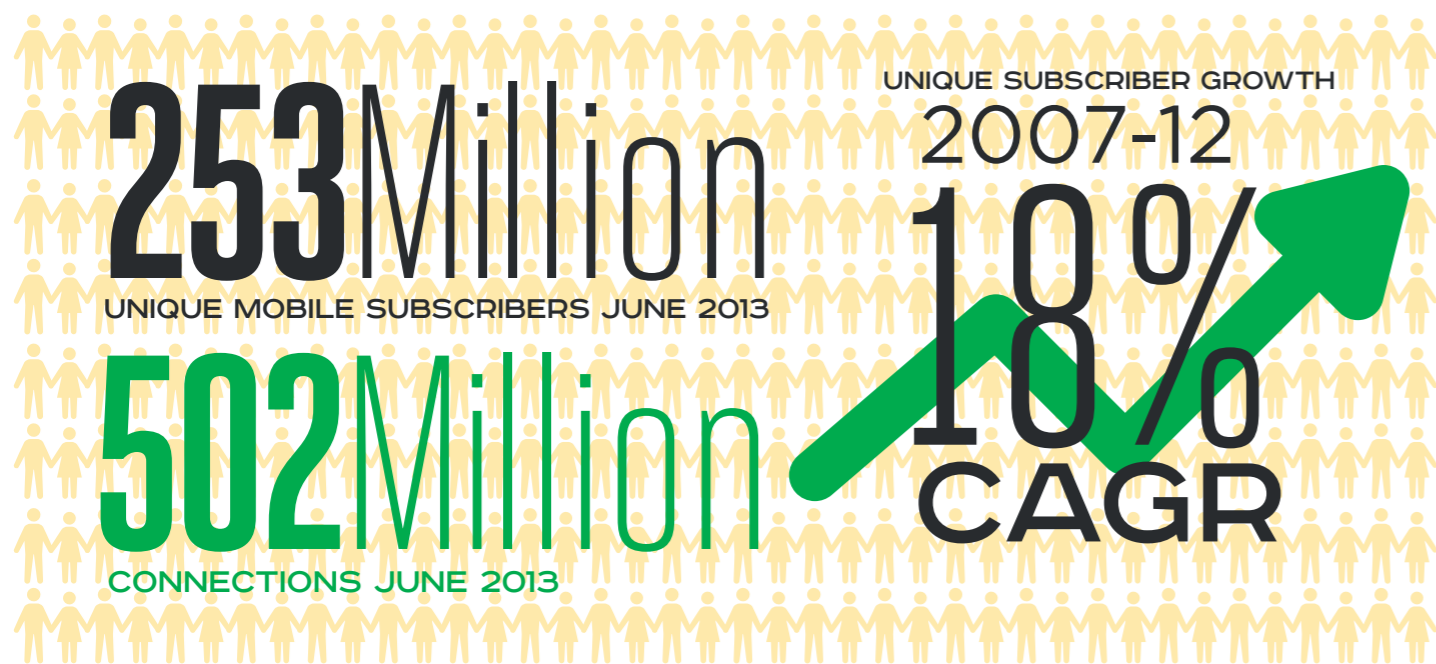


MOBILE ECONOMY SUB-SAHARAN AFRICA

Unique Subscribers and SIM Connections



Growth

Huge growth potential remains as average subscriber mobile penetration is 31% across 40 countries in Sub-Saharan Africa (SSA)

UNIQUE SUBSCRIBERS TO GROW
43% BY 2017
REACHING **346M**

SSA TO REMAIN FASTEST GROWING REGION

Socio-economic impact



High levels of mobile access compared to other basic services



Mobile already bringing enormous social and economic benefits to region



Potential in future to achieve much more with a supportive regulatory and policy environment

Mobile ecosystem contribution to GDP in SSA

2012
US\$60B

2020
US\$119B

80%
GDP
BY 2020



GDP US\$60B in 2012 growing to a forecast of US\$119B - 8% of GDP by 2020

Public Funding



2012



2020

US\$21B public funding contribution from MNOs including licence fees in 2012 growing to US\$42B by 2020

Employment

3.3M

Direct employment by the mobile ecosystem to grow to 6.6M by 2020

6.6M