

Connecting the Next Billions

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About the GSMA



The GSMA represents the interests of mobile operators worldwide. Spanning more than 220 countries, the GSMA unites nearly 800 of the world's mobile operators, as well as more than 230 companies in the broader mobile ecosystem.



GSMA Industry Initiatives



Connected Living



Mobile Commerce



Future Communications



Mobile Identity



Spectrum



Network APIs

GSMA Focus Areas



Industry Strategy

- Market Intelligence
- Strategic Segmentation
- Programme Prioritisation



Public Policy

- Health
- Net Neutrality
- Privacy
- Taxation



Technology

- Embedded SIM
- Security
- Smarter Applications
- WiFi Roaming



Mobile for Development

- Green Power for Mobile
- Mobile Enabled Community Services
- mHealth
- mWomen

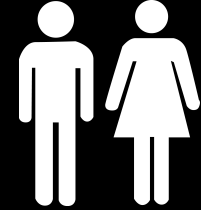
Today's Mobile Economy - Snapshot



6,800,000,000



MOBILE CONNECTIONS



3,200,000,000

MOBILE SUBSCRIBERS (INDIVIDUAL)



1,600,000,000



MOBILE BROADBAND CONNECTIONS



US \$199,000,000,000

MOBILE INDUSTRY INVESTMENT



8,500,000



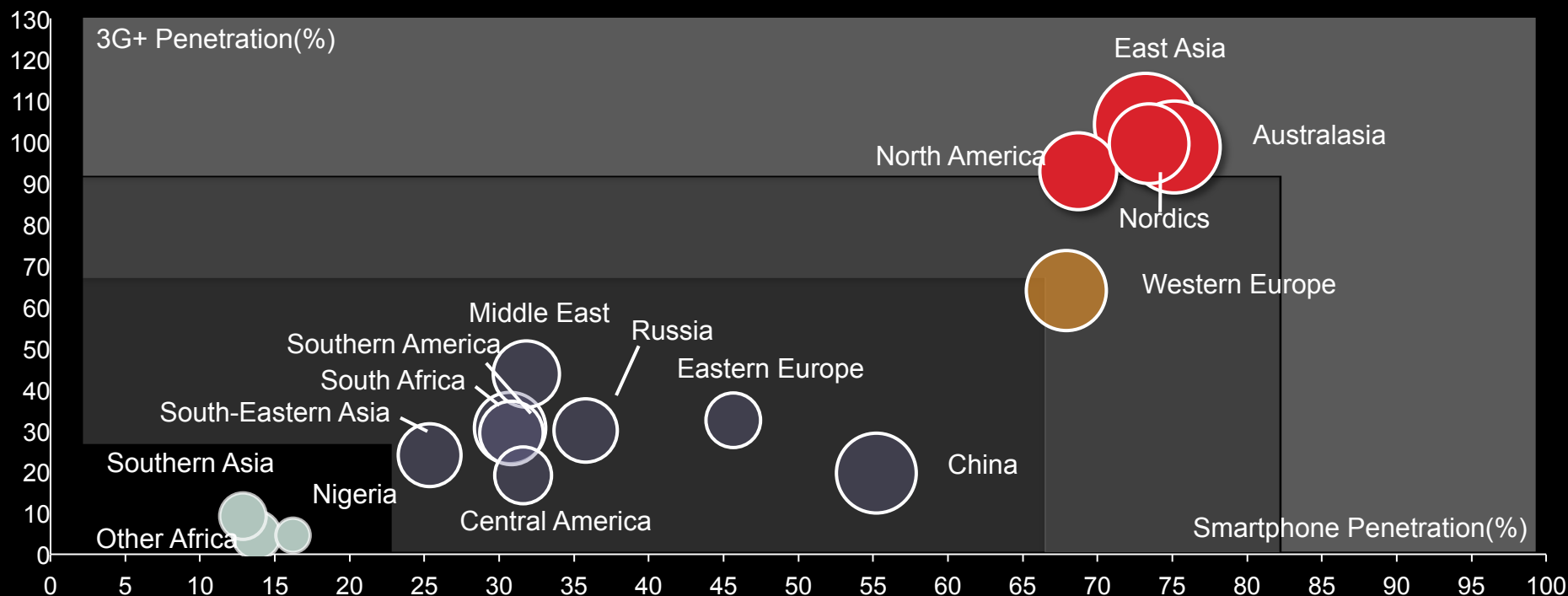
TOTAL ECOSYSTEM JOBS

But we are just beginning...

Mobile Market Segmentation

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

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



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).

Mobile: Enabling Greater Access



Green Power for Mobile



- Extending the coverage, reducing the cost and minimising the environmental impact of mobile networks through renewable energy
- In partnership with IFC, more than \$1 billion of investment has been catalysed into renewable energy for the mobile industry
- Green Power has contributed to the deployment of more than 34,000 green sites globally
- Reducing CO² emissions by approximately 1.7 million tonnes per year

Community Power from Mobile



- Launched in 2010 by GSMA and Lighting Africa, a joint IFC and World Bank programme
- Designed to encourage operators and tower-sharing companies to provide excess power generated by base stations to local, off-grid communities
- 5 kilowatts of excess power can charge thousands of handsets, provide electricity to 30 homes and power 15 vaccination fridges or 2 clinics

Mobile Enabled Community Services

- 1.3 billion people are without access to energy and 783 million people do not have access to 'improved' water resources
- More than 3.4 million people die each year from water, sanitation and hygiene-related causes
- Programme leverages mobile technology and infrastructure to improve access to basic energy and water services in underserved communities
- Supported by £4.1 million grant from UK Department for International Development



mWomen Programme



- Launched in October 2010
- Goal to reduce mobile phone gender gap – 300 million fewer women own phones than men
- Unprecedented global public-private partnership between mobile industry and international development community
- mWomen Global Development Alliance in partnership with USAID, AusAID and Visa, Inc.
- Provides research, grants, toolkits, best practices and knowledge sharing

Mobile Money for the Unbanked



- 167 live Mobile Money for the Unbanked services, 41 of which were launched in 2012
- 107 additional deployments planned
- 82 million registered customers globally as of June 2012
- Deployments reaching scale - 6 services with more than 1 million active customer accounts

What Do We Need to Succeed?

- Availability of **low-cost devices and services** is vital
- Access to **globally harmonised spectrum** is fundamental to the development of Mobile Broadband
- Release of **700/800/900 MHz and Digital Dividend spectrum** should be a priority for governments
- **Taxation and sector-specific taxes should be reduced** to enable citizens' access to mobile services
- **Regulatory and policy transparency and certainty** are critical in fostering investment from mobile operators
- **Continued partnership and support** from organisations such as the World Bank and IFC

Thank You!

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