



E-COMMERCE INSIGHTS AND BEST PRACTICES — 2016 —

In Partnership with



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FOREWORD



Nadim Samara

OMD Managing Director
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In the MENA region, e-commerce dominates the digital landscape, with Souq.com becoming the first billion-dollar internet company, and more than 2/3 of tech investment dollars going into transactional businesses. Marketplaces for services, from transportation to food delivery, are also growing exponentially, creating some of the most valuable startups globally, and disrupting entire sectors in the process. This is true in MENA as well, with Talabat.com swooped up by Rocket Internet Group for \$170M just last year. Beyond pure e-commerce platforms, e-commerce is gaining importance as a channel for all types of traditional business - from banks to FMCGs. Corporations across industries are investing in and experimenting with new ways of providing on-demand fulfillment of customer needs.



Omar Christidis

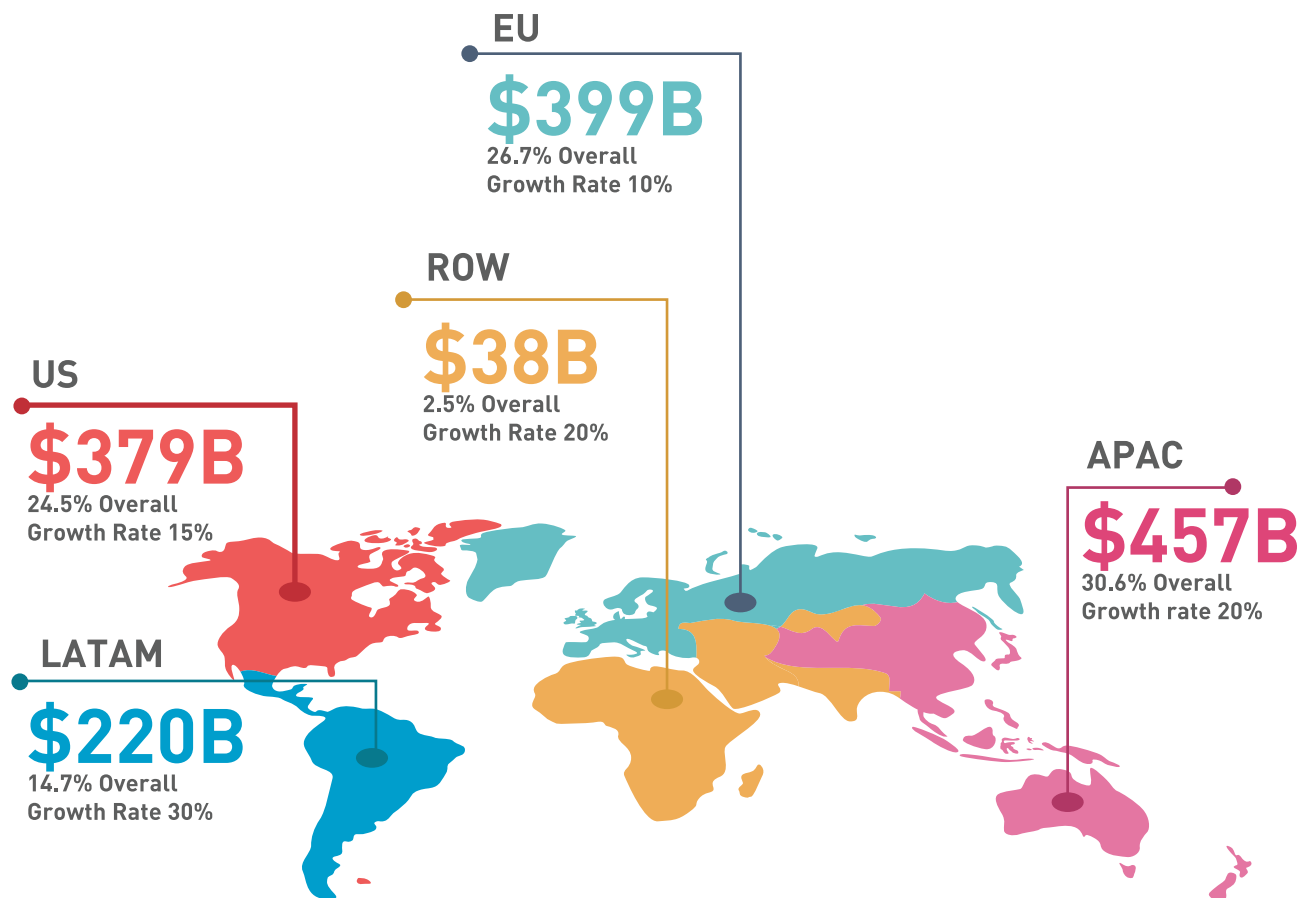
ArabNet Founder and CEO

With this report, OMD and ArabNet aim to provide brands and decision makers with the insights and best practices as to develop their e-commerce strategies and plans. The research is based on a survey of 13 executives from some of the top e-commerce companies in the MENA region, across both e-retail and service marketplaces. The research investigates the main social media channels, mobile strategies, as well as logistics and payments' best practices adopted by e-commerce players, in addition to exploring consumer behavior and the purchasing cycle. It also looks at the top future challenges and trends facing e-commerce businesses in the region.

The report is by no means comprehensive, and we hope to present more data and tackle more e-commerce questions in the future. With a relatively small sample size, the statistics in this survey should be considered as indicative of the broader market trends but not exact figures for market sizing / analysis. We hope that this report gives you insights that will help shape your outlook and/or business strategy. We also look forward to hearing your feedback and ideas for new areas that the report should cover, so we can ensure it is most beneficial to you.

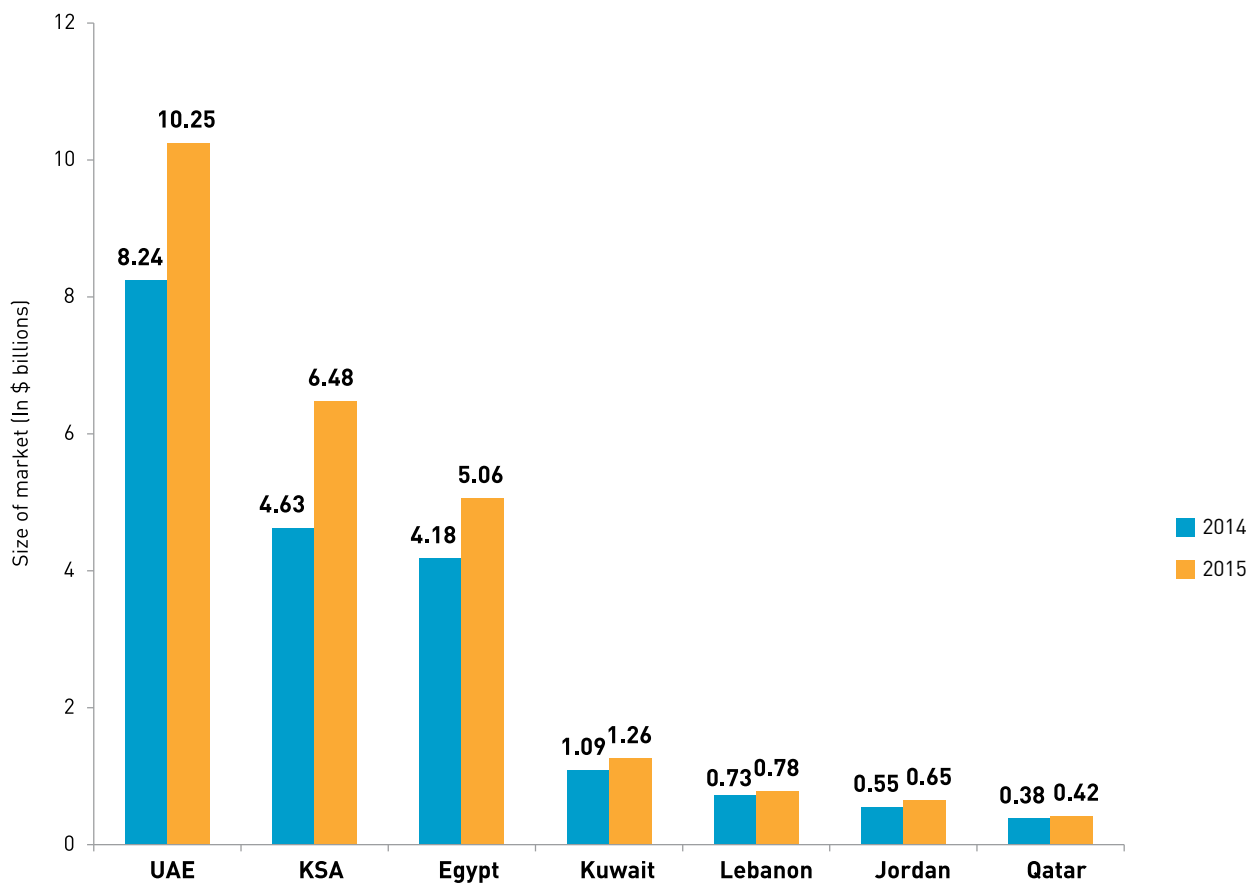
BACKGROUND INFORMATION: E-COMMERCE GROWTH

FIGURE 1: GLOBAL E-COMMERCE MARKET



The global market for e-commerce will reach \$1.5 trillion in 2017, according to Forrester and ChannelAdvisor estimates, with growth rates in emerging regions like Latin America, Africa and the MENA region expected to reach 20-30%. It is notable that MENA, Africa, Central Europe, and India combined represent only 2.5% of the global e-commerce market, indicating the tremendous growth opportunity in the region.

FIGURE 2: MENA E-COMMERCE MARKET



In MENA, the e-commerce market grew by 23% in 2015 to reach a total size of \$39B, according to Payfort's State of Payments 2016 report; with the number of online buyers increasing by 14% in the past year. Payfort estimates that the market will grow to \$51B across the region by 2017.

THE STUDY: OBJECTIVE & METHODOLOGY

As companies across industries seriously consider e-commerce as a new channel, OMD and ArabNet have launched this study to elicit insights and develop best practices for companies interested in this channel. The study investigates the key social media platforms used by regional e-commerce players, along with each platform's objectives, their digital marketing and advertising efforts, the use of mobile ads and mobile apps, the different stages of the purchase cycle, and finally, the opportunities and challenges they face. The survey does not however include search engine marketing / advertising, which is a much broader topic requiring a set of extensive research questions outside the scope of this report.

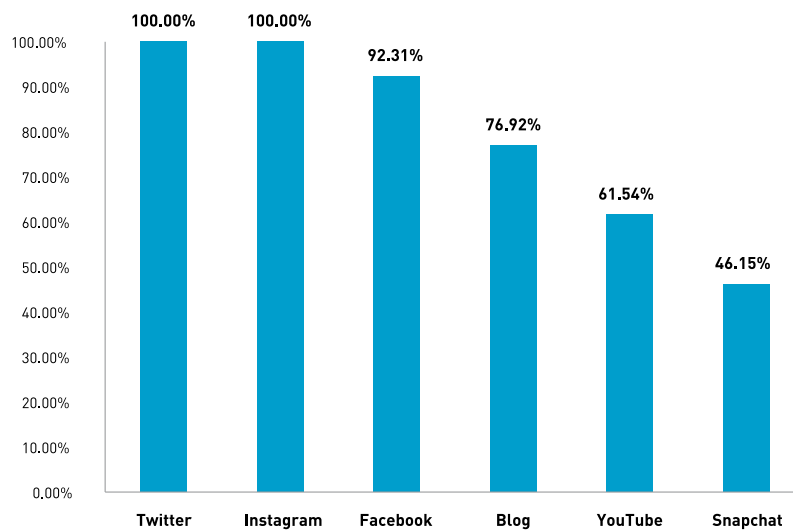
The study is based on a survey conducted with 13 e-commerce companies and service marketplaces in the Middle East, across a range of products – from electronics to transportation services. Interviews were conducted with CEOs, Founders, VPs, and CMOs to explore the topic further and gain additional insights when possible. OMD and ArabNet thank the following companies for sharing their time and insights: Virgin, Xcite, Careem, Uber, Namshi, MarkaVIP, JadoPado, Talabat, Bookwitty, Meltoo, MiniExchange, eCommerce Sea, and ReserveOut.

Given the survey is based on a set of 13 interviews, the size of the sample does not allow for significantly precise statistical analysis. Where provided, statistics in this report should be considered as indicative; they can however provide readers with a sense of the key strategies pursued today by the region's leading e-commerce players, the majority of whom are included in the survey (with the key exception of Souq.com).

SOCIAL MEDIA: MARKETING & ADVERTISING

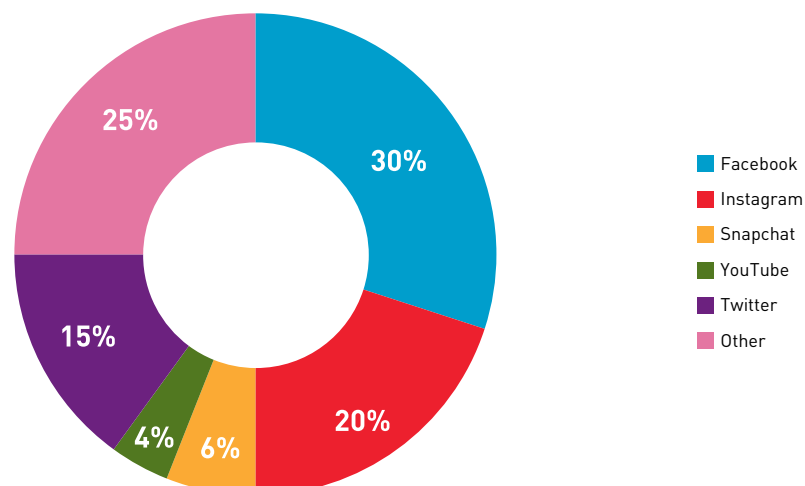
As a start, the survey investigates the key social media channels used by e-commerce players for both organic and paid reach, and how they distribute their marketing activities and digital advertising investments across these platforms.

FIGURE 3: SOCIAL MEDIA - ORGANIC



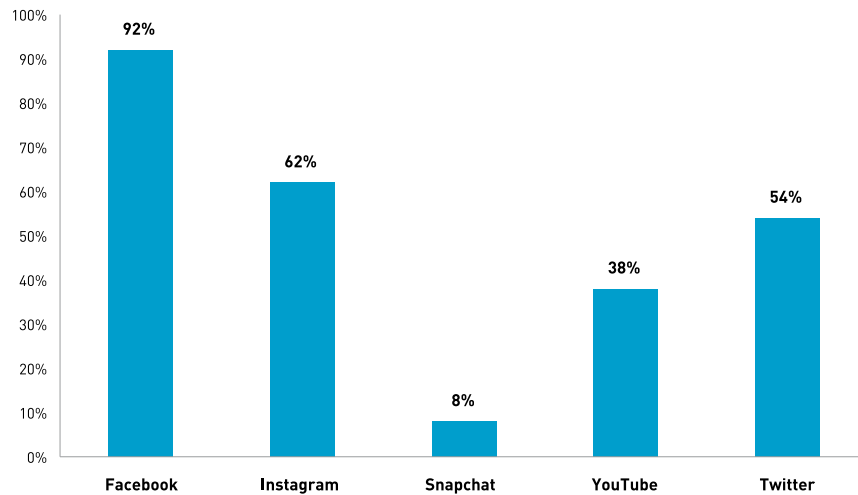
The survey results clearly indicate that Facebook, Twitter and Instagram are the key social media channels used organically by almost all e-commerce players. Only one respondent – based in Saudi Arabia – mentioned that Facebook was not an important platform for them. A number of respondents highlighted that Twitter is the key channel for Saudi Arabia, where the Arabic language dominates the platform; one of the respondents claimed that Arabic dominates over 70% of its user interactions in the Kingdom. It is interesting to note that almost half of the e-commerce companies surveyed are using Snapchat, and many have only recently started experimenting with the platform.

FIGURE 4: MARKETING ACTIVITIES DISTRIBUTION



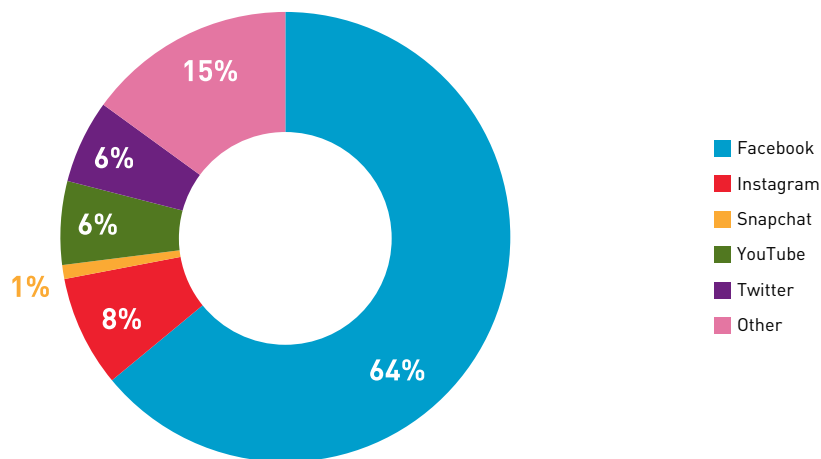
While many of the e-commerce companies surveyed are using all social media platforms for organic posting, the distribution of activities is skewed quite heavily towards Facebook and Instagram, followed by Twitter. YouTube and Snapchat are being used much more selectively for a smaller scope of activities, elaborated further below.

FIGURE 5: ADVERTISING PLATFORMS USED



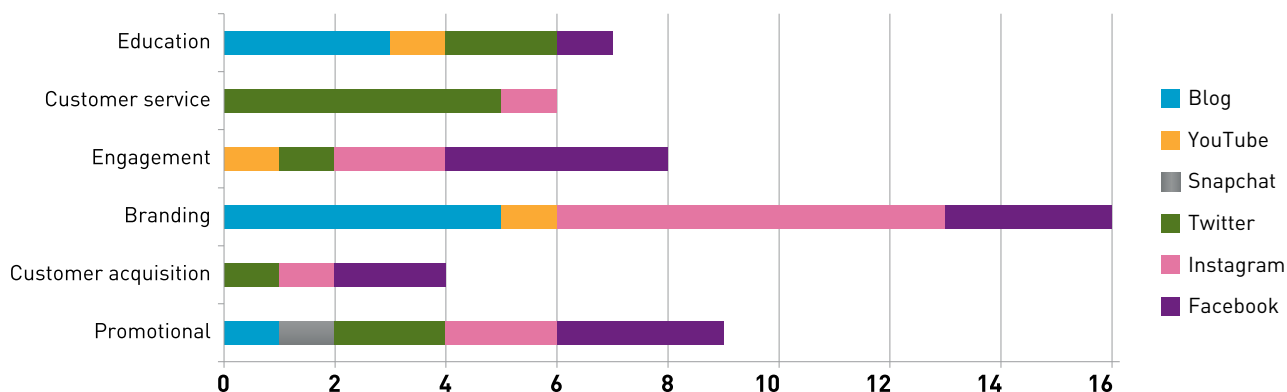
While survey respondents tend to have an organic presence on most social media platforms, their paid media investment appears much more focused, with Facebook as the most commonly used channel by 92% of survey respondents. Instagram and Twitter are the secondary channels used for paid media, with roughly half of survey respondents stating they advertise on both channels. The largest gap between paid and organic channel use is Snapchat, where paid advertising has only recently been introduced; it is however interesting to note that one of the survey respondents is already experimenting with Snapchat paid advertising.

FIGURE 6: ADVERTISING INVESTMENT DISTRIBUTION



The dominance of Facebook as a paid channel is even more evident as we dive further into the distribution of advertising investments by channel. Here, survey respondents indicate that Facebook is capturing about 2/3 of digital ad spend, with significantly smaller (and roughly equal amounts) being spent on Instagram, Twitter and YouTube. The 'Other' category (15%) is dominated by search, and appears small given the importance of search, especially for conversion in e-commerce marketing.

FIGURE 7: OBJECTIVES ON EACH SOCIAL MEDIA PLATFORM



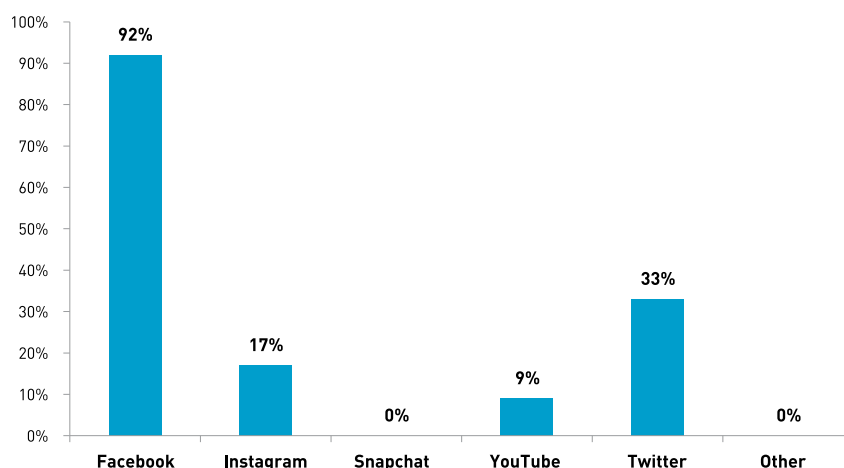
After establishing the main social media channels for organic and paid reach, the survey investigates the key objectives for each platform.

Facebook, Twitter, and Instagram tend to be the most versatile channels, used for the most diverse set of objectives; however, the focus for Twitter is customer service and the priority on Instagram is brand building. The key channel for customer engagement is Facebook followed by Instagram, where Instagram is often used to sell a lifestyle through trendy images and content.

YouTube is used sporadically, and in a different manner by survey respondents – including educational content, as well as videos for branding and engagement.

Most e-commerce players surveyed have a corporate blog, where they do content marketing for brand building and consumer education. With respect to the latter, the focus is on explaining how e-commerce works and enhancing customer knowledge on products and services. For brand building, a large part tends to feature storytelling about the company and its services, adding a human component to the brand, which helps build an emotional connection.

FIGURE 8: KEY CHANNELS FOR CONVERSION

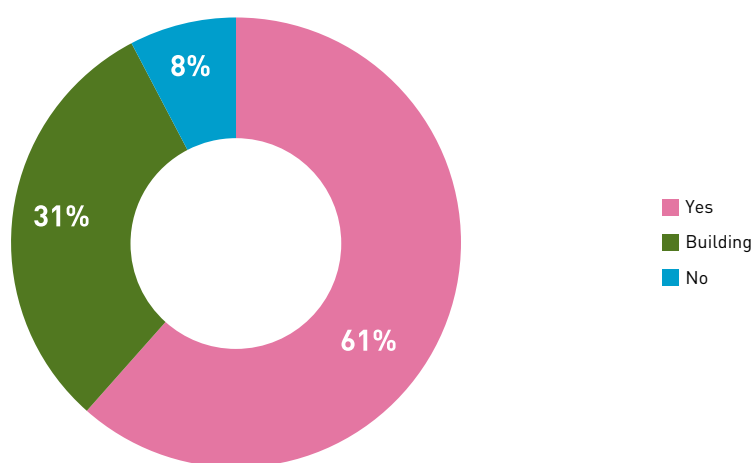


Facebook, Twitter and Instagram are also the key channels used for customer acquisition, with Facebook being the key driver of conversions followed by Twitter.

MOBILE

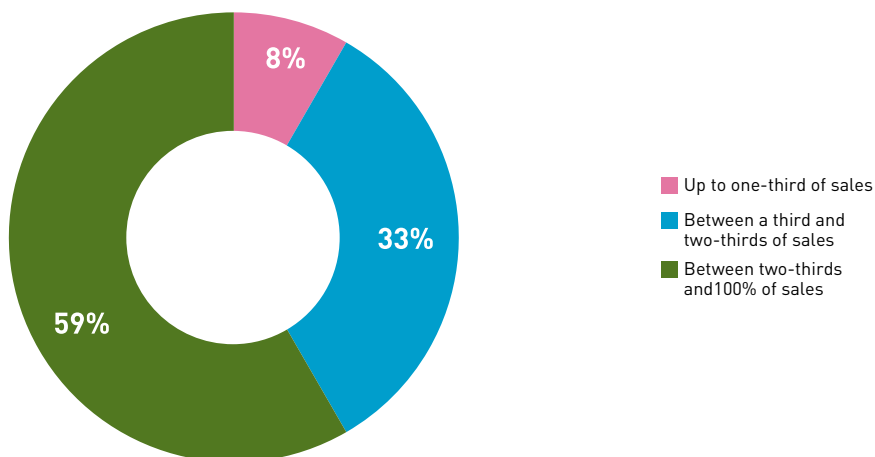
The surveyed e-commerce players highlighted that millennials are heavy consumers of technology who prioritize speed and convenience, with mobile at the center of their user interactions. All respondents said that mobile strategy is key and are focusing their efforts in that area.

FIGURE 9: E-COMMERCE PLAYERS WHO HAVE A MOBILE APP



The mobile strategy for most respondents is app-centric: over 60% of respondents have a mobile app and another 30% are currently building one. Respondents agreed that the user experience of the app is critical, with respect to the ease / speed of set-up and check-out, while compelling full-screen visuals are key design priorities. A number of retailers mentioned that they are looking closely at how their mobile app experience integrates with other channels, namely website and social media.

FIGURE 10: PERCENTAGE OF ONLINE SALES DRIVEN THROUGH MOBILE



Mobile is one of the largest and fastest growing sales channels for many e-commerce players, with the majority of respondents stating that mobile drives over 2/3 of their online sales. Mobile is such a key channel that one respondent exclaimed, "if it doesn't work on mobile, we don't do it."

FIGURE 11: MOBILE ADS USAGE

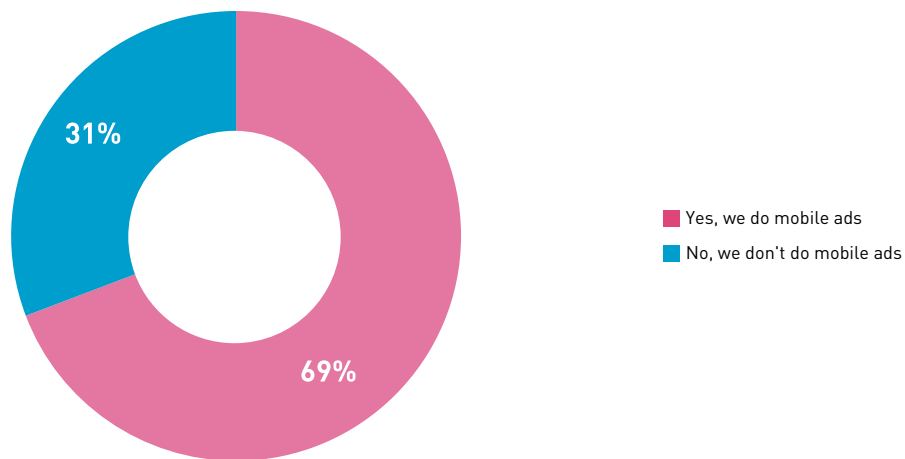
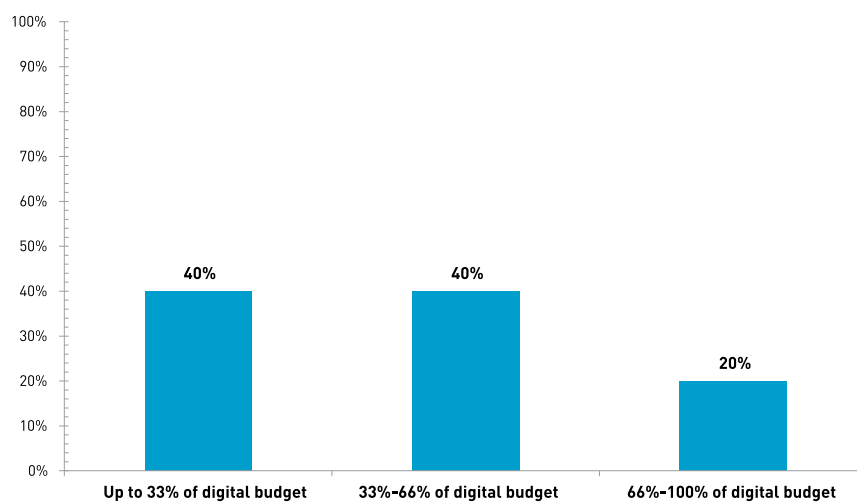


FIGURE 12: PERCENTAGE OF DIGITAL BUDGET ON MOBILE ADS



Approximately 70% of respondents spend on mobile ads, but the distribution of investment differs quite significantly between players. 40% stated that they spend a third or less of their digital budget on mobile ads, whereas, another 40% spend between one-third and two-thirds. It is interesting to note that 20% of respondents spend more than two-thirds of their online budget on mobile ads.

PURCHASING AND LOGISTICS

In this section, the survey takes a close look at the e-commerce purchase cycle and the fundamental consumer behavioral differences seen in the e-commerce space across markets.

FIGURE 13: PURCHASE CYCLE



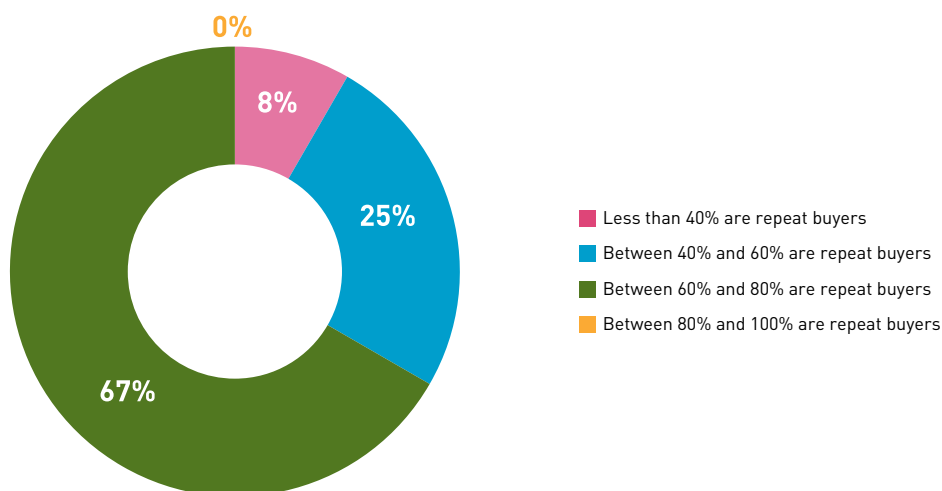
AWARENESS

With regards to awareness, the majority of the surveyed e-commerce players create targeted ads for each stage of the purchase cycle, based on consumer navigation, as well as to stimulate use in the case of long absence, during holidays and for activation. Age does not seem to be a key conversion factor when engaging with ads: most survey respondents mentioned that younger people do not convert more easily, and – as mentioned previously – many of the companies do not track the age of their customers. One caveat to this is that millennials are more open to considering and making purchases online.

CONSIDERATION & PURCHASE

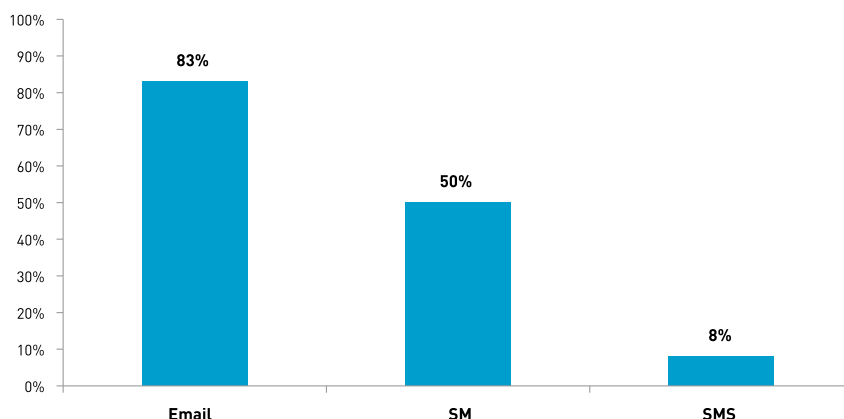
A number of respondents highlighted that millennials are highly informed, more likely to read reviews, and look for deals during this stage of the cycle. Most users tend to make a purchase on their first 2 visits to the site, roughly within the first 3 days to 1 week of their visit. The average order value for fashion and general retailers tends to be around \$100-\$150, whereas the average order value for services and consumable e-commerce players is \$15 to \$30. To increase the average order value, the majority of retailers focus on pushing additional purchases by promoting related products or via bundling. Many retailers also endeavor to increase the average order value by focusing on shipping: either by placing minimum orders for shipping or by having a free shipping threshold.

FIGURE 14: PERCENTAGE OF REPEAT CUSTOMERS



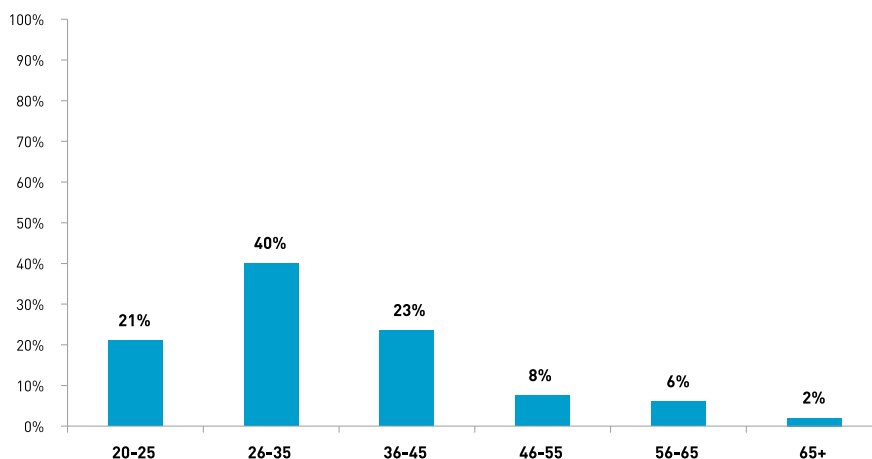
Repeat purchase rates are rather high; with respect to quick consumable goods and services, consumers often repurchase within 2 weeks. All retailers say that at least 40% of e-commerce consumers are repeat buyers, with the majority stating that the number exceeds 65%.

FIGURE 15: CHANNELS FOR LOYALTY INITIATIVES



All surveyed e-commerce players have loyalty initiatives; the majority use email as their primary channel and social media as a secondary one, to communicate their initiatives, as well as for customer relationship management. The loyalty programs provide incentives based on the purchase amount, exclusive deals for subscribers, free credits, and referral schemes.

FIGURE 16: CUSTOMER PROFILE



One of the most surprising findings of the research is that many of the e-commerce companies surveyed do not gather data about the age of their customers, and do not have age-specific strategies or strategies that specifically target millennials. From a sub-sample of three survey respondents that provided this data, it seems that the largest proportion of customers are millennials, 20-35 years of age, representing almost 2/3 of the customer base. The slightly older age group of 36-45 years represents about a quarter of the customer base, and forms an important segment.

Moreover, based on a sub-sample of four survey respondents, the gender of e-commerce buyers seems to be split equally, and may differ marginally according to product offering – for example, a fashion retailer shared that 60% of their customers are female, whereas an electronics retailer claimed to have 45% female customers only.

FIGURE 17: BEHAVIOR ACROSS MARKETS



While survey respondents did not share quantitative differences between customers across markets, they did share qualitative descriptions based on their experience. For example, one retailer emphasized the importance of the Arabic language in Saudi Arabia, and more specifically the use of colloquial dialect. Another respondent commented on the high-fashion and high-price purchasing behaviors in Kuwait; yet another highlighted that UAE customers are the most demanding in terms of product offering.

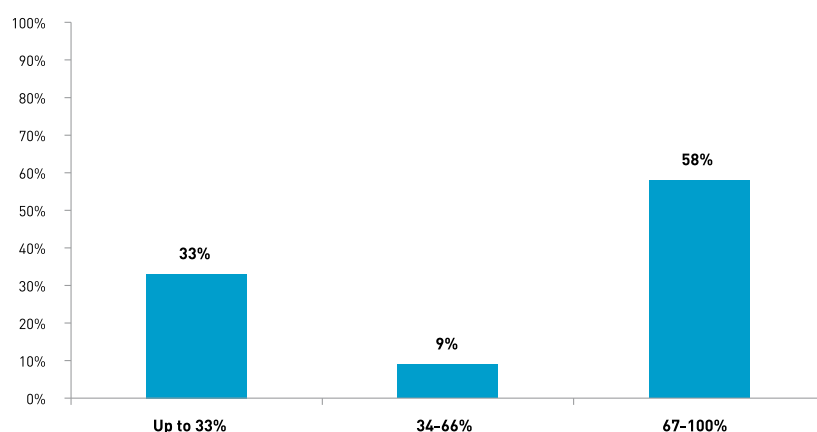
FIGURE 18: PAYMENTS, RETURNS, AND SHIPMENTS



PAYMENTS

With regards to payments, survey respondents emphasized that "cash in MENA is king". For the majority of e-commerce companies surveyed, more than 2/3 of their payments are made in cash. It is however interesting to note that there is a significant minority of companies that do minimal cash transactions, some of whom choose to discourage or refuse payment by cash.

FIGURE 19: PERCENTAGE OF CASH TRANSACTIONS



Many survey respondents highlighted that cash on delivery is a challenge since customers tend to change their minds at delivery point, and that controlling cash payments tends to be an issue, due to leakage. A number of respondents said they currently do not accept cash on delivery but are launching it as they realize the importance / size of the channel and the opportunities missed. Some of the surveyed e-commerce players also stated that sending a POS machine to the delivery point gives consumers the opportunity to pay via debit or credit card, considering that many consumers are concerned with online payment security.

RETURNS

None of the e-commerce players highlighted returns as an issue, with most stating that return rates are very minimal. However, respondents did report that the return rate starts to increase significantly after 5-7 days; the highest reason for returns being damage. All those surveyed have clearly and consistently applied return policies that are similar for both offline and online, in the case where they do have an offline presence.

DELIVERY & SHIPMENT

In terms of delivery and shipment, survey respondents are split. The e-commerce players who have in-house shipping and delivery stated that it is no key concern to them, as they are able to ensure high quality of delivery, with the advantage of getting immediate feedback. On the other hand, e-commerce companies who deal with external couriers reported facing several issues, ranging from incorrect addresses, to the absence of a recipient at the delivery address. This is especially challenging when dealing with couriers, since they only try making contact once, and move on when the customer is unresponsive.

Survey respondents highlighted that consumers, especially millennials, value having more control over when their deliveries are made; presenting them with a delivery time slot is hence a key recommendation. It is also essential to keep in constant communication with buyers regarding shipment status and inform them of any delays, which can be done via live order status and map monitoring. A number of respondents highlighted that a majority of the calls to their customer service centers were inquiries about the status of their order / shipment. With regards to shipping products across borders, most respondents reported that customs could be a lengthy process across markets, creating a challenge.

OPPORTUNITIES AND CHALLENGES

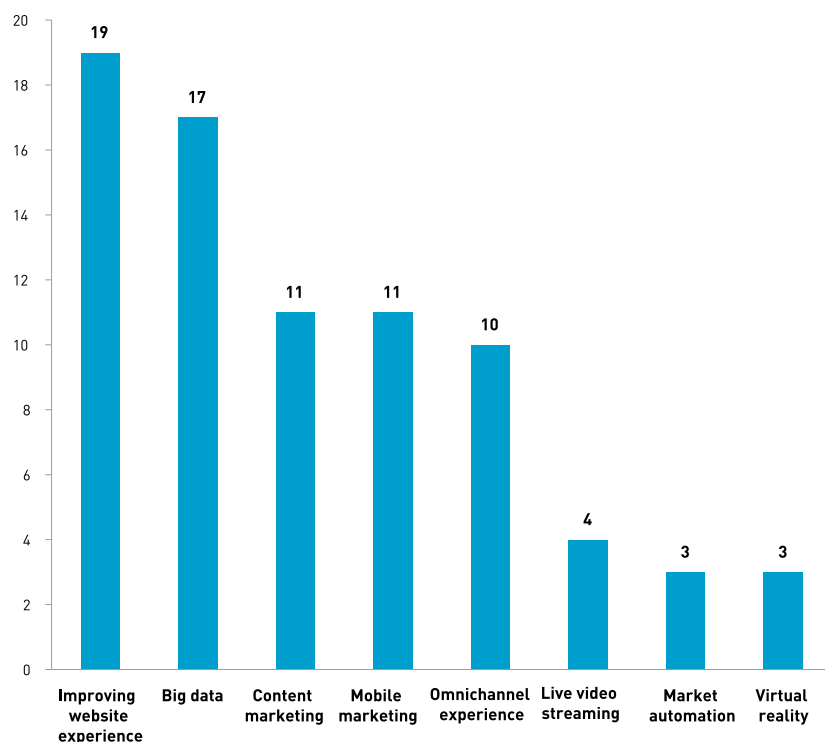
FIGURE 20: TOP CHALLENGES IN E-COMMERCE MARKETING



The top challenge cited by e-commerce players surveyed is consumer education. Survey respondents stated that they are focused on resolving this challenge by investing in customer service, PR and marketing – of which video and blog content marketing (consistent with the findings in Figure 7). The second key challenge regards issues that are related to shipping/delivery / logistics. This is especially true for the e-commerce players who do not have their own in-house delivery setup. They are focused on resolving this challenge by developing strong partnerships with logistics and payment companies and by supporting cash on delivery.

FIGURE 21: TOP OPPORTUNITIES IN E-COMMERCE MARKETING

The final section of the survey asked e-commerce players about the top digital trends they anticipate will affect their business. The top trend across respondents is the focus on customer experience by improving website experience, followed by leveraging big data. The next most important highlighted trends were content marketing and mobile marketing – consistent with the reports that the vast majority of sales is on mobile channels. Video related trends such as video ads, virtual reality, and live video streaming scored very low with respect to expected digital trends, which is in line with the previous conclusion that surveyed e-commerce players are not prioritizing YouTube and other video platforms.



CONCLUSIONS

SOCIAL MEDIA: MARKETING & ADVERTISING

- Facebook, Twitter, and Instagram are the key social media channels used organically by almost all e-commerce players.
- Marketing activities are mostly distributed on Facebook, followed by Instagram.
- Facebook is the most commonly used channel for paid advertisements.
- Facebook is the highest driver of conversions for almost all retailers surveyed.
- Instagram is one of the most used channels, both organically and paid, especially for conversion, however it is the lowest in terms of conversion.
- Social media is being used for a number of different objectives:
 - Promotional - key channels used are Facebook, Instagram, and Twitter
 - Customer acquisition - key channels used are Facebook, Instagram, and Twitter
 - Branding - Instagram; key channels used are Blogs and Instagram
 - Customer engagement - key channel used is Facebook
 - Education - key channels used are Blogs and Twitter

MOBILE

- Mobile strategy for most retailers is app-centric.
- Over 60% of respondents have a mobile app and 30% are building one.
- App user experience is critical and key design priorities are ease of use, fast, and full-screen visuals.
- Mobile is also one of the fastest growing sales channels for many retailers; over 60% of respondents claimed that more than 2/3 of their online sales are on mobile channels.
- Approximately 70% of respondents do mobile ads.

PURCHASING & LOGISTICS

- The majority of e-commerce players create targeted ads for each stage of the purchase cycle based on consumer navigation.
- Age does not play a role among consumers in converting when engaging ads; with the caveat that millennials are more open to considering / making online purchases.
- Most users purchase during their first 2 visits to the site, which is roughly within the first 3 days to 1 week of their visit.
- To increase the average order value, the majority of e-commerce players focus on pushing additional products by promoting related products or through bundling.
- Repurchase rates are high, and for quickly consumable goods and services, they repurchase within 2 weeks.
- Almost all e-commerce players have loyalty initiatives.
- The majority use email as the primary channel and Social Media as secondary channel to communicate initiatives and CRM.
- Loyalty schemes provide incentives using the following methods:
 - Based on the amount of purchase
 - Exclusive deals for subscribers
 - Free credits
 - Referral schemes
- The majority of GCC consumers prefer cash as the method of payment.
- COD is a challenge since customers change their minds at point of delivery.
- Consumers would like to gain more control over when deliveries are made, specifically millennials.
- E-commerce players who deal with couriers find it challenging to ensure high quality of delivery.

- Constant communication with buyers is required regarding shipment status and informing them of any delays; live order status can be monitored on the map.
- Shipping products across markets could be a lengthy process due to customs.

OPPORTUNITIES & CHALLENGES

- The number one expected digital marketing trend is focused on customer experience via improving website experience.
- The second ranked expected digital marketing trend is big data.
- The third is mobile marketing which is consistent with the reports that the vast majority of sales are on mobile channels.
- Majority of retailers listed consumer education as their main challenge in e-commerce marketing.
- The second biggest challenge e-commerce players face is related to shipping / delivery / logistics.

APPENDIX

SURVEY QUESTIONS

PRE-QUALIFICATION

1. **What is the gender split of your subscriber base? (Please give an estimate)**
 - ☐ Male
 - ☐ Female

2. **What is the age group split of your subscriber base? (Please give an estimate)**
 - ☐ 20 – 25
 - ☐ 26 – 35
 - ☐ 36 – 45
 - ☐ 46 – 55
 - ☐ 56 – 65
 - ☐ 65+

MARKETING CHANNELS

3. **What is your social media strategy in particular for millennials?**

4. **How are your marketing activities distributed within the range of platforms below?**
 - ☐ Facebook
 - ☐ Instagram
 - ☐ Snapchat
 - ☐ YouTube
 - ☐ Other _____

5. **How are your advertising investments distributed within the range of platforms below?**
 - ☐ Facebook
 - ☐ Instagram
 - ☐ Snapchat
 - ☐ YouTube
 - ☐ Other _____

6. **What are your objectives on each social media channels and how do you use them differently?**
- ☐ Facebook
 - ☐ Instagram
 - ☐ Snapchat
 - ☐ YouTube
 - ☐ Other_____
7. **How are you planning on distributing the incremental investment within the range of platforms below and why?**
- ☐ Facebook
 - ☐ Instagram
 - ☐ Snapchat
 - ☐ YouTube
 - ☐ Other_____
- Why? _____
8. **What is your percentage split of conversion by channel?**
- ☐ Facebook
 - ☐ Instagram
 - ☐ Snapchat
 - ☐ YouTube
 - ☐ Other_____
9. **What is your mobile strategy in particular for millennials?**
10. **Do you do mobile ads? If so, what percentage of your digital budget is on mobile ads?**
11. **Do you have an app and what do you use your app for?**
12. **What percentage of online sales are driven through mobile?**
13. **What is your content marketing strategy?**
14. **Do you have a blog? What kind of content do you post?**

CONSUMER BEHAVIOR

15. **What fundamental behavioral differences do you see in the e-commerce space across GCC markets?**
16. **What does your purchase cycle look like, and how does it differ across markets (Single session, repeat visits, 2 weeks etc.)?**
17. **Do you create targeted ads / content for each stage of the purchase cycle?**

18. **What is your average order value, and how does this compare in younger vs. older customers?**
- 19.
20. **What percentage of customers are repeat buyers? How does this compare in younger vs. older customers?**
21. **Are younger customers more likely to convert when engaging with ads as compared to older customers?**
22. **What kinds of loyalty initiatives do you currently run? What channels do you use for CRM / loyalty?**
- ☐ Email campaigns
 - ☐ Social media
 - ☐ Personal outreach
 - ☐ Other_____

CHALLENGES & OPPORTUNITIES

23. **Rank the top 3 digital media trends in the coming few years**
- ☐ Big data
 - ☐ Content marketing
 - ☐ Marketing automation
 - ☐ Omnichannel experience
 - ☐ Mobile marketing
 - ☐ Improving website experience
 - ☐ Video ads
 - ☐ Virtual Reality
 - ☐ Live video streaming
 - ☐ Content remarketing
 - ☐ Other_____
24. **Rank the top 3 challenges you have faced with marketing e-commerce**
- ☐ Competitive pricing
 - ☐ Shipping related / delivery / logistics
 - ☐ Payment methods
 - ☐ Supply chains / product sourcing
 - ☐ Consumer education
25. **How have you dealt with the issue?**
26. **Do you have an offline presence? If so, how do you integrate / synergize across channels? What are the key best practices for a multichannel approach?**
27. **Have you sold FMCG products on your site at any point in time? If so, how is it different from other types of products? What are the challenges and key lessons learned for effective marketing / e-commerce for FMCG products?**

LOGISTICS & PAYMENT

28. **What are your top 2-3 logistics / supply chain / fulfillment challenges?**
29. **Is there a maximum shipping time, after which you find that return rates increase significantly? How does this differ between younger and older customers?**
30. **What is your return policy, and how has this evolved over time? What are some best practices for reducing returns?**
31. **What percentage of orders are using online payment vs. cash on delivery? What are the preferred methods of payment for millennials? How does this vary across markets?**
32. **How do you increase the average order value, especially for low-value SKUs? (Rank the list below from 1 to 5)**
 - ☐ Free shipping thresholds
 - ☐ Minimum order
 - ☐ Promote related products
 - ☐ Product bundling
 - ☐ Discounts on minimum purchase



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