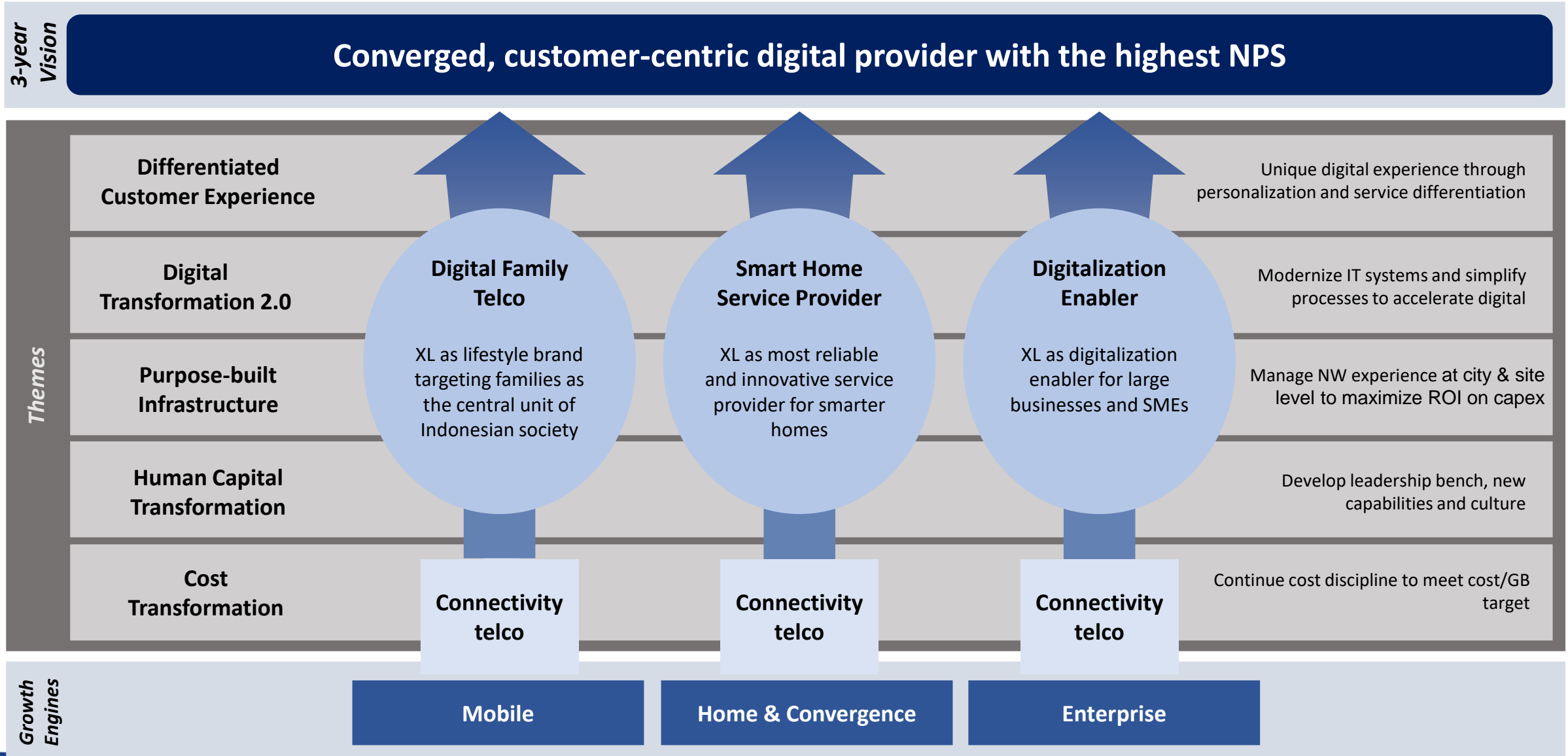




**Axiata Analyst & Investor Day 2021**  
**Converged Digital Telco**

**Dian Siswarini**  
**XL CEO**  
**8th December 2021**

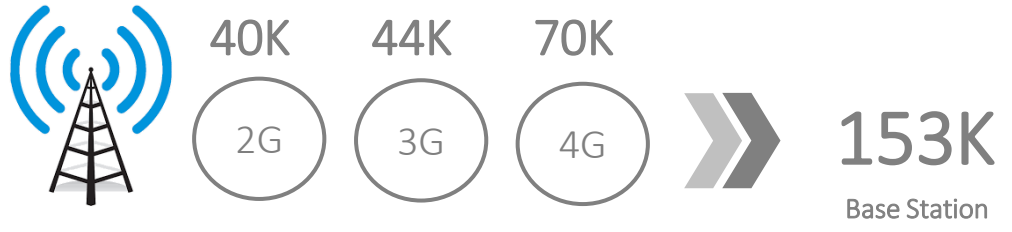
# Background – Our Strategic Framework aligns ourselves with Axiata’s 5.0 strategy



# Background – Increased network investment to compete with MergedCo is bearing fruit



## 4G BTS now at 70k with increased investment in ex-Java and new tech including 5G and VoLTE launched...



**16** 5G Locations  
 Located in Jakarta, Depok, Bandung, Surabaya, Jogja, Medan, Denpasar, Banjarmasin, Makassar & Others

**>100,000** Km  
 Site fiberization covering almost 50% of the total sites

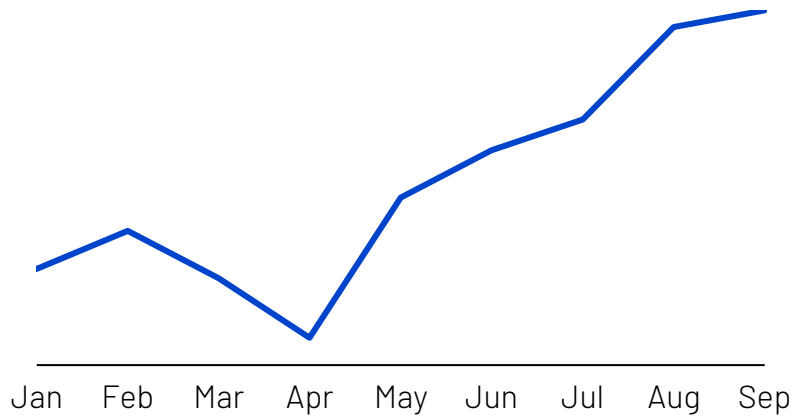
**227**  
 Cities

## ...with both external surveys and customer user experiences indicating we are on the right track



- The overall download speeds our XL users saw have increased by 1.3 Mbps (11.5%) to 12.6 Mbps
- XL enjoyed the **biggest increase in 4G Availability**, compared to their competitors.

Facebook User Throughput (Mb/Month)



**+15%**

increase in Facebook average user throughput from the start of the year (highest among the big 3)

1

**Digital Transformation 2.0**

2

**Differentiated Customer Experience**

3

**Convergence Journey**

1

**Digital Transformation 2.0**

2

**Differentiated Customer Experience**

3

**Convergence Journey**

**We face four  
new realities that  
change both how  
we do business and  
how we shape  
markets**



**New Reality #1  
Human Experience**

**Most activities to be online/virtual**



**New Reality #2  
Technology**

**Every business is now truly a technology  
business**



**New Reality #3  
Work**

- **Location & Time independent,  
Data driven.**
- **Hyper-automated to bring best in  
people**



**New Reality #4  
Sustainability**

**Technology intertwined with  
sustainability in operating business  
going forward**

# But XL is able to respond to the change across the organization



## Digital Touchpoint Revamp

**Apps rating >4.3  
(Android and iOS)**

**48% MAU Growth (YoY)**



## Digitalization

**8 Business functions -  
Finance, marketing, HC,  
Sales, CX, IT, Network,  
Corporate affairs**



## AI Augmentation

**Zero touch operation,  
RO performance insight,  
Network capacity  
intelligence**

# Today's focus themes

1

Digital Transformation 2.0

2

Differentiated Customer Experience

3

Convergence Journey





# XL BRAND HAS BEEN REPOSITIONED TO SERVE THE YOUNG FAMILIES OF INDONESIA



## **Biggest segment**

85mn families

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## **Relevant untapped opportunity**

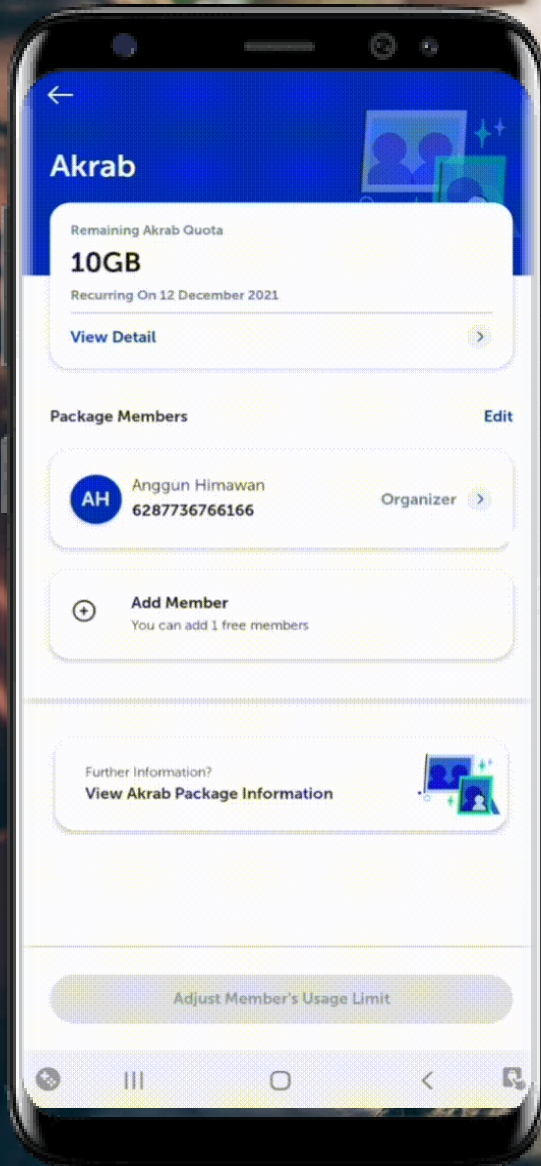
No operator and not many digital brands focusing on families yet in Indonesia

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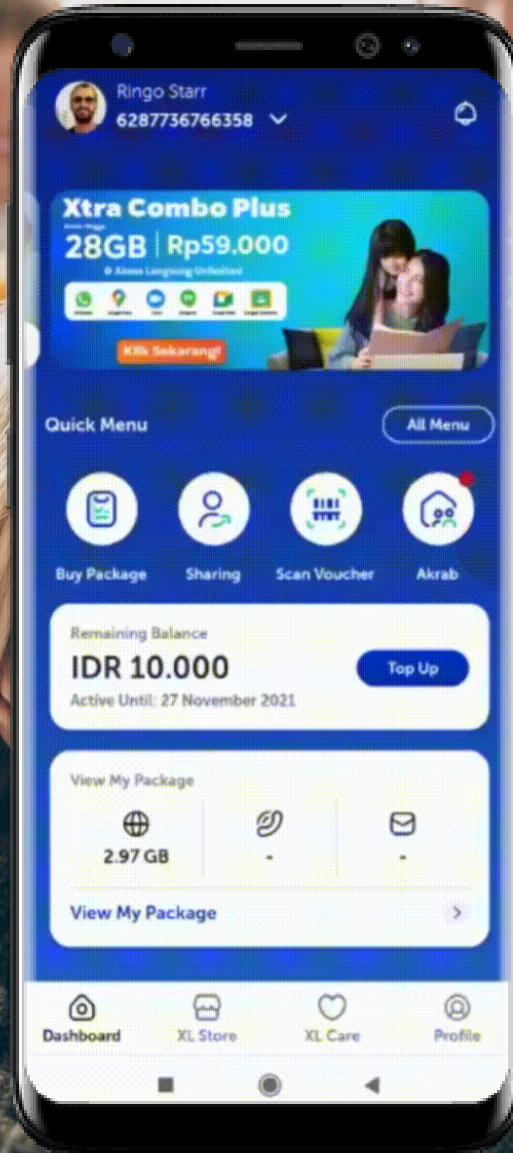
## **Forward looking**

Unaddressed needs in connectivity management, with growth of multi-device and blurring home/mobile boundaries

Organizer



Member



# WE ARE STARTING TO SERVE FAMILIES UNIQUELY

Akrab, single solution for the entire family, fully focused on experience differentiation

CONVENIENT – One Shared Plan for the Family

SIMPLE – Family & Quota Management in myXL

BEST VALUE – Get more when used as a Family

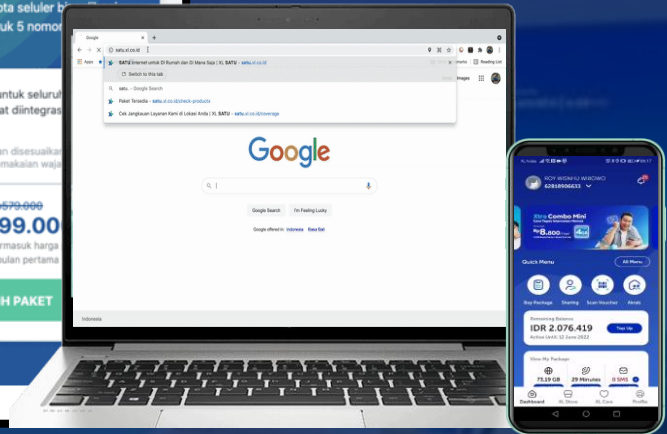
*"Saves me a lot of time & headaches reloading for my whole Family"*

*"Very useful especially for managing the two phones that I have"*

**XL SATU Fiber**      **XL SATU Lite**

XL SATU Lite adalah layanan Internet rumah super cepat dengan teknologi wireless broadband dan Kuota HP bersama untuk sekeluarga. Sangat mudah untuk digunakan dan menjangkau seluruh Indonesia.

Value	Smart	Family	Super User	Ultimate
Internet Rumah Super Cepat	Internet Rumah Super Cepat	Internet Rumah Super Cepat	Internet Rumah Super Cepat	Internet Rumah Super Cepat
<b>+ 15 GB</b> Kuota seluler bisa dibagi untuk 2 nomor	<b>+ 25 GB</b> Kuota seluler bisa dibagi untuk 2 nomor	<b>+ 50 GB</b> Kuota seluler bisa dibagi untuk 3 nomor	<b>+ 100 GB</b> Kuota seluler bisa dibagi untuk 4 nomor	<b>+ 100 GB</b> Kuota seluler bisa dibagi untuk 5 nomor
Paket internet untuk kebutuhan keluarga kecil mulai dari browsing, social media, hingga shopping	↑ Tingkatkan produktivitas dengan koneksi cepat untuk belajar online dan WFH	Penuhi kebutuhan streaming keluarga dengan internet super cepat	Rasakan kecepatan koneksi maksimal untuk kebutuhan internet keluarga mulai dari streaming hingga game online	Internet super cepat untuk seluruh orang yang dapat diintegrasikan ke perangkat sekaligus
* Kecepatan internet akan disesuaikan setelah melewati FUP / batas pemakaian wajar sebesar <b>30 GB</b>	* Kecepatan internet akan disesuaikan setelah melewati FUP / batas pemakaian wajar sebesar <b>60 GB</b>	* Kecepatan internet akan disesuaikan setelah melewati FUP / batas pemakaian wajar sebesar <b>120 GB</b>	* Kecepatan internet akan disesuaikan setelah melewati FUP / batas pemakaian wajar sebesar <b>200 GB</b>	* Kecepatan internet akan disesuaikan setelah melewati FUP / batas pemakaian wajar sebesar <b>300 GB</b>
<del>Rp150.000</del> <b>Rp129.000</b>	<del>Rp244.000</del> <b>Rp199.000</b>	<del>Rp350.000</del> <b>Rp299.000</b>	<del>Rp470.000</del> <b>Rp399.000</b>	<del>Rp570.000</del> <b>Rp499.000</b>
* Harga belum termasuk harga perangkat pada bulan pertama	* Harga belum termasuk harga perangkat pada bulan pertama	* Harga belum termasuk harga perangkat pada bulan pertama	* Harga belum termasuk harga perangkat pada bulan pertama	* Harga belum termasuk harga perangkat pada bulan pertama
<b>PILIH PAKET</b>	<b>PILIH PAKET</b>	<b>PILIH PAKET</b>	<b>PILIH PAKET</b>	<b>PILIH PAKET</b>



# FOUNDATION FOR OUR CONVERGENCE PLAY

- Fixed & Mobile Broadband Solution in One Bill
- Best Value for Whole Family
- All Manage in One Digital Experience

# Today's focus themes



1

Digital Transformation 2.0

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# Convergence – Journey to become a Fully Converged Operator



## Build Up Home



### Our organic roll-out of Fiber-to-the-Home started in 2019

Today we have more than 650k homes passed.




With a connection rate of 30% for our own footprint

## Product Launch

The 1<sup>st</sup> true convergence proposition in Indonesia



### Promising result from initial rollout

-  23% of Home Acquisitions are contributed by XL Satu
-  10% higher ARPU compared to XL Home Fiber
-  48% of XL Satu customers are utilizing their Convergence Sim Card

## Scale-Up



### Scale-up of the FTTH footprint

Fiber Penetration in Indonesia is still low

Scale up of our FTTH footprint & supported by a converged product strategy – we can win in this market

## Our Convergence Journey Today

# Is The Key For The Future



### Digital Service Differentiation

Set the foundations to serve families and address pain points.



### Household Orientation

First to launch convergence, XL satu amongst few end-to-end digital solutions.



### NPS

Catch-up with TSEL despite network/price gap.



### Digital Service Differentiation

Partnership-driven enhancement of family proposition to drive differentiation.



### Household Orientation

Lead the convergence market and gain scale.



### NPS

Lead within teleco because of service attribute.



### Digital Service Differentiation

Ecosystem enabler for the families.



### Household Orientation

>60 of XL Revenues.



### NPS

Lead benchmarking to digital companies.

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*Thank You!*

