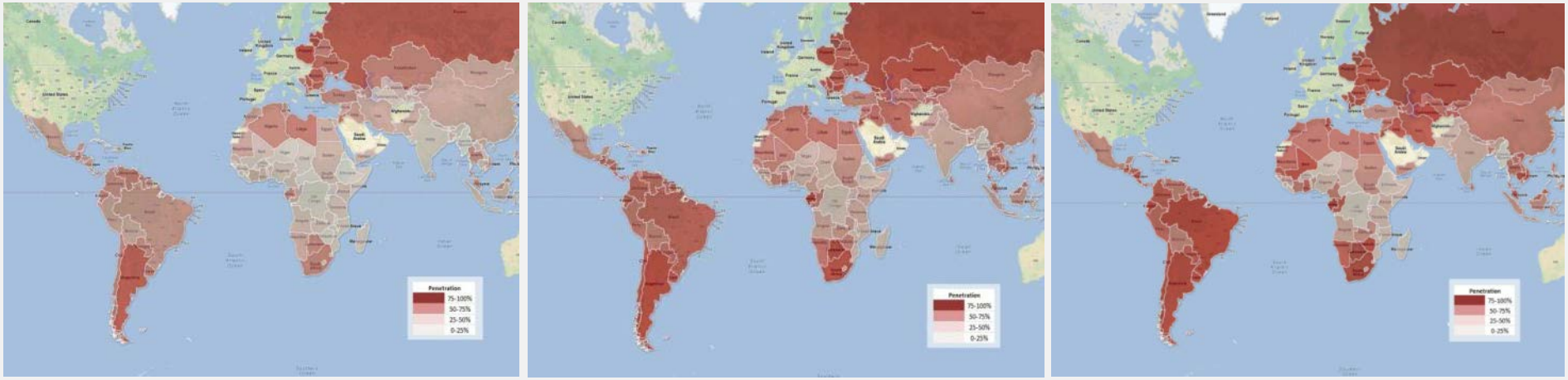
Mobile for Development Intelligence

mWomen Working Group Meeting

July 2013

Mobile penetration

2007 2012 2017



Note: penetration is of active mobile subscribers (e.g. those who subscribe to mobile services)
Source: GSMA Wireless Intelligence, GSMA-MDI Analysis

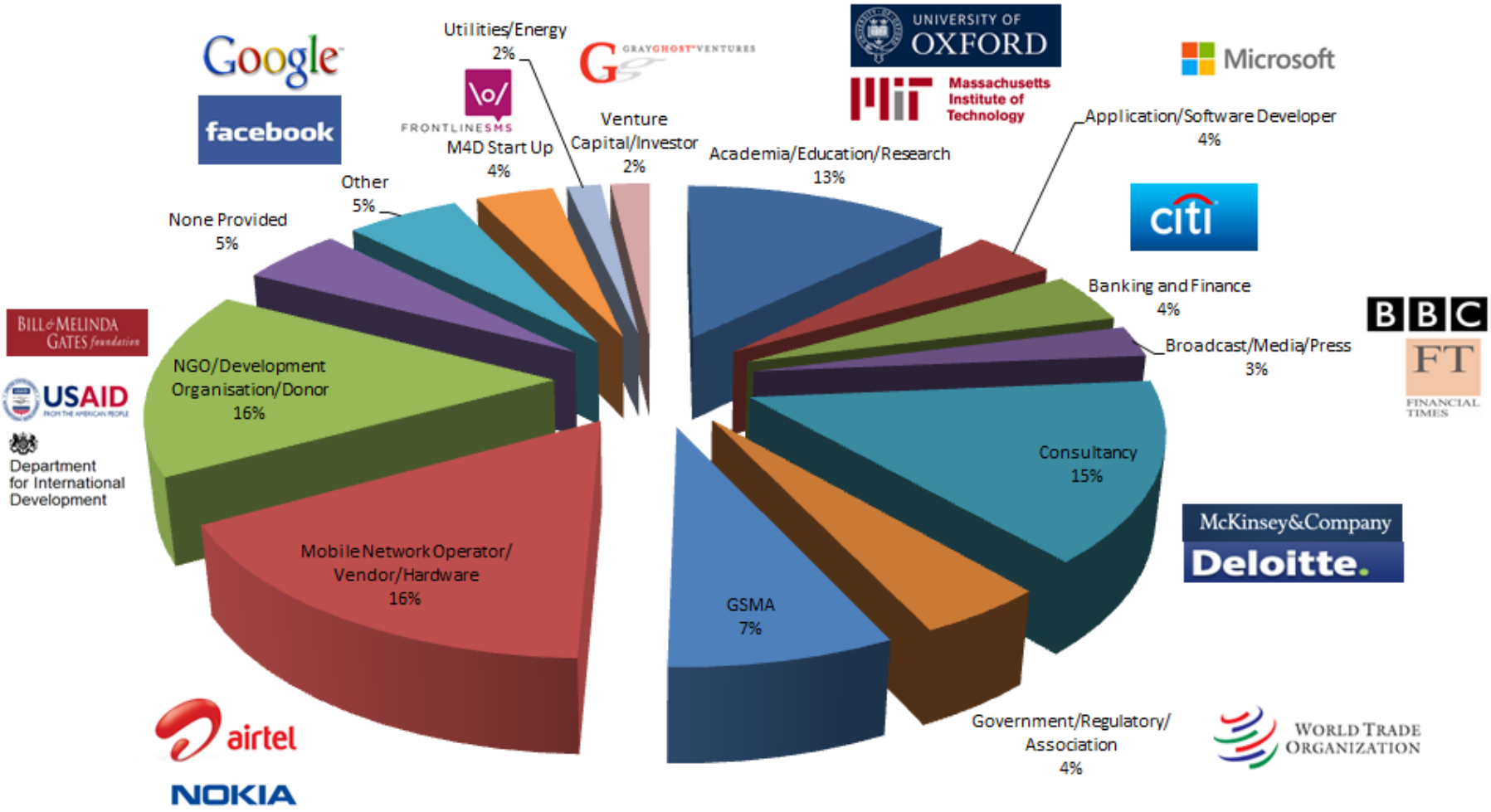
Mission

Educate *and* ***unite*** *those who want to harness the power of* ***mobile for good***

Drive investment and innovation in mobile products & services that offer value to underserved populations in the developing world

Mobile Operators	Vendors & Entrepreneurs	Investors	Development Organisations	Governments & Regulators	Academia
Support for internal business cases	Identify new business opportunities	Find investments	Improved project planning through access to best practice	Understand the scale and impact of mobile solutions	Improved data for research
Connect to a community	Understand market and sector trends	Evidence of the social and economic impact of mobile	Evidence of the social and economic impact of mobile	Ability to benchmark against different countries	Opportunity to publish research
Evidence of the social and economic impact of mobile	Market your product and service	Collaborate with other investors	Collaborate with other development organisations and mobile industry partners		
	Connect to investors				

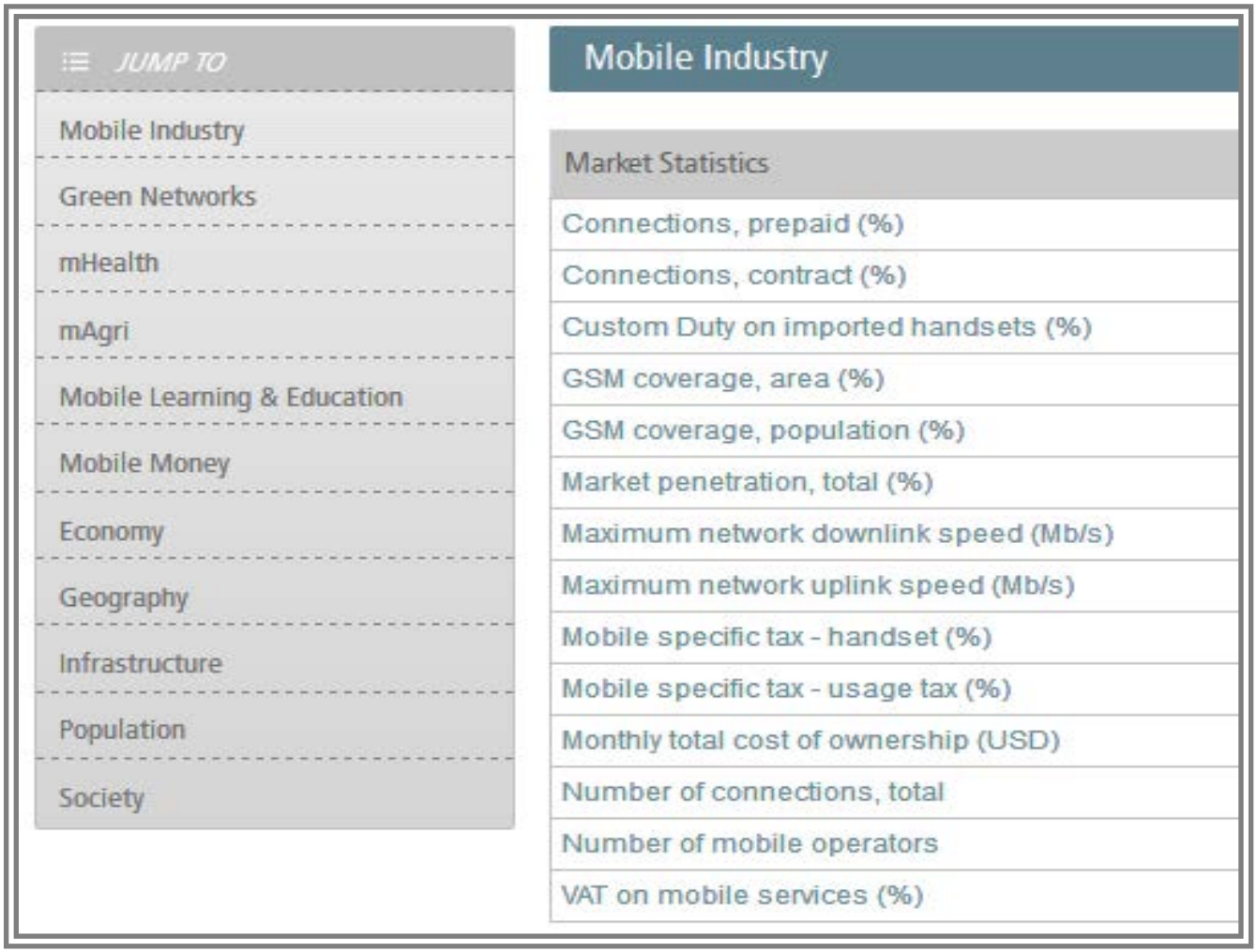
MDI registered users



Sector Overviews

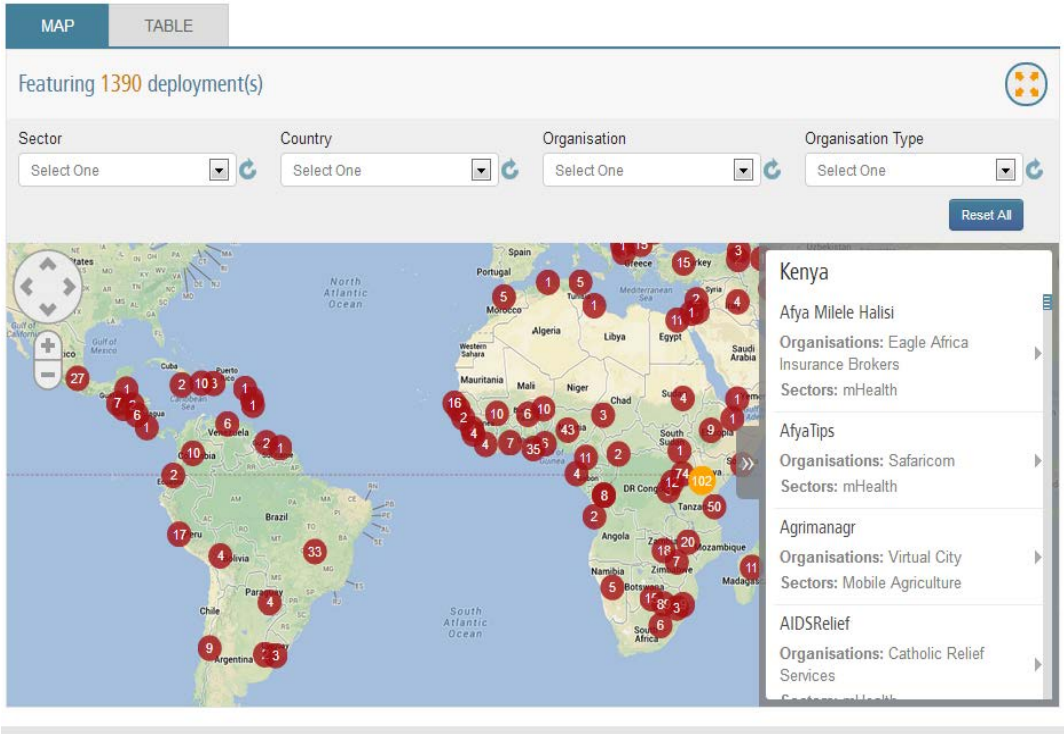


Industry Statistics



Site Highlights

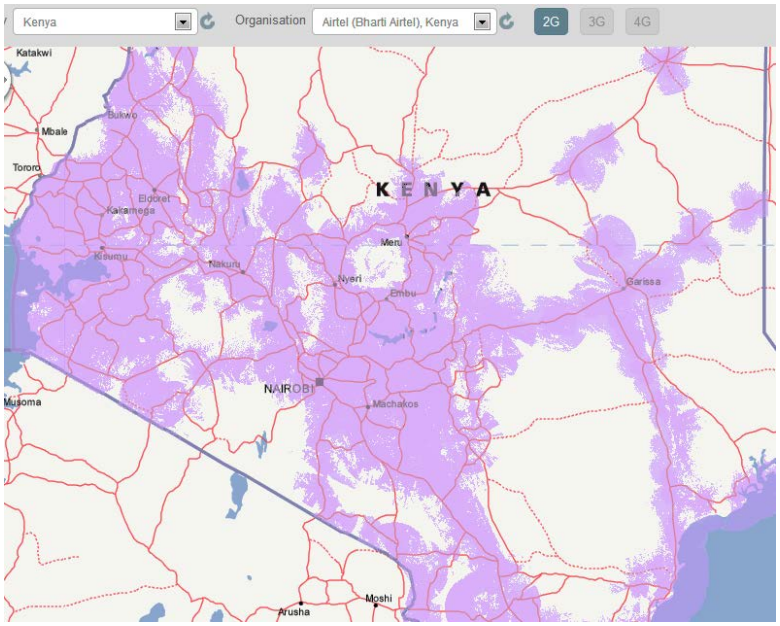
Products & Services: in map or table view…



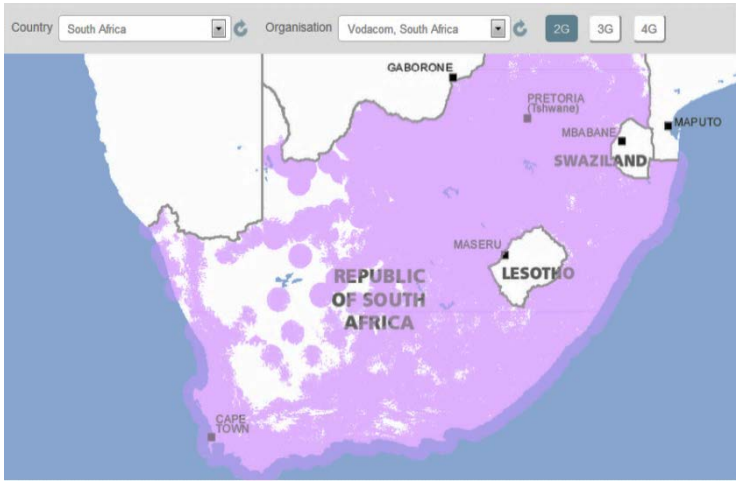
Iko Pesa	Orange (Telkom Kenya) - Kenya	Mobile Money
iPay	iPay - Kenya	Entrepreneurship and Work
Juhudi Kilimo	Juhudi Kilimo - Kenya	Mobile Agriculture
Kazi 560 (Mobile 4 Good)	OneWorld UK - United Kingdom	Entrepreneurship and Work
Kilimo Salama	Syngenta Foundation for Sustainable Agriculture - Switzerland	Mobile Agriculture
KimMNCHip	Safaricom - Kenya	mHealth
Life Skills	ympyra - Finland	Mobile Learning & Education
Lighting for School	Safaricom - Kenya	Energy Access
M-Afya Kiosk	Afya Research Africa - Kenya	mHealth
M-CHANJO	M-CHANJO - Kenya	mHealth
M-FARM	Mfarm Ltd - Kenya	Mobile Agriculture
M-Kilimo	KenCall - Kenya	Mobile Agriculture

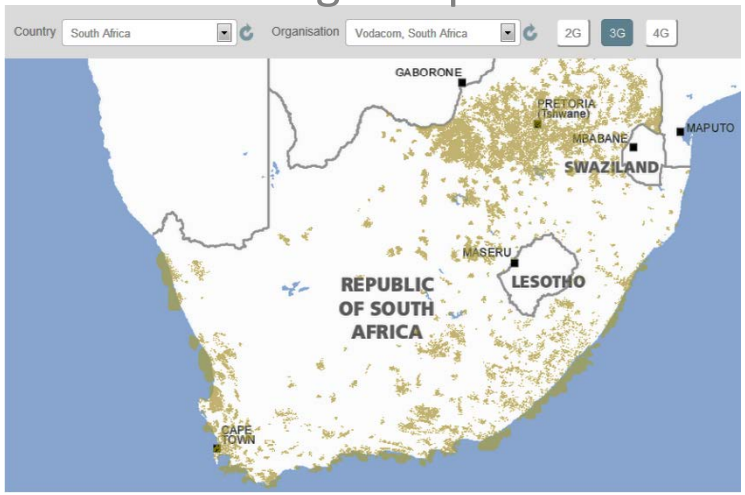
Network Coverage Maps

Airtel (Bharti Airtel), Kenya 2G coverage maps



Vodacom, South Africa 2G vs. 3G coverage maps





Impact Pathways (Mobile and Women, Mobile Money, & mHealth)

Development Outcomes and Impact - Women's economic advancement & power and decision-making

Short-term

Increased communication

(Sources : 18)

- Women more frequently communicate with friends and family
- Business networks/communications strengthened

Increased efficiency

(Sources : 12)

- Time/money saved in personal context
- Time/money saved in business context

Increased access to employment, market and business information

(Sources : 9)

- Women aware of business information, opportunities and strategies
- Women who are aware of job opportunities

Medium-term

Increased personal autonomy and mobility

(Sources : 11)

- Women more able to make independent decisions
- More women having the power to make financial decisions

Reduced personal autonomy and mobility

(Sources : 8)

- Invasion of women's privacy (e.g. monitoring phone conversations)
- Husbands prohibiting wives to own mobile phone

Increased opportunities for income generation

(Sources : 21)

Long-term

Increased economic expansion and financial capital accumulation

(Sources : 10)

- Improved performance of female- headed businesses
- Increased female income and savings
- Increased female asset ownership
- Risk resilience

Improved standard of living

(Sources : 9)

- Women feeling their lifestyle has improved
- Improved household standard of living
- Lower crime rates against women

Improved social fabric

(Sources : 3)

- Stronger community networks/bonds

MDI Analysis section

Building and Branding

Current Content

- **Scaling Mobile for Development: A developing world opportunity**
- Targeting 100M mobile users across the Congolese and Sudanese markets
- Digital empowerment in the developing world
- **Mobile for Development: A diverse stakeholder mix**
- M4D Highlights at MWC 2013
- New Phones at MWC 2013: The M4D Perspective
- Thinking horizontally and vertically about mobile innovation

Thought Leadership

Case Studies

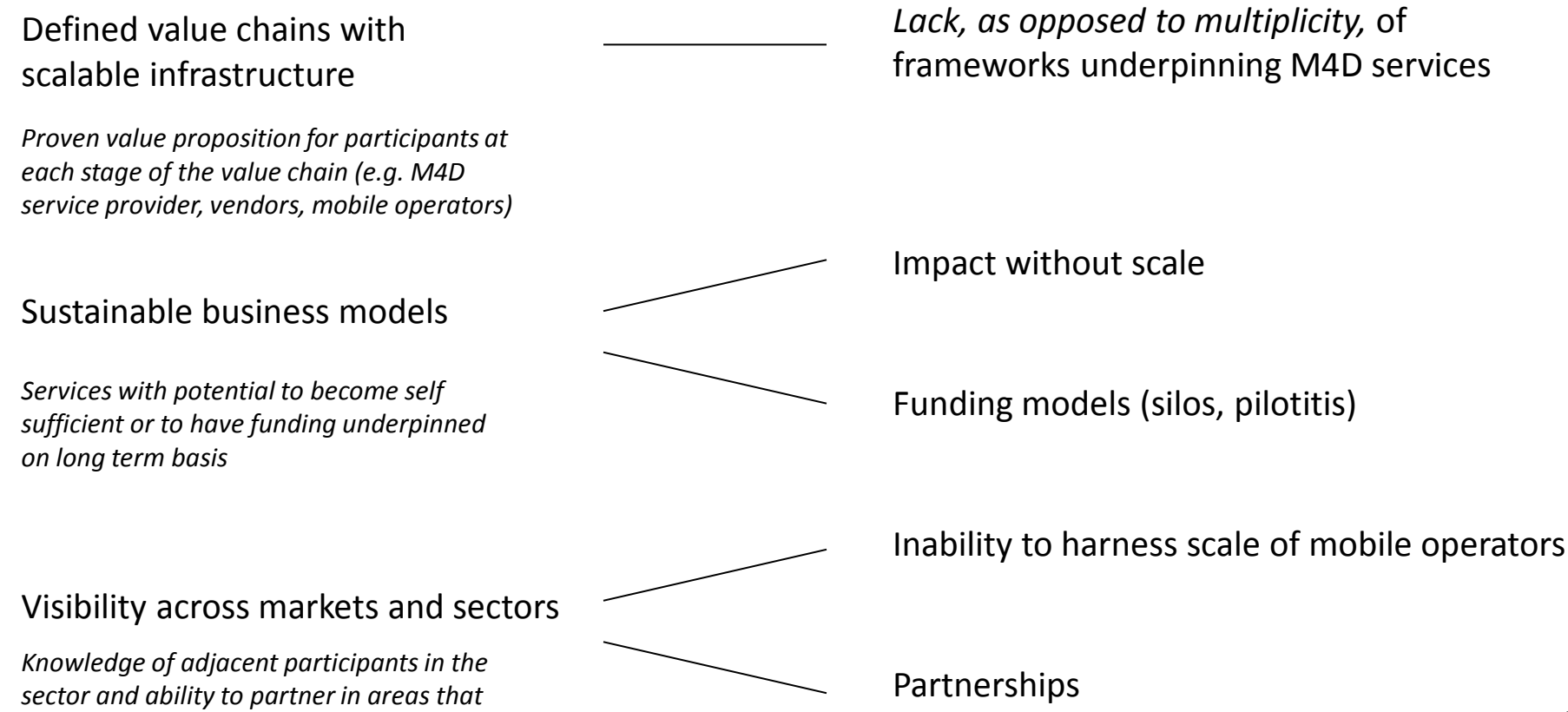
- MDI Case Study - bKash
- MDI Case Study - Souktel
- MDI Case Study - Tiendatek
- MDI Case Study - Urban Planet Mobile

Coming Soon

- Innovative Investment models
- Local content creation
- Sri Lanka country overview
- The Value of Voice
- Profitable Partnerships
- More case studies

Barriers to scale in M4D

- We show below key barriers to scale in M4D
- These will be felt more by some sectors than others

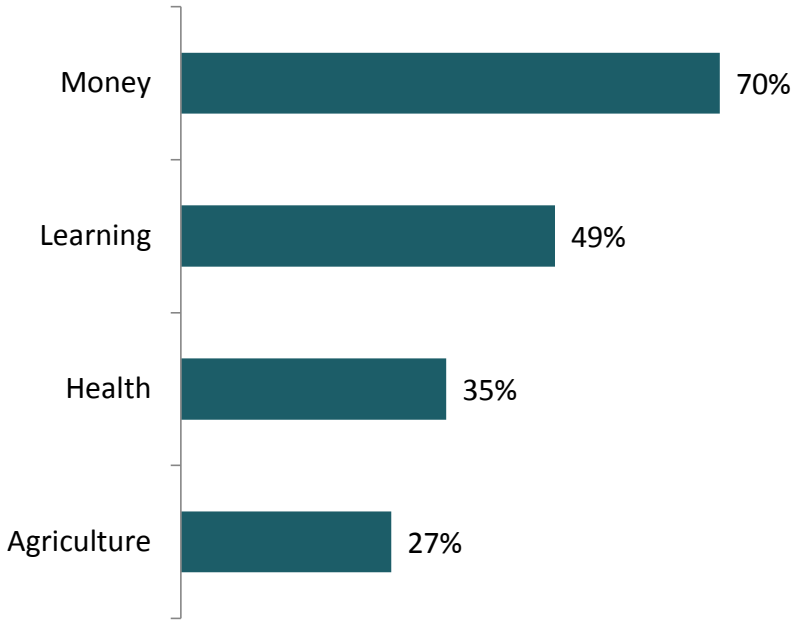


Source: GSMA-MDI Analysis

Visibility: forming partnerships

- Important for M4D organisations to form range of partnerships (e.g. MNO, vendor, content)
- Mobile operators are key partners both for connectivity and reach to the end user
- MNO-led M4D services appear most common in sectors with more of a proven value proposition
- There is an opportunity in other sectors to develop this
- Discussions with stakeholders suggest it is key to understand motivations – e.g. balancing the need for a return with the goal of social impact

M4D services led by MNOs



"It's not a sector [mAgriculture] that's represented real value to them [MNOs] in the past. You need to approach them in such a way as meets their business objectives"
– Mark Davies, CEO, Esoko

"Very quickly we realised that positioning the product straight up as a business benefit made better sense. Until now we haven't been proven wrong on this"
– Bhanu Potta, Nokia Life Tools

Source: GSMA-MDI Analysis

www.mobiledevelopmentintelligence.com