

The background of the slide is a photograph of a woman in a white hat and blue shirt, blurred as if moving through a market stall. Behind her is a large wall densely packed with hundreds of various mobile phones, creating a mosaic effect. A red banner is overlaid at the bottom of the image.

MOBILE OPERATORS IN A 2.0 WORLD

MICHAEL O'HARA: CHIEF MARKETING OFFICER

The GSMA



- Represents the interests of the worldwide mobile communications industry
 - Nearly 800 mobile operators
 - Over 200 associate members
 - Across 219 countries
 - 4 billion wireless connections
- Remit is to innovate, incubate & deliver new opportunities for our members, with the goal of driving the growth of the mobile communications industry

CONNECTING THE WORLD!

Connecting the World!



Fixed



1.1 Billion Lines

Mobile



4 Billion Connections

Mobile networks will connect the world...

MOBILE BROADBAND WILL CONNECT THE WORLD TO THE INTERNET

Why I love the Internet!



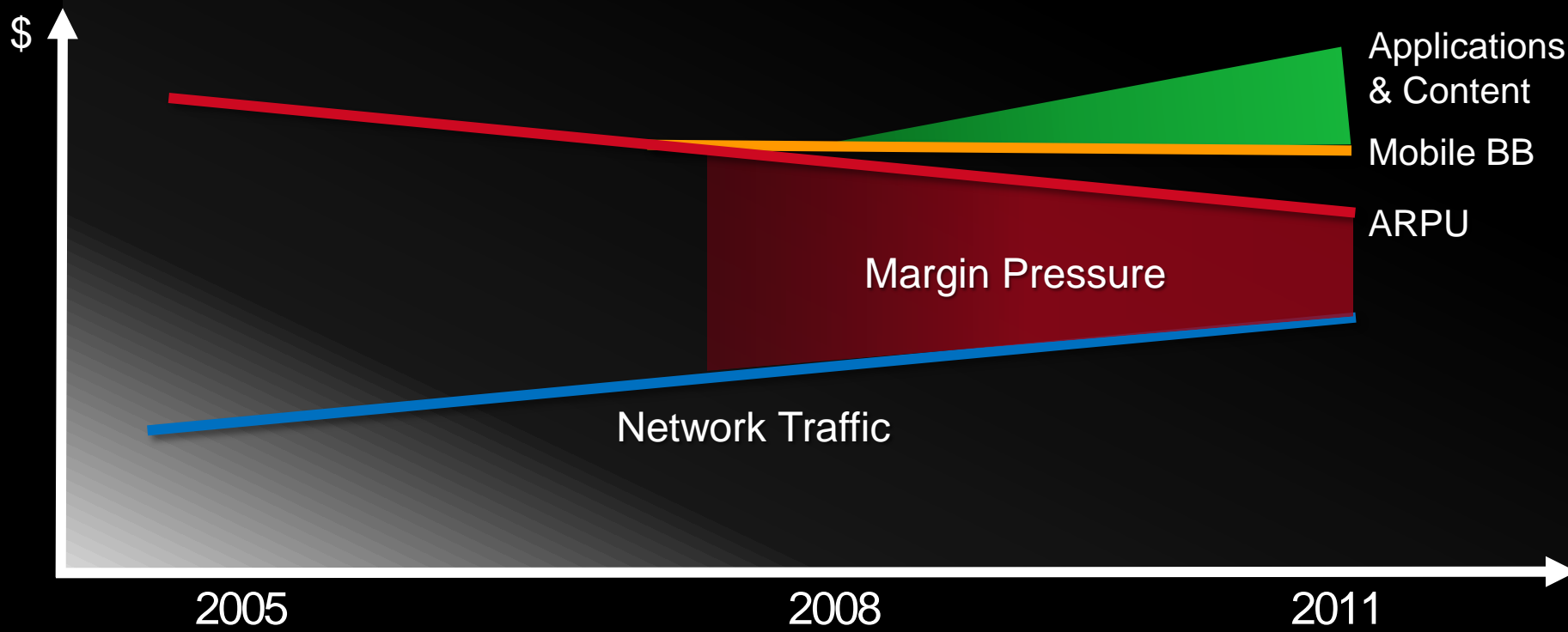
Anything is possible!



- Video shot in sister's spare room...
- Posted on OK GO's website: *Nothing much happened*
- Posted on YouTube by fans: *Started to get views*
- Recommended on Facebook: *Close to 50 millions views*
- Led to iTunes downloads, a Grammy award and a sell-out concert tour...

BUT THIS MODEL PRESENTS A CHALLENGE

The challenge...



OPERATORS NEED TO GET A SHARE OF THE APPLICATIONS MARKET!

Mobile Internet struggled...until Apple



Consumer Vertical

Developers:

- Strong developer community
- Simple revenue share business model

Applications Store:

- Widely adopted iTunes as base for applications store
- Established financial settlement capabilities

Device:

- Apple brand with strong consumer following
- Game changing touch screen
- Complete range of device APIs
- One form factor to simplify application development

A COMPELLING PROPOSITION FOR CONSUMERS, DEVELOPERS & APPLE

Now we have the imitators...

			
			
			
Consumer Vertical	Business Vertical	Open Source	Mass Market

- We are creating islands of applications...
- We are focusing on 'over the top' solutions that ignore the assets of the network...
- We are missing the very thing that made GSM what it is today...
- We are letting the bigger opportunity slip by...

THERE HAS TO BE A BETTER WAY!

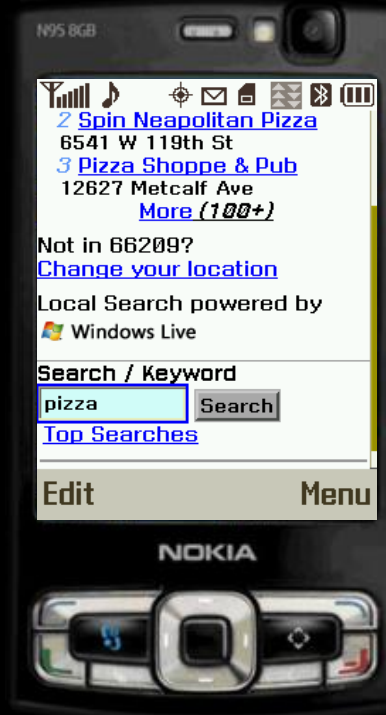
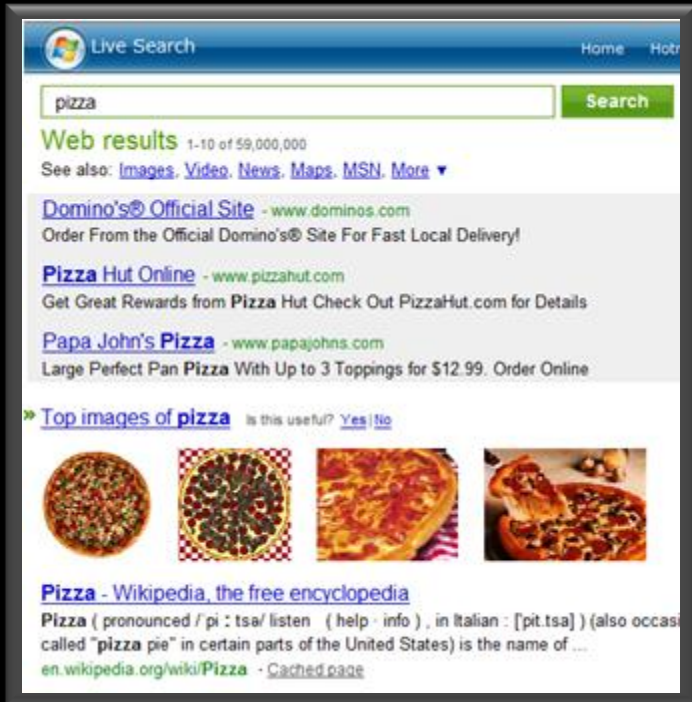
Step 1: Eliminating the islands



- Operators need to define a common mobile widget specification across handsets & operating systems
- Developers can chase a market of 4 billion subscribers
- Billing and settlement through existing operator systems with in-application billing capability
- Consumer choice & portability

A TRUE WORLD OF APPLICATIONS

Step 2: Engaging with the network



- Search based on current location, typical location & behavior
- Local advertising
- Click to call
- Online ordering
- SMS confirmations
- Maps & directions

A BETTER SEARCH APPLICATION

Step 2: Engaging with the network



- Social networking updates and feeds
- Enhanced address book with presence
- Multiple messaging modes
- Addition of location information
- Local advertising

A BETTER COMMUNICATION APPLICATION

We need the global mobile Internet

SDK

Developers:

- GLOBAL developer community using a single SDK
- NETWORK and DEVICE APIs for compelling applications
- STRONG revenue share business model including operators

A

App Stores

Applications Store:

- OPERATOR PORTALS as integrated applications stores
- BUSINESS and CONSUMER applications
- BILLING & CUSTOMER CARE SYSTEMS for financial settlement

Device:

- CHOICE of device and PORTABILITY of applications
- A PRO-CONSUMER solution!

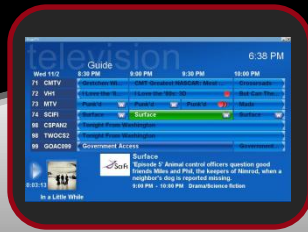


A GSM 2.0 APPLICATIONS PROPOSITION!

The bigger opportunity...



Information



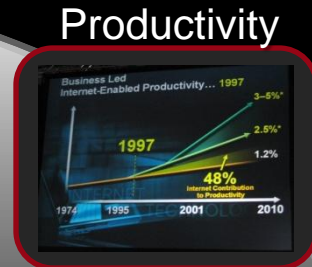
TV & Movies



Games



Web Communications



Productivity



Music & Memories



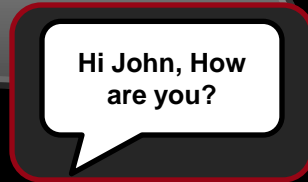
At the PC



On the Go



TV/Stereo



Voice Communications

THE CONNECTED LIFESTYLE!

A woman wearing a white visor and a light-colored top is blurred as she moves from left to right across the frame. The background is a dense wall of hundreds of mobile phones of various colors and models, creating a mosaic effect.

THANK YOU!

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