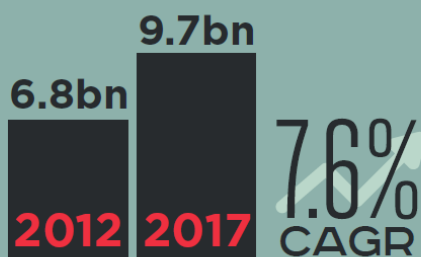




THE MOBILE ECONOMY

Global Connections



Operator Revenues



Ecosystem Revenues



Mobile Broadband Growth



Mobile Data Volumes



2012 has seen more mobile traffic than all the preceding years combined. 66% CAGR

Global Subscribers



Ecosystem Revenues Growth



LTE Growth



LTE/4G networks will account for

ONE in FIVE

Mobile Broadband connections by 2017 (versus 1 in 25 in 2012)



Ecosystem Jobs Created



1,300,000

Adding 1.3m jobs in the next 5 years

Ecosystem Capex Spend



Ecosystem Contribution to Public Funding



Ecosystem Contribution to Global GDP



SOURCE: A.T. KEARNEY, CISCO 2013 MOBILE VNI STUDY GSMA INTELLIGENCE

MOBILE ECOSYSTEM IS DEFINED AS MOBILE NETWORK OPERATORS, DEVICE MAKERS, CONTENT PROVIDERS, DEVICE DISTRIBUTION COMPANIES AND MOBILE INFRASTRUCTURE EQUIPMENT MANUFACTURERS.

THE SOCIOECONOMIC IMPACT OF THE 'CONNECTED LIFE' OVER THE NEXT FIVE YEARS



One million

The number of lives mHealth will save in sub-Saharan Africa over the next five years



One in nine

The number of lives saved in road accidents in developed countries over the next five years due to mobile enabled in-car emergency services



\$400 billion

The amount saved in 2017 from the annual healthcare bill in developed countries as a result of mobile healthcare solutions



A week back every year

Smart commute interventions in developing world cities will give commuters back a whole week's worth of time every year



40 million

The number of people in developing countries, equivalent to the population of Kenya, that can be fed each year due to fleet telematics preventing food wastage during transport



180 million

The number of children in developing countries that will have the opportunity to stay in school between now and 2017 due to mEducation



1.2 billion trees

In developed world cities, smart metering will reduce carbon emissions by 27 million tonnes – equivalent to planting more than 1.2 billion trees

THE UNSTOPPABLE RISE OF NFC



SIM-based Near Field Communication (NFC) makes your smartphone even smarter. It offers payment, ticketing, and couponing on one device. No wonder its popularity is exploding across the globe.

NFC is a wireless technology that can:



Replace paper tickets on transport systems



Replace cash and credit cards to purchase goods and services



Replace vouchers and coupons



Replace traditional keys to hotel rooms, offices and homes

Potential is growing

50%

Proportion of all smartphones NFC enabled by 2015

50%+

Proportion of spending put through Visa in Europe in 2020 via a mobile device

85%

Proportion of new Point of Sale (PoS) terminals shipped in 2016 that will be contactless

1bn

Number of SIM-based NFC handsets that will be sold by 2016

\$50bn

Value of transactions these handsets will support by 2016

15bn

Number of NFC tickets delivered to mobile devices worldwide by 2014

300m

Number of NFC smartphones, tablets and eReaders that will be sold in 2013

100k+

Number of contactless enabled PoS in the UK

600k+

Number of contactless enabled PoS in China

\$13 trillion

Total value of global mobile payments predicted by 2017

How it works

NFC is a contactless radio technology that can transmit data between two devices within a few centimetres of each other



A SIM-based NFC service stores sensitive data in an applet in a dedicated secure domain within the SIM card (known as the secure element) where it can only be accessed by authorised applications running on the handset. The deployment of mobile NFC services, which use the SIM as the secure element, enables authentication, security and portability across many different handsets.

Adopting SIM-based NFC globally will also ensure economies of scale and interoperability, enabling people around the world to benefit from NFC services, regardless of their operator network or device type.

Sources
ABI
Juniper, 2011
Visa, Jan 2012
Deloitte, Jan 2012
Gartner, March 2012
Juniper, August 2012
NFC Times, June 2012
UK Cards Association, September 2012



THE ROAD TO RICH COMMUNICATIONS

Industry Snapshot

9.6tn

9.6 trillion
messages
sent in 2012

28.2tn

28.2 trillion
messages
forecast for
2017



\$1.6bn

Mobile operators around the world are expected to take in a cumulative \$1.6 billion over the 5 years from 2012 to 2016 from RCS service fees

Strong RCS Ecosystem



31 OPERATORS LAUNCHED
OR COMMITTED TO LAUNCH



8 HANDSET VENDORS
OFFERING PRODUCTS



19 SUPPLIERS OF
HOSTED SOLUTIONS



5 LEADING INFRASTRUCTURE
VENDORS WITH FULL SOLUTIONS

joyn Services Are Here - Now



Enables users to
share instant messages



Enables users to share files
such as photos
with their contacts



Enables users to share
pictures and video
whilst speaking



Works on any
device, on any
network

RCS is Live

GERMANY

Vodafone has launched for
Android users. T-Mobile
and O2 launching in 2013

SPAIN

World's first interoperable
country-wide network launched by
Movistar, Orange and Vodafone

USA

MetroPCS is the first US operator
to launch joyn services

KOREA

KT, LG U+ and SK Telecom
launched in 2012 - over 1 million
downloads of the joyn app to date

New Products & Services on the RCS Platform

RCS APIs already exist
to make development easier for:



ENTERPRISE USERS
GROUP COLLABORATION IN THE WORKPLACE



GAMERS
MULTIPLAYER GAMING POWERED BY JOYN



HOME USERS
FIXED LINE ACCESS AND SMART TV SET-TOP BOXES



CUSTOMER CARE CENTRES
VIDEO ENHANCED CALLS

joyn Accredited Devices

SONY

SAMSUNG

htc



HUAWEI

NOKIA



LG

Coming Soon:



BlackBerry

ZTE 中兴

RCS Downloadable Apps

AVAILABLE NOW:



ANDROID



COMING SOON:

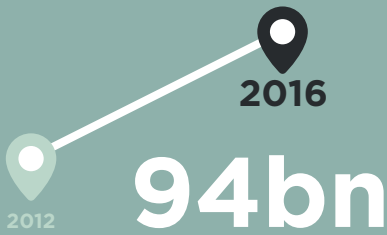


Windows

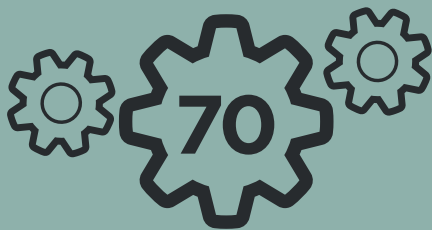


NETWORK APIs

INTEGRATING OPERATOR SERVICES
TO CREATE MORE COMPELLING
APPLICATIONS



Volume of API transactions a tier 1 mobile operator will reach per month in 2016



Companies, on average are releasing about 70 APIs each week



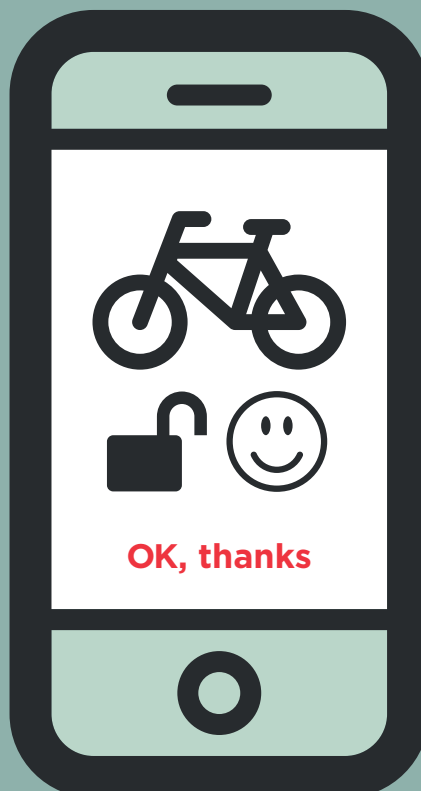
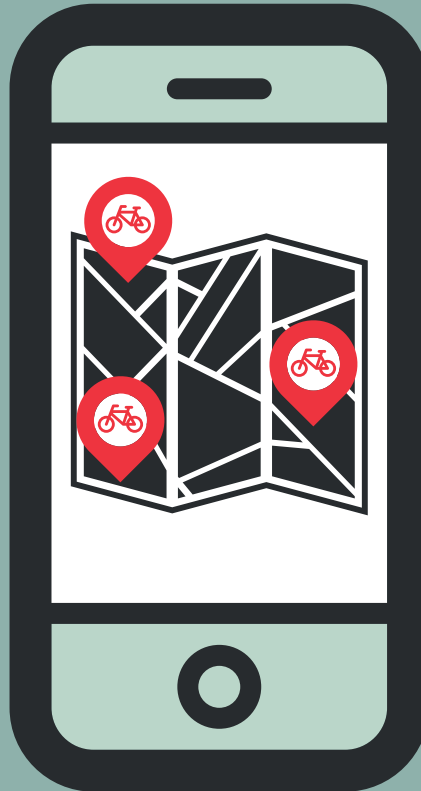
The mobile network APIs market is expected to account for nearly \$75 Billion in global revenues worldwide by 2016, growing at an annual rate of 37% between 2012 and 2016



Regional Revenue Split

North America and Western Europe will remain the largest market segments by the end of 2016, Asia Pacific and Middle East and Africa will see the healthiest growth rates from 2012 to 2016

Identity, Location and Payment APIs Help Get You Moving



OneAPI Exchange APIs



Identity



Location



Messaging



Payment

apigee

OneAPI Exchange powered by
Apigee, a leading technology
provider