Global trend > diminishing roaming revenues

Active roamers quantity is dropping; Roaming rates reducing drastically; GSM Roaming is moving away as the preferred mode of communication while away from the home country

Existing market condition
- Pre-pay customers have limited ability to recharge their accounts while away from the home country
- Visited countries have door-step availability of local SIM-cards.
- Dual SIM-cards phones give the required impetus to home/visited county SIM-cards support.
- Running out of credit while roaming
- Visited countries have easily accessible recharge options.

Opportunity
- To differentiate from the competition through introduction of meaningful, relevant and difficult to copy offer addressing real needs of Pre Pay roaming customers
- To deliver:
  - Effective roaming customer acquisition instrument
  - Effective roaming customer retention tool
  - Tool for encouraging roaming usage without the fear of low credit.

Why Recharge Everywhere?
- Ability to recharge PrePaid (Hybrid PostPaid) account with top-up cards/instruments available at thousands existing distribution points across visited countries in the consistent and easy-to-use format
- Addresses “real” customer need in the meaningful way
  - Stay connected in convenient (user friendly) way while travelling for business or pleasure.
  - Continues ability to receive calls on the home country phone-number even while away from home - the main USP of roaming
  - Enjoy effective/efficient recharge options available at customer’s desired vicinity.
- No more worries of running out of credit while roaming. No fear of losing scratch cards brought along while travelling.
- Major advantage in terms of Brand/market perception
Strategic fit to MNO

The introduction of Recharge Everywhere service offering is significant means of differentiation from the competition and fits perfectly in the following aspects:

1. As a part of the brand promise, it conveys a strong functional base for ongoing enhancement process – leadership in delivering *products meaningful and relevant to target market segments*

2. *Differentiates MNO from its competitors* by taking advantage of its presence and this partnership across continents in a very real & functional way

3. * Extends the initial service offering* to address customers roaming needs across continents

4. Generate *additional revenue stream* from enabled roaming services

**Expected return**

- Acquisition/retention of customers while away from home country
- Acquisition of visiting customers to utilize MNO services
- Not only sustains, but further enhances roaming revenue generated as a result of capturing bigger share of customer wallet
- Direct transactional revenue associated with each recharge
Customer Value Proposition

Convenient, simple, familiar, easily-accessible airtime recharge service at a click of a button

- Stay always connected to friends and family
- Carry forward the balance back home
- Recharge in local currency while roaming. Even cash is accepted
- Cost effective, easily assessable across thousands locations service
- Simple, familiar “territory” recharge process
Recharge Everywhere vs. Other Int’l Recharge Services

<table>
<thead>
<tr>
<th>Recharge Everywhere</th>
<th>Other Int’l Recharge Services</th>
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<tbody>
<tr>
<td>The service allows to recharge via scratch cards, POS terminal or EVD across thousands locations across visited countries.</td>
<td>The service allows access via limited availability of designated outlets, selected ATMs, kiosks, and web sites.</td>
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<td>Convenient &amp; familiar process as it gives customer access to recharge via scratch cards.</td>
<td>New customer behaviour and often cumbersome process as recharge is executed through automated kiosks or web sites.</td>
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<td>Easily visible at thousands of retail locations via partner OpCos</td>
<td>Due to the limited spread of point of sales, its difficult to identify/locate them.</td>
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<td>Affordable transaction fee</td>
<td>Exuberant transaction fee (up to 10% of recharge amount)</td>
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<td>Ability to pay with cash at all retail outlets selling scratch cards</td>
<td>Limited use of cash at the limited POS outlets and kiosks. Credit cards on the web-sites.</td>
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<tr>
<td>The scratch cards can be carried &amp; recharged if and when required.</td>
<td>The numbers are recharged instantly &amp; cant utilized for proxy buying.</td>
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Thank you