

An Introduction to the GSMA's Mobile Innovation Market and Development Fund

For



**Massachusetts
Institute of
Technology**

Next Billion Network Initiative

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All GSMA meetings are conducted in full compliance with the GSMA's anti-trust compliance policy



GSMA Membership Types & Stats

■ Full Membership

- Full Membership is open to:
 - Licensed 2nd & 3rd GSM mobile network operators (GSM, GPRS, EDGE, 3GSM, HSPA)
 - Government administrations

■ Full Membership Statistics

- Total number of Full members: 754
- Total number of Associate members: 211
- Representing All countries

The GSM Association Board



Hutchison Mobile: Craig Ehrlich (Chairman)

GSMA: Rob Conway (CEO)

AT&T: Bill Hague EVP

Bharti: Manoj Kohli, President & CEO

China Mobile: Lu Xiangdong, EVP

China Unicom: Zhang Fan, CTO

KTF: Dr Young-Chu Cho, CEO

mobikom austria: Boris Nemsic, CEO

MTN: Phuthuma Nhleko, CEO

MTS: Leonid Melamed, CEO

NTT DoCoMo: Takanori Utano, EVP/CTO

Orange SA: Brigitte Bourgoin, EVP

Orascom: Naguib Sawiris, CEO

SK Telecom: Shin-Bae Kim, CEO

Singapore Telecom Mobile: Ng Noke Weng, CTO

Smart Communications: Napoleon Nazareno, CEO

Softbank: Tetsuzo Matsumoto, CSO

T-Mobile: Joachim Horn, CTO

Telefonica Moviles/02: Vivek Dev, COO

Telenor Mobile: Arve Johansen, Deputy CEO

Telstra: Sol Trujillo, CEO

TIM: Franco Bernabe, CEO

Turkcell: TBC

Vimpelcom: Alexander Izosimov, CEO

Vodafone: Terry Kramer, Chief of Staff

Zain Group: Dr Saad Al-Barrak, CEO

EMC Chair: Stein Hansen

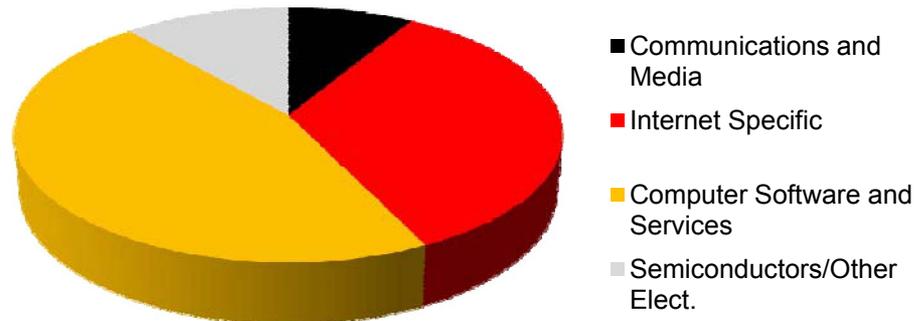
Mobile Innovation Market - Summary

- **Purpose is to develop an ecosystem that brings together Operators, Investors, Innovators and Corporate Partners to drive mobile innovation**
 - Ensure mobile innovation aligns with Operator business strategies
 - Accelerate time to innovation and time to market by “vetting” and promoting top innovators

Program Addresses Growing Market Need

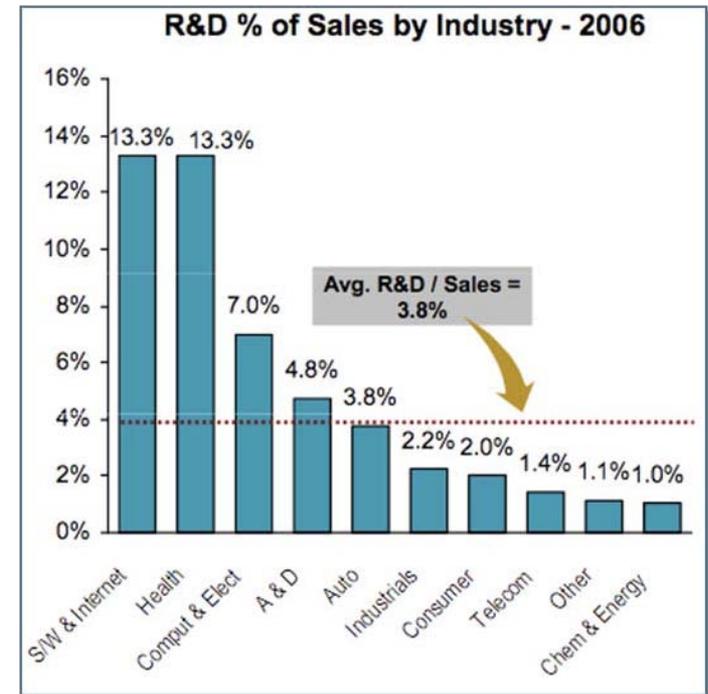
Flat to declining investment

Q1 2008: % of total investment by industry



Source: NVCA w/ GSMA analysis

R&D under-indexes other industries



Source - Booz Allen Hamilton

Potential of mobile is exciting , but investor excitement is tempered by:

- Role of incumbents in the eco-system
- Limited number of home run exits
- Fragmentation of underlying mobile platforms

Cultivating a Following

Mobile Innovation Market Events

Barcelona, Atlanta, Tel Aviv, and Macau

Thought leadership sessions with mobile innovation ecosystem influencers

Mobile Innovation Awards Regional Tournaments and Finals

Speed dating and networking sessions

Agenda

The New Mobile Model –
cooperation, coopeition, collaboration, etc

14:30–15:00 Registration and Networking

15:00–15:15 Opening keynote address:

Bill Gajda - Chief Commercial Officer, GSMA

15:15–15:30 Keynote presentation:

Dr. Mike Short - Vice President, R&D,
Telefonica O2 Group & Past Chairman GSMA

15:30–16:20 Virtual Top 9 Innovator Pitch Presentations: Part I

Top Innovator companies will deliver concise and compelling pitch presentations, and then face probing Q&A from a distinguished panel of judges.

16:20–16:30 Coffee Break

16:35–17:25 Virtual Top 9 Innovator Pitch Presentations: Part II

Top Innovator companies will deliver concise and compelling pitch presentations, and then face probing Q&A from a distinguished panel of judges.

17:25–17:35 Coffee break

17:35–18:15 Panel Discussion:

The New Mobile Model – cooperation, coopeition, collaboration, etc

Moderator:

Bill Gajda - Chief Commercial Officer, GSMA

Speakers:

Hugo Barra – Group Product Manager and
Global Product Lead for Mobile, Google

Avner Mor - General Manager of the Telecom
Products Group, Microsoft Israel R&D Center

Dana Porter – Vice President of Marketing, Amdocs

Erez Paz - Vice President, Marketing and
Content, Partner Communications

18:15–18:25 GSMA Mobile Innovation Global Competition–

Virtual Tournament Awards Presentation
Global Semi-Finalists & Global Finalist
Award Announcement

18:25–19:30 Evening Networking Cocktail Event

The banner features the GSMA logo and the text "Mobile Innovation 2009 Global Competition" in white on a black background. Below the title, it lists sponsors: Carmel Ventures, pitango, and Sequoia Capital. It also lists partners: orange, Microsoft Israel R&D Center, Google, and amdocs. Technology partners include LiveU, and media partners include TheMarker. A bar chart on the right shows the progression from "INNOVATE" to "COMPETE" to "WIN" to "DEPLOY GLOBALLY". The date and location are "September 16, 2008 | Herzlia, Israel". The bottom text reads "GSMA Mobile Innovation Marketplace Israel & Virtual Online Tournament".

Mobile Innovation 2009 Global Competition

Sponsored by: Carmel Ventures, pitango, SEQUOIA CAPITAL

In Partnership with: orange, Microsoft Israel R&D Center, Google, amdocs

Technology Partner: LiveU, Industry Partner: jma, Media Partner: TheMarker

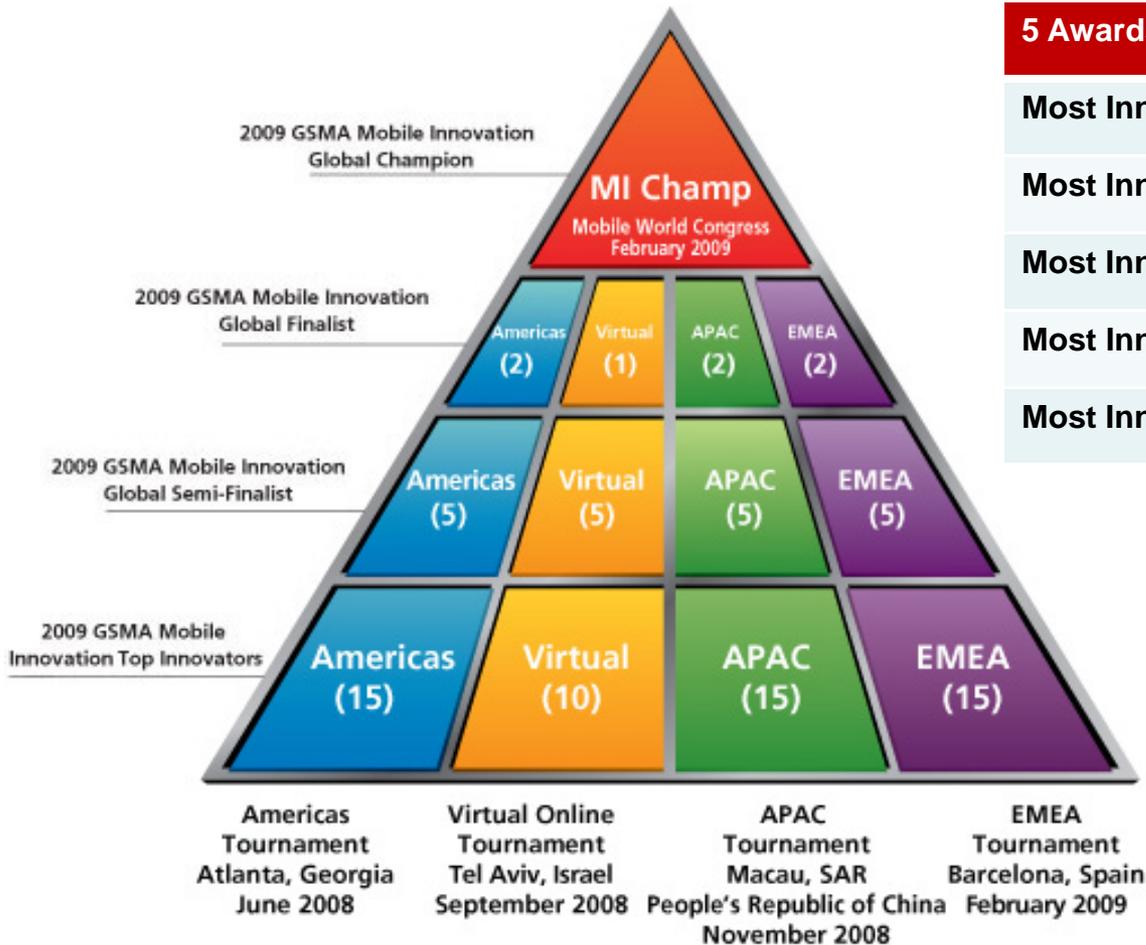
INNOVATE, COMPETE, WIN, DEPLOY GLOBALLY

September 16, 2008 | Herzlia, Israel

GSMA Mobile Innovation Marketplace Israel & Virtual Online Tournament

Discovering Top Innovation

2009 GSMA Mobile Innovation Global Award Competition



5 Awards Categories

Most Innovative True Mobile Start-up

Most Innovative Consumer Application

Most Innovative Application in a Vertical Market

Most Innovative Carrier Infrastructure or Platform

Most Innovative Wireless Device-centric Technology

If You Build It, They Will Come

Innovators

- Forum for controlled global exposure to target audiences (investors, customers, OEMs, partners, etc)
- Act as a “solver” & respond to posted requirements
- Tools to initiate dialogue with prospective customers and partners
- Tailored marketing for different target stakeholders

MNOs

- Understand investment landscape
- Identify and assess opportunities and threats
- Act as a “seeker” & post requirements
- Expose APIs to 3rd parties
- Propose trials and commercial relationships with entrepreneurs
- Develop trusted relationship with VCs and entrepreneurs
- Coordinate resources for analysis

www.
Mobileinnovation
.org

Investors/VCs

- One stop search for mobile investment opportunities
- Due diligence tool to understand market sectors and competing players
- Track the progress of companies interested in following
- Find great companies before other investors
- Interact with “demand side” of the equation

Suppliers / OEMs

- Improve technology scanning
- Enhance innovation management
- Establish trials and commercial partnerships one stop search for opportunities to invest in or acquire technology companies
- Facilitate collaborations across different sectors and disciplines

Development Fund - Who We Are

- Work with mobile operators to accelerate mobile solutions for people living under \$2 per day
- Launched in 2006 to catalyse the uptake of GSM technology for social and economic development
- Core part of the GSMA, the operator-led trade association representing the mobile industry



Our Beliefs

- Doing good is good business
- The mobile industry is uniquely positioned to deliver economic & social value
- With more than 3 billion users, base of pyramid markets are the future for mobile growth and innovation
- By working closely with mobile operators we can accelerate the benefits of mobile for all



Our Objectives

- Increase the number of effective, scalable and replicable development initiatives using mobile technology in emerging markets
- Implement these initiatives in a scalable and sustainable fashion, bringing socio-economic benefits to individuals and communities
- Increase awareness among governments and the development community of how GSM acts as an agent of development and can be used to bridge the digital divide



Our Focus Areas



Connectivity



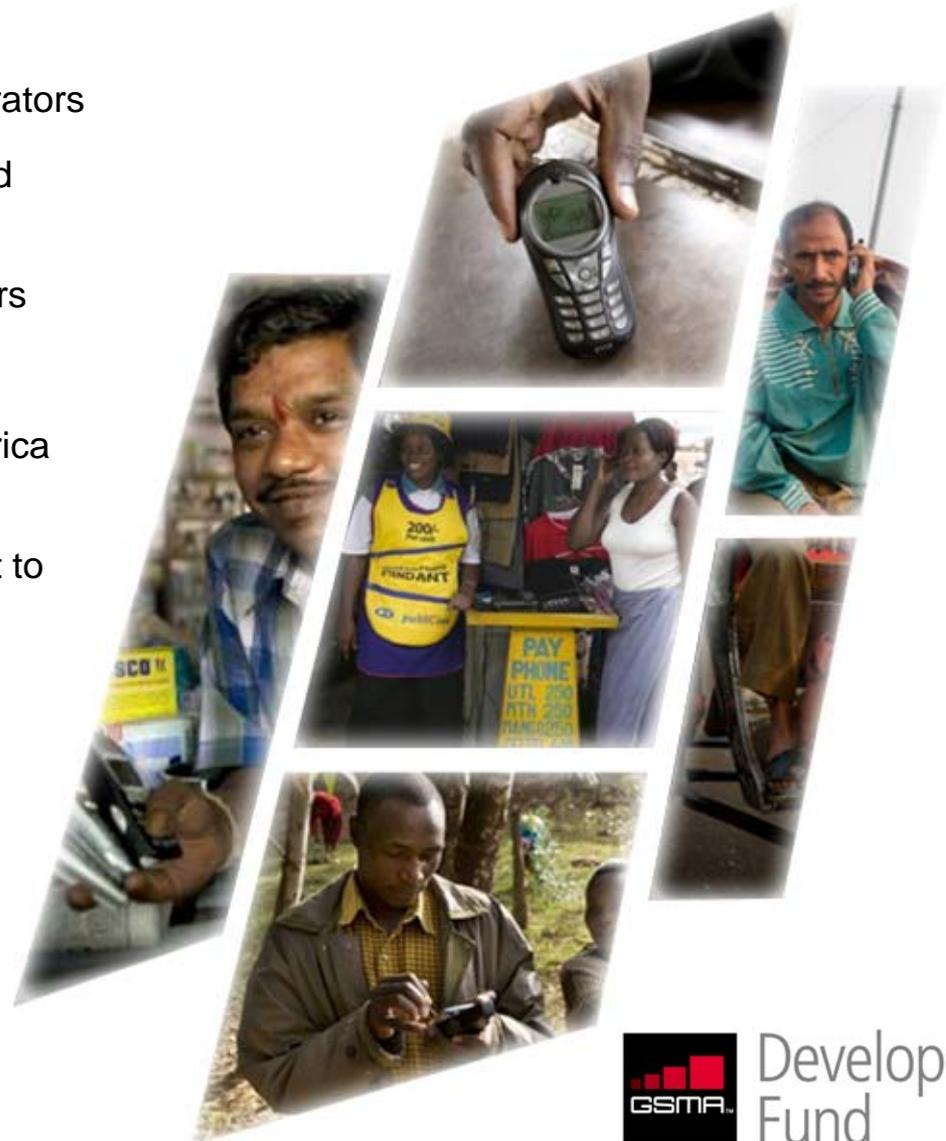
Energy



mServices

Highlights To Date

- 25 projects in 13 countries with 20 operators
- Over 150,000 persons directly impacted and 1 million indirectly
- 35,000 Community Phone entrepreneurs
- 600 GSM Internet cafes in 5 countries
- 4 HSPA connected Internet cafes in Africa with 2 operators
- GSM voice and data services rolled out to 25,000 refugees in Uganda
- GSM voice and Internet services to UN Millennium Village in Rwanda
- Biodiesel powering 350 BTS in India
- Green Power for Mobile programme launched



Development
Fund



Mobile Innovation Market

Thank you!

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www.mobileinnovation.org

MIT OpenCourseWare
<http://ocw.mit.edu>

MAS.965 / 6.976 / EC.S06 NextLab I: Designing Mobile Technologies for the Next Billion Users
Fall 2008

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