

Mobile broadband and value added services

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- Role of the Network Operators in improving Value Added Services

Etisalat is one of the largest telecommunications companies in the world with over 32 years of experience

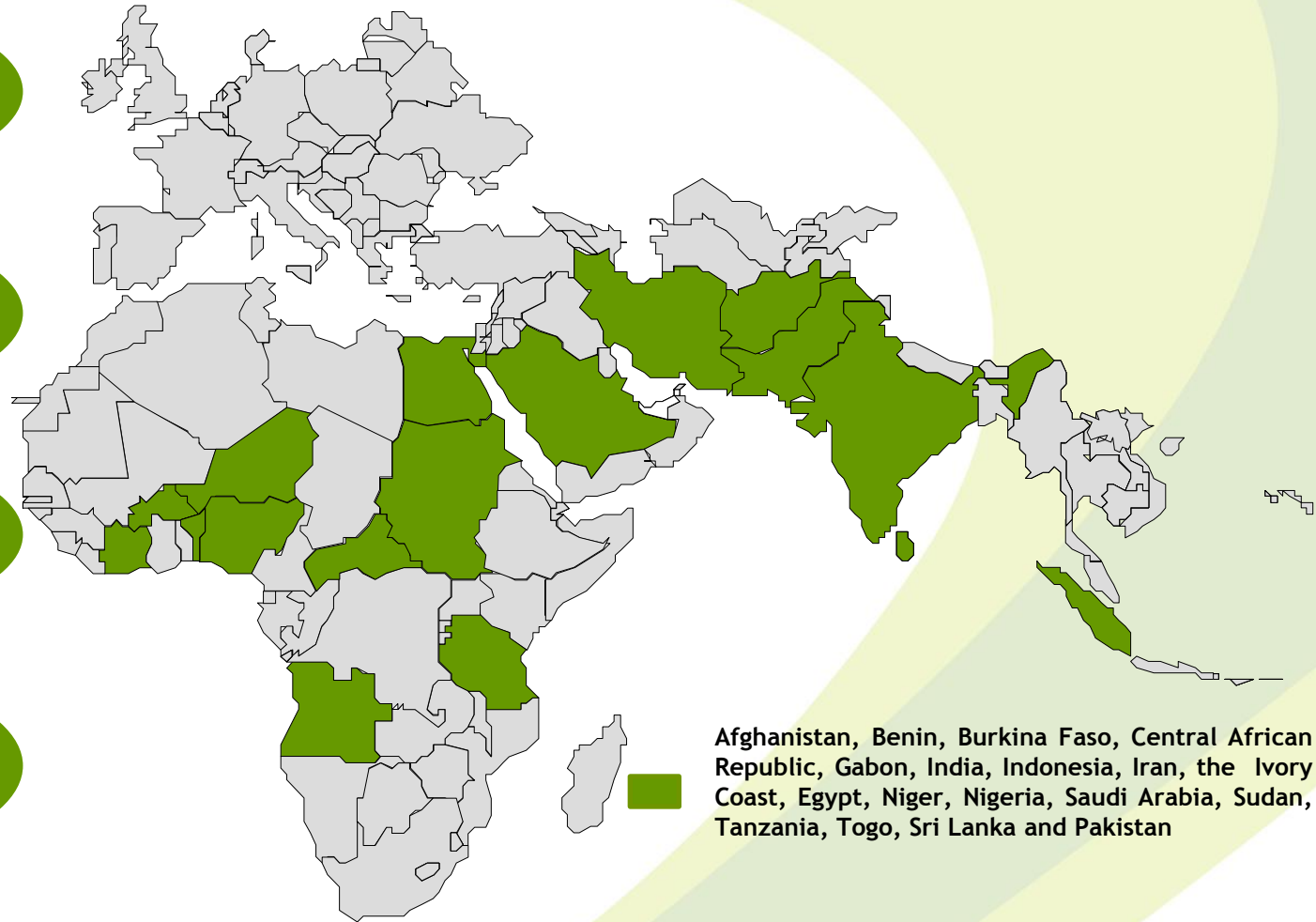


Headquartered in the UAE

Operates in 18 countries across Asia, the Middle East and Africa

Over 100m customers and ~ 1.9bn people covered

Official international partners of FC Barcelona



Afghanistan, Benin, Burkina Faso, Central African Republic, Gabon, India, Indonesia, Iran, the Ivory Coast, Egypt, Niger, Nigeria, Saudi Arabia, Sudan, Tanzania, Togo, Sri Lanka and Pakistan

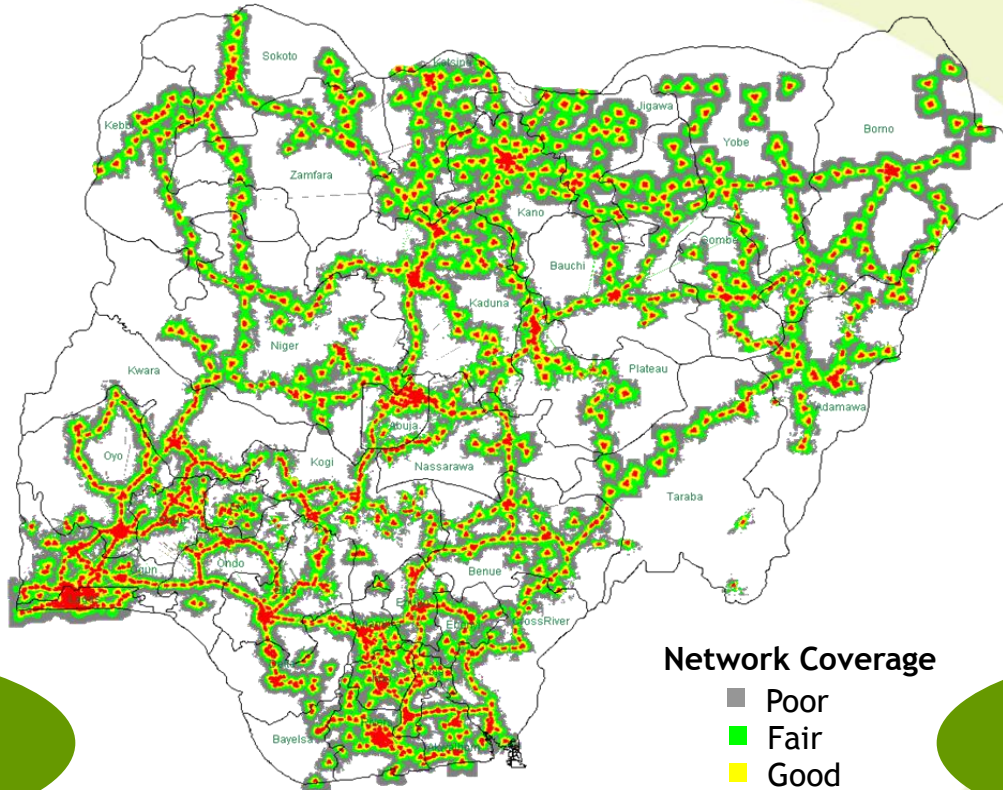
Etisalat Nigeria, was the 5th GSM entrant into the Nigerian telecom market and has achieved major milestones since launch

Launched services in 7 major cities in October 2008

Achieved coverage in 36 states at the end of 2009

Rapidly expanding on current coverage of >70% of population

15m subscribers as at June 2013



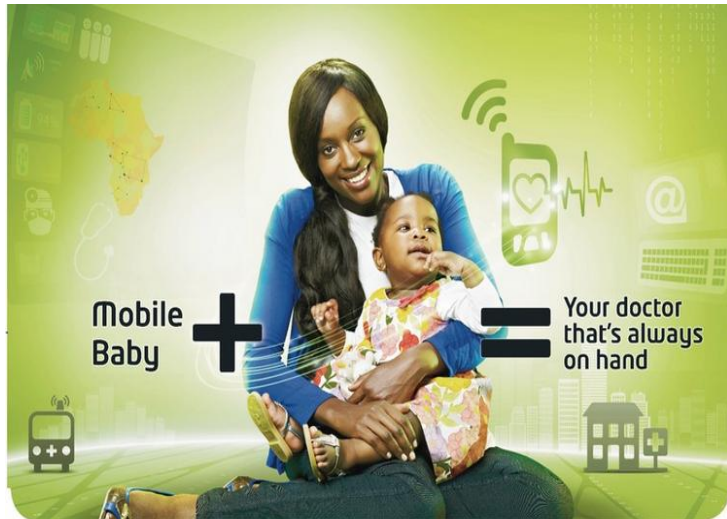
Awarded Best Quality Network one year after launch

~ Over 3000 BTSs by 2013

Over 1,400 employees in 2013

Etisalat recently won the 2012 Global award for “best Mobile Product for Women in Emerging Markets” for its Mobile Baby mHealth initiative

Etisalat’s Mobile Baby service (mHealth Initiative)



Insights

- Developed in partnership with Qualcomm, WHO, D-Tree International and Great Connection Inc
- Successfully deployed in Saudi Arabia, Tanzania, United Arab Emirates and Nigeria in 2011, and is expanding to Afghanistan and Ivory Coast soon

Service Description

- Mobile phone-based decision support
- Identification and reporting of danger signs during labor and delivery
- Data storage/remote diagnosis
- Ultrasound-based remote monitoring of pregnancy evolution communication
- Messaging for new mothers and mothers-to-be
- Communication with referral facility indicating emergency transfer and requirements on arrival
- Mobile payments for emergency transportation

Impact

- Improvement in maternal health
- Educational and training programmes
- Integration of mHealth and mobile money
- Localized in various languages
- Since launch, over 500 birth attendants and midwives have been fully trained and over 10,000 pregnant women have been registered with the programme

The availability of mobile broadband drives the provision and adoption of mobile Value Added Services (VAS) and vice versa

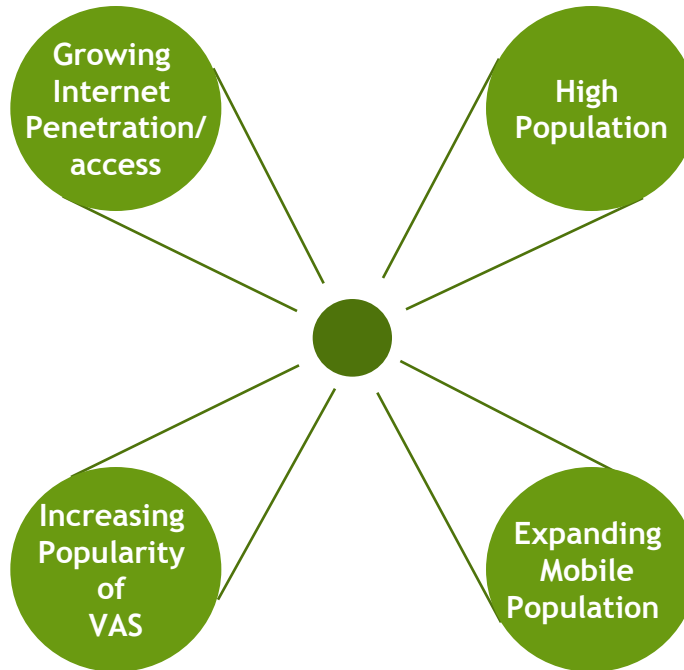
The Ideal Cycle of Broadband Development in Nigeria



Nigeria is focusing on improving infrastructure to support and drive various applications and services

The following statistics point towards further advancement of mobile value added services

- Internet penetration of 28.4%
- Largest internet population in Africa
- 11th largest in the world
- Average Nigerian citizen spends not less than 3 hours on the internet daily



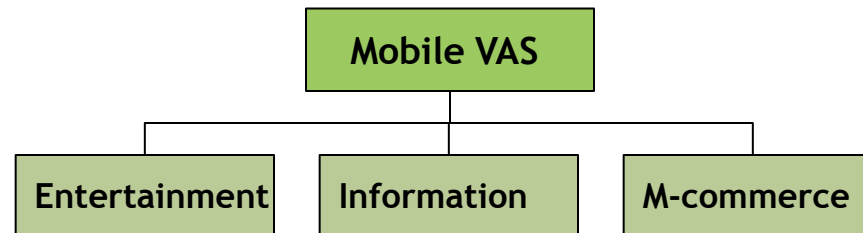
- At least 9 million social media users in Nigeria
- Putting penetration around 5.4%

- Over 167 million people as at 2012
- Annual growth rate of 2.3% and set to double in the next 30 years
- Most populous country in West Africa
- Seventh most populous in the world

- *110 million mobile phones on Nigeria
- Mobile penetration of 69.01%
- 25% of mobile subscribers use Smartphones; 59% use basic feature phones; 16% use advance feature phones

The benefits of value added services cannot be overestimated

Generic Mobile Value Added Services Categories



Benefits of Value Added Services

- More than just basic telephony
- Drives broadband usage
- Triggers entrepreneurship/employment generation
- Ultimately, drives the growth of the economy

To enhance value added services and its benefits, network operators have roles to play and essentials to put in place

Products and Services

- Innovation in services and applications
- Content and applications that drive usage
- Product simplicity

Quality of Service

- Increase spread of broadband infrastructure
- Provision of high speed data services
- Handset upgrade/customization

Customer Education

- Increase knowledge of device operations
- Increase customer support
- Aggressive marketing and promotion
- Product and service information

Partner Relationship

- Right platforms and systems
- Product and service support
- Technical expertise
- Service Level Agreements