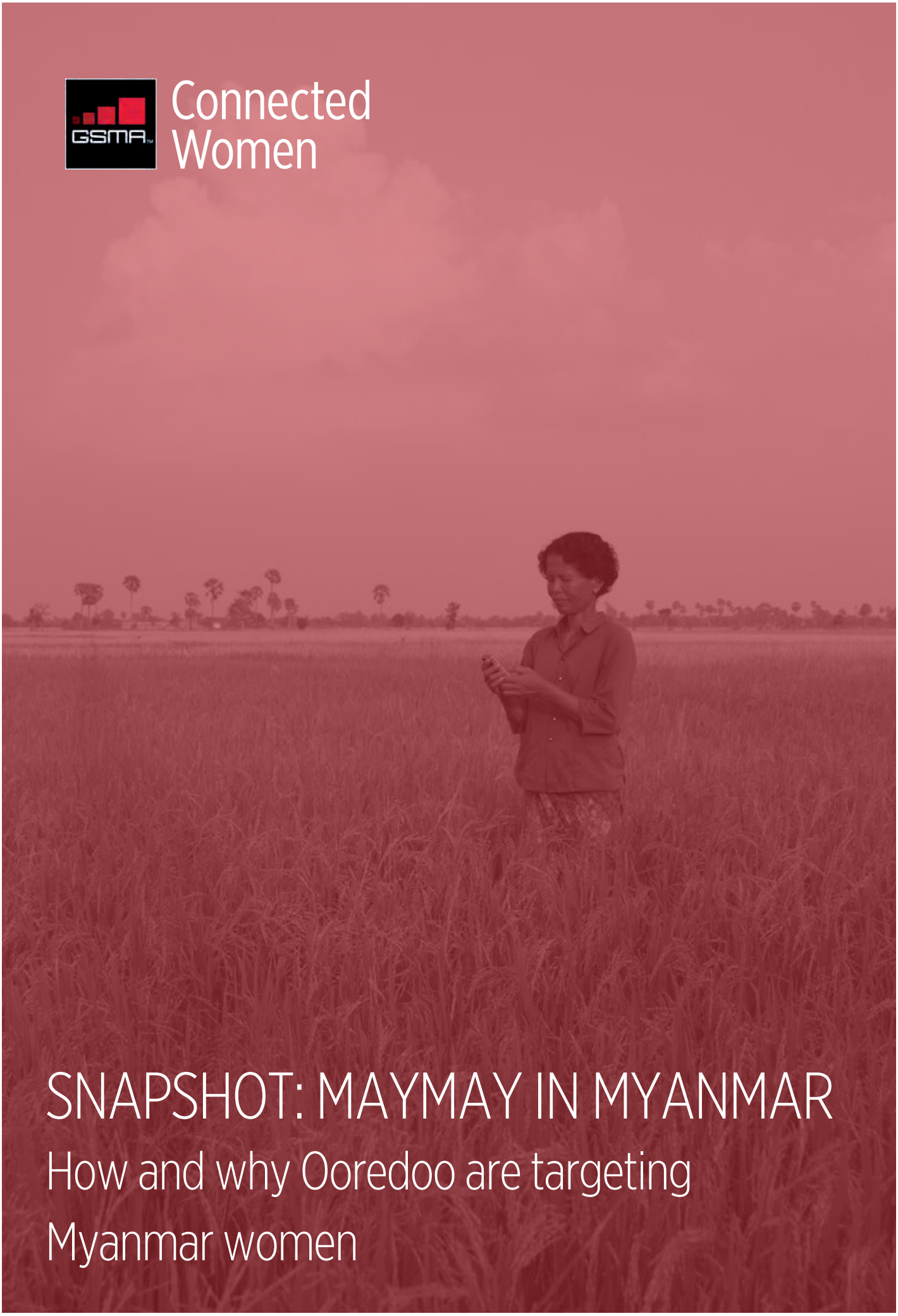
Connected Women



SNAPSHOT: MAYMAY IN MYANMAR

How and why Ooredoo are targeting Myanmar women

This year Ooredoo is going head to head with Telenor in a race for customers in Myanmar, one of the last untapped mobile markets. In a country where 9 out of 10 people have never owned a mobile phone, Ooredoo's strategy is to 'leapfrog' traditional mobile usage by launching a 3G-only network. In this document we highlight how and why Ooredoo Myanmar hopes to capture the female segment

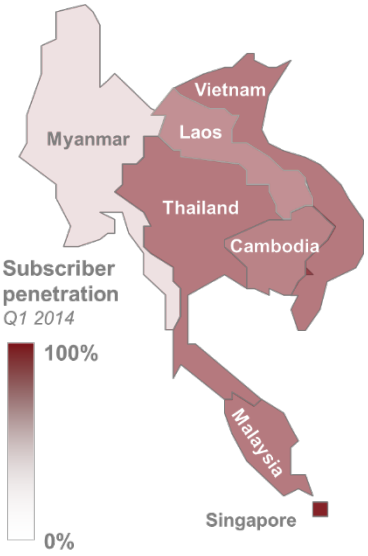
In 2013 Myanmar granted licenses to two MNOs, Telenor and Ooredoo, to provide the first non-state-controlled mobile networks in the country. The launch of these two networks will transform the market with greatly improved coverage and a significant reduction in the cost of usage. By March 2016 it is expected that mobile penetration will increase from 11% to 80% meaning around 35 million people in Myanmar will subscribe to mobile services for the first time.[1]

Ooredoo's strategy is to launch a 3G-only network and 'leapfrog' traditional 2G mobile usage. However, the success of this strategy hinges on consumers seeing the value of a smartphone and mobile data over cheaper feature phones and basic 2G services. Challenges to this include the low understanding among consumers, particularly women, of the benefits of smartphones and a lack of mobile content relevant to the Myanmar context. Ooredoo saw a commercial opportunity to develop a high profile smartphone app, tailored to Myanmar women, to raise awareness of the benefits of a smartphone and thus drive female 3G subscribers.

Growing mobile data penetration among low-income populations is a challenge for mobile operators (MNOs) across the developing world. However, the poor access to basic services within this segment presents a clear opportunity for advanced mobile services such as mHealth to fill that gap. In this document we outline how and why Ooredoo, supported by a GSMA mWomen Innovation Fund Grant, is using advanced mobile services to drive 3G uptake among women in Myanmar.

[1] GSMA Intelligence: Foreign operators seek to unlock Burmese potential, September 2013

Myanmar: A mobile greenfield



In September 2013 mobile subscriber penetration in Myanmar was estimated at 11%, one of the lowest in the world. Mobile communications were provided by two state-controlled operators and a lack of investment and competition meant that coverage was poor and usage very expensive: in 2013 the cost of a SIM averaged $200 USD[2].

As part of its wide-ranging reforms, the Myanmar government decided to grant network licenses to international operators for the first time. By opening its doors to foreign investors, the government hopes to boost investment in network infrastructure, increase competition and thus significantly improve mobile access for the population of Myanmar. It is estimated that the growth in the mobile market will add 7% to GDP[3].

With a population of over 50 million and a subscriber penetration of just 11%, the commercial opportunity for operators was clear. Over 90 bids were received in what was one of the most competitive licensing rounds in history. The successful bidders were Ooredoo and Telenor with additional licenses expected to be granted in the coming years[4].

Ooredoo and Telenor are launching their networks in 2014, starting in the main cities and expanding into rural areas. The government's target is to reach 75-80% subscriber penetration by March 2016, bringing Myanmar in line with its Southeast Asian neighbours in just two years[5]. Ooredoo's network went live in August 2014.

Challenges of launching in Myanmar

In many respects Myanmar is a unique case. Years of military rule has deprived the country of basic infrastructure with less than 30% of the population having access to electricity, a poor road network and almost non-existent telecommunications infrastructure. From the base stations to the distribution network, Telenor and Ooredoo must build mobile communications in Myanmar from scratch.

Whilst launching a network in Myanmar has its own unique challenges, many of the challenges faced by both Telenor and Ooredoo are common to operators across the developing world. Ooredoo in particular is seeking to drive the uptake of mobile data services among consumers – they are launching a 3G-only network in an effort to 'leapfrog'

[2] GSMA Intelligence: Foreign operators seek to unlock Burmese potential, September 2013

[3] Mobile World Live: Myanmar ready to leap into 3G era, August 2014

[4] GSMA Intelligence: Foreign operators seek to unlock Burmese potential, September 2013

[5] GSMA Intelligence: Foreign operators seek to unlock Burmese potential, September 2013

traditional 2G mobile usage and get Myanmar using advanced services more quickly than in other markets. However, there are two distinct challenges to encouraging Myanmar consumers to subscribe to 3G services.

1. **Low awareness of the mobile internet:** Most of the population will have never owned or even seen a smartphone handset and will have almost no understanding of how or why to use one. Ooredoo must therefore invest in educating consumers around the benefits of mobile data if they are to convince consumers to opt for a smartphone and 3G subscription over a basic feature phone.
2. **Lack of local content:** The low penetration of Internet services in the country means there are very few websites written in Myanmar language or with content specific for Myanmar consumers, severely limiting the value of mobile data services for the Myanmar population. The historically poor access to technology in the country also means there are very few local developers to generate this content. In order for Myanmar consumers to see the value of mobile data, Ooredoo and Telenor must therefore support in efforts to generate high quality local content that meets the specific needs of the Myanmar population.

The low awareness of the mobile Internet and a lack of local content are issues that affect the entirety of the Myanmar population. However, research by Ooredoo has shown that these barriers may disproportionately affect the female population. Focus group studies with men and women living in both urban and rural areas highlighted a gender gap in ownership and usage of mobile. Research suggests that prior to the launch of the new networks, men were more likely to own a phone, particularly a smartphone, than women. Even among the few women who did own a smartphone, women tended to use their phone in a less sophisticated way than men. While men could cite multiple apps and websites, women typically used just Facebook.

Opportunities in Myanmar



Whilst there are significant challenges to overcome in launching a network in Myanmar, the poor access to basic services creates an opportunity for advanced mobile services such as mobile money, mHealth and mAgri to fill that gap. In a country with such limited access to healthcare, banking and information, the value of a smartphone is therefore potentially even greater than in more developed markets.

A consumer insights study commissioned by Ooredoo found that personal and family health represents the biggest concern for the Myanmar population. Maternal health is a particular problem in the country as Myanmar has one of the worst maternal mortality rates in the region. 200 women die for every 100,000 live births[6], driven by poor access to healthcare and health information, particularly in rural and remote areas. For many women their primary source of maternal health information is friends and family, leading to

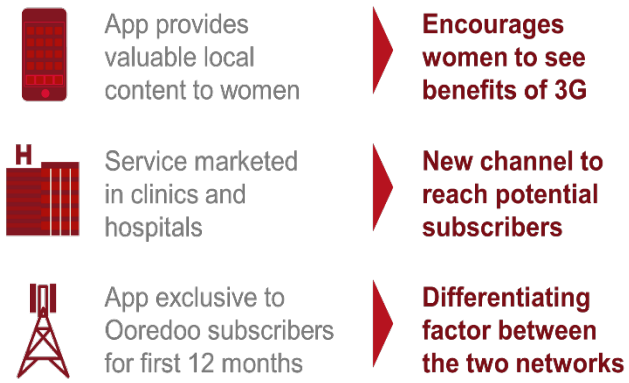
[6] Databank Myanmar, World Bank, 2012

numerous, and sometimes dangerous, myths around pregnancy and childbirth.

Research commissioned by Ooredoo in June 2014 showed that women in both urban and rural areas were dissatisfied with the quality and amount of maternal health information available to them. In fact, in a focus group with urban smartphone owning women, some even said that they were scanning Facebook pages for health content as they did not know where else to find information in Myanmar language.

Commercial opportunities for Ooredoo

In light of these findings, Ooredoo saw a commercial opportunity to develop and launch a maternal health information app for Ooredoo Myanmar subscribers. By providing local, quality content with clear value to women, the app would serve to encourage women to see the benefits of a 3G subscription and would help to differentiate the network. In addition, by advertising the service in health clinics and hospitals, the app would also provide a new channel through which to reach potential subscribers.



App partnership

As well as receiving funding and advisory support from GSMA Connected Women, Ooredoo engaged two partners on the project: health NGO Population Services International (PSI) and technology start-up Koe Koe Tech. The Ministry of Health also supported in ratifying the maternal health content for the Myanmar context. The figure below outlines the structure of the partnership.



maymay – Myanmar's first maternal health smartphone app

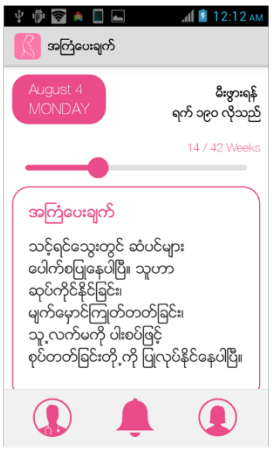
Named maymay, meaning 'mother' in Myanmar language, the app is designed to provide maternal health information to pregnant women. This health content is based on the MAMA maternal health content but translated to the Myanmar language and adapted to the local context. The service also aims to improve women's access to health professionals by allowing users to access a database of information on the location and contact details of health workers and clinics.

The service has three main features:

- **Maternal health advice notifications:** Users of the app receive 3 maternal health advice alerts per week, tailored to the stage of the user's pregnancy. The user receives the first section of the advice message as a push notification and is then encouraged to click on the notification to open the app and read the rest of the message.
- **Doctor locator service:** The app uses the user's GPS location and a database of Myanmar health professionals to provide users with information on their nearest health worker. The app uses Google Maps to show the user the location of their nearest health workers and clinics, and they can then select the pins to see information on the health worker's location, specialty and contact details.
- **User profile:** Users of the app are required to enter details of their last menstrual period or expected due date in order for the notifications to be timed with the stage of their pregnancy. Messages are also adapted for whether or not this is the user's first pregnancy, and the user can switch notifications on and off at any time.



Input stage of pregnancy, switch notifications on/off



Receive regular health notifications



View location of local health workers



Contact a local health worker

Designing for non-users

One of the key success factors in developing and launching this service will be building a simple and intuitive user experience. Whilst literacy rates amongst women in Myanmar are high at 90%[7], the research showed that women in Myanmar are even less likely than men to have used a smartphone or computer, and so technical literacy rates are very low. In order for Myanmar women to be able to successfully download, register for, and use the service it is essential that the app has a highly user-centric design.

The challenge in developing this service was to balance the number of app features with the number of steps in the user journey. The more steps there were, the more likely it was that users would drop off along the way. However, if there were fewer features, it was likely that it would hold less value for users. To find this balance, the app underwent a period of user testing with smartphone owners and non-smartphone owners to refine the user experience. Improvements to the user experience include:

- Simplifying the registration process by minimizing the amount of information required. The registration process now requires just two pieces of information: the users' mobile number and the users' expected due date
- Adding a tutorial feature to help users navigate the service
- Refining the logo and branding
- Adding a social media component to allow users to share pregnancy photos and posts on Facebook

The usability of the app will be tracked in multiple ways including through back-end data, an in-app user survey, focus groups and face-to-face surveys. The will allow the app to be continuously monitored, tested and refined to ensure a high quality user experience.

Distribution & marketing

It is hoped that maymay will be a best-practice example of the benefits of a smartphone and 3G subscription, particularly for women. For this reason Ooredoo is taking a multi-channel approach to the distribution and marketing of the app. Ooredoo hopes to reach the target segment by promoting the app in specialist clinics, private hospitals and in health magazines. In order to reach lower income rural women the app will also be promoted through NGO PSI's network of Sun doctors who provide maternal health services in villages and townships across Myanmar.

Ooredoo are working with the Cherie Blair Foundation for Women to develop a network of female agents. As well as selling airtime, these agents will act to promote the maymay app and the benefits of a smartphone for women. Finally, above the line (ATL) marketing and social media will be used to promote the service. Facebook has already proven to be a successful channel for raising awareness of the service with the maymay page receiving over 15,000 likes before launch.

[7] World Bank

Coming soon…

The GSMA Connected Women programme aims to provide the industry with proven business models for reaching resource-poor women with mobile offerings and best practice recommendations for developing and launching these offerings. The GSMA Connected Women programme will work with Ooredoo and their partners to:

- Assess the commercial impact of the app for Ooredoo and their partners
- Assess the social impact of the service for Myanmar women

Provide recommendations and lessons learnt in developing and refining the app user experience. For more information please contact the GSMA Connected Women team at: connectedwomen@gsma.com

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 with 250 companies in the broader mobile ecosystem, including handset and device makers, software companies, equipment providers and Internet companies, as well as organisations in industry sectors such as financial services, healthcare, media, transport and utilities. The GSMA also produces industry-leading events such as Mobile World Congress and Mobile Asia Expo.

For more information, please visit the GSMA corporate website at www.gsma.com.
Follow the GSMA on Twitter: @GSMA.

About Mobile for Development - Serving the underserved through mobile

Mobile for Development brings together our mobile operator members, the wider mobile industry and the development community to drive commercial mobile services for underserved people in emerging markets. We identify opportunities for social and economic impact and stimulate the development of scalable, life-enhancing mobile services.

For more information, please visit the GSMA M4D website at: www.gsma.com/mobilefordevelopment
Follow GSMA M4D on Twitter: @GSMAm4d

About the GSMA Connected Women Programme

GSMA Connected Women accelerates growth of the female digital economy, by working with partners to bring significant socio-economic benefits to women consumers and employees. The programme is focused on increasing women's access to and use of mobile phones and life-enhancing mobile services in developing markets, as well as closing the digital skills gender gap, attracting and retaining female talent, and encouraging female leadership in technology on a global basis.

Visit www.gsma.com/connectedwomen to learn more and to participate.
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The GSMA Connected Women Global Development Alliance is a programme in partnership with: