



2016 Mobile Industry Impact Report: Sustainable Development Goals

Executive Summary





About the GSMA

The GSMA represents the interests of mobile operators worldwide, uniting nearly 800 operators with almost 300 companies in the broader mobile ecosystem, including handset and device makers, software companies, equipment providers and internet companies, as well as organisations in adjacent industry sectors. The GSMA also produces industry-leading events such as Mobile World Congress, Mobile World Congress Shanghai, Mobile World Congress Americas and the Mobile 360 Series of conferences.

For more information, please visit the GSMA corporate website at www.gsma.com

Follow the GSMA on Twitter: [@GSMA](https://twitter.com/GSMA)

Deloitte.

“Deloitte” is the brand under which more than 220,000 professionals in independent firms throughout 150 countries and territories collaborate to provide audit, tax, consulting, financial advisory, risk management, and related services to select clients.

These firms are members of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee (“DTTL”).

Sam Baker
Partner
Monitor Deloitte, TMT Industry Group
sambaker@deloitte.co.uk
www.deloitte.co.uk

CONTENTS

Foreword 2

Quotes 7

Executive Summary 10

The Mobile Industry and Purpose **11**

The Sustainable Development Goals **12**

This Report: The Mobile Industry Impact Report: Sustainable Development Goals **14**

Key Findings: Impact Analysis **17**

 Sustainable Business Policies and Practices **21**

 The Industry's Commercial Model **21**

Outlook **22**

The Industry Commitment and a Call to Action **24**



FOREWORD





Building on the work undertaken through the Millennium Development Goals, in September 2015, United Nations Member States adopted an even more ambitious agenda – the 2030 Agenda for Sustainable Development, including 17 Sustainable Development Goals, or SDGs. The SDGs represent a qualitatively different view of what human society can become. They provide a set of integrated, and indivisible, priorities for people, planet, prosperity, partnership, and peace.

Achieving the SDGs demands new technologies, innovations, and data collection that can integrate and complement traditional statistics.

A driving force behind this data revolution is mobile technology.

Mobile phone technology has already transformed societies around the globe, even the poorest countries and communities. It is helping to empower women, create jobs, spur financial independence, improve education, boost agriculture production, and promote better health. Mobile phones have enabled

communities to monitor elections, hold governments accountable, and save lives in natural disasters.

As we focus on implementing the Sustainable Development Goals, **the mobile industry has a critical role** in working with governments and the international community to expand connectivity, to lower barriers to access, and to ensure that tools and applications are developed with vulnerable communities in mind.

Mobile operators around the world are already working to address the SDGs. The *2016 Mobile Industry Impact Report* offers critical insights into the collective efforts of the mobile industry in helping to achieve the ambitious targets set forth by the Goals. I look forward to working closely with the mobile industry to develop a roadmap to extend its engagement and create significant impact. Together, supporting the Sustainable Development Goals, we can build a future of dignity and opportunity, where no one is left behind.

David Nabarro

Special Adviser of the United Nations Secretary-General on the 2030 Agenda for Sustainable Development

CONNECTING EVERYONE AND EVERYTHING TO A BETTER FUTURE



#betterfuture



It's an ambitious goal and, although we have made significant progress in a short period of time, we still have much more to do to achieve this. Globally, more than 4.7 billion men and women subscribe to a mobile service – almost two-thirds of the world's population – and this is expected to reach 5.6 billion people in 2020.

The mobile industry is also connecting billions of people to the internet – **mobile is the dominant platform for internet access in many parts of the world**, given the lack of alternative infrastructure. By 2020, just under 60 per cent of the global population will be on the mobile internet, but this also means that 40 per cent of the world still will not have access.

We must change this – and it's something our industry is very focused on – extending network coverage to rural areas, improving affordability of mobile services, delivering locally relevant content and increasing digital skills and literacy.

It's not just about connectivity – and that is a very important first step – it's about what this connectivity enables. It really is about *Connecting Everyone and Everything to a Better Future*.

As an industry, we now have an important opportunity to **leverage the mobile networks that we have built and the services we deliver to help achieve the Sustainable Development Goals**. With a far-reaching and ambitious agenda, the Goals truly define what this “better future” will be.

Mobile networks are transforming the world and are a revolutionary force in overturning the status quo – and they **are essential in achieving the Goals**, whether it's ensuring healthy lives and promoting well-being for all; achieving gender equality and empowering women and girls; making cities and settlements inclusive, safe, resilient and sustainable; or helping to combat climate change and its impacts.

In February 2016, the mobile industry became the first sector to commit to the Sustainable Development Goals. With the publication of the *2016 Mobile Industry Impact Report*, we are reaffirming that commitment and creating a framework through which we can assess our success in attaining the Goals.

Working together as an industry, with other sectors, governments and key stakeholders, I do believe **we can make a real difference in people's lives**.

Mats Granryd

Director General
GSMA



QUOTES



The private sector will play an essential role in achieving the Sustainable Development Goals. The most important contribution a company can make is to do business responsibly, and then find opportunities to innovate around these ambitious global goals. Smart companies and industries that readily embrace this new agenda will be the leaders of tomorrow.

Lise Kingo, Executive Director of the United Nations Global Compact



COMMITTED TO
IMPROVING THE STATE
OF THE WORLD

Progress happens by bringing together people who have the drive and the influence to make positive change. The United Nations Sustainable Development Goals provide the opportunity for engagement to address our most pressing global challenges but they cannot be realised without the business community. With digital transformation at the core of our economies and society, mobile connectivity has the potential to transform our lives and help achieve each of the SDGs.

Prof. Klaus Schwab, Founder and Executive Chairman, World Economic Forum

UNSGSA

UNITED NATIONS SECRETARY GENERAL'S
SPECIAL ADVOCATE FOR INCLUSIVE FINANCE FOR DEVELOPMENT



By giving people the means to improve their own lives, financial inclusion offers an invaluable tool to strengthen human development and empowerment. Evidence increasingly shows strong links between financial inclusion and the SDGs—for example, helping to reduce extreme poverty, hunger, and gender inequality, and fostering education.

The global community has made significant progress expanding financial services in recent years, but 2 billion people are still excluded from the financial system, most of them poor. The mobile industry holds an important key to expanding financial inclusion and enabling development progress. Mobile network operators have already done much to bring digital financial services to the unbanked in Kenya, Pakistan, and the Philippines. If the industry can work with regulators and others to improve customer adoption, usage, and protection, it will have a formidable impact on financial inclusion and on the Sustainable Development Goals, and will also contribute to the stability and the integrity of the financial sector.

H.M. Queen Máxima of the Netherlands, United Nations Secretary-General's Special Advocate for Inclusive Finance for Development (UNSGSA)



The proliferation of mobile cellular telephony was one of the most important elements in bringing the power of telecommunications to billions of people across the world. Now, with mobile broadband emerging as one of the fastest-growing technologies of all time, we have the potential to empower tremendous advances in critical areas such as education, healthcare, environmental management and poverty reduction. ICTs will be absolutely critical meeting each of the 17 SDGs and mobile technology will continue to be at the very heart of future development.

Houlin Zhao, Secretary-General, International Telecommunication Union (ITU)



The world recognises the power of mobile technology to change lives and improve livelihoods. Our Commission members Safaricom, Ericsson and Vodafone, together with other service providers are opening access to markets, financial services and critical health resources for the most challenged communities. The Sustainable Development Goals provide an opportunity to scale-up this impact, and the GSMA, through this inspiring report, is showing how mobile operators can be at the heart of sustainable, inclusive growth.

Jeremy Oppenheim, Director, Business and Sustainable Development Commission



COMMONWEALTH
TELECOMMUNICATIONS
ORGANISATION

The immensely positive impact of mobile technology on people's lives is ever growing and becoming ever wider. Yet, with the advancement of technology, much more can and should be done to further improve lives in areas such as health, education and the environment as well as to empower people. For this to be possible, other factors come into play beyond technology; among these factors are the national policy and regulatory environments which must be more conducive to investment in broadband access, innovative technology applications and a secure cyberspace which provides the assurance needed for users to maximise the potentials of cyberspace. Our collective efforts must not overlook these factors if we are to make use of technology to achieve the 2030 Agenda for Sustainable Development. GSMA's 2016 Mobile Industry Impact Report: Sustainable Development Goals provides us with an early insight into how mobile technology can support this new agenda.

Shola Taylor, Secretary-General, Commonwealth Telecommunications Organisation (CTO)



Private sector organisations and industries need a way of measuring their impact on the SDGs before they can align their purpose, their strategies and their operating models. I am pleased to see the mobile industry stepping forward and developing this rigorous approach to SDG impact assessment, it's the first of its kind and I hope it will stimulate other industries and organisations to follow a similar approach, catalysing alignment to a common view of a better future for all.

David J O Cruickshank, Global Chairman, Deloitte Touche Tohmatsu Limited



This first-of-its-kind report establishes how the mobile industry impacts the United Nations Sustainable Development Goals, and highlights the opportunities for enhancing this impact moving forward. It provides the foundation for a set of commitments that will ensure that the SDGs are an enduring influence on our industry's roadmap, and will drive us in our ambition to create a better future for all.

Dr Nasser Marafih, GSMA Foundation Board, Member of the Ooredoo Group Board and Advisor to the Chairman, Ooredoo



This year, the mobile industry became the first to commit to supporting the United Nations Sustainable Development Goals. This report establishes a baseline for the industry's contribution to date, and will become an essential reference for all stakeholders to track our progress against the SDGs in the future. We hope that it inspires all partners including governments, civil society and other industries to commit to the achieving the goals and working together to build a better future.

Johan Dannelind, President and Chief Executive Officer, Telia



The SDGs provide companies an opportunity to help meet targets which achieve financial performance and have impact on people and the planet. The mobile industry is taking leadership in this report by publishing an assessment of where it stands today vis-a-vis the goals of the SDGs and how it can accelerate the progress towards impact.

Sonal Shah, Economist and Executive Director, Beeck Center for Social Impact and Innovation, Georgetown University and GSMA Foundation Board Member



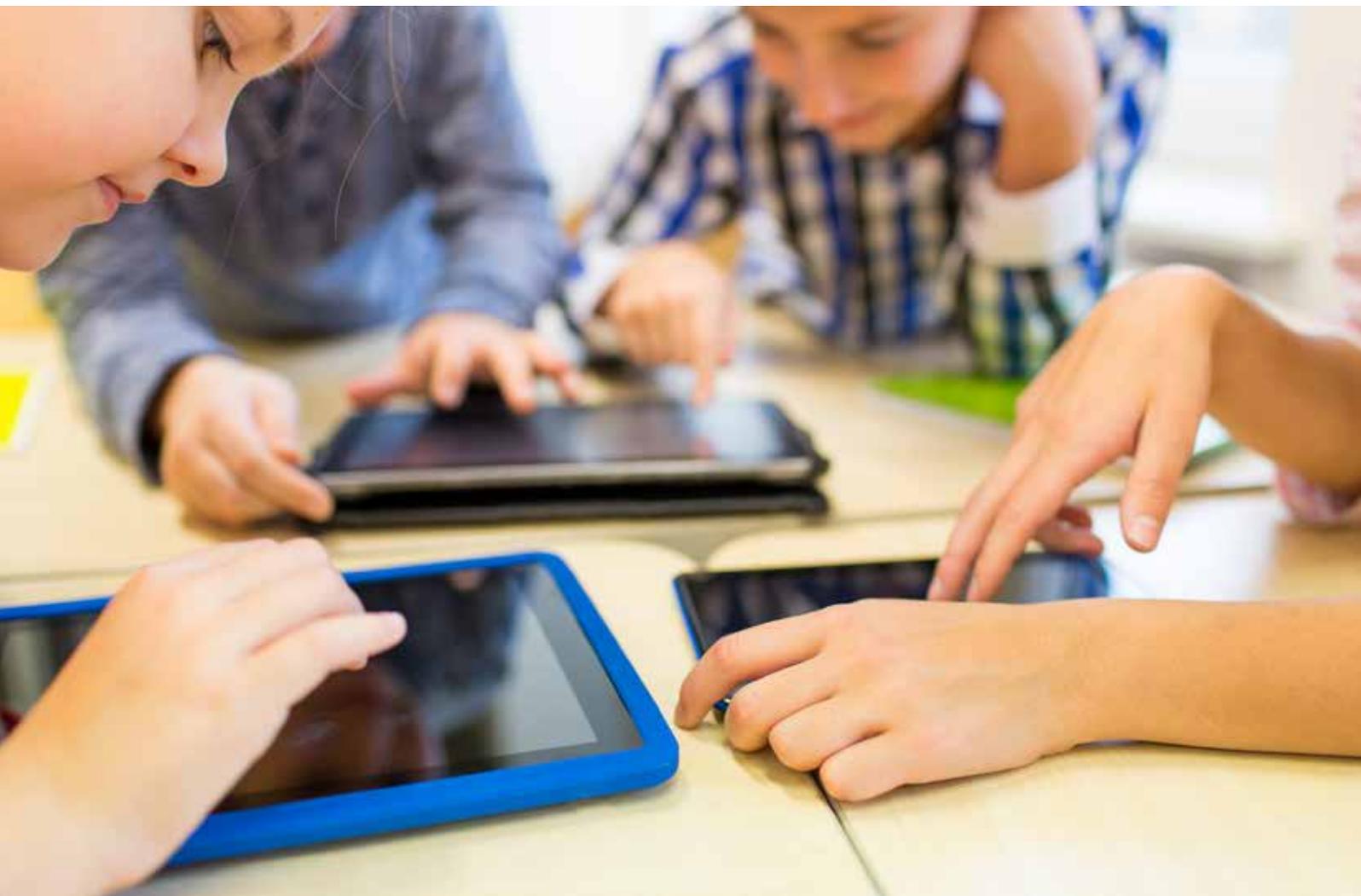
This ground-breaking report offers a strong assessment of how the mobile industry is living its purpose to 'Connect Everyone and Everything to a Better Future'. It provides a roadmap for maximising our impact on the United Nations Sustainable Development Goals going forward. We are convinced that mobile operators are playing a crucial role in establishing a sustainable future for all. Connectivity through mobile is ground-breaking for everyone to tap into the digital present and future.

Jon Fredrik Baksaas, Chairman, GSMA

EXECUTIVE SUMMARY

THE MOBILE INDUSTRY AND PURPOSE

This first-of-its-kind report offers critical insights into the transformative impact of the mobile industry on individuals, societies and economies around the world, in developed and developing markets. Importantly, it establishes a benchmark through which the industry will assess its success in contributing to the Sustainable Development Goals (SDGs) and serves as a blueprint for other industries as they commit to achieving the SDGs.



THE MOBILE INDUSTRY

The mobile industry has moved from being a luxury service provider in an analogue economy to providing the foundations of all interactions in the digital world:

- Two thirds of the world, or 4.7 billion unique subscribers¹, are now connected by mobile networks with approximately 200 million additional people being connected each year;
- 2.2 billion people have mobile broadband, enabling them to participate in the digital economy;
- At the end of 2015, there were more than 310 million Internet of Things (IoT) / machine-to-machine (M2M) connections, with growth forecast to drive this to one billion connections by 2020, demonstrating the emerging scale and scope of the digital world and the mobile industry's role within it.²

CONNECTING EVERYONE AND EVERYTHING TO A BETTER FUTURE

The mobile industry purpose, “Connecting Everyone and Everything to a Better Future”, was launched at Mobile World Congress (MWC) 2016 in Barcelona, and formally acknowledges the responsibility that comes with owning and operating the networks that have such pervasive reach and such influence on our lives. There are three parts to this purpose:

INCLUSION “Connecting Everyone”:

Around three billion people remain unconnected and a further 2.4 billion people are connected to voice and simple text services only;

INNOVATION “Connecting Everything”:

IoT is developing rapidly, but the level of penetration remains low. A core part of the purpose is to contribute to the development of IoT and the promise it brings;

INFLUENCE “A Better Future”:

The industry recognises that connectivity is transformational and that operators have a collective responsibility to influence how this connectivity is used.

1. Source: GSMA Intelligence, The Mobile Economy 2016 (<https://www.gsmainelligence.com/research/?file=97928efe09cda2864cdf1ad1a2f58c&download>)
2. Source: GSMA Intelligence data, Deloitte analysis (2016)

THE SUSTAINABLE DEVELOPMENT GOALS

On 25 September 2015, the heads of state, government and High Representatives issued a declaration from the UN headquarters adopting the SDGs and their targets, and committing to work together to change the world.³

The SDGs follow the Millennium Development Goals (MDGs), which focused on the challenges of poverty and human development in poorer countries. The MDGs succeeded in demonstrating the power of shared goals. The SDGs are far broader, integrating the economic, social and environmental agendas across all geographies and applying both to developed and developing economies. The SDGs apply to all of us with no exceptions, and provide a universally agreed definition of “a better future”.

The 17 SDGs, with 169 associated targets, represent a breath-taking level of ambition in both the scale and scope of change, with timelines for achievement in 2030 or earlier. The SDGs have been developed at a time when the global economic growth of the last decades (which benefited the MDGs) is uncertain, and some key indicators, particularly those relating to equality, inclusion and environmental sustainability, are tracking in the wrong direction³.

Successful delivery of the SDGs requires major changes to the way different economies and their underlying sectors work together globally, as well as the speed at which innovative ideas and best practice are propagated around the world. The evolving digital economy provides an opportunity to do things very differently and the mobile industry has a foundational position in this evolution.

Governments, sectors, and individual organisations are beginning to formally recognise the SDGs and develop action plans. Sharing approaches, knowledge, and capabilities will be critically important in this phase to ensure that best practice is followed, and that the route to implementation is as efficient and effective as possible. The mobile industry seeks to be an exemplar in terms of its level of commitment and its desire to lead, having first committed to the SDGs in February 2016 at Mobile World Congress in Barcelona.

3. Source: UN, Transforming our world: the 2030 Agenda for Sustainable Development (<https://sustainabledevelopment.un.org/post2015/transformingourworld>)



THIS REPORT: THE MOBILE INDUSTRY IMPACT REPORT: SUSTAINABLE DEVELOPMENT GOALS

This report is a critical input into the development of a comprehensive SDG implementation plan for the mobile industry. The report links the mobile industry's activities to the SDGs and their targets, and assesses the impact of these activities on the SDGs. This body of evidence is then used to reflect on the implications of current trends and what the industry can do to enhance impact. The development of the report has created a framework, approach, dataset, model and narrative that can be adopted by other sectors and organisations embarking on this journey.

The development of this report and its associated assets has four main objectives:

- 1** Facilitate progress reporting through the creation of a common, measureable system that links the industry's activities to their impact on the SDGs and their associated targets;
- 2** Provide an input into industry decisions on strategy, planning and investment;
- 3** Allow the mobile industry to engage more effectively with existing or new partners on the basis of the impact on the SDGs;
- 4** Create a framework that can be shared with others in the mobile communications ecosystem, as well as with other industries.

This is year 1 of the report. As it evolves, improved and more complete data sets will be built, and coverage of specific areas of industry focus will no doubt become more detailed. Nevertheless, it is an important step in establishing a robust framework that quantifies impact. As the first of its type, the impact report

will also benefit others as they develop their own approaches. The mobile industry firmly believes that effective measurement and reporting is an important component of driving the necessary change, and as such commits to continuing to develop this approach and to report on a yearly basis.

The approach to developing the impact analysis that underpins the report has four principal stages:



Target filtering: Identifying the SDG targets that the mobile industry can impact in a significant way. Those excluded are typically focused on state intervention or policy (with the exception of specific mobile industry policy that the GSMA and broader industry actively contribute to). Just under half of the 169 targets have been selected.



Driver definition: Describing how industry activity drives the impact against the target. This might be discrete to the industry, or an activity that the industry participates in. Approximately 110 drivers have been defined.



Driver importance assessment: An assessment of the importance of the driver in contributing to the target. This reflects the breadth of each of the targets: in every case, the mobile industry is not the sole contributor as other sectors and types of organisation also contribute.



Metric identification and measurement: Metrics are then developed for each driver, and measures across 90 countries were identified to allow quantification of performance. Metrics are typically proxies rather than precise measures of the driver, and are built up from about 50 variables.

This allows the creation of scores which assess the contribution of the mobile industry against both the targets and SDGs. These scores can be compared and used as a baseline in subsequent years. As the methodology and data sets evolve, 2016 can be updated to ensure a comparable year-on-year story.

The framework is robust, but the population of the framework requires significant judgement, which in turn requires knowledge and understanding both of the industry and of the targets. As such, input has been

sought from a wide range of operators and experts, on the industry, on reporting and on sustainability. The support of the 24 operators represented on the GSMA board has been critical to the process, as has GSMA staff expertise.

The most critical inputs have been from a working group of 15 operators, and the GSMA programme teams, comprised of world-leading experts in their own domains, for example, mobile money or cellular infrastructure.

While the report is primarily focused on the assessment of impact across the SDGs, and the forward-looking implications of that analysis, there are three additional topics covered:



Sustainable business policies and practices: Acknowledgement that the mobile industry has a primary responsibility to respect and uphold universal principles of responsible business in areas such as human rights, labour, environment and anti-corruption in the conduct of their business;



The industry's commercial model: Reflections on the strength and sustainability of the commercial model in light of the current and expected impact on the SDGs;



Commitments: A series of commitments by the industry to further promote the SDGs, enhance the industry impact on the SDGs, and advance the capability of other sectors to also contribute.



KEY FINDINGS: IMPACT ANALYSIS

All SDGs are impacted by the mobile industry to varying degrees, with the greatest impact being felt on: SDG 9: Industry, Innovation and Infrastructure, SDG 1: No Poverty, SDG 4: Quality Education and SDG 13: Climate Action. The way the industry contributes across these four SDGs differs significantly:

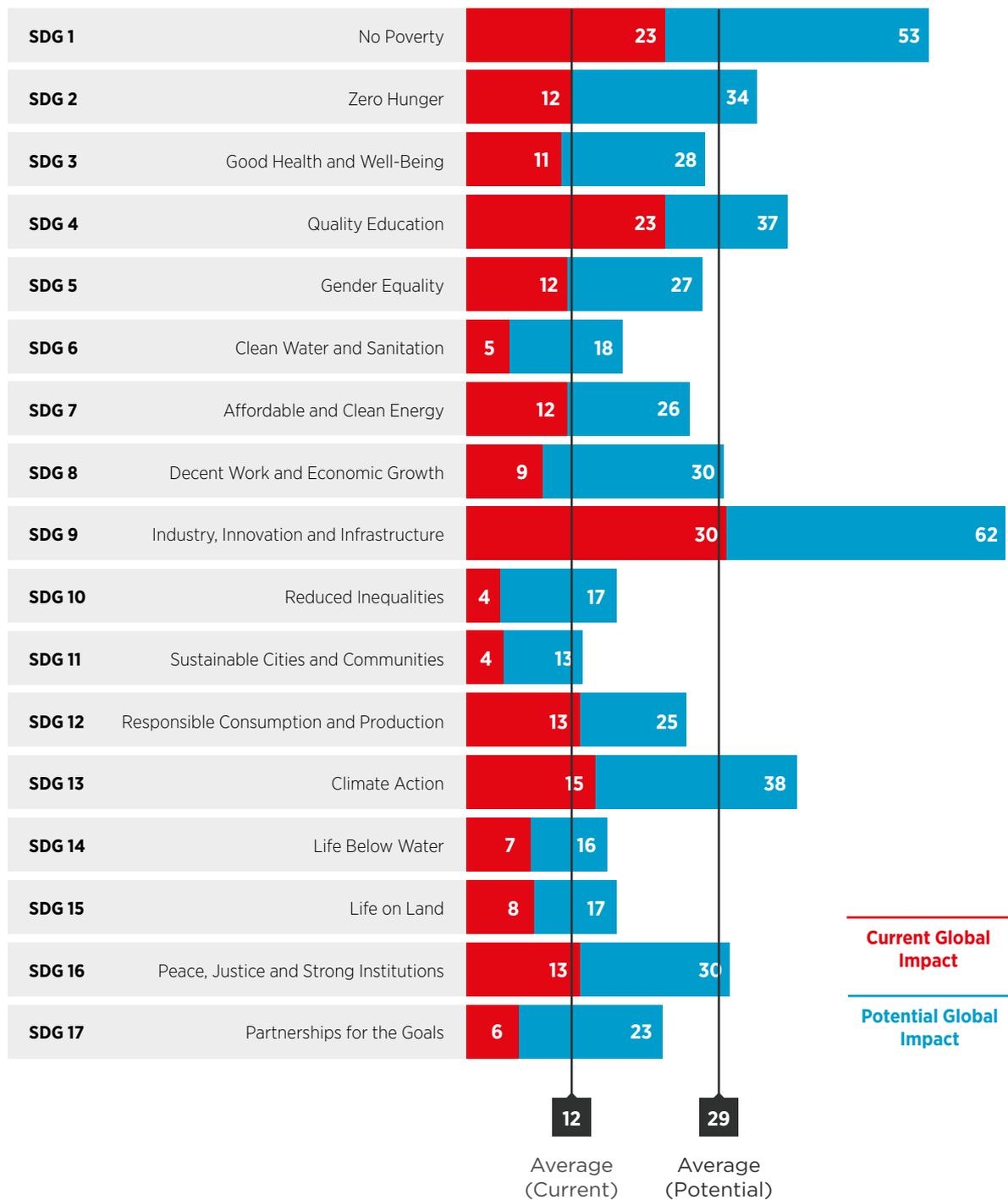
- **SDG 9** calls for resilient infrastructure, sustainable and inclusive industrialisation, and innovation. The industry makes a powerful contribution through: extending and upgrading its infrastructure; connecting remote, less-included communities; stimulating economic participation; and supporting IoT-related innovation.
- **SDG 1** focuses on eradicating poverty, providing equal access to economic resources, and building the resilience of the poor. The industry plays its part by stimulating economic participation and activity through voice and data services; providing affordable connectivity; and acting as a provider of financial services to developing economies, including the powerful platform of mobile remittances that is particularly valuable to underserved communities.
- **SDG 4** targets significant improvements in the quality of, and access to, good education across formal and more skills-based categories. The industry primarily impacts this SDG by providing connectivity to schools and learners, giving access to digital resources. The industry also provides educational platforms directly, including content, and facilitates the purchase of school-related services in poorer economies through mobile money.
- **SDG 13** seeks improvements in community resilience to the effects of climate change and improved planning and management. The industry contributes by providing emergency communications systems, connectivity and tailored services, e.g. broadcasts at times of disaster and early warning systems based on data analytics, sensors, and crowd sourcing.

It is important to note that the impact scoring of these four SDGs does not imply prioritisation on behalf of the industry. The scores reflect the number of targets that can currently be materially influenced by what the industry currently does, the importance of the industry to those targets, and a measure of performance using industry metrics. In future years, as progress is tracked against plan, a sense of prioritisation might be inferred.

A key factor in establishing the proportion of the targets selected is the exclusion of those that emphasise policy or state intervention, for example the eighth target (11.a) under SDG 11: Sustainable Cities and Communities is “Support positive economic, social and environmental links between urban, peri-urban and rural areas by strengthening national and regional development planning”. Whilst mobile communications will undoubtedly be involved in these processes at some stage, no compelling mobile industry driver was identified with sufficient distinctiveness and impact, so that target is excluded.

The second main influence is the performance of the drivers as measured by the metrics. Drivers that contribute through, for instance, basic connectivity, will be measured by a metric related to penetration and will have a high performance score. Drivers that contribute through the emerging features and capabilities of the industry e.g. M2M investment or IoT, will have a lower performance score.

FIGURE 1
Current and Maximum Potential SDG Impact Scores⁴



4. Note: Maximum Potential is based on every country reaching the maximum potential score for each metric used to measure Impact. In this scenario the number of targets impacted, and importance of the industry to those targets remains as current.

Figure 1 above shows the current performance scores and the potential. The potential assumes that the industry maximises performance but does not increase the number of targets it can significantly influence; that is, the core business model stays intact. However, the industry could choose to collaborate in areas outside that model, for example, by playing a leading role in urban planning, in which case the potential could be significantly higher than shown here. Scaling the existing business model alone could deliver over two times the current impact for the higher scoring SDGs and over three times for the lower scoring SDGs: allowing the industry to map out continued evolution against these 2030 targets.

The industry activities that drive impact are spread across the value chain: 30% are operational activities, 27% are related to the primary output of the industry: connectivity, 32% are related to services or content that are based on that connectivity, and 11% are assessed as non-core. Example of drivers by value chain classification include:

- **Mobile Network Operator (MNO) operations:** Increasing the energy efficiency of operating infrastructure such as base stations and data centres (contributes to both SDG 7: Affordable and Clean Energy and SDG 12: Responsible Consumption and Production);
- **Connectivity:** Provide affordable access to basic voice and data services to enable access to primary and secondary e-learning (SDG 4: Quality Education);
- **Service or content platform:** Support low-cost, accessible remittance services in developing areas (SDG 1: No Poverty);
- **Non-core activities:** Actively seek engagement with public and private organisations to promote sustainability (SDG 17: Partnerships for the Goals).

Impact is also influenced by the directness of the relationship between the specific industry activity and the target. There are three categories: direct (no intervening stage or third party required), indirect (requiring third-party collaboration or intervention) and systemic (impact that requires the interaction of multiple parties over time). Whilst there will be significant systemic impact, that impact is much more difficult to attribute. As a result, 90% of the drivers are direct or indirect. Examples of each category includes:

- **Direct:** Provide an affordable mobile service entry point to women in all areas (SDG 5: Gender Equality);
- **Indirect:** Provide communications services to stimulate local business and economic growth in poor communities (SDG 1: No Poverty);
- **Systemic:** Connect remote communities to digital agricultural marketplaces to improve price outcomes and increase the income of farmers (SDG 2: Zero Hunger).

The metrics and measures have been collected at country level, which can be aggregated to provide a view on impact by region or other country grouping. Some of the targets are location-specific, in which case the score pertains only to performance in the target location. The more developed regions typically score better on those drivers driven by core infrastructure roll-out and investment in new technologies, but less well in terms of environmental impact e.g. measures of e-waste. The less developed regions typically score less well on aggregate, reflecting the lower levels of infrastructural investment and inclusion. For instance, the 3G coverage across developed countries is 98% and 1.4 kg of e-waste is generated annually per person, while in developing countries coverage is 74% and e-waste generation is 0.4 kg per person⁵. These are broad generalisations and there are plenty of differences between regions that are explored in the report.

5. ITU and UN data, Deloitte analysis: both coverage and e-waste per population calculated as simple averages across all countries in group

A photograph of a person from the back, wearing a white long-sleeved shirt and a dark backpack. They are holding a device in their right hand and have earphones in their ears. The entire image is overlaid with a semi-transparent red color. The text "#betterfuture" is centered in white.

#betterfuture

Sustainable business policies and practices

The impact analysis maps out the industry drivers that influence the SDGs. It does not comprehensively describe or analyse the company operations and the extent to which they adhere to sustainable business policies and practices. However, that should not be taken as an indication that sustainable business policies and practices are unimportant. The industry recognises that both need to be in place to lead.

Adherence to policy and implementation is implied by the proportion of the industry that signs up to the UN Global Compact ten principles, and the extent to which progress is reported against in sustainability reports. Operators belonging to groups that collectively represent more than 4 billion subscribers globally

have signed up so far to the UN Global Compact ten principles, and the industry has a number of operators at the top of the Dow Jones Sustainability Index (DJSI).

However, as the industry develops, there are plenty of challenges to manage, not least privacy and data protection, e-waste and the increasing energy requirements driven in part by the exponential growth in demand for and usage of mobile data. As such, progress in this area forms part of the commitment that the mobile industry is making to the SDGs, the industry purpose, and its place in the world.

The industry's commercial model

Much is expected of the industry, both by itself and others, and this will require continued investment in infrastructure, as well as innovation in areas like IoT. Periods of increased investment have always been a feature of the industry and operators - with the participation of customers, business partners and regulators - have managed to keep profitability at a level that attracts continued funding.

However, this model differs significantly by operator, and by country operations within operators; in aggregate there has been some year-on-year profitability decline. The core participants in the industry and its markets need to continue to work

together to ensure the sustainability and affordability of the model, as well as the continued investment and radical improvements in functionality, that have been characteristic of the industry.

To be clear, the industry does not see a trade-off between the delivery of impact against the SDGs and a robust financial model. Quite the opposite: a clear and leading contribution to the broader social, environmental and economic challenges of the world is critical to a sustainable, investable sector of the size and scope of the mobile industry.

OUTLOOK

The impact analysis demonstrates that the core business of the mobile industry impacts all SDGs. The industry is continuing to grow, and as such, it can be expected that the impact made will grow. To meaningfully accelerate progress against the SDGs, there are three main ways that the mobile industry can drive impact in line with its purpose:

**CONNECTING
EVERYONE AND
EVERYTHING TO A
BETTER FUTURE**

Industry Purpose

SDG Impact Accelerator

INCLUSION
Connecting
Everyone

Scaling networks and access: expanding the global mobile network footprint and connecting subscribers to voice and data services.

INNOVATION
Connecting
Everything

Innovation: creating new ways to enhance the quality of connectivity and ease of access; and innovating mobile-enabled platform services to meet sustainable development needs (e.g. mobile identity and M2M).

INFLUENCE
A Better
Future

Policy and partnerships: contributing to sustainable development policy alongside governments and agencies, both as an industry and together with other partners.

However, this ambition to accelerate progress highlights some challenges moving forward:

- Achieving continued growth will be more difficult and require more investment. The unconnected are likely to be harder to reach and less able to afford connectivity than those already connected, and this comes as growth in data places additional demands on the existing networks. Access and affordability are the critical customer-side constraints and will require technical and commercial innovation together with policy changes to address sustainability.
- The current rate of change, particularly given the constraints noted above, may not be sufficient in the light of the radical and transformational demands of the SDGs. The industry needs to challenge itself and its ecosystem to accelerate change in the most important areas.
- The impact analysis, not surprisingly, shows that impact is unevenly distributed across geographies and, where data is available, within geographies. Inclusiveness is a critical principle underlying almost all of the SDGs. The industry needs to engage with

broader stakeholders to promote inclusiveness and eliminate the digital divide.

- The reach and utility of the mobile network provides the industry with greater influence than it currently exerts. The number of targets excluded from the impact analysis should be scrutinised, and the industry can come together to influence some of those policy or state interventions that the SDGs require. The digital economy needs steering to avoid the negative outcomes of concentration and inequality, and the industry has a strong role to play here, together with governments and other governing bodies.

Addressing these challenges will accelerate the impact on the SDGs, and through that, their achievement. Many of the challenges listed above are being addressed by individual operators; the key overarching challenge is being able to work together as an industry, together with the right third parties, including the UN, to harness the potential.

THE INDUSTRY COMMITMENT AND A CALL TO ACTION

The mobile industry recognises the challenges and opportunities laid out in this report and is ready to make a series of public commitments that will solidify the next, critical steps. These commitments are wholly in line with our stated industry purpose.

The industry is resolute in its ambition to create to a #betterfuture and commits to:

- Partner with the UN to develop a road map for the mobile industry, with an initial focus on humanitarian assistance;
- Become a lead advocate of SDG impact reporting and sustainability principles, including the UN Global Compact ten principles;

- Utilise the industry's convening power to drive further SDG engagement and commitment.

Each of these commitments will involve mobile network operators, the wider supply chain and also third parties motivated to act in a similar way. The industry firmly believes these commitments lay the foundation for a transformational change of the industry position and impact and, with it, a transformation in the ability of the world to achieve the SDGs.

The industry wants to do this in an open and collaborative way and, as such, challenges all business partners, regulators, customers, governments and other industries to help us shape our plans, engage with us as we execute, challenge us to do more and help us all share in a better future.

The full report can be downloaded at
www.gsma.com/betterfuture/2016SDGImpactReport/



GSMA HEAD OFFICE

Floor 2
The Walbrook Building
25 Walbrook
London EC4N 8AF
United Kingdom
Tel: +44 (0)20 7356 0600
Fax: +44 (0)20 7356 0601

Copyright © 2016 GSM Association

