



INVESTOR PRESENTATION

Zain Group Q3 2024 Results

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OUR GROUP AT A GLANCE – 9M 2024



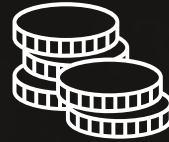
**47.2
MILLION**

ACTIVE CUSTOMERS
-9% YoY



**\$4.71
BILLION**

IN REVENUE
KD1.45 Billion
+2% YoY



**\$1.65
BILLION**

IN EBITDA
KD505 Million
Normalized Growth
+0.4% YoY

+35%
EBITDA
MARGIN



**\$442
MILLION**

IN NET INCOME
KD136 Million
Normalized Growth
+6% YoY



**10
CENTS**

IN EPS
31 FILS

OUR OPERATIONS



Over

8,600

EMPLOYEES



KUWAIT



KSA



IRAQ



SUDAN



JORDAN



BAHRAIN



SOUTH SUDAN

Contribution

REVENUE %

CUSTOMERS %

19%

5%

43%

19%

17%

41%

4%

19%

9%

9%

3%

3%

1%

4%

- ZAIN HAS A 15.5% OWNERSHIP IN MOROCCAN MOBILE OPERATOR "INWI"
- ZAINTECH, ZOI & TASC TOWERS HAVE THEIR HQs IN UAE

4SIGHT

Creating Our Sustainable & Digital Future



01 Digital Transformation

Transforming the telco core to provide customers with the best experience, while simultaneously streamlining the back end and reaping the best of analytics for Zain to thrive and even lead in the digital era



02 Enterprise and Government

Working closely with organizations of all sizes to provide them with the necessary connectivity and the latest solutions required to achieve their business and operational objectives

EVOLUTION OF TELCO



03 Fixed and Convergence

Transforming from a mobile centric telecom into an integrated player offering fixed-mobile convergence and serving the needs of consumers and businesses



04 Portfolio Optimization

Continuously seeking opportunities to realize synergies and unlock potential value through M&A activities

ICT 01



Establishing a regional center of excellence developing and providing the latest ICT, managed services and digital solutions

Digital Infrastructure 02



Building a leading independent digital infrastructure player including TowerCo, Data Center Co, Fiber Co and others as relevant

GROWTH VERTICALS

Fintech 03



Introducing a suite of digital financial and insurance services contributing to the evolution of the region's digital ecosystem

Digital Services 04

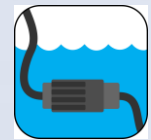


Leading the development of the digital services' landscape in the region

ZOI TO ESTABLISH A ONE-OF-A-KIND PAN MIDDLE EASTERN NETWORK TOGETHER WITH EXTENSIVE GLOBAL ASSETS

- Zain Group and Omantel launched Zain Omantel International (ZOI) at the ITW Wholesale event in Washington, with HQ in Dubai. The first regional wholesale JV.
- ZOI is owned by Zain Group, Zain KSA & Omantel and will initially have an asset-light model (managing the shareholders' assets) while building its own network.
- By combining the strengths of its owners, ZOI will act as a global wholesale provider by offering unique propositions to the Group's OpCos and third parties.

OBJECTIVES



Manage/invest in the regional & int'l subsea and terrestrial networks connecting OpCo countries & key international target markets.



Create new revenue, cost efficiencies and value creation opportunities in the businesses of OpCos and shareholders.



Increase the utilization of international assets across Zain Group and Omantel.

SERVICE SCOPE



INT'L VOICE



INT'L MESSAGING



INT'L CONNECTIVITY



GLOBAL ENTERPRISE PRODUCTS



ROAMING

zoi
A Zain & Omantel Company

ZAIN OMANTEL INTERNATIONAL : UPDATE ON CABLE NETWORK



- Zain is part of the Pakistan to East African and Europe system Africa-1, and the landing party in Sudan.
- Besides Sudan, Africa-1 connects Kenya in phase 1, followed by expansion along the coast to South Africa in phase 2.
- Africa-1 will provide much-needed connectivity to the African continent, enabling ZOI to expand its market reach.



- Zain owns a stake in the Blue Raman System, a joint consortium cable between Google, Omantel, and Sparkle.
- Blue Raman is the latest generation high-capacity system connecting India with Europe, over the Middle East.
- ZOI will manage sales on behalf of the consortium and also manage the assets of Zain and Omantel.



- The PEACE cable is a JV between PCCW and Hengtong, connecting Asia, the Middle East, Africa, and Europe.
- Zain is deploying a full solution from Jeddah to Europe with its own branch and landing station in Jeddah.
- PEACE will enable Zain to rely less on third-party networks for serving its OpCos, reducing its cost-base.

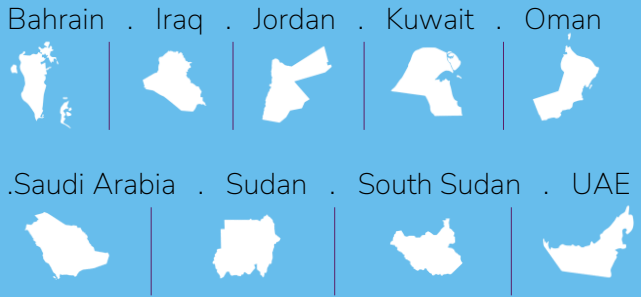


- ZOI is building a +7,000 km redundant fiber network connecting KSA with all neighboring countries in multiple rings.
- This first-of-its-kind PAN-ME network will position ZOI as the only player to connect all GCC countries (and Yemen, Iraq, and Jordan) on its own network, offering unique services between the Indian Ocean, Arabian Gulf, and Red Sea.

THE SUBSEA CABLES WILL PROVIDE ZAIN WITH FULL OPERATIONAL INDEPENDENCE AND A GENUINE CRITICAL FACTOR CAPABLE TO FOSTER DIGITAL TRANSFORMATION INITIATIVES IN THE REGION, PARTICULARLY FOR CLOUD AND IOT SERVICES.

THE REGIONAL INTEGRATED DIGITAL SOLUTION PROVIDER, UNIFYING ZAIN GROUP'S ICT ASSETS TO OFFER A UNIQUE VALUE PROPOSITION OF COMPREHENSIVE DIGITAL SOLUTIONS AND SERVICES UNDER ONE ROOF.

REGIONAL BIGGEST FOOTPRINT



STRATEGIC PARTNERSHIPS



LINES OF BUSINESS
 CLOUD, CYBERSECURITY, BIG DATA, IOT, AI, SMART CITIES, DRONES AND ROBOTICS, AND EMERGING TECHNOLOGIES.

ACQUISITIONS



ZAIN FINTECH MILESTONES



- Electronic Money Service provider licenses secured from CBK in July 2024
- New platform soft launch and testing by Zain staff is expected in Q1 2025.
- Commercial discussion under finalization through Boubyan Bank with KNET as technical integration was agreed.
- International remittance proposal submitted by Alansari is currently under CBK's review for approval.

- Soft launch started Mar '24, Mass marketing on Mid Jun '24.
- Despite the operating revenue shortfall due to late go to market and disruption caused by Al-Salam's acquisition of KFH, the number of financing is in a growing trend since inception.
- The digital campaigns are more active in Q3, planning for aggressive campaigns in Q4.



- Q3 performance saw record loan sales with continued focus on better quality portfolio driving better future performance.
- Tamam in final UAT of migration to new core system and middleware.
- Tamam secured approval from SAMA for instore installment finance for Samsung devices.
- Pending regulatory approval, Tamam will offer financing above SAR 50,000. and new product initiatives micro-credit cards and BNPL.

- Introducing a strategically focused marketing campaigns for credit card use cases.
- Expanding activations in schools / clubs to strengthening our connection with younger generation.
- Technical Platform enhancement, establishing a clean app version for future releases which will guarantee the smooth fast delivery.

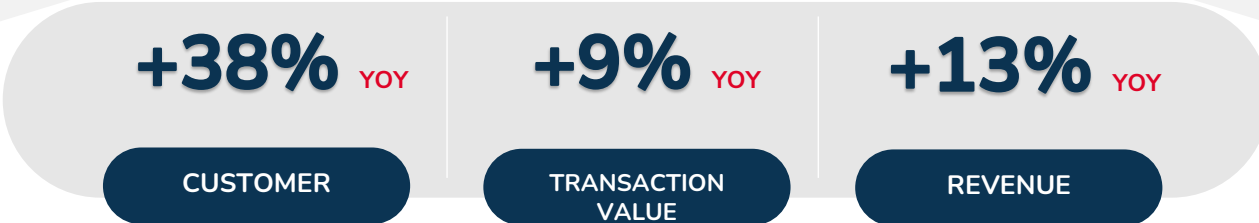


- FOO Update: continue to provide the required support for Zain Fintech operations in multiple countries, currently being engaged to develop and enhance the technical platforms backend and frontend for Tamam KSA, Bede in Bahrain and Kuwait, and OM Pay in Oman

- New fintech platform being developed by Huawei with new architecture.
- New GTM plan being prepared and launch with the Zain's Fintech brand "Bede powered by Zain"



- Ongoing discussions to improve the partnership agreement with M-Gurush



ZAIN VENTURES

- Zain Ventures is the Corporate Venture Capital arm of Zain looking for opportunities in the world of venture capital.
- Invested in regional and international VC funds as well as direct strategic investments, creating synergies and leveraging on Zain's geographical reach and customers.

INVESTED AMOUNT	EXISTING VALUATION
\$19.9m	1.5x

INVESTMENT IN FUNDS



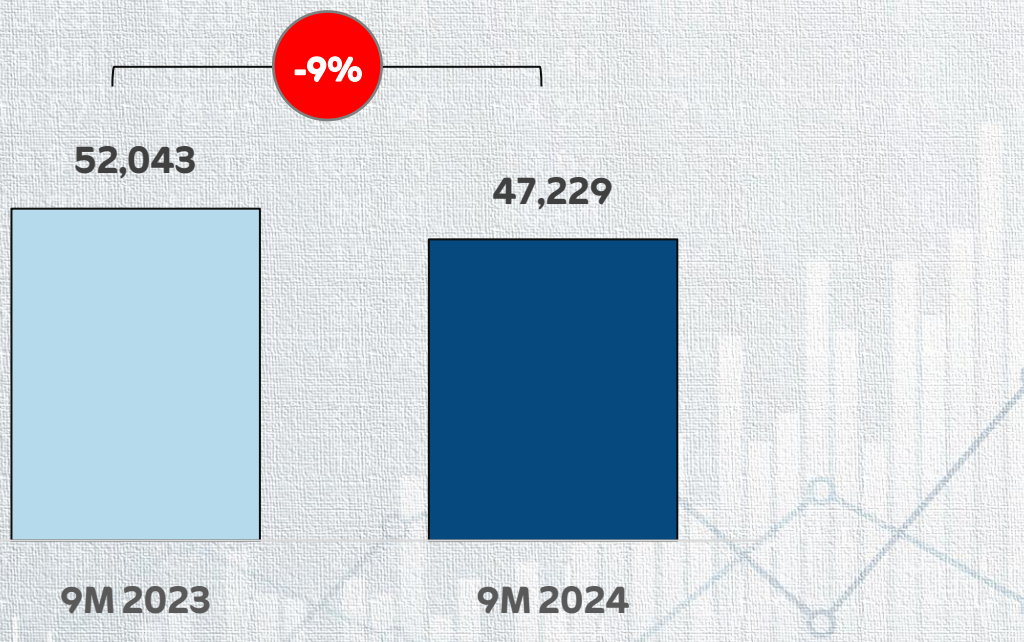
ZAIN HAS EVOLVED AS AN ACTIVE PLAYER WITH A FOCUS ON STRATEGIC INVESTMENTS

GROUP FINANCIAL REVIEW



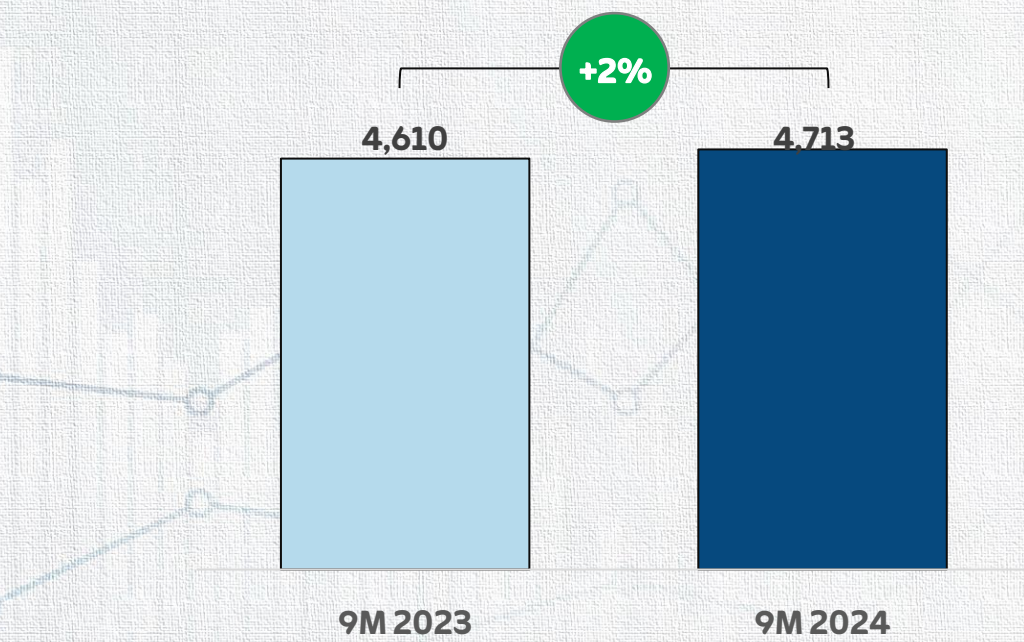
GROUP KPIs

CUSTOMERS ('000)

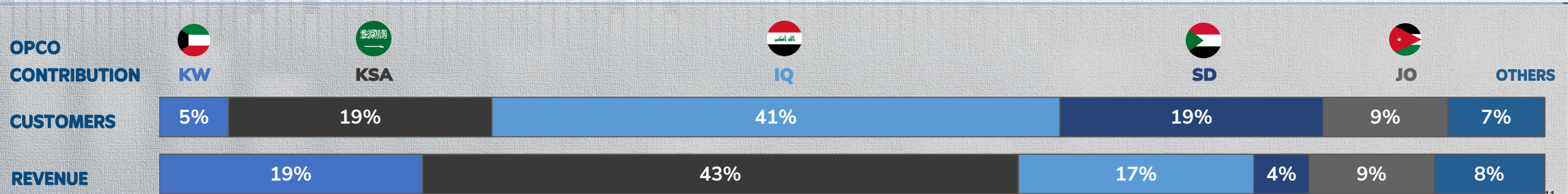


The customer base has been notably affected by the ongoing challenges in Sudan.

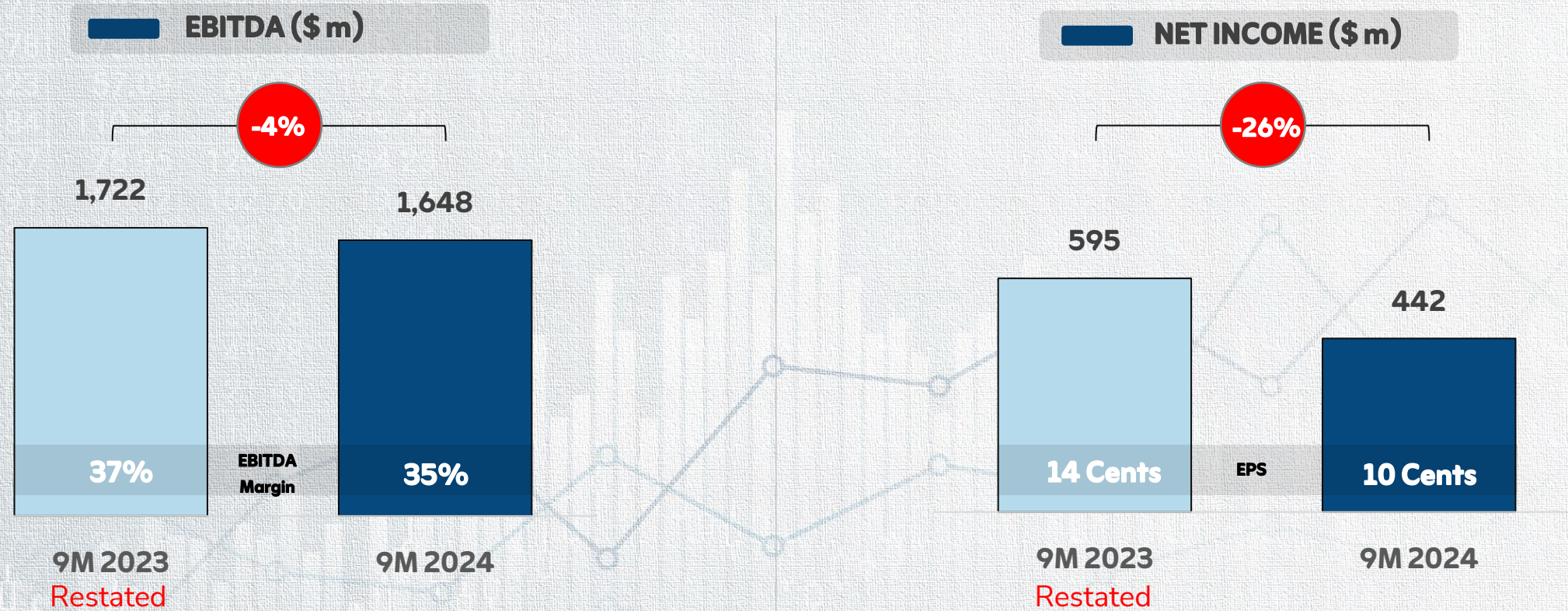
REVENUE (\$ m)



Strong top-line performance across all operations, excluding Sudan due to ongoing crisis and network challenges



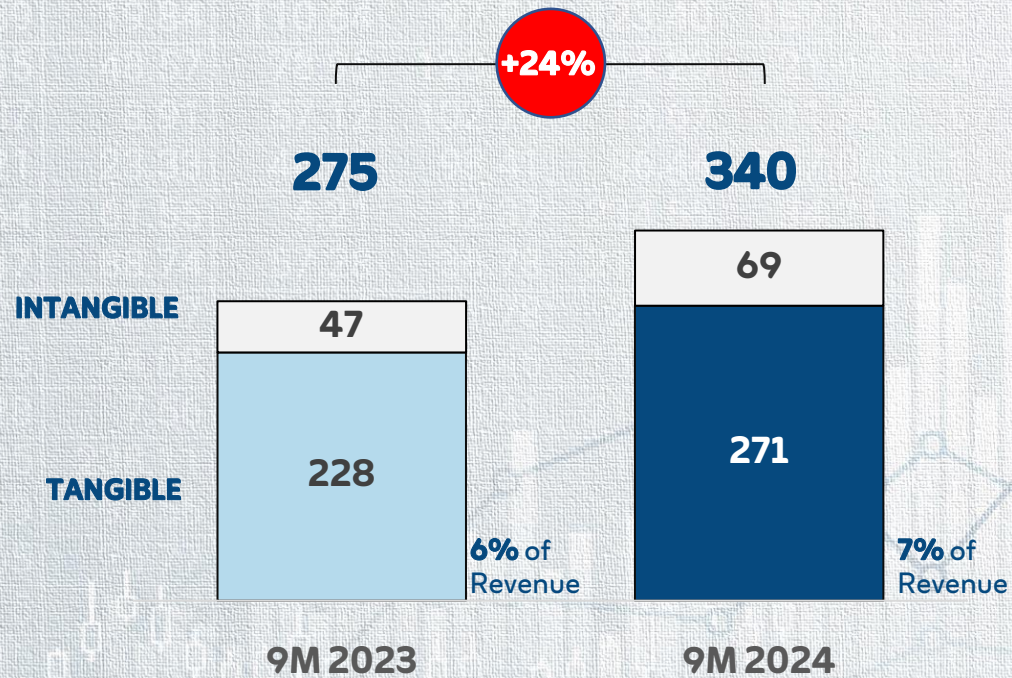
GROUP EBITDA & NET INCOME



- For 9M 2024, **Normalized EBITDA** growth and **Normalized Net Income** growth was **+0.4%** and **+6%** YoY respectively.
- Normalized EBITDA and net income growth are adjusted to the **number range claim** and **Tower transaction gain** in 9M 2023.
- Impact of Ongoing war and currency devaluation in Sudan from **SDG 638/USD** in Sep'23 to **SDG 1,982/USD** by end of Sep'24.
- Impairment of Fixed Assets in Sudan USD 21 million in 9M 2024

GROUP TOTAL CAPEX

(USD m)



- Continuation of expansion of 5G & 4G networks across Opcos
- Investment in FTTH in Jordan to reach more homes and regions
- IT BSS modernization across many opcos
- Data Center Modernization
- Transmission capacity upgrades

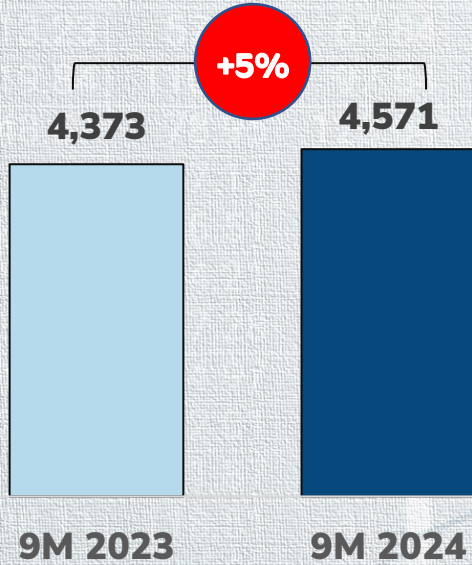
OPCO CONTRIBUTION



DEBT PROFILE

(USD m)

DUE TO BANKS(\$ m)

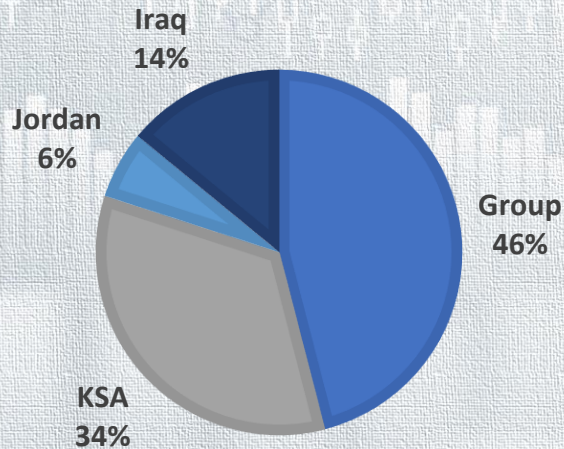


~2.2x
Total Net Debt / EBITDA
Among the lowest in the region

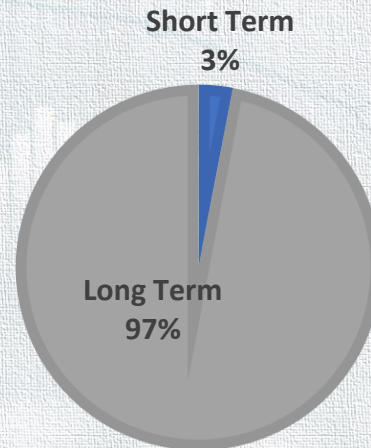
Effective Interest Rate

6.66%
As at 30 Sep 2024

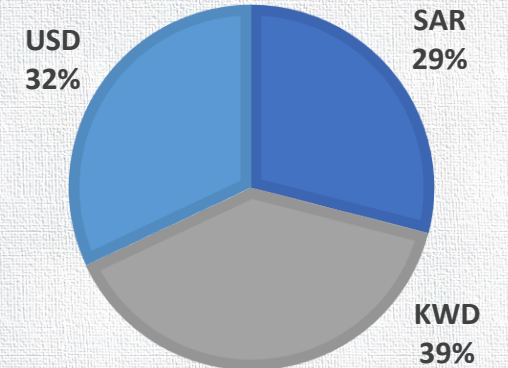
DEBT BY OPCO



DEBT BY MATURITY



DEBT BY CURRENCY



GROUP FINANCIAL KPIs

(KWD m)

Restated

Income Statement (KWD m)	9M 2024	9M 2023
Revenue	1,445	1,415
EBITDA	505	529
Net Income	136	183
EPS (Fils)	31	42

Balance Sheet (KWD m)	Sep 2024	Sep 2023
Cash and Cash Equivalents	213	282
Total Assets	4,945	5,024
Total Debt	1,396	1,351
Total Equity	1,857	1,982

Cash Flow (KWD m)	Sep 2024	Sep 2023
Operating	290	350
Investing	(139)	14
FCF	151	364
Financing	(220)	(319)
Effect of FX impact	(34)	(5)
Ending Cash & Cash Equivalents	210	266

Zain Group Q3-24 revenue grew 3% compared to Q3-23 due to strong top-line performance across major operations mainly Bahrain (+13%), Iraq (+10%), Kuwait (+4%) and KSA (+2%). Zain Group was able to achieve revenue growth despite the ongoing conflict and the associated network operational challenges in Sudan. Zain Group Q3-24 net income increased 1% compared to Q3-23, mainly due to top line performance.

Zain Group 9M-24 revenue grew 2% YoY due to strong top-line performance across all major operations mainly Iraq (+12%), Bahrain (+7%), (Kuwait (+6%) and KSA (+4%). This is despite the ongoing conflict in Sudan, which resulted in significant network operational challenges and currency devaluation. However, network services and coverage areas in Sudan are gradually improving.

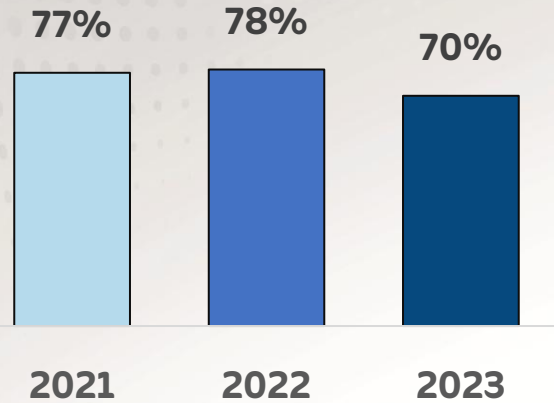
The decrease in 9M-24 net income compared to restated 9M-23 net income is mainly due to one-time 'gain on sale and leaseback of KSA tower transaction' amounting to KD 90m (Group share: KD 33m) during 9M-23 and one-time gain from Kuwait Number range claim in 9M-23. Excluding the impact of Tower transaction gain and number range claim in 9M-23, normalized net income for 9M-24 increased 6% YoY.

The restatement of the 9M-23 consolidated statement of profit & loss was due to the accounting of KSA tower transaction which was revisited in the fourth quarter of 2023 due to the significant judgements and estimations involved in assessing transfer of control.

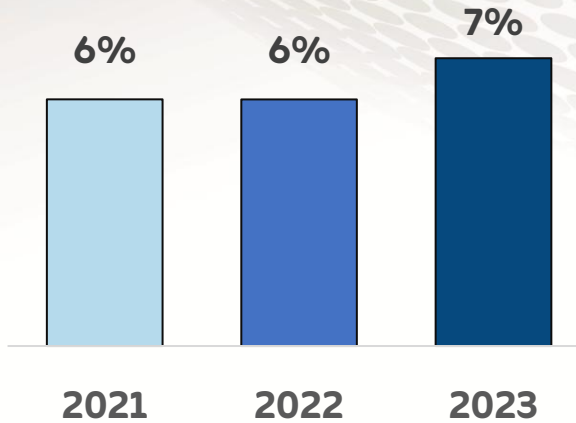
There is no impact of above restatement and reclassifications on the net profit and the consolidated financial statement reported and issued as at 31 December 2023, as all necessary adjustments required have already been accounted for in the consolidated financial statements for the year ended 31 December 2023.

DIVIDENDS

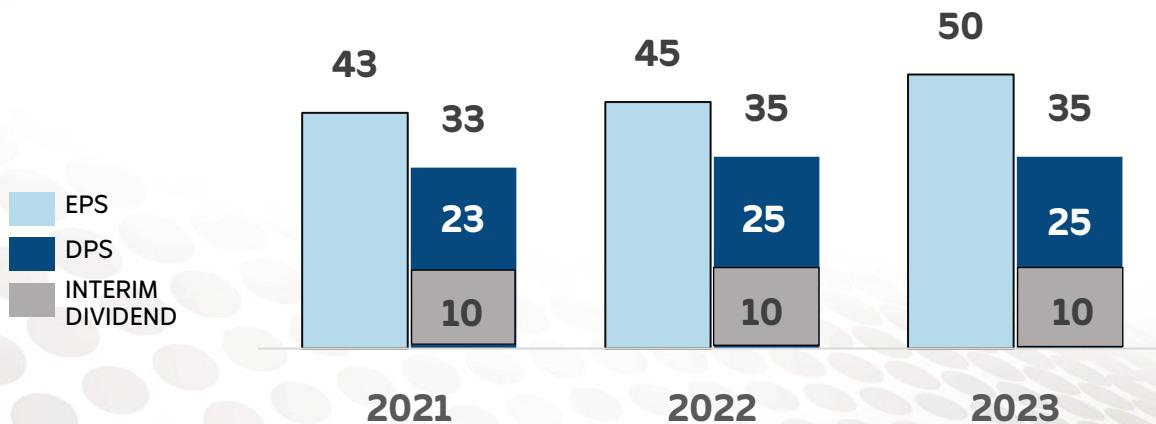
DIVIDEND PAY-OUT RATIO



DIVIDEND YIELD



EPS & DPS (Fils)



- The interim cash dividend of 10 fils (KD 43.3 million) was distributed to eligible shareholders on October 6, 2024, for the first half of 2024.
- 75% range - Average dividend payout ratio.
- **Dividend Policy:** A minimum cash dividend of 35 fils per share for three years, commencing 2023.

ZAIN SHARE PRICE

TOTAL SHARES

4,327,058,909

P/E

~12 TIMES

MARKET CAP

USD 6.7 BILLION

ZAIN SHARE PRICE VS. PREMIER MARKET INDEX MOVEMENT



SHARES

4,327,058,909

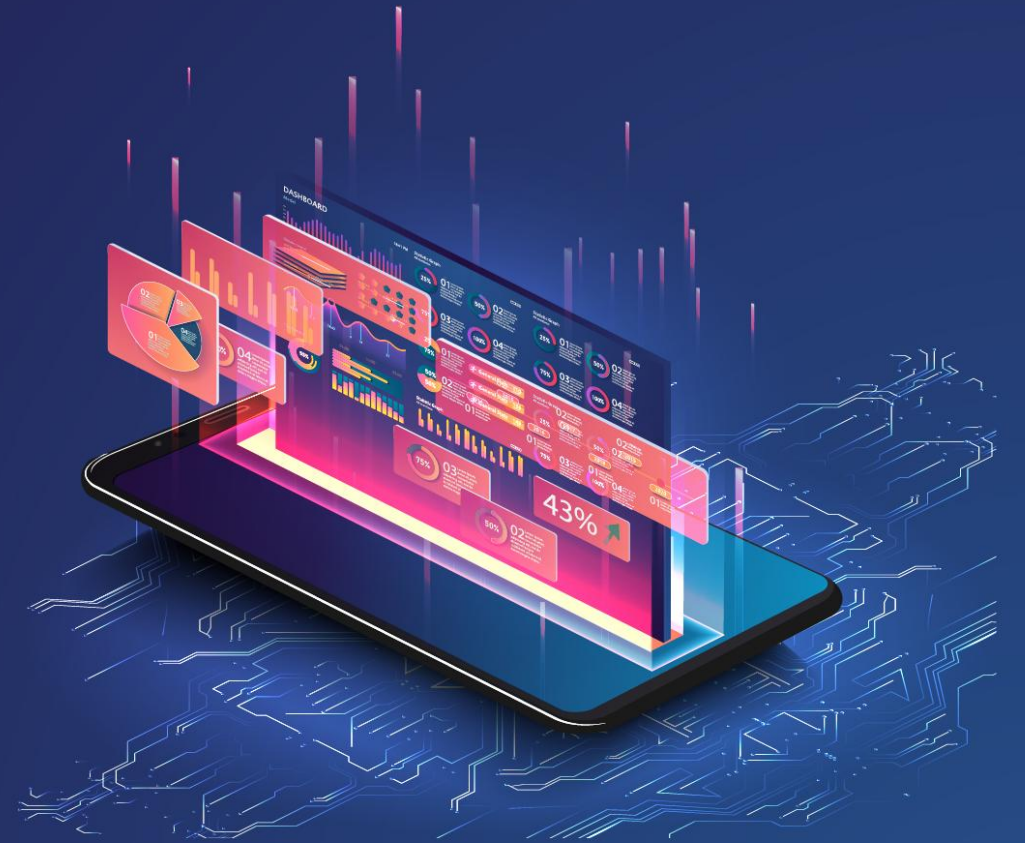


**NET
PROFIT**

**136m
KUWAIT DINARS**

THE SUSTAINED TRUST AND CONFIDENCE OF OUR SHAREHOLDERS ENABLED US TO REMAIN FOCUSED ON ACHIEVING OUR STRATEGIC OBJECTIVES AND MAXIMIZING RETURNS IN THESE CHALLENGING TIMES

OPERATIONAL REVIEW






NAWAF ALGHARABALLY
CEO




100%



OWNERSHIP

1983












OPERATIONS

- 🌀 Zain Kuwait maintains **its market lead** in terms value share, with **customer base of 2.6m**
- 🌀 Noticeable achievement in **B2B** by winning major deals
- 🌀 **Zain Plus Program** reached a significant milestone, setting a new sales record
- 🌀 **Data revenue** formed **35%** of total revenue
- 🌀 **Sustainability Progress:** Phase 1 of the solar solution deployed at Zain HQ car park, contributing to **CO₂ reduction**
- 🌀 Sunset **3G network** in Kuwait by no later Q2 2025



* Normalized Growth

								
2.6M	33%	39%	\$23	53%	5G	\$71M	100%	181%
CUSTOMER BASE	MARKET SHARE	VALUE SHARE	BLENDED ARPU	PREPAID BASE	NETWORK TECHNOLOGY	TOTAL CAPEX	POPULATION COVERAGE %	MARKET PENETRATION



SAAD AL SADHAN

CEO



- Normalized Net income growth for 9M 2024 was **33% YoY** (Excluding the tower transaction gain)
- 5G, B2B, MVNO, Yaqoot,** and **Tamam** continue to drive Zain KSA growth
- Noticeable achievement in **B2B** by winning major deals
- Tamam** revenue increased **24% YoY**, and Net income grew **72%**
- Digital operator **Yaqoot** revenue has grown **21% YoY**
- Data revenue** grew by **4%** and formed **40%** of total revenue
- MSCI ESG Rating:** Achieved 'AA' rating, classified as a “**Leader**”
- MVNO** segment including **Redbull** and **SALAM** achieved exceptional growth



* Normalized Growth



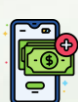
9.0M

CUSTOMER BASE



\$16

BLENDED ARPU



62%

PREPAID BASE



5G

LARGEST NETWORK IN THE REGION



\$110M

TOTAL CAPEX



99%

POPULATION COVERAGE%



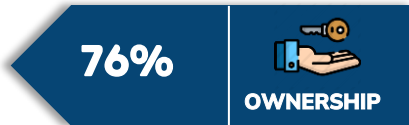
127%

MARKET PENETRATION

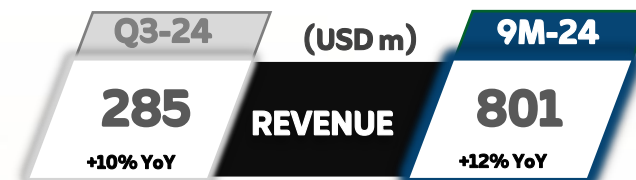
ZAIN IRAQ



EMRE GURKAN
CEO



- 9M'24 Normalized Net Income grew **141%**, excluding 2023 TowerCo gain
- Effective cost optimization initiatives have enhanced operational efficiency
- Data revenues continues strong growth, achieving new high levels
- B2B revenues grew **22% YoY**
- Launched new **Kafoo** flagship value proposition
- Record **Ziyara** season with a 20% increase in activation revenue compared to 2023
- CMC and MOC to move forward with the **4th license operator** in Iraq



19.5M
CUSTOMER
BASE



51%
MARKET
SHARE



43%
VALUE
SHARE



\$5
BLENDED
ARPU



91%
PREPAID
BASE



4G
NETWORK
TECHNOLOGY



\$38M
TOTAL
CAPEX



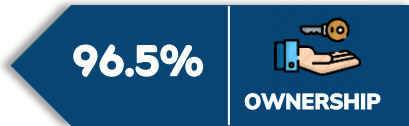
99%
POPULATION
COVERAGE %



102%
MARKET
PENETRATION



FAHAD ALJASEM
CEO



- Expanding the 5G network, attracting new customers, and migrating customers from 4G to 5G
- Data revenue grew by 7% YoY, and formed 51% of total revenue
- Expansion of FTTH network boosts revenue and customer base
- B2B revenues grew 3% YoY
- Settlement agreement with TRC, which include revamp of revenue share ratios, 10-year extension of 2G, 3G & 4G spectrum licenses, a 25-year 5G license for an amount of around \$120
- Decrease in License amortization due to license extension based on settlement agreement



4.3M
CUSTOMER
BASE



35%
MARKET
SHARE



43%
VALUE
SHARE



\$11
BLENDED
ARPU



51%
PREPAID
BASE



5G
NETWORK
TECHNOLOGY



\$13M
TOTAL
CAPEX



99%
POPULATION
COVERAGE %



83%
MARKET
PENETRATION

ZAIN SUDAN



HISHAM ALLAM
CEO



100%

OWNERSHIP

2006

OPERATIONS

- 🌀 Disaster Recovery (DR) including a new data center that has resulted in the network operating at **40%** of its capacity, has brought over **5 million customers** back to our network
- 🌀 Impairment of Zain Sudan Assets of **USD 21 million**
- 🌀 Currency devaluation in Sudan from **638 SDG/USD** in Sep 2023 to **1,982 SDG/USD** at the end of Sep 2024 resulted in a foreign currency translation impact, costing the Group **USD 188 million** in revenue and **USD 87 million** in EBITDA for 9M 2024
- 🌀 **Bede Fintech:** Post the launch of the new network in Sudan, the Fintech offering is being revised
- 🌀 **Plan Z** initiative to support Zain Sudan Employees affected by the war



8.7M
CUSTOMER
BASE



53%
MARKET
SHARE



47%
VALUE
SHARE



\$2
BLENDED
ARPU



100%
PREPAID
BASE



4G
NETWORK
TECHNOLOGY



\$69M
TOTAL
CAPEX



90%
POPULATION
COVERAGE %



44%
MARKET
PENETRATION

ZAIN BAHRAIN



DUNCAN HOWARD
CEO



65% OWNERSHIP

2003 OPERATIONS

- 🌀 **Data revenue** formed **46%** of total revenue and grew **6%** YoY
- 🌀 Focused on the continued expansion of **5G** and **4G** infrastructure
- 🌀 Strong growth in **B2B** fiber
- 🌀 **Bede Fintech** is making significant progress
- 🌀 **Annual license fee** increased from **1%** to **2%** effective **January 1, 2024**



\$16

BLEND
ED ARPU



5G

NET
WORK
TECHNOLOGY



\$4.7M

TOTAL
CAPEX



100%

POPULATION
COVERAGE %



169%

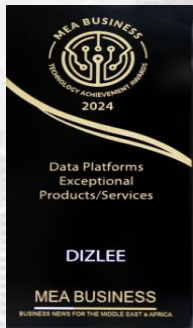
MARKET
PENETRATION



ONE STOP SHOP ENABLER FOR API MONETIZATION IN THE MENA REGION : Dizlee's portfolio is expanding by leveraging on technologies to deliver digital services

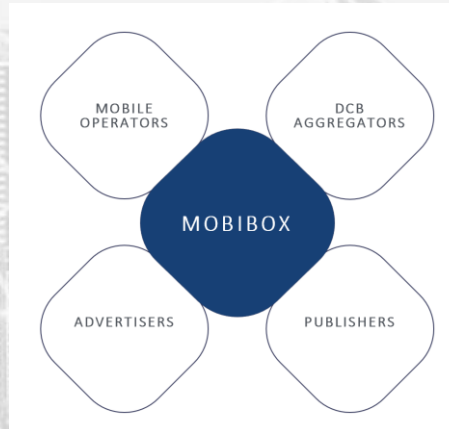
Direct Operator Billing

- Connect your business to the World of Zain, we are connected to over **54 Mn** customers across Zain Operators and Omantel
- DoB Business is growing with **213 live services**
- Dizlee's target for 2024 is to contribute **\$101Mn Gross & \$19Mn Net to Zain OpCos**
- Dizlee won the **MEA Business award for Data Platforms Exceptional Products/Services**



Digital Advertising

- Dizlee's **Digital Advertising vertical** is developed and expect to grow more rapidly
- **Added value** is being generated to the operators by maintaining revenues without increasing complaints
- Process to **onboard** new and existing partner underway. This new revenue stream has started bringing revenues and expect to improve over the coming periods



API Marketplace

- **API Marketplace** API marketplace was soft launched in Q3 2024 and the integration with payment gateway is completed



- **5 PoC's** in progress – discussions with **15 potential partners & 21 customers**, onboarding discussions are underway



- Plan to **expand** across all MENA countries to capture significant market share

Dizlee's contribution to OpCos digital revenue is significant despite all challenges and as a stand-alone entity, Dizlee is growing

ZAIN ESPORTS

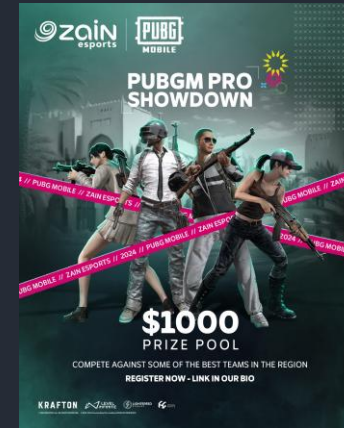
- Acquisition of 'Duwaween Games', a Kuwait-based publisher specializing in developing community-based games for the GCC audience.
- Duwaween Go-to-market for sponsors activated with revamped sponsor benefits
 - First three prospects locked in, sponsored tournaments to commence in Q4
- Zain esports has partnered with Fonz for an E-commerce platform
 - Contract in Final stages
 - Development 90% completed – soft launch planned for Q4
- Zain esports activations restarted for 2024 with an inaugural FC24 activation In Avenues and Al Khairan Mall in Kuwait
 - League of Legends 1v1 Tournament
 - PUBGM Influencer activation and Tournament with over 1000 registrants



Zain Iraq: Participated in Iraq International Information & Telecommunication Technology Expo ITEX



Zain Bahrain: Conducted an open day for university students at the Zain esports Lab, Uni Jam.



PUBGM Influencer activation and Tournament with over 1000 registrants



Corporate Sustainability Achievements Leading to Value Creation

KEY ACCOMPLISHMENTS



Initiated and finalized plan for external audit (EY) for Reasonable Assurance Scope 1 and 2 emissions and Limited Assurance for the remaining indicators for the Zain's 2024 Sustainability Report making the company the only telecom in the region to have reasonable assurance.



Zain officially submitted its Science Based Targets to SBTi and awaiting final approvals.



Initiated compliance process for the Responsible Marketing and Communications Standard with the Group and Opcos business units (Commercial, Procurement, Human Resources) to ensure alignment and adherence to integrate responsible, transparent, and ethical communication practices.



Officially submitted to CDP Zain's disclosure on climate change which includes aspects on Water, Plastic, and Biodiversity



Officially submitted Zain's 2nd consecutive disclosure to the UN Global Compact indicating the company's alignment to the UNGC's principles on human rights, labor, environment and anti-corruption



Contracted Sustainability cloud solutions to standardize and automate data collection and efficiently manage all sustainability KPIs/indicators in preparation for the IFRS S1 and IFRS S2 Standard and address external auditor (EY) observations.



Achieved Leader position with a score 8.4/10 "The State of Children's Rights and Business 2024" benchmark, showcasing our commitment to leading in children's rights and business practices. Zain score is double the region's average



S&P Global Ratings

MSCI



A-
Leadership Position

53/100
Above Industry Average

BB
Within Industry Average

3.5 / 5
Above Industry Average

INCLUSION, DIVERSITY AND EQUITY

Our vision is to foster a fully inclusive and accessible workplace where every Zainer contributes to the collective success of our organization.



INCLUSION

- ✓ Through continuous measurement, collaboration with key stakeholders, and empowering Zain allies, we create a data-driven, equitable environment that fosters individual and organizational growth. Our vision serves as a guiding North Star, embedding inclusion into Zain's DNA and driving impactful change
- ✓ By enabling employees to shape their experiences, breaking down silos, and adopting a human-centric approach, we transform Zain's culture



WE ALIGN

- ✓ Business Alignment and Knowledge Exchange with Omantel visitors to Zain on Mental Health, People Experience, HR Core Pillars and SME Business Sales Platforms
- ✓ Conduct job training of 567 employees (youth) in various units
- ✓ Conducted 2 hackathons under the Tomorrow Technology Today (TTT) campaign with the themes of AI and CX targeting all levels



WE - Women Empowerment Initiative

- ✓ Women represent 14% of the overall leadership pool at Zain
- ✓ Three operations have achieved their women in leadership targets
 - Zain Jordan at 25%
 - ZainTECH at 27%
 - Zain Cash Jo at 25%
- ✓ 21% of employees received training tackling Inclusive Leadership, Inclusion Competencies, Microaggressions and Biases



BE WELL - Employee Wellness Initiative

- ✓ Implementing a Mental Health at Work Wellbeing Index (by One Mind) will provide a comprehensive score and insights, helping us measure progress, set benchmarks, and enhance wellness at Zain
- ✓ 648 employees benefited from free counseling sessions provided by the Kuwait Counseling Center (KCC), with a total of 669 sessions conducted
- ✓ Developing a joint Zain and Omantel Wellbeing Committee to leverage data on existing initiatives, identify key priority areas, and generate actionable insights to drive the BE WELL strategy with data-driven decisions



WE ABLE - Disability Inclusion Initiative

- ✓ A regional first: Zain Group partners with 'Be My Eyes' to provide accessibility assistance to people who are blind or have low vision
- ✓ Establishment of a comprehensive Sign Language Library
- ✓ Launching THE MASTERS, enabling our People with Disabilities to create, lead, and shape their experiences at Zain



ZY - Zain Youth Initiative

- ✓ Applications for the 'Gen Z' 2025 groundbreaking program have opened, marking a 10th anniversary milestone since its launch in 2016
- ✓ Launched ZY Counsels in each OPCO identifying high potential youth, providing them with exclusive trainings, and reporting directly to CEO's on strategic challenges
- ✓ Through various programs, 1,000+



IDEU - Inclusion, Diversity and Equity University Program

- ✓ Introduced an additional 1000 employees into the IE University Digital Transformation program
- ✓ To date, over 4,800 certificates have been earned, with more than 87,500 training hours completed



WINNING AWARDS

- ✓ Zain Group: Best Workplace for Women
- ✓ Zain Group: Championship Award in Women Empowerment
- ✓ Zain KSA - Ideal Workplace for Women

UNITY

Completed

In Progress

Next steps

Kuwait

- CX Scan
- Baseline - Channel & Journey Metrics
- Tiny Habits Launched
- Purpose Week

- Tiny Habits Experimentation
- Channels & Journey Redesign
- Personal Purpose Statement Workshops
- UNITY Human Culture Survey Round 2

- Tiny Habits Evaluation
- Channels & Journey Impact
- Purpose Diwaniya - Corporate Purpose Statement
- Contact Prevention Deep Dive

Iraq

- CX Scan
- Baseline - Customer Channel & Journey Metrics
- EX Onboarding Journey Workshops
- CEO Podcast Recorded

- Journey Workshops
- Channel & Journey Teams
- Communication Campaign
- Transformation Experts Learning

- Channels & Journey Redesign
- Tiny Habit Campaign
- Purpose Week Activation
- UNITY Diwaniya

Bahrain

- CX Scan
- Stakeholder Interviews
- UNITY Masterclass

- UNITY Survey
- Final Roadmap Agreement

- Journey Mapping
- Channel Surveys
- Purpose Week Activation
- UNITY Diwaniya

Jordan

Launched in
November

- Task Force Onboarding
- CX Scan
- UNITY Survey
- Stakeholder Interviews

- Complete Scan
- Create Roadmap
- Journey Mapping
- UNITY Diwaniya

Objectives

- Build a common standard of customer experience across our operations that sets Zain apart not only in the region, but globally.
- Define a clear purpose that resonates with all Zainers.
- Infuse Customer Experience into the DNA of every Zainer

2025-2029

Roadmap being developed in alignment with Strategy for UNITY 2025 onwards. The roadmap will include the various modules to be implemented groupwide as well as specific KPI's and Metrics to be tracked.

WHY ZAIN?

4SIGHT ... CLEAR STRATEGY

Clearly defined strategy with a strong focus on digital and enterprise, as well as new verticals moving away from traditional telco approach

5G LEADERSHIP

Largest 5G network footprint across region combined with strategic investments in technology and innovation driving new revenue streams

PROFITABILITY ACROSS OPERATIONS

Highly profitable operations across our footprint with a strong focus on unlocking potential for further growth and increase our shareholders value

UNLIMITED POTENTIAL OF KEY GCC MARKETS

Youth bulge driving data consumption, Enterprise & Government ICT needs, High GDP in several markets, huge govt projects driving economies, oil price improvements

TOWERCO BUSINESS MODEL

Unlocking capital from passive infrastructure to drive efficiencies and focus on core business

DIGITAL SERVICES

Continual rollout of dynamic new digital services driving customer acquisition and revenue streams





THANK YOU

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