



Adoption of Data Applications in Emerging Markets

New opportunities with first-time users eager for information

Mobility World Congress 2007

Hong Kong, People's Republic of China

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Chairman of the Board

December 5, 2007

Agenda

- **OMA Review - Who we are and what we do**
- New users present first-time opportunities
- Unique roll of standards
- Business and social value of standards
- Summary



OMA - The Open Mobile Alliance

VISION

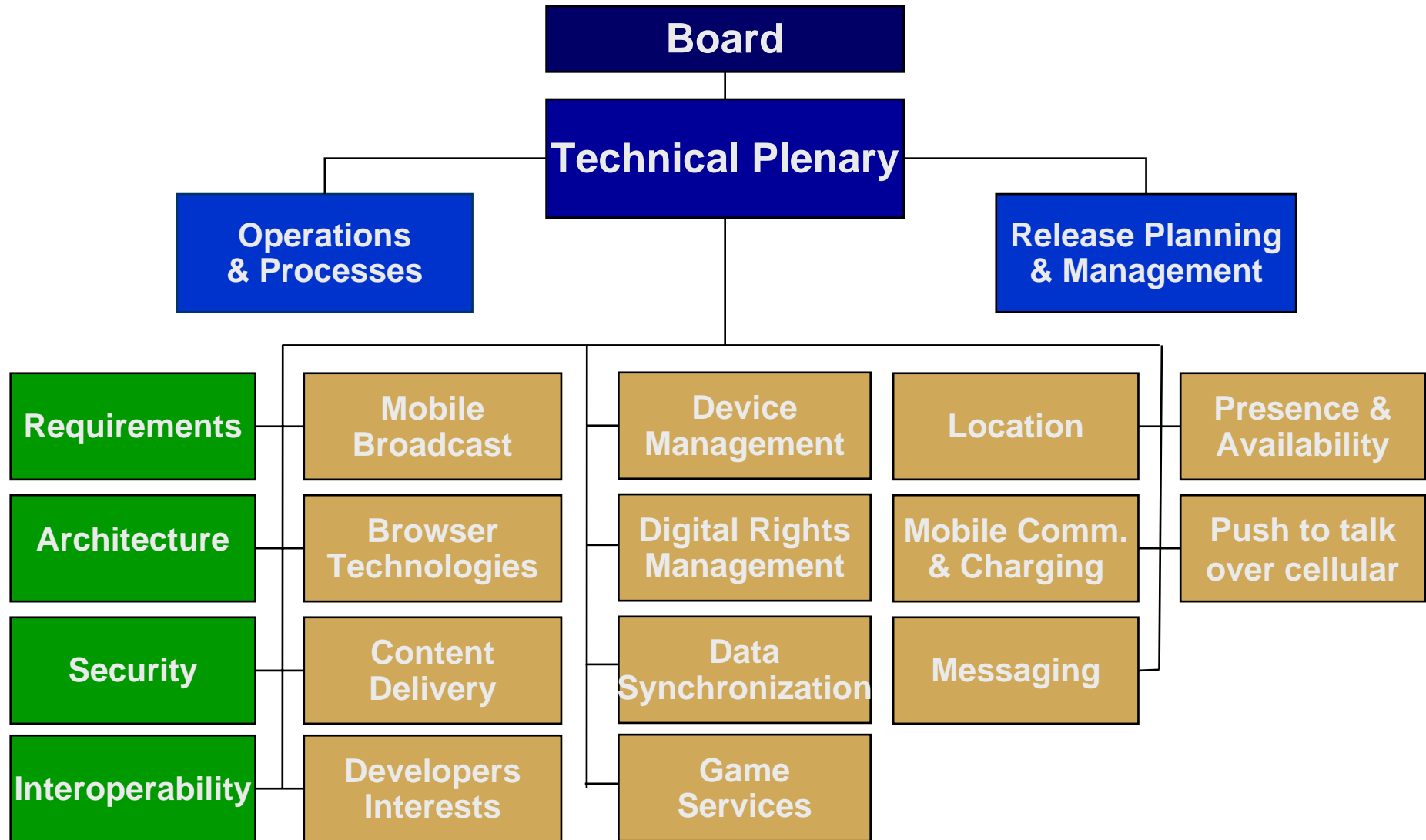
**No matter what device I have,
No matter what service I want,
No matter what carrier or network I'm using,
I can communicate, access and exchange information.**

380 (+) Global Members developing open, market driven interoperable specifications for global adoption - representation from across the widening mobile value chain

Created in June 2002 by leading mobile operators, device and network suppliers, information technology companies, content and service providers

- 42 Formal Cooperation Agreements around the globe
- 39 Enablers published and over 100 active work items

OMA Organization



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Mature service in emerging markets

- Full integration of Internet and Mobile services
 - New infrastructure should take advantage of existing knowledge, capabilities and services – not reinvent the wheel
- Demand for access greater than preference for method
 - Communicating, accessing and exchanging information is more important than how the end user connects
 - New users have no expectation based on established experience of a mature market
- Build infrastructure that can support data services
 - Adoption of data services is based on meeting basic needs, not the latest gadget or convenience
 - Internet access and content distribution are different for a family farmer in the bush than a soccer Mom in Sacramento
 - Standards approach increases local value and global interoperability decreases cost over the long term

Unique capabilities of the handset

- Access and interact with content without owning a television or a PC
 - According to MultiMedia Intelligence, Multimedia Mobile Phone Shipments will surpass Television shipments in 2008
 - Multi-media phones become less expensive with wider deployment of complex infrastructure
- Millions of first time users world wide join a network every month
 - Device sophistication and broad distribution create new opportunities for players not yet in the traditional mobile value chain
 - Seamless connectivity across networks and multiple bearer technologies means greater demand for global interoperability - therefore standards
- Content providers, traditional network operators, device manufacturers, IT and network infrastructure vendors are all stake holders in emerging markets
 - Recognizing the impact of the handset in emerging markets means greater commitment to standards from across the established chain

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The need for standards

- Standards prevent fragmentation - a danger in emerging markets
 - Interoperability should be a cornerstone for the deployment of new network infrastructure
 - Standards deployment in well-established markets can inform new market deployments
- New services, differentiation and wide adoption are dependent upon standards
 - Quality and reliability become key factors for product differentiation and customer loyalty
- Content providers and application services require standards for scalable distribution and wide adoption
 - Uniform approach to network resources and device functionality
 - Consistent user experience across devices, networks and locations

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Building communities and social value

- Barter systems are viable business models
 - First time connectivity and interactive data capabilities will provide nontraditional revenue and trade opportunities
 - Users who have lived 10 miles apart for centuries can now sell and distribute across a region or within family-based industries
- Wide communication and dissemination of information
 - The majority of news out of Myanmar during the recent uprising came from mobile phones
 - Rich, user-generated content for communities with literacy challenges
 - Models and uses not yet discovered or found
- Building these connections requires interoperability and standards across devices, networks and locations

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Summary

- Many users in emerging markets will have their first access to the Internet via the handset
- Full integration of Internet and Mobile services provides an excellent opportunity in emerging markets
- OMA provides a unique and successful set of standards for global adoption of mobile data services
- Social value -- Up-to-date infrastructure can enable global awareness and local impact
- Emerging markets may be well ahead of their counterparts in more saturated markets in adopting the hottest new mobile technologies