



BUSINESS STRATEGY

At the end of 2022, Kazakhtelecom adopted a new JRun development strategy for 2023-2032.

The key goal of JRun strategy is to lead the Kazakhstan market by improving customer experience.

Strategic directions of the Company's development are named in simple and clear words in the Kazakh language that inspire confidence among the Company's customers, employees and stakeholders.

JRUN STRATEGY

MISSION

Become an irreplaceable and usual part of everyone's life, changing, surprising and exceeding expectations.

VISION

A leading Kazakhstan integrated service provider in the information communication market.

J AQIN

BI **R** LIK

ALA **U**

ORKE **N**



Obsession with the client

Leading the telecom market by improving the customer experience



Unity in a changing environment

Success through improved employee experience



Continuous renewal

The engine of economic growth and competitive innovation



Sustainable growth

First-class business management and better infrastructure

STRATEGIC GOALS FOR 2022–2027

J AQIN

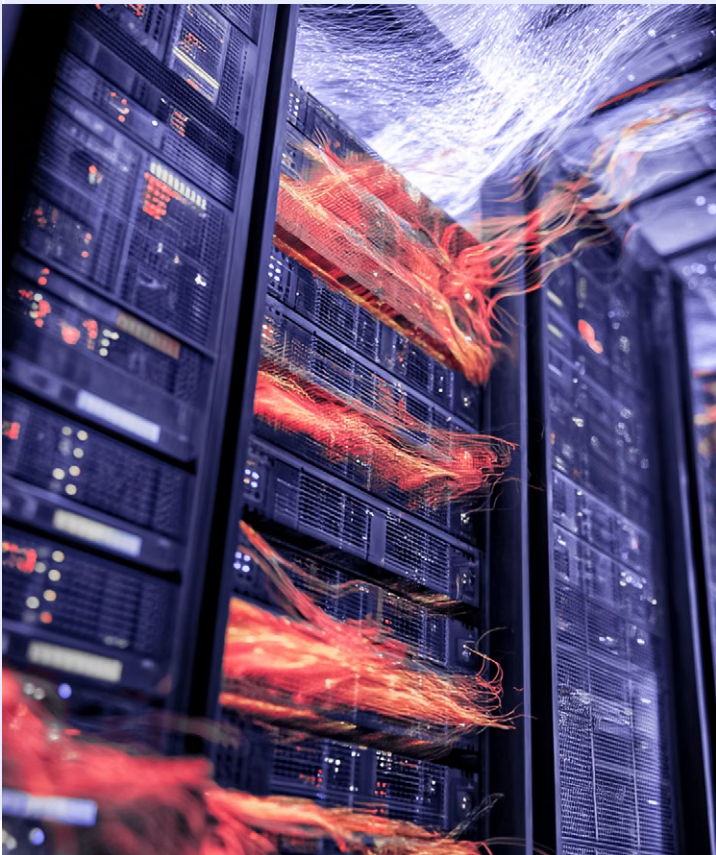
Obsession with the client

- Leadership in quality of the last mile in the B2C market cities from 200 Mbps rural communities from 20 Mbps
- Become No.1 Operator by customer experience in the B2C segment Best NPS among fixed operators
- Protecting the leading position on the B2C broadband and TV market 72–74% broadband access TV 45–50%
- Strengthening the leading position in terms of revenues on the B2X market 50–52% B2X market
- Become No.1 Operator in terms of customer experience in the B2B segment Best NPS among fixed operators
- Solid growth in the ICT segment and selected new business lines +14% in revenues

BI **R** LIK

Unity in a changing environment

- Social stability index in the favorable zone
- SRS (Happy Index) 75%
- eNPS 70%
- engagement 85%
- Loyalty 65%
- EJM (Employee satisfaction at each stage of life cycle) in % (measurement required)
- IR (high standards in industrial relations)



ALA **U**

Continuous renewal

- Data management as an asset
- Sales and churn management
- External data monetization
- Optimization of internal processes
- FCF from Big Data by 2027 – KZT 6.5 billion
- Enhancing operational efficiency through AI
- Improving customer service quality and increasing customer loyalty
- Increasing marketing campaign effectiveness and reducing advertising costs
- Automation of internal processes and improvement of labor productivity
- Migration of network and IT infrastructure to the cloud environment
- Reducing the share of equipment operating for over 10 years to 15% by 2024
- 99.9% – availability of IT platforms and digital sales channels
- Transition to microservice architecture
- Development of Telco Cloud infrastructure based on SDN/NFV platform
- Digital transformation of the business
- Reducing time-to-market by 2 times
- Lowering scaling costs
- Provision of digital and cloud services (IaaS/PaaS)
- Entering new markets

ORKE **N**

Sustainable growth

- Creating conditions for the transition to a Gigabit Society Achieving 18 core nodes* on 100G interfaces
- Meeting customer expectations for access speed ≈500 thousand clients (households)
- Operational efficiency at the level of industry leaders ≈KZT 8 billion – impact on EBITDA for 2023–2032
- Establishment of a Tower Operator
- Implementation of the ODN project, management of Kazakhtelecom’s tower infrastructure (AMS), synergy with projects 50+ and BSIP
- Automation of the supply chain and digitalization of SSC processes Minimization of routine operations
- Achievement of ESG rating targets
- Reduction of net carbon footprint by 13% by 2032
- Rating: BBB (2024), A (2027)



SUMMARY REPORT ON THE RESULTS OF THE STRATEGY IMPLEMENTATION IN 2024

Direction	Goals of the Strategy	Result 2024
Protecting the leading position on the B2C broadband and TV market	72%–74% broadband access	71% broadband access
	45–50% TV	50% TV
Strengthening the leading position in terms of revenues on the B2X market	50–52% of B2X market	44% of B2X market
Become No.1 Operator by customer experience in the B2C segment	Nº1 in segment	17% (2nd position)
Become No.1 Operator by customer experience in the B2X segment	Best NPS	15% (3rd position)

