
Mobile and Development Intelligence

Prepared for ITU Workshop on ICT Innovations, March 20, 2012



The GSMA Development Fund

The GSMA represents the interests of mobile operators worldwide. Spanning 219 countries, the GSMA unites nearly 800 of the world's mobile operators, as well as more than 200 companies in the broader mobile ecosystem.

The Development Fund 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. Since 2006 we have partnered with 35 mobile operators, rolling out 53 services, impacting tens of millions of people across 30 countries.



The opportunity provided through mobile

- 5bn connections in the developing world this year and 18 new connections every second
- 91% of global connections are made using the GSM family of technologies
- The largest underserved markets are in remote, rural geographies and amongst women
- Mobile is being used to deliver services in adjacent sectors e.g. banking, health, agriculture and education
- The mobile phone is a channel connecting the user to others and the accumulated knowledge of humankind, delivered via voice or data
- In large parts of the developing world, people's first and enduring experience of the internet will be through the mobile device



Mobile & Development sectors are emerging into a rapid growth phase

Mobile Sector	Planned and Live Products & Projects	Number of Practitioners
Developing World Mobile Industry	>10,000	Millions
Mobile Money	>200	5,000
mAgriculture	150	2,000
mHealth	550	20,000
mLearning	>100	1,000
mWomen	35	1,600
Green Networks	25,000 (sites)	10,000

- In parallel with the explosive growth in the number of mobile connections, the number of products & projects in adjacent sectors using mobile is also growing rapidly
- Investment from the commercial industry and donor organisations is increasing significantly
- These sectors will begin to mature over the next 2-5 years
- The growth and scale of the developing world mobile industry provides a large user base for MDI. There are currently millions of people active in this industry.



Vertical need-based development sectors with distinct application areas for mobile

Education

- Career development / life skills
- Health education
- Language learning
- Edutainment
- Teacher training and tools

Health

- Remote monitoring / diagnosis
- Data collection
- Adherence & compliance
- Training & capacity building
- Health education & promotion
- Health supply chain
- Healthcare payments & insurance
- Medical devices

Agriculture

- Helplines for advice / trading assistance
- Broadcast info content
- Automated, localised content
- Farmer financial services
- Data collection
- Weather monitoring
- Supply chain efficiency

Employment

- Business advice helplines
- Job posting services
- Training and skills development
- Inventory ordering and stock management

Financial services

- Money transfer
- Airtime & prepaid services
- Bill payment
- Bank account management
- Microfinance
- Microsavings
- Microinsurance
- Corporate payments
- mCommerce

Democracy

- Governance and democracy monitoring
- Lobbying tools
- Tools for enhanced service delivery

Corporate & NGO use

- Prepaid vending platforms
- Surveying tools
- Communications tools
- Crisis monitoring
- Supply chain management
- ICT training resources for small organisations



The case for MDI

MDI will educate and unite all who want to harness the power of mobile for good

The mobile phone's ubiquity is uniquely well-placed to drive economic and social development in emerging markets. Investments in the mobile and development sectors are rising yet there is limited data on which to base these decisions. MDI is designed to bridge this information gap.

MDI is a freely available, online platform of market and impact data, analysis and access to an active community of practice



But, there are macro challenges faced by the industry and these specific sectors



Mobile and Development Intelligence

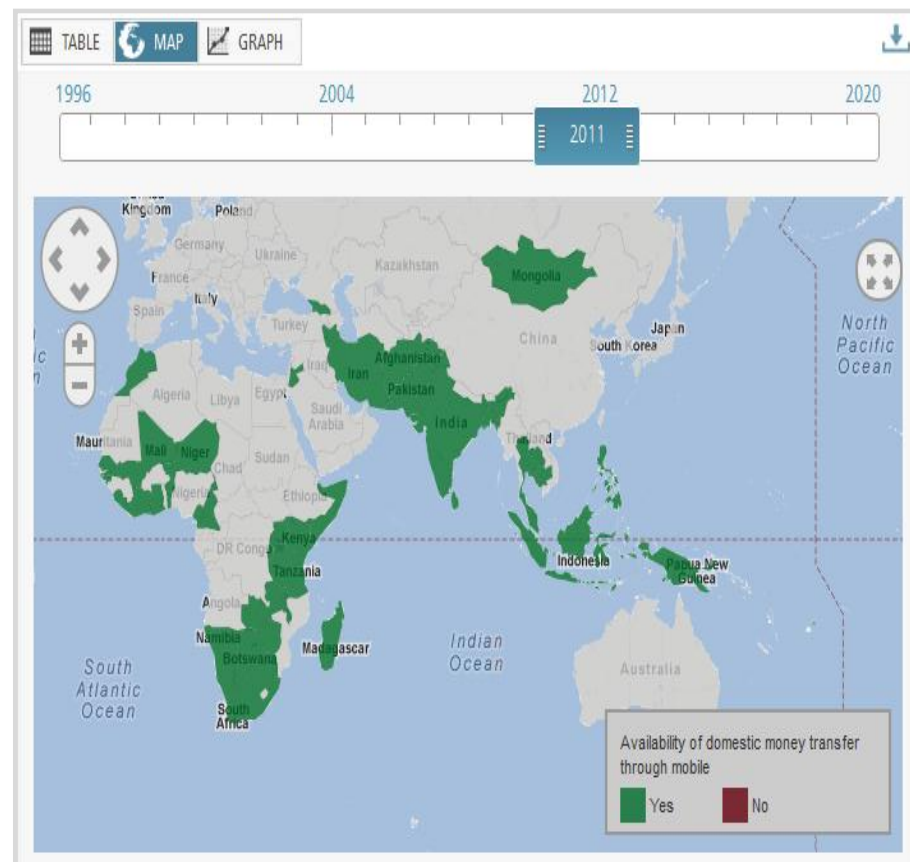
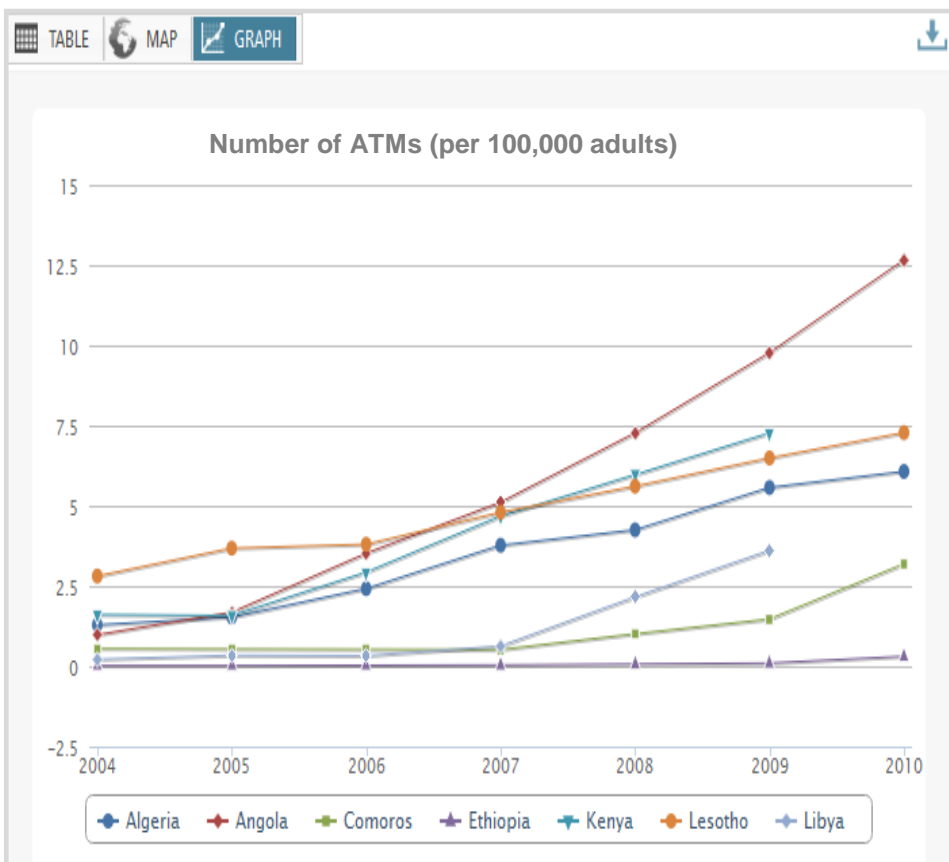
In order to increase total investment and activity in mobile and development and in parallel amplify the social, economic and environmental benefits products and projects are built to deliver, the following barriers will be addressed:

- Lack of data for business cases, product strategies and programmes
- Limited visibility of organisations and community
- Limited understanding of the impact of mobile on development
- Fragmentation of platforms and limited cross sector convergence



MDI Objective 1: Provide a Freely Accessible, Online Repository of Data and Analysis

MDI will aggregate, cleanse and categorise data from multiple internal and external sources into a single, centralised data repository. Users will have the ability to manipulate, visualise and export the datasets



Objective 2: Provide Visibility of Organisations, Products & Services and Community

MDI will provide an online directory where users can access information about organisations and their products, services and initiatives. It will provide the *'who, what, where and how'*

Telefónica Group

Organisation Type	Mobile Network Operator
Primary Sector	Mobile Industry
Country	Global
Status	Live
Subsidiary Organisations	<ul style="list-style-type: none"> China Unicom - China Movistar (Telefónica) - El Salvador Movistar (Telefónica) - Chile Movistar (Telefónica) - Argentina Movistar (Telefónica) - Colombia Movistar (Telefónica) - Ecuador Movistar (Telefónica) - Venezuela Movistar (Telefónica) - Uruguay Movistar (Telefónica) - Mexico Movistar (Telefónica) - Nicaragua Movistar (Telefónica) - Panama Movistar (Telefónica) - Peru Movistar (Telefónica) - Guatemala Vivo (Telefónica) - Brazil
Web Address (URL)	http://www.telefonica.com/

Want to add your organisation?
Send us an email - Contact us

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Coming in the next version of MDI

MTN Mobile Money
Organisation: MTN
Sector: Mobile Money

General
Status: Live
Year Launched: 2009
Led by: Mobile Operator Led
Go to website

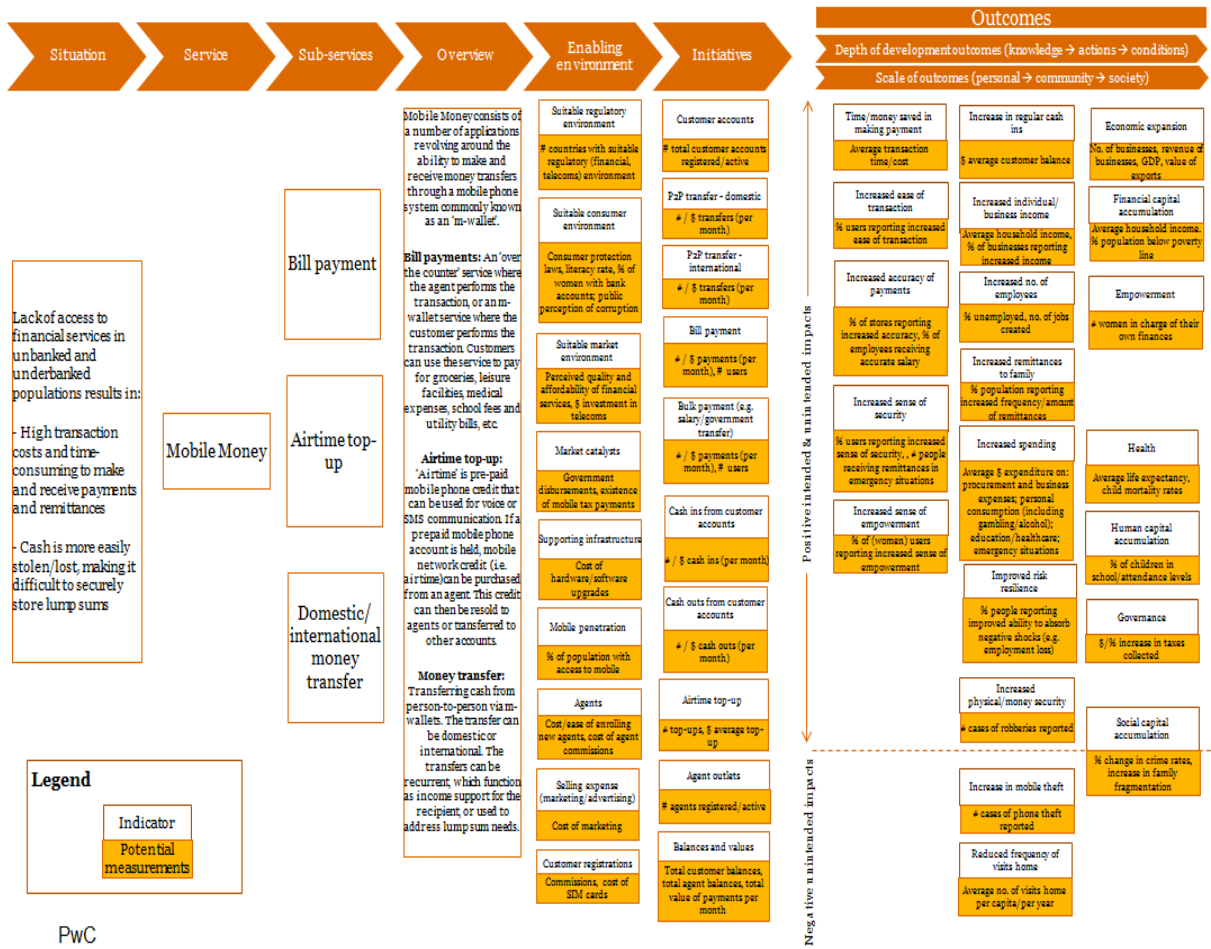
Product Offering
Airtime Top Up
Bill Payment
Domestic Money Transfer
M-Insurance

Partners
Technology
Fundamo
Gemalto
Bank
CAL Bank
Ecobank
Fidelity Bank



Objective 3: Clarify the Impact of Mobile on Development

Impact Pathway - Mobile Money

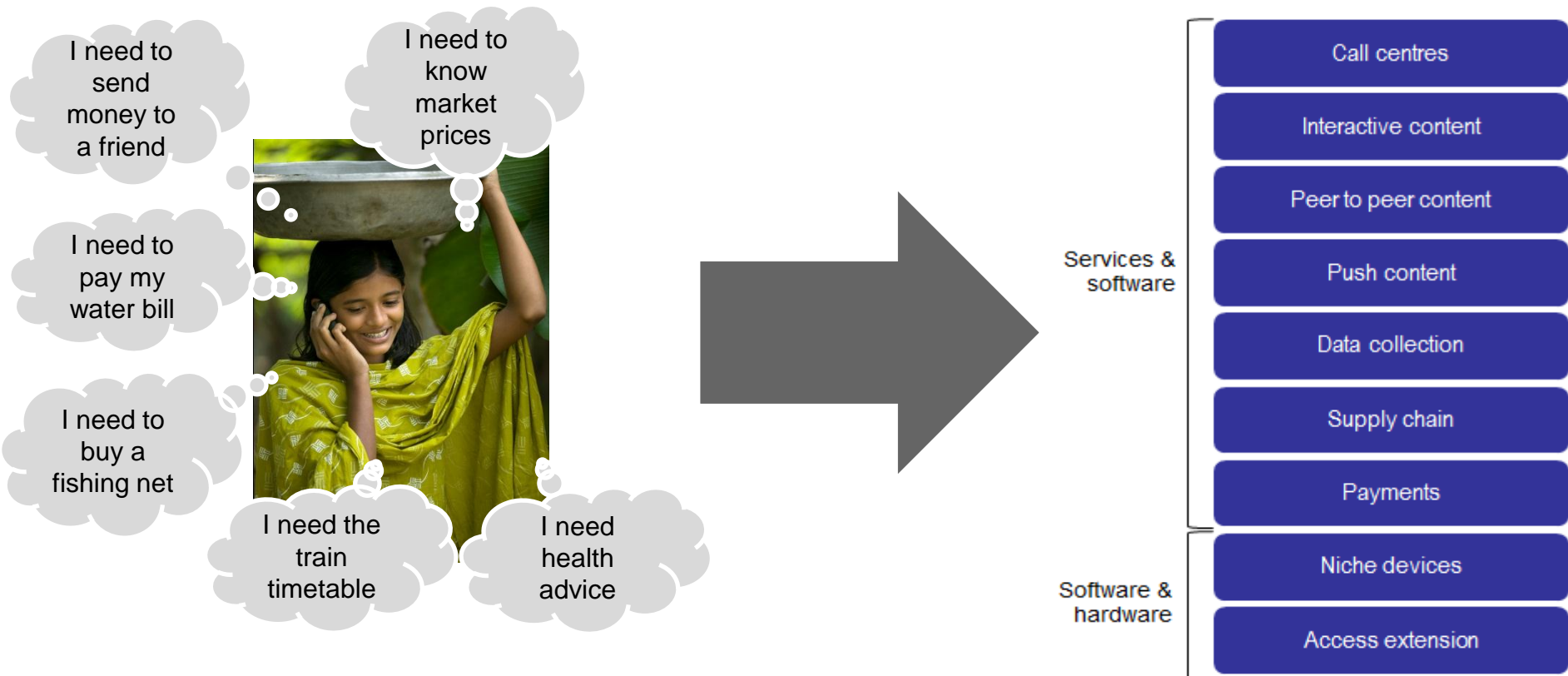


- Develop impact pathways for each specific sector to find and map evidence of socio-economic benefit
- Support modelling of socio-economic impact of mobile in other GSMA departments
- Host impact metrics from other GSMA departments e.g. impact of mobile on GDP



Objective 4: Thought Leadership on Technological Convergence

- To truly deliver across sectors, we have to start not from technology platforms but from user needs
- We need to understand the volume and types of daily transactions a user makes that can be better delivered by mobile
- Then we can work outwards from these user needs to design common platforms to deliver them



Reports, best practice guides and sector studies

Mobile and Development Intelligence



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PEOPLE

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Filter

Mobile Money

First Name Last Name Organization Name Contact	First Name Last Name Organization Name Contact	First Name Last Name Organization Name Contact >> More Contacts

Mobile Health

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Mobile Industry

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Find investors or investments

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Company Stage

Transaction Type

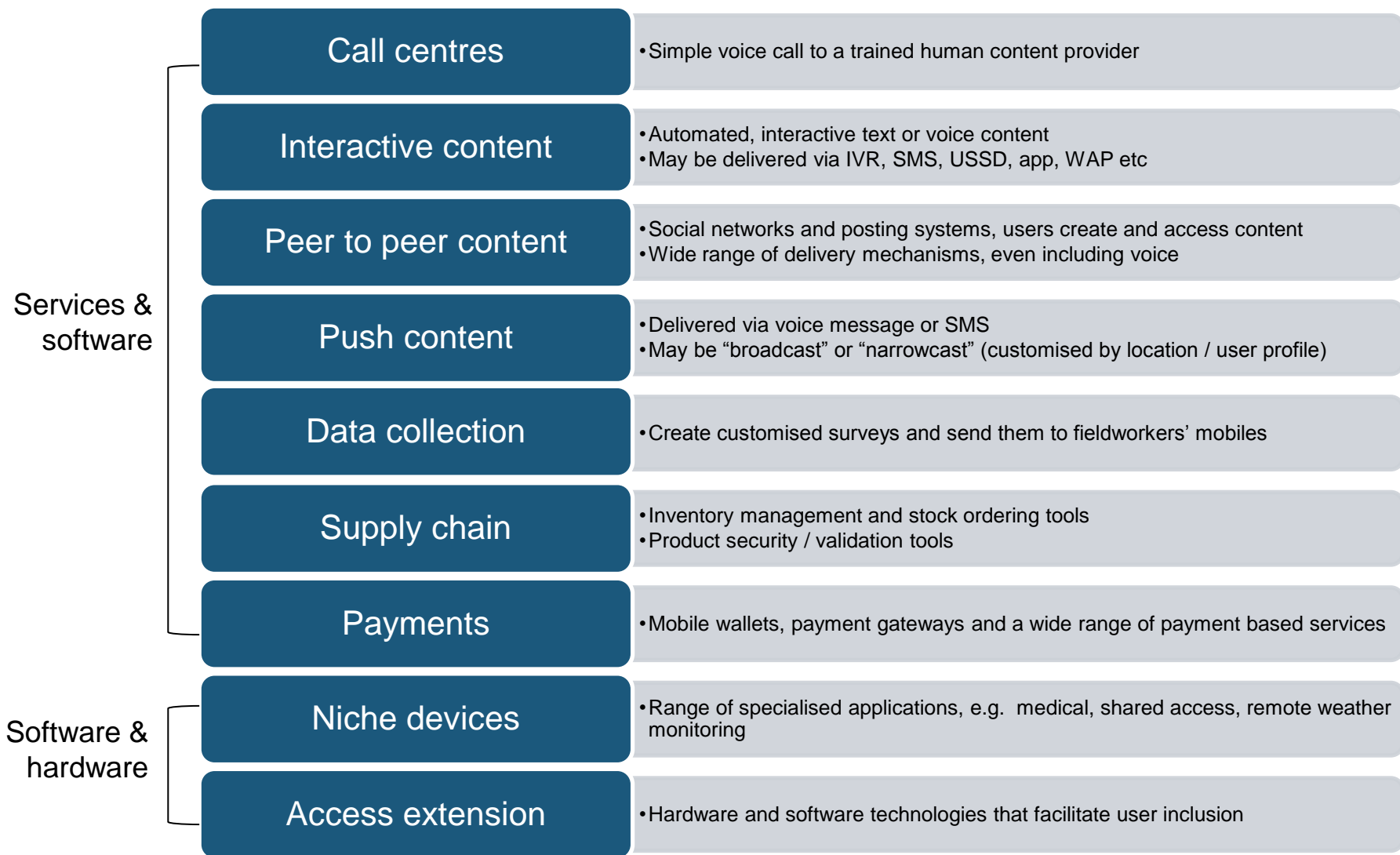
Transaction Size

Filter

Organisation Name	Products & Services	Contact
Movertical	mHealth for All	Contact
LionHouse	mPowered	Contact
HSPT	Life Systems	Contact



Mobile technology enablers being used in development projects



Analysis: 200+ projects were identified, each mapping onto an enabler and one or more verticals

M4D “Heatmap”

	Cross-sector	Learning	Health	Agriculture	Entrepreneurship	Financial services	T4GT	Corporate & NGO use	Total
Call centres	1	0	7	8	2	0	0	0	18
Interactive content	6	15	20	16	7	1	3	2	70
Peer to peer	11	1	2	6	7	0	1	1	29
Push content	1	1	7	6	1	0	1	4	21
Data collection	18	0	16	1	0	0	0	4	39
Supply chain	0	0	8	1	3	0	0	1	13
Payments	1	3	4	2	0	32	1	1	44
Niche devices	0	1	6	1	2	0	0	0	10
Access extension	18	0	0	0	0	0	0	0	18
Total	56	21	70	41	22	33	6	13	262

- Health, agriculture and financial services are the hottest verticals
- Interactive content, payments and data collection are the hottest enabler areas
- Roughly a quarter of projects identified are cross-sector in nature
- Most enablers have strong cross-sector potential



Analysis: We found an even balance between for-profit and not-for-profit M4D initiatives

Proportion of projects with a business model

	Cross-sector	Learning	Health	Agriculture	Entrepreneurship	Financial services	T4GT	Corporate & NGO use	Overall
Call centres	0%		57%	50%	50%				50%
Interactive content	50%	40%	55%	56%	57%	100%	0%	0%	49%
Peer to peer	82%	100%	0%	83%	86%		0%	0%	72%
Push content	100%	100%	0%	33%	100%		100%	25%	33%
Data collection	39%		31%	0%				100%	41%
Supply chain			63%	100%	100%			0%	69%
Payments	100%	33%	50%	100%		97%	0%	0%	84%
Niche devices		100%	100%	0%	100%				90%
Access extension	89%								89%
Overall	66%	48%	47%	56%	77%	97%	17%	38%	60%

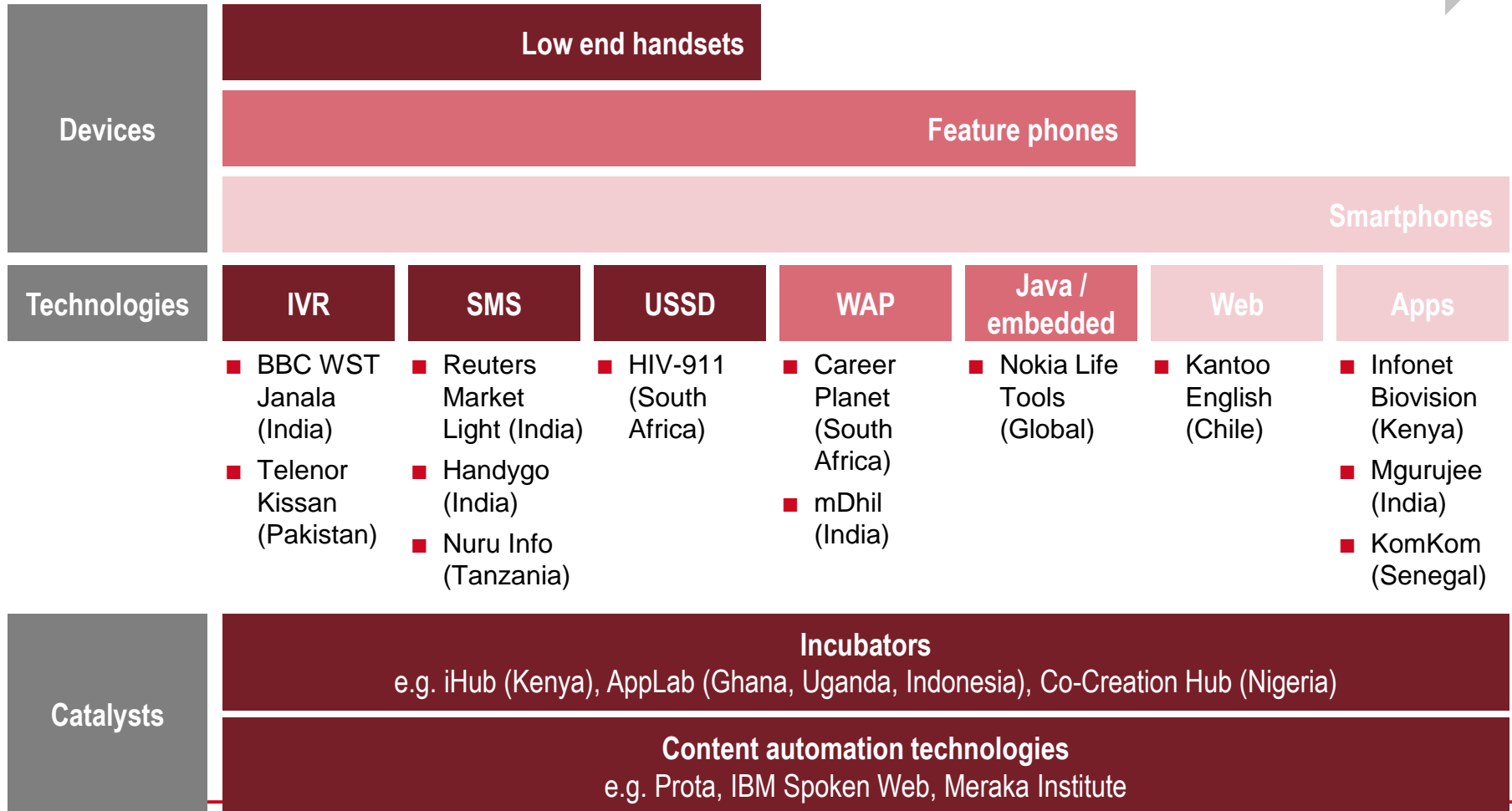
- Projects for entrepreneurship and jobs, financial services and corporate and NGO use appear to have the greatest business model potential
- Most call centres have been established by MNOs
- Every enabler area has at least some projects with a business model

Key



Innovation is occurring across a breadth of technologies and users

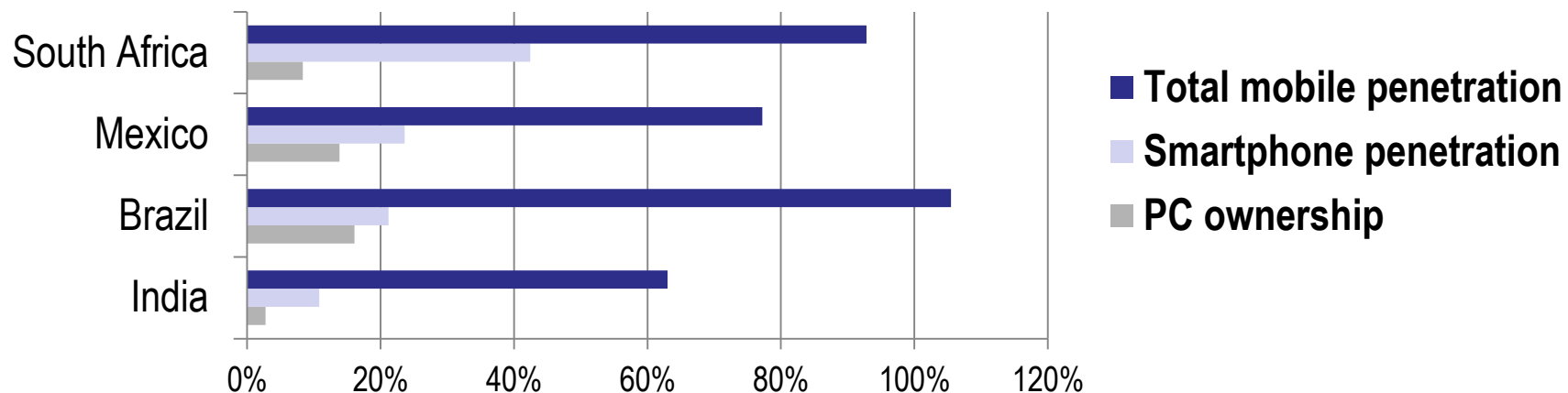
+ Higher capabilities
- Lower reach



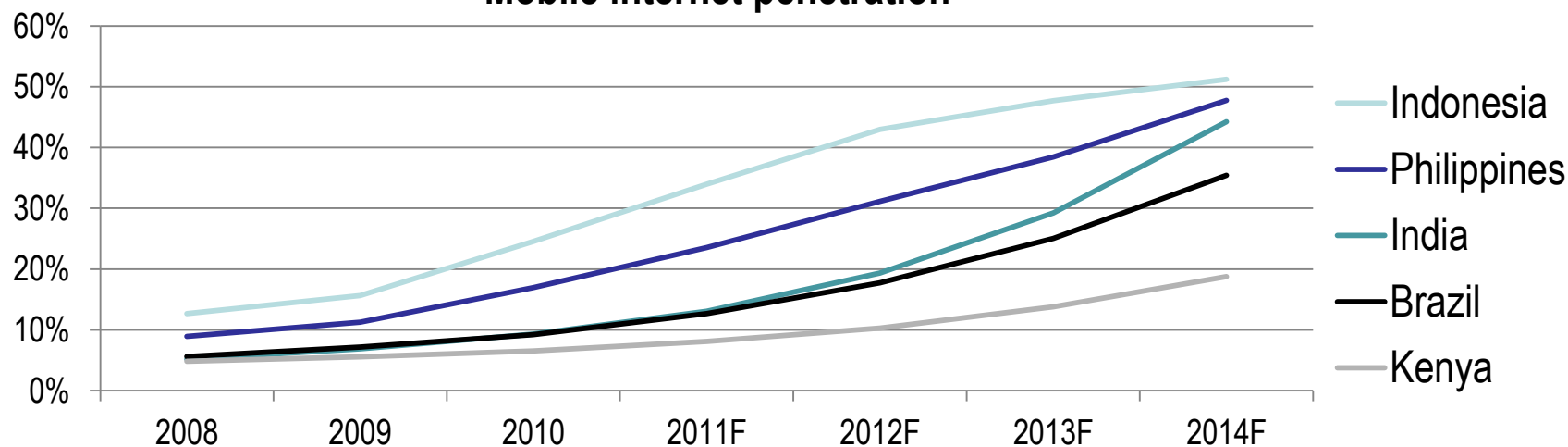
Interactive content: Smartphones will gradually open up a wider range of content options



Mobile for Development
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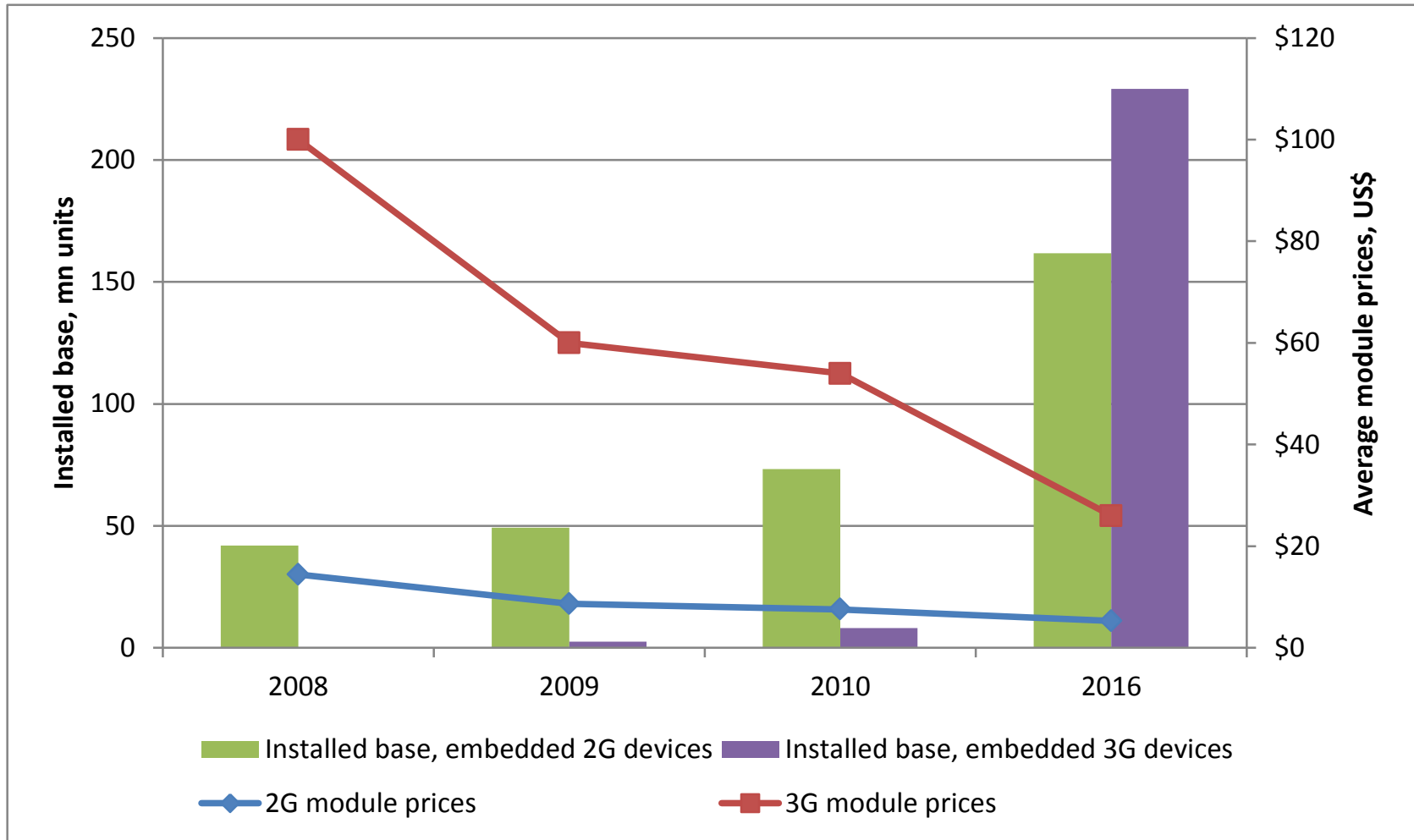


Mobile internet penetration



Source: World Bank, GSMA Wireless Intelligence, GSMA Analysis

Niche devices: Declining costs of embedded modules will drive more innovation in this area





www.mobiledevelopmentintelligence.com

