

Orange

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RCS P2P & A2P

OMEA Status



V 2.1

Step 1 : Initiating the Market

13

RCS enabled in 13 Orange MEA Market

...and 17 by H1 2020

1 - Aug 2017 - Jordan



2 - Aug 2017 - Morocco



3 - Dec 2017 - Côte d'Ivoire



4 - Dec 2017 - Tunisia



5 - Dec 2017 - Madagascar



6 - Jun 2018 - Senegal



7 - Jun 2018 - Guinea Conakry



8 - Jun 2018 - Guinea Bissau



9 - Jun 2018 - DR Congo



10 - November 2018 - Niger



11 - December 2018 - Cameroun



12 - March 2019 - Botswana



13 - Nov 2019 - Burkina Faso



... and More in 2020



RCS enabled in 13 Orange MEA Market

...a fast growing number of MAU



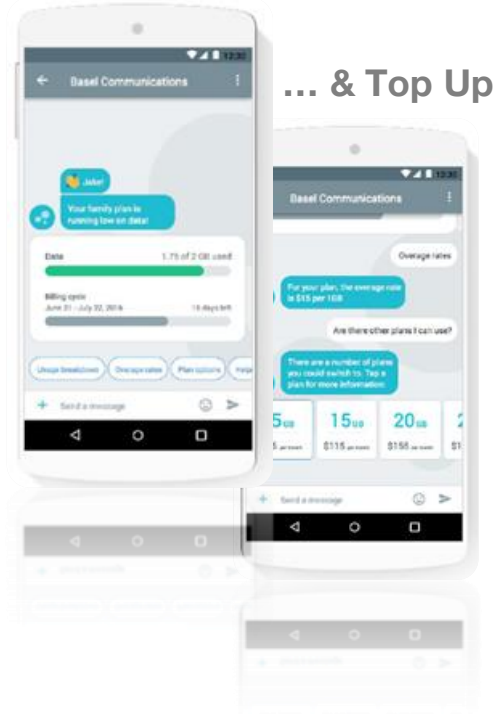
- First RCS launches in Africa initiated by Orange in partnership with Google.
- RCS live in 70% of Orange MEA markets; expected 95% by H1 2020
- +2M RCS users provisioned (**x4 vs 2018**)
- +18% MoM growth in 2019
- Opt-out and compatible devices availability are the Key drivers

Step 2 : Developing Active Base

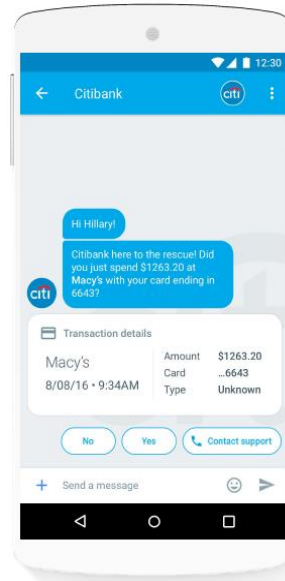
Chatbot usage = new business opportunities

revenues share, up/x selling...

Mobile Current Balance



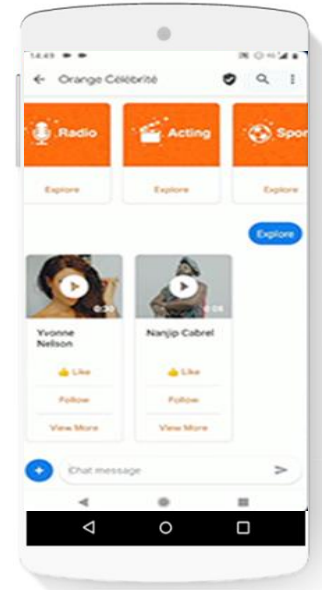
Online Payment Security



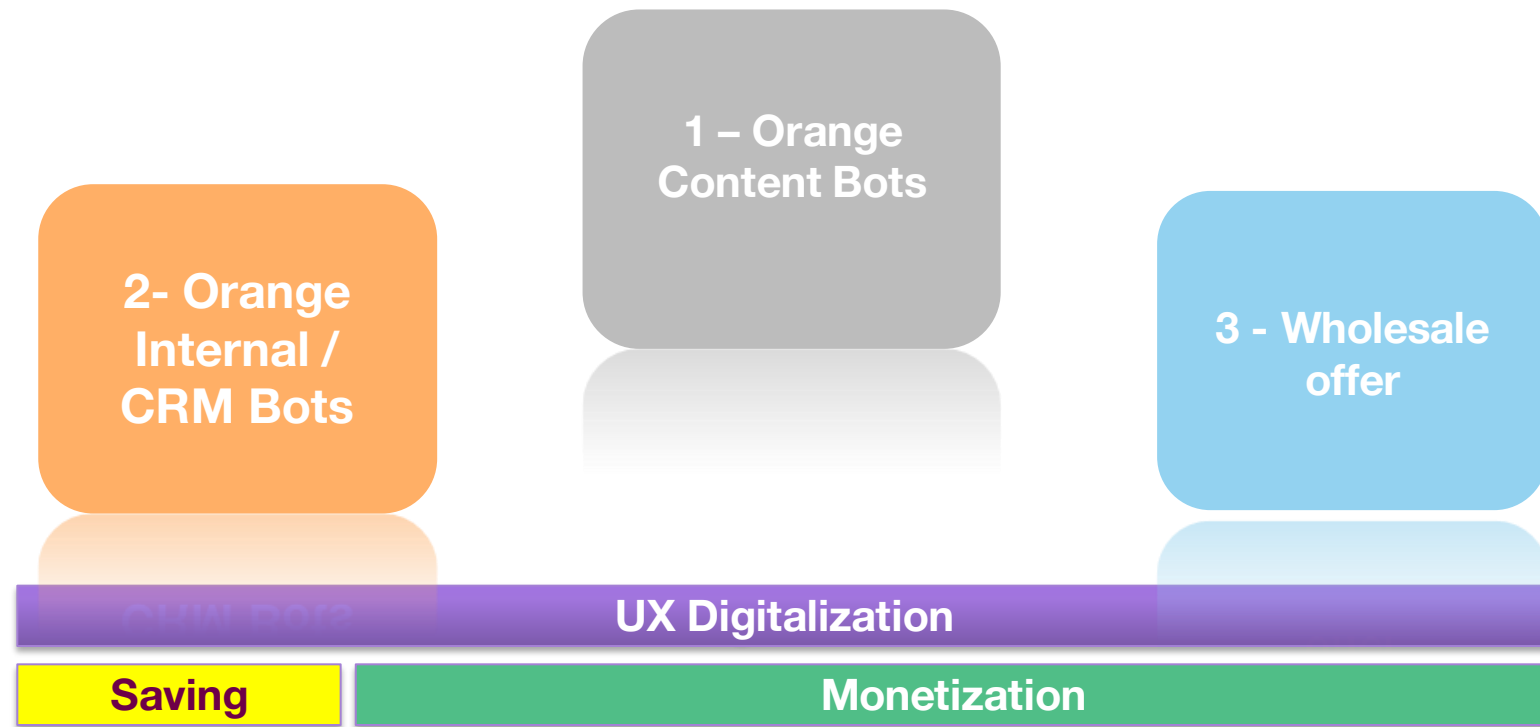
VIP Access cards to parties, events...



Content Bots Celebrities



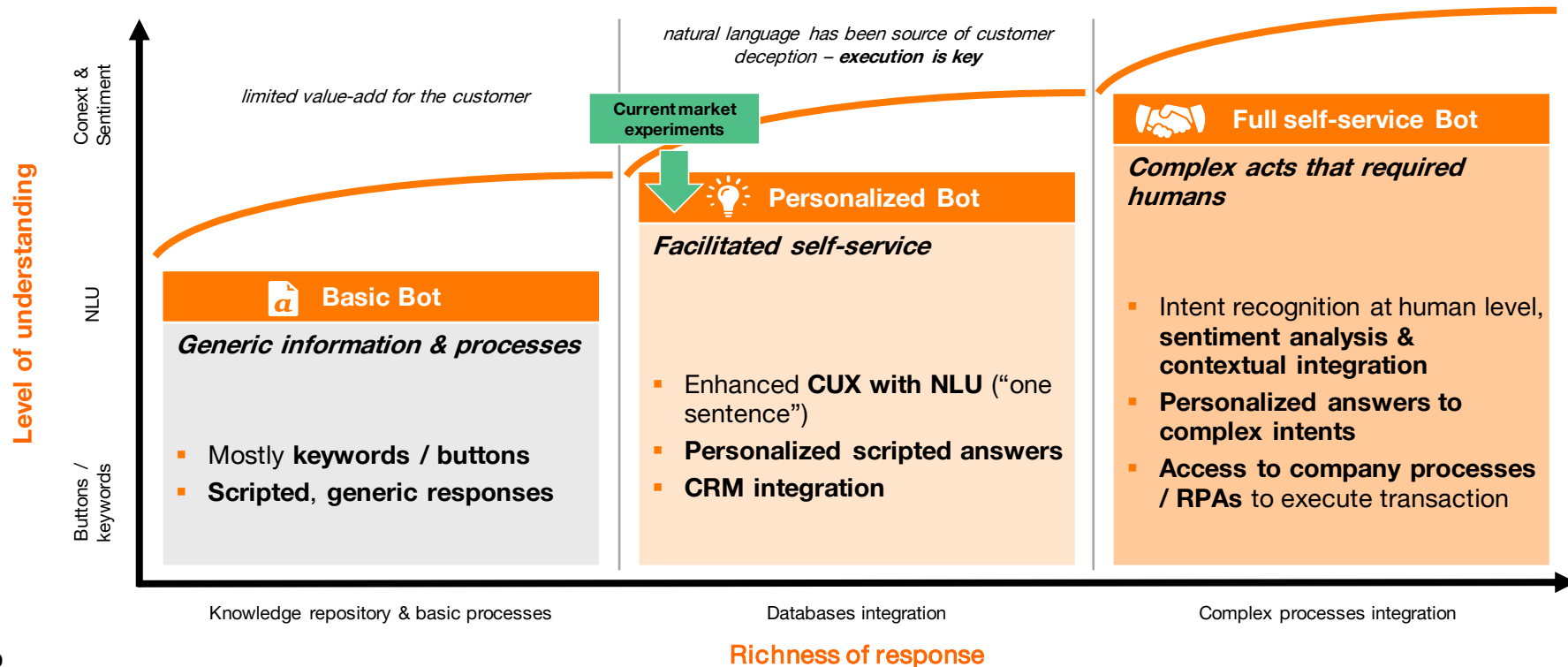
Orange Position : Developing active RCS base thanks to A2P usage with a 3 axis strategy



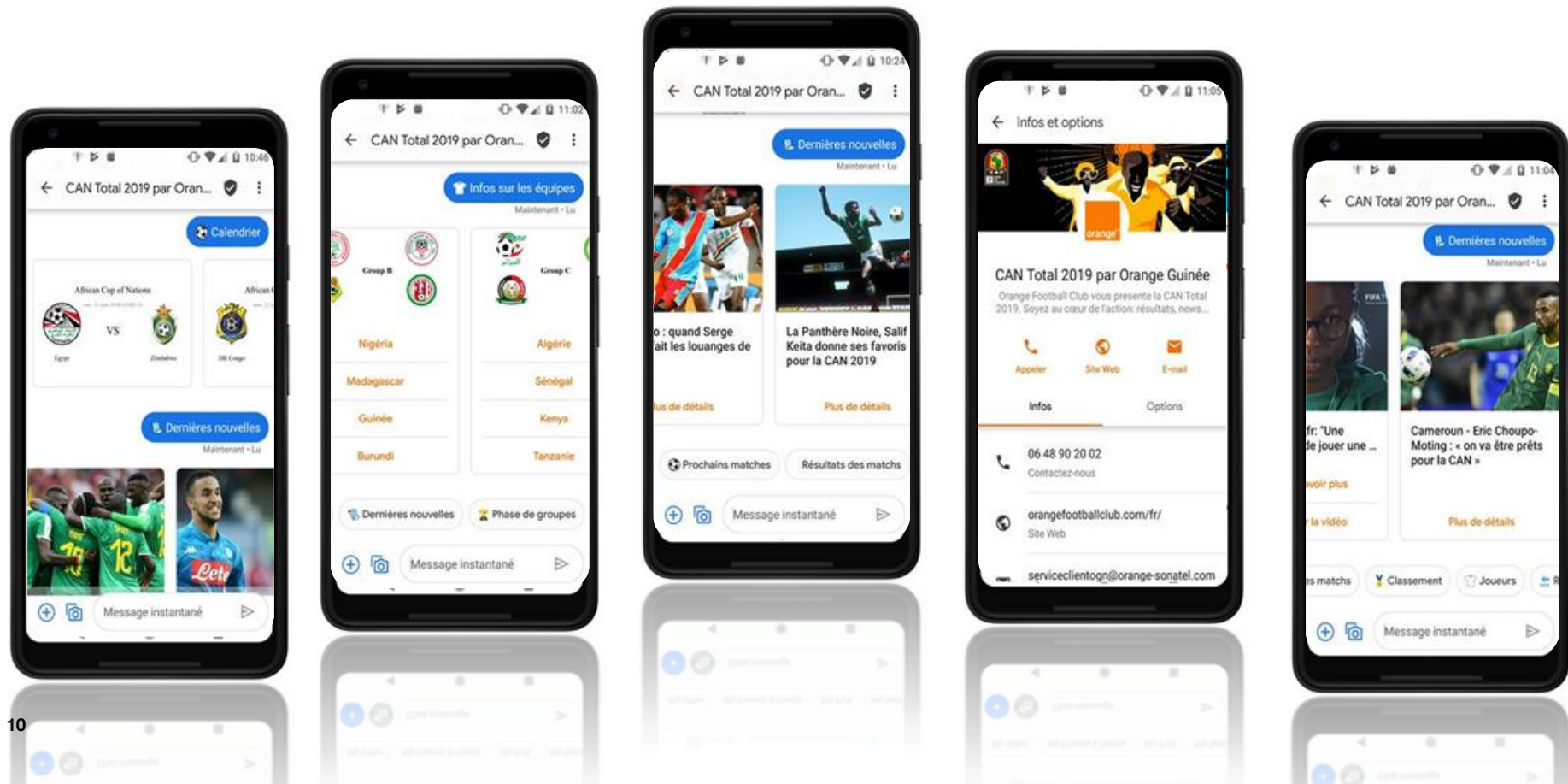
Defining the use case

Managing the complexity

Synthesis of Chatbots stages of maturity



1- Orange Content Bots : First RCS chatbot CAN 2019... Because we love Football too !



Orange Content Bots : CAN 2019 Chatbot

... Launched in June '19, initiating the A2P awareness

CAN 2019 Chatbot



- Launched simultaneously in 6 MEA markets : CM, SN, CI, MG, CD, NE
- The CAN 2019 bot was the world's first RCS multi country Chatbot !
- Developing and hosting internally using Orange Bot Platform.
- More than 1 million interaction with more than +74% of read success !
- Impact : x2 MAU during the campaign

2- Orange CRM Bots : A “Welcome to RCS” Bot to show value of RCS beyond SMS on Google Messages



As a part of GTM efforts the Welcome Bot aims to:

- Introduce the service (create the awareness)
- Clarify the pricing (Data vs SMS)
- Help the clients to understand the features of the service beyond SMS (Group Chat , HD Media, read/type status...)
- Show the potential of the conversational services using RCS

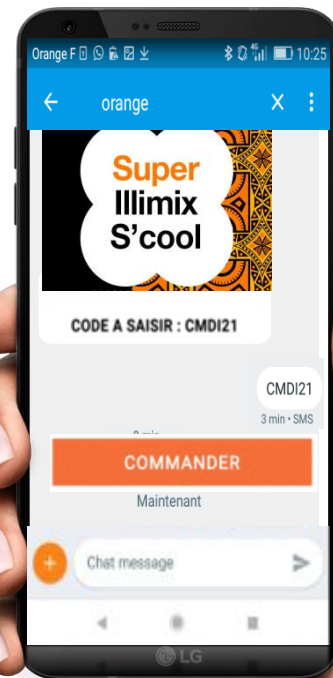
Orange CRM Bots : RCS the new Direct Marketing channel for Rich Marketing Campaigns

*Promotional campaign eg. for Orange Senegal
Illimix (Web - OSN, 2018)*



Evolution towards
Chat Messages)

Relay on Chat
Messages

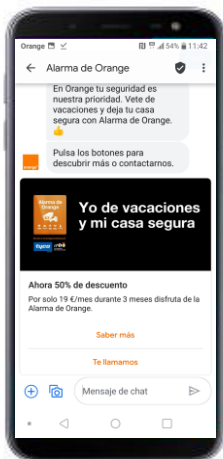


- ✓ Promote Orange offers with an enriched direct marketing content
- ✓ Getting More engagement and conversion rates

Orange CRM Bots : Orange Spain

... loves A2P on RCS too

Alarma de Orange

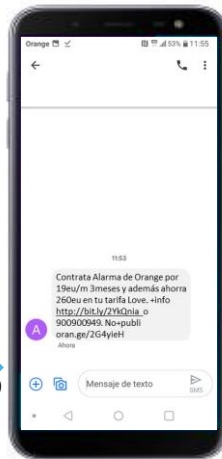


RCS campaign

Launched: 25/09/2019

SMS campaign

Launched: 25/09/2019



28% Read rate
(customers that have
seen the bot)

2% Read rate
(customers that have
clicked the URL)

Ser de Orange



RCS campaign

Launched: 24/09/2019

SMS campaign

Launched: 24/09/2019



2,33% Conversion
rate
(customers that have
used the program)

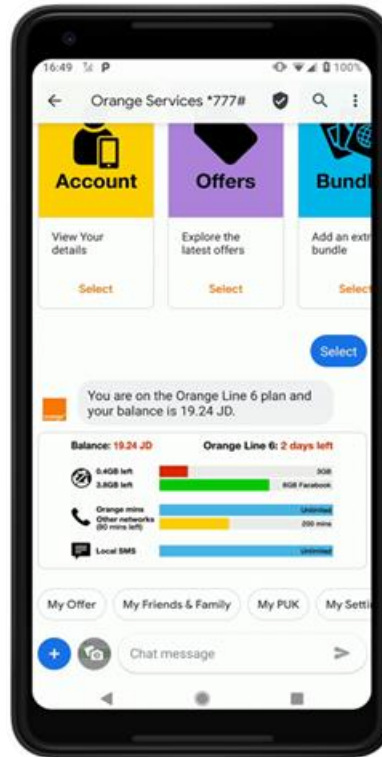
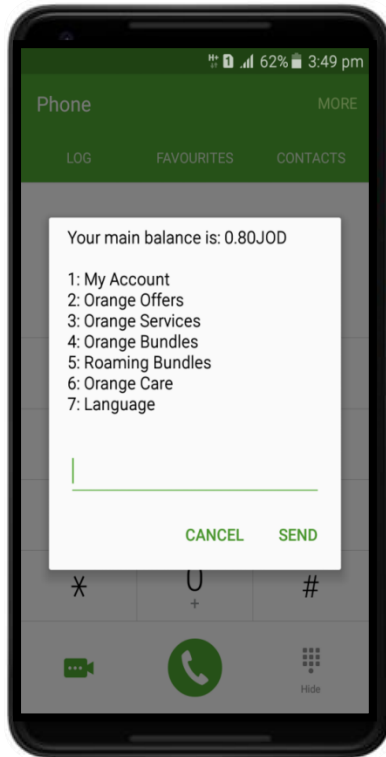
1,15% Conversion
rate
(customers that have
used the program)

Conclusions

- ✓ RCS campaigns show significantly better results: **x10** read (Alarma de Orange), **x2** conversion (Ser de Orange)
- ✓ Comparing customer feedback from both Ser de Orange and Alarm campaigns, it is shown that simple campaigns (not conversational, simple ending options) have better results, probably due to the customers lack of knowledge of the new RCS capabilities.

Orange CRM Bots : Customer care bots ...

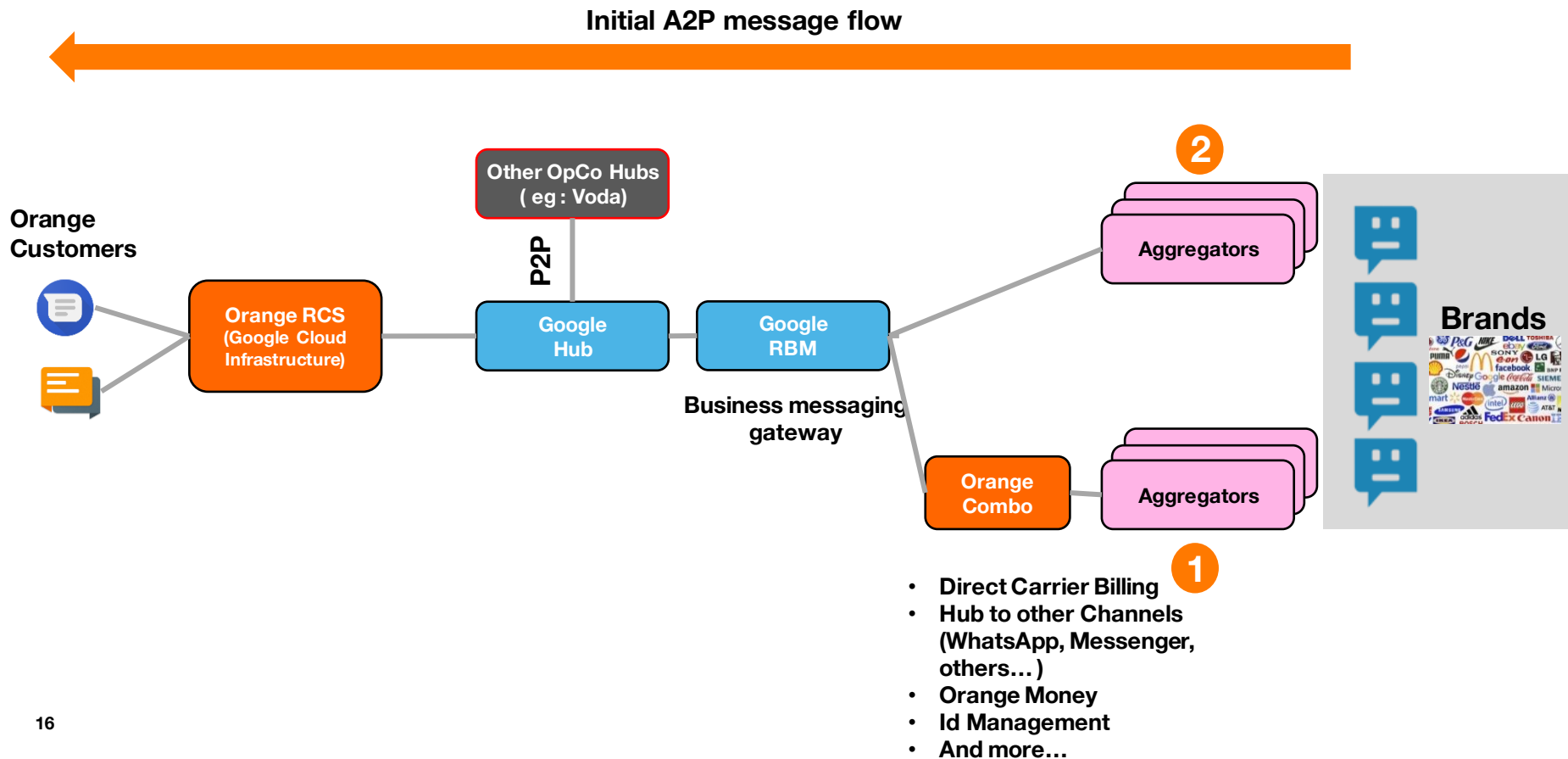
Using USSD as a first step



- Bot use case:
 - USSD menu to menu driven (full self-service) bot in → *777#
 - The USSD menu will mainly focus on:
 - Check my balance
 - Upgrade rate plan
 - Recharge
 - Purchase data plans
 - VAS services

3 - Wholesale Offer : Business messaging solution architecture

Orange Combo, a partnership accelerator



Partnership ecosystem

Make, buy, Partner ?

To be an active stakeholder on the Messaging Business...



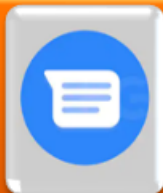
Option 1 : Make (Joyn : Past Lessons learned)

- Cost : x\$ Millions / Country – Upfront investment
- TTM : 40 Months delay
- Revenues on A2P monetization, Savings...



Option 2 : Buy

- Cost : x\$ Millions depending on the scale – Upfront investment
- TTM : 24 Months delay
- Revenues on A2P monetization, Savings...



Option 3 : Partner (Orange actual choice)

- Costs some x\$K per Market
- TTM : 6 months
- Revenues on A2P monetization, Savings...



Option 4 : RCS in OTT (Guest Cloud) Mode

- Cost : 0
- TTM : 0
- Revenues : 0

Key Partners for RCS P2P and A2P ecosystem

...Where 1+1 = 3



ASPIDER-NGI



SAMSUNG



Thank You !

