

Zain
Jordan

modernizes

its value-added
mobile content
services

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A TECH MAHINDRA COMPANY



Who: Zain Jordan

What: Modernized legacy content systems and services to deliver operational and commercial efficiencies

How: By rationalizing the number of content partners, bringing in better quality checking, enforcing policy and streamlining content using Comviva's Digital Service Delivery Platform

results:

- Content partner ecosystem has been optimized
- Revenues have grown by 20%
- Activations have increased 30% year on year
- Time to market for new services has halved



watch now

overcoming legacy operations to add value for customers

When we talk about “legacy” in businesses we are normally referring to the spaghetti IT that continues to slow down even the larger, more successful telecoms operators and groups. We don’t normally think of legacy as something that stifles the evolution of telecoms operators’ content businesses.

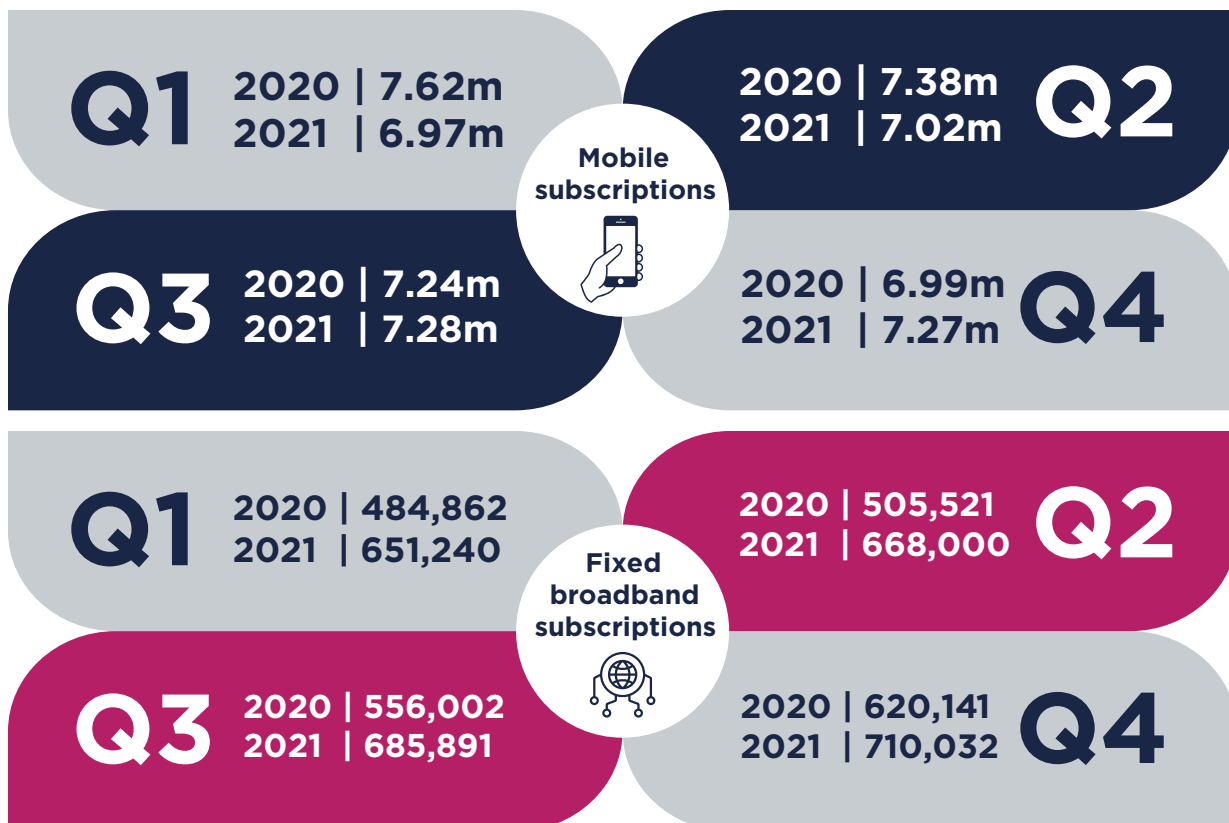
But legacy was precisely the problem that Jordanian telecoms operator Zain faced in 2018 when it brought in mobility solutions provider Comviva to modernize its value-added services strategy and systems. Now nearly four years later the partnership has proved fruitful, delivering considerable operational and commercial efficiencies.

The term “value-added services” might seem outdated for operators (and their customers) in Europe and North America, where most of the population have access to the Apple and Google apps stores and the new breed of video platforms including Netflix, Disney Plus and Apple TV. But in Jordan, even though a large proportion of the population has access to 4G devices, access to local, regional and global content is still relatively limited. As such mobile operators continue to play an important role in the provision of information and entertainment services to mobile devices.

The Jordanian mobile market has three operators. The market is saturated – there are 1.05 SIM cards for every person in the country – and ARPU remains flat at around \$10 per month. Three out of four mobile users are on prepaid price plans. All three operators offer LTE services but are yet to launch 5G.



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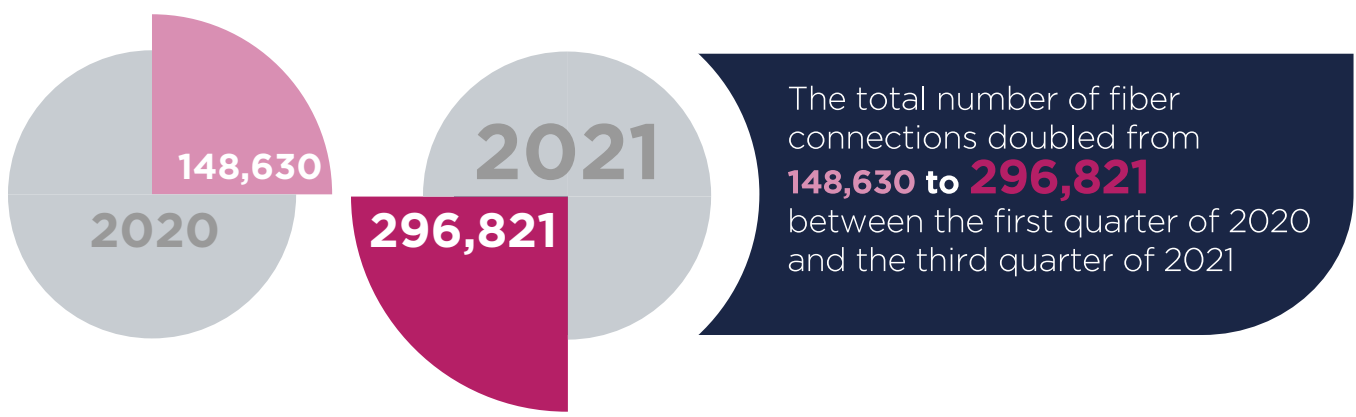
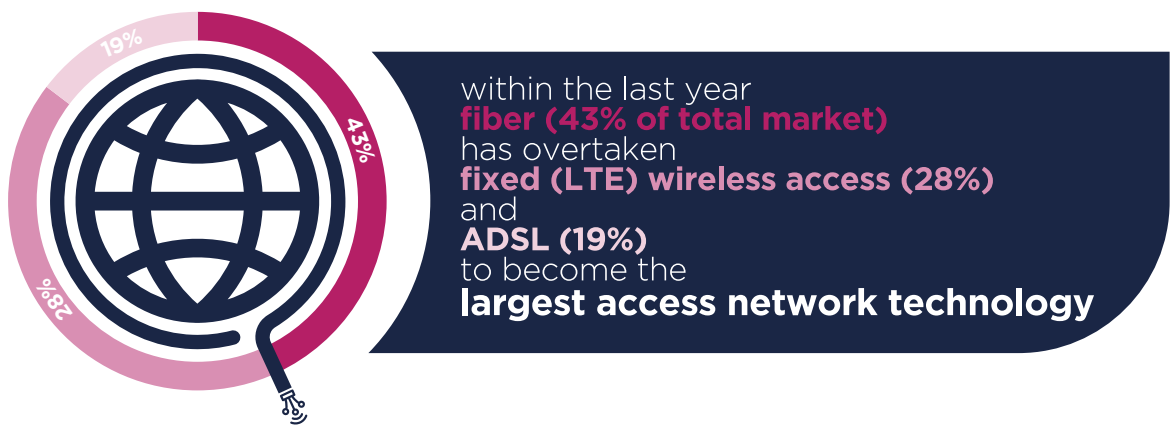
TM Forum, 2022 (Source: Telecommunications Regulatory Authority of Jordan)

In the past two-to-three years all operators have expanded in the home broadband market. The total number of fiber connections doubled from 148,630 to 296,821 between the first quarter of 2020 and the third quarter of 2021. Within the last year fiber (43% of total market) has overtaken fixed (LTE) wireless access (28%) and ADSL (19%) to become the largest access network technology. All three operators offer fiber-to-the-home services, and the availability of fiber connectivity has been boosted by partnerships such as the one between Umniah and JEPSCO, the country's state-owned electricity utility, to build a wholesale fiber network.

But mobile remains the dominant access technology both for voice and broadband communications. Jordan has seven fixed broadband connections for every 100 people, which is roughly equivalent to one fixed broadband line for every household. Indeed, this likely overstates fixed broadband household penetration because this number includes business lines.

While consumers in most parts of Europe, North America and across much of Asia source their mobile content from Google Play or Apple's App store, there remains a solid market for operator services in Jordan. While the main focus for Orange is developing its mobile money business - Orange offers a full range of mobile money and mobile wallet services - Zain Jordan remains committed to the mobile content and applications market which continues to generate 3% of its total mobile revenues. Zain Jordan also provides mobile wallet and electronic payment services through [ZainCash](#).

Zain Jordan offers its services through its Zoom portal. Categories include premium video (international and Islamic), Android applications, online gaming, music, and a diverse selection of information service categories including healthcare, sports, financial information, and educational and religious content. The services are designed to appeal to all different ages and demographics.



Zain recruits Comviva to deliver operational and commercial efficiencies

In 2018 Zain brought in Comviva to help improve the commercial, technical and operational performance of its value-added services business. The core product delivered by Comviva to help host and manage its content partner relationships was its Digital Service Delivery Platform (DSDP2.0). Comviva also delivered a new flexible charging system with robust embedded security.

But a large part of the value delivered by Comviva was its expertise in business operations and digital content, its ability to evaluate the complex ecosystem, analyze the core strengths of Zain, and build and execute a strategy to bring all-round growth. Since 2018 Comviva has, effectively, been part of the Zain Jordan business, running the relationships with its content partners. “We see Comviva as part of our internal team,” says Marwan Jaber, Manager CVM, VAS and Prepaid Segment Marketing, at Zain Jordan.

Since 2018 Zain Jordan has been working on focusing more on its core digital services portfolio and shedding legacy services. This approach to simplification reduced the number of content partners that Zain Jordan was working with, but it also brought in greater focus from partners that were now benefitting from a larger share of the pie. As a result, the partners have increased their marketing efforts as well as content quality.

Comviva, along with its products and technology, also brings a 200+ strong partnerships network with globally leading content providers. This is a big plus for relatively small telcos that find it difficult to recruit large or leading content and services partners. Comviva continues to introduce Zain to potential new content partners and make additions to the services portfolio.

Zain customers have a number of different ways to pay for content. They can purchase individual services or pay for content on a daily, weekly or monthly basis using their telco wallet. Zain also offers direct operator billing services to both its prepaid and postpaid customers. It means that customers can pay for content quickly and easily without having to enter credit or debit card details.

Since Zain recruited Comviva the performance of its value-added services business has improved dramatically. Revenues have grown by 20%, activations have increased 30% year on year and time to market for new services has fallen by half. The number of customer complaints has fallen dramatically. Comviva has also helped Zain to secure more preferential revenue-share agreements with its content partners.

Looking ahead, Zain Jordan will continue to make improvements to its value-added services business as it seeks to build incremental revenues and, in the words of Jaber, to improve the customer journey. When it comes to offering advice to other operators reviewing their value-added services business, and where to make operational and commercial improvements, Jaber recommends rationalizing the number of content partners at an earlier stage in order to simplify the process of deploying the new platform and onboarding existing and new partners.



We see Comviva as part of our internal team.

Marwan Jaber
*Manager CVM, VAS and
Prepaid Segment Marketing*
ZAIN JORDAN

Zain Jordan in numbers (Q42021)



mobile ARPU
US\$11
per month

total customers
3.6m
(mobile, fixed broadband and ZainCash)

total revenues

US\$500m

EBITDA

US\$230m

net Income US\$132m



Source: Zain



about



Comviva is changing the world through digital experiences. Our innovative portfolio of digital solutions and platforms brings greater choice, faster time to market, and flexibility to meet our customers' evolving needs better as they drive growth, transform, and bring efficiency. From maximizing customer lifetime value to enabling large-scale digital transformation, we partner globally with communications and financial industry organizations to solve problems fast and transform for tomorrow.

Comviva solutions have been deployed by over 130 Communication Services Providers and Financial Institutions in more than 90 countries. They have delivered the benefits of digital and mobility to billions of people around the world.

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