

**GSMA Mobile 360 - Latin America****AGENDA****Wednesday 13<sup>th</sup> May 2015****9:00 Harnessing the Mobile Ecosystem to Deliver Greater Digital Inclusion in Latin America**

Mobile networks are playing an important role in bridging the digital divide and bringing internet access to previously unconnected populations across Latin America. Mobile operators and players from across the broader ecosystem are making an important contribution to boosting digital inclusion. For example, innovative new tariff plans and lower-priced smartphones are increasing the affordability of mobile services across the region. Governments have recognised the importance of widening access to the internet and broadband connectivity and have an important role to play in providing a regulatory environment that will support and encourage network infrastructure expansion and investment. This session will highlight some of the most exciting digital inclusion initiatives that are underway in Latin America today, featuring a powerful range of perspectives from across the mobile ecosystem.

**Moderator: Sebastian Cabello, Director Latin America, GSMA****9.00 – 9.15 Tom Phillips, Chief Regulatory Officer, GSMA****9.15 – 9.30 Ricardo Berzoini, Communications Minister of Brazil****9.30 – 9.45 Rodrigo Abreu, President/CEO, TIM Brasil****9.45 – 10.00 Juan Antonio Abellan, Executive Director, Telefonica Hispanoamerica North****10.00 – 10.30 Panel Discussion**

- **Fabio Coelho, President Google Brazil & Vice President, Google Inc.**
- **Jose Perdomo, CEO, Tigo Paraguay**
- **Juan Pablo Calvo, CEO, Nuevatel Bolivia**

**10.30 Networking Break****11:15 Delivering Upon the Promise of Digital Identity**

In common with the rest of the world, industries across Latin America are increasingly becoming more digital and more mobile, from entertainment to banking, to health and e-government. Yet, the demand from consumers for secure access to services, greater privacy and robust data protection has never been more acute. As the number of services we access online has grown and the level of risk we expose ourselves to has increased, there is a critical need for more sophisticated, secure and convenient ways of creating, managing and applying digital identities. Mobile represents one of the most powerful and flexible platforms for the transformation of digital identity. Ubiquitous, intelligent,

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and protected by the SIM card which is constantly authenticating, mobile already comprises all of the ingredients required to take the notion of identity into its next generation, from strong registration processes through to a secure element in the SIM in which keys, certificates and cyphers can be stored. This session will explore the ways in which mobile operators can benefit from positioning themselves at the front line of digital identity services, showcasing some of the initial success stories in Latin America.

**Moderator: Javier Albares, Head of Corporate Strategy, GSMA**

**11.15 – 11.30**

**11.30 – 11.45 Tomi Soininen, Managing Director, Valimo MobileID, Gemalto**

**11.45 – 12.00 Leandro Bennaton, Chief Security Officer, Terra (Telefonica Group)**

### **12.00 Accelerating the Development of Mobile Financial Services in Latin America**

It is estimated that 60% of adults in Latin America are currently unbanked, ranging from 86% in Nicaragua and El Salvador, to 44% in Brazil. Mobile can provide the infrastructure needed to offer vital financial services such as payments, transfers, insurance, savings and credit, with digital identity enabled via the mobile handset offering the promise of greater security. However, although there are a growing number of mobile money deployments in Latin America today, the rate of adoption has tended to lag that seen in other emerging markets such as Africa and parts of Asia. Extending the digital financial ecosystem and growing revenues are among the most pertinent of concerns for operators. Furthermore, low customer activity also remains a challenge in most mobile money markets globally, with only 29.9% of registered accounts active in June 2013. This session will highlight the status of mobile money in the Latin America, demonstrating the real social impact that such services are having upon unbanked populations in this region.

**Moderator: Pablo Garcia Arabehty, Consultant on Digital Finance for Latin America, CGAP**

**12.00 – 12.15 Diego Gutierrez, Head of MFS LatAm, Millicom**

**12.15 – 12.30 Marcos Etchegoyen, CEO, MFS**

**12.30 – 13.00 Panel Discussion**

- **Diego Gutierrez, Head of MFS LatAm, Millicom**
- **Diego Castanada, Regional Manager for Latin America, BIMA**
- **Marcos Etchegoyen, CEO, Zuum**
- **Manuel Velarde, Manager of Operations and Innovation, Project of Electronic Money, ASBANC Peru**

**13.00 Lunch Break**

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## 14.15 Sustainable Business Models for 4G Leadership and Delivering Returns on CAPEX Investment

Whilst Latin America is entering into a maturing phase with slowing revenue and unique subscriber growth rates (reflecting a trend of decelerating subscriber growth in major markets), the region is now seeing an accelerating migration to higher speed networks and smartphone adoption. At the end of August 2014, LTE services had been launched by 44 networks in 18 countries throughout the region and is expected to grow at an average rate of 85% per annum in the 7 years to 2020. However, profitability for many operators in Latin America is under pressure as a result of competitive and regulatory factors, with margins in aggregate now the lowest of any developing region. This makes it more challenging for operators to fund investments at a time when there is ongoing pressure by customers and regulators to improve networks to alleviate capacity constraints (while addressing quality of service issues) as well as the competitive challenge of launching ever higher-speed networks. Despite these challenges, operator CAPEX in the region has totalled more than US\$96 billion over the last six years (2008 to 2013) and 7.9 billion in 2012-2015 in spectrum licenses (GSMA). This session will explore the business models that hold the key to sustainability for operators in the region in expanding coverage and delivering returns on CAPEX investments.

**Moderator: Ari Lopes, Principal Analyst Latin America, Ovum**

**14.15 – 14.30 Martin Wessel, Head of Technology Evolution, Telecom Argentina**

**14.30 – 14.45 Bernardo Kos Winik, Retail Director, Oi**

**14.45 – 15.00 Jesper Rhode, VP Marketing, Ericsson**

**15.00 – 15.30 Panel Discussion**

- **Paul Byrne, Head of 4G Products, Digicel Jamaica**
- **Jesper Rhode, VP Marketing, Ericsson**
- **Bernardo Kos Winik, Retail Director, Oi**
- **Martin Wessel, Head of Technology Evolution, Telecom Argentina**

**15.30 Networking Break**

## 16.15 Opportunities for M2M and Connected Living

The Machine to Machine (M2M) sector is an increasingly important source of connections growth for mobile operators worldwide. There were 16 million cellular M2M connections in Latin America at the end of September 2014, a figure that is expected to grow by 25 per cent a year (CAGR) in the period to 2020 (GSMA). As at the second quarter of 2014, Brazil was the fourth-largest M2M market worldwide, with 9.1 million connections, representing around two thirds of the Latin American total. The majority of deployments to date have been in the areas of telematics/fleet management and smart cities, with SIM cards designed for these verticals expected to represent 49% of M2M SIMs in Latin America in 2018 (Pyramid Research). The automotive industry in particular has seen how

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supportive regulatory frameworks can play an important role in stimulating the deployment and adoption of new M2M applications and services. For example, recent policy from the Brazilian government has mandated the installation of vehicle tracking devices in all locally manufactured and imported cars from 2016. Yet this is just one application, and the potential for M2M to deliver improved services and efficiencies extends across all industry verticals. This session will address the challenges and opportunities for M2M in Latin America, highlighting some of the most notable deployments and outcomes for the region.

**Moderator: Luis Minoru, Director, Consulting Services & IT (CIO), PromonLogialis**

**16.15 – 16.25 Rafael Steinhauser, SVP & President, Latin America, Qualcomm**

**16.25 – 16.40 Daniel Fuchs, CIO, Vodafone Brazil**

**16.40 – 16.50 Fabiano Del Soldato, Sales Centre Vice President, South America, AT&T**

**16.50 – 17.00 Eduardo Takeshi, Head of M2M, Telefonica Vivo**

**17.00 – 17.30 Panel Discussion**

- **Daniel Fuchs, CIO, Vodafone Brazil**
- **Fabiano Del Soldato, Sales Centre Vice President, South America, AT&T**
- **Eduardo Takeshi, Head of M2M, Telefonica Vivo**

**17:30 Drinks Reception**

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