

Keynote Panel

Mobile Challenges & Opportunities in an All-IP World

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THE INDUSTRY IS AT AN INFLECTION POINT. THE NEXT **SEVEN YEARS** WILL SEE ...



RAPID INDUSTRY GROWTH

1 INCREASE IN DEMAND IN LATAM  **18x DATA** 2012-2020

2 SIGNIFICANT INCREASE IN ECOSYSTEM VALUE GLOBALLY  **+\$1.1tn** 2012-2020

3 MOBILITY BECOMES TRULY CENTRAL TO OUR DIGITAL LIVES 

INCREASING CHALLENGES FOR OPERATORS' GROWTH

1 INCREASING COMPETITION FOR CUSTOMER ENGAGEMENT 

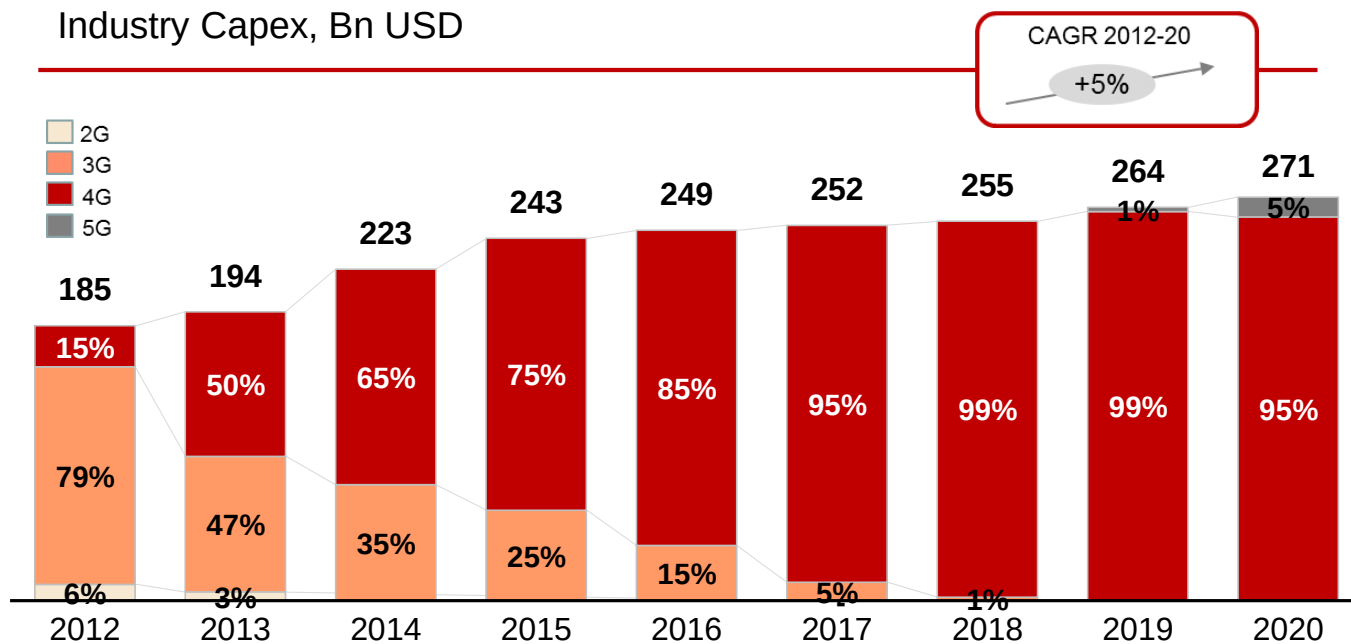
2 MAINTAINING SUSTAINABLE REVENUE GROWTH 

3 MANAGING INVESTMENT IN THE NETWORK 

OUR INDUSTRY WILL INVEST ~US\$1.7T IN 4G NETWORKS THROUGH 2020



Industry Capex will be focused on 4G in the 2020 horizon



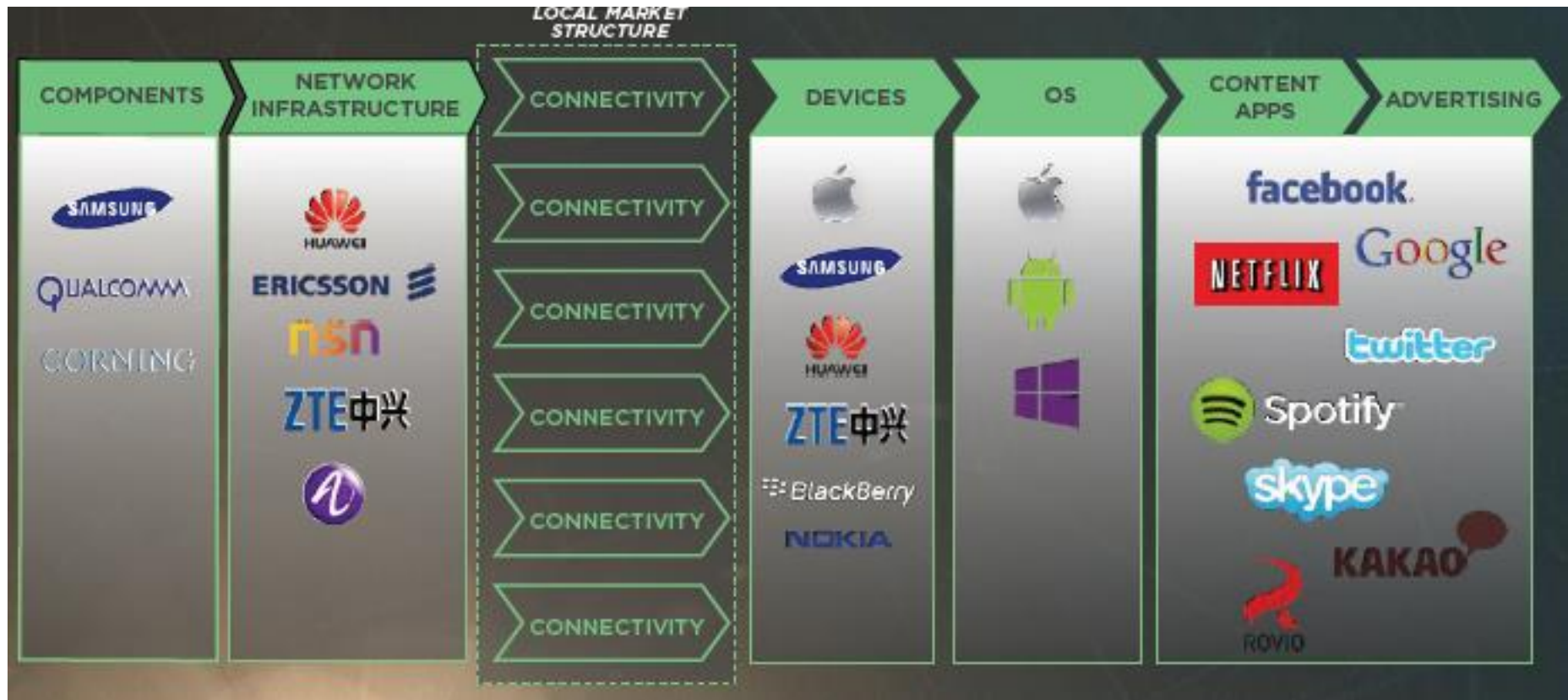
Source: PWC / IHS iSuppli Mobile and Wireless Communications Service / GSMAi

Providing Mobile Broadband to the next billion subs. does **not** require 5G

OPERATORS ACT LOCALLY IN A GLOBALISED ECOSYSTEM



TELECOM VALUE CHAIN



FOUR PRIORITISED AREAS OF FOCUS FOR INDUSTRY COLLABORATION



PERSONAL DATA

Becoming the secure guardians of consumer data by developing interoperable web-based and SIM-based digital identity solutions



CONNECTED LIVING

Connecting the digital and physical worlds through the Machine SIM and 'Internet of Things' optimised networks



DIGITAL COMMERCE

Enabling and building the digital commerce ecosystem through a standardised business-to-business wallet backend and interoperable mobile money solutions



NETWORK 2020

Creating the networks for secure, smart and seamless services that support native operator IP communications and IP wholesale models for differentiated quality of service levels