



**etisalat by e& maintained momentum and demonstrated its strength during 2022, delivering strategic progress and outstanding results across the business. Recognised as the leading Emirati brand and the most valuable brand in the UAE, etisalat by e& focused on customer-centred innovation to continue to strengthen customer loyalty and create value for the Group.**



### About etisalat by e&

etisalat by e& continued to maintain its outright market and value share leadership in both mobile and fixed services, by providing comprehensive telecom solutions for Consumers and Businesses, relying on one of the best and most advanced telecom networks globally. Further, etisalat by e& continuously explores new possibilities to enhance the delivery of a portfolio of digital services across target segments.

For Businesses, etisalat by e& is a trusted partner and acts as an advisor by providing advanced next-generation ICT services on top of core connectivity, such as private networks, industry ICT solutions, managed services, and AI-enabled Smart Solutions.

For Consumers, our primary objective is to win customers' hearts and minds in the digital age, by expanding our portfolio of digital services and offering unique and superior customer experiences. In turn, this will allow us to enrich and cater for consumers' new lifestyles and emerging demands, such as gaming, lifestyle services, health and insurance.

etisalat by e& also provides leading Carrier and Wholesale services, providing voice, messaging, roaming, connectivity and satellite services along with inter-operator international and domestic services. Our Carrier & Wholesale services ensure the efficient flow of data traffic through our global backbone network of sub-sea and terrestrial cable systems.

#### A bold vision for the future

In line with e&'s vision, etisalat by e& will continue playing a pivotal role in creating more value for the Group, its shareholders and its customers. etisalat by e& will maximise revenue growth via diversification, deliver profitability by enhancing efficiency through AI, and support synergy maximisation across the Group.

Technology evolution, cloudification and changing customer behaviours have created a renaissance in connectivity thus providing new growth opportunities for the telecom sector. Telcos can leverage these opportunities by introducing innovative products and business models, harnessing technology transformation, enhancing customer experience and driving digitisation across their operating models.

etisalat by e& is strongly positioned to fully capitalise on upcoming growth opportunities with its solid customer base, strong leadership position across all sectors, technology superiority, wide-ranging product portfolio, digital incubating capabilities and talented team.

Building on its competitive advantages, etisalat by e& has defined its 2030 strategy with an aspirational vision, specific goals and clear strategic pathways, which will enable etisalat by e& to capitalise on all opportunities and continue to maintain its leadership position across all areas.

etisalat by e&

Continue leadership position in core and enhance digital customer experience and operational agility

## etisalat by e& 2030 Strategy: Grow-Scale-Excel-Transform

### 2030 Vision

To be the customer champion in a hyper-connected digital world

Utilise technology, analytics and innovation to foster ideas and deliver suitable and amazing experiences and services to all our customers

### 2030 Goals

Grow Core Revenue	Increase Digital Revenue Contribution	Create Additional Value for Carved out Entities
To be the Best CX Provider in UAE	Best Tech Employer of Choice in Middle East	Generate Higher Cumulative FCF

### Strategic Pathways

Grow Share of Wallet in Core & Beyond	Scale and Monetise New Growth Engines
Excel in World-Class CX Delivery	Transform into an AI and Data Driven Organisation



(continued)

etisalat by e&'s Vision: "To be the customer champion in a hyper-connected digital world" guides etisalat by e& to utilise technology, analytics and innovation to foster ideas and deliver sustainable and amazing experiences and services to all its customers. This will enable etisalat by e& to realise revenue growth across core and digital services, create additional value for shareholders, provide the best customer experiences in UAE across all segments, be the best tech employer of choice in the region and generate higher Free Cash Flows.

To realise its Vision and Strategic Goals, etisalat by e& will focus on four strategic pathways:

### **Grow** **Share of Wallet in Core & Beyond**

etisalat by e& will enhance its role in consumers' lives by capturing a greater "share of moments" and positioning etisalat by e& as a provider of digital experiences. Whereas, for the business segment, etisalat by e& is aspiring to become the prime Telecom Orchestrator in the UAE thus powering the 4th Industrial Revolution. etisalat by e& will continue to add value to its core by blending with a growing portfolio of digital solutions for consumer and business segments along with accelerating migration to B2B Next-Generation services. This will be supported by network and technology leadership, thus driving value capture of the addressable wallet share across all segments.

### **Scale and Monetise** **New Growth Engines**

etisalat by e& is aiming to become an incubator of digital services to maximise value via a process in which it will 'experiment – grow – nurture – carve-out – monetise' digital engines. This will be delivered via the adoption of innovative operating models to drive valuation upsides for shareholders whilst maximising synergies with the core business. etisalat by e& has defined a clear path for growing digital services that combines the optimum mix of organic and systematic inorganic moves.

### **Excel** **in World Class Customer Experience Delivery**

etisalat by e& recognises Customer Experience as being a differentiator to retain and create value for its customers. As such, etisalat by e& has enhanced its strategic focus on Customer Experience delivery and is transforming all aspects of its Experience offerings, including journeys, insights generation, governance, processes and culture. etisalat by e& is committed to enhancing the digitisation and personalisation of experiences through the implementation of AI.

### **Transform** **into an AI & Data-Driven Organisation**

etisalat by e& will continue simplifying and automating business processes to drive efficiency and agility along with acquiring/ reskilling required talent in line with future ambitions. etisalat by e& will also enhance its AI-driven analytics capabilities to further support informed decision-making across all areas and to progress on its internal and external data monetisation journey.

### **Accelerating digitisation and diversification**

In Consumer, we continued expanding our digital and adjacent services' portfolio in scale and scope by positioning etisalat by e& as a provider of digital experiences rather than a pure connectivity play and accelerated our efforts in delivering unmatched value across traditional core and new digital propositions.

In line with our strategy, we have introduced GoChat Messenger, a new all-in-one free voice and video calling app, giving customers the flexibility of accessing unique features within one application. Within one year of launch, GoChat gained over 2 million users from all over the world. etisalat by e& also introduced new propositions, blending connectivity and digital benefits, such as New Freedom plans, Content Passes, and eLife Ultra packages.

For Smiles, our leading loyalty/rewards platform, 2022 was a pivotal year as we expanded the range of services offered through the platform. Smile users can now order groceries online due to the integration with ElGrocer via a "shop-in-shop" concept, and order food from a continuously expanding range of outlets. Moreover, in November, Smiles introduced Qatar Offers; a new section with offers catered for Smiles' users attending the World Cup. Of note, the Smiles base crossed the 3.3 million users mark.

When it comes to the Business segment, 2022 was packed with many accomplishments, as etisalat by e& has positioned itself as the prime connectivity partner for Hyperscalers, while also supporting businesses in adopting a cloud-first approach and simplifying their digital connectivity needs.

For SMB Customers, etisalat by e& launched Business Pro, an E2E smart and secure connectivity bundle designed specifically for the SMB mass market. etisalat by e& also expanded the SaaS Market Place, which is

a portfolio of Software as a Service (SaaS); on-boarding over 30 new Individual Software vendors (ISVs) under multiple categories to serve SMB customers.

etisalat by e& has also seen significant growth in 5G M2M connections and services via the delivery of several 5G private network PoCs and projects. Further, Connected Car services became a key driver for growth in 2022, with a surge in new contracts with leading automotive companies, such as Honda, Ford, Toyota and others.

In addition, when it comes to our Network leadership, etisalat by e& aims to continue its leading position locally and globally as the fastest mobile network on earth. etisalat by e& also played a major role in maintaining UAE's position as the World leader when it comes to Fibre to the Home (FTTH) penetration. Our continuous FTTH deployment coupled with relentless improvement programs in our fixed network has propelled UAE to be among the top 10 fastest countries globally.

### **Driving continuous innovation**

We are inspired by the future and the limitless possibilities we see in it; we expand and improve our services with the customer always in mind, investing in innovative ideas and going beyond our traditional telecom capabilities.

etisalat by e& launched many innovative products, services and initiatives in 2022, such as:

- Established a leadership position in Metaverse use cases, with the launch of 'e& universe' at GITEX Global 2022, starting with Smart Home Zone, Arena Zone, and Concert Arena
- Launched GoChat Messenger, an all-in-one free voice and video calling app, providing customers with many unique features within one application
- Expanded Smiles into the online grocery space via the introduction of a "shop-in-shop" allowing a fully

operational, Smiles-branded grocery experience for all UAE residents

- Expanded our portfolio of unified communication, collaboration, and contact centre solutions, allowing organisations to shift from legacy voice solutions to agile, secure, and fully managed cloud communication solution
- Launched major IPTV turnkey solutions for healthcare and hospitality verticals, providing full integration to hospitality/healthcare information systems.

In 2022, we continued to leverage advanced AI and Automation technologies to drive impact at scale, resulting in significant improvements in our operations in areas such as:

- More than 80% of consumer transactions are now handled through our digital channels
- Reduced field technicians' time for business services provisioning from 3 hours to 30 minutes
- Reduced provisioning time for Autonomous Network fulfilment of transport links from 30 days to 4 days, in addition to reducing nodes provisioning and links activation from 5 days to 30 minutes
- Achieved a 55% reduction in IPTV complaints thanks to enhanced Self-care capabilities
- Reduced Business service requests fulfilment lead time by 30%

### **Enhancing service and experience for customers**

We understand that a continuous focus on customer experience and further acceleration of our digital footprint will play a pivotal role in winning customers' hearts and minds. To this end, we appointed within our organisation a Chief Customer Experience Officer, directly reporting to our CEO. This is a first for etisalat by e& and demonstrates our unwavering commitment to excelling in customer experience.

2022 was notable for several experience achievements; Consumer digital sales grew four-fold compared to 2021, enabled by major enhancements to digital & self-assisted channels. Another milestone was integrating UAE Pass into 'My etisalat' app, increasing app adoption, and boosting registered users to 4.75 million by year-end. 'My etisalat' app also gained several new features and capabilities, as well as new payment methods, helping increase app satisfaction.

etisalat by e& also expanded its personalised deals section 'Make your own offer', allowing customers to configure their personalised post-paid deals in real-time and enjoy them instantly. etisalat by e& also continued the roll-out of Next Generation stores aimed at providing a brand-new retail experience with a strong focus on self-service, reaching 75 stores by end of 2022.

For Consumer customer care, etisalat by e& scaled up the capabilities of its AI-powered Virtual Assistant, and also expanded automated functions by adding more than 400 Robotics Process Automation (RPA) robots, and launched a WhatsApp-based care channel, providing customers a new fast and convenient care channel.

For Business customer care, etisalat by e& launched 'Unified Helpdesk', a unified helpdesk for its bespoke customers, with a dedicated team offering support through a dedicated email and toll-free number. Similarly, etisalat by e& launched the 'Global Helpdesk', an end-to-end support desk for global customers, available round the clock, provided through a team of dedicated service advisors as well.

### **Continued growth and strategic progress in 2023**

In 2023, we will build on the results and achievements of 2022, with a focus on expanding our portfolio of digital and adjacent services and thus growing digital

revenues. Moreover, we have ambitious plans for Smiles based on further growth and consolidation into a Super-App.

We will deploy a unified platform for mobile services for Business customers and deploy private networks, and accelerate 5G rollout, while also establishing a 5G centre of excellence to support customers to create new offerings and derive increased value from 5G.

We also plan to consolidate the wholesale business of operating companies, with a focus on the messaging domain, as well as grow our data business by attracting more customers to the SmartHub eco-system and launching Fibre-to-the-Room (FTTR).

Internally, we will scale up our implementation of AI as we progressively transform into an AI and data-driven company. This will encompass optimisation of our governance model around data management, growing our AI use case factory, and adopting an AI-first approach across our business and operating models.

Given the evolving needs of our customer base and our appointment of a dedicated customer experience executive, we will continue with our unparalleled focus on customer experience as we continue to enhance all customer journeys and channels.

Finally, we will continue to explore and invest in Metaverse technologies, engaging and monetising one of the most exciting social landscapes. We are looking forward to deploying real-life applications that will enrich and create long-term value for our customers and shareholders.