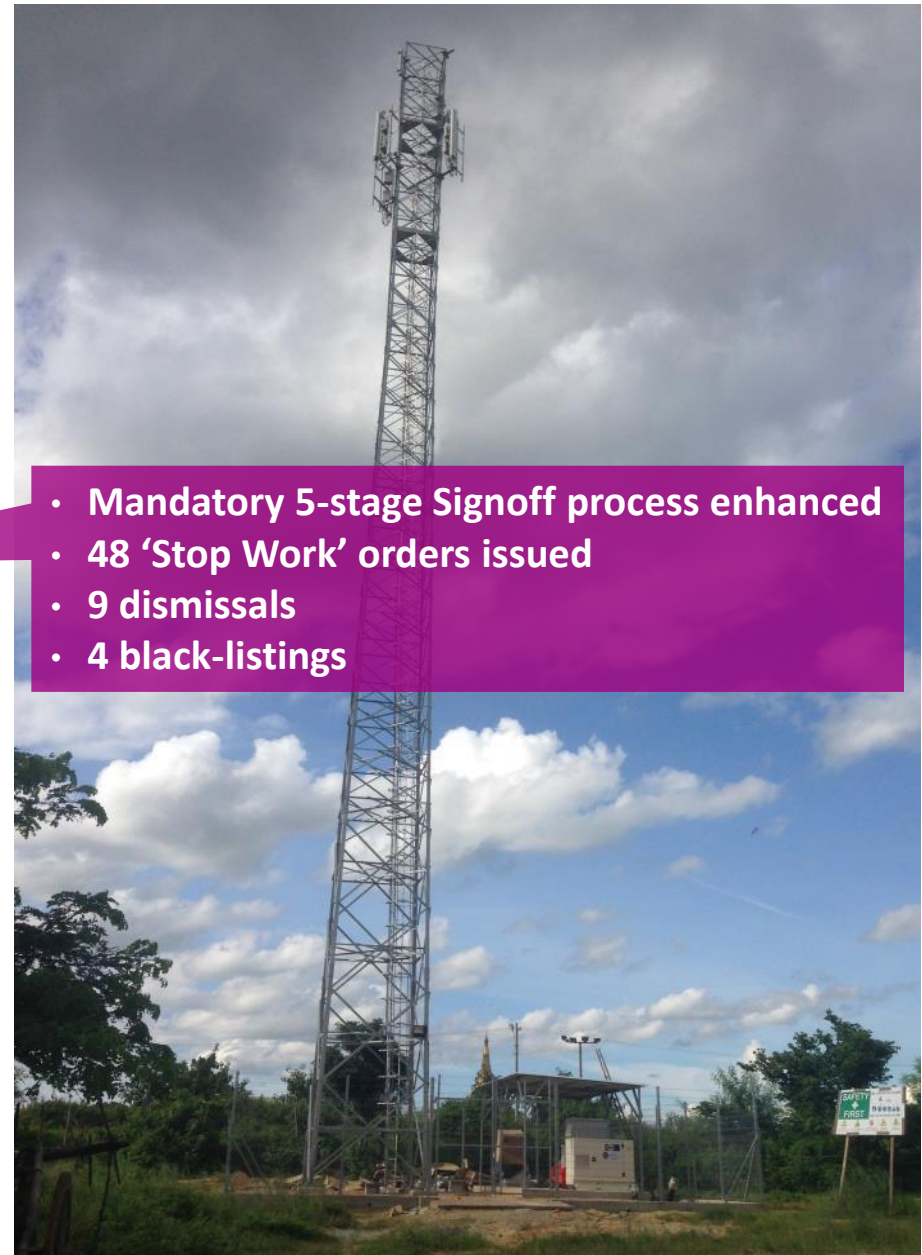
	FY'14	FY'15	Q1'16
Fatalities	1	2	0
Safety-gear related	32	79	16
Underage (15-17)	45	38	6
Child labour (<15)	5	13	1

4. Supply chain sustainability

Improvement areas

- Staff deployment for closer monitoring and follow up
- Improved internal processes
- Promoting and demanding accountability
- Anchoring at supplier CEO level
- More resources for site inspections
- Continued capacity building and certification requirements
- Collective industry attention

- Mandatory 5-stage Signoff process enhanced
- 48 'Stop Work' orders issued
- 9 dismissals
- 4 black-listings



5. Land Issues

Ensuring rightful land ownership & stakeholders engagement

- Stringent process by Telenor and tower companies
- Active dialogue with community
- Increased involvement of our State Liaison Officers (SLO) during site hunting

2,541 spot checks conducted
(818 at last briefing)

Key Community Concerns

- Noise from generator
- EMF concerns
- Jealousy



6. Ethnic States

Community Outreach

- Ensure access to accurate information
- Ensure concerns and complaints are taken on board and appropriately handled
- Ensure transparent processes
- Ensure that Telenor and our suppliers get daily security briefings

2,073 Stakeholder Meetings
(637 at last briefing)

52,183 community members met
(16,000 at last briefing)



Corporate Responsibility

Digital literacy & internet access

58

Telenor Lighthouses in 12 states

211

Digital literacy trainers*

1,800

Digital literacy students*



Non-formal education

55

Teashops Participating (Yangon & Mandalay)

954

Students enrolled

75%

Graduation rate



* As of end of February 2016

** 764 SCS teashop inspections to date

[VIDEO]
A glimpse at two of our partnerships

Corporate Responsibility

mHealth

18,000 downloads of **Mate** app to date

Disaster relief and recovery

76,000 people aided
MMK 528m + USD 106,500 raised

Special Number Auctions

MMK 547 mil raised

Mobile Financial Services

Commercial launch imminent





Thank you