



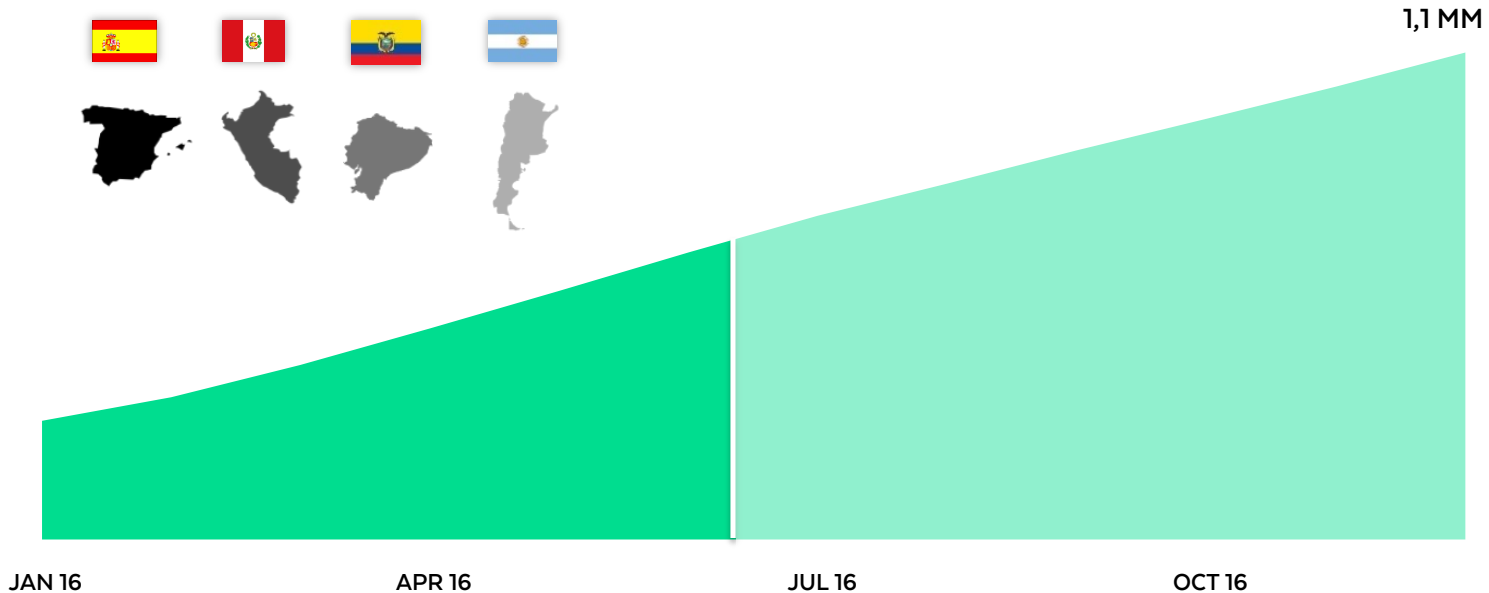
MVNO'S INTERNATIONALIZATION: TUENTI'S EXPERIENCE

Sebas Muriel (CEO TUENTI)

22/06/2016

Internationalization & digitalization

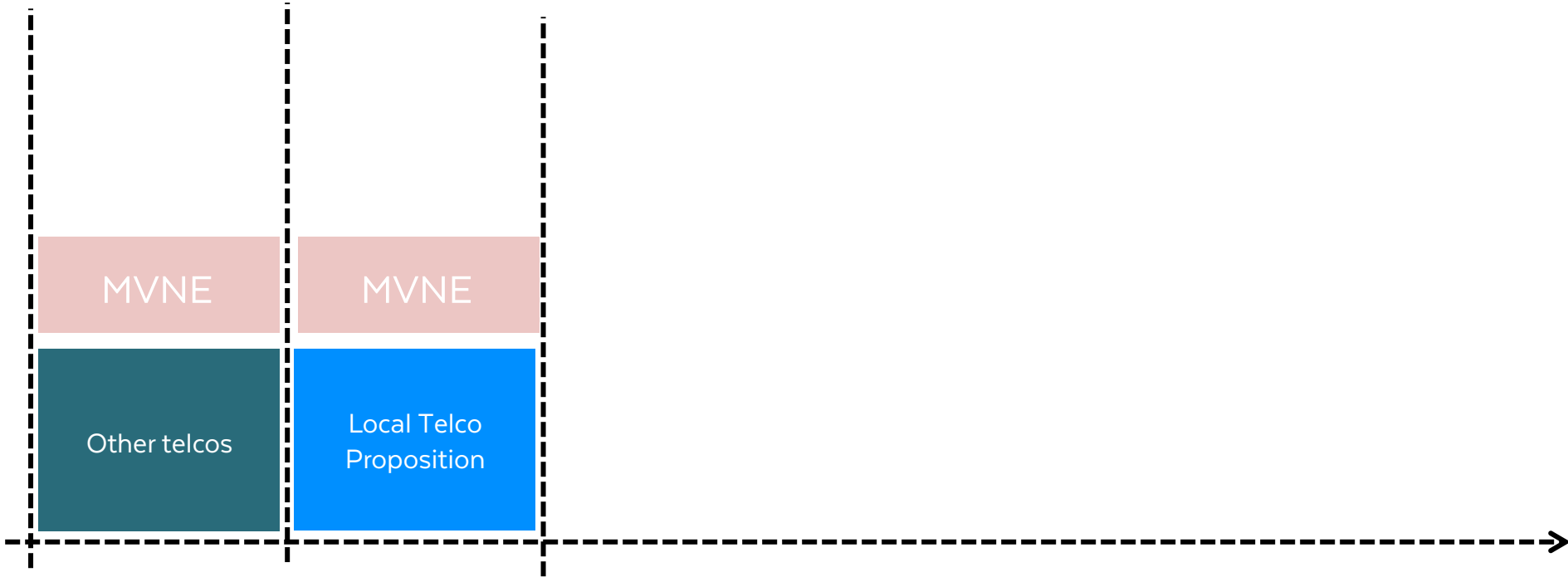
- We are growing the first global digital telco: we are currently operating in Spain, Ecuador, Perú and Argentina)



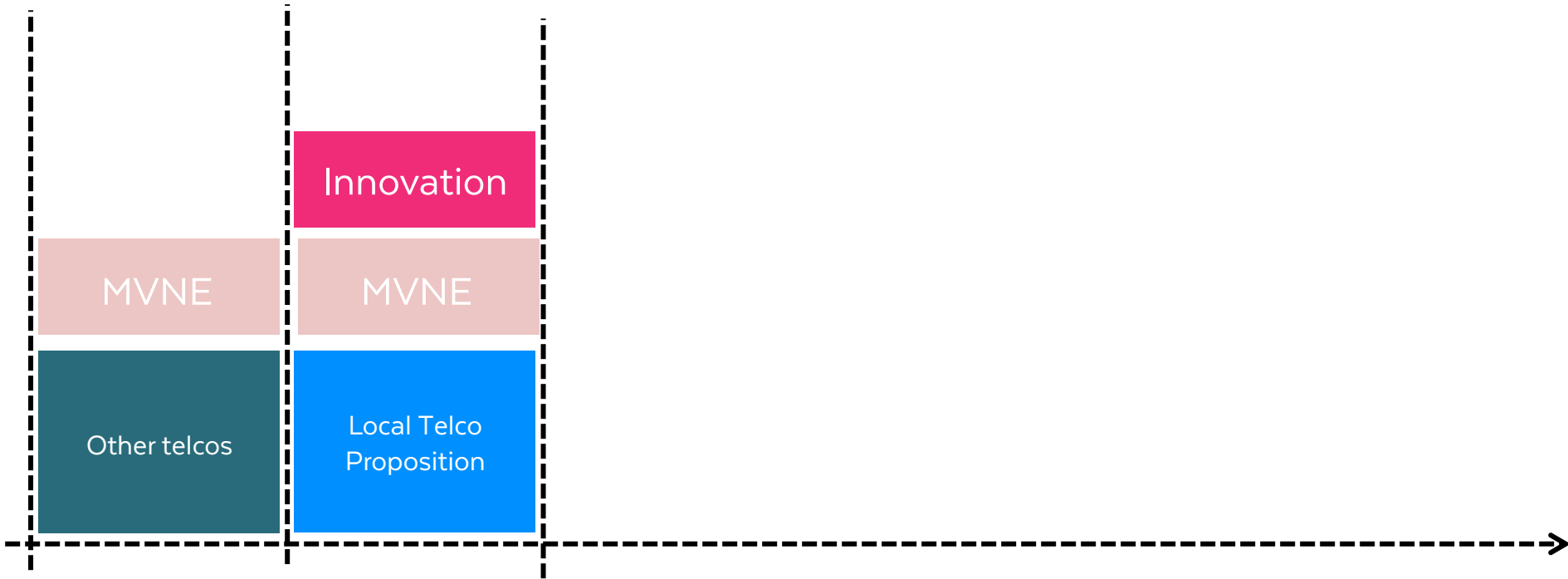
A global digital telco: the telco of the future

- We develop once and scale fast in order to gain critical mass rapidly and global reach.
- We benefit from economies of scale by leveraging the same top-notch OTT platform across all countries in which we operate.
- R&D made in our core can be distributed among several operations thus being more efficient and scalable.
- We not just offer differential digital services but we develop them as a truly digital company, by designing, launching, iterating and recurrently improving our products.
- Time-to-market is reduced drastically (we are launching a new country in Q4-2016, less than three months to go live with all features vs +1 year at the beginning).

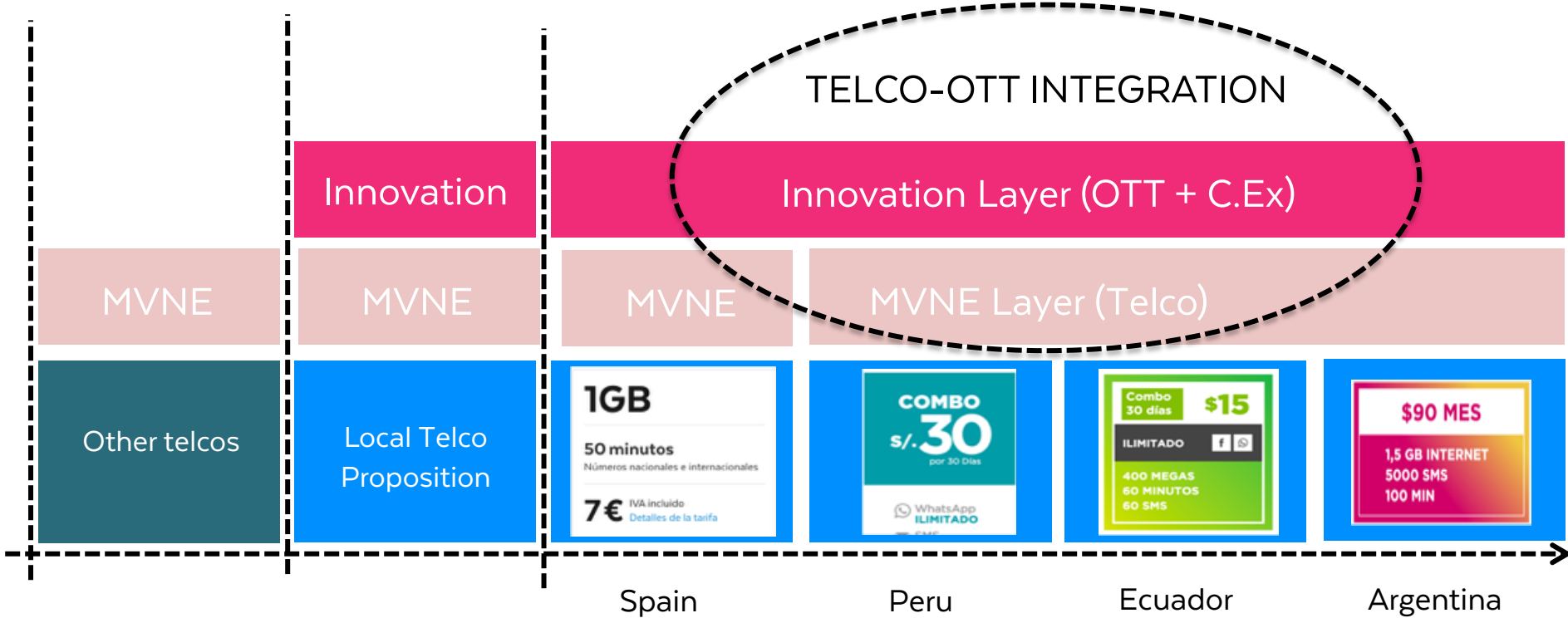
The path of the Telco-OTT business model



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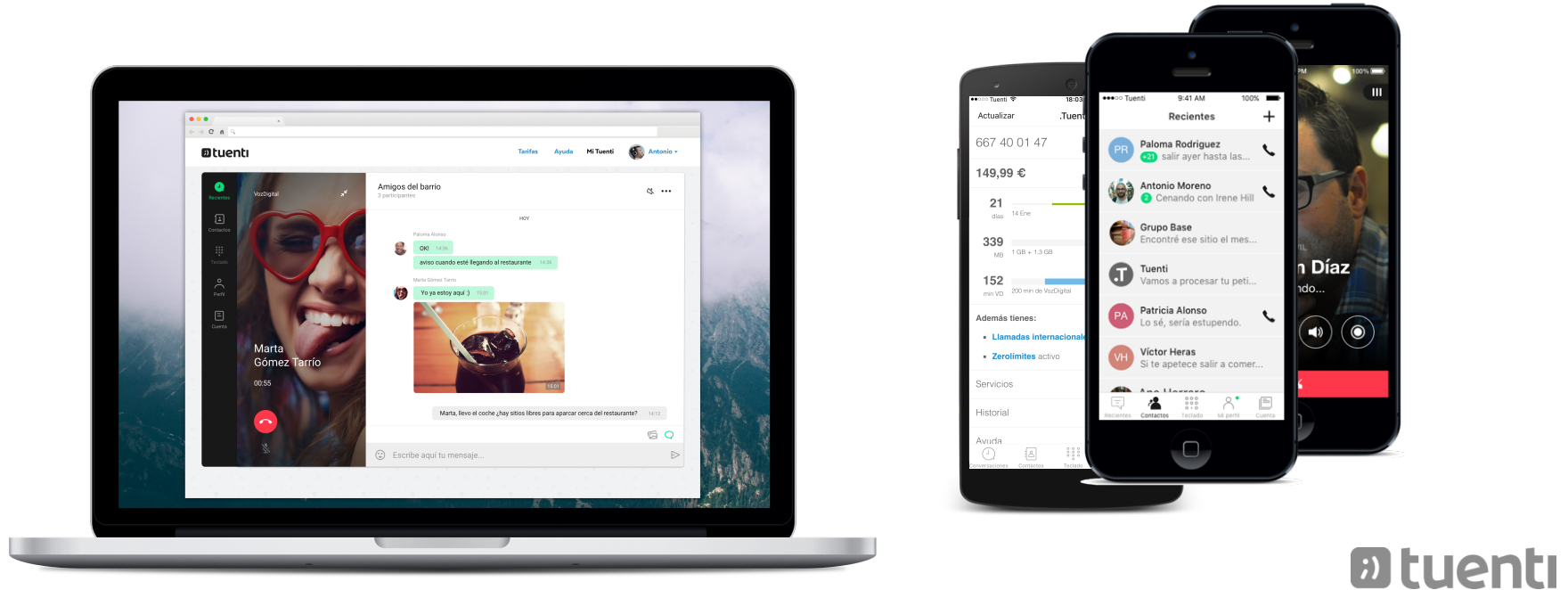


The path of the Telco-OTT business model

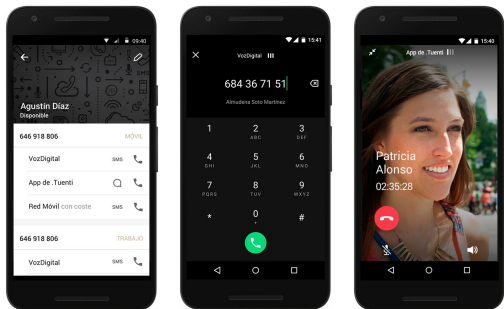


Innovating in the core of the Telco

- Tuenti provides an end-to-end digital experience through an OTT innovation layer (cloudphone, IP Comms, account mgmt & support chat), that increases customers' engagement with the brand.



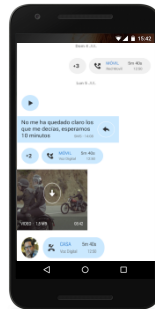
Tuenti: an innovation driven operator



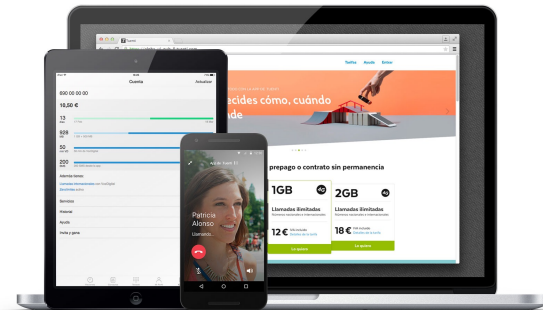
APP2APP & VOZDIGITAL



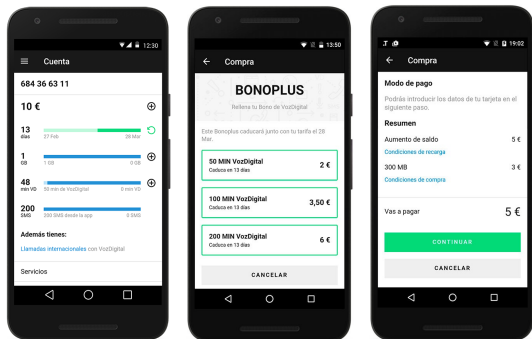
INCOMING CALLS



TELCO EVENTS



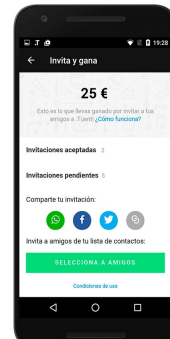
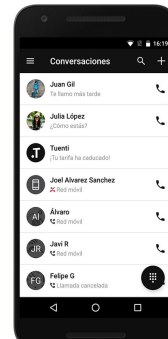
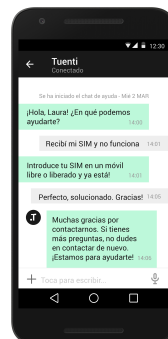
CLOUDPHONE, MULTIDEVICE



ACCOUNT MGMT, TOP-UP, IN-APP PAYMENTS



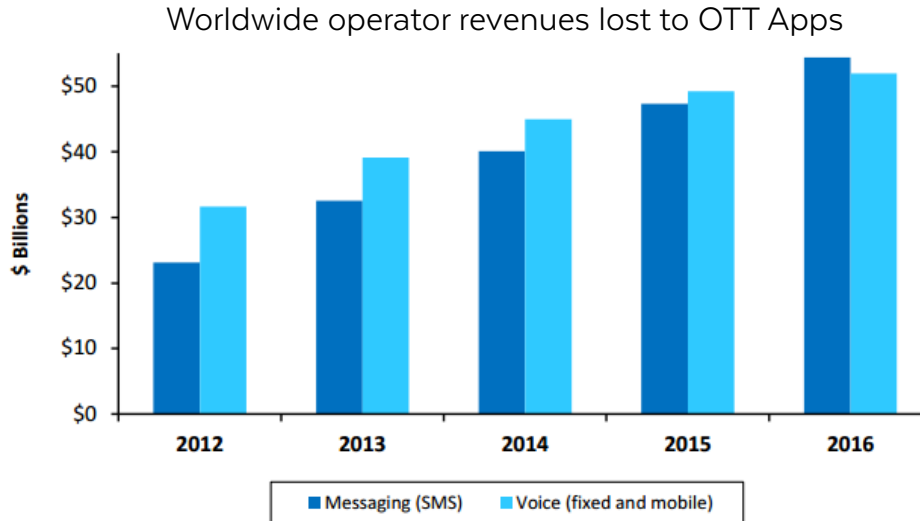
MR. TUENTI, CUSTOMER CARE CHAT



CLOUD CONTACTS & MGM

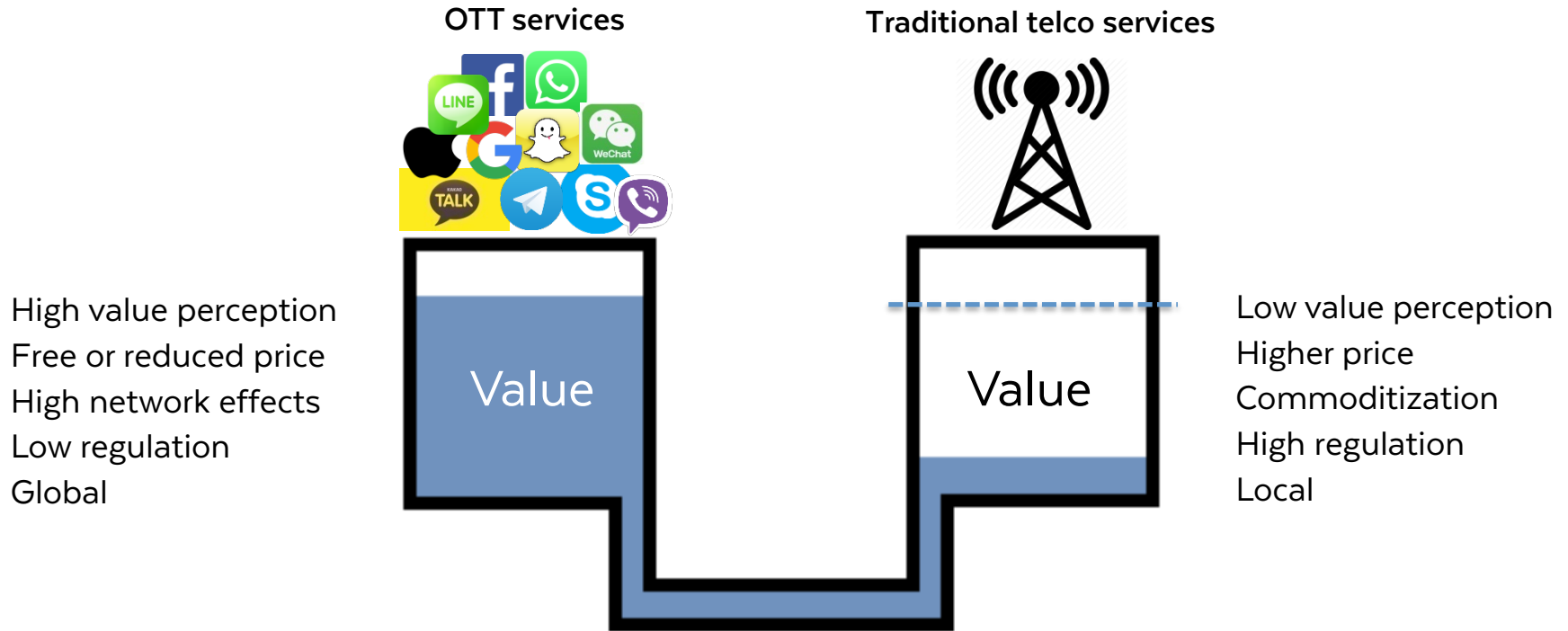
Why are we doing this on the OTT layer?

- Operators see OTTs (VoIP & messaging providers) as their fiercest competitors in 2016, scoring 4.02 on a scale of 1 to 5 (source: OPENET)
- OTT Apps are putting Operators' revenues under pressure & risk



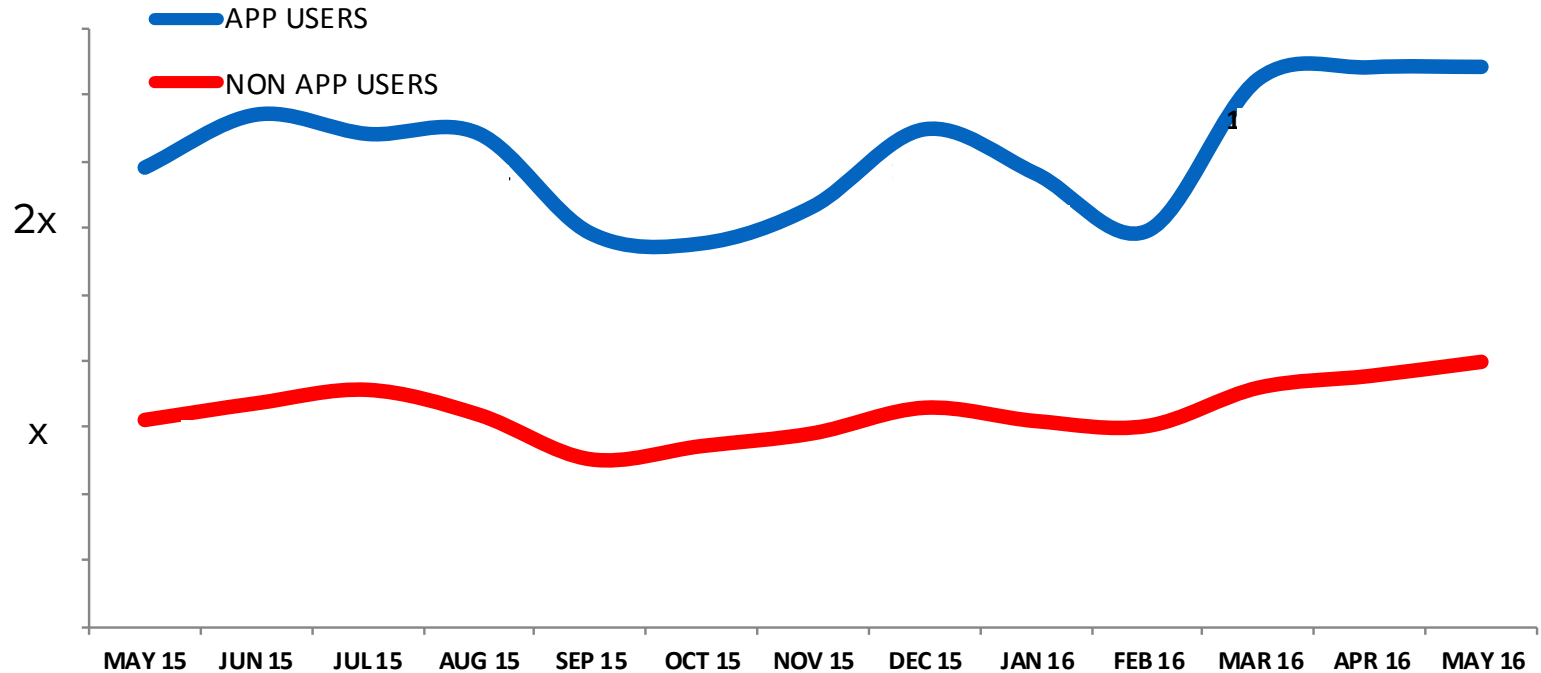
Source: Ovum, Cartesian

Value is there, ...but it is moving away



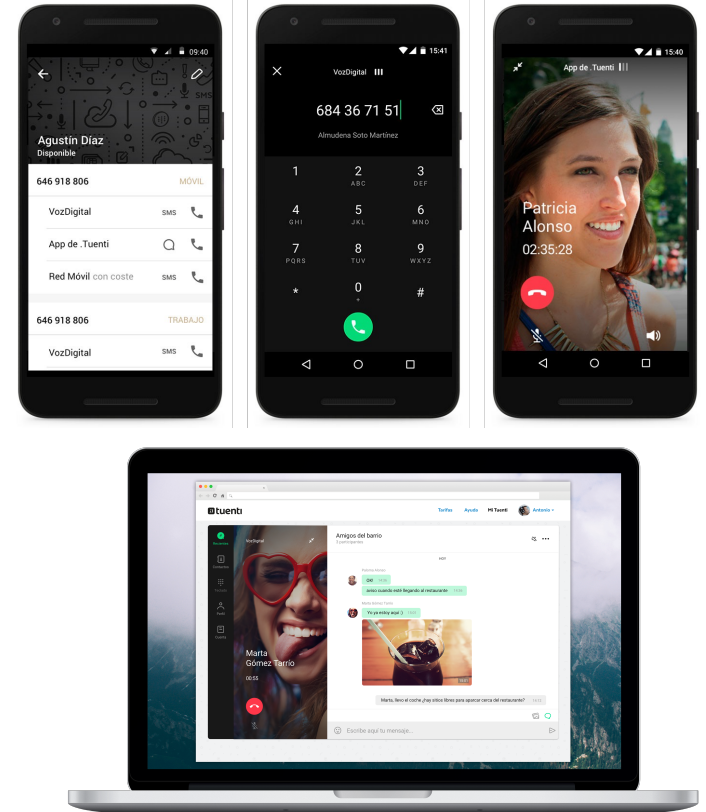
Customer value

Digital product usage increases Customer Value (better churn & higher ARPU)



Summary

- Higher engagement results not only in better customer satisfaction, but also higher customer value (better churn and ARPU)
- Levering our platform and own OTT IP comms technology is allowing us to grow faster in different markets
- Design, launch, learn, improve, iterate



 **tuenti**