



# THE NEW MOBILE *HORIZON*

Mobile World Congress 2013 Preview

23 January 2013

## Introductions

John Hoffman

Chief Executive Officer: GSMA Ltd

Ben Wood

Director of Research: CCS Insight

@benwood

Michael O'Hara

Chief Marketing Officer: GSMA

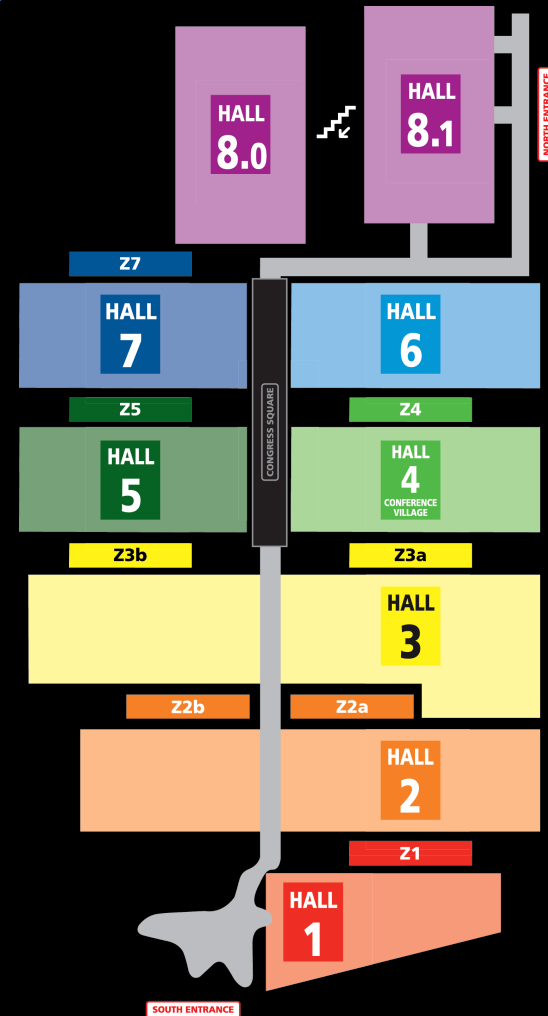
@jmohara

# Record-Setting Mobile World Congress

- World's leading mobile industry event
  - 70,000+ attendees from 200 countries
  - More than 50% of attendees are C-level executives
- Largest exhibition and business networking venues
  - 1,500 companies showcasing cutting-edge solutions
  - 113 Spanish companies exhibiting, 60 of which are Catalan
  - Record space utilisation – 94,000 square metres (net) of exhibition and hospitality
- Unparalleled conference programme and speakers
  - 270 speakers in 40 sessions, including leading CEOs
- Ministerial delegations from more than 140 countries and international organisations

# Welcome to Our New Venue

- Exhibition, hospitality and conference spread across 8 halls
- Conference Village offers 21% more auditorium seating
- New Media Village with 30% more working stations
- 49 food outlets across venue
- 8 themed outdoor networking areas
- 270 additional WiFi hotspots
- Larger taxi ranks for shorter wait
- “Green” facility – natural lighting reduces electricity use by 30%, 18,000 solar panels in use



Carrer del Foc

Carrer de la Botànica

Av. Joan Carles I



# Conference Village



# Networking and Green Spaces





# Showcasing Cutting-Edge Mobile Solutions



# Thought Leadership Conference

- Visionary keynotes with the industry's leading CEOs
- Keynote topics:
  - Mobile Operator Strategies
  - Vertical Disruption
  - Connecting the Next Billion
  - Future of Communications
  - Operating in the Cloud
  - Mobile in Media
  - Mobile as a Platform for Innovation
- Focused sessions on applications, big data, business strategy, connected living, developing markets, devices, mobile advertising, mobile cloud, mobile money, next-generation technologies, NFC, OSS/BSS, small cells and social media



# Industry-Leading Conference Programme



**Randall Stephenson**  
Chairman, President and CEO  
AT&T



**Suk-Chae Lee**  
Chairman and CEO  
KT Corp.



**César Alierta**  
Executive Chairman and CEO  
Telefónica



**Vittorio Colao**  
Chief Executive  
Vodafone Group



**Hans Vestberg**  
President and CEO  
Ericsson



**Stephen Elop**  
President and CEO  
Nokia



**Gary Kovacs**  
CEO  
Mozilla



**Drew Houston**  
Founder and CEO  
Dropbox



**Susan Whiting**  
Vice Chair  
Nielsen

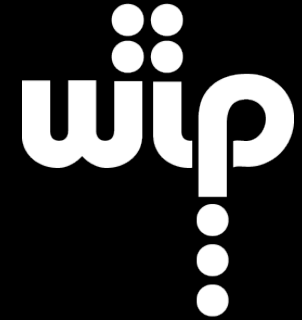


**Stephen Girsky**  
Vice Chairman  
General Motors





App Planet



OneAPI



CARCONNECTIVITY  
consortium

## mPowered Brands

- Designed to accelerate use of mobile as a marketing medium
- Includes mPowered Brands Zone, mPowered Brands Theatres, mPowered Brands Mobile Ambassador programmes
- Participating companies include InternetQ, McCann Worldgroup, Millennial Media, Mobile-LoCo, Nielsen, Rubicon and Velti



**mPOWERED**  
BRANDS



# Forum Series at Mobile World Congress

**LTE**  
FORUM

**MOBILE**  
SECURITY  
FORUM

**MNO**  
DEVELOPER  
CLOUD  
FORUM

**ZTE中兴**



**Metaswitch**  
 Networks



**ZTE中兴**

**JUNIPER**  
NETWORKS®

## GTI LTE TDD/FDD International Summit

- Seventh GTI International Summit
- Promotes the convergence of LTE TDD and FDD and accelerating TD-LTE deployment in global markets
- Highlights TD-LTE operator strategies and deployments
- Keynote speeches from leaders of China Mobile, Bharti Airtel, Clearwire, Ericsson, HSBC, Nokia Siemens Networks, Qualcomm, Samsung and Softbank Mobile





# GLOBAL MOBILE AWARDS 2013



- Honour excellence and innovation in mobile
- 37 awards in 8 categories
- New awards reflect trends in connected devices and mobile apps
- Shortlist to be announced end of January
- Winners to be presented at Awards Ceremony on Tuesday, 26 February



# Connected Living

## Consumer Electronics



## Automotive



## Healthcare



## Education



## Utilities





# Connected City



THE NEW MOBILE  
**HORIZON**





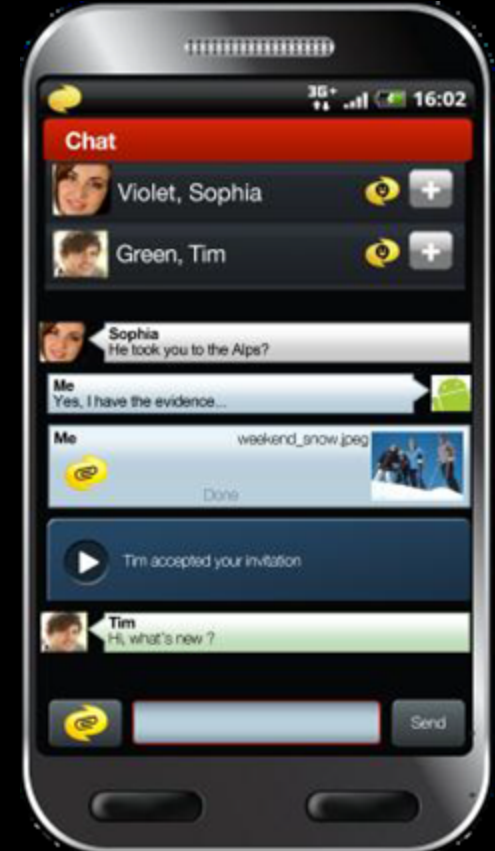
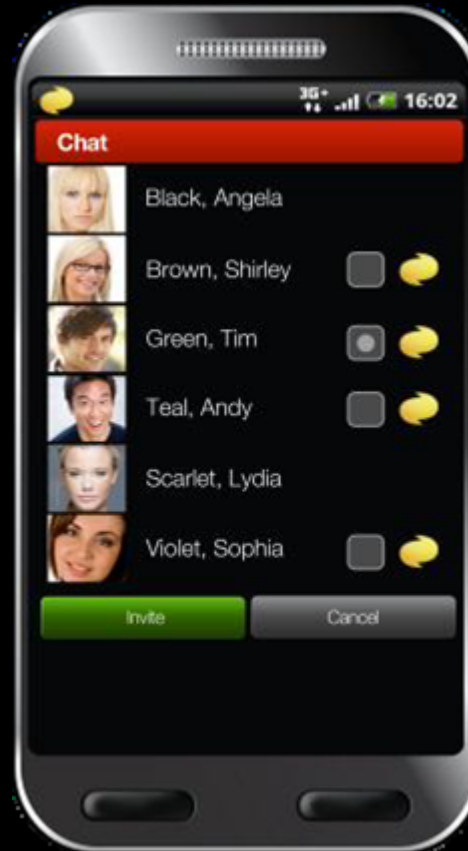
# Mobile Spectrum



To create jobs and diversify their economies, governments across the globe should prioritise the release of **harmonised spectrum** for LTE services



# Rich Communications



# Mobile NFC



Ticketing



Payments



Secure Access



Coupons







# NFC

experience

- **NFC Centre** – Dedicated area with handset and service demos, NFC partners and Experience support
- **NFC Interactive Zones** – More than a dozen zones throughout Fira Gran Via providing exhibitor directories, venue information and more
- **Barcelona NFC Locations** – NFC touch points at airport, select hotels and restaurants and in some taxis and shops
- **Virtual NFC Badge** – NFC badge streamlines entry to the event – no need to repeatedly provide physical photo

CCS

insight

# MWC 2013

## Bigger, Faster, Better

Ben Wood, Chief of Research  
[ben.wood@ccsinsight.com](mailto:ben.wood@ccsinsight.com) / twitter: @benwood

# CCS Insight - Company Overview



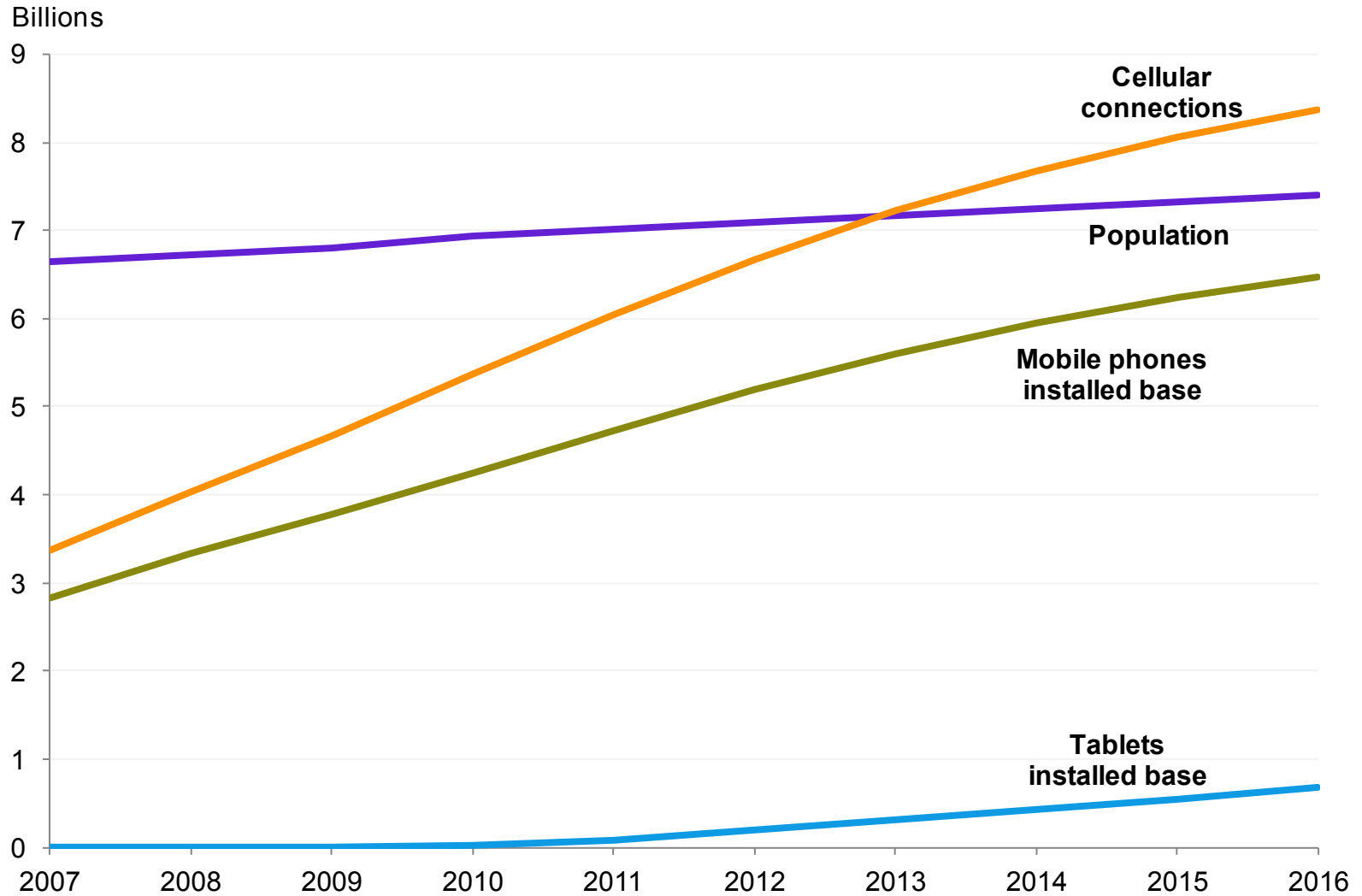
- **Established in 1993**
- **Blue-chip client base including:**
  - Over 85 percent of world's mobile device makers by volume
  - Leading mobile network operator groups
  - Content, web and service providers
  - Financial community, media and others
- **EMEA operations headquartered in Slough, UK / US HQ in Boston**
- **Consulting Division**
- **Team of 12 Full Time Analysts + 10 Associates**



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# Market Overview

# The World is Hungry for Mobile Devices

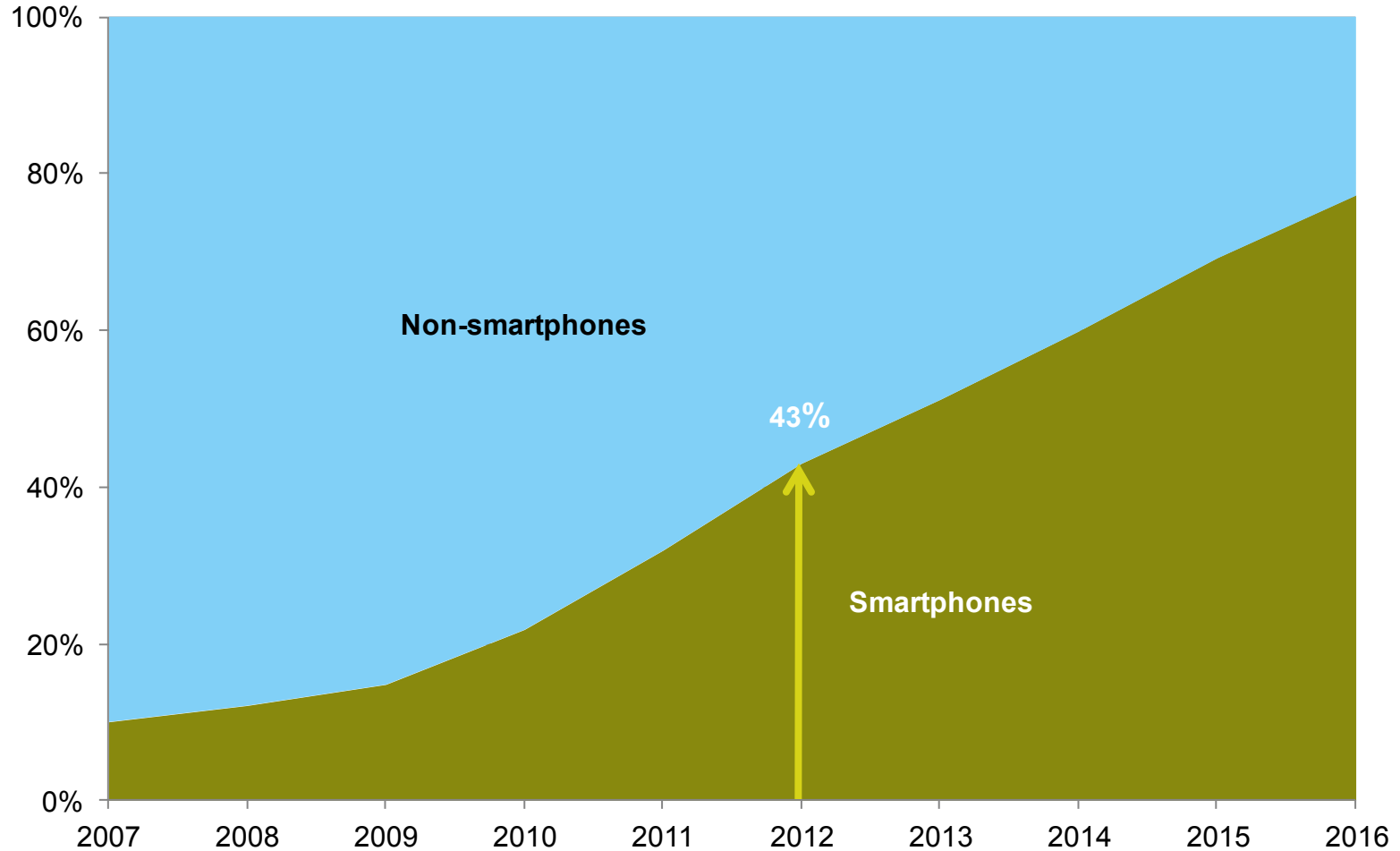


Source: CCS Insight; Wireless Intelligence



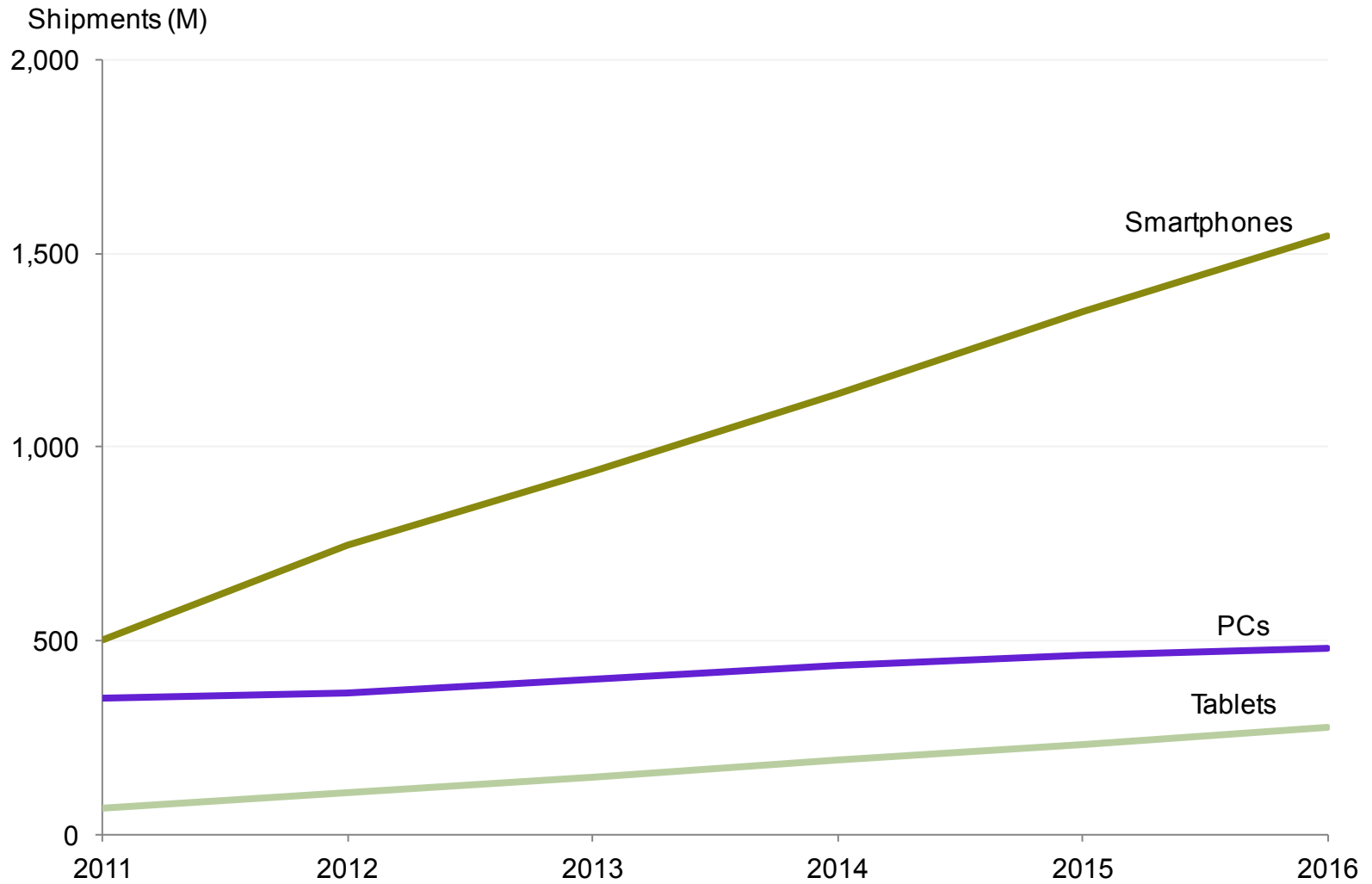
# Rapid Shift to Smartphones Is Energizing the Market

Mobile phone shipments by type, worldwide



Source: CCS Insight

# The Future is Mobile and Connected



Source: CCS Insight

# It Is No Longer Just About The Devices

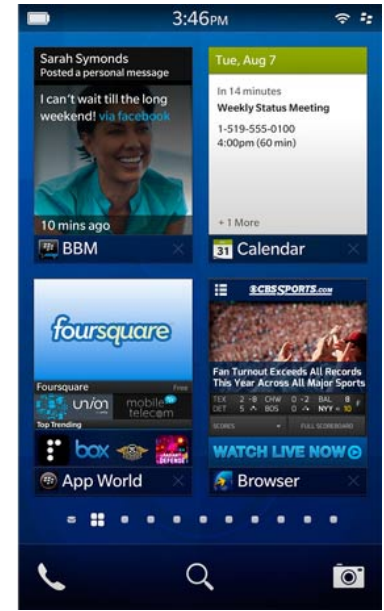


# A Dominant Design Has Emerged So The Market Has Changed





# Software and Experiences Are The New Battleground



ios



Windows Phone

BlackBerry 10

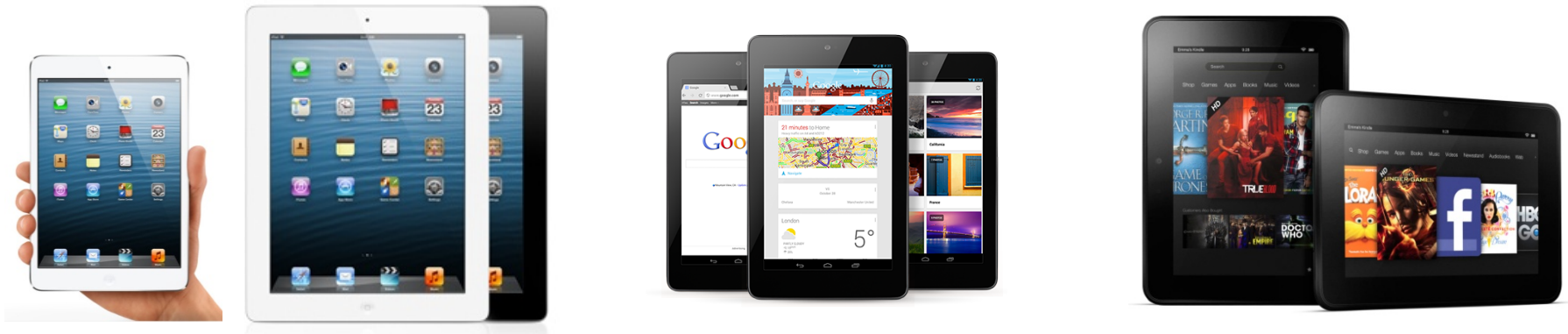
TIZEN



ubuntu

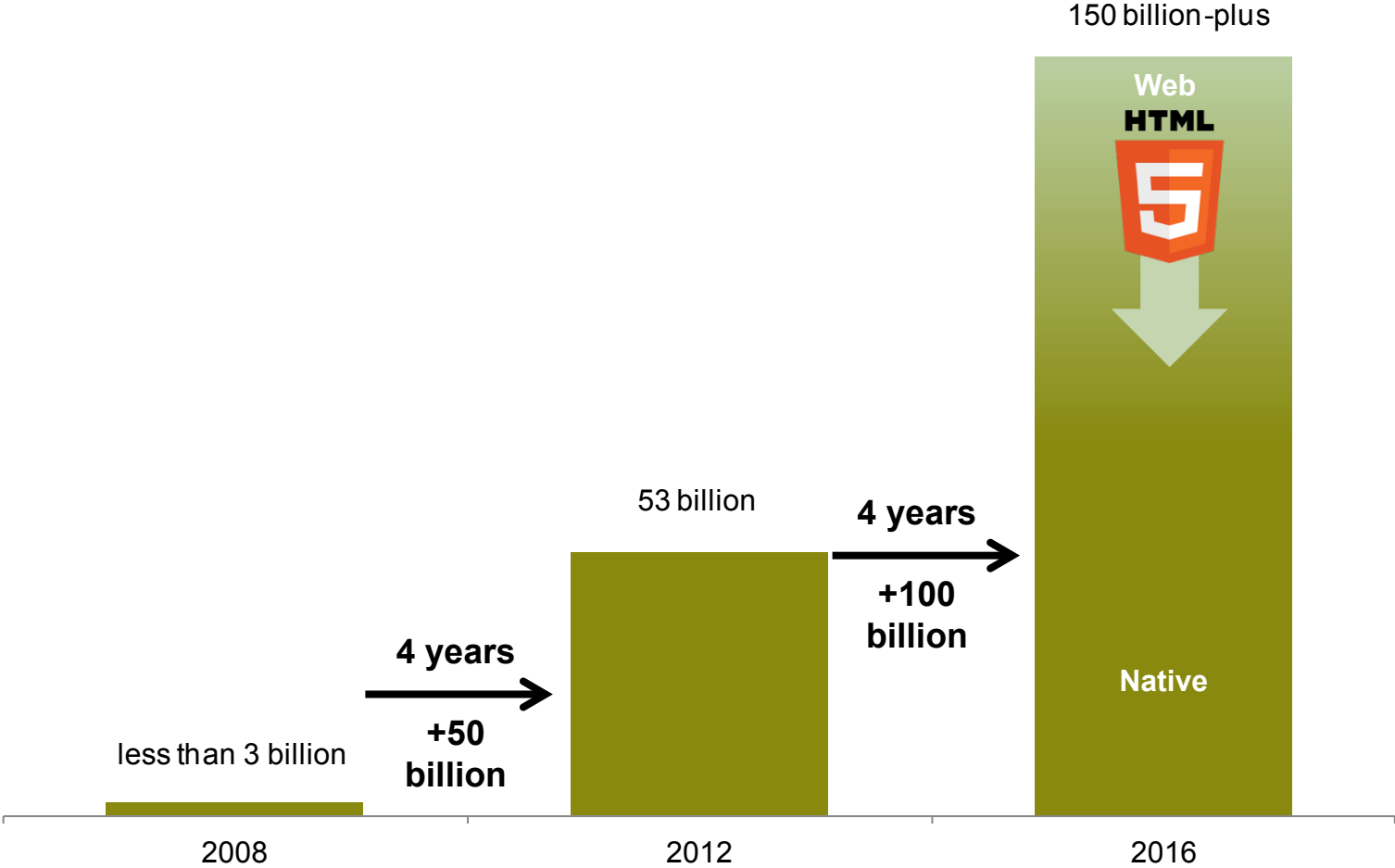
# Tablet Growth Now Unstoppable

- A category with true mass-market potential
- Additive to people's connected devices
- More likely to be perceived as "computer-like" not "smartphone-like"
- Content consumption is a key use case
- Wide-area usage now a valid scenario



# All About Apps

Application downloads, worldwide



Includes new downloads and updates

# Disruptive New Forces

amazon.com®

Google

Microsoft

kindle fire



Surface



nexus<sup>4</sup>





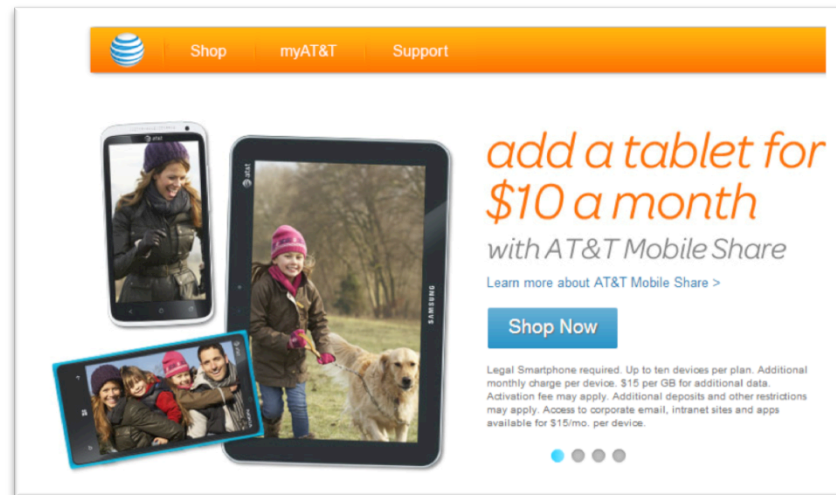
# The Role for Network Operators In This New World

- **Technology and Tariffs**

- Shift from voice to visual usage = ascendancy of mobile data / Internet connectivity
- New technology (esp. LTE) presents opportunities to monetise new consumer behaviours
- New tariffs needed for the multi-device world

- **Service and Support**

- Consumers have never needed more help given the complexity of the landscape



Shop myAT&T Support

add a tablet for  
**\$10 a month**  
with AT&T Mobile Share

[Learn more about AT&T Mobile Share >](#)

[Shop Now](#)

Legal Smartphone required. Up to ten devices per plan. Additional monthly charge per device. \$15 per GB for additional data. Activation fee may apply. Additional deposits and other restrictions may apply. Access to corporate email, intranet sites and apps available for \$15/mo. per device.

- **Everything Android**
  - Android being used across many product categories (e.g. cameras, watches, ovens etc.)
  - Android is now a key platform to support in addition to Apple iOS
  
- **Smartphones & Tablets as an ingredient in the multi-screen mix**
  - Assumed in context of CES that smartphones & tablets play role across all elements
  
- **The Internet Of Things is becoming a Reality At Last**
  - Numerous consumer electronics devices that incorporate a SIM or other connectivity (Bluetooth, Wi-Fi, Zigbee, Z-Wave etc.)
  - Examples include: Connected home, personal health / fitness gadgets, connected cameras, tags / trackers, domestic appliances, eReaders and automotive applications
  
- **LTE and TD-LTE will be big technology talking points**
  - Move to faster mobile networks accelerating
  - Lots of discussion of progress in Japan, Korea and USA
  - Service evolution vital (VoLTE, RCS-e)

- **Smartphone Flagship Benchmark**
  - 5-inch screen, LTE, quad-core processor, 13 mega-pixel and waterproof
  - Lots of other mid- and low-tier smartphones too
  
- **New Operating Systems for Mobile Devices**
  - Firefox, Tizen, Ubuntu and the role of HTML5
  
- **The Chinese Play Big In Infrastructure and Devices**
  - Huawei, Lenovo, TCL (Alcatel One Touch), ZTE and others have huge presence
  
- **Emergence of App-cessories**
  - No longer just about accessories, many have an app associated with them

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# MWC 2013

## Bigger, Faster, Better

**Ben Wood, Chief of Research**

[ben.wood@ccsinsight.com](mailto:ben.wood@ccsinsight.com) / twitter: @benwood

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CCS Insight

EMEA:  
268 Bath Road  
Slough  
SL1 4DX  
UK  
Tel: +44 8450 574223

Twitter: @ccsinsight  
[info@ccsinsight.com](mailto:info@ccsinsight.com)

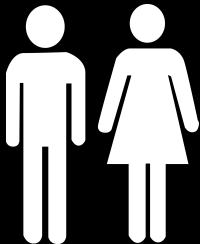
[www.ccsinsight.com](http://www.ccsinsight.com)

US:  
CCS Insight  
12731 Calle De La Siena  
San Diego  
CA 92130  
Tel: +1 858 794 0494

## Economic Impact - 2012



**€301,000,000**  
➔ TOTAL ECONOMIC IMPACT



**6,485**  
➔ PART-TIME JOBS

Economic impact and jobs grew 9.5% and 6% respectively from 2011

# The Must-Attend Mobile Industry Event

- Worldwide mobile industry converging in Barcelona
- Outstanding new home - Fira Gran Via
- Dynamic exhibition and business networking
- Industry-leading conference programme
- Exciting new experiences – Connected Living and NFC
- Award-winning App Planet developer programme
- Unprecedented gathering of ministerial delegations
- Record-setting event across all key metrics



THANK YOU!

@GSMA

#MWC13