MOBILE ECONOMY NORTH AMERICA

Unique subscribers and SIM connections

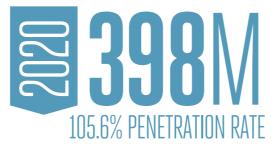












Leading the world in the move to 4G and smartphone adoption



60%

Smartphones accounted for over 60% of connections in North America at end of 2013



Rapid migration to higher speed networks with 4G close to a third of connections by mid-2014

Data traffic growth and high usage levels fuelled strong revenue growth



High levels of mobile usage compared to other regions

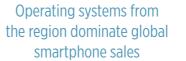


Operator revenues grew at CAGR of 4.7% 2008-13

Revenues forecast to grow at a CAGR of over 2% 2013-20

At the centre of a new and rapidly evolving mobile ecsoystem







Leading market for digital commerce.

Mobile commerce purchases
on smartphones and tablets totalled

US\$144B in 2013



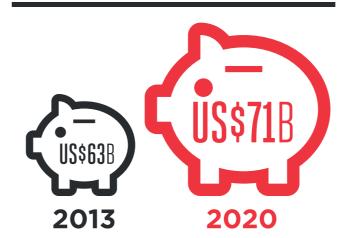
US is second largest market for M2M connections and is seeing a range of new deployments with significant growth potential

Mobile ecosystem contribution to GDP in North America

2013 US\$550B 9 0 / 0 / 0 GDP IN 2013

US\$623B

Public funding



Mobile ecosystem contribution to public funding In North America

Employment



1.5 million jobs supported directly and indirectly by the mobile ecosystem in 2013