

GSMA: Perspectives on Mobile

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29 January 2013



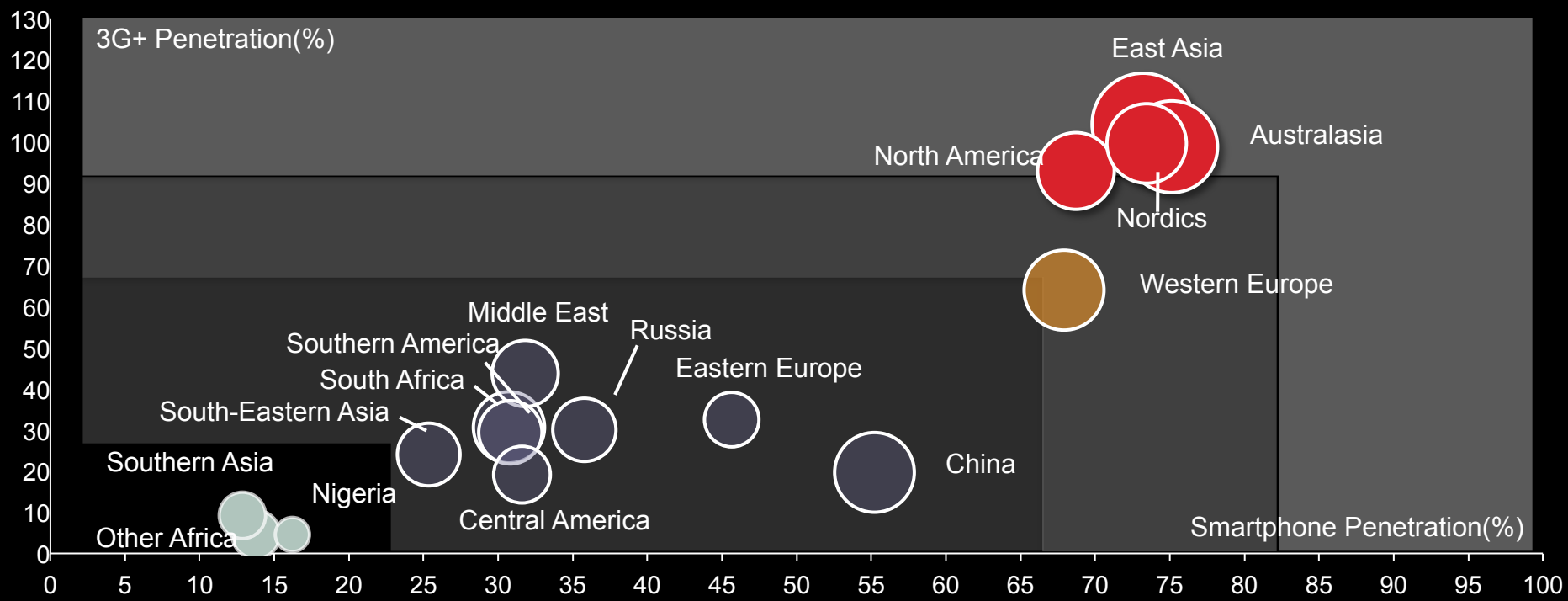
Mobile Market Segmentation



2012 view of global mobile markets maturity, and impact on revenue diversification

Importance of non-voice/messaging revenues (% total revenue)

>45% ↑
<20%



Discoverers
(Emerging markets)
34% 2012 Population

Fast Growers
(Developing markets)
49% 2012 Population

Connected Players
(Mature markets)
7% 2012 Population

Digital Pioneers
(Advanced markets)
11% 2012 Population

Population split is based on 65 sample countries, fixed at 2011 levels. 3G penetration: 2012 Q2 and beyond forecast based on 2012 Q1 actuals and historic figures: Wireless Intelligence
% non voice/messaging ARPUs – based on Ovum data 2011. 2010 are actuals, 2011 and beyond is forecast (includes all mobile broadband and VAS service revenues).
Smartphone penetration – based on Strategy Analytics data from 2011. 2010 are actuals, 2011 onwards are forecasted

GSMA Key Initiatives



Future Communications



Transactional Services



Connected Living



Mobile Identity

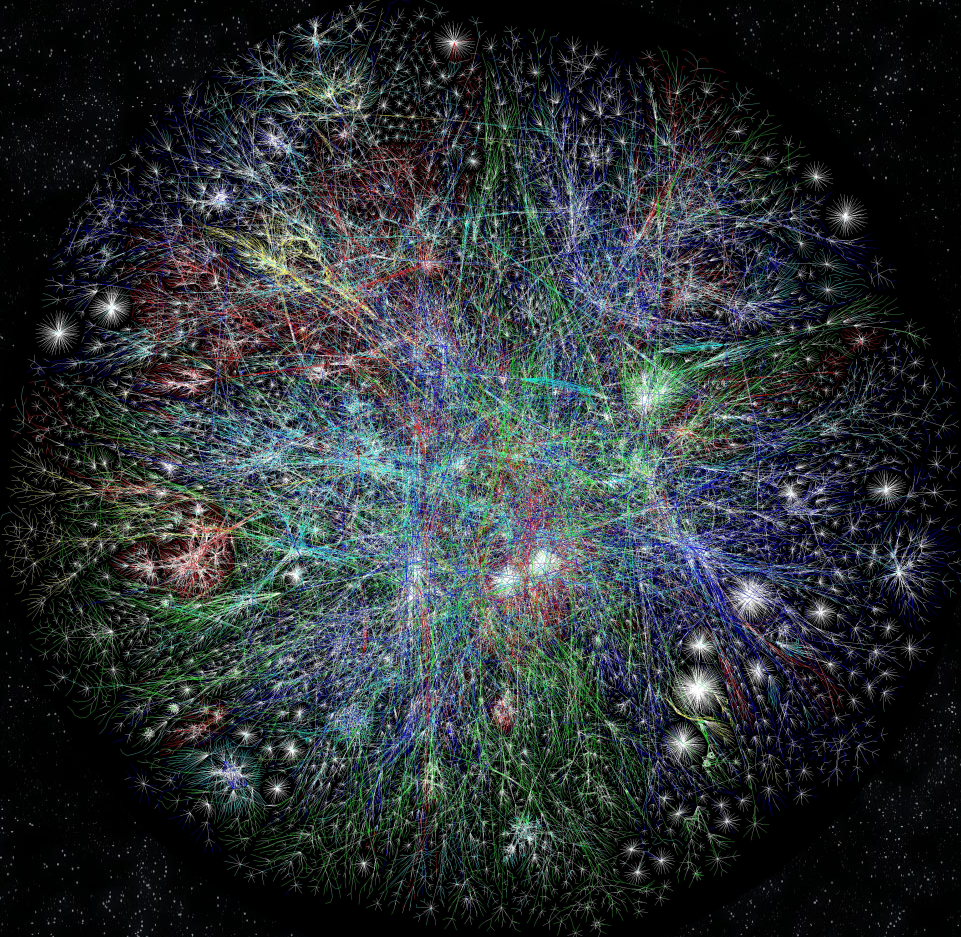
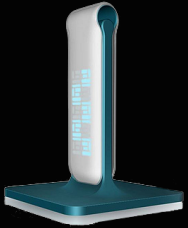


Spectrum



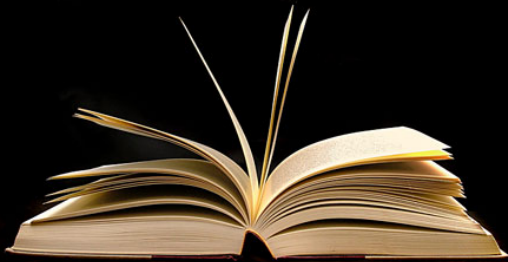
Network APIs

The Connected Life



25 Billion Connected Devices by 2020

The Digital Life

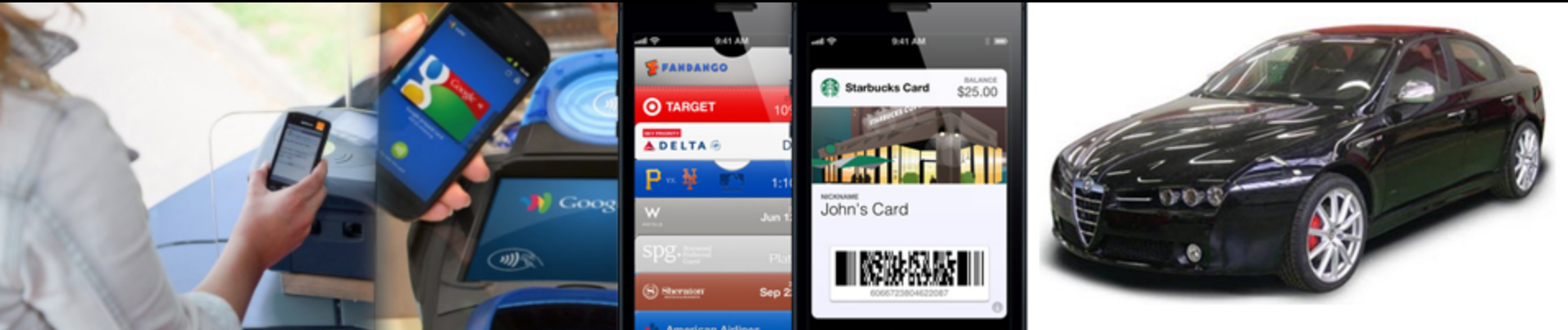


The Connected Life & Digital Life



...converges on your smartphone

NFC: The Critical Link



NFC is the link between the Digital Life & the Connected World:

Ticketing: Replacing paper tickets on public transport systems

Payments: Replacing cash and credit cards to purchase goods & services

Loyalty: Replacing store loyalty cards

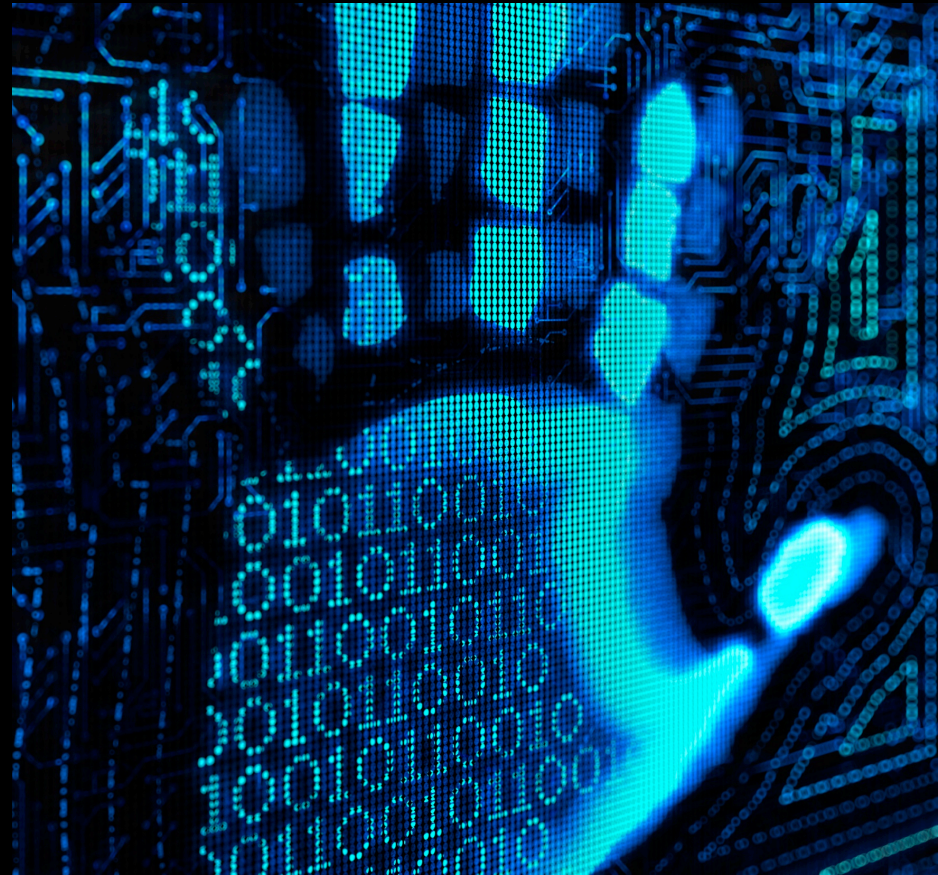
Coupons: Replacing money-off vouchers and coupons

Access Control: Replacing traditional keys

Identity: Replacing physical identity documents

Mobile Identity

- Management of digital identity a growing challenge as more and more users come online
- Mobile Identity allows users to verify and authenticate themselves remotely and securely via their mobile phone
- Enables secure access to personal data and financial services, facilitates eGovernment services and more
- Operators uniquely positioned for provision of secure, authenticated services backed by diligent fraud prevention measures



Connected & Digital Life Imperatives

- Global Reach
- Interoperability
- Security
- Privacy



Mobile operators deliver these attributes

SIM: Central to Mobile



- Much more than mechanism for authenticating devices to mobile networks
- SIM takes on greater importance as more services require higher levels of security and privacy
- GSMA has established SIM Steering Group to align industry and provide greater strategic focus on SIM across GSMA projects
- Includes operators, SIM vendors, handset makers
- Jerome Ajdenbaum is Vice Chair of SIM Steering Group

Thank You!

