



March 25, 2022

National Stock Exchange of India Limited

Exchange Plaza, C-1 Block G
Bandra Kurla Complex, Bandra (E)
Mumbai – 400051, India

Symbol: BHARTIARTL/ AIRTELPP

BSE Limited

Phiroze Jeejeebhoy Towers
Dalal Street, Mumbai – 400001, India
Scrip Code: 532454/ 890157

Sub: Investor & Analyst Participation

Dear Sir/ Ma'am,

Further to our intimation dated March 23, 2022 and pursuant to Regulation 30 of the SEBI (Listing Obligations and Disclosure Requirements), Regulations, 2015, we are enclosing herewith the presentation made by the Company at 'Investor & Analyst Day 2022' on Friday, March 25, 2022.

Kindly take the same on record.

Thanking you,
Sincerely Yours,

For Bharti Airtel Limited

Rohit Krishan Puri
Dy. Company Secretary & Compliance Officer





Date: 25th March 2022

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Who are we



The opportunity



Our strategy

Who are we?



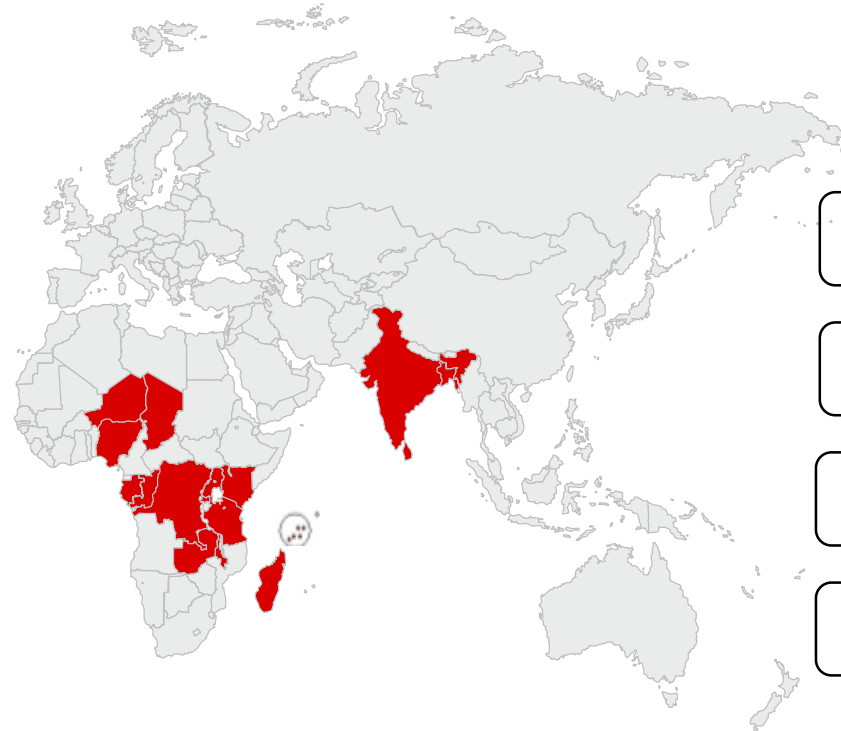
International

14 countries in Africa, **2** in South Asia

180 Mn+ Customers

1.8 Mn+ Retail Touch points in Africa

\$65 Bn+ Airtel Money[#] Transaction Value



India

~323 Mn Mobile Customers, **22 Mn+** Homes

184 Mn MAUs on Digital Assets

3500+ Enterprises

1M+ offices

Who are we?



International

India



Revenue (Cr) 119K

14 countries in Africa, **2** in South Asia

180 Mn+ Customers

1.8 Mn+ Retail Touch points in Africa

\$65 Bn+ Airtel Money# Transaction Value



EBITDA Margin 49.9%

~323 Mn Mobile Customers, **22 Mn+** Homes

184 Mn MAUs on Digital Assets



Net Debt/EBITDA 2.67

3500+ Enterprises

1M+ offices



Operating Cash (Cr) 35K

Who are we?

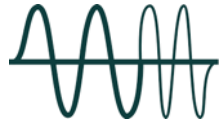
Massive amount of heavy lifting in terms of capital investments done



260.4K Towers



11 Data Centers and **120** Edge DCs



1.2 Lakh Crore of Spectrum Investment*



7 Sub Marine Cables



400K+ RKms of Domestic Fiber



365K+ RKms Global Fiber Network

Towers for India, SA & Africa

Domestic Fibre for India (as of Dec 2021) & Africa (as of March 2021)

*Spectrum Investments for India
Global Fiber Network includes IRU

Who are we?

Assets that can be monetized to lighten the balance sheet



Indus Towers: Largest TowerCo in India



1.8L+ Towers | **\$8.9B** Mcap | **41.7%** Stake

Fiber Assets: 400K+ RKms of Fiber



Nxtra: Largest Data Center network in India



Already valued at **\$1.2B** | **75%** Stake

ROBI Axiata: 2nd largest operator in Bangladesh

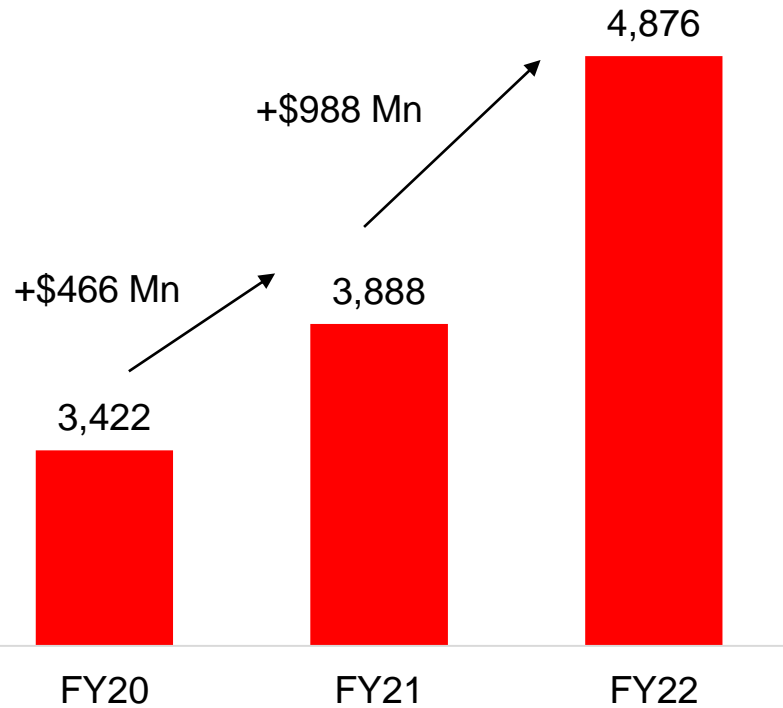


Stake valued at **\$0.6B**#

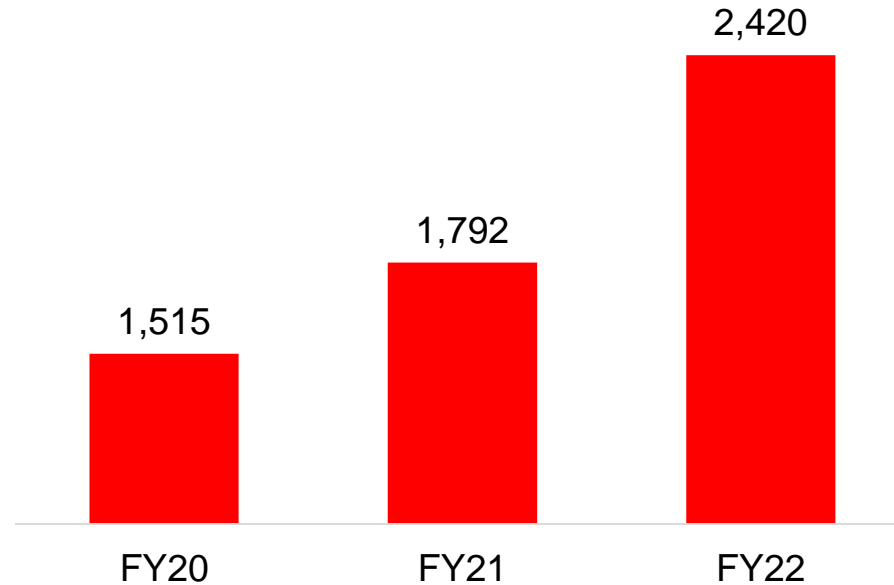
Airtel Africa performance in the last few years



Total Revenue (\$ USD Mn)



EBITDA (\$ USD Mn)



EBITDA %: 44.3% 46.1% 49.6%

#1 / #2

in 12 markets*

Financials are basis reported currency published results
FY22 is Q3FY22 annualized revenue & EBITDA assuming business stays as-is

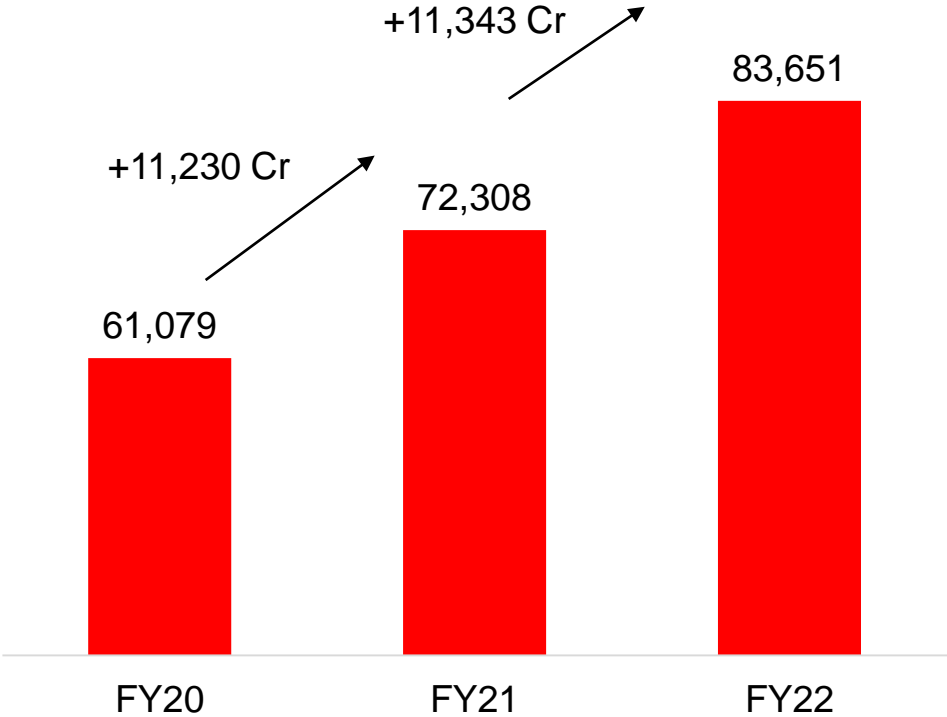
Numbers above are extrapolated based on reported financials and should not be read as any sort of guidance

*Based on customer market share

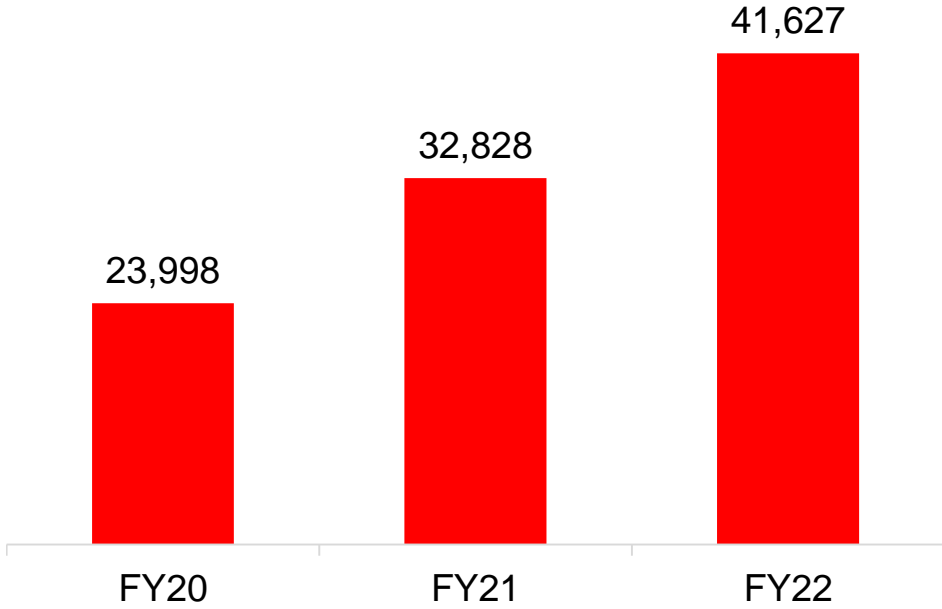
Airtel India performance in the recent past



Total Revenue (Rs. Crore)



EBITDA (Rs. Crore)



EBITDA %: 39.3 % 45.4% 49.8%

Financials are for India, as per Quarterly reporting
FY22 is Q3FY22 annualized revenue & EBITDA assuming business stays as-is

Numbers above are extrapolated based on reported financials and should not be read as any sort of guidance

Airtel India performance in the recent past



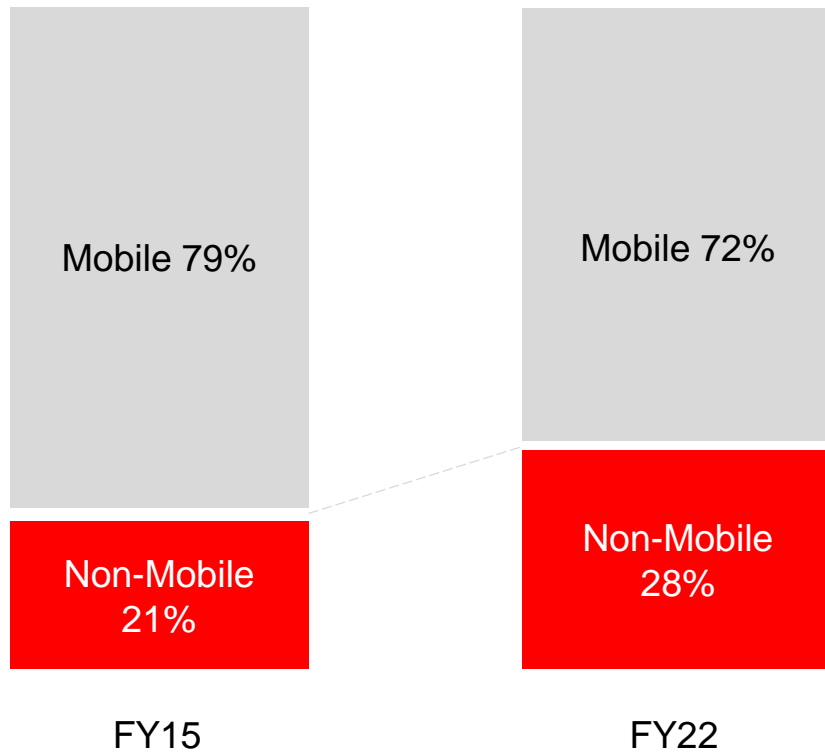
35.4% lifetime high Revenue Market Share

Postpaid **#1**

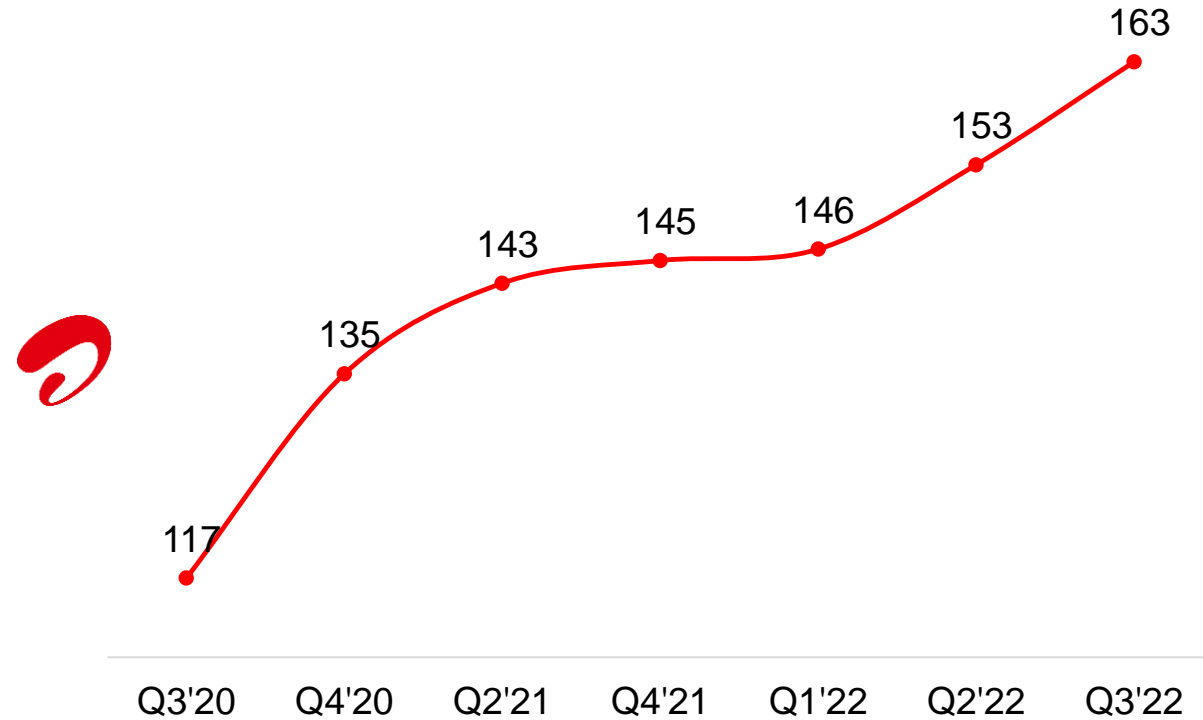
Relentless focus on best quality customers



Increasingly diversified portfolio



Highest industry ARPU (Rs) – ~40% gain in 2 years

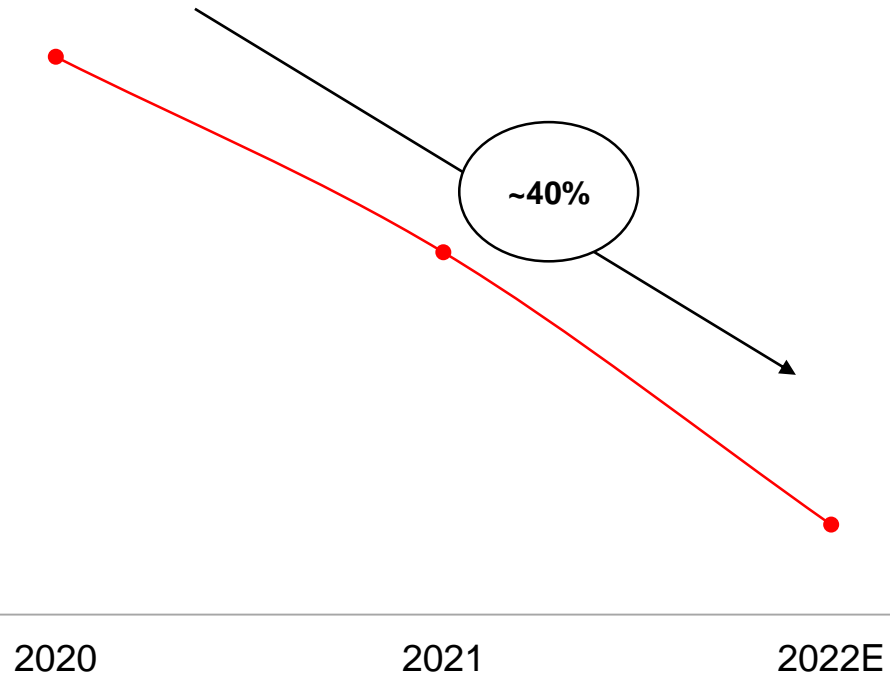


ARPU (Rs INR) for Airtel IS recasted for termination revenue which have been reduced to 0 from Q4'21

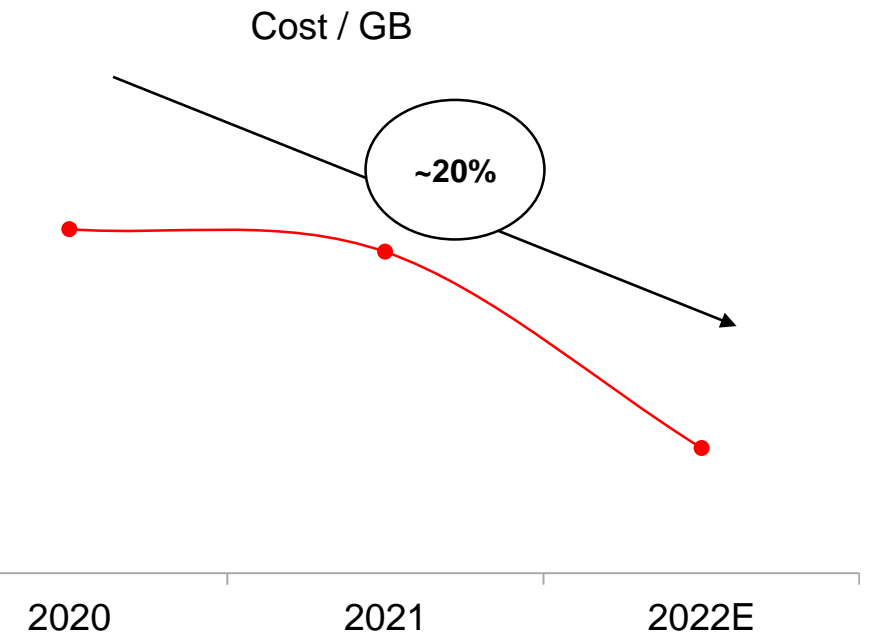
Driven by obsession with experience



~40% reduction in Complaints



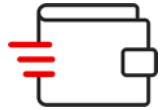
Delivered at the least cost



Built strong digital assets : Airtel Payments Bank



Fast Growing and with scale



122 Mn+ Customers*

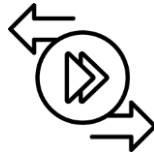


Rs 370+ Bn GMV# per Quarter



1 Bn+ Transactions / Quarter

Unique Capabilities



Real-time scalable payments infrastructure



Billion dollars of cash handling/month



Largest Banking Network (8 Mn+ Merchants)

Powerful Impact



Telco Churn reduced by **65%**



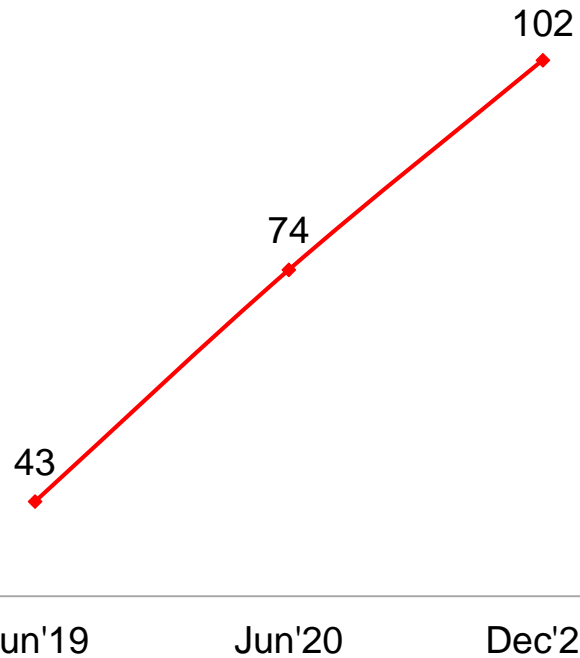
Broke even in **July'21**

*Customers - Unique Savings Bank, Wallet and platform users in Airtel Payments Bank records, identified by mobile number
#GMV - Value of transactions with merchants, remittances, collections, payments, withdrawals etc through our payment solutions.

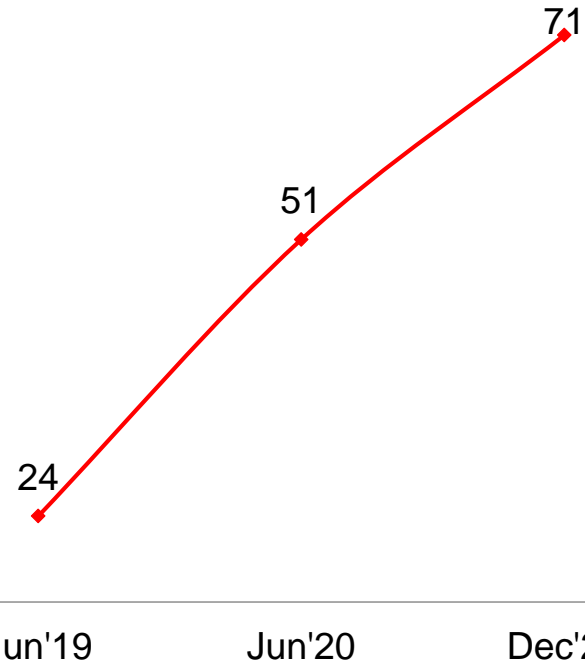
Built strong digital assets : Lifestyle and Entertainment



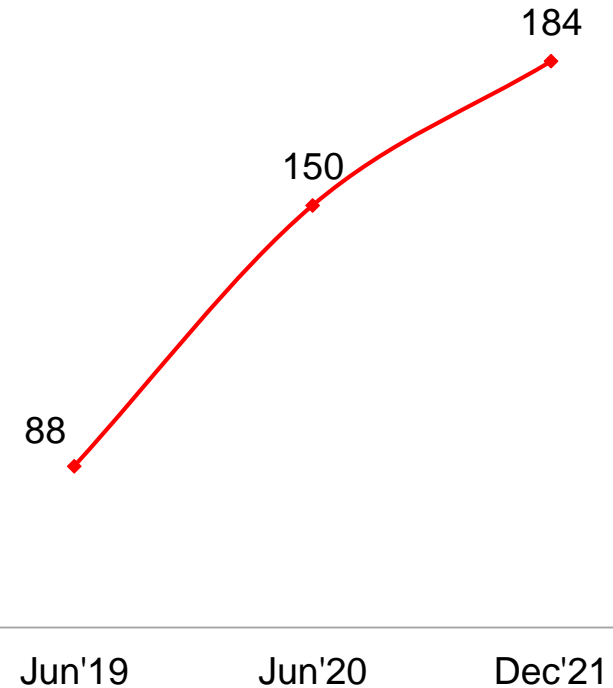
Airtel Thanks (Mn MAU)



Wynk (Mn MAU)



Total Digital users (Mn MAU)



*All figures in Mn

All done with a frugal mindset

Rigorous measurement



SITE LEVEL
MONITORING



STRINGENT INVESTMENT
MONITORING



CONTROLS AND
COMPLIANCE



STRICT ADHERENCE TO
REGULATIONS

Waste elimination



Sweat assets, drive synergies, digitize processes



Stripped 1.5B\$ of waste
in last 5 years



Who are we



The opportunity



Our strategy

Industry structure

Mobile



Massive industry consolidation

8
players



4
players

Airtel is competitively
well placed

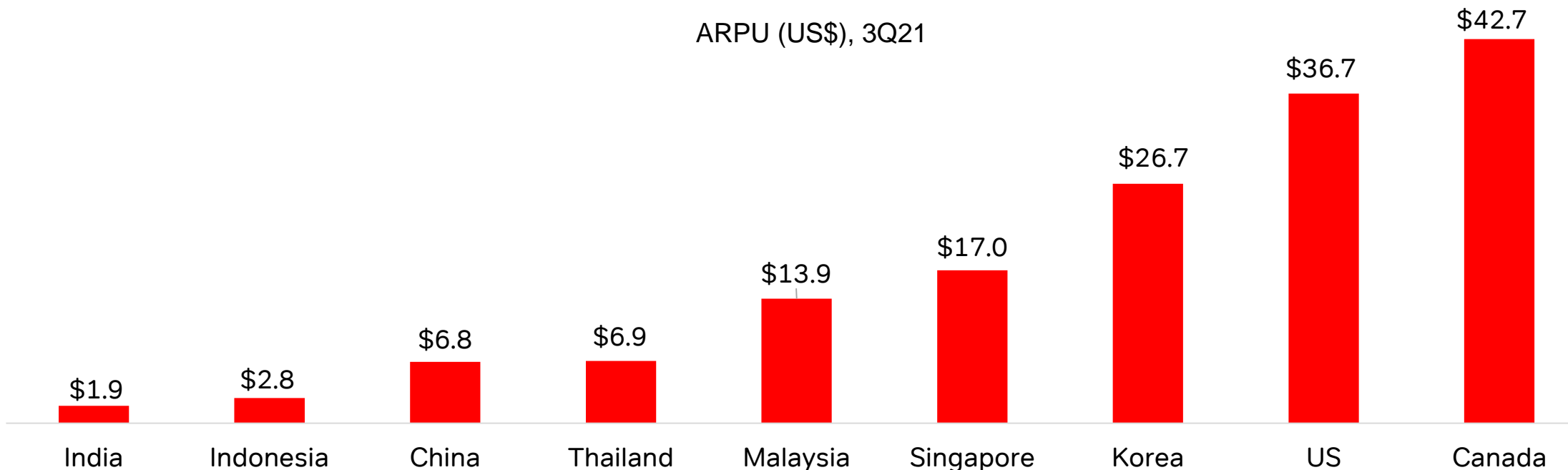
Opportunity

Mobile – ARPU opportunity



Lowest prices in India (compared to global benchmarks)

ARPU (US\$), 3Q21



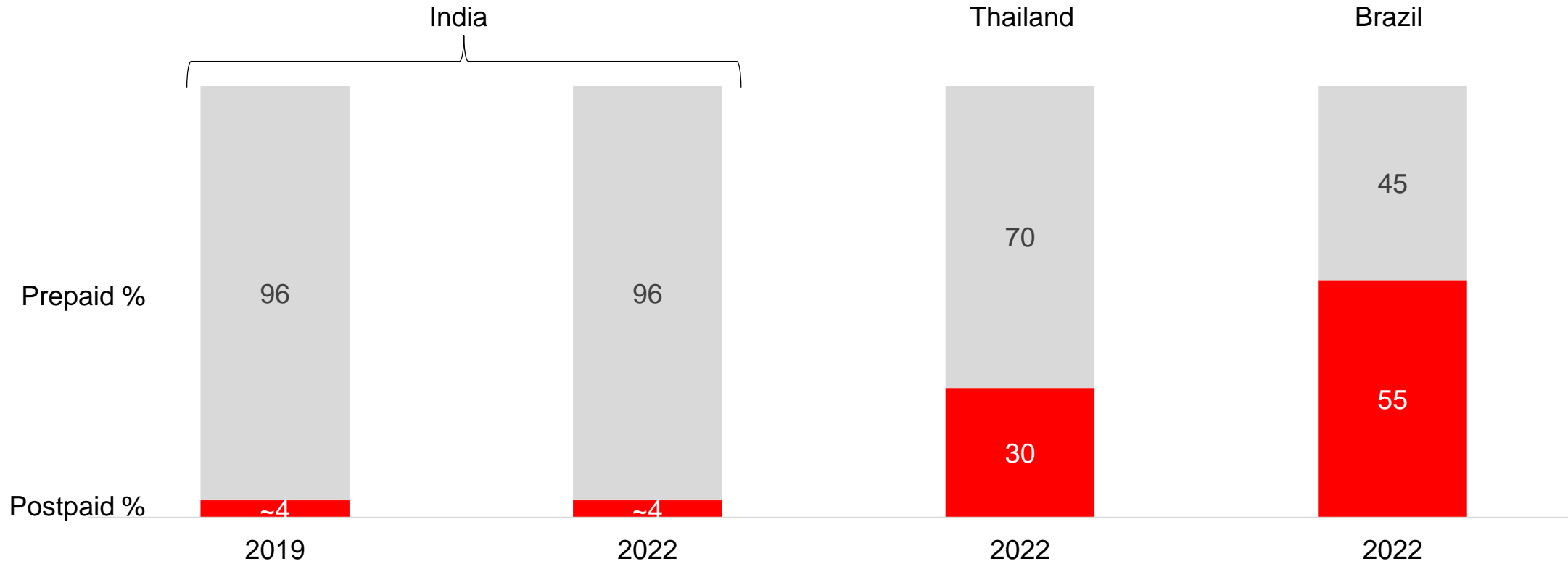
- ~\$2 ARPU : 6% ROCE. ~\$3.3 ARPU : ~**20% ROCE.** 33,000 Crore Incremental Revenue. 28,000 Crore Incremental EBITDA

Opportunity

Mobile – Postpaid opportunity



Current contribution



*Based on Global Wireless Matrix report by BofA

Opportunity

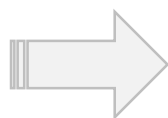
Mobile – Upgrades



200 Million Upgrades by FY 26

350 Mn Feature Phones

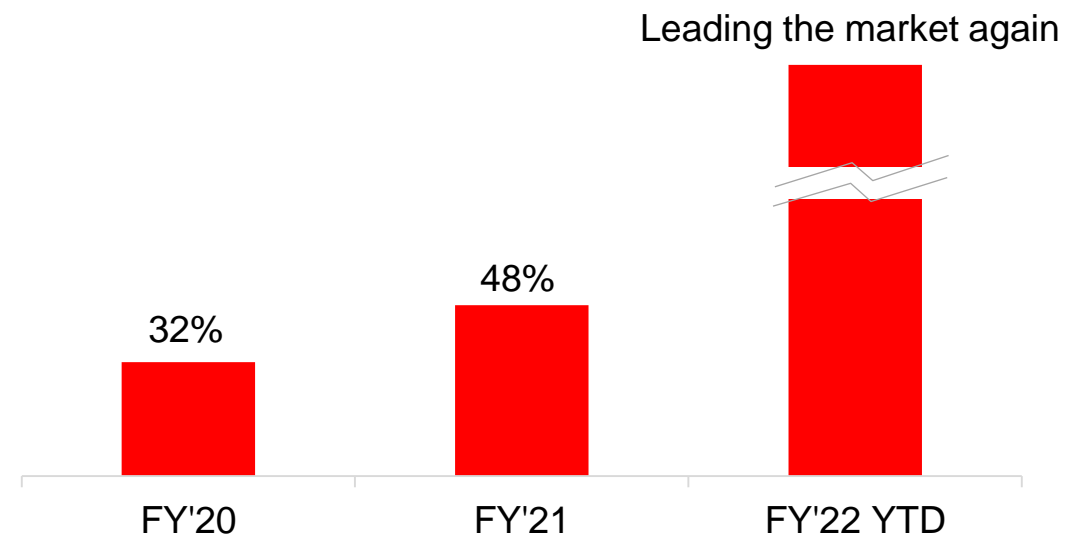
550 Mn Smartphones



40 Mn upgrades/year

Proven track record of accelerating share gain

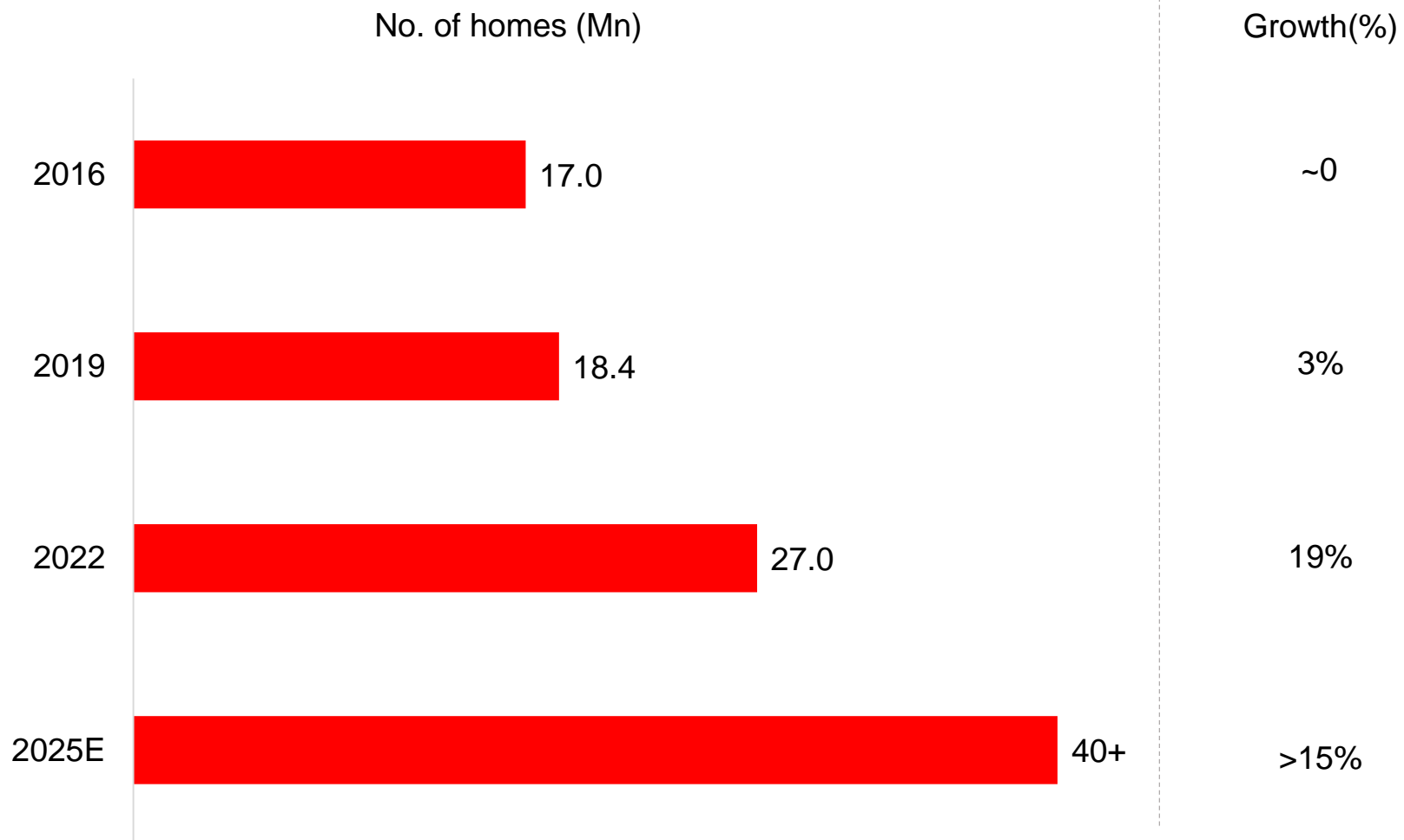
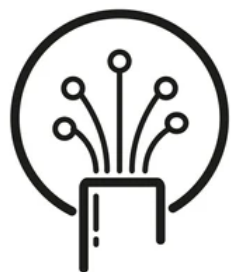
Share of Industry 4G Net Adds



*Based on reported figures by 3 private operators

Opportunity

Homes - Broadband market exploding



50 Million High Value Homes



Airtel already present in 2 of 3 homes

+ 1 Service

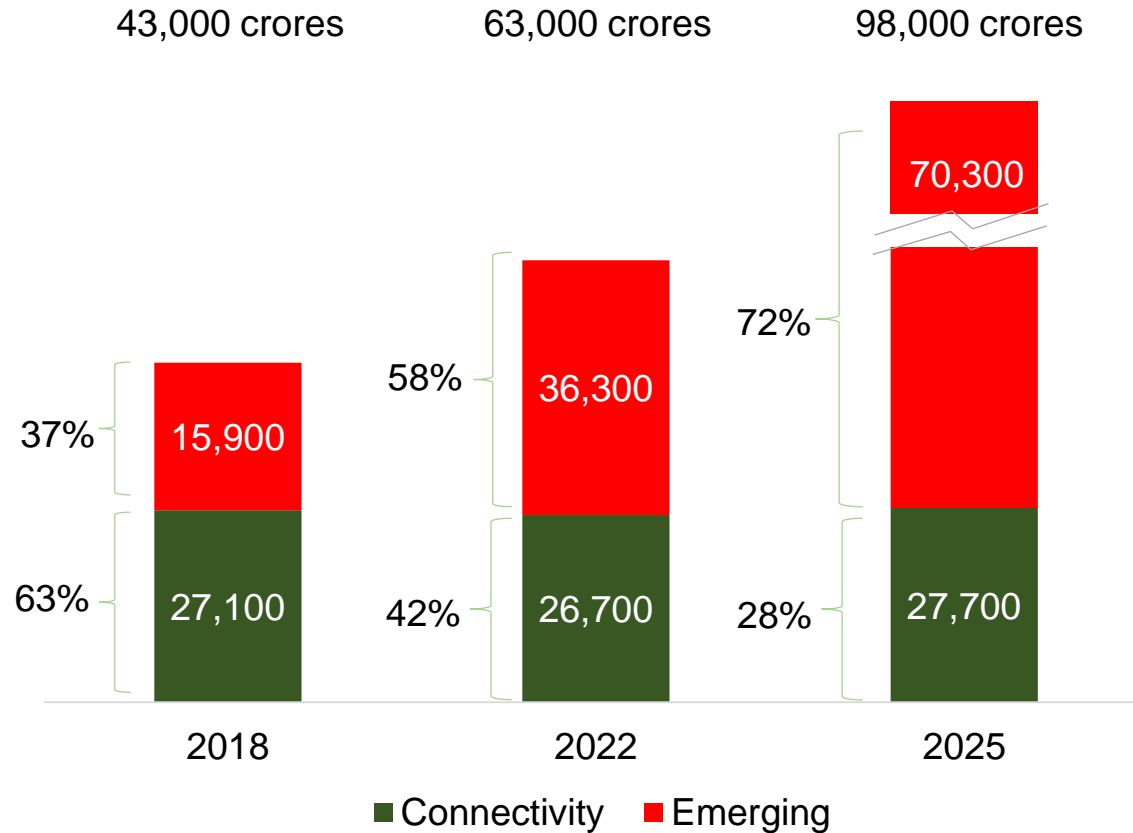
Rs. 650 incremental ARPA

Opportunity

B-B – Market changing dramatically



Emerging categories now accelerating



But margin profiles vary

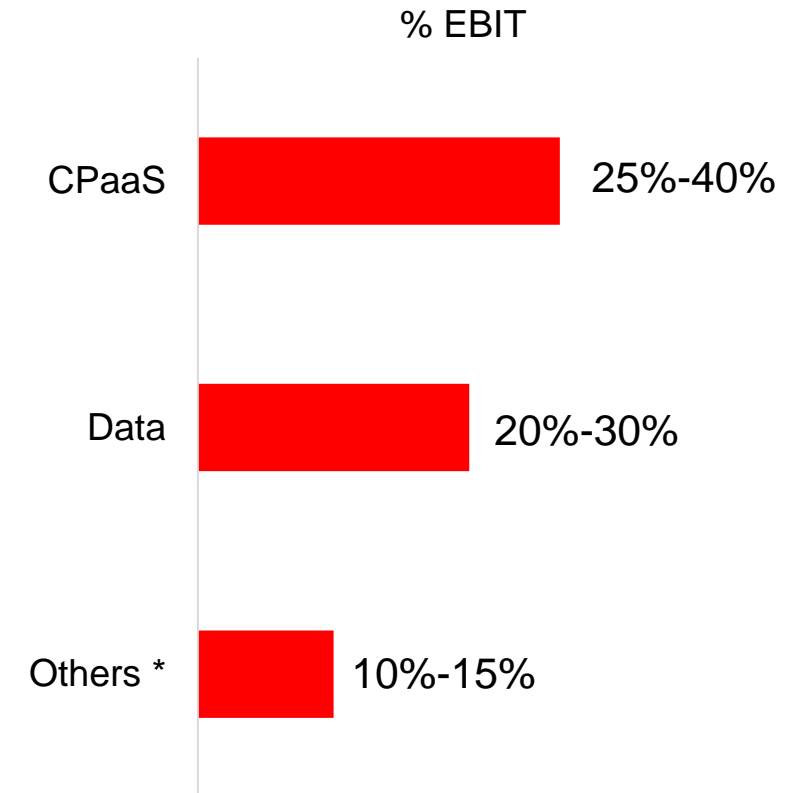


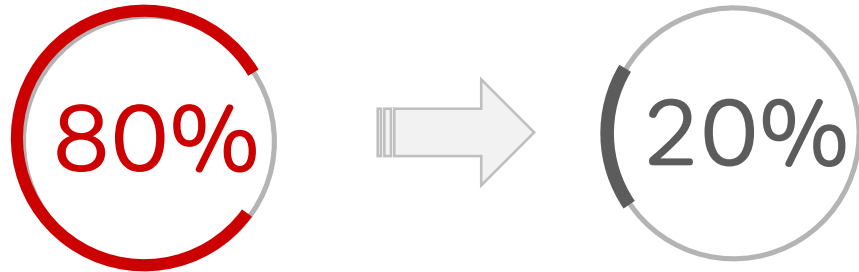
Chart based on typical industry margins
* Others include security & cloud

Opportunity

B-B – We can go both wide and deep



Opportunity to go wider



Enterprise and SMB customers

Revenue

Proven track record

~32% Lifetime high market share





Who are we



The opportunity



Our strategy



Our strategy



Quality customers

B2B - Expansion



Revamped go-to-market

Scale adjacencies

From

To

Farming

Hunting and Farming

Channel Led

Insourced

Diffused accountability

Catchment Ownership

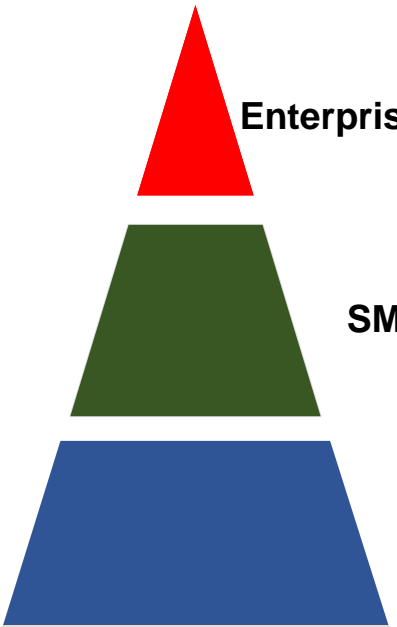


Leverage access and relationships



Create preferred partnerships

Ubiquitous connectivity



Enterprise

SME

SOHO

Quality customers

Broadband – Land grab

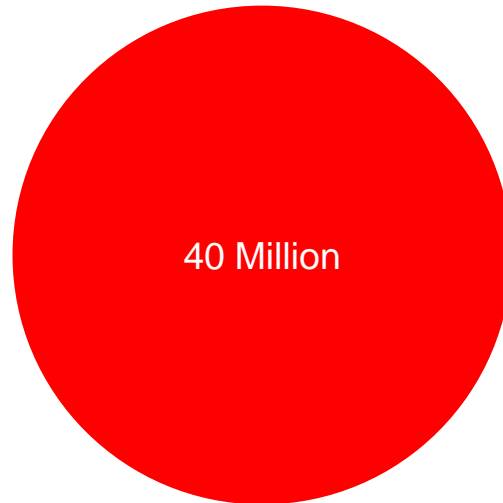
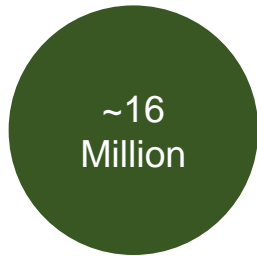


Expansion of home passes

Two proven models

Now

FY2025



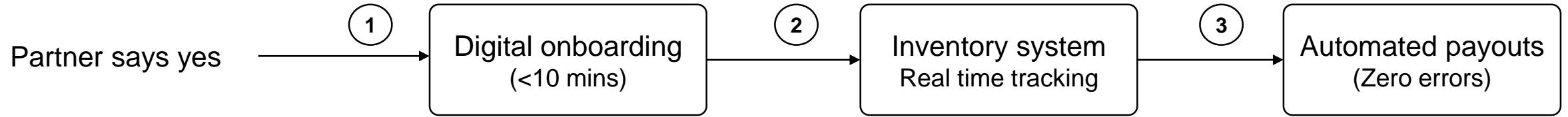
Own city model



Local Cable Operator model

Quality customers

Broadband – The Local Cable Operator model



Schedule - D

12-11-2021 The undersigned acknowledges that it has an agreement with Bharti Airtel Services Limited

Bharti Airtel Limited
Airtel Center
Plot No. 16, Udyog Vihar
Phase IV
Gurgaon - 122015

Subject: Authorization to Bharti Airtel Limited ('Airtel') for disbursement of payments, from the amounts payable to the Service Provider, on behalf of the Service Provider.

The undersigned acknowledges that it has an agreement with Bharti Airtel Services Limited ('BASL'), dated 12-11-2021 for purchase of certain last mile telecom infrastructure material and equipment ('Asset Agreement').

That under the said Asset Agreement, the undersigned has procured certain material and equipment (collectively, 'Equipment') from BASL (a subsidiary of Airtel) and has opted for deferral payment option as envisaged under the Asset Agreement.

That the undersigned agrees to make the payments due under the Asset Agreement through the amounts payable to the undersigned under the Distribution Agreement dated +12-11-2021+ executed between LCO and Airtel.

For Airtel
[Signature]
[Name]
[Title]
Date: Fri Nov 12 15:28:49 IST 2021

Order number	Order Date	Invoice Number	Order Status	Order Acknowledgement
LC00420009_994_4	24 Jan 22 16:41	AR65292284	Delivered	Jan 8, 2022
LC00420009_994_4	24 Jan 22 16:41	AR65292284	Delivered	Not Received Jan 8, 2022 16:04

Plan Details	Active Base	Revenue (₹)	Payout (₹)
999	88	56424	17491
499	186	68362	21192
799	252	134091	41568
1499	10	6662	2065
0	2	0	0
Plan Details Total	538	265539	82316

Variable Details	Total
Gross Fault Rate	2655
Sla Compliance	0
Subscriber Renewal Rate	0
Installation Conversion	0
Variable Details Total	2655

Gross Total = Plan Details Total + Variable Details Total	84971
Payout for the Month = Gross Total + Penalty for the Month Total	84971
GST 18%	15294.78
Total	100265.78

Quality customers

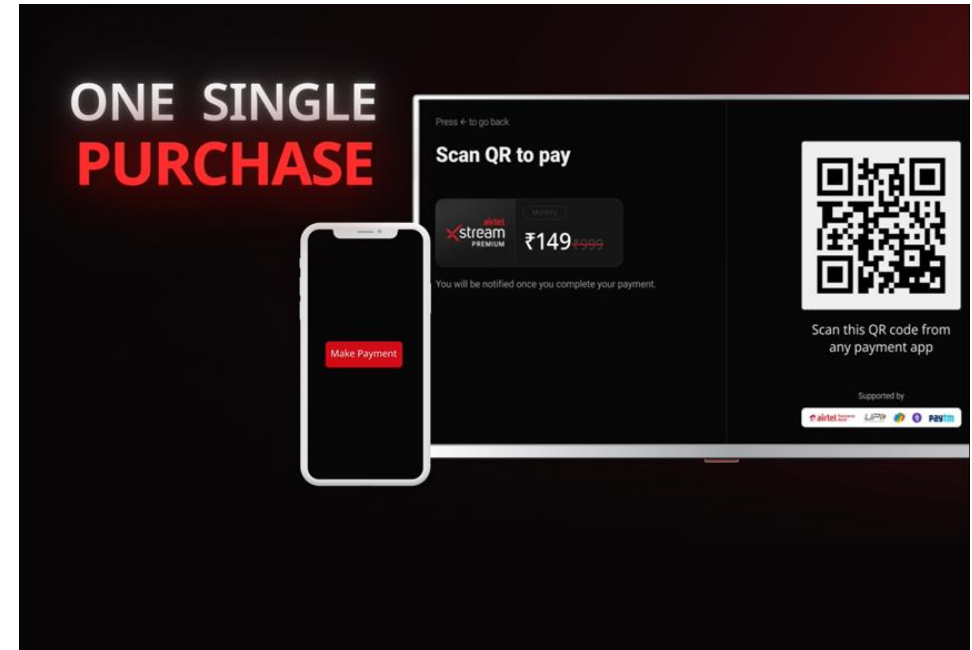
Entertainment key thrust area



Largest content aggregation; Single sign on



Seamless customer journeys



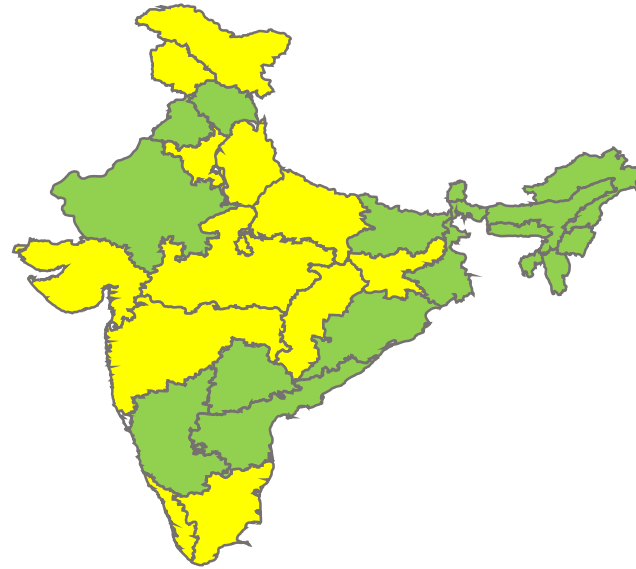
Quality customers

Mobile – Expansion



2021

2022



Network Towers

208,606

230,562



Circles with Sub-Ghz

10 Circles

All 22 circles

Quality customers

Differentiation



Propositions

airtel 4G **airtel Payments Bank**

NOT JUST A SIM, NOW CHOOSE A BANKING SIM

Open your bank account in just 5 minutes

Withdraw and deposit money at your nearby shop

75 lakh worth free accident insurance

Recharge and avail cashbacks

4G data and unlimited calling

airtel BLACK

Introducing Airtel Black.

Mobile. DTH. Fiber. All in one plan.

Ask us now

For terms & conditions, visit airtelblack.ttc

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Get ₹6000 cashback on your first smartphone

Free screen replacement for 1 year

Recharge with ₹249 and above

Unlimited calling and 1.5 GB data/day

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THE SAFEST WAY TO PAY

₹ AIRTEL SAFE PAY

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Aspirational brand

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One year of Amazon Prime with #airtelThanks

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ONE FAMILY ONE INTERNET PACK

Call 50005

INDIA'S BEST VIDEO EXPERIENCE ONLY ON AIRTEL.

airtel 4G **airtel 4G**

FREE MUSIC, MOVIES AND GAMES

airtel.in/free

Airtel Next Gen Stores

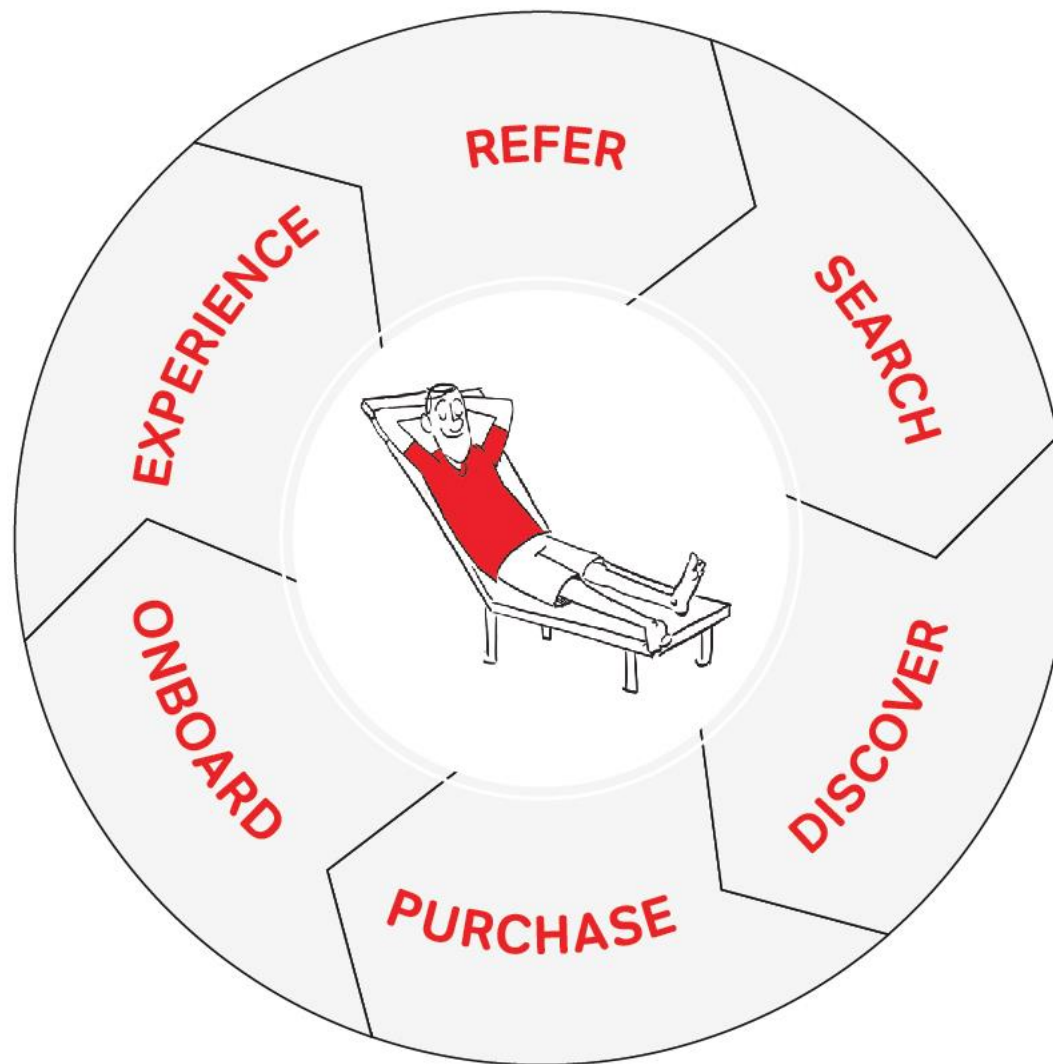
It's Official! INDIA'S BEST VIDEO EXPERIENCE



Our strategy



Our Omni Channel Experience Flywheel



Omni Channel Experience

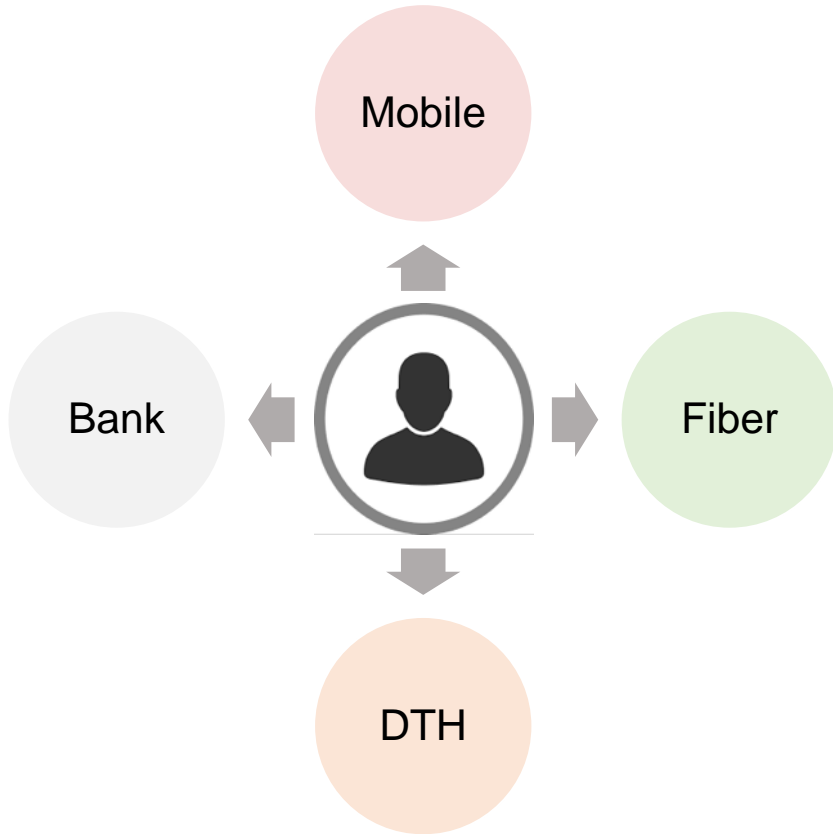
One view of the customer



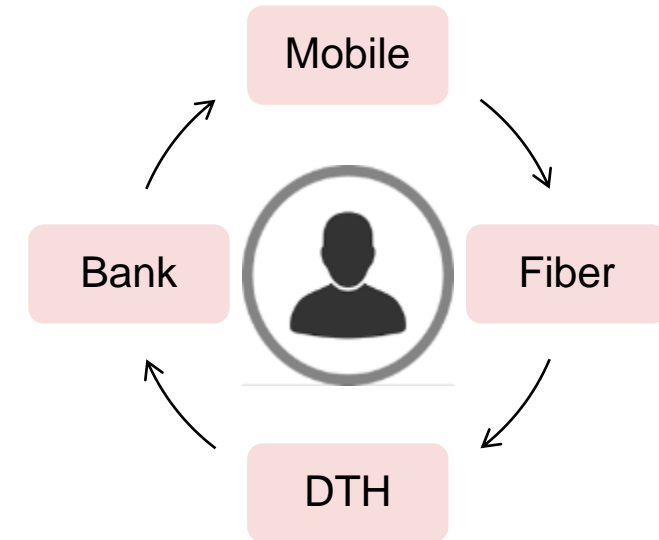
SEARCH

DISCOVER

From: A business specific Customer View



To: 'One Airtel' view of the customer



One CLM. One Experience. Omni Channel



Data science powered segmentation

Omni Channel experience

One view of our Go to market



PURCHASE

ONBOARD

From: A Business specific go-to-market

To: A One Airtel go-to-market



Traditional Trade



Traditional Trade. Modern Trade



RWA

Broadband Direct sales channel



STORES

Serves Customers in the Catchment



B2B

Combination of Own/Partner led model



Digital channel



Integrated Mass Retail channel



Direct to Consumer channel



B2B Channel : Own sales model

Brilliant experience

Network experience

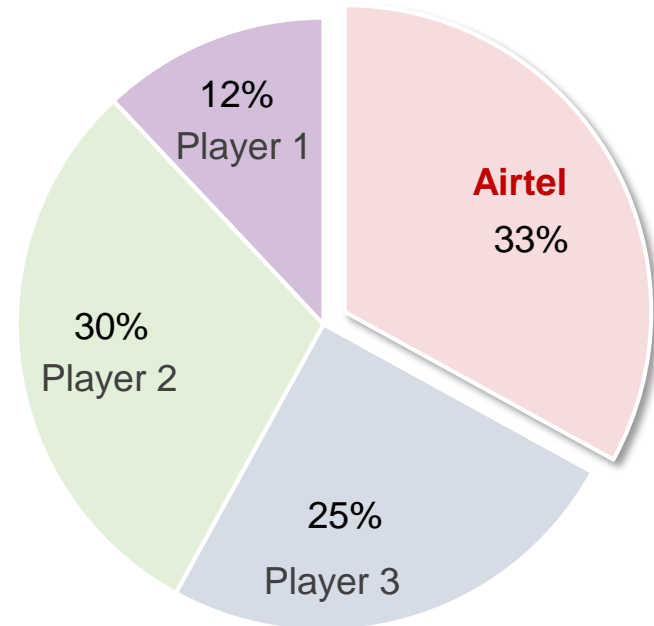


EXPERIENCE REFER

Our Spectrum

<u>Band</u>	<u>Footprint</u>	<u>Holding per Circle</u>
Low Band	Pan India	5 – 10 Mhz
Mid Band	Pan India	15 – 25 Mhz ¹
High Band	Pan India	30 – 40 Mhz

Share of Spectrum



1. Except for Kolkata (10 Mhz)

Brilliant experience

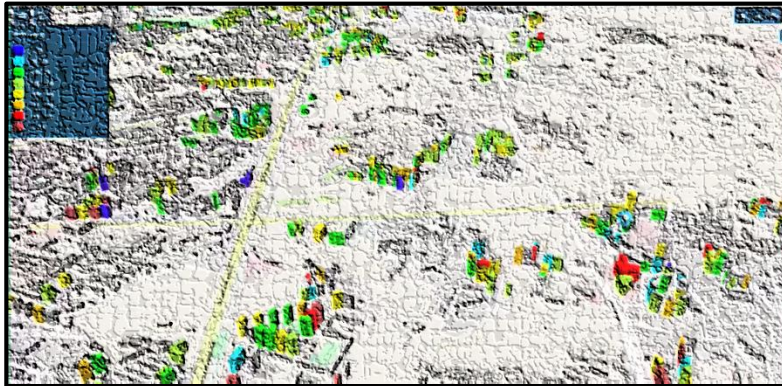
State of the art network tools



EXPERIENCE

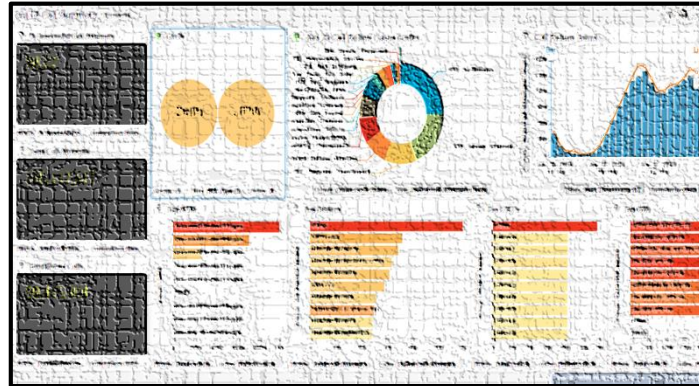
REFER

Data Experience



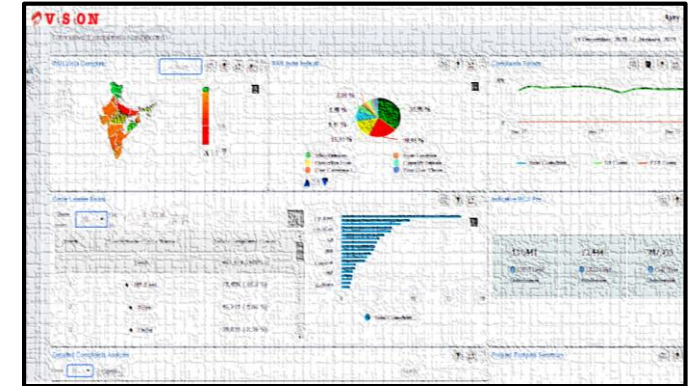
Grid → Cluster → Customer level

Voice Experience



VoLTE and VoWiFi analytics

Single Pane of Glass



Singular view; Automated root cause analysis

Omni Channel experience

Obsession with experience



EXPERIENCE

REFER

Leveraging the best of technology



Speech analytics



AI Ops in Customer care

Building Virality at every touch point



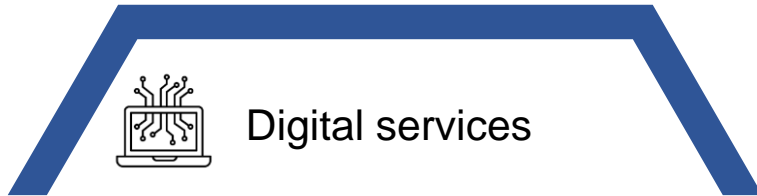


Our strategy

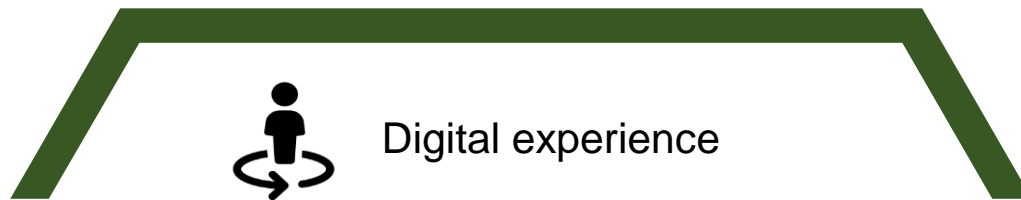


Airtel : What we have built

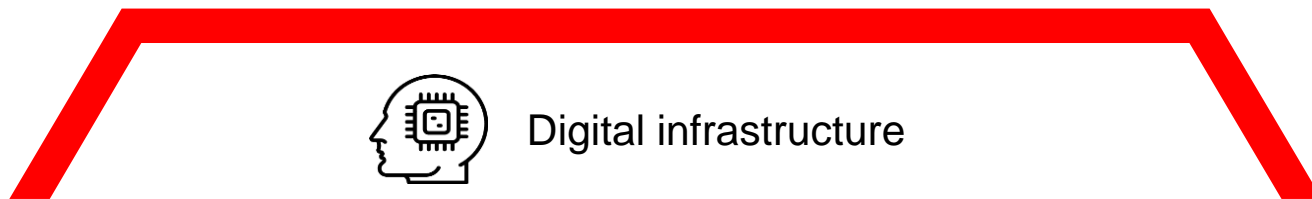
Compelling Capabilities : Digital at our Core



- Industry leading Digital assets



- One Customer. One Airtel. Omni channel



- \$46bn digital highway

Services at scale

We believe that we can now monetize these digital services



Cloud Communications



Data Centers



Security & Cloud



Adtech



Payments



Digital marketplace



Services at scale

We are well-positioned in each of these adjacencies



Cloud Communication

Data Centers

Security and Cloud



Market size (FY25)
and CAGR (22-25)

20,000 crore

14,000 crore

31,000 cr

+36%

+22%

+26%



Why are we well
positioned



Airtel IQ

A core right for telco to
win



Nxtra From Airtel

Preferred relationships, solid
funnel



Airtel Secure. Airtel Cloud

Marquee partnerships, CERT
empanelment, SI capabilities



Early results

185+ marquee customers



Working across hyperscalers

230+ brands onboarded



Services at scale

We are well-positioned in each of these adjacencies



Adtech

Payments

Digital Marketplace



Market size (FY25) and CAGR (22-25)

31,000 cr

+38%



Why are we well positioned



Airtel Ads
184Mn MAUs, Owned-channel supply



Airtel Payments Bank
Leverage 100M Thanks users, 8 Mn merchant base



Scaled partnerships
Proprietary credit score; monetization capabilities, low cost of acquisition



Early results

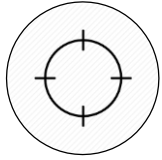
135+ brands served



122mn+ customer base

Insurance, lending, content bundling launched

Summary



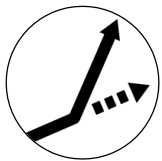
Well positioned as a portfolio : Businesses and Capabilities



The opportunity is exciting and attractive



A Proven Execution model with a cohesive and simple strategy

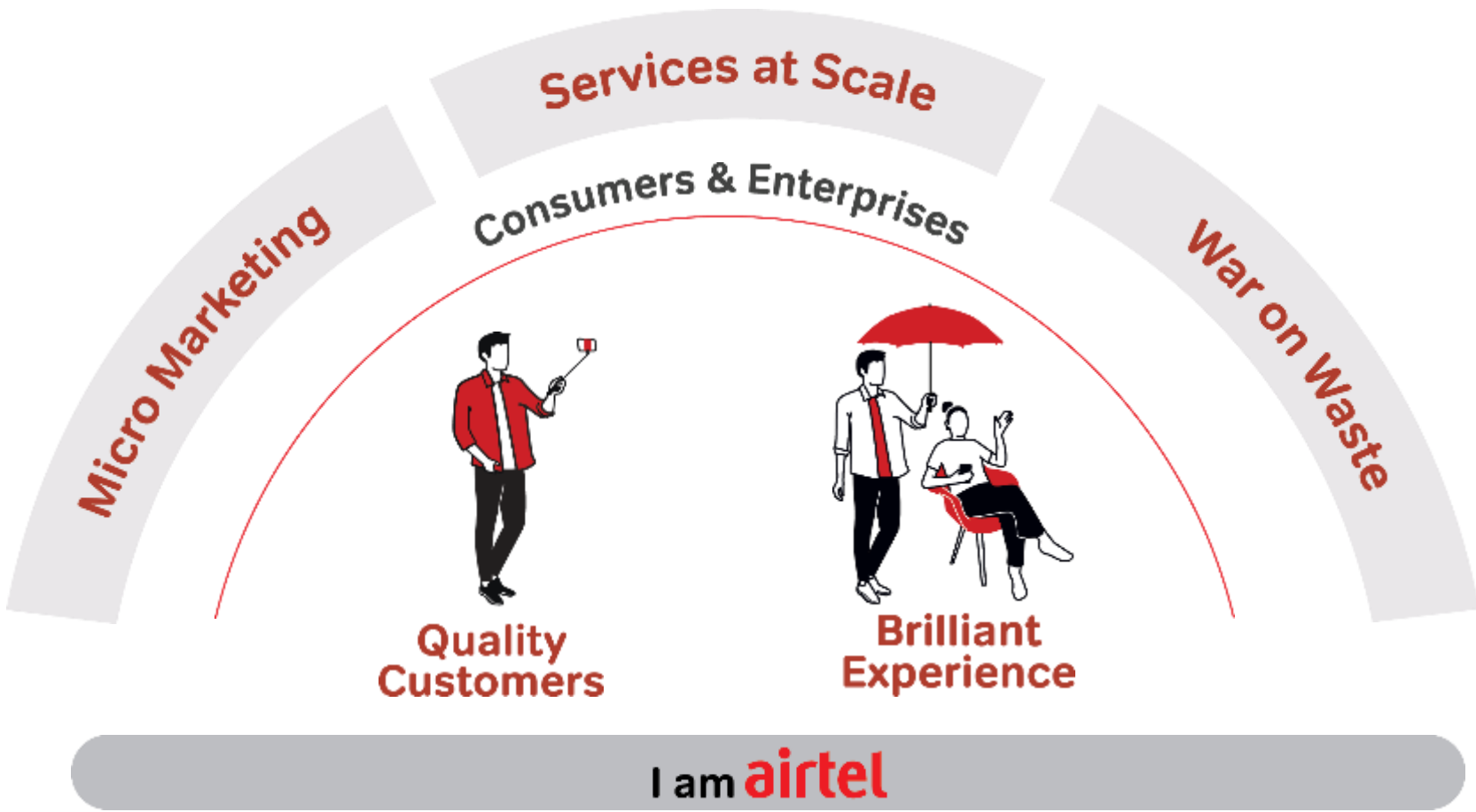


Now at a decisive cusp to become a strong digital services provider



Consumer Business

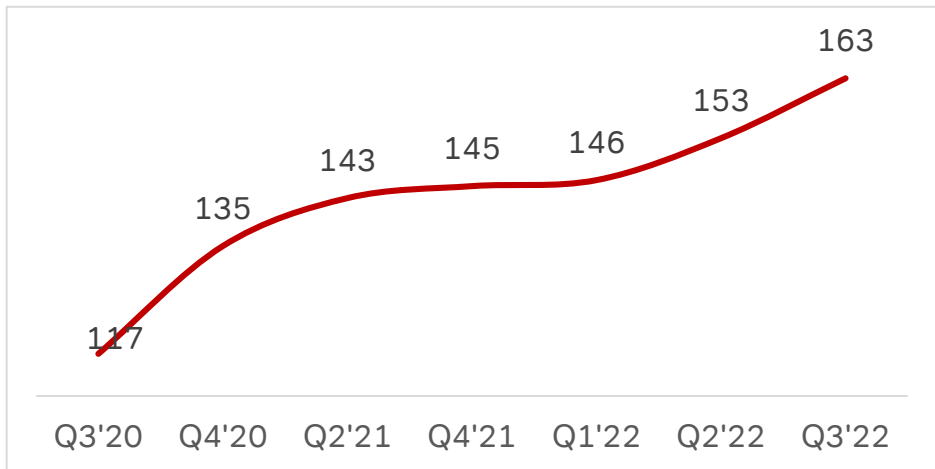




Deliver Strong ARPU growths through Premiumizing our Customer Base



ARPU (INR)



High Value Homes Customers



Mid-market Smartphone Customers



Feature Phone Customers

1

Upgrade to Airtel Black

2

Upgrade to Postpaid, Fiber & Converged Entertainment

3

Grow ARPU with Digital Engagement

4

Upgrade to Smartphones



Our Premiumization Agenda



High Value Homes
Customers



Mid-market Smartphone
Customers



Feature Phone Customers

1

Upgrade to Airtel Black

2

Upgrade to Postpaid, Fiber &
Converged Entertainment

3

Grow ARPU with digitally engaged
users

4

Upgrade to Smartphones

Key Enablers

Cutting edge Customer
Lifecycle Management
Capabilities

Omni-channel Capabilities

Aspirational Brand

Our Premiumization Agenda



High Value Homes
Customers



Mid-market Smartphone
Customers



Feature Phone Customers

1

Upgrade to Airtel Black

2

Upgrade to Postpaid, Fiber &
Converged Entertainment

3

Grow ARPU with Digitally engaged
users

4

Upgrade to Smartphones

Key Enablers

Cutting edge Customer
Lifecycle Management
Capabilities

Omni-channel Capabilities

Aspirational Brand

Customer 360

Sharp cohorts through Data Science

1



3 service users

2



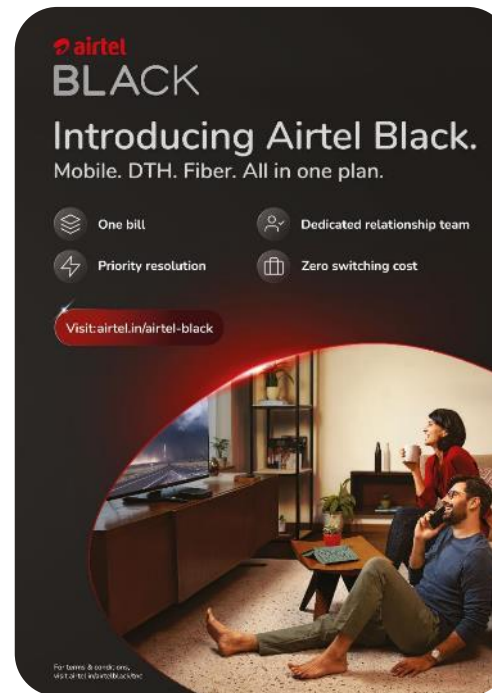
2 service users

3



Single Service users

Best-in-class Experience



airtel BLACK
Introducing Airtel Black.
Mobile. DTH. Fiber. All in one plan.

- One bill
- Priority resolution
- Dedicated relationship team
- Zero switching cost

Visit: airtel.in/airtel-black

Compelling Propositions



airtel BLACK
Introducing
All-in-one entertainment plan

₹999 Fiber + ₹350 DTH = ₹1,099 Fiber + DTH
~~₹1,349~~

- Fiber with 200 Mbps speed
- 14+ OTT apps & 350+ TV channels
- Up to ₹1,000 cashback

Disney hotstar prime video sony liv eros now +10

Postpaid

Upgrade through sharp targeting and easy upgrade online




Likely to Upgrade cohort identification

 Handset > Rs. 15000

 Credit Approved Users

 Advanced Financial Services users

 Phone number linked to utilities

Persuasion

airtel

You've been chosen for Postpaid.

Basis your data usage.

- ↔ Carry Forward Unused Data
- ∞ No Daily Data Limit

[Upgrade To Postpaid](#)

T&C Apply

airtel

Congrats! You've unlocked our postpaid benefits.

- ⚡ Priority services
- ∞ No daily data limit

[Upgrade Now](#)

T&C apply

Simple Upgrade Process

SIM Activation at zero cost
Get ₹250 OFF on SIM activation

OFFER ENDS IN **91** Days **23** Hours

Airtel Postpaid Plans Noida

Infinity Family Plan 399 [Buy](#)

₹399

- SIM: 1 Regular SIM
- Data: 40 GB Per Month
- Calls: Unlimited Local/STD/Roaming

Select Connection Type

- New Connection
- Airtel Prepaid to Postpaid
- Port your Number

[Continue](#)

OTT + Linear

Converged viewing



Bundled Packs For Converged Content



Brilliant Viewing Experience

Single Sign-on



Great Value & Simplified payments



Our Premiumization Agenda



High Value Homes
Customers



Mid-market Smartphone
Customers



Feature Phone Customers

- 1 Upgrade to Airtel Black
- 2 Upgrade to Postpaid, Fiber & Converged Entertainment
- 3 **Grow ARPU with digitally engaged users**
- 4 Upgrade to Smartphones

Key Enablers

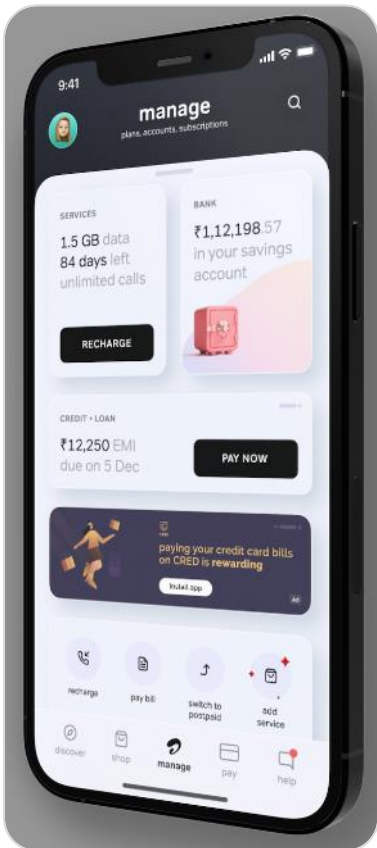
Cutting edge Customer
Lifecycle Management
Capabilities

Omni-channel Capabilities

Aspirational Brand

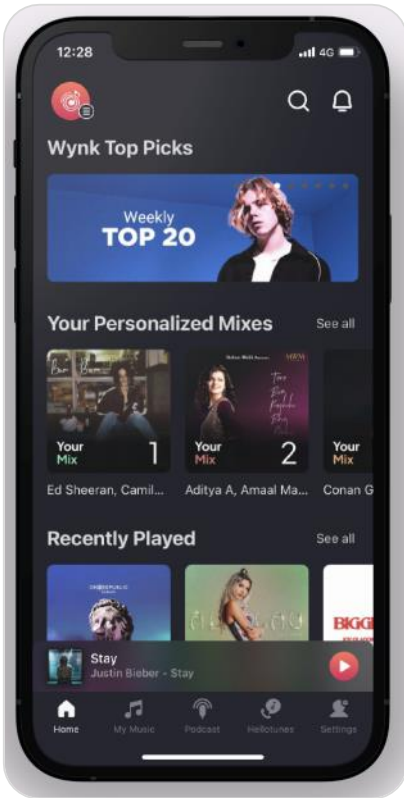
A loyal customer base engaged deeply with digital offerings

Thanks App MAUs



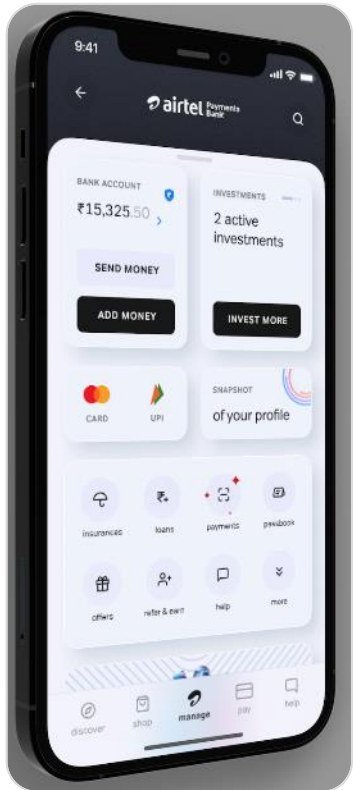
43Mn **74Mn** **102Mn**
 Jun'19 Jun'20 Dec'21

Wynk MAUs



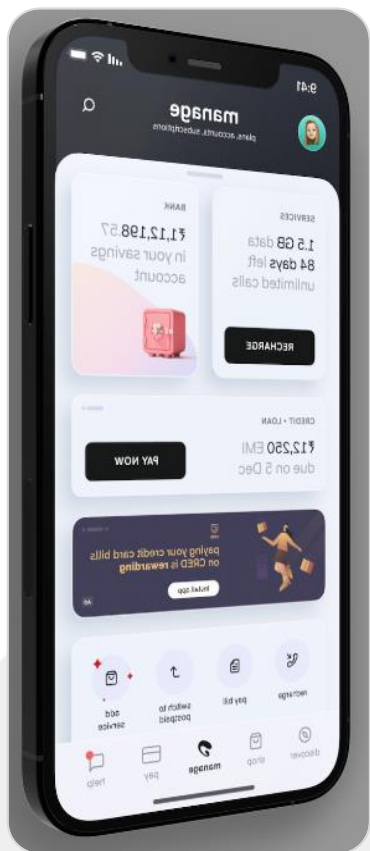
24Mn **51Mn** **71Mn**
 Jun'19 Jun'20 Dec'21

Payments Bank MTUs

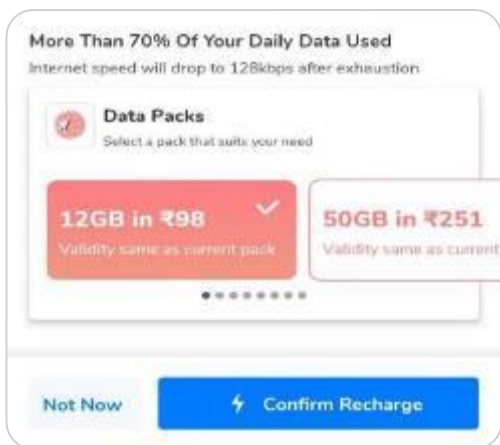


8Mn **18Mn** **32Mn**
 Jun'19 Jun'20 Dec'21

'Real-time' & 'trigger-based' marketing for ARPU growth

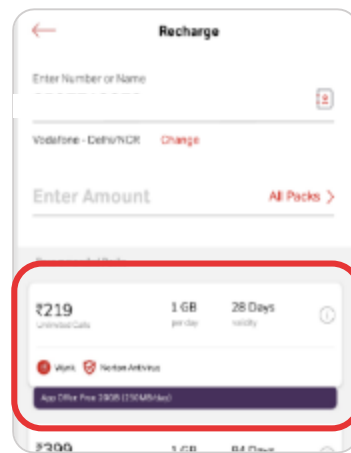


Real Time Triggers

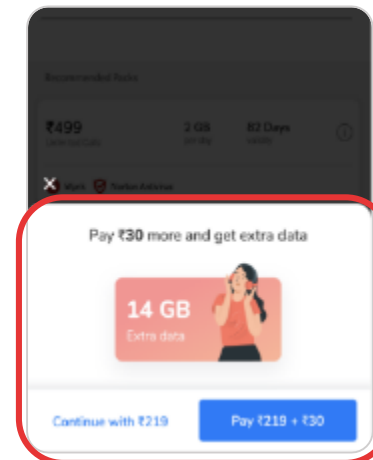


Real Time data threshold alerts

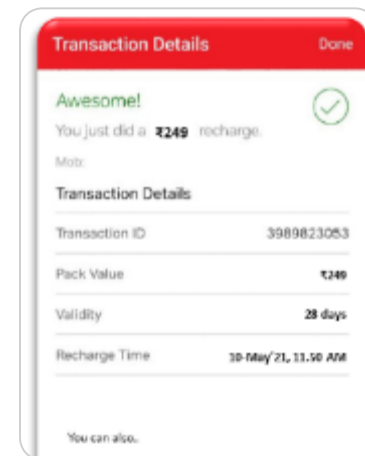
Contextual Pop-ups



Customer selects pack



Upgrade suggested at checkout



Contextual messaging leads to adoption

3 revenue streams driving upgrades



Data Pack

Content Bundles

Incr. Bundle Upgrades

Our Premiumization Agenda



High Value Homes
Customers



Mid-market Smartphone
Customers



Feature Phone Customers

1

Upgrade to Airtel Black

2

Upgrade to Postpaid, Fiber &
Converged Entertainment

3

Grow ARPU with Digitally engaged
users

4

Upgrade to Smartphones

Key Enablers

Cutting edge Customer
Lifecycle Management
Capabilities

Omni-channel Capabilities

Aspirational Brand

Network of Choice for Smartphone Users

Differentiated Offering for all Customer types



Wynk Music Bundles



Airtel Xstream OTT Bundles



Insurance Bundles



Bank Wala Sim

Lead with Network Experience to create a loyal customer base



98%

Active base% of total base*

LOWEST CHURN
TELCO

Lead with Technology Innovation



1st to launch VoWiFi



Best Gaming Experience**



5G Ready Network

*As per TRAI Report

**As per Open Signal's Mobile Network Experience Report : Sept 2021

Upgrade the Feature Phone Users

Mera Pehla Smartphone Program



Loyalty Cashback

airtel

Get ₹6000 cashback on your first smartphone

- Free screen replacement for 1 year
- Recharge with ₹249 and above
- Unlimited calling and 1.5 GB data/day

₹6000 cashback

Image showing a feature phone and a smartphone.

New Device platform

Device Lock Platform

Upfront Cashbacks

Universal Offering

Our Premiumization Agenda



High Value Homes
Customers



Mid-market Smartphone
Customers



Feature Phone Customers

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Users

4

Upgrade to Smartphones

Key Enablers

Cutting edge Customer
Lifecycle Management
Capabilities

Omni-channel Capabilities

Aspirational Brand

Cutting Edge AI-ML and Customer Lifecycle Management Tools

Powering Retention and ARPU



Single View of Airtel Customers



Omni-channel connect
based on customer preference



AI-ML based rule engine
driving LTV growth

Segmentation and sharp shooting driving growth



Segment 1



Segment 2



Segment 3



Segment 4



Segment 5

Our Premiumization Agenda



High Value Homes
Customers



Mid-market Smartphone
Customers



Feature Phone Customers

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Upgrade to Smartphones

Key Enablers

Cutting edge Customer
Lifecycle Management
Capabilities

Omni-channel Capabilities

Aspirational Brand

Digitally Powered Channels to serve our businesses

Two Channels Types across businesses

High Value Businesses



Mass Businesses



Direct to Customer



Indirect – Mass Retail

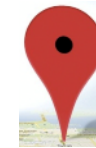
With Omni-channel capabilities



All Airtel services



Connecting Online & Offline



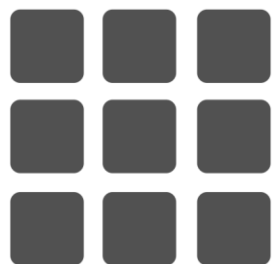
Micro-Marketing



Digital tools for Productivity

Micro-Marketing

Mass Retail



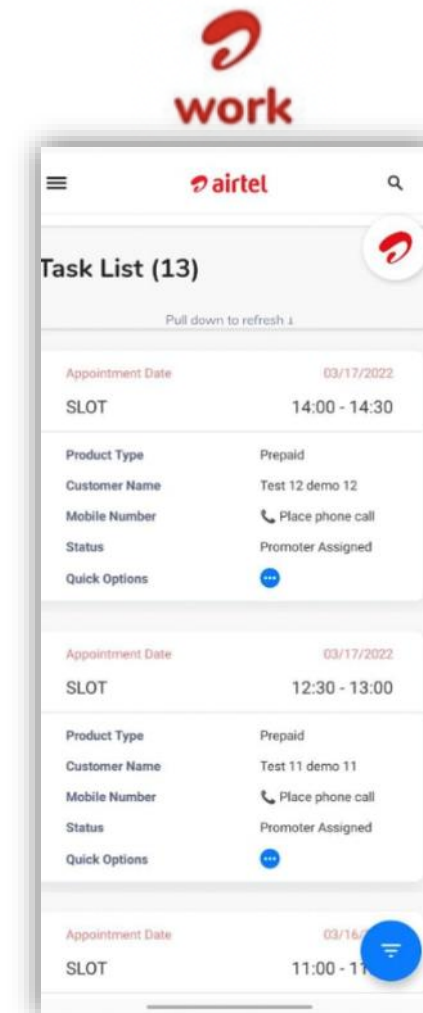
Grids Way-of-Working

Direct-To-Customer



Catchment Marketing

Sales-Force Automation



Our Premiumization Agenda



High Value Homes
Customers



Mid-market Smartphone
Customers



Feature Phone Customers

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Upgrade to Smartphones

Key Enablers

Cutting edge Customer
Lifecycle Management
Capabilities

Omni-channel Capabilities

Aspirational Brand

Built one of the Strongest Consumer Brands in India

Consistently ranked among the Most Trusted Brands in India

Differentiation led by Care & Innovation



BRANDS
Here is how Airtel, TCS and Asian Paints continue to win consumer trust despite challenging times

TELECOMtalk NEWS VOICE & DATA BROADBAND DTH & CABLE MOBILE & TABLETS REVIEWS

Bharti Airtel is the most trusted telecom brand in India: Survey

Business
Airtel ranked No 1 service brand



With an obsession of serving customers needs better, everyday...



Our Purpose

Customer Service is paramount

Transparency with Customers





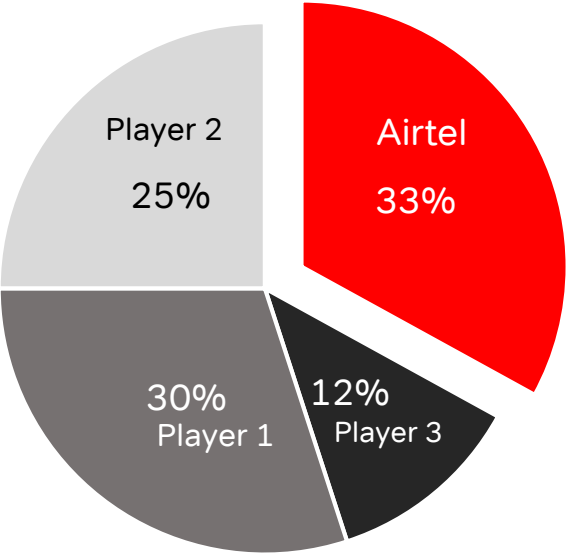
Network

25th March 2022

Best Spectrum holding in the country



Spectrum share



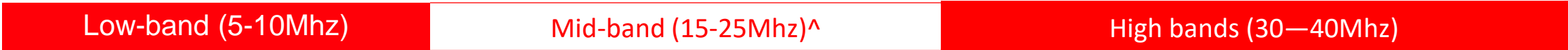
Maximum share of liberalized spectrum



Healthy mid-band range spectrum



Sub Ghz spectrum pan-India



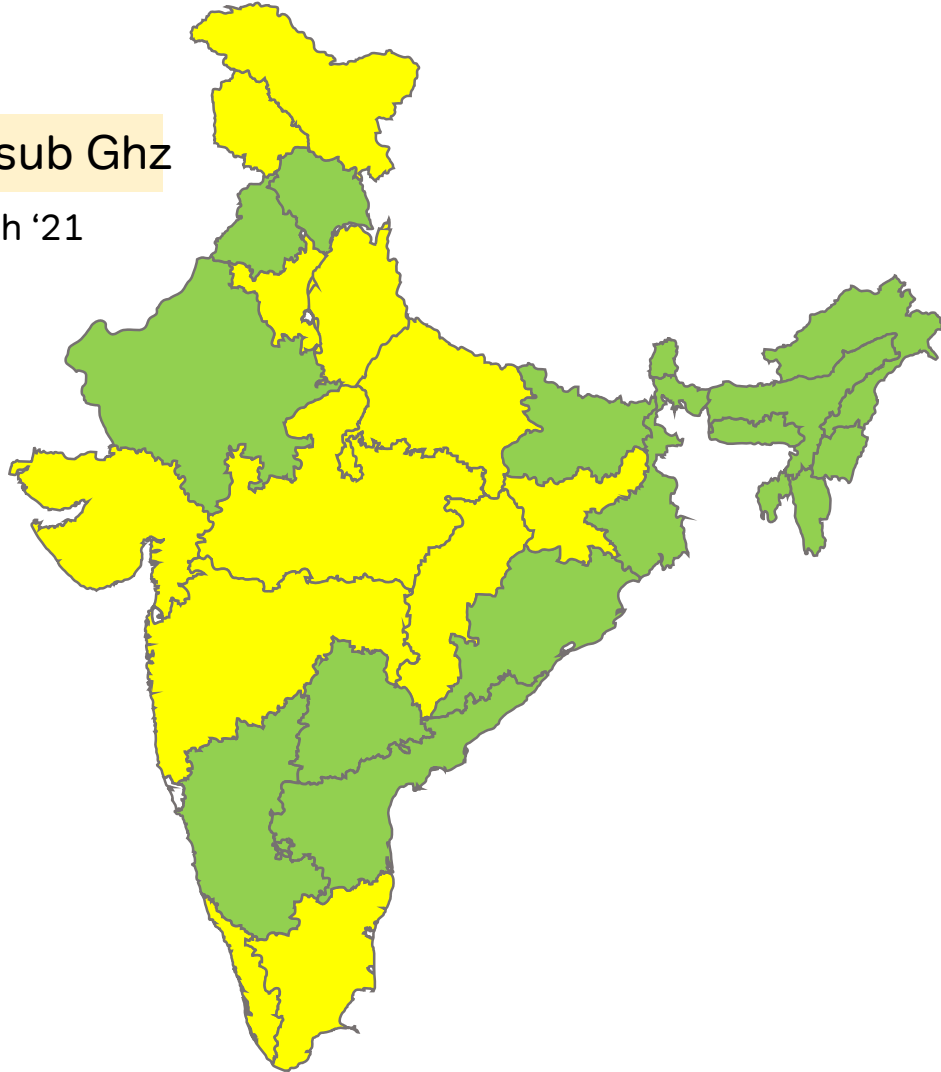
Highest mid-band range among competition

[^] Except for Kolkata (10 Mhz)

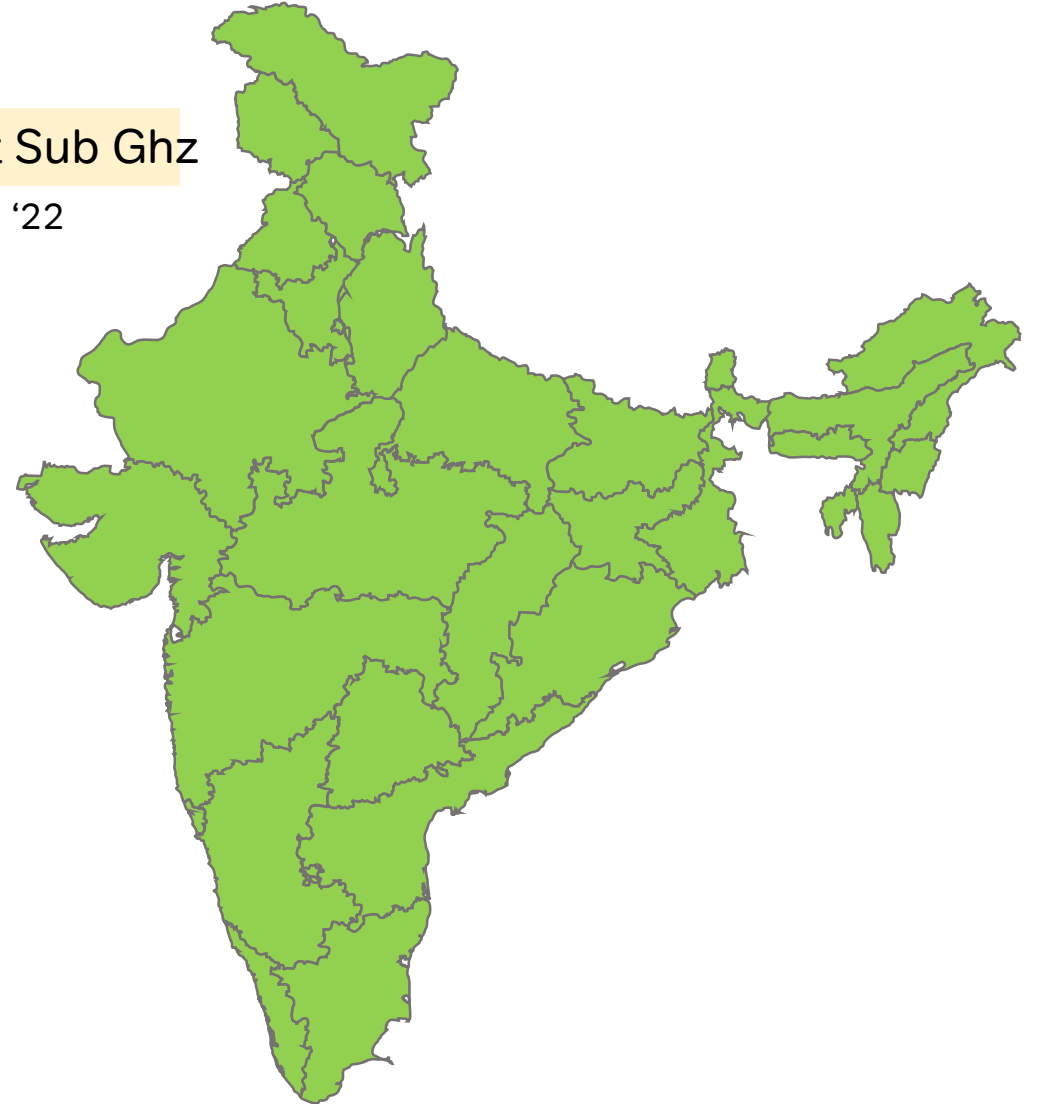
Deeper and wider coverage pan-India with Sub Ghz



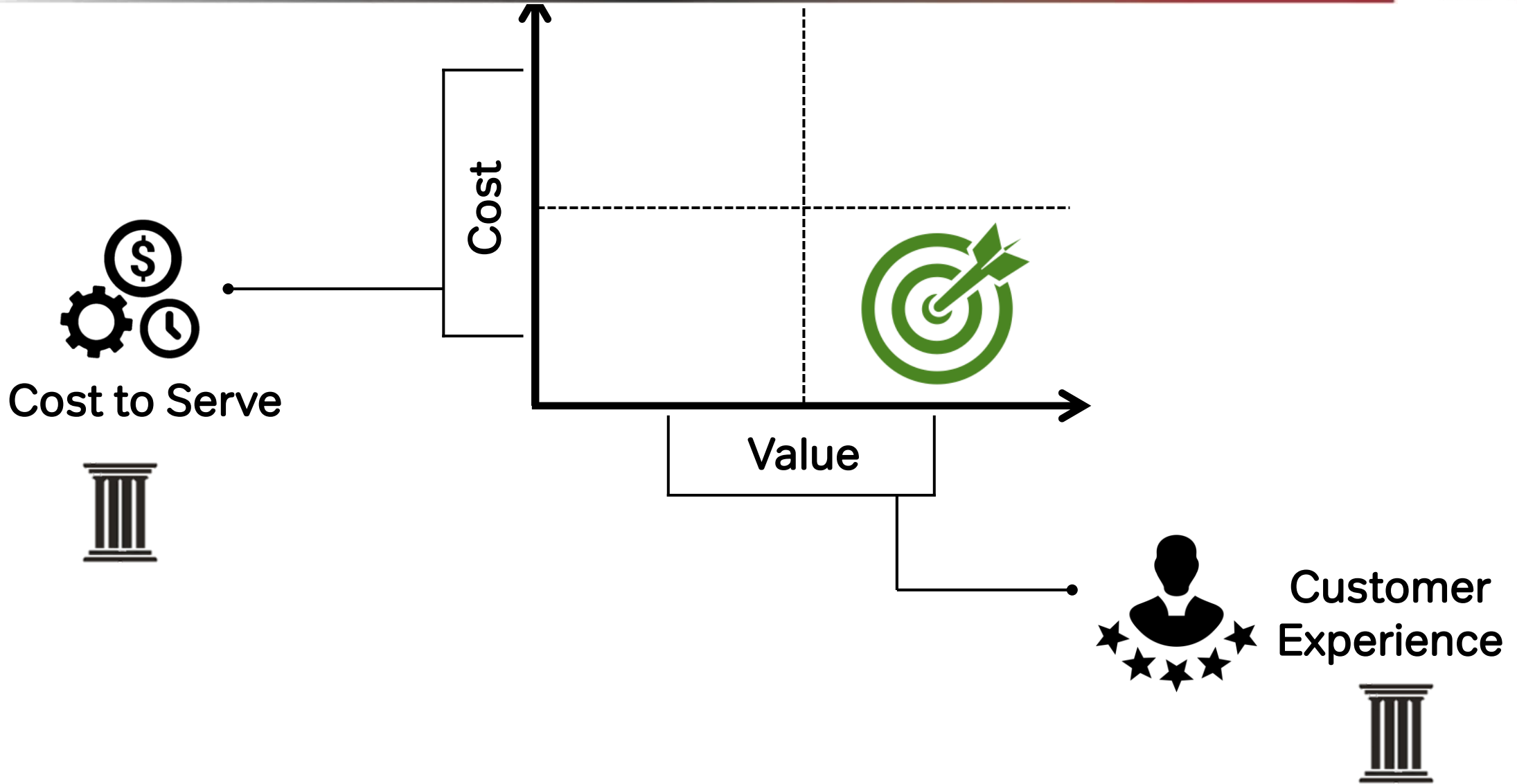
Pre-sub Ghz
March '21



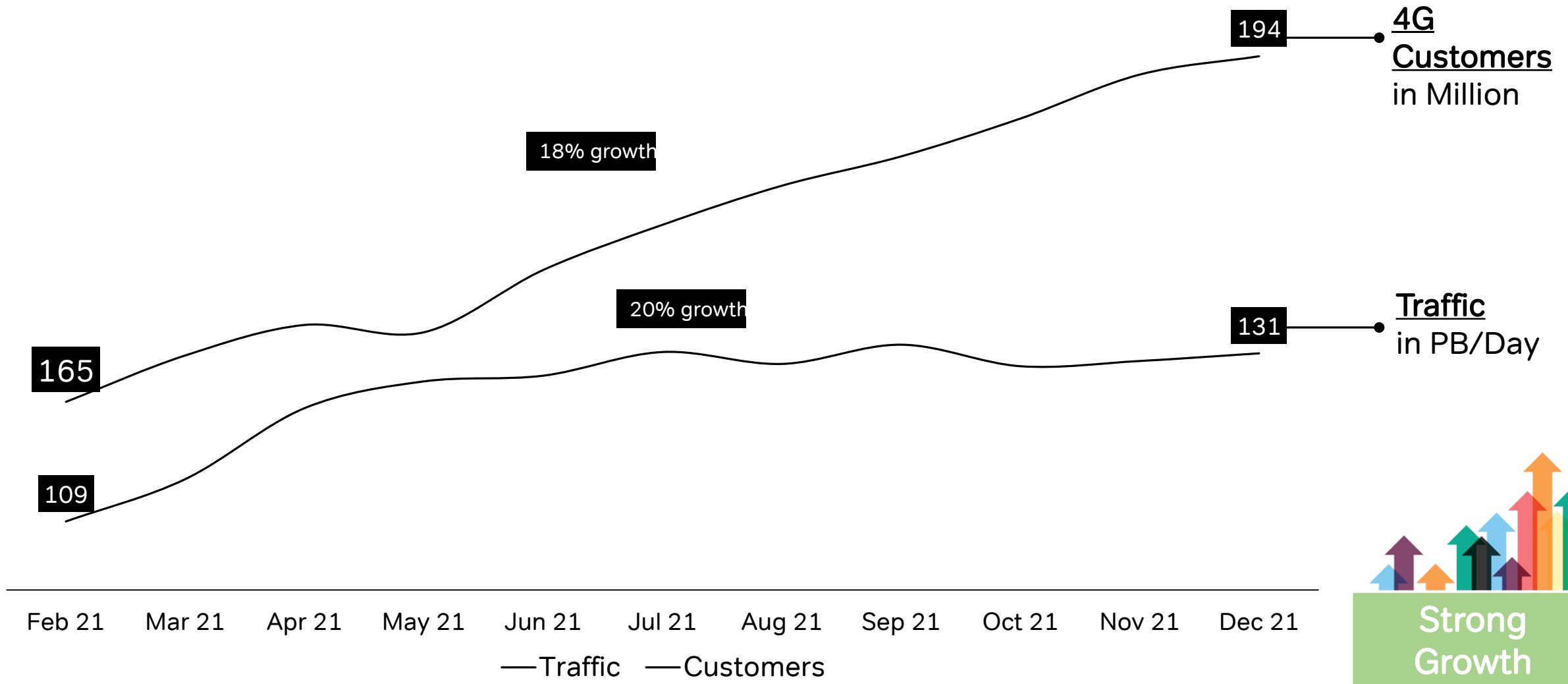
Post Sub Ghz
March '22



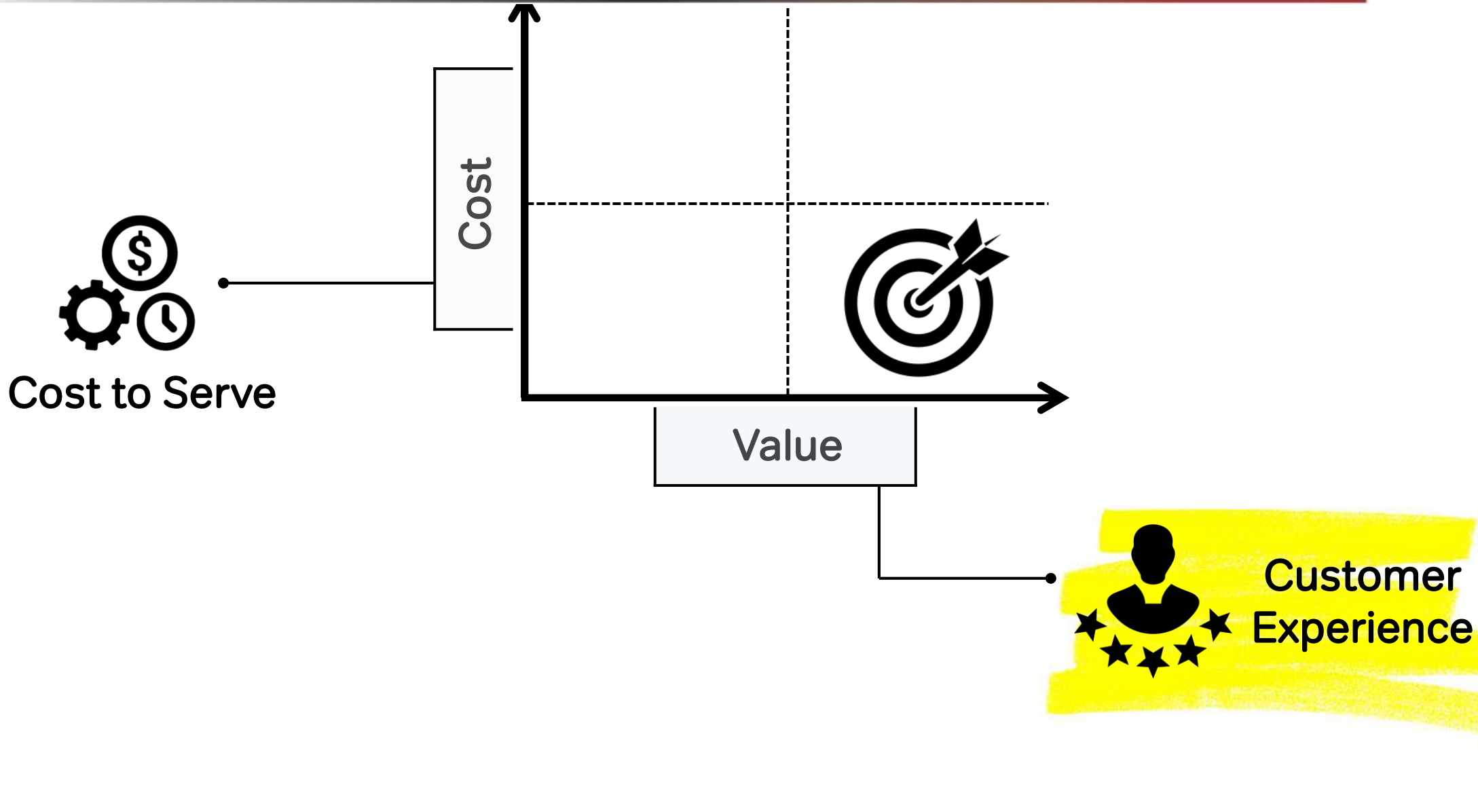
Our pillars



Growth Journey of Mobility Network

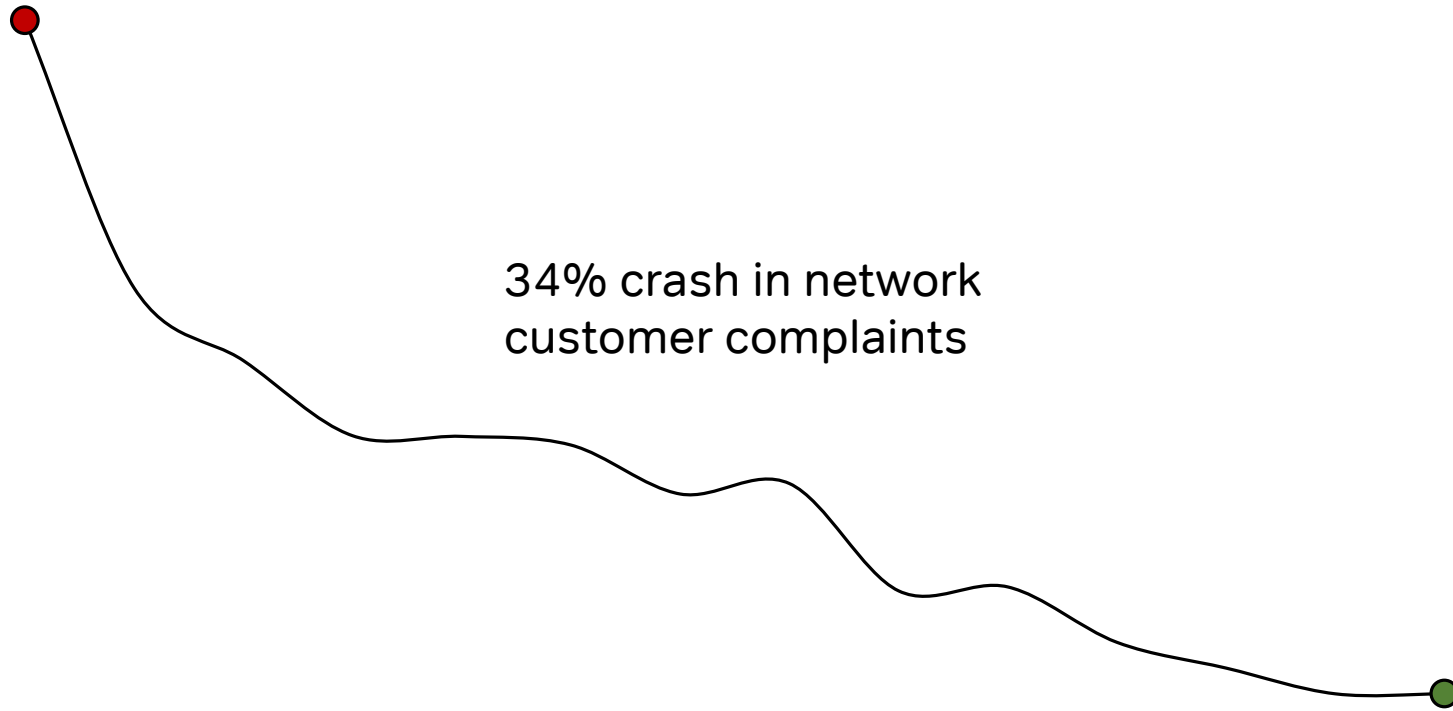


Customer Experience Leadership



Direct Measure of Customer Experience

Customer Complaints



Initiatives for reducing Customer Complaints

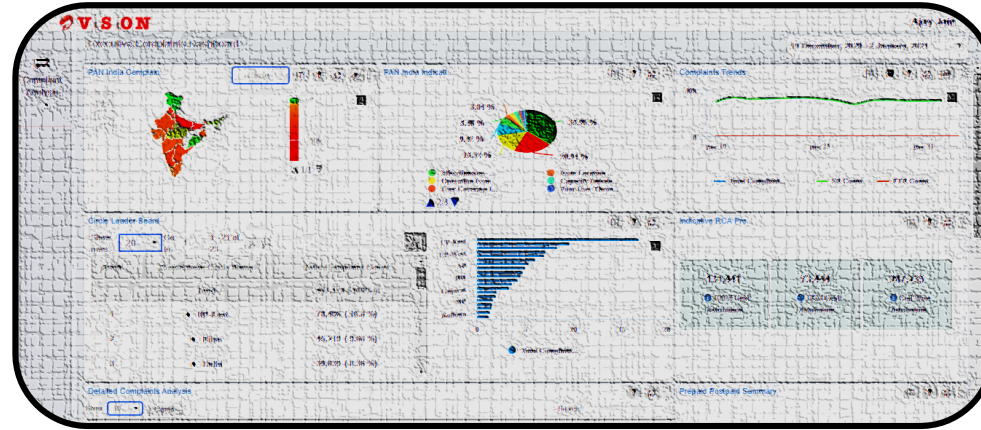
- Focused Root Cause Analysis
- Plugged Operational Gaps
- Inculcate use of Tools
- Heavy use of AI ML based automation

Customer Complaints

Jan 21 Feb 21 Mar 21 Apr 21 May 21 Jun 21 Jul 21 Aug 21 Sep 21 Oct 21 Nov 21 Dec 21 Jan 22 Feb 22

Digital Complaint Handling

Automated Precision



360 degree view of the complaint



Customer touchpoints



Capture Customer inputs



Root Cause Analysis

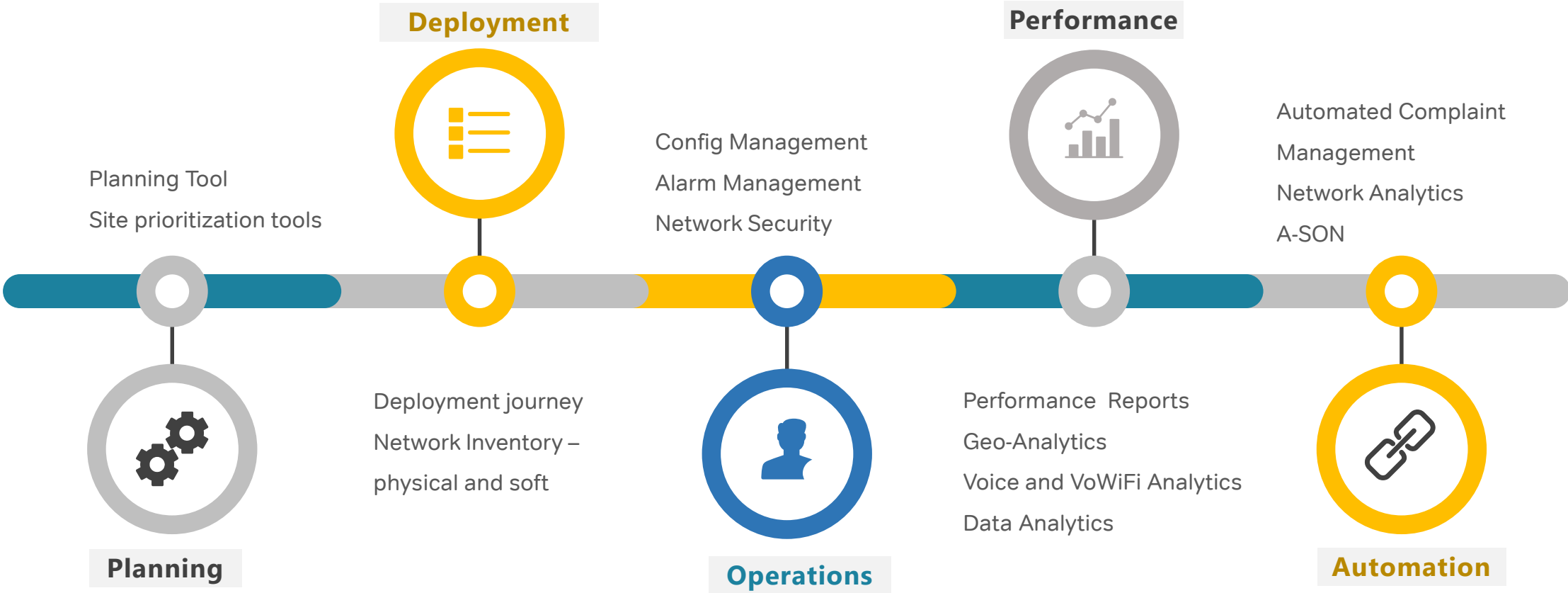


Actions & Resolution



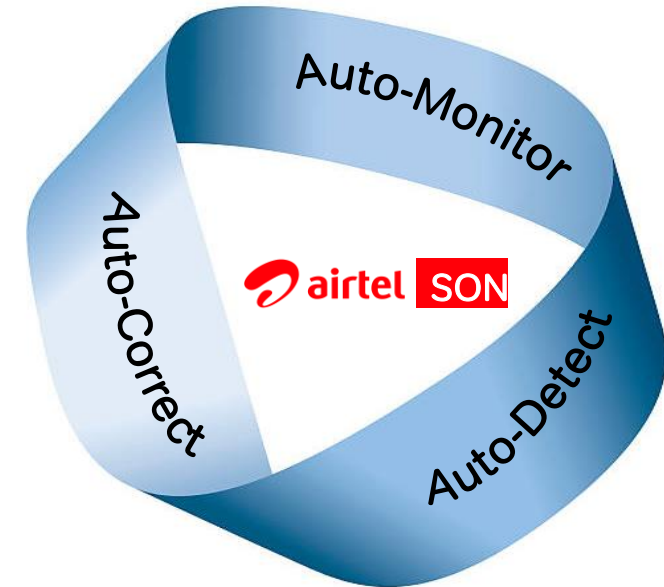
Customer Communication

Holistic view of the digital tools



Mass scaled Use-cases

- Power Saving Feature (Cost)
- Duct Mitigation Feature (Experience)
- Auto-layer Balancing Feature (Experience)
- Auto-degradation Corrections (Experience & Cost)
- And more in pipe



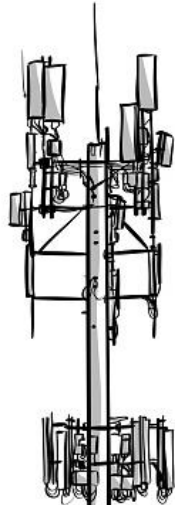
WiFi @ Home Experience

Experience value-chain



End to End Experience

- Video Calling
- Gaming
- OTT experience



'One Airtel Org'

- Planning convergence
- Better Optimization
- Stronger Control



Home Delivery Experience

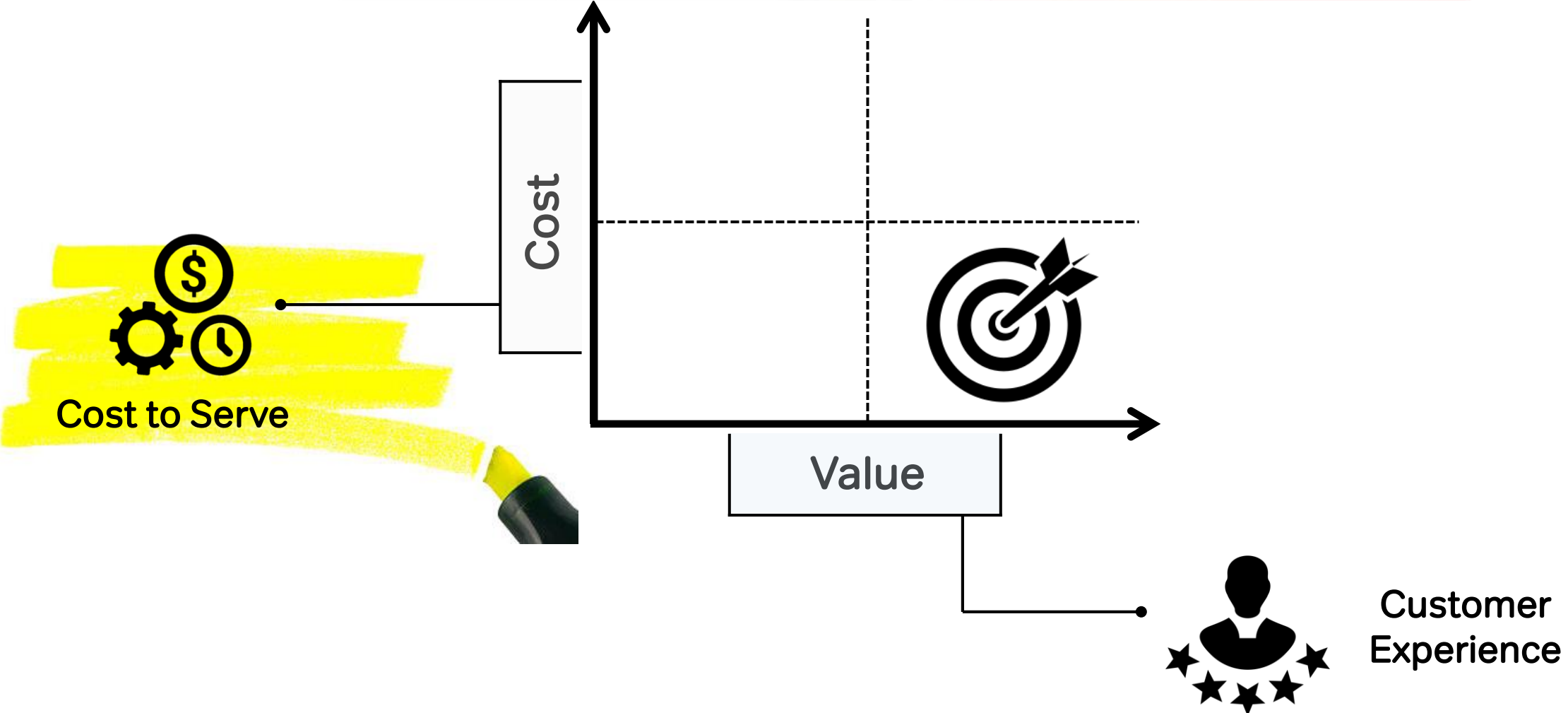
- Installation & Fault Repair
- Multi-Services under one roof



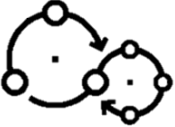
In-Home Experience

- Coverage Analysis
- Experience analytics
- Plug coverage gaps

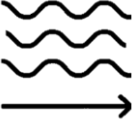
Cost Leadership



Driving lower cost through efficiency



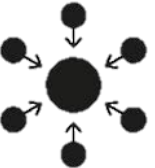
Pooled software licenses
Hardware efficiency



Smart spectrum usage



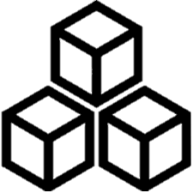
Smart site planning



Converged core



Single efficient charging
system (IN)



Architectural interventions
to sweat our assets

5G

The Promise



Extremely High Speeds
(eMBB)



Ultra Low Latency
(URLLC)



Concurrency
(mMTC)

5G Trials

5G Trials



● Sub 6
3500 MHz

● mmWave
26 GHz

● Rural
Coverage Test

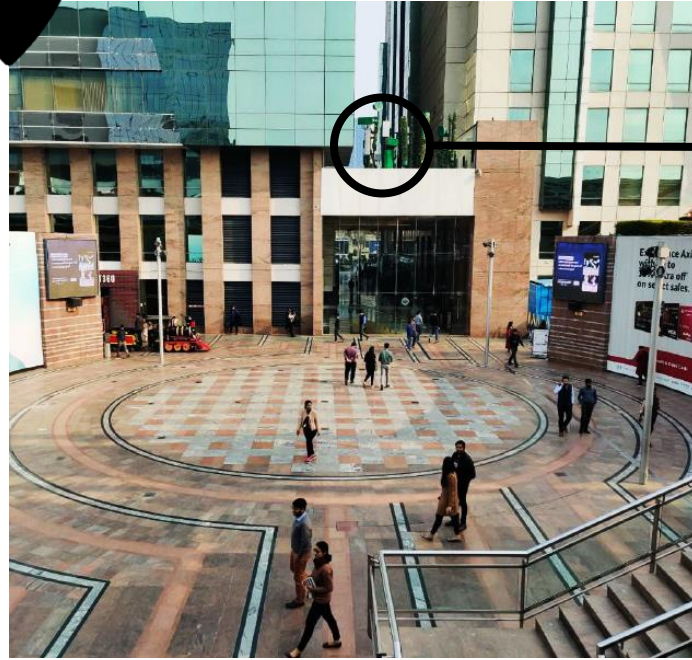
5G Trials

Sub 6
3500 MHz

mmWave
26 GHz

Rural
Coverage Test

Cyber Hub, Gurgaon, HR



5G Radio

4G 1800 Ant

4G Radio

Zoom In
of Radio Units



1.47 Gbps
Peak Downlink



120 Mbps
Peak Uplink



10 - 12 ms
Latency

5G Trials



- Sub 6
3500 MHz
- mmWave
26 GHz
- Rural
Coverage Test

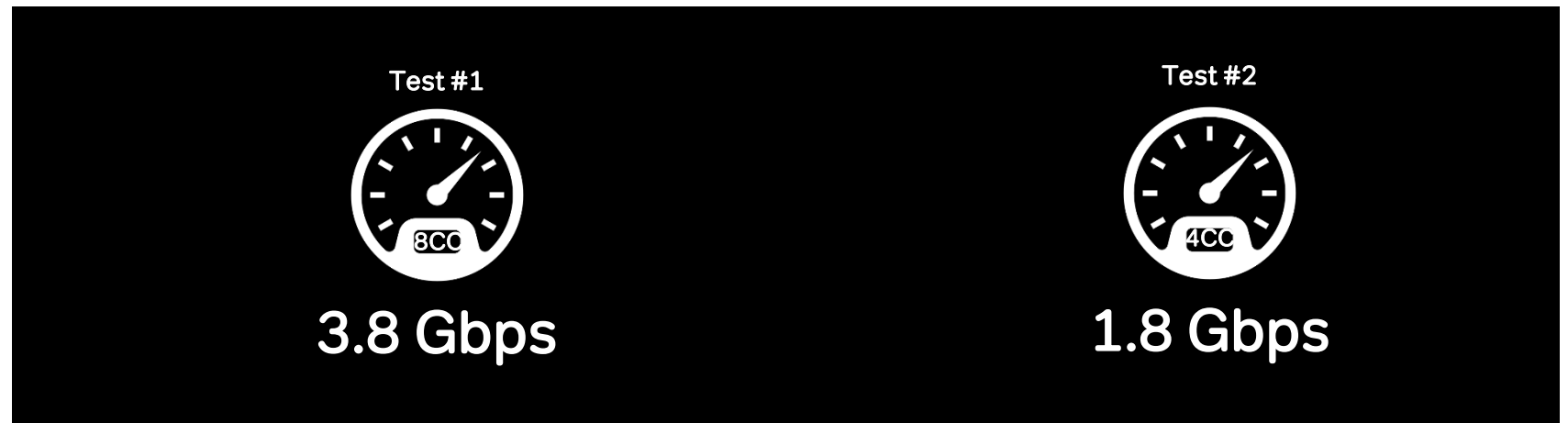
Test #1

Location	Airtel, Gurgaon
Band	26 GHz
BW	800 MHz (8CC)
Config	NSA
Device	WNC Router

Test #2

Location	Airtel, Bangalore
Band	26 GHz
BW	400 MHz (4CC)
Config	NSA
Device	5G Mifi

Peak Downlink Speed

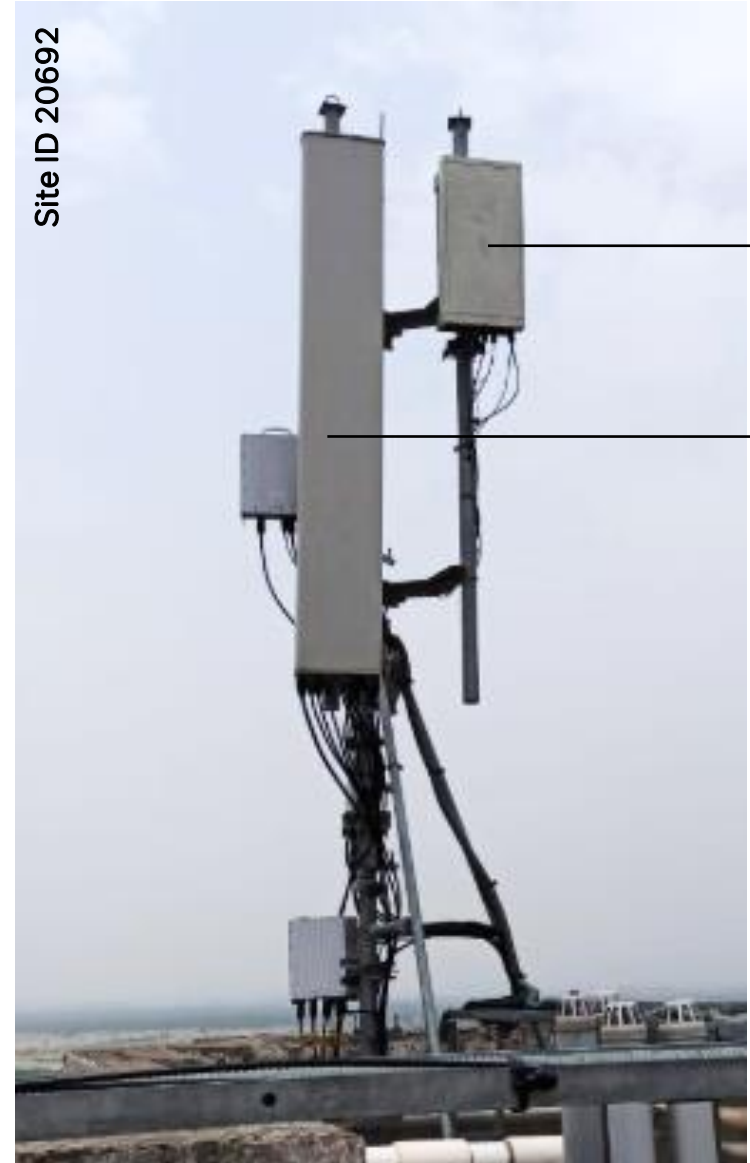
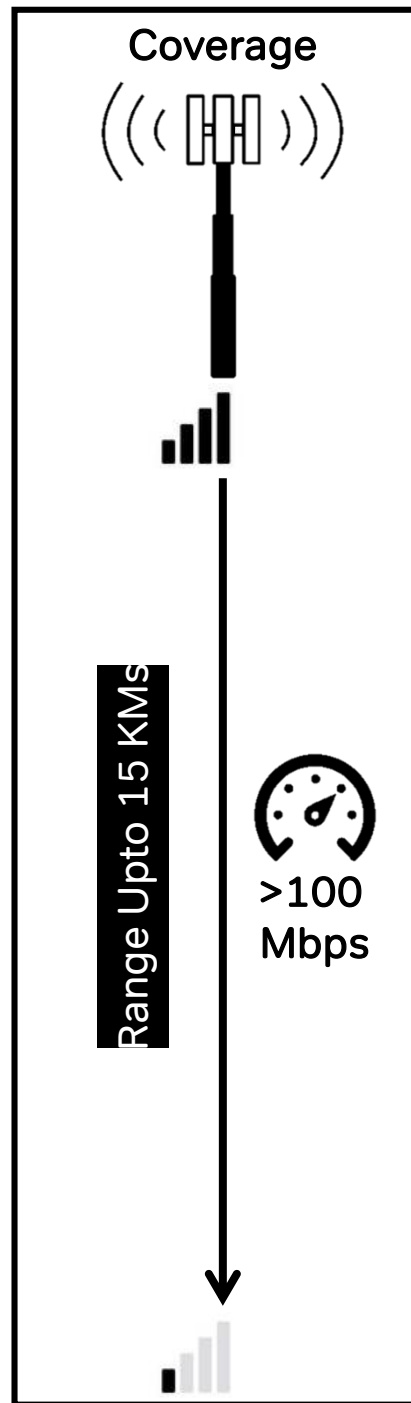


5G Trials

● Sub 6
3500 MHz

● mmWave
26 GHz

● Rural
Coverage Test



Site enabled with 15 KMs Coverage Extension

5G usecase

Cloud gaming



INDIA'S 1ST CLOUD GAMING DEMONSTRATION ON THE AIRTEL 5G TEST NETWORK with Mamba and Mortal



Mortal and Mamba enjoyed the thrilling session on smartphones connected to 3500 MHz high capacity spectrum band
The 5G test network delivered speeds in excess of 1 Gbps and latency in the range of 10 milliseconds

5G Enterprise usecase

Experience testing at Airtel 5G lab



Warehouse/Manufacturing
Drone based Smart Inventory



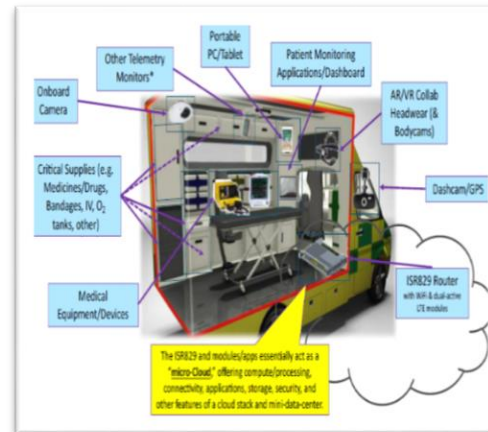
Warehouse/Manufacturing
Anomaly Detection



Shipyards Operations
Digital Twin



Retail/E-commerce
AR Shopping



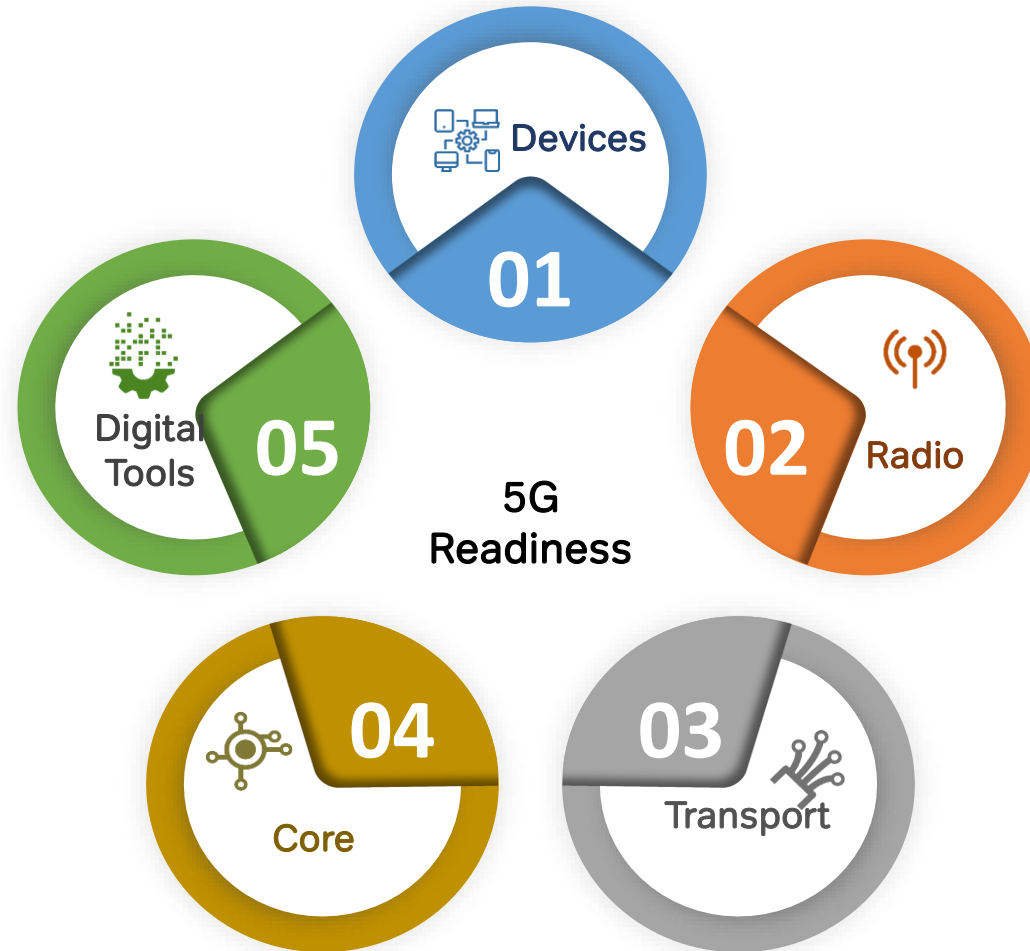
Healthcare
Connected Ambulance



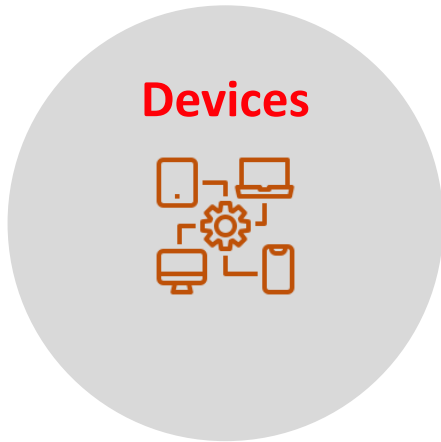
Video analytics
Airport security surveillance

Airtel 5G Readiness

From lab to life



Infra Readiness



From Lab To Life



Accelerate OEM Device Compliance

As per Airtel 5G
network requirements



5G Device Guide

Airtel 5G recommended handsets
based on OEM Compliance



Testing Checklist

Connectivity, Enhanced Coverage,
Superfast 4G & Overall 5G Experience



From Lab To Life



Maximize Network Coverage



Minimize Total Cost of Ownership



From Lab To Life

2 types of Transport Medium



Fiberized sites

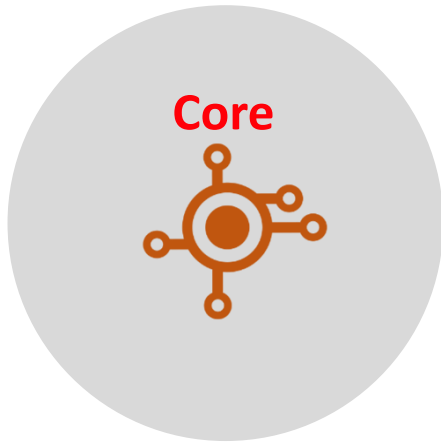


MHz

Microwave

Airtel 5G Readiness

Core



From Lab To Life



5G core ready

Airtel 5G Readiness

Digital Tool



From Lab To Life



Planning

5G Planning
& 5G Site prioritization



Deployment Journey

Digitize NW inventory &
Deployment workflows



Site Acceptance

Zero touch Site Acceptance

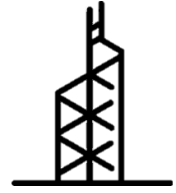


Operations & Optimization

Configuration Mgmt., Alarm Mgmt.
& Network Security

Airtel 5G Readiness

Infra Readiness



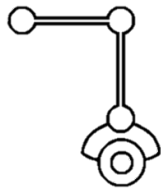
Tower Strengthening

Readiness to load
5G equipment



Power upgrade

Readiness for higher
power consumption



Mount Readiness

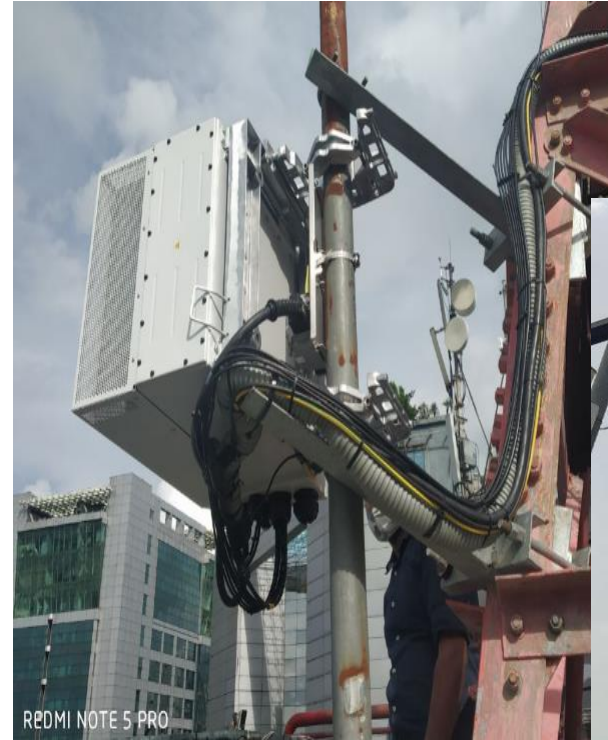
Additional mounts for antennas



Tower pre-feasibility

Checks completed

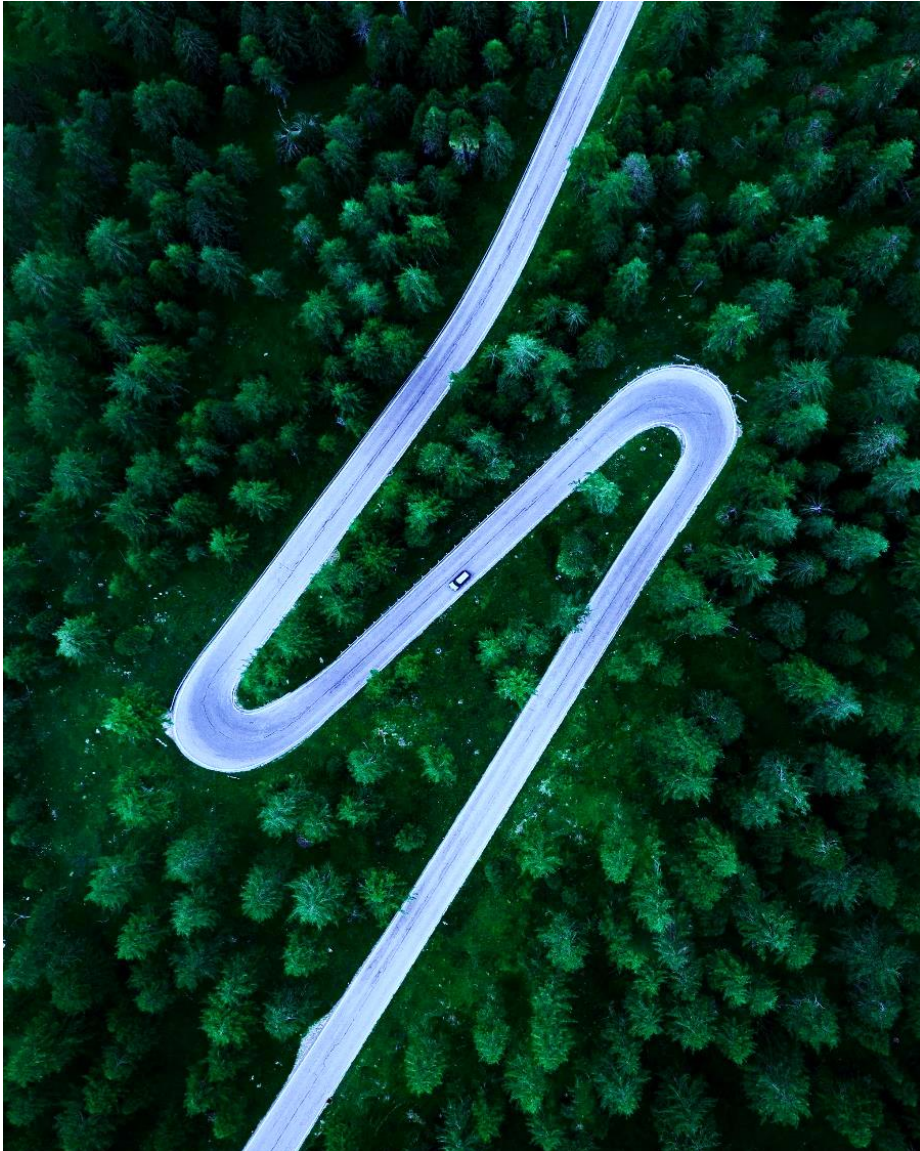
Tower Strengthening




Additional Mount



FY 2030 – 50% carbon emission reduction
FY 2050 – carbon net ZERO




7 AFFORDABLE AND CLEAN ENERGY



Crash carbon emission


Incorporate renewable energy

12 RESPONSIBLE CONSUMPTION AND PRODUCTION

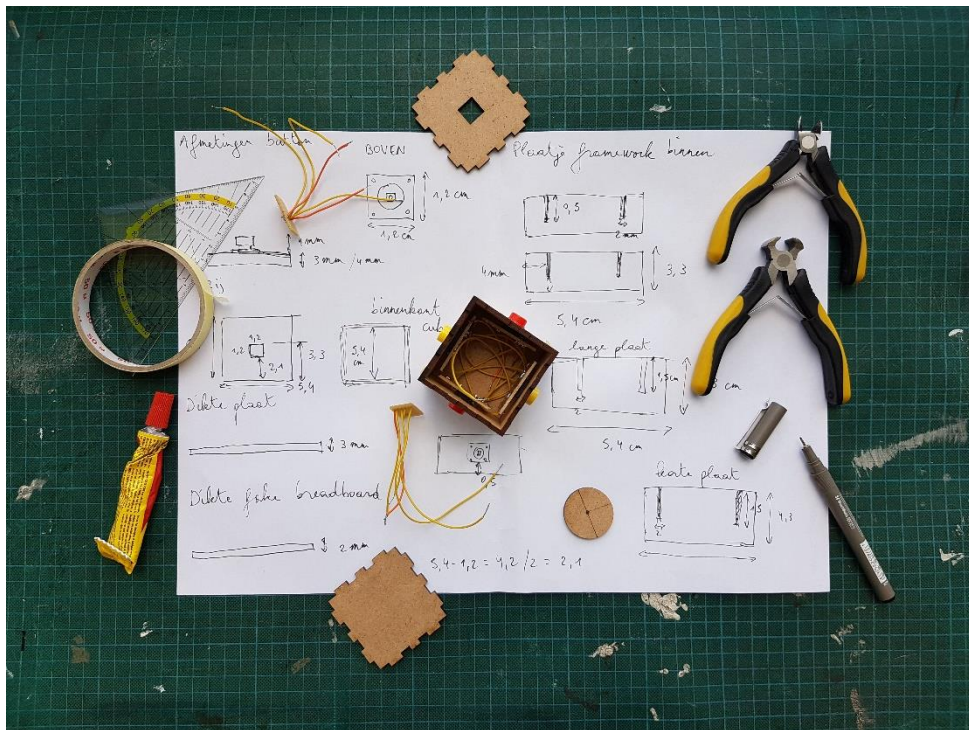


Sustainable waste management

13 CLIMATE ACTION

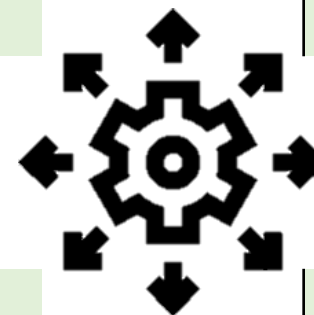


Build climate-change combat plan



Taking responsibility of our footprint

Science-based assessment and targets



Investing in innovation

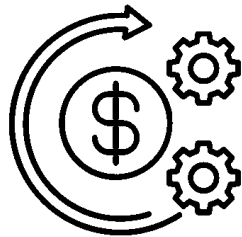
Policy advocacy with our partners



Reduction Energy consumption



Massification of solar



Operationally efficient infrastructure



Captive solar plants



Digital

25th March 2022

Digital Experience



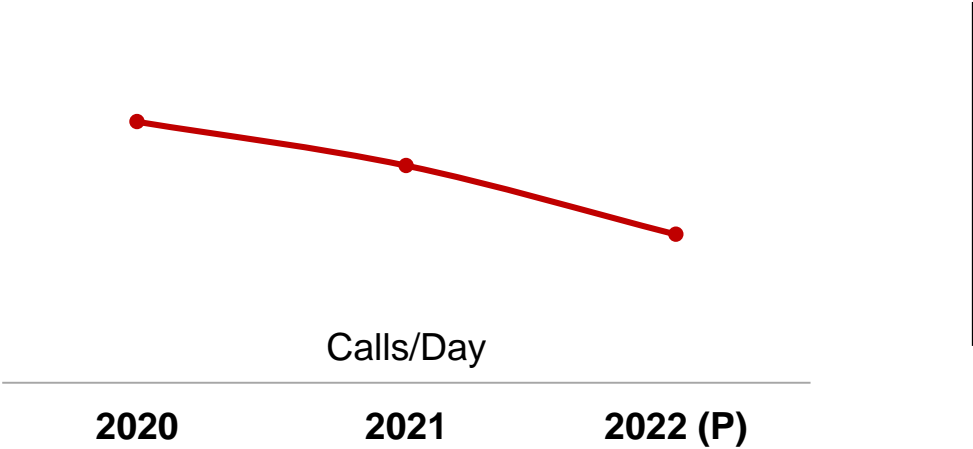
Digital Experience

Relentless focus on improving customer experience has led to great impact

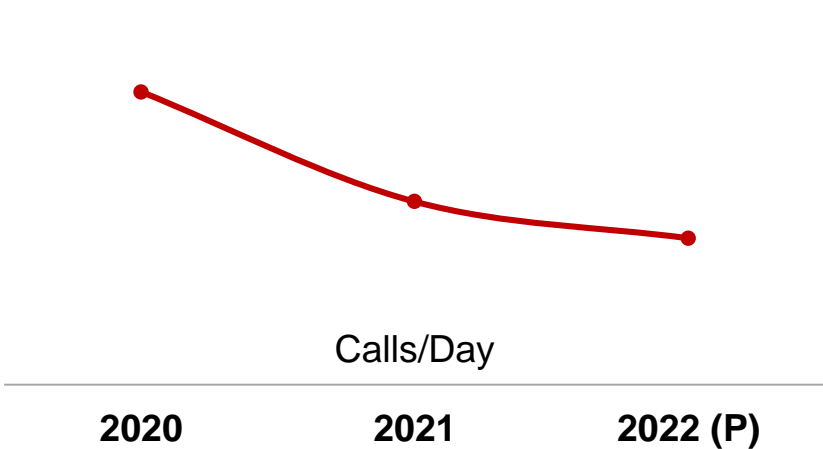


Impact of Digital on Customer Experience

40% Reduction in Network Complaints



50% Reduction in Non-Network Complaints

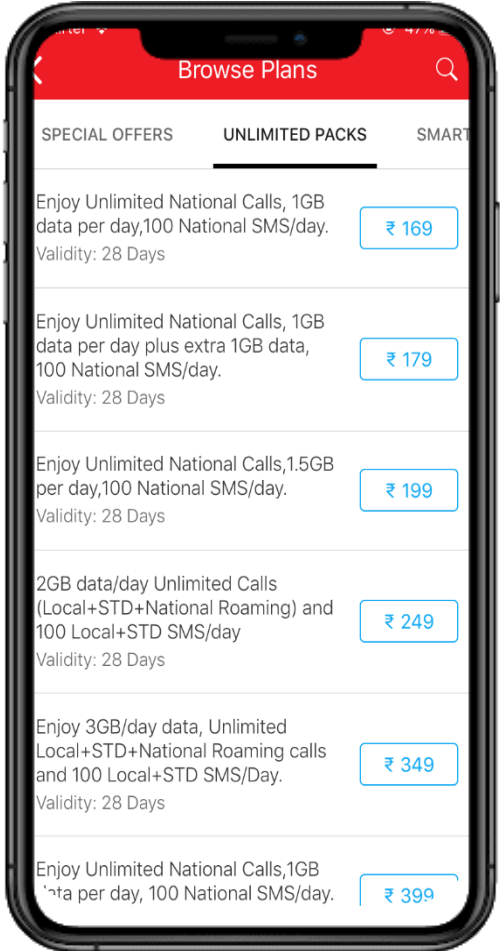


Digital Experience

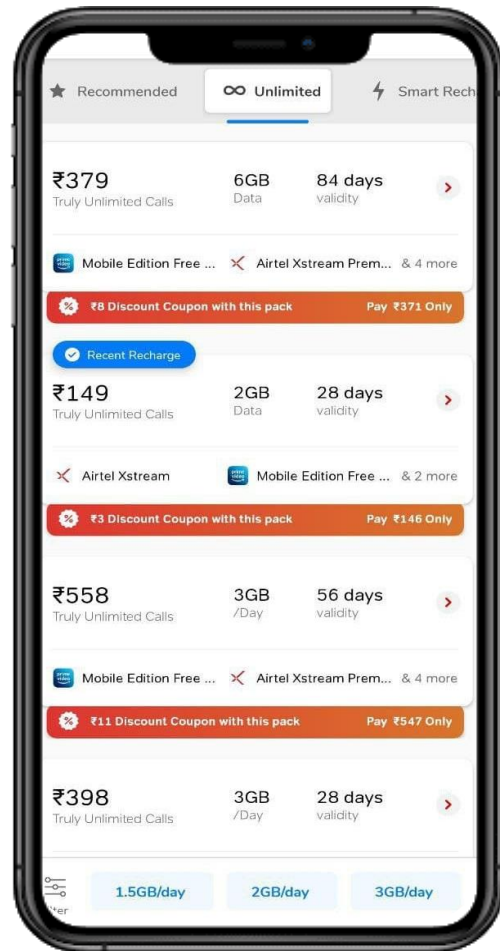
As an example, here is evolution of mobility recharge journey



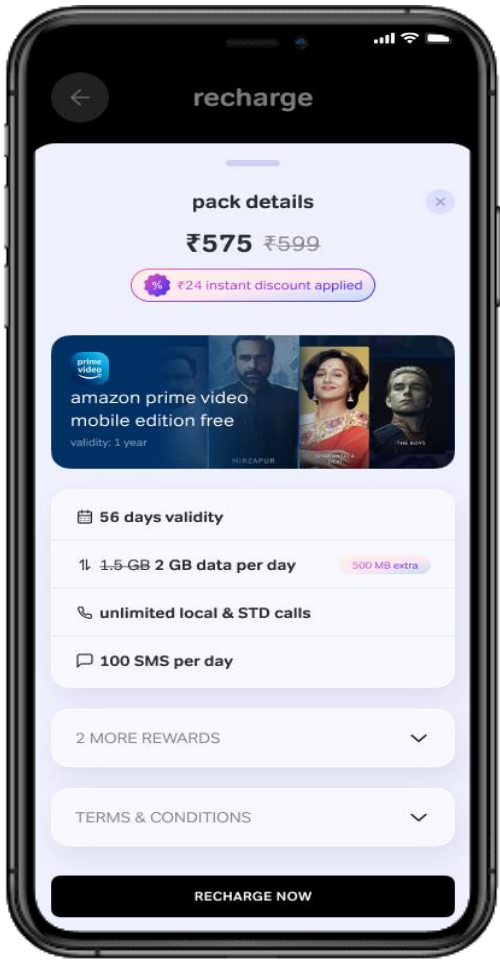
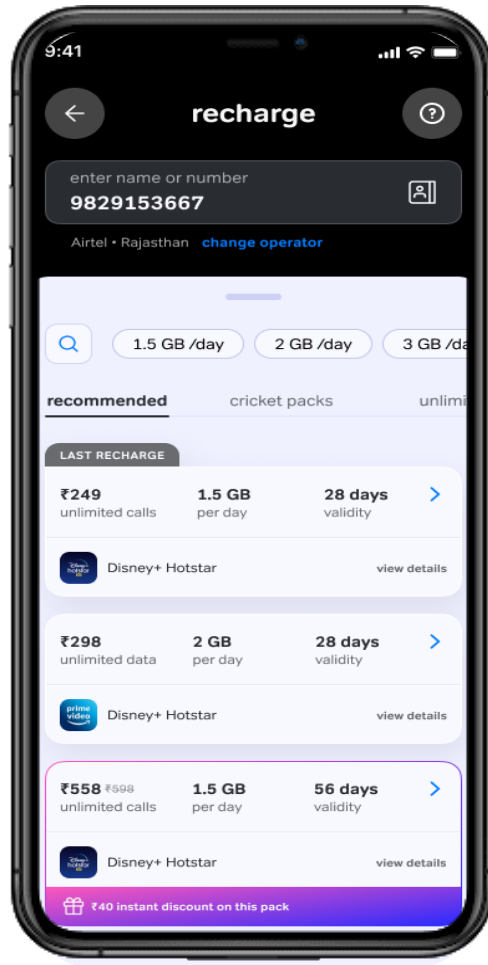
2019



2021



2022



Digital Experience

Airtel's customer experience strategy rests on 5 key pillars



5 pillars of customer experience strategy



Omnichannel

Meet our customers where they want to meet us.



Digital First

Empower customers to self serve on digital channels.



Purpose

Empower frontlines to delight our customers.



War on Failures

Proactively detect and structurally fix failures.

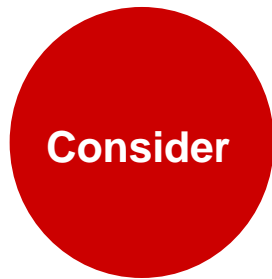
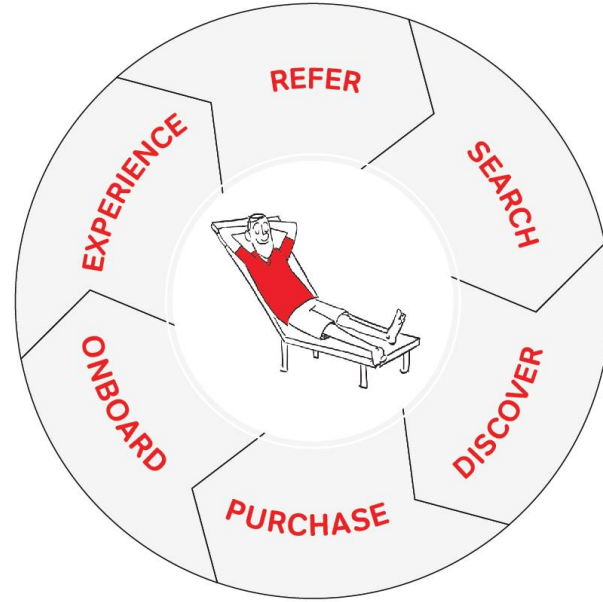


Open Telco

Transparently communicate with our customers.

Digital Experience

Omnichannel and Digital-first Customer Lifecycle



Search & Discover

Experience

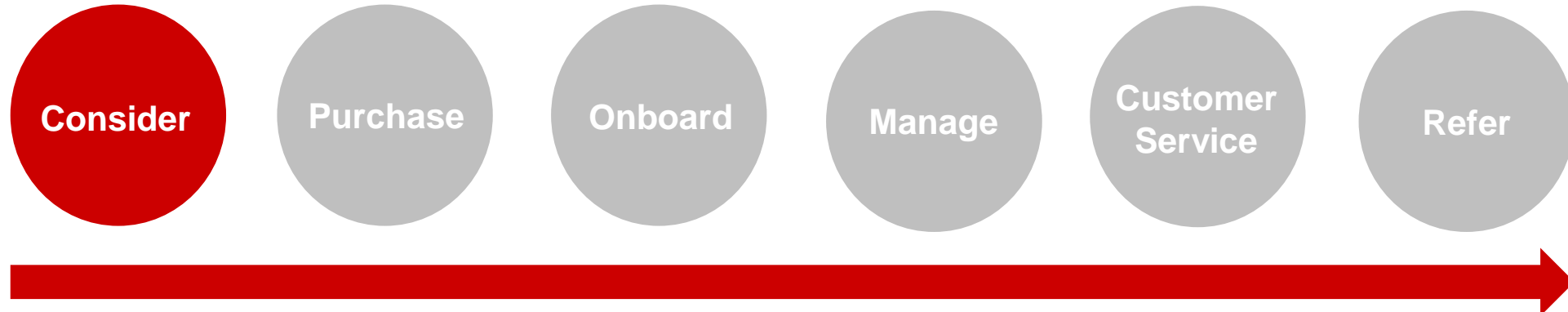


Digital Experience

Omnichannel and Digital-first Customer Lifecycle



Airtel Customer



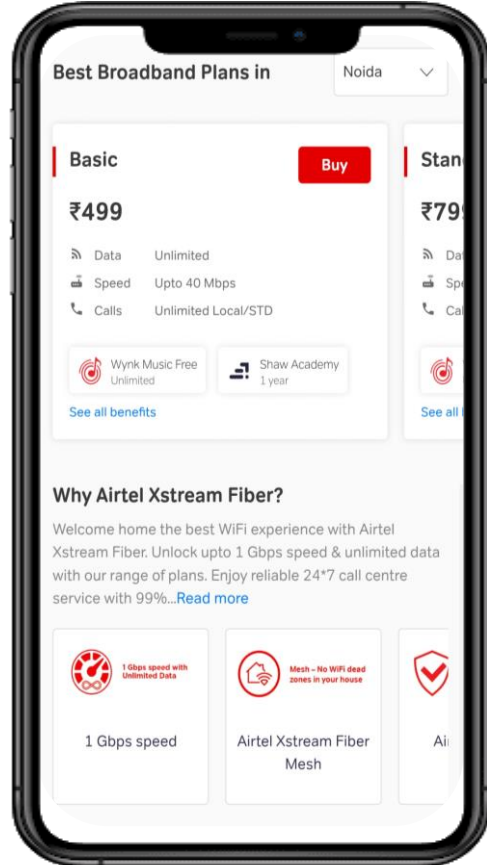
Consider

Illustrating with an example of Broadband product



Going omnichannel – Share of online acquisition of broadband has grown **3x** since 2018

Easy acquisition – Buying Broadband on Thanks App from Shop



Buying Broadband through any of our channels



Airtel Retail Store



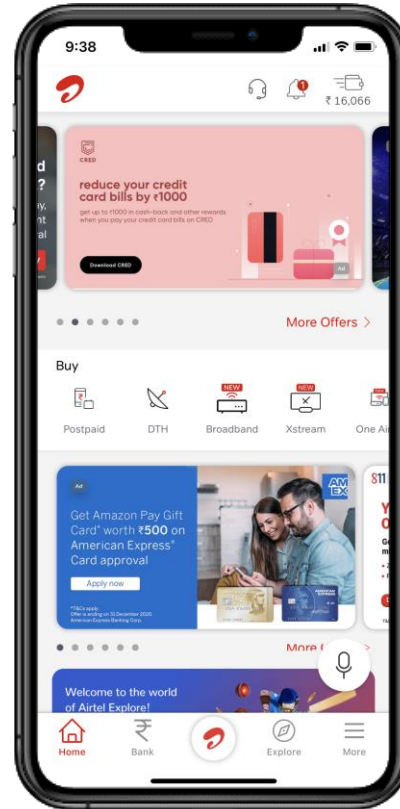
Airtel Contact Centers

Consider

Aspiration to make all our services omnichannel



Customers can **Start Anywhere** and **Finish Anywhere** across all Airtel Channels – Thanks App, Retail Stores or Contact Centers



Airtel Thanks App



Airtel Retail Store



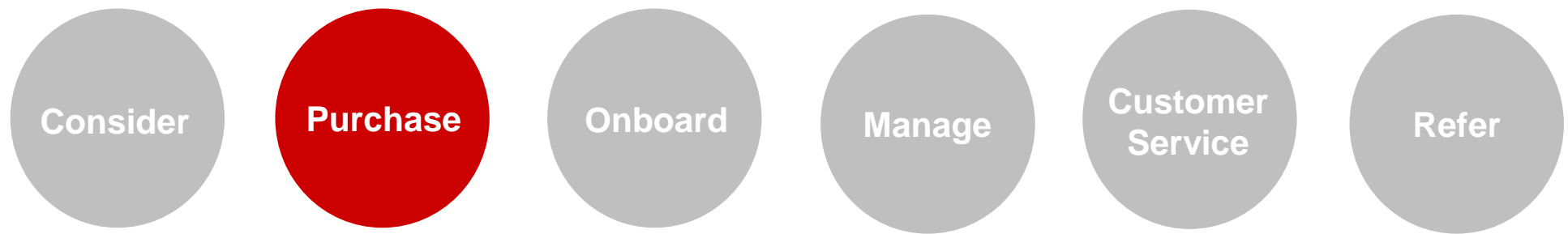
Airtel Contact Centers

Digital Experience

Omnichannel and Digital-first Customer Lifecycle

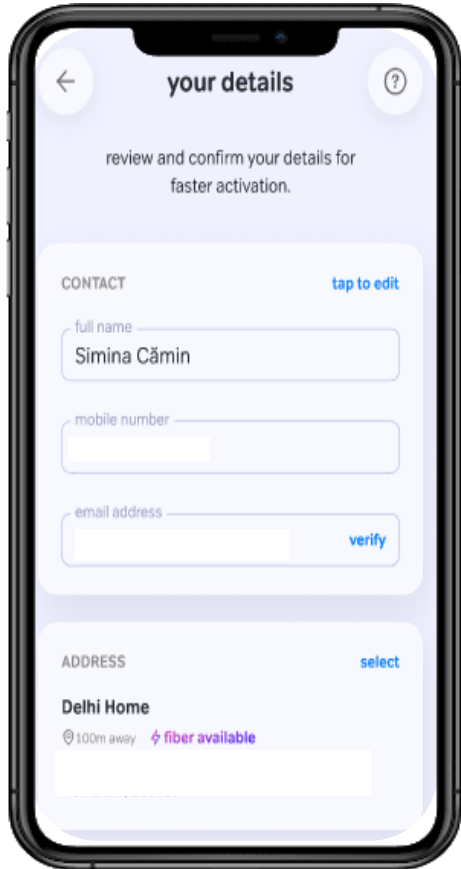


Airtel Customer

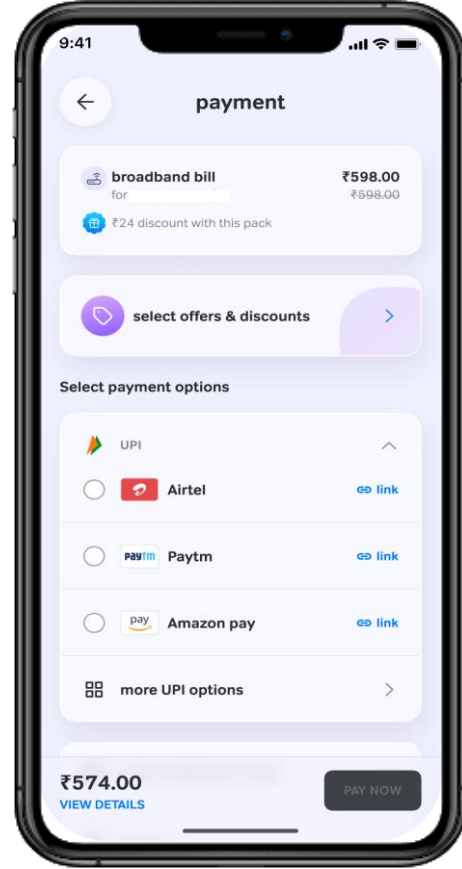


Purchase

Purchasing broadband is a seamless experience for customers



Customer enters details



Customer given payment options with all payment modes

Purchase

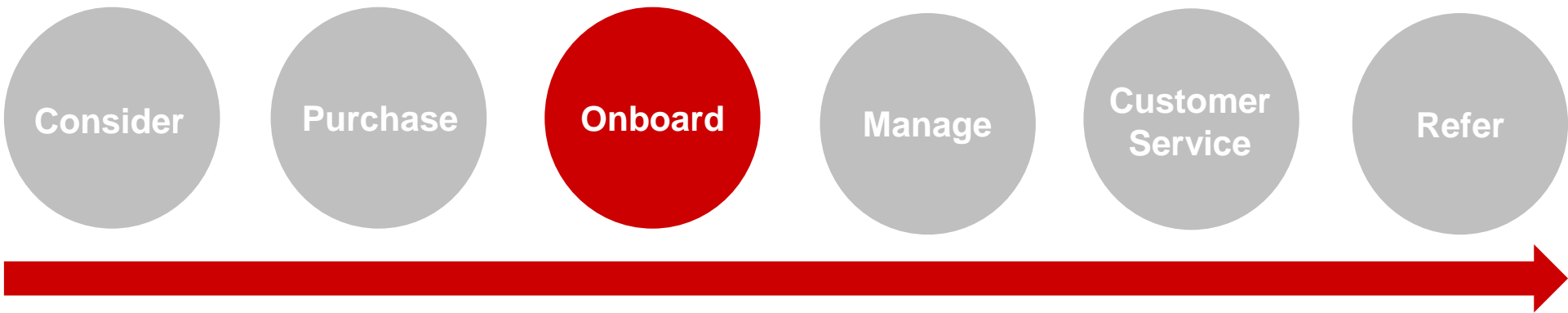
- Full-fledged payments page with access to **all payment modes**, offering a **personalized** payment journey.

Digital Experience

Omnichannel and Digital-first Customer Lifecycle



Airtel Customer

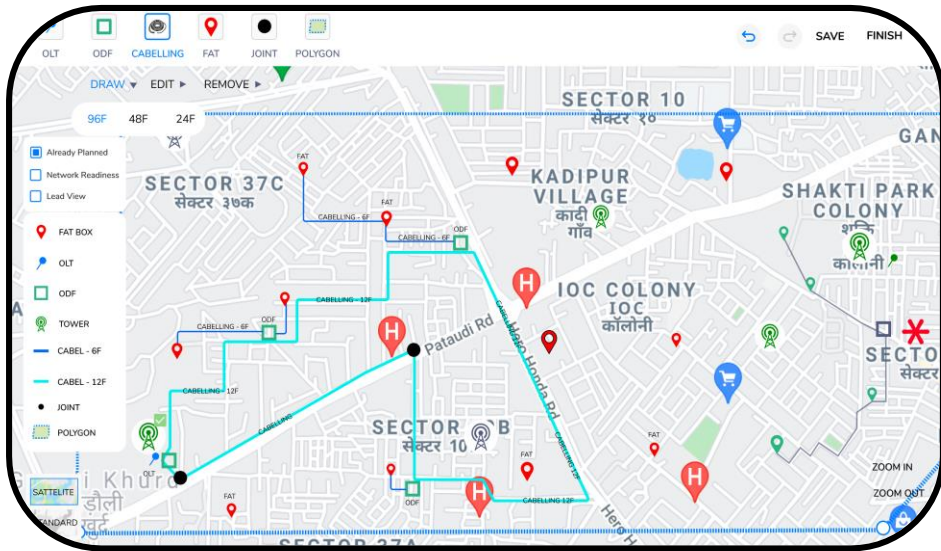


Installation

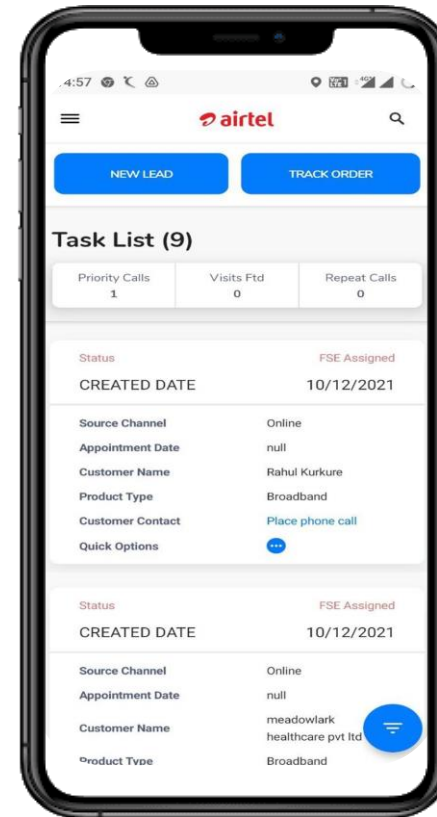
Broadband planning and installation using Airtel Work during onboarding of the customer



Digitizing our field forces with tools to improve **operational efficiencies by 30%**



Planning – Schedule and route optimization for our field forces



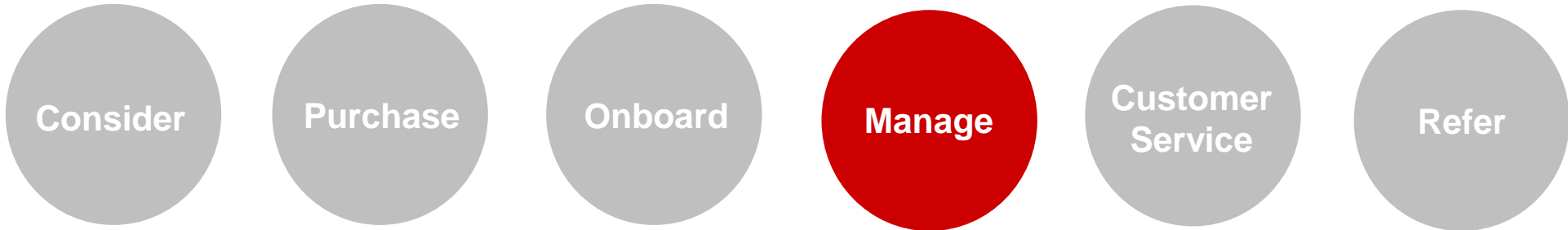
Installation – Installer receives instructions on the Airtel Work app

Digital Experience

Omnichannel and Digital-first Customer Lifecycle

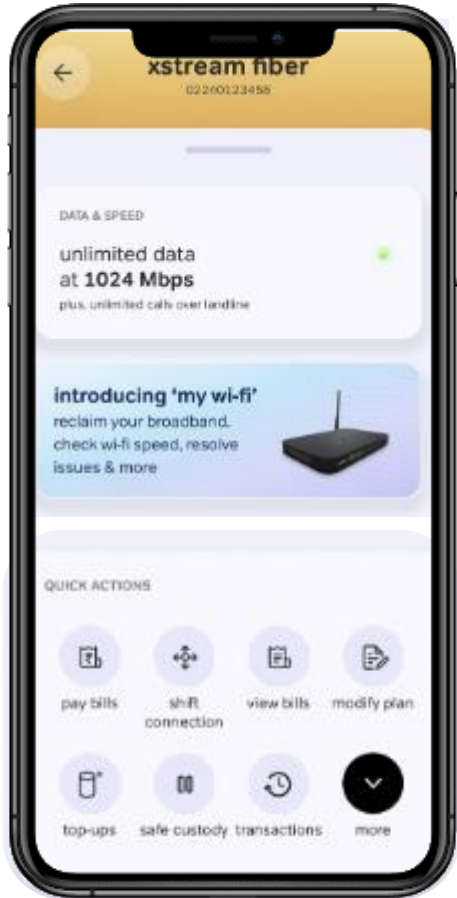


Airtel Customer

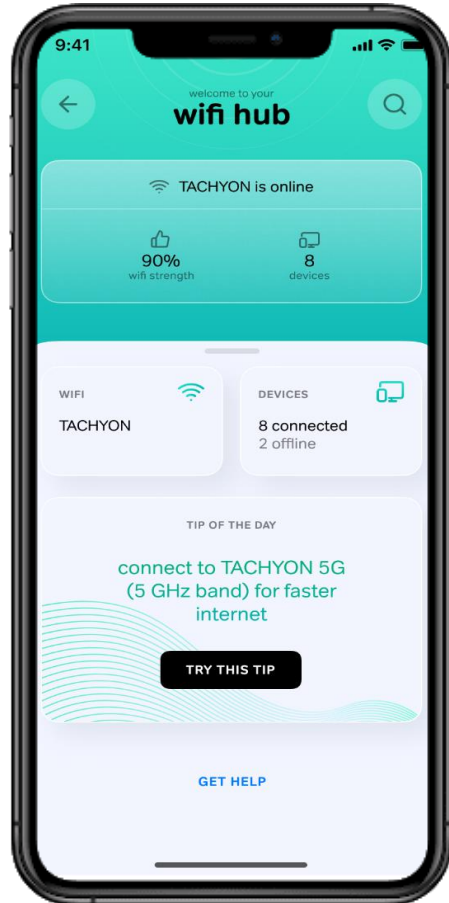


Manage

Creating a brilliant experience for broadband customers



Manage broadband account and make payments on app



Optimize broadband and troubleshoot any WiFi issues

WiFi Hub

13M+ customers interact with Manage everyday

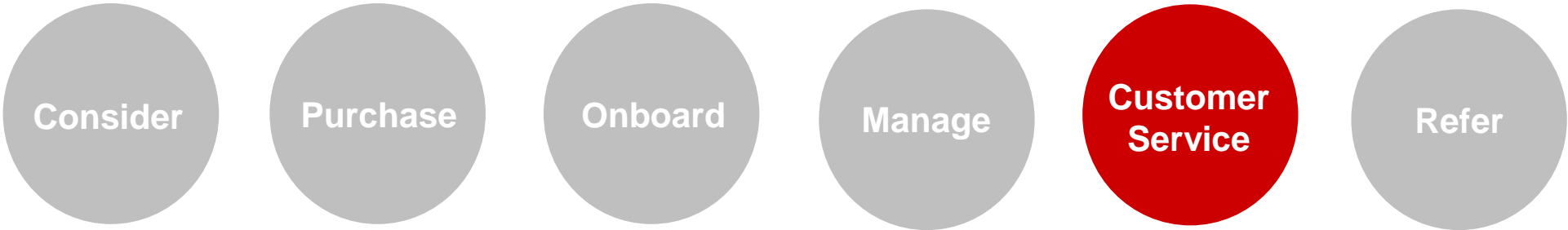
600K+ customers interact with WiFi Hub everyday

Digital Experience

Omnichannel and Digital-first Customer Lifecycle



Airtel Customer



Customer Service – Assisted

Customer experience has been transformed with the One Airtel Service Portal



Empowering our agents with **one view** of the customer, allowing to serve customers efficiently

One Airtel Service Portal

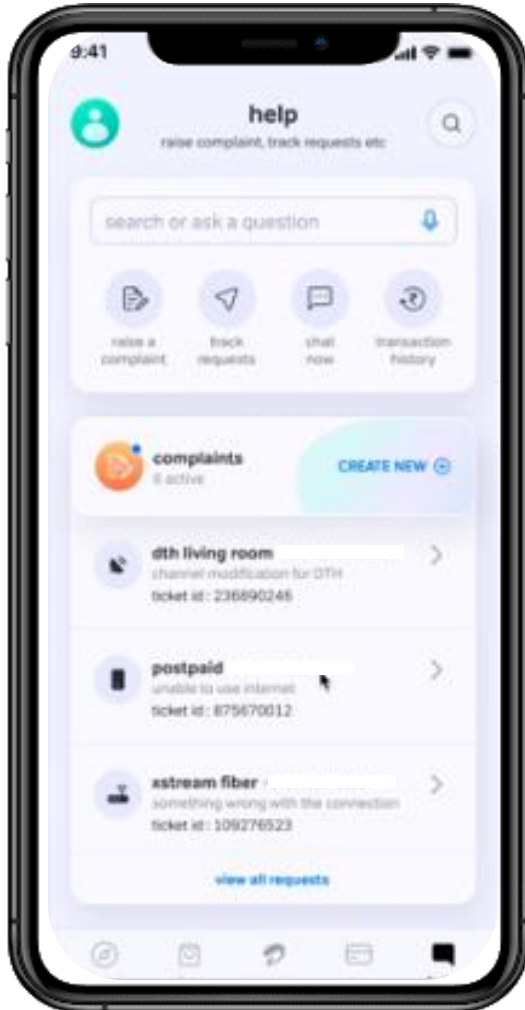
The screenshot displays the 'One DT' interface for a customer named Mr. Ranjit Chaddha (Platinum Tier). The interface is divided into several sections:

- Customer Profile:** Mr. Ranjit Chaddha, Platinum Tier. Interaction: Customer Care. Last called on: 16-Sep-2020, Yesterday. LOB: Postpaid. Call type: Account Update. Status: In progress.
- Plan Information:** airtelBLACK 1999 Plan. Benefits: InfinityFamily_698_Homes_PKG_15047.
- System Checks:** Do Not Disturb (DND) Activated, Airtel Thanks App Not Installed.
- Connection Summary:** Bundled (8), Postpaid (4), DTH (2), BroadBand (2), Non-bundled (4), Postpaid (0), DTH (2), BroadBand (0), Prepaid (2).
- Recent Bill:** ₹ 2358.82. Bill Date: 12 Mar 2020. Bill Period: 11 Mar 2020 to 12 Apr 2020.
- Amount Due:** ₹ 559.99. Pay By Date: 30 Mar 2020. After 30 Mar 2020: ₹ 677.99.
- Last Payment:** ₹ 698 Success. Paid on: 8 Feb 2020, 12:45 PM. Payment mode: Airtel Money.
- Service Requests:** A table with 3 requests for 'Proactive- CPE cleaning or replacement requi...' on 11 Sep 2020.

Service Request Title/ ID	Connection	Creation date	Type	Estimated completion
Proactive- CPE cleaning or replacement requi... 41752771937455739202		11 Sep 2020 04:40 PM	Fault repair request	11 Sep 2020 04:40 PM
Proactive- CPE cleaning or replacement requi... 41752771937455739202		11 Sep 2020 04:40 PM	Fault repair request	11 Sep 2020 04:40 PM
Proactive- CPE cleaning or replacement requi... 41752771937455739202		11 Sep 2020 04:40 PM	Fault repair request	11 Sep 2020 04:40 PM

Customer Service – Self Serve

Did not stop at Assisted. Transformed 'Help section' on the app, enabling Self Serve



Help Section on Thanks App

Help Section

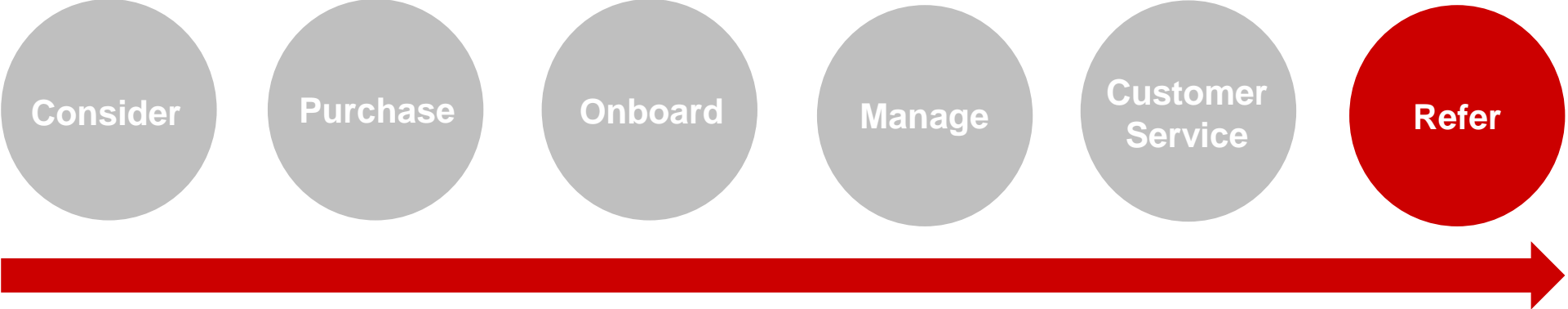
- New UI/UX provides **ease of accessibility** to **raise new** and **track existing** broadband complaints.
- Revamped **chat feature** for customers to get instant resolutions to their queries.

Digital Experience

Omnichannel and Digital-first Customer Lifecycle



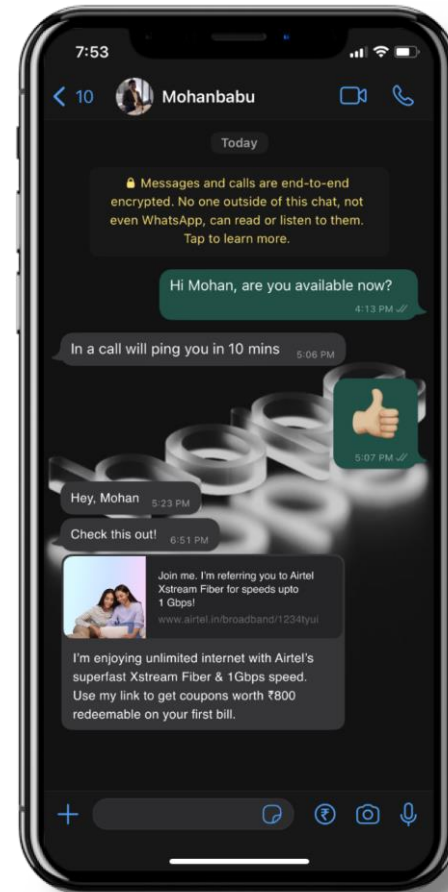
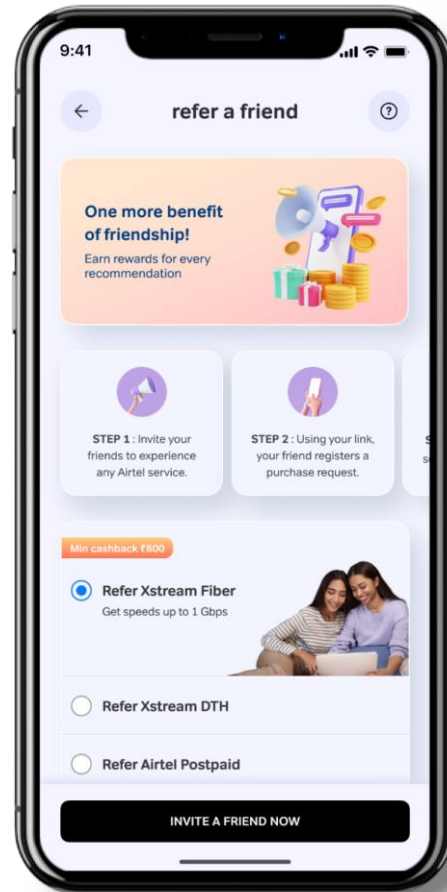
Airtel Customer



Refer Referral Program



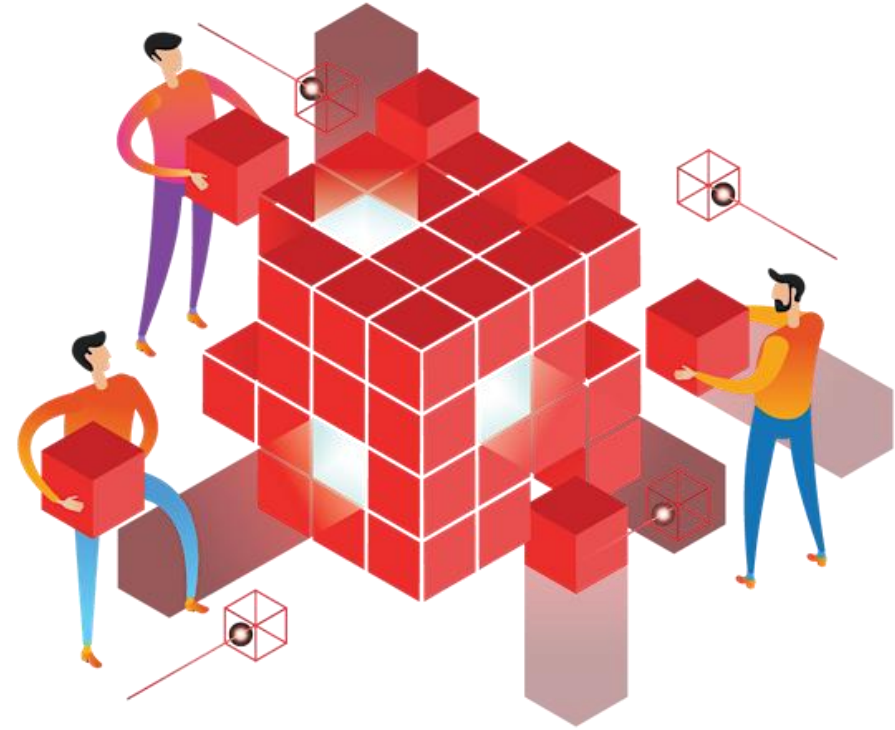
A referral program where customers can refer our services



Our Objective

Reimagine Airtel for a future-ready and brilliant customer experience...
where **every customer** is a **fan** of Airtel and is **referring** our services

Digital Services





Digital Stack & Capabilities

Airtel Digital Stack

Capabilities We Have Extracted

Digital Infrastructure

- B2B Distribution: 3.5K+ Enterprises & 1M+ SMBs
- B2C Distribution: 350M+ Customers & 184M+ Digital MAU
- **Data:** 4K+ Databases, 338K+ KM of Fiber & \$46B of investments
- Pay Infrastructure

Capabilities Deep Dive

Digital Infrastructure – Data



Data as a capability is core to a Digital Telco

Our Scale



11
Data Centers



4K+
Databases



2T+
Records
Processed Daily



AI-Ops



Cloud 3.0
Self Service
Capable

Capabilities Extracted

- Customer 360 (Cohorts for Targeting)
- AI and ML Recommendation Engine
- Telco Scores: Credit, Fraud
- Respond to real-time events
- Scalable and Elastic
- End-to-end Observability
- High service reliability across customer journeys



Digital Stack & Capabilities

Airtel Digital Stack

Capabilities We Have Extracted

Digital Experience

Digital Infrastructure

- Omnichannel
- Search-to-Refer Customer Cycle

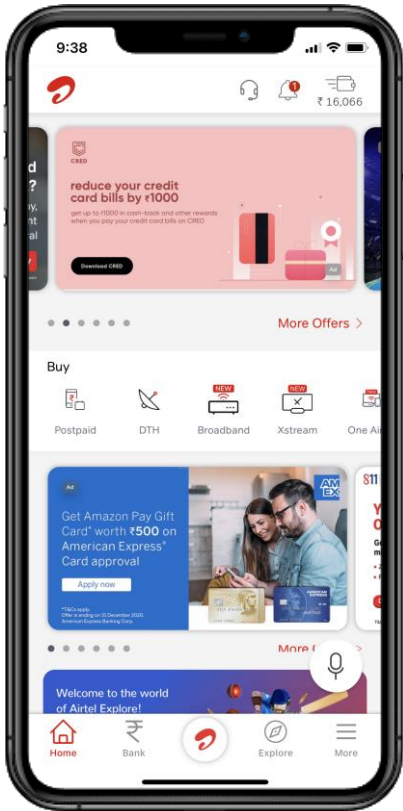
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- Data: 4K+ Databases, 338K+ KM of Fiber & \$46B of investments
- Pay Infrastructure

Capabilities Deep Dive

Digital Experience – Omnichannel & Search-to-refer Customer Cycle



Omnichannel customer touchpoint for our 350M+ customers



Airtel Thanks App



Airtel Retail Store

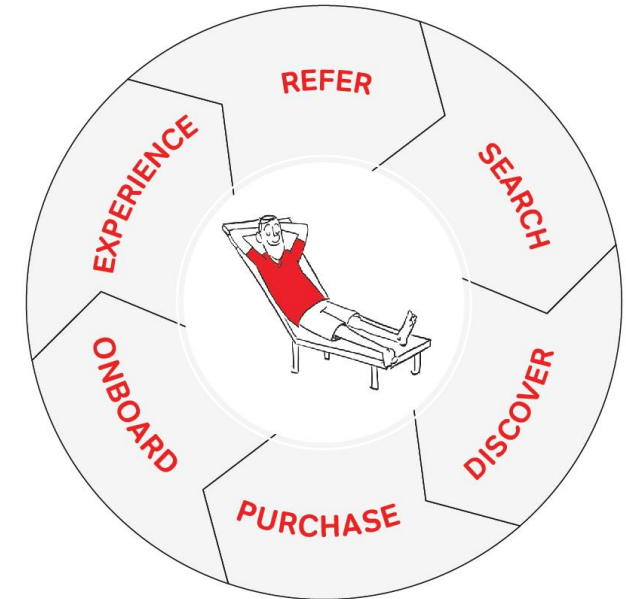


Airtel Contact Centers



Store & Mitra

Search-to-refer Customer Cycle



Digital Stack & Capabilities

Airtel Digital Stack

Digital Services

Digital Experience

Digital Infrastructure

Capabilities We Have Extracted

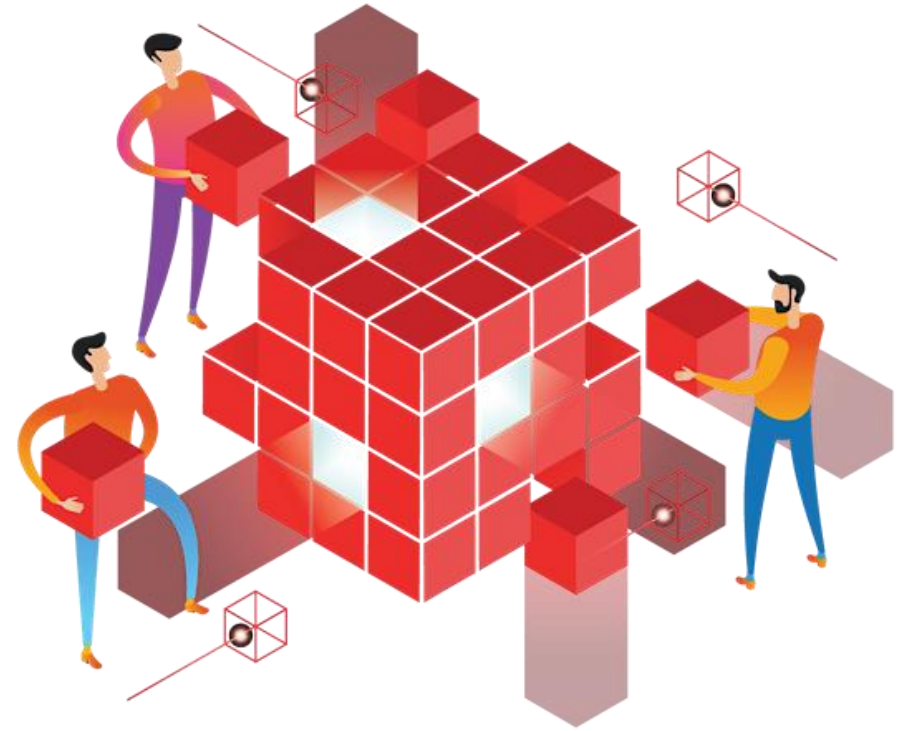
Digital Marketplace
(Wynk, Xstream,
Loans and Credit Card)

Digital Banking

- Omnichannel
- Search-to-Refer Customer Cycle

- B2B Distribution: 3.5K+ Enterprises & 1M+ SMBs
- B2C Distribution: 350M+ Customers & 184M+ Digital MAU
- Data: 4K+ Databases, 338K+ KM of Fiber & \$46B of investments
- Pay Infrastructure

Airtel Ads



Airtel Ads

What is Airtel adtech?



A first party platform that connects **brands** to **consumers** via Airtel's assets

135+ Brands



Airtel Ads Tech Stack

350M+ Airtel Customers



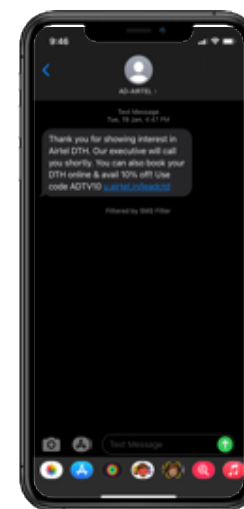
Airtel Thanks



Wynk Music



Xstream Video



SMS



Airtel DTH

Airtel Ads

Unpacking the tech stack



Demand

airtel ads

Let's talk

I am a brand ▼
looking to build brand awareness ▼

Name*

Email Address*

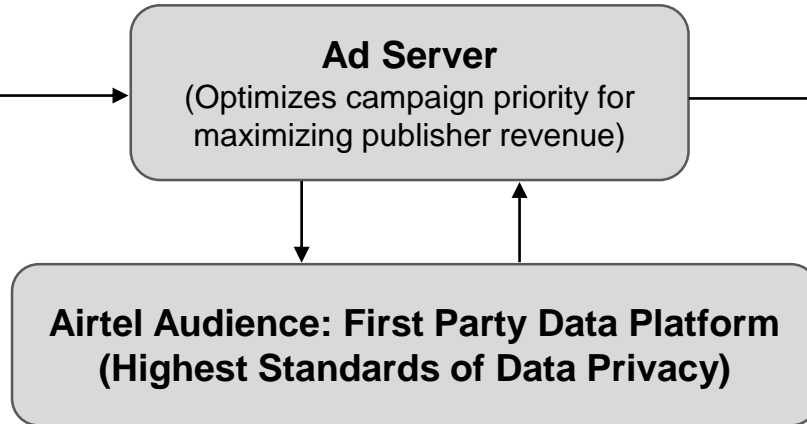
Mobile Number

Company Name*

Advertiser's Designation*

Brands that want to Advertise

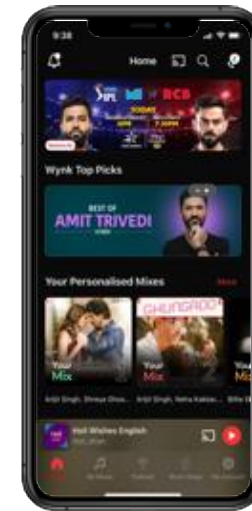
Digital Technology



Supply



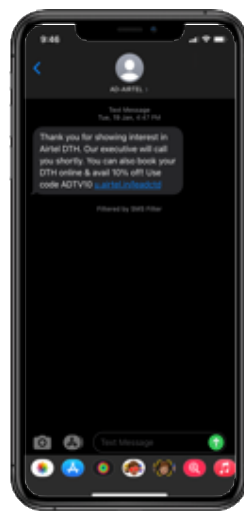
Airtel Thanks



Wynk Music



Xstream Video



SMS



Airtel DTH

Airtel Ads

Launched and received great response from the market



mint

Bharti Airtel launches advertising platform



Deal is part of Airtel's strategy to consolidate its customer facing products and biz.reuters

2 min read . Updated: 25 Feb 2021, 12:35 AM IST

Ishita Guha

Airtel Ads will enable brands to curate consent-based and safe campaigns for subscribers of the telco

Airtel launches ad tech platform to tap \$10 bln digital advertising market

"Airtel Ads allows brands of all sizes to curate consent based and privacy safe campaigns to one of the biggest pool of quality customers in India," a statement issued by the company said on Wednesday.

Airtel acquires strategic stake in blockchain-as-a-service company Aqilliz

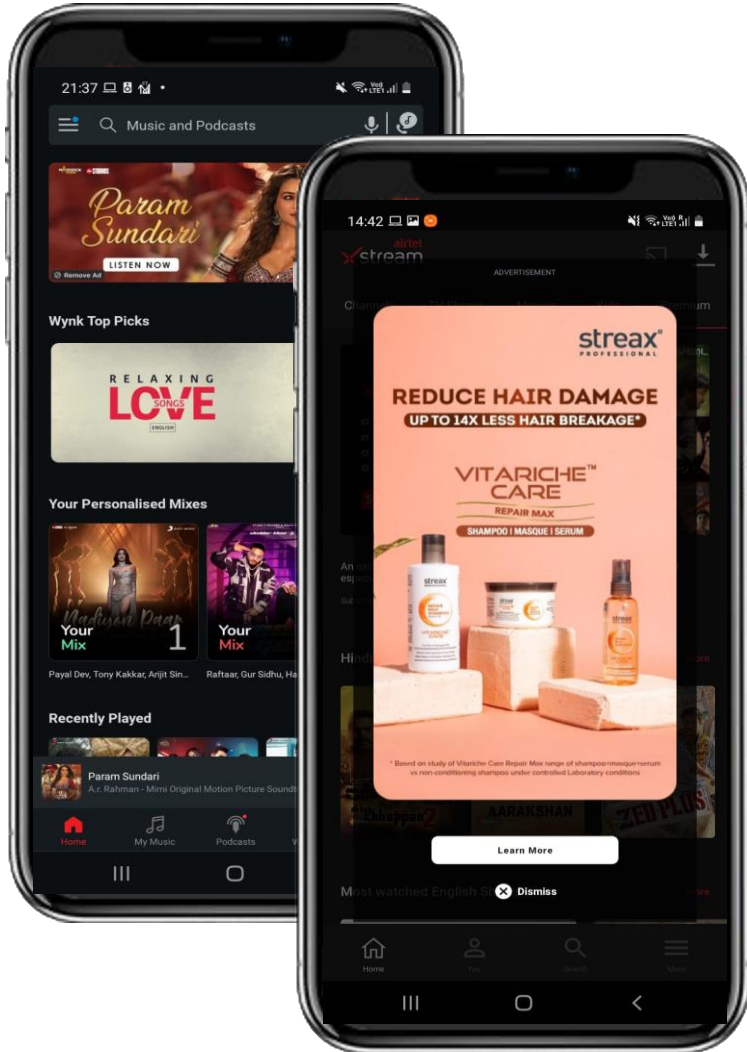
"Blockchain technology is maturing and we see its application across areas such as Adtech, Creator Economy, and Loyalty Programs. We are thrilled to have Aqilliz join our Startup Accelerator Program and be part of Airtel's digital innovation factory,"

ETTelecom • February 24, 2022, 11:00 IST

Airtel Ads



Had a good start. It is time to go after a much larger opportunity



Highlights

1,000+
Campaigns delivered
successfully in FY'22

135+
Premium brands
served in FY'22

- Serving premium brands across 35+ industries such as FMCG, Gaming, OTT, Financial Services, etc.

Opportunity Areas

Demand Ownership & Acceleration

Supply Growth

Advanced Personalization & Targeting

New Products

Growth Plan

- Investing in an agency and direct sales team.
- Investing in growing our supply to cater to the growing market demand.
- Investing in data science capabilities to build better cohorts and improve audience targeting.
- Investing in developing deeper customer insights to become a planning tool for advertisers, helping brands with media planning.

Airtel IQ



Airtel IQ – A Unified Customer Engagement Platform

Voice

Call Masking, Toll Free, Dialer, SEBI
Call Recording

Messaging

Send SMS, CLI Manager,
Secure SMS, WhatsApp

Video

Stream, Call, Analytics

Contact Centre

IVR, Email, Social, Voice Analytics,
Chat Bots

Enabling enterprises to deliver unparalleled customer engagement across Voice, Messaging and Video programmatically

Our cloud communication suite that helps **businesses** transform their **customer engagement**

Swiggy leverages Airtel IQ's call masking services to enable its customers, restaurants and delivery agents to talk to each other in a privacy safe and secured manner



Delivery Agent

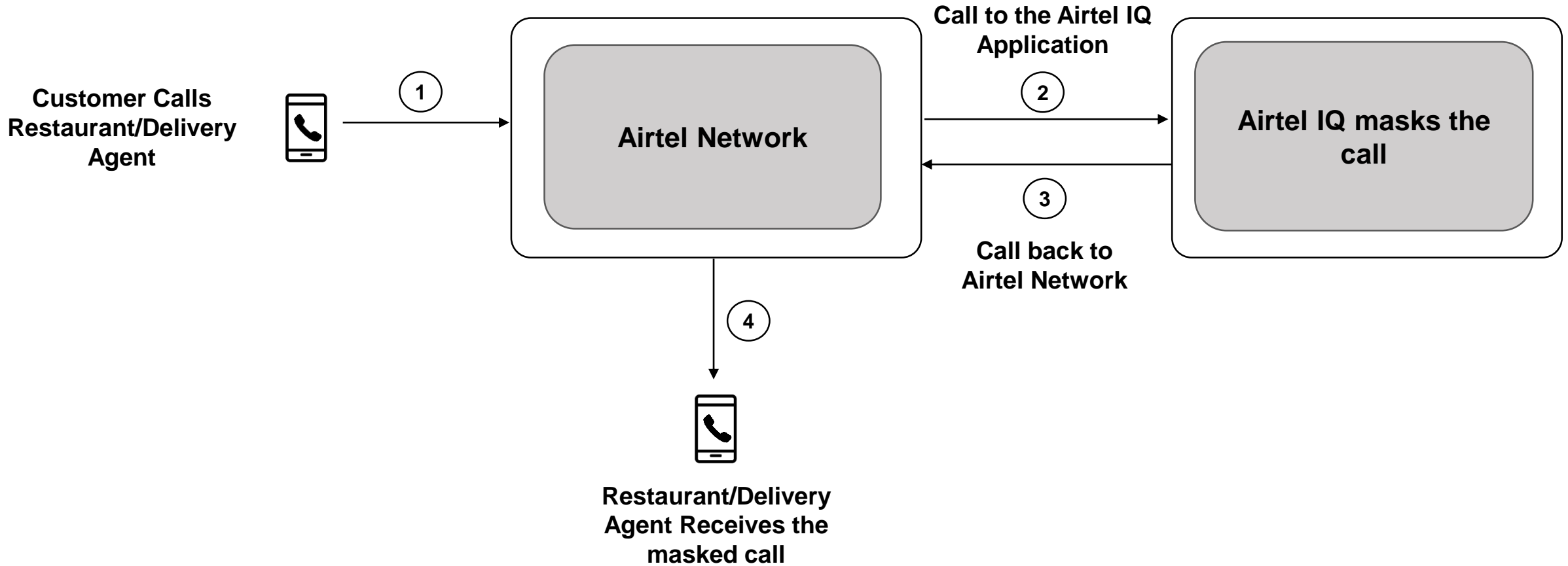


Customer



Airtel IQ

Unpacking the tech stack



Airtel IQ

Launched and received great response from the market



Bharti Airtel enters cloud communications market, launches 'Airtel IQ'

The Indian cloud communications market, estimated at USD 1 billion, is seen growing nearly 20 per cent annually

Topics

Bharti Airtel | Cloud computing

mint

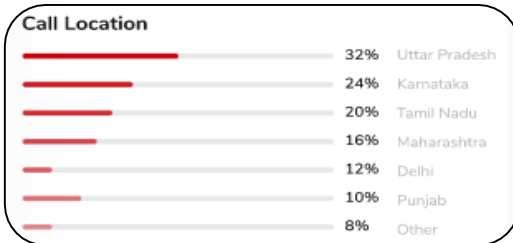
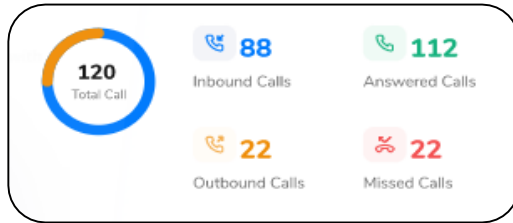
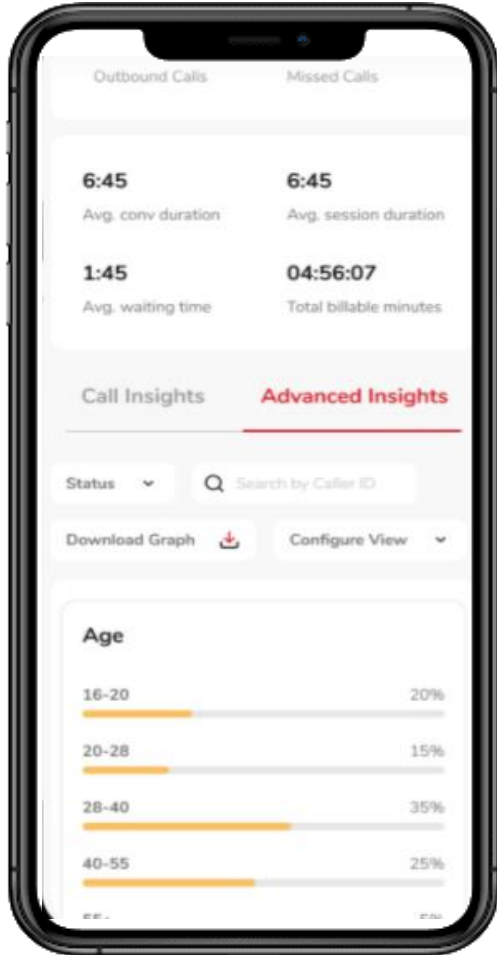
[Home](#) / [Industry](#) / [Telecom](#) / Airtel launches cloud communications platform for business...

Airtel launches cloud communications platform for businesses



Airtel launches 'IQ Video' as one stop solution for OTT content developers

Airtel IQ Video brings an easy-to-use platform that can enable anyone to quickly build and scale their business in video streaming.



Highlights

185+
Enterprise
customers live in FY'22

- Multiple use cases such as interoffice telephony, phone commerce and fleet management are driving growth of voice minutes.
- Using IQ's omnichannel messaging capabilities, organizations are able to achieve their goals on Customer Lifecycle Management and Hyperlocal Marketing.

Opportunity Areas

Extraction from Existing Customers

Product Bundling

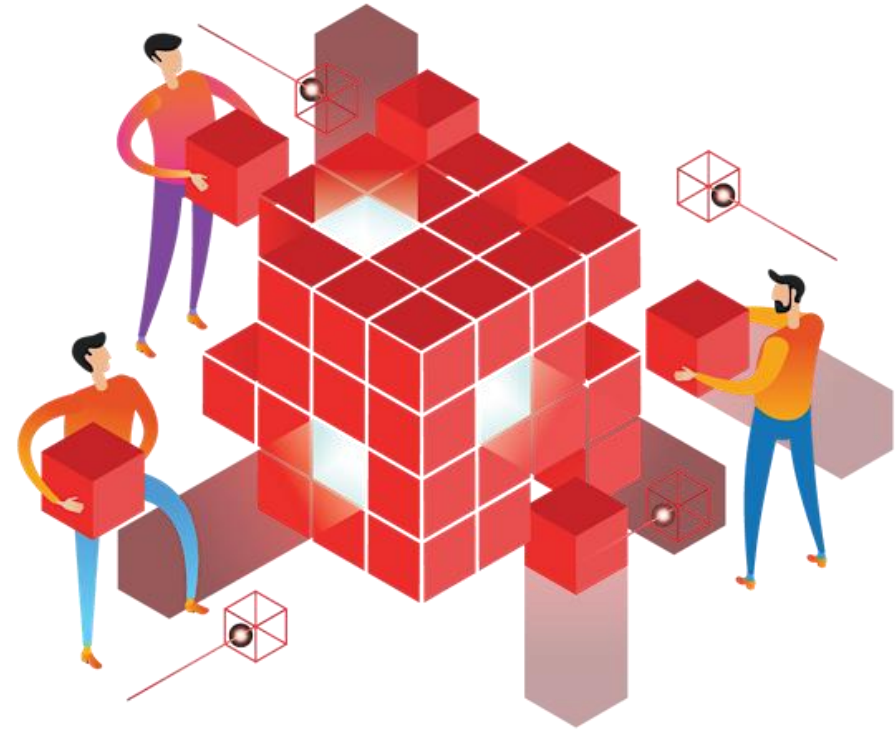
Product Stack Stability

New Products

Growth Plan

- Instituting processes for account based marketing to enable customer-level revenue extraction.
- Investing in creating omnichannel suites for customer experience across voice, video and messaging.
- Extend into SMB segment.
- Investing in tech towards building a reliable and low latency platform for continued and a seamless customer experience.
- Investing to bring industry-first products to market such as SIM-based recording, Video IQ, etc.

Digital Marketplace





Digital Marketplace


What is Digital Marketplace?



350M+ Airtel Customers


184M+
Digital MAU


90M+
Music & video streamers


50M+
Gaming champs


50M+
Shopaholics


30M+
Frequent fliers


25M+
Foodies

Marketplace Tech

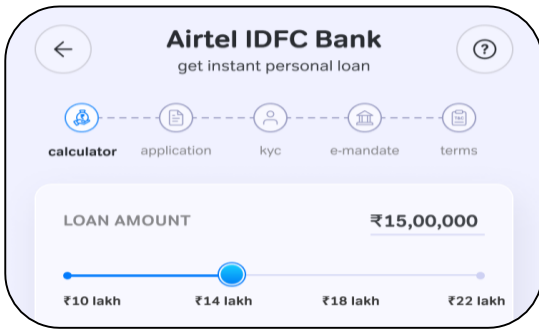
Our Products



Wynk Music



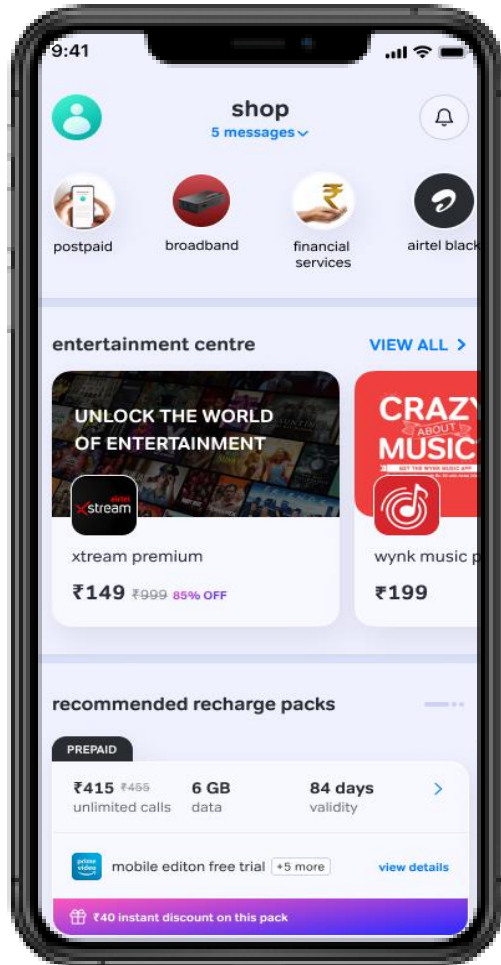
Airtel Xstream



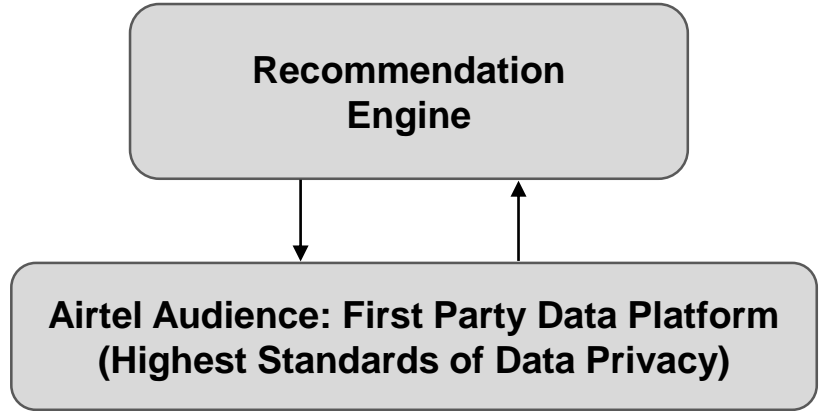
Airtel Loans



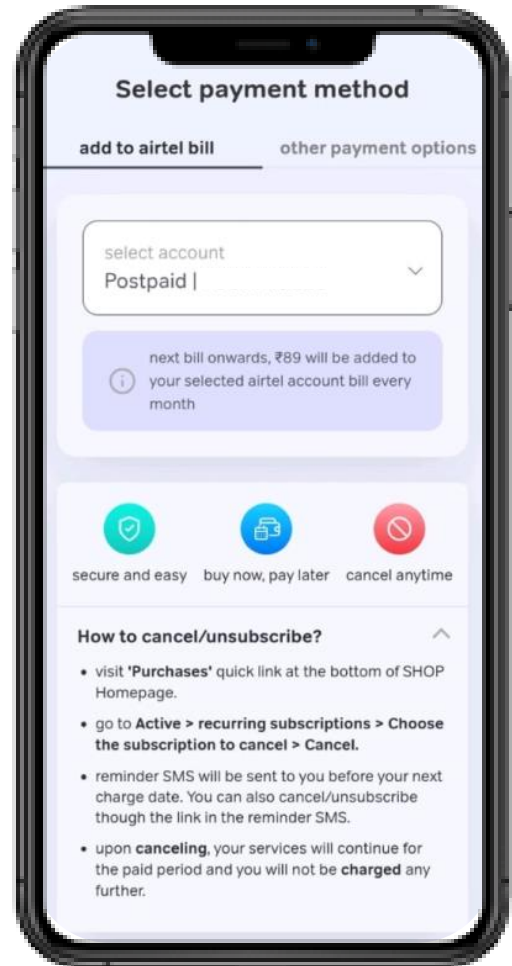
Airtel Credit Card



Listing on Shop



Digital Technology



Add-to-Bill

Digital Marketplace

Product Demos



Wynk Music



Airtel Xstream



Airtel Loans



Airtel Credit Card

Digital Marketplace

Received great response from the market

Wynk Music Is The Rising Star Of India's Music Streaming Apps

Launched in 2014 as a free service for Airtel subscribers, Bharti Airtel-owned Wynk Music is one of the pioneers in the music streaming space and enables users to download and listen to songs offline.

Currently, Wynk's premium service is the cheapest in the market, priced at INR 49/month and INR 349/year for an ad-free music experience.



Home / Companies / News / Axis Bank, Bharti Airtel to issue co-branded credit card

Axis Bank, Bharti Airtel to issue co-branded credit card



Airtel Axis Bank Credit Card users will get rewards on their card spends on mobile/DTH recharges, Airtel Black and Airtel Xstream Fiber payments, cashback on electricity/gas/water bill payments etc. Photo: iStockphoto

Bharti Airtel unveils 'Xstream Premium', eyes 20 mn paid users

Press Trust of India

feedback@livemint.com

NEW DELHI: Telecom operator Bharti Airtel on Thursday announced a new video streaming service, Airtel Xstream Premium, that brings together content from 15 popular video apps, with single subscription at an introductory price of ₹149 a month.

Airtel is eyeing 20 million new users for this paid offering, according to Adarsh Nair, CEO of Airtel Digital. The Airtel Xstream Premium offering aggregates content from 15 Indian and global video OTTs in one app, the company said in a statement. Customers will get access to a large catalogue of over 10,500 movies and shows as well as live channels from SonyLIV, ErosNow, Lionsgate Play, Hoichoi, ManoramaMax, Shemaroo, Ultra, HungamaPlay, EPICon, Docubay, DivoTV, Klikk, Nammaflix, Dollywood, Shorts TV on Airtel Xstream Premium.

Xstream Premium is a completely revamped version of its previous content offering that was free. Users can access Airtel Xstream Premium across mobiles, tablets, laptops through the app or web, and on the TV through the Xstream set-top-box. For now, it will be available only to Airtel users.

It will offer a single app, single subscription, single sign-in, unified content search and Artificial Intelligence driven personalised curation for each user. "These content are available exclusively to Airtel customers at... ₹149 per month," the statement said.

According to Media Partners Asia, by 2025, India's OTT (Over-The-Top) subscription market is expected to grow to \$2 billion, from the current \$500 million. A large proportion of new subscriptions are likely to come from users in smaller cities.

"Airtel Xstream Premium is a game-changing innovation to democratise OTT content in India," Nair said.

Digital Marketplace

Had a good start. It is time to go after a much larger opportunity



Highlights

70M+

MAU of Wynk Music

600K+

Paid subscribers added on Xstream in just 1 month of launch

- **Loans:** Industry-first proprietary lending model, providing **best-in-class customer experience**.
- **Credit Card:** Industry-first co-branded credit card with offers such as 25% off on Mobility, Broadband and DTH bill payments, 10% off on utility spends (Electricity/Gas) and 10% off on Ola, Swiggy, BigBasket and Zomato.

Digital Marketplace

Key opportunity areas and growth plan



Opportunity Areas

Demand Acquisition

Supply Growth

Tech Investments

Growth Plan

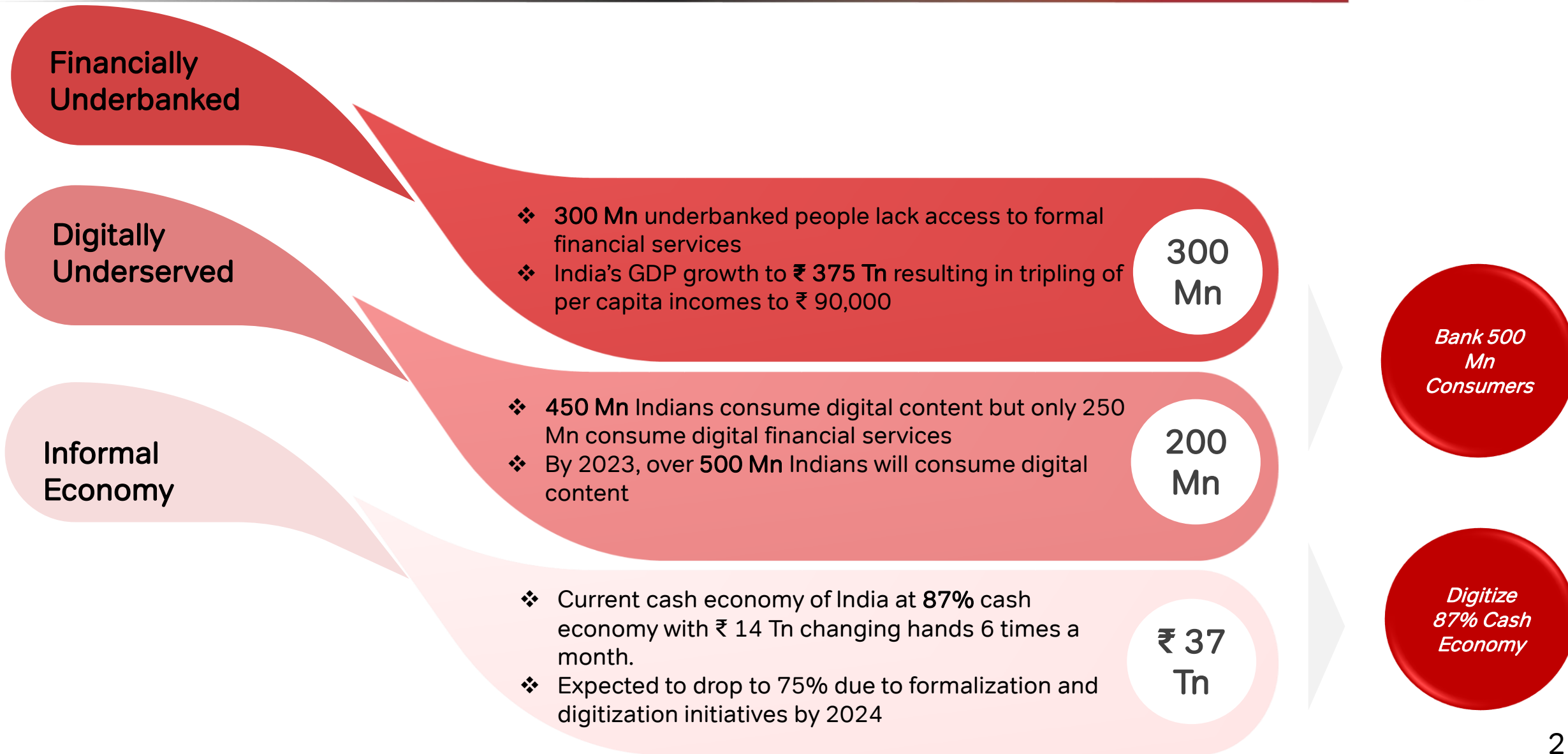
- Full exploitation of our distribution channels to ensure wide consideration and adoption of marketplace products.
- Add more music, video OTT, financial services (Banks, NBFCs) companies to fuel supply. Additionally, scale our creator economy play for music and video.
- Investing in tech towards building a better recommendation engine, improved payment systems (success rates) and enabling add-to-bill.



Airtel Payments Bank

25th March 2022

500 Mn Customers Opportunity



Unique Model



Differentiated Banking License

- License to accept customer deposits
- Multiple revenue streams



Distribution

- Access to over 1M telecom retailers
- Aadhaar enabled financial services



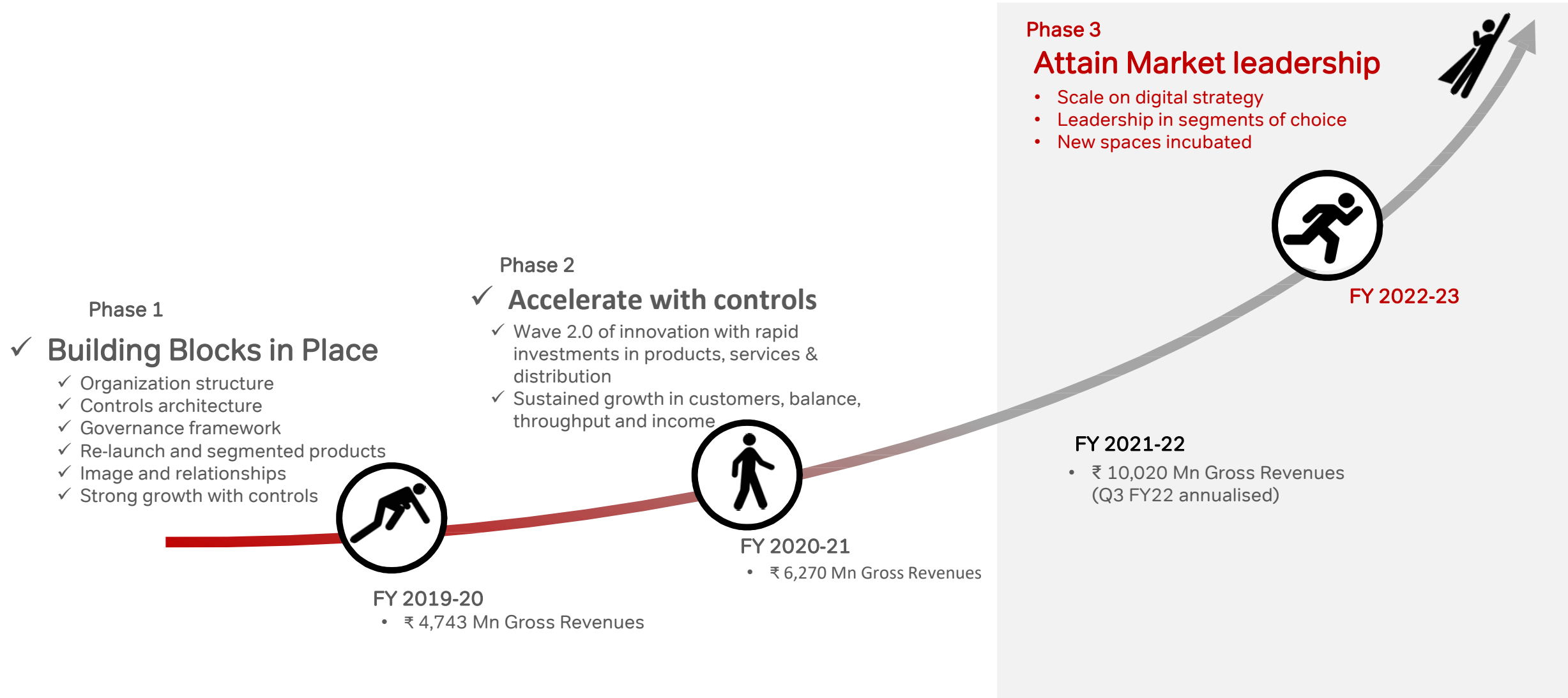
Digital Assets

- 184M unique users across digital assets
- India's largest B2B app for retailers



Consumers

- 350M Airtel user base
- Unique model to engage, upgrade and monetize



Businesses – Diversified

A Profitable Bank in FY22

Underbanked Space



Become the largest bank for the underbanked in the world by creating a network of banking outlets

Digital Space



Serve the digitally savvy customer through a dedicated section on Airtel Thanks App

Institutional Space



Help business partners digitize small ticket cash transactions

Technology

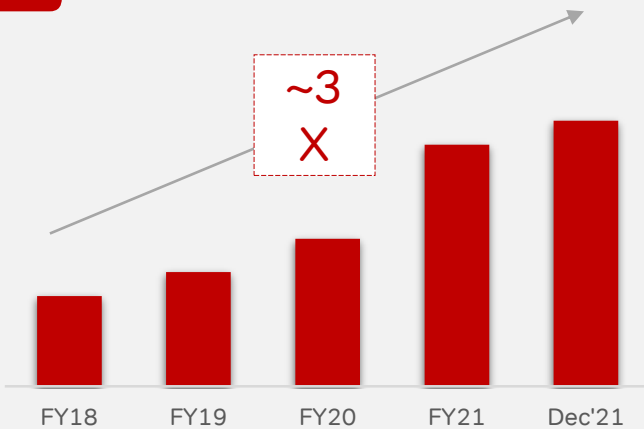
People

Controls

Businesses – Large and Growing

1

Bank of choice for Tier III+

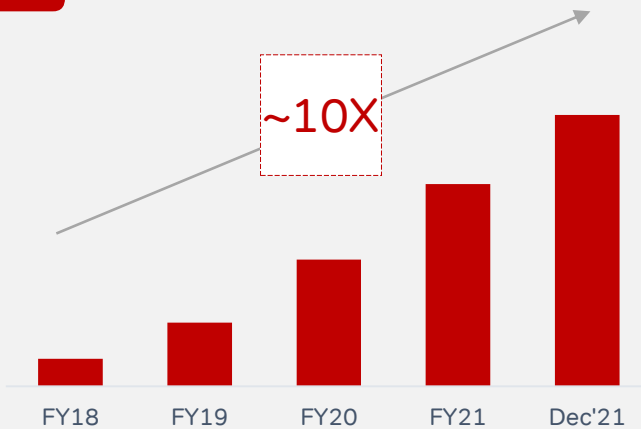


Underbanked users

- Over **3L** banking points in Tier 5/6 Villages
- Banking **1 in 6** villages across India

2

Rapidly growing digital bank

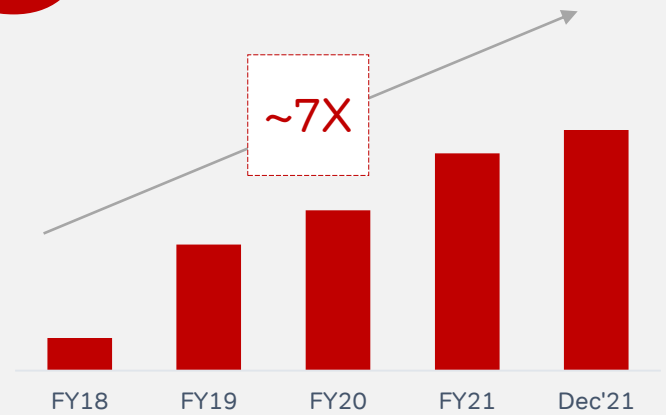


Digital users

- Digital consumer balances **doubled** Y-o-Y
- ~ **80%** growth in digital transactions Y-o-Y

3

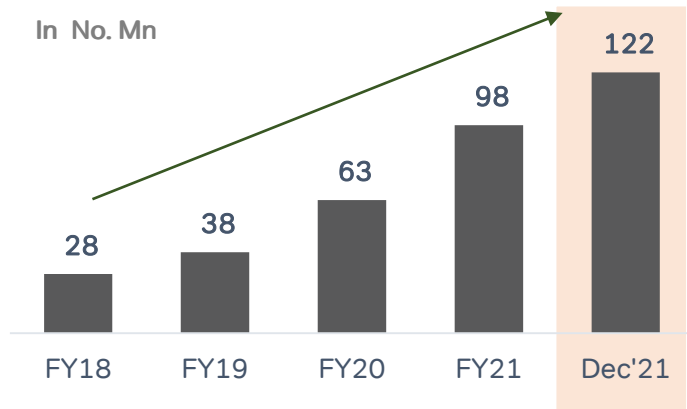
Largest micro cash player



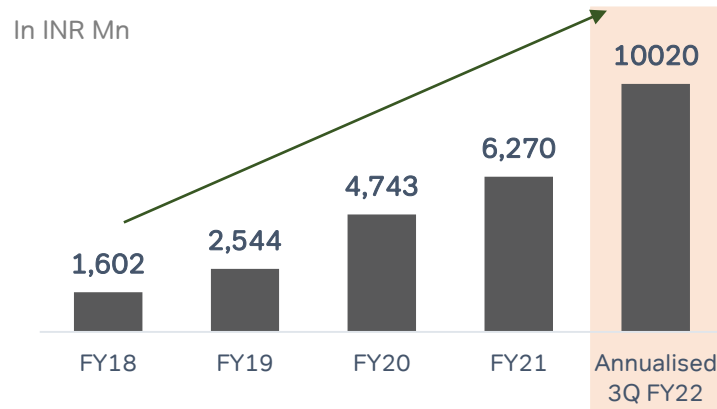
Institutional flows

- **Double digit** growth Y-o-Y
- Over **2,000** B2B Partners

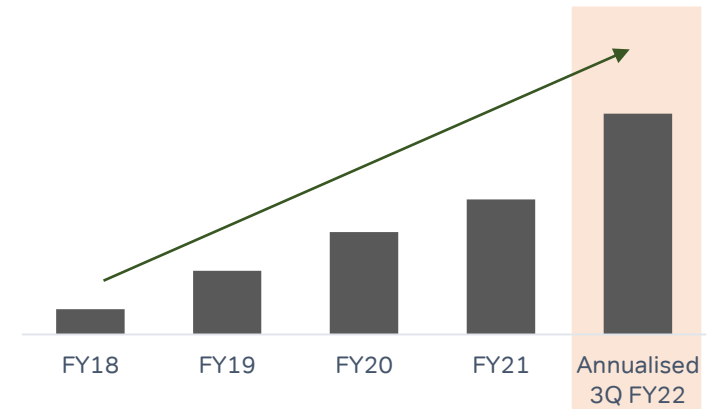
The Bank at scale



49% CAGR on Users



58% CAGR on Revenue



GMV grew ~9X

Profitable in FY22

Capabilities



● **People & Culture**

Over 900 Bank employees

- Seasoned senior management and diverse Board

● **Distribution**

~600 Bn Cash digitized annually

- Distributed services model at 1/10th of cost to serve of traditional banks

● **Compliance and Control**

Received 2nd scheduled status from RBI

- Robust compliance and governance standards of a bank

● **Fully digital Processes**

Processing ~5 Bn transactions annually

- Real-time scalable payments and data infrastructure

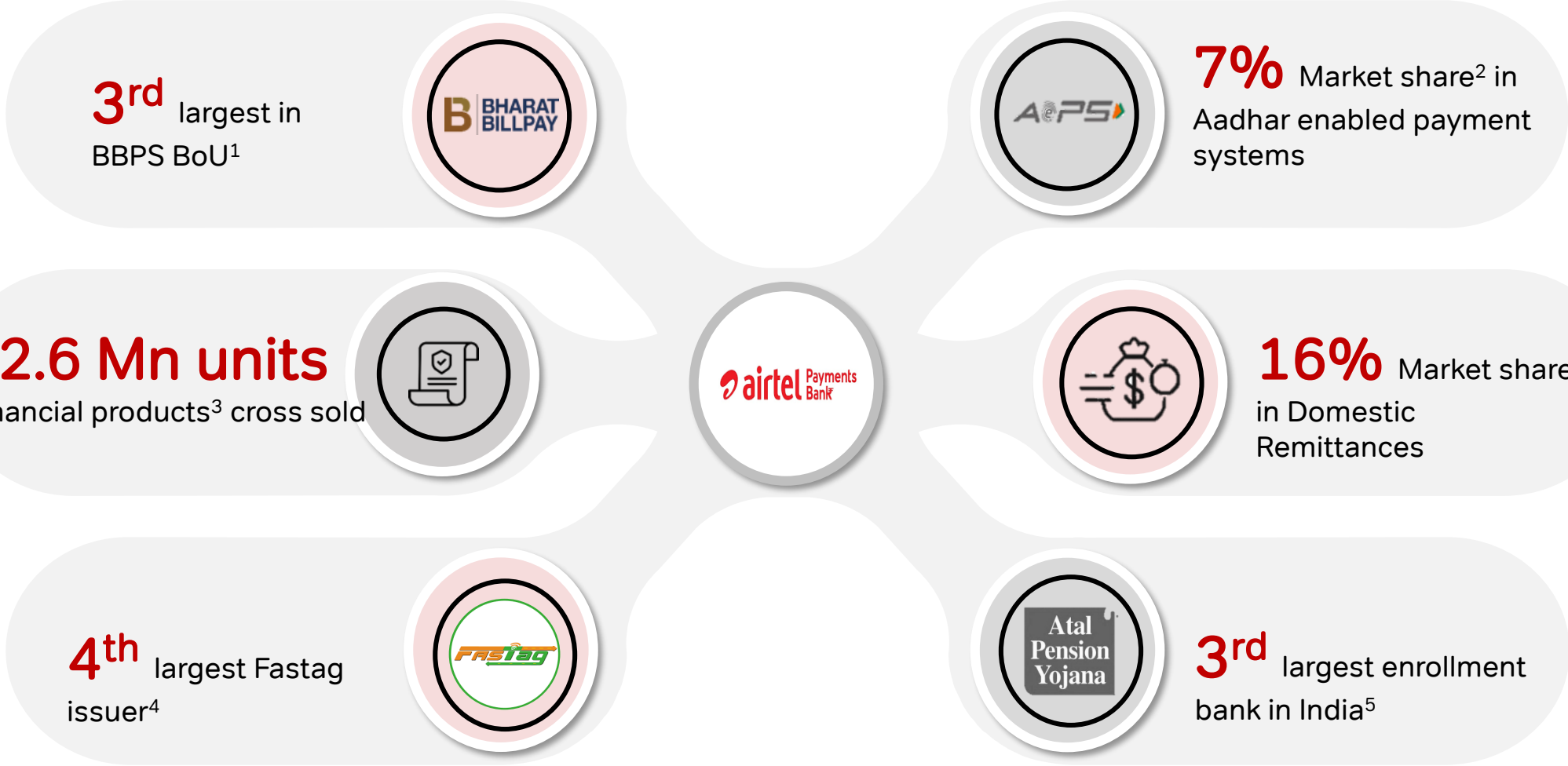
Unique Position



airtel Payments Bank

India's only profitable multi-segment fintech operating at scale with a banking license

Market Impact



3rd largest in BBPS BoU¹



7% Market share² in Aadhar enabled payment systems

~2.6 Mn units Financial products³ cross sold



16% Market share² in Domestic Remittances

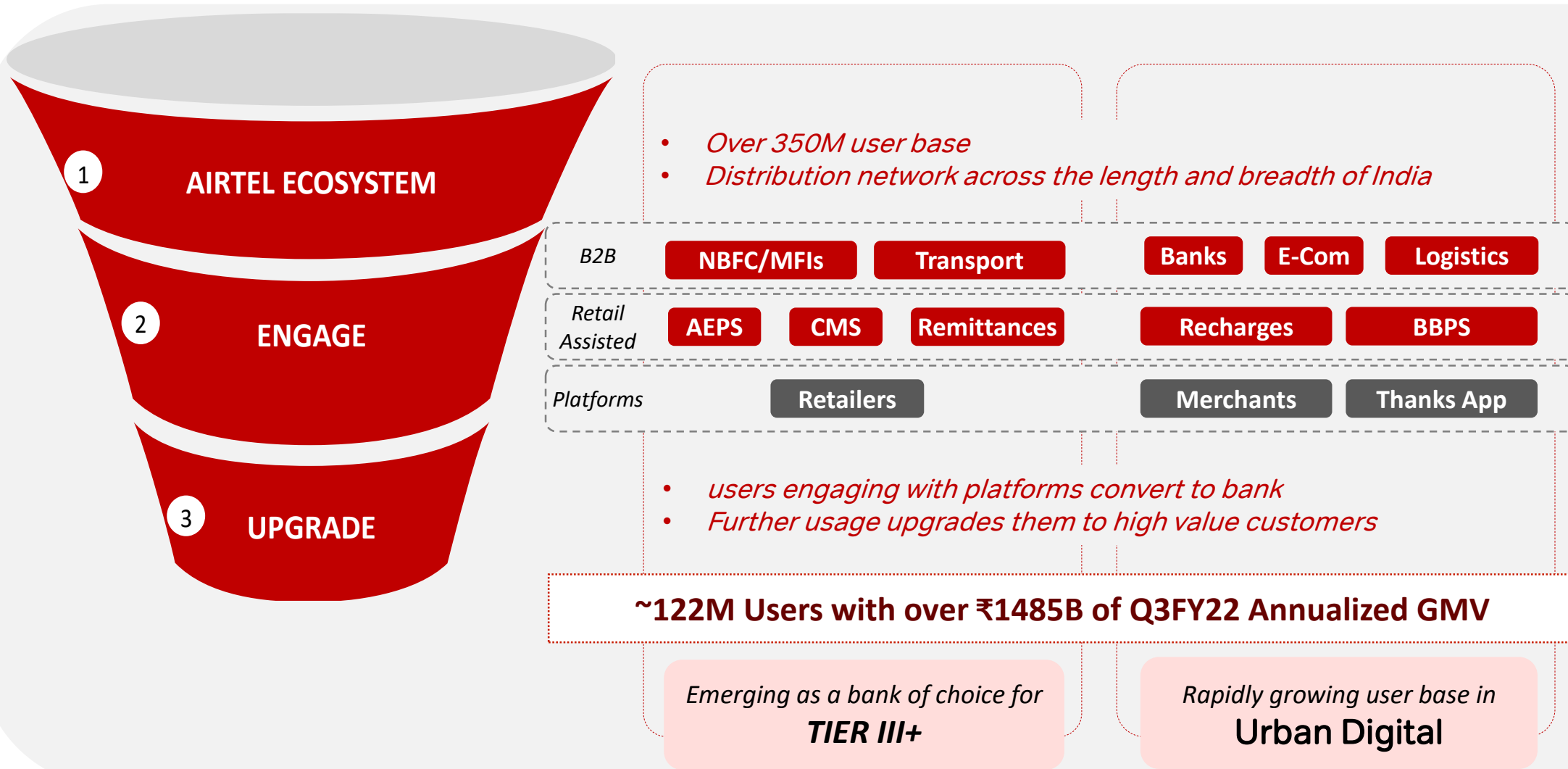
4th largest Fastag issuer⁴



3rd largest enrollment bank in India⁵

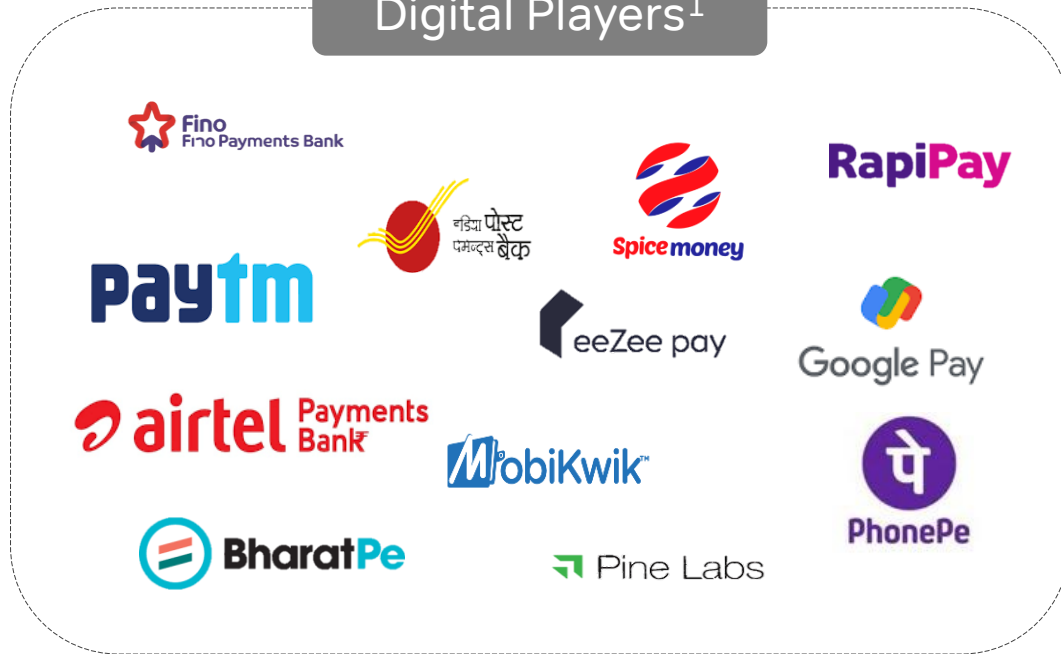
Sources:
1 – BBPS; 2- Internal Analysis;
3 – Covers Atal Pension Yojana, insurance, Digigold, and Loans units processed
4- NPCI, 5 – PFRDA

Deep ecosystem across segments

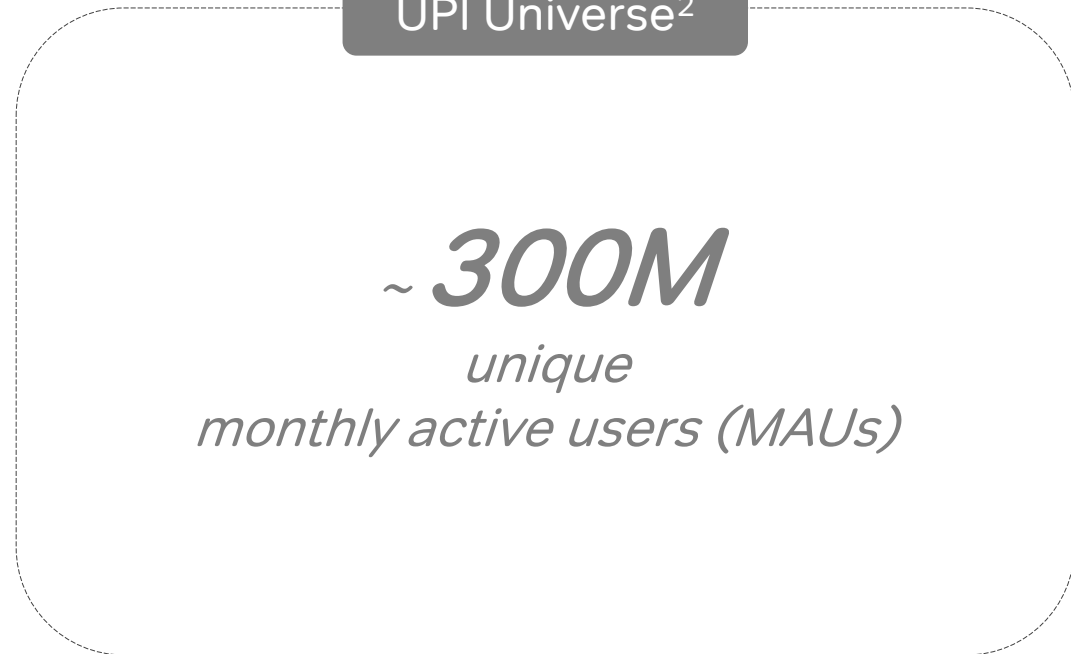


Digital Opportunity

Digital Players¹



UPI Universe²

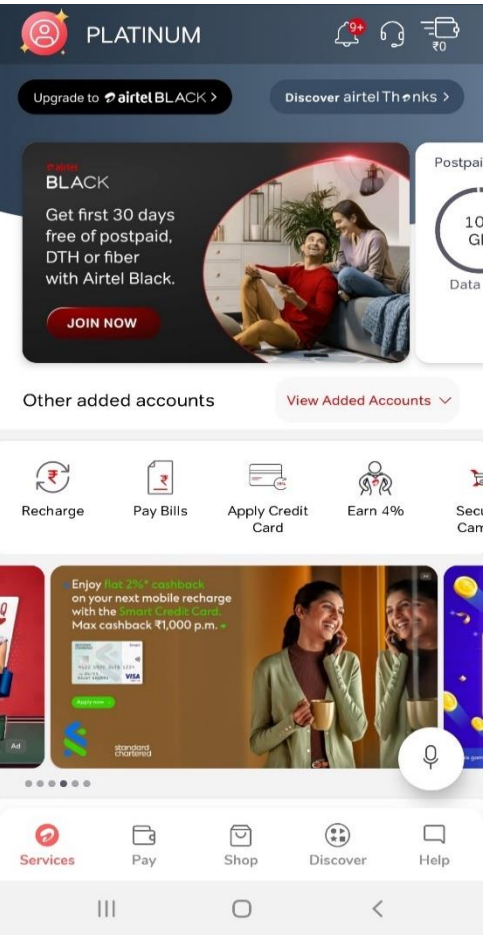


Sustainable model established

Opportunity for growth with the right revenue model

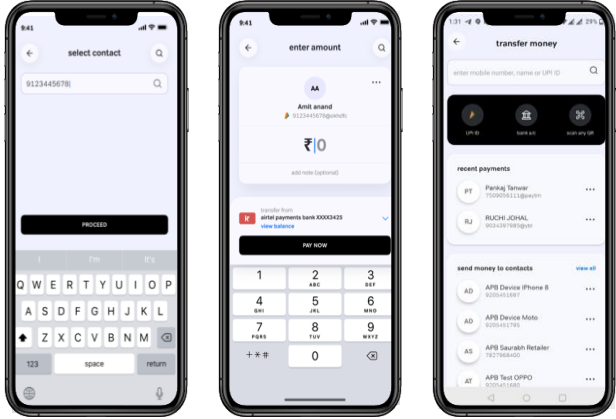
1 – Representative set
 2 – NPCI (Source)

Thanks App



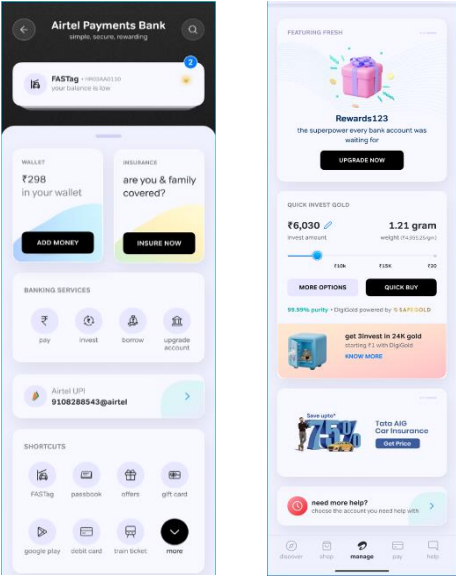
Pay

Existing MTU to expand exponentially over the next few years



DigiBank

One of India's fastest growing Digital-Banks



Revenue Pivots

Cross Sell



IndusInd Bank



New Streams

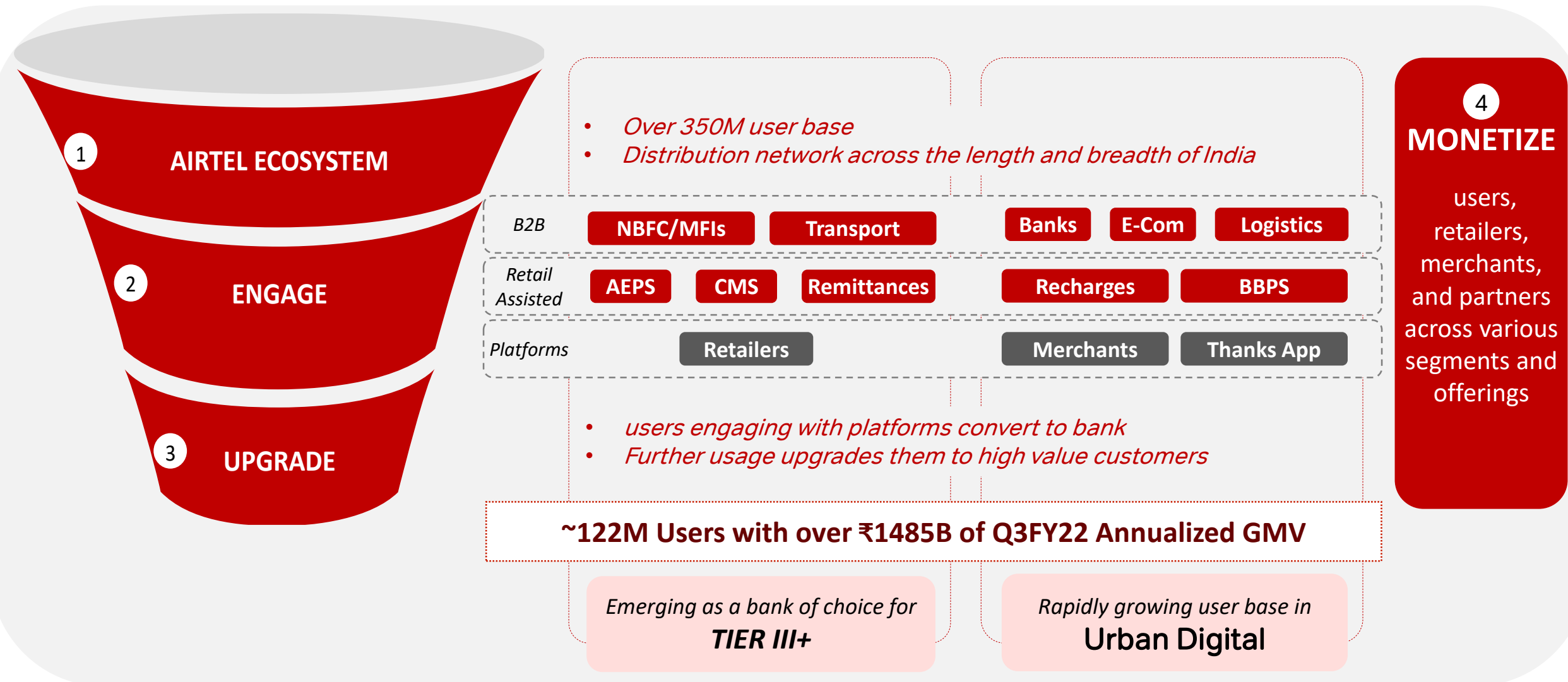


Subscriptions

Rew  rds 123
Plan

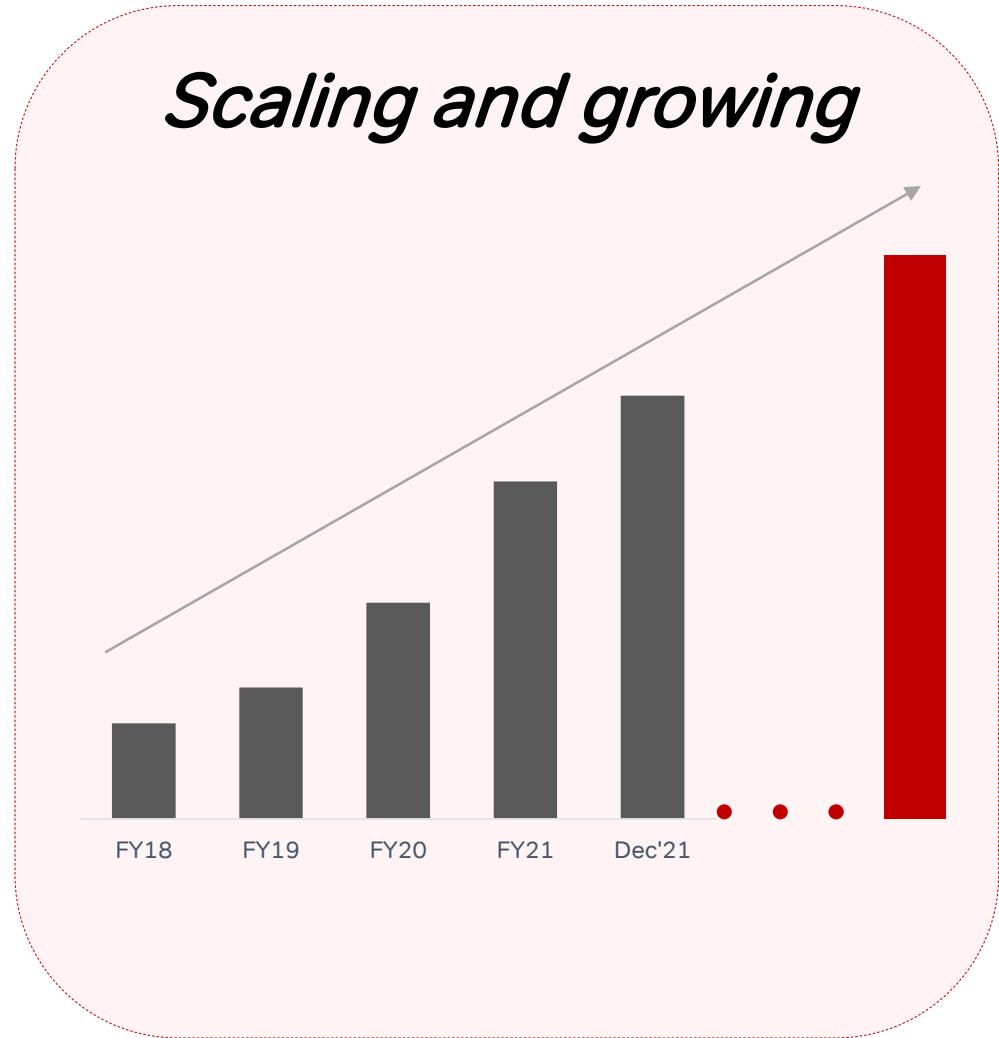
Multiple bundles in pipeline

Monetization across ecosystem



Numbers above are extrapolated based on reported financials and should not be read as any sort of guidance

In summary

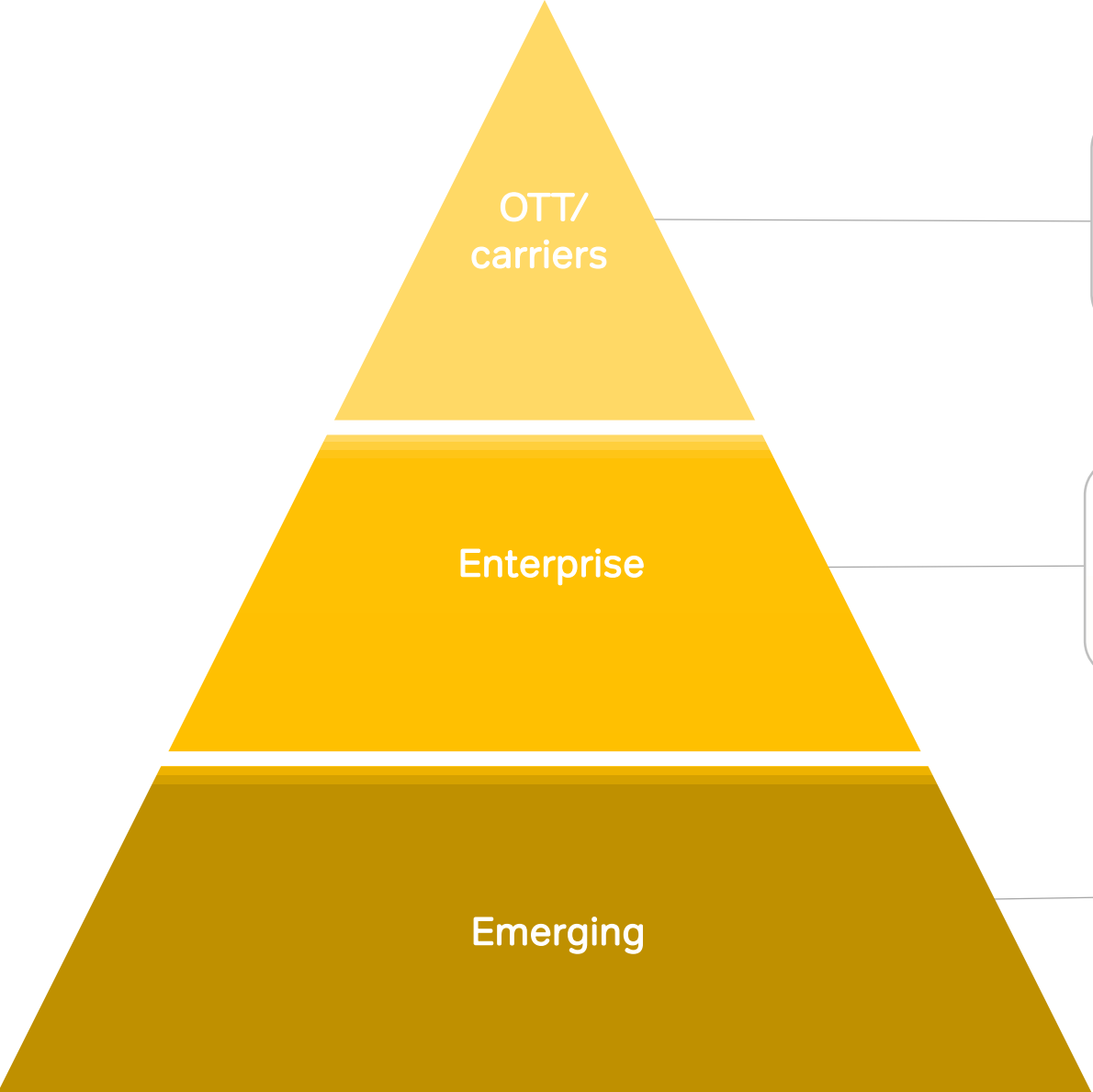




Enterprise Services Overview

25th March 2022

Our customers



OTT/ carriers

ORACLE Google WIOCC
Africa's Hyperscale Infrastructure

du e& SEACOM TM TrillCom

Enterprise

DhanlaxmiBank established 1927 Red Hat UC Urban Company HAVELLS

JK Cement LTD. SWIGGY Dr. Lal PathLabs LIC
भारतीय जीवन बीमा निगम
LIFE INSURANCE CORPORATION OF INDIA

Emerging

Pine Labs Lyra INDIRA IVF
FERTILITY & IVF CENTRE

ezetap Tubelight™
communication is evolution...

Where have we reached today



We power **46.2%** of India's IoT

Airtel IoT is the market leader in India's Enterprise Connectivity Segment

Airtel launches 'Airtel IoT' a 5G Ready Platform for the World of Connected Things

India's **largest network of Data Centers**

Nxtra by Airtel launches new 38 MW Hyperscale Data Center in Chennai

Targeting a sustainable growth with Green energy

Airtel strengthens its green energy footprint with the commissioning of 21 MW Solar Power Unit in Maharashtra

Own and operate the **largest undersea cable network out of India** spanning more than 365000 RKM

Airtel joins SEA-ME-WE-6 undersea cable consortium to scale up high speed network for India's emerging digital economy

World's first network integrated CPaaS platform

Airtel launches 'Airtel IQ Video' – a CPaaS solution to democratize video streaming in India

Gartner

Airtel IQ recognized in CPaaS category; Airtel recognized as the key Indian CSP

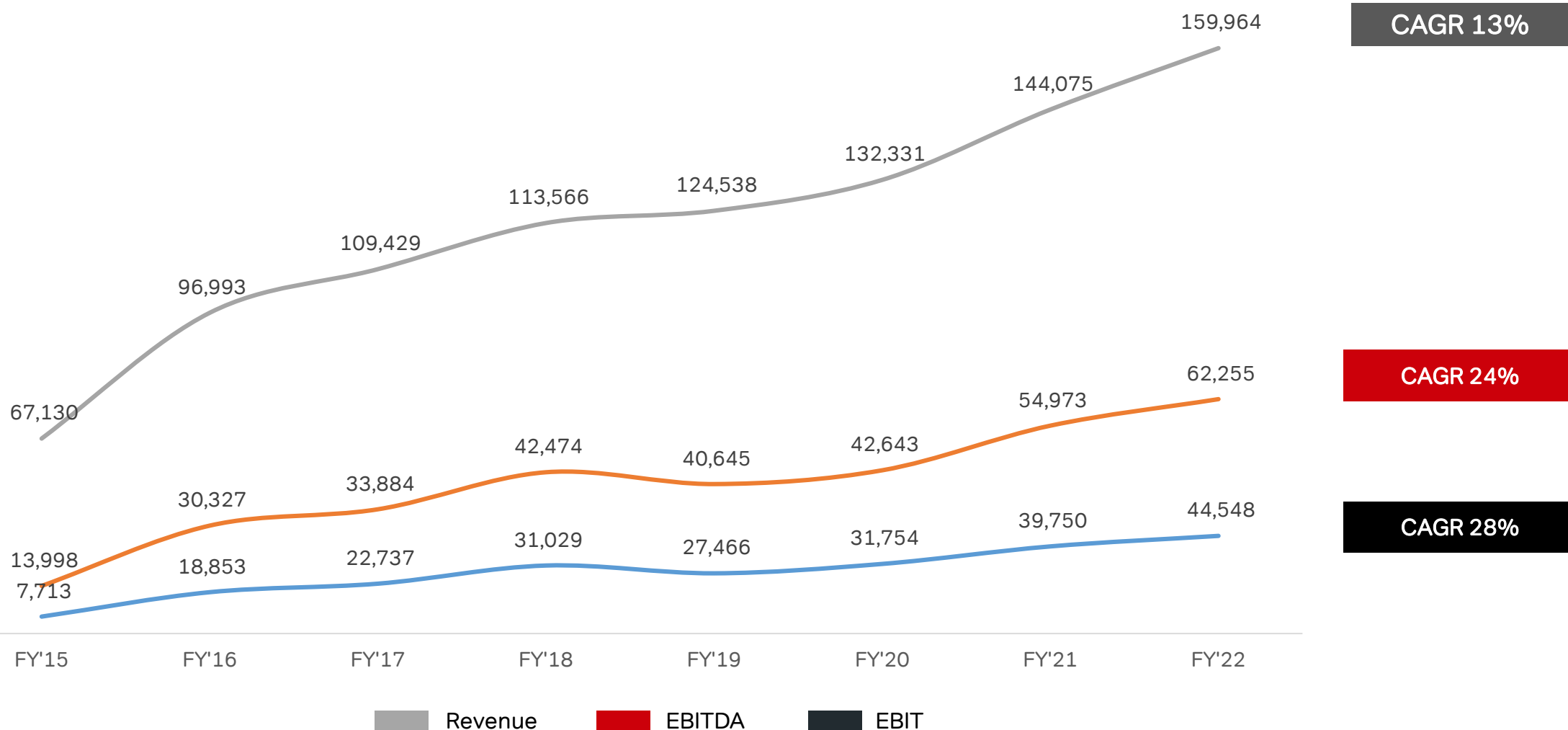
Reinventing itself to stay ahead of the curve – Lavelle Networks, Hughes, 5GforBusiness

Airtel acquires ~25% strategic stake in SD-WAN startup Lavelle Networks

Hughes and Airtel Form Joint Venture to Provide Satellite Broadband Services in India

Airtel rolls out #5GforBusiness to demonstrate 5G use cases for enterprises

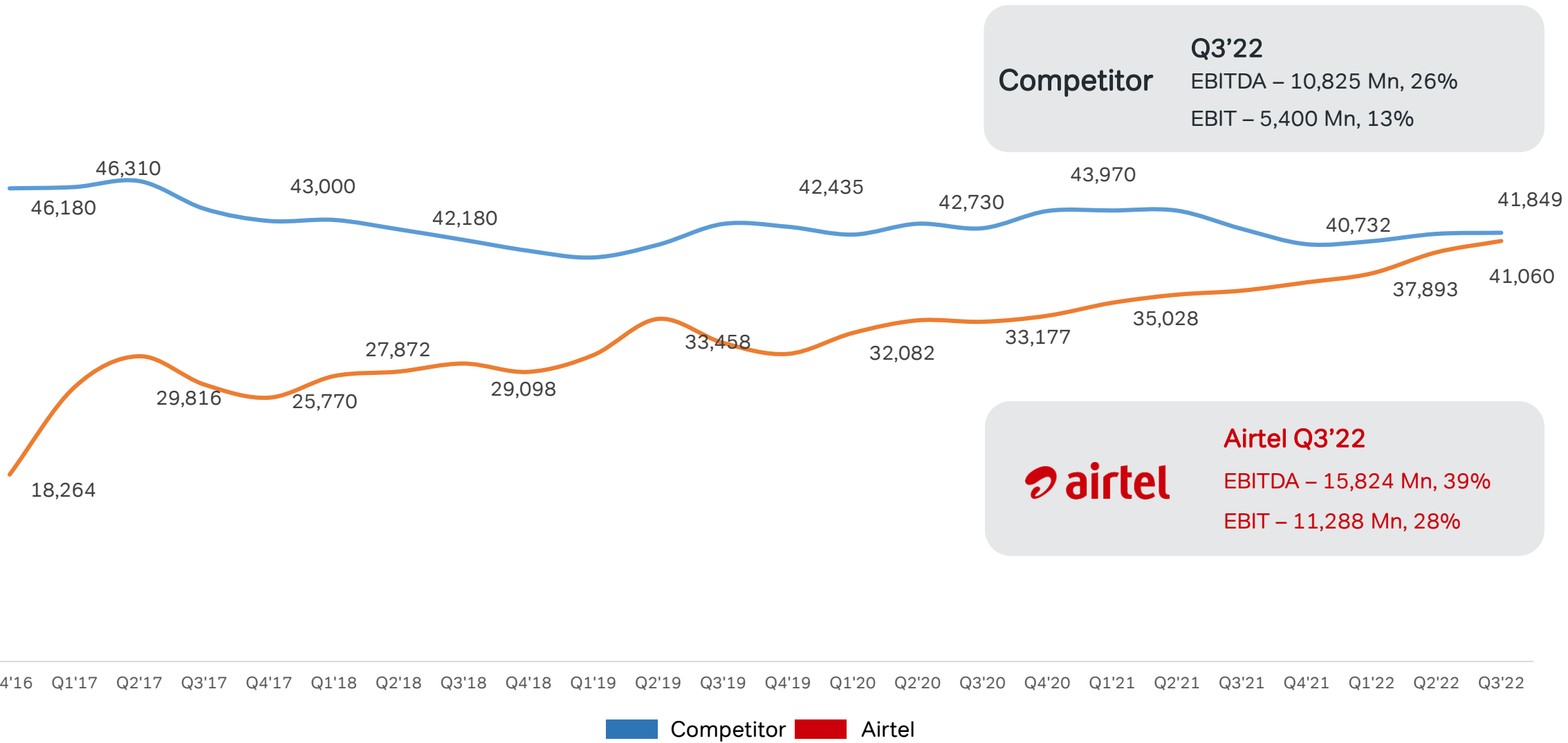
Performance so far



All figures in INR Mn
 FY22 revenue and EBITDA assuming Q4FY22 performance remains same as Q3FY22

Numbers above are based on reported financials and should not be read as any sort of guidance

Outperforming Competition



New horizons – expansion in new markets

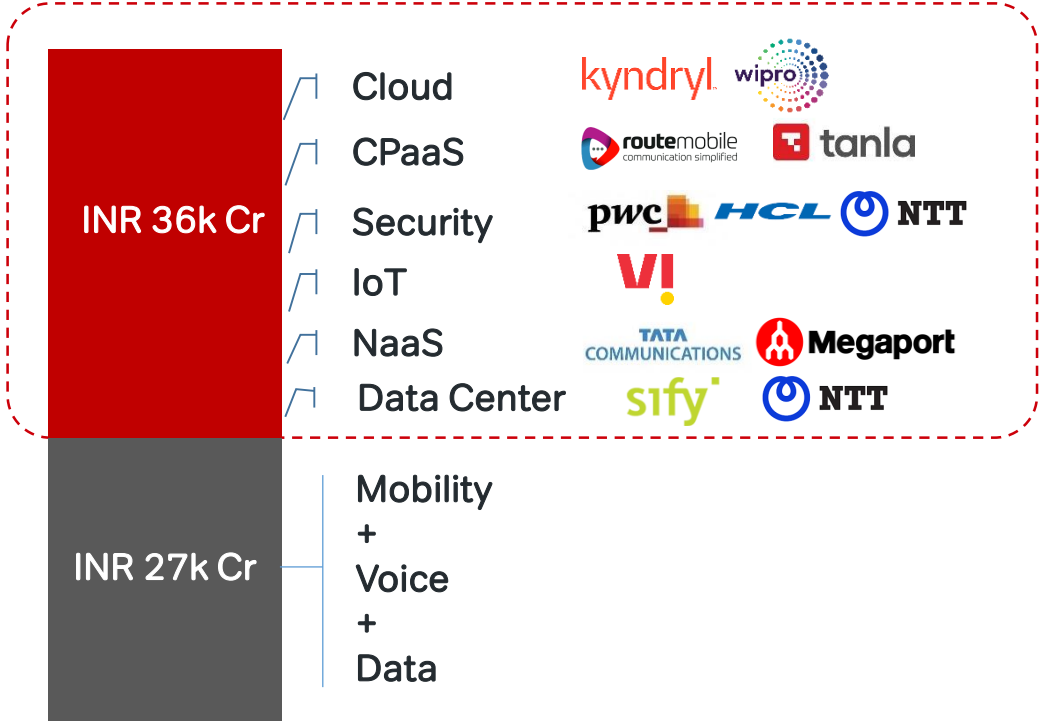


Addressable market
INR 63k Cr

Competition

Emerging Products
(Data Center + NaaS+
IOT + Sec + CPaaS +
Cloud)

Connectivity Products
(Mobility + Voice + Data)



Emerging Products
@ 25%+ CAGR

Addressable Market
FY'22

Identifying Opportunities



From

To

1

Revenue growth driven by large customer accounts

2

Market shift from connectivity to new product areas

GTM focus on increasing presence across Customer base to capture market potential

Innovate in connectivity and accelerate solutions beyond connectivity and maintain margins

4 Pillars for our future growth



1

GTM 2.0

2

Product

3

Digital

4

People

4 Pillars for our future growth



1

GTM 2.0

2

Product

3

Digital

4

People

1

Customer
Segmentation

2

Delayering of
Structure

3

Sales
effectiveness

4

Channel to
Insource Sales

5

Product
Specialist

4 Pillars for our future growth



1

GTM 2.0

2

Product

3

Digital

4

People

Winning beyond core in new markets



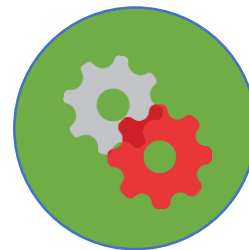
Cables



Data Center (Nextra)



NaaS



CPaaS



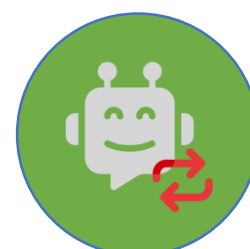
Cloud



Security



IoT





5G





Submarine Cables



- 

3,65,000+ Route KMS
Across 50 Countries &
5 Continents
- 

65+ Global
PoPs
- 

17 Countries
Presence
- 

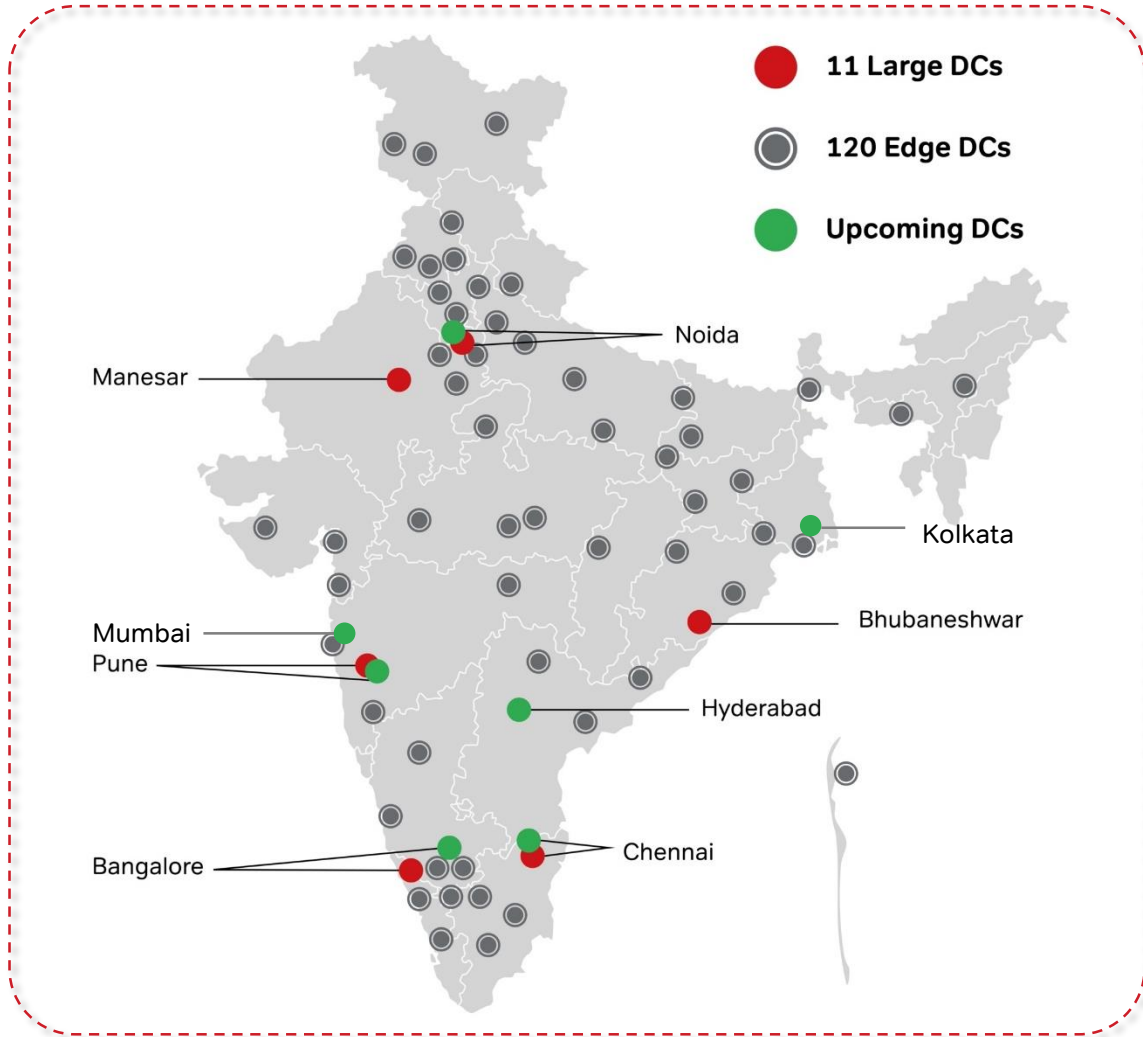
35T capacity
landing in India

1 SMW 6

2 2 Africa

3 Extension to new location, Chennai - Mumbai

4 New Landing stations in India and Africa



Over **50%*** power through renewable sources for core DCs

1 Accelerate Build

2 Work with Hyperscaler

3 Drive ESG agenda

ORACLE



VERITAS



JK Cement LTD.



NICE



GREAVES

Worldline



*By FY23

Moving up the value chain.

\$1Bn market in
3 years time

Moving from

#1 Connectivity Player
to leading innovation in connectivity

1

SDWAN



2

Bandwidth on Demand

3

Work from Anywhere

4

Devices

We power
46.2%
of India's IoT

4500+
Customers

11Mn+
Devices

1

Network : 2G/ 4G/ NB-IoT/
Satellite

2

Focus on top segments
Auto / Utility / Pos


3

Horizontal solutions - Device Mgt
/ Location services / AIS 140




A Unified Customer Engagement Platform


130 Bn transactions
300+ customers



Voice



Messaging



Video



Mart-tech



Contact Centre



Cloud Connect

01



Every major
cloud player

Edge Cloud

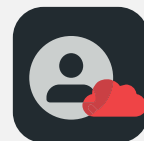
02



CDN

Public Cloud

03

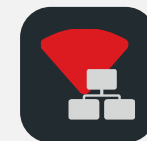


aws



Hybrid Cloud for applications

04



ORACLE

1

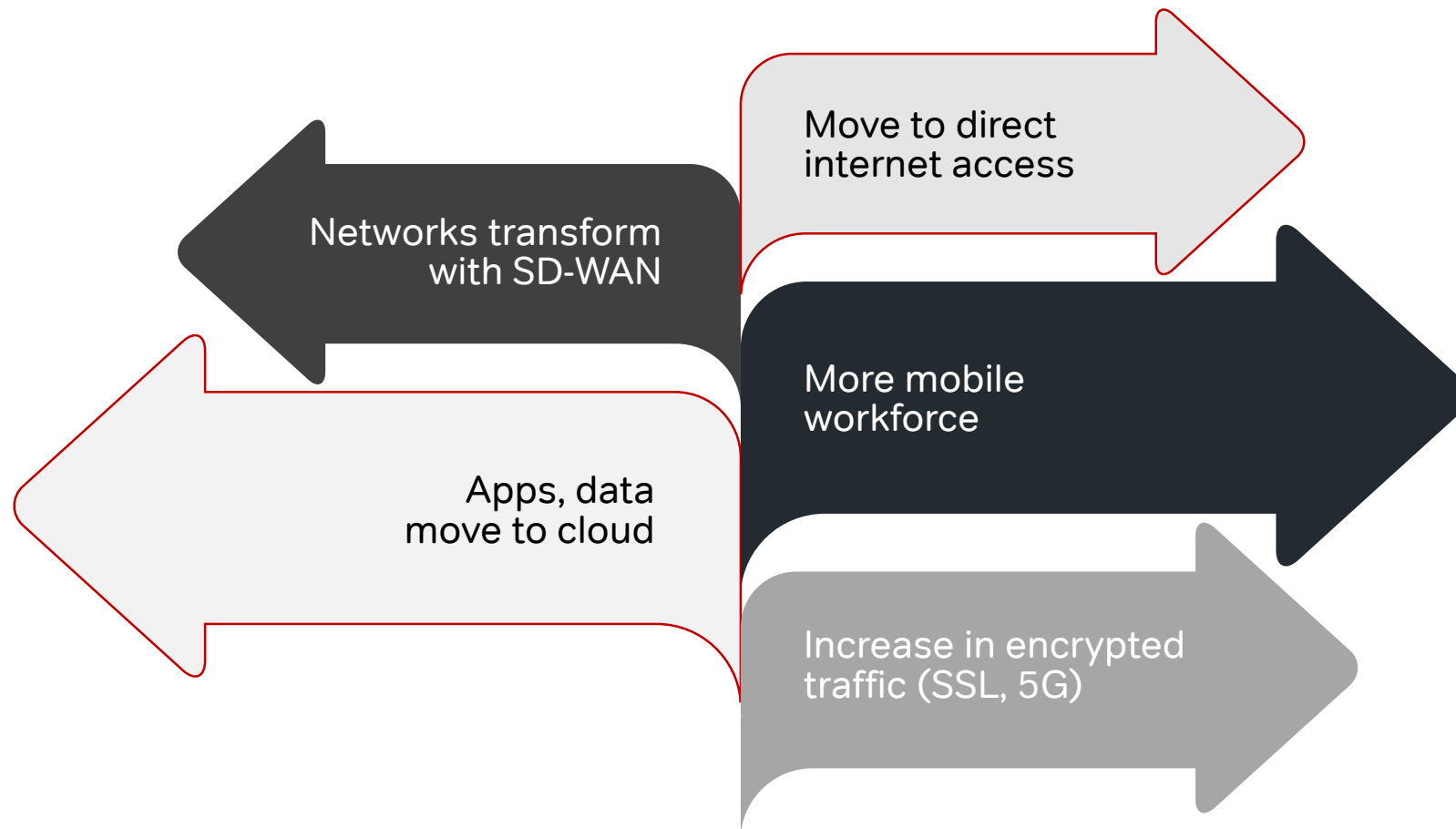
SOC

2

Network
Bundle

3

Multi-product
and technology



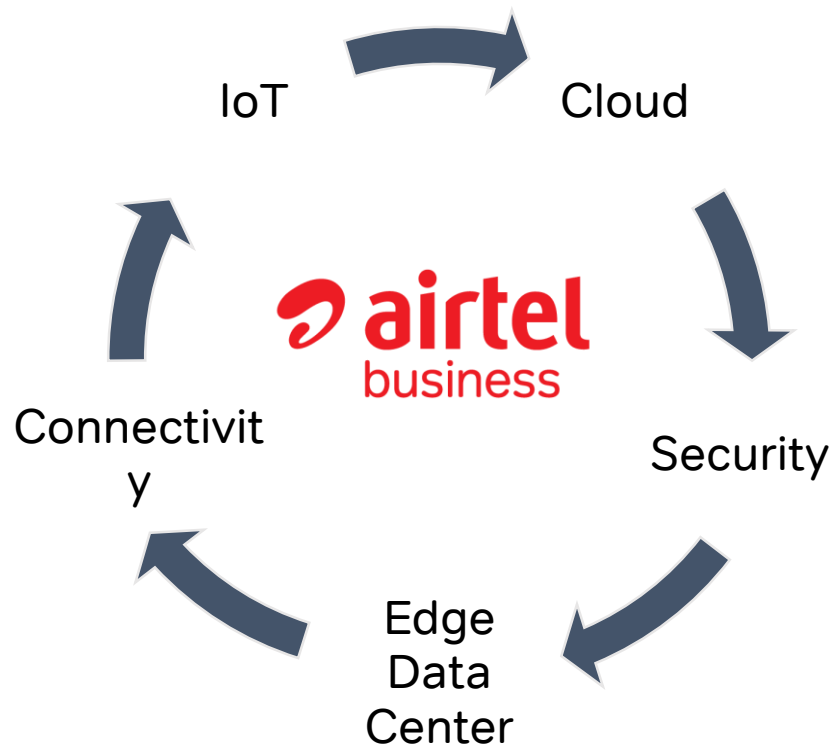
#5GforBusiness | Enabling the entire ecosystem – not just 5G



Partner ecosystem



Solutions ecosystem



Use Cases



4 Pillars for our future growth



1

GTM 2.0

2

Product

3

Digital

4

People

GTM 2.0
SMB and
Enterprise
Transformation

+

Experience 2.0
Omnichannel
experience

+

**New Revenue
streams / New
Products**

#airtelTh**o**inks
for**B**usiness

Airtel Thanks for Business



An integrated self-serve platform to allow customers to discover, buy & manage all Airtel Business applications



Monthly Active Customers
100K+



Repeat Customers
80%+



Paying Customers
60K+

60%

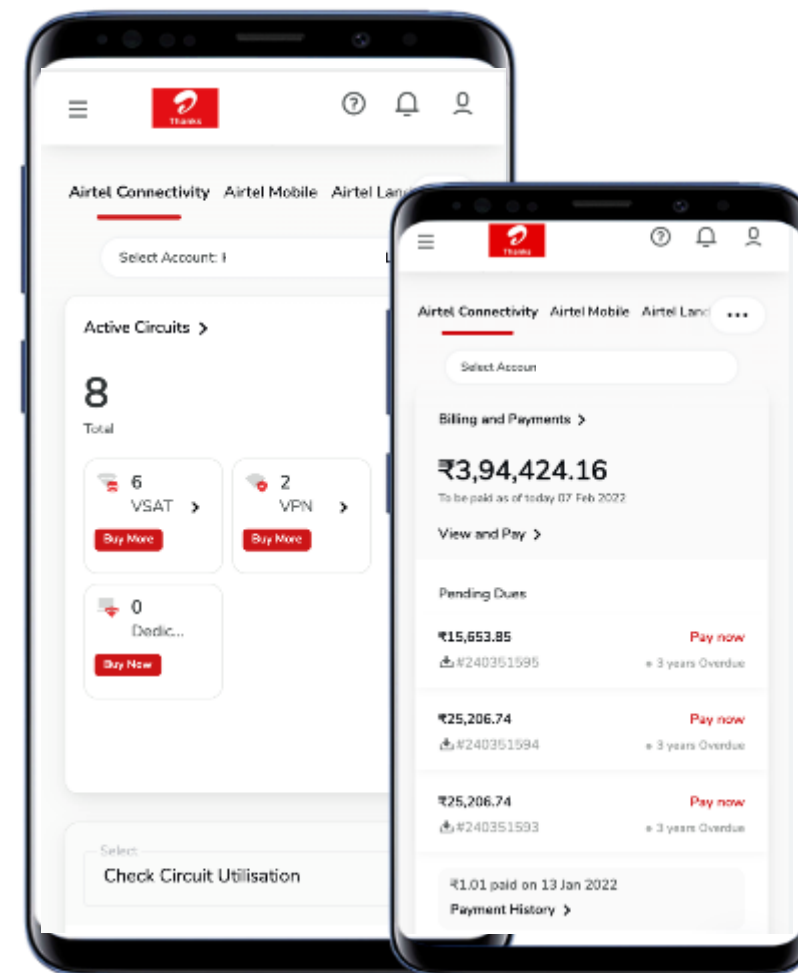
Decrease in emails

15%+

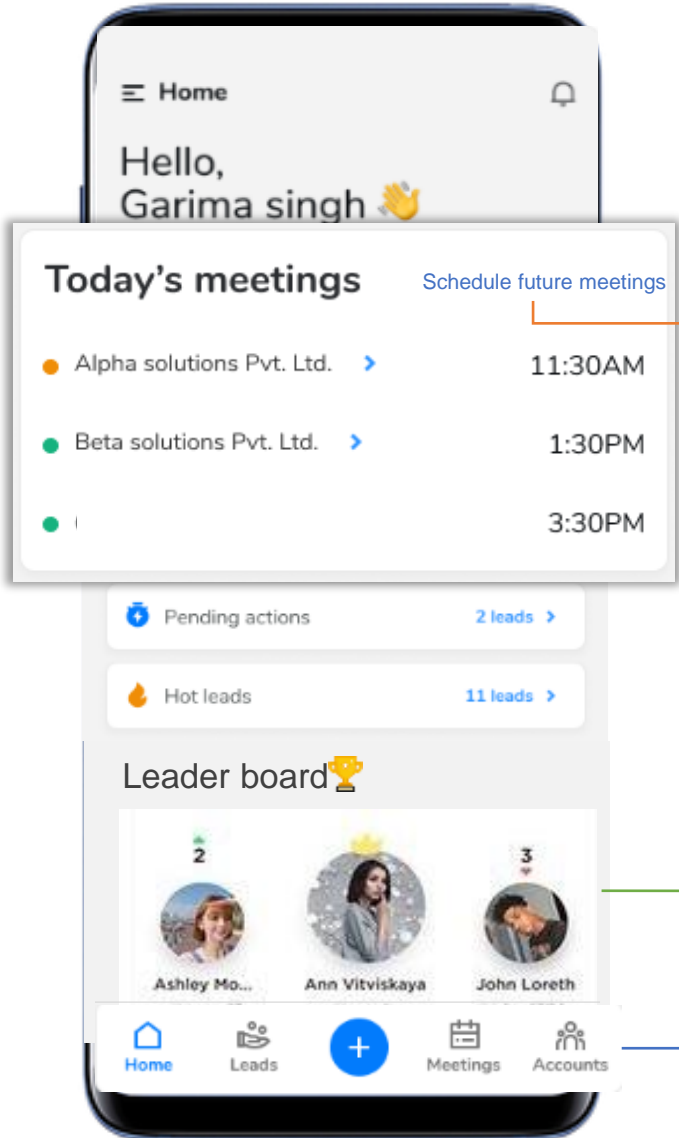
Online Orders

40%+

Reduction in payment
collection Time



Airtel Work – Improving productivity of front-line sales



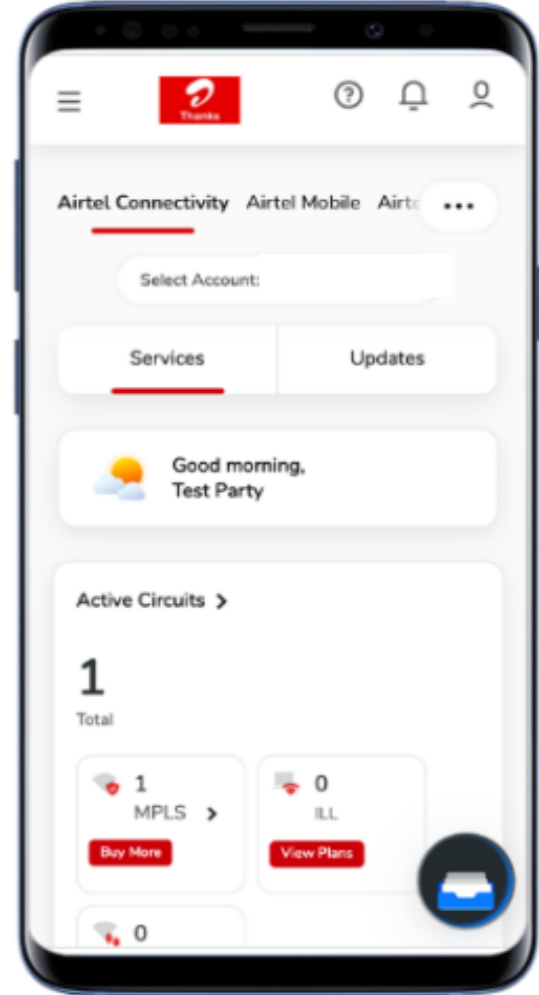
1 **Beat planning** with territory mapping and meeting planner

Next-best-actions
Critical highlights and notifications to drive AMs actions

2 **AM performance** display and gamification

User taps on account details from the list

3 Establishing better customer relationship by offering **360° view of customers**
Via Airtel Thanks for Business



4 Pillars for our future growth



1

GTM 2.0

2

Product

3

Digital

4

People

A Strong leadership focused on building stronger teams



**Talent
Refresh**



**Upskilling of
Talent**

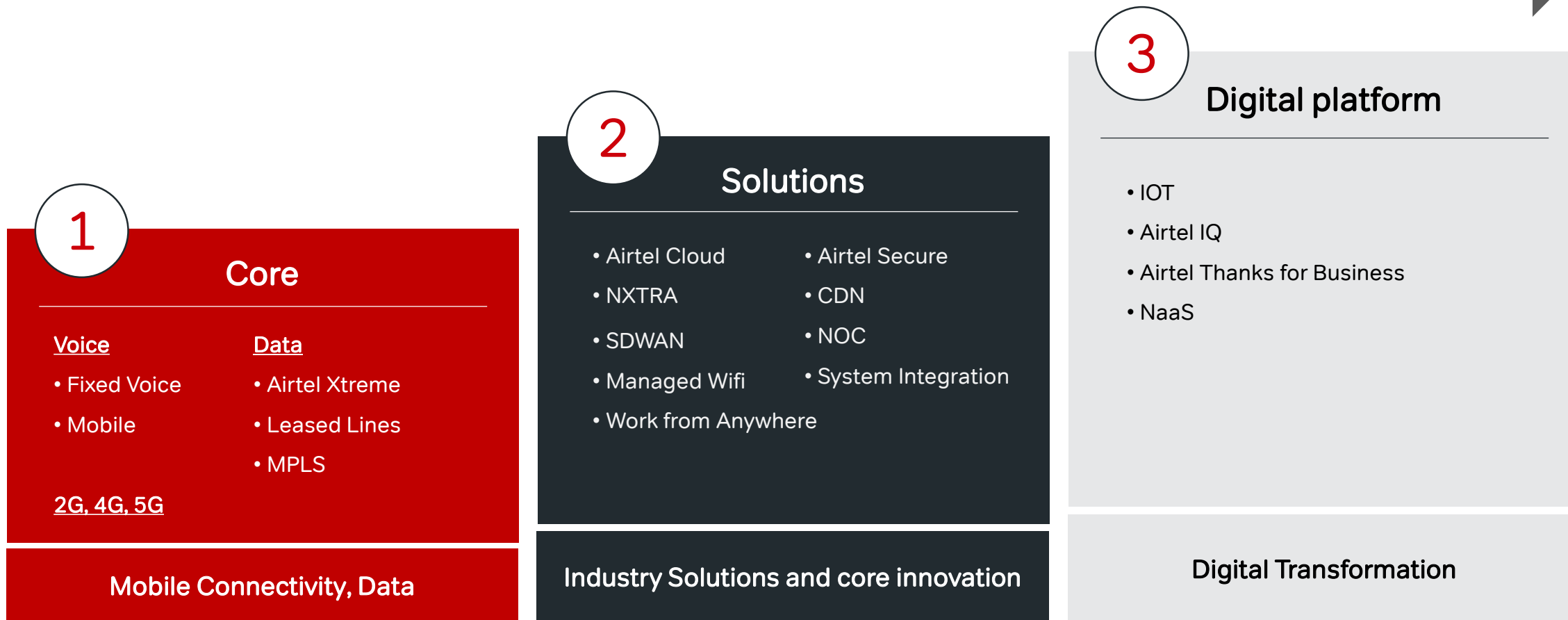


Culture

Value Creation for Customers through Airtel Ecosystem



Increasing value to Airtel Business Customers



We continue to innovate in our Core offerings while bringing in new products and solutions into our portfolio



Thank you

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