GSMA mWoman: Myanmar Opportunities

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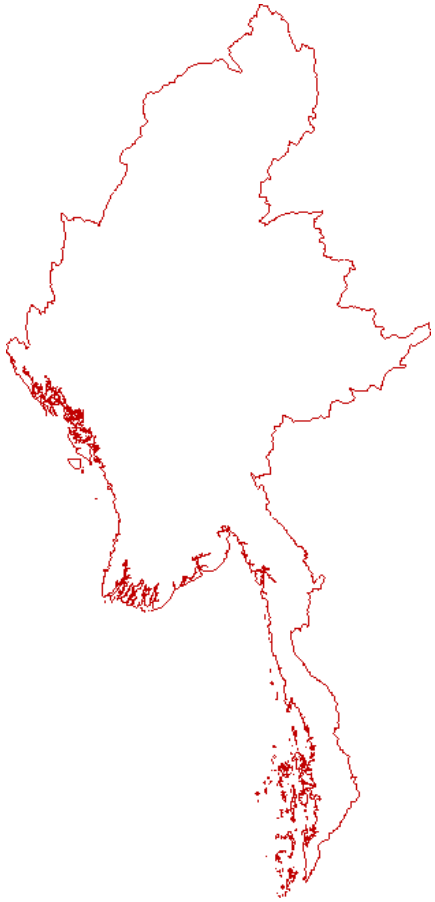
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18 November 2013


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Agenda

- The Myanmar Mobile Market
- Ooredoo – an introduction
- Myanmar context for mWoman
- Ooredoo Plans
- Barriers and risks



The Myanmar Mobile Market

A proud, culturally rich and established nation



A large potential for Mobile Market

- Myanmar is a large country, with about 61 million people,
  - The **25th largest population** in the world
- A large country spread over 653,508 sq km
  - The **40th biggest country** in the world
- An economy with a good momentum: 6.3% GDP growth in 2012
  - 3% higher than the global figure of 3.3%
- Mobile penetration stands at 7% and Internet services is slightly above 1%.
  - Below world penetration rate of 96%

Source: Asian Development Bank, World Bank, CIA Factbook,, ITU 2013

Who is Ooredoo Myanmar?

- Ooredoo is a leading international communications company, spanning from North Africa, Middle East, to Southeast Asia.
- Our vision is based on a strong belief that we can help enrich people's lives and stimulate human growth.
- License still pending but launch expected mid 2014
- 3G only bid



Ooredoo is innovating

3G only – nationwide

Internet Smartphones

Affordable Clear voice



Health issues



- Infant Mortality 48/1000, equal with Bangladesh
- Maternal Mortality 200/100,000, just behind Indonesia
- Life expectancy = 65 (Bangladesh 70, Indonesia 72)
- 37% births in rural areas with no skilled attendant
- 64% of births at home
- 33% babies underweight amongst poor (24% national)

Cultural and religious discrimination



- 90% Therevada Buddhism – some inherent imbalances
- Strong Cultural tradition / superstitions in relation to woman vs men
- Awareness of issues / discrimination a serious issue
- Over 140,000 muslim displaced over last 2 years through violence (4% muslim)

Financial barriers



- Very limited banking system
- GDP = $1300 (estimate, population unknown)
- National ID system incomplete (estimated 35m ID's in place)
- Some population stateless eg Rohingya Muslims
- Culturally wife usually handles family finances but not authority
- Financial and technical literacy issues

Education



- 90+% of teachers are female even in technical faculties
- Female imbalance in academia not reflected in industry
- In past entry scores for professional degrees favored men by up to 10% due to quotas
- Cultural favor to male education, yet males in rural areas more likely to not complete high school

Law and Violence

“Rape is used in my country as a weapon against those who only want to live in peace, who only want to assert their basic human rights, especially in areas of ethnic nationalities. Rape is rife. It is used as a weapon by the armed forces to intimidate the ethnic nationalities and divide our country.” Aung San Suu Kyi

- Myanmar has ratified CEDAW however inconsistencies to national law. No imposed gender inequality in law, but no protection
- Rape used by the military – constitutionally protected from prosecution
- Rape often referred to as the trigger for racial violence
- Less than 5% politicians are female
- Woman have low representation in corporate and industry (Woman outnumber men in population around 3 to 5%)

Technology barriers

Plan ahead for localisation

- Currently phones need to have separate installation of Myanmar Language after purchasing – side-loading
- Two version of Myanmar language unicode are emerging.
- It is important for the mass uptake of mobile services to support Myanmar language.

A Myanmar keyboard



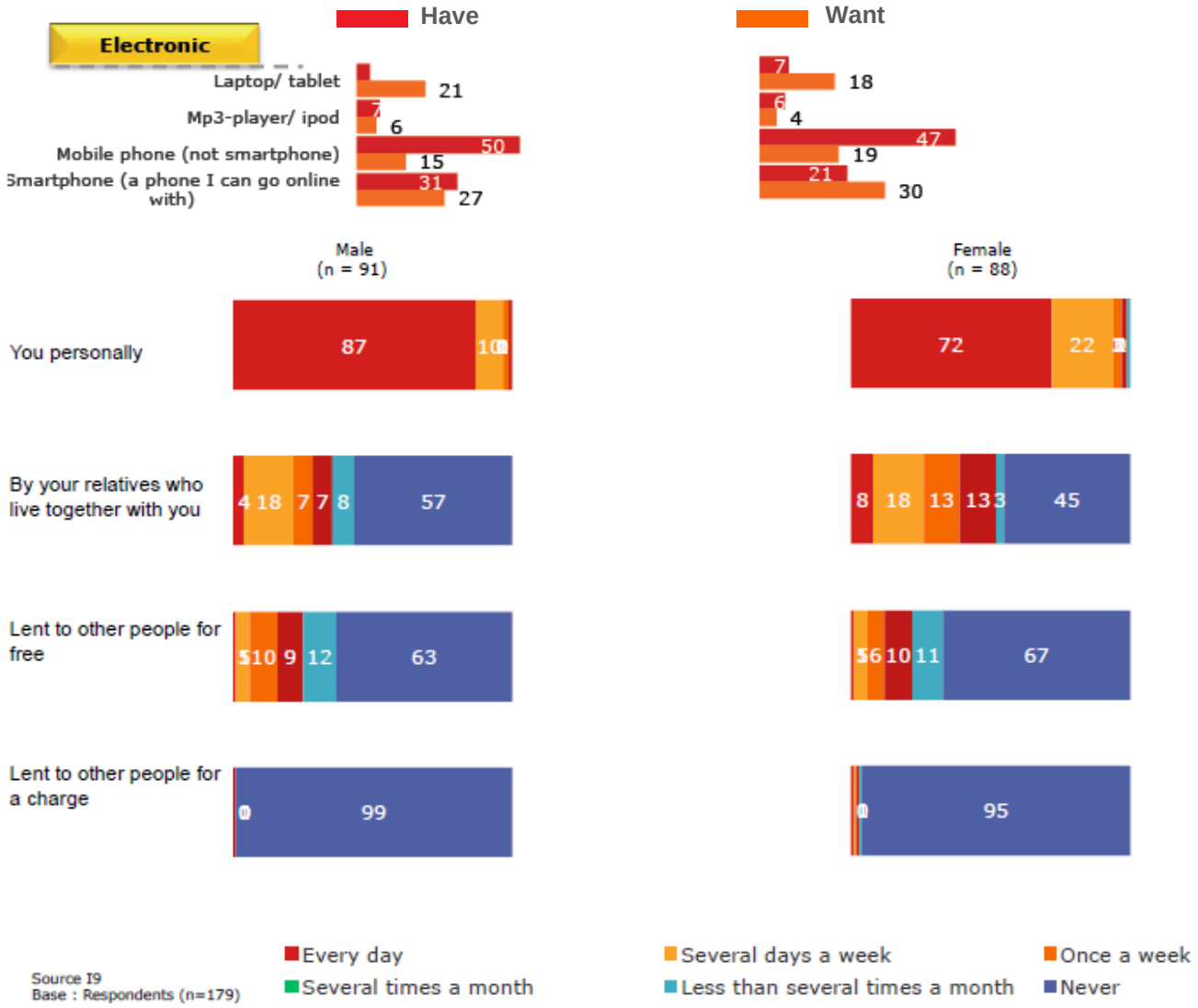
Summary



GSMA Indicators for mWoman Focus

Driver	Challenge	Issue
Gender gap in ownership	Global paradigm in emerging markets	Likely
Cost of ownership	Income inequality	Yes
Limited understanding of benefits	Not clear on benefits of ownership, social norms to overcome	Yes
Cultural barriers	Traditional barriers for woman ownership	Yes
Technical literacy	Lower literacy reduces demand	Yes
Access to charging	70% of homes without grid power	Yes

Current State – Basic Insights



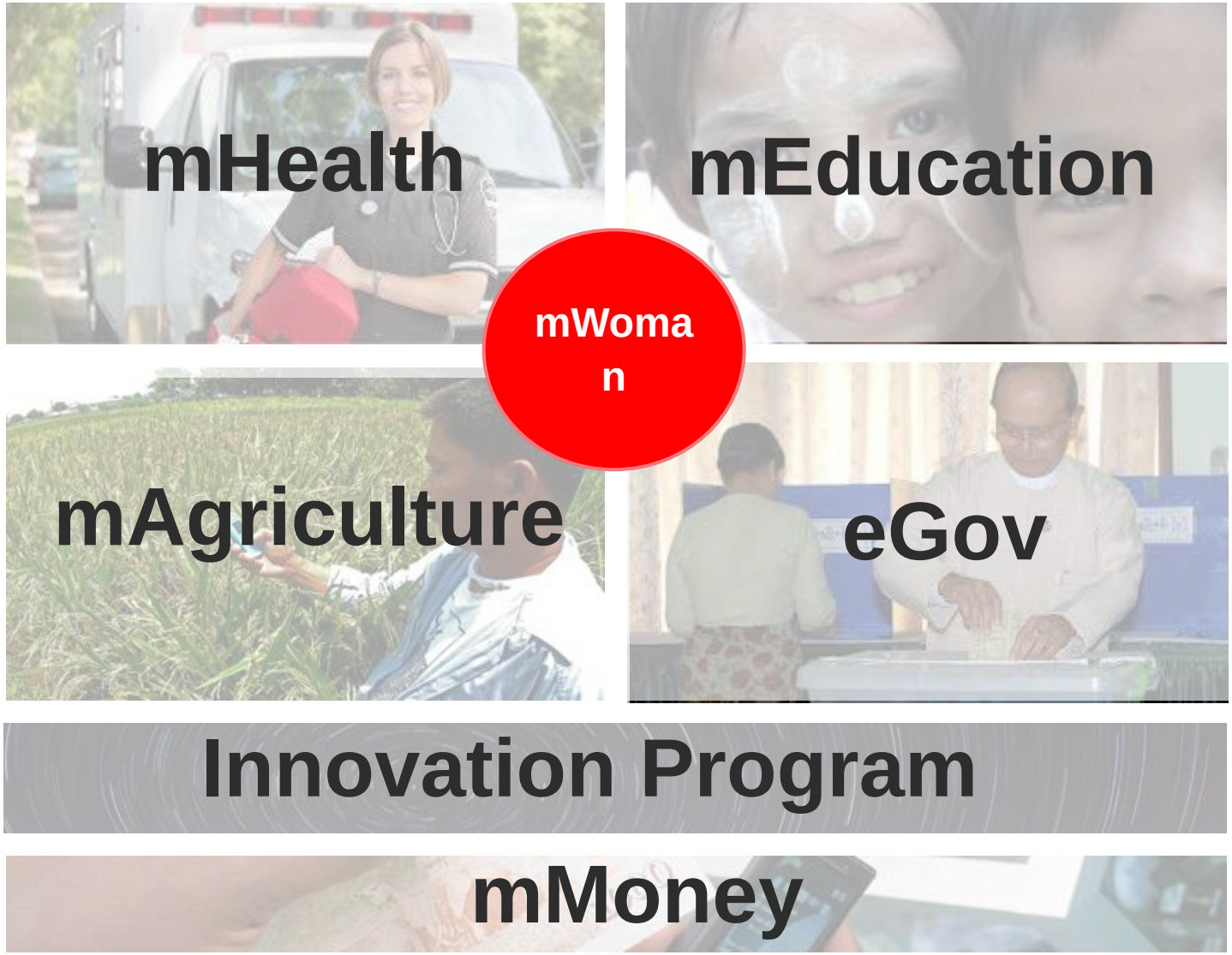
Source I9
Base : Respondents (n=179)

Woman more likely

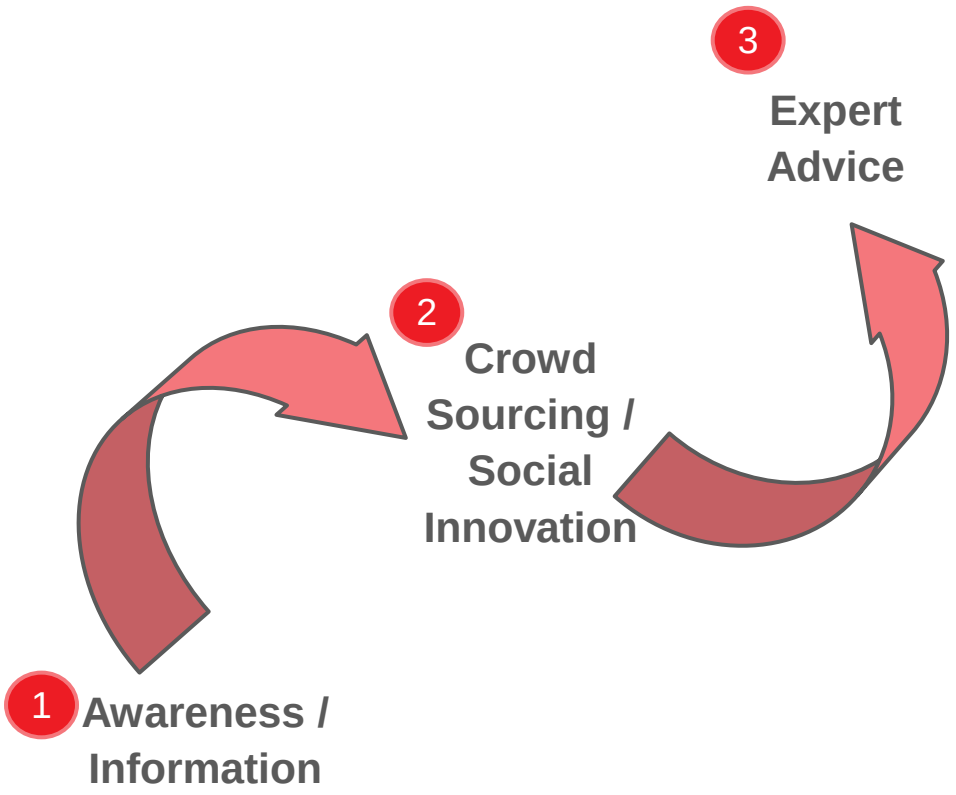
- to own basic / feature phone
- to share phone with family
- To charge other people for using there phone

Note survey of Urban

Digital Services Portfolio



Ooredoo Myanmar Addressing Woman's Needs



Digital Services Portfolio Structure

- Expectant and new mothers digital health services
- Digital family health care
- Financial literacy
- Small business and entrepreneurship
- English language
- Teacher training
- Innovation theme

How do we make sustainable?



- **SCALE….**
- Distribution network
- Project priority
  - Digitizing existing process / program
  - Cut and Paste
  - Development

Ooredoo Myanmar Empowering Woman in business



- 30,000 woman in distribution franchise
  - Partnered with Cherie Blair Foundation
  - Builds on successful Indosat implementations
  - Currently identifying NGO partners for execution
  - Integration with Telecentre commitment
  - Challenges:
    - Finding NGO to address all market
    - Training inc verification of training

Barriers and Risks to Service Launch



- Awareness of network availability and potential of services
- Ministry approval of messaging / services
- Priorities / resource availability
- Technology partner availability / availability of relevant digital content
- Partnership issues related to social / political issues

Next steps



- Financial needs / demands and literacy research – Jan 14
- Segmentation and general market research – Dec 13
- Launch portfolio – Dec 13
- Core partner network – Dec 13

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