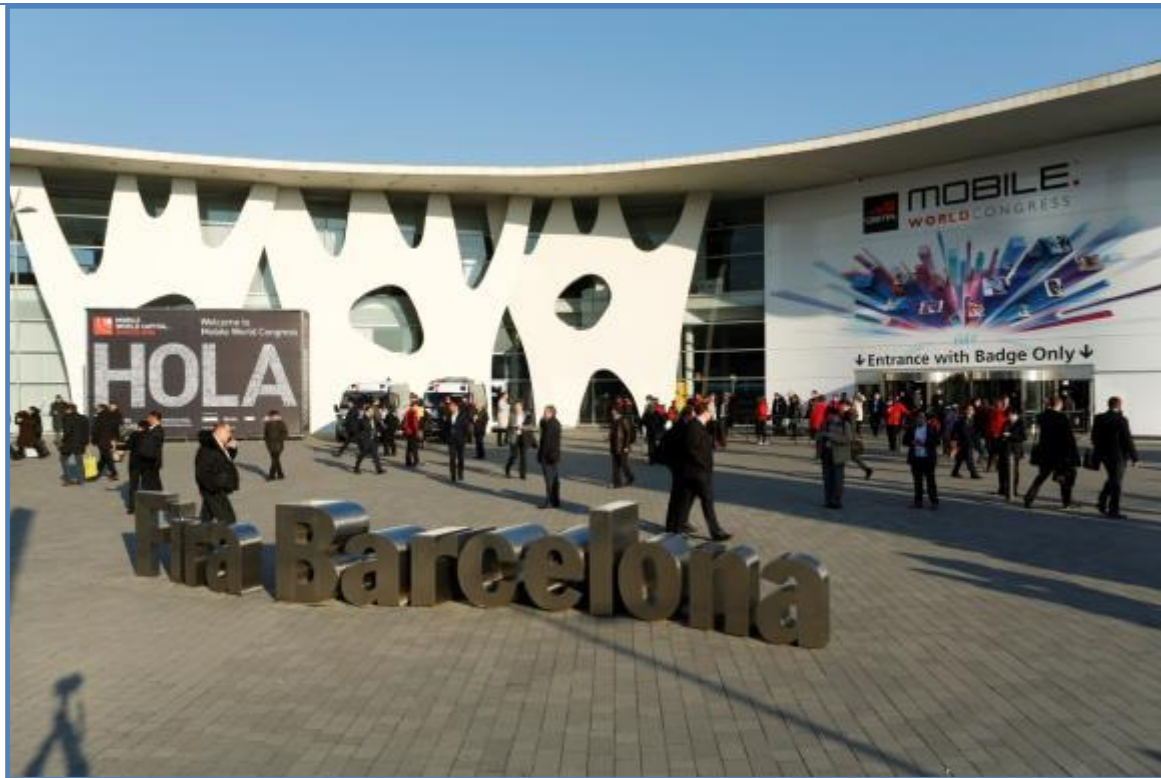




2013 Report



GSMA Mobile World Congress 2013, Fira Gran Via



27 March 2013

Dear Colleague,

Thank you for making the 2013 GSMA Mobile World Congress a phenomenal success!

As evidenced by our third consecutive year of record-breaking attendance, Mobile World Congress continues to be ***the place where industry leaders come to advance business***. This year 72,534 unique attendees participated in Mobile World Congress, including continued, unparalleled support amongst the C-suite of the world's leading companies. The seniority of attendees at MWC remained impressive with over 4,300 CEOs, a 20% increase from 2012, and 57% Senior-Level attendees.

During the event, leaders from mobile operators such as AT&T, Bharti Airtel, China Mobile, Deutsche Telekom, KT Corp, NTT DoCoMo, QTel Group, Telecom Italia, Telefónica, and Vodafone, and senior executives from consumer and technology brands such as Dropbox, Ericsson, foursquare, General Motors, Nokia, and Qualcomm among others, gathered to address key developments in the mobile ecosystem and shared their goals of defining the New Mobile Horizon.

The 2013 Congress was strengthened by the move to Fira Gran Via and featured more than 1,700 exhibiting companies occupying more than 94,000 square metres of net exhibition and hospitality space, providing opportunities for attendees to meet, network and examine the latest industry trends. In addition, a record 3,482 international print, web and broadcast media attended the event to analyse and report on the many significant industry announcements made at Congress.

Mobile World Congress continued diversifying with several featured programmes. The first ever NFC Experience provided attendees the opportunity to use NFC supported devices to enter the venue with the Virtual Badge, purchase refreshments through NFC capable point of sale terminals and find venue and local information through smart poster tags. The event also supported 35 sessions supporting our continuing App Planet, mPowered Brand and partner programmes.

As our Mobile World Capital, Barcelona was once again a wonderful host city for Mobile World Congress. We acknowledge and thank the city, Catalonia, Fira Gran Via and our Barcelona partners for being such warm and efficient hosts. We would also like to thank our numerous sponsors and partners for their continued support.

We look forward to welcoming you again to Barcelona at Fira Gran Via on 24-27 February for Mobile World Congress 2014.

Warm regards,

A handwritten signature in black ink, appearing to read 'John Hoffman', with a horizontal line extending to the right.

John Hoffman
CEO, GSMA Limited

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1. Snapshot: Record breaking attendance, participation

- **Unmatched quality of attendees: C-Level/VP/Board/Directors represented 57% of all attendees and 73% of all conference attendees**
- **72,534 attendees through the door, an 8% increase from 2012**
- **10,443 conference attendees**
- **Strong media involvement: 3,482 Media/Press attendees**
- **Demonstrated commitment by Operators: 13% of attendees**
- **Global participation: 202 countries in attendance from all regions of the world**

Category	Attendance 2013	Attendance 2012	Attendance 2011
Total Attendees	72,534	67,176	60,361
Total Senior Level Attendees (%)	57%	57%	58%
Total Senior Level Conference Attendees (%)	73%	75%	77%
Total Countries Represented	202	205	200

- **Unparalleled roster of speakers sharing their views of the future of the mobile industry: 271 speakers, over 41 sessions, including the following outstanding keynote speakers:**

- | | |
|--|--|
| <ul style="list-style-type: none"> ▪ Franco Bernabè, Chairman, GSMA & Chairman & CEO Telecom Italia Group ▪ Nancy Brown, CEO, American Heart Association ▪ Chet Kapoor, CEO, Apigee ▪ Randall Stephenson, President and CEO, AT&T ▪ Manoj Kohli, MD and CEO (Intl), Bharti Airtel Ltd ▪ Xi Guohua, Chairman, China Mobile ▪ Peter Bale, GM, CNN Digital ▪ Axel Dauchez, CEO, Deezer ▪ René Obermann, CEO, Deutsche Telekom ▪ Drew Houston, Founder and CEO, Dropbox ▪ Hans Vestberg, President and CEO, Ericsson ▪ Dennis Crowley, Founder & CEO, Foursquare ▪ Stephen Girsky, Vice-Chairman, GM ▪ Marc Dillon, CEO, Jolla ▪ Kevin Johnson, CEO, Juniper Networks ▪ Suk-Chae Lee, CEO, KT Corp ▪ Mitchell Baker, Chairman, Mozilla ▪ Gary Kovacs, CEO, Mozilla ▪ Susan Whiting, Vice Chair, Nielsen ▪ Stephen Elop, President & CEO, Nokia | <ul style="list-style-type: none"> ▪ Kaoru Kato, President & CEO, NTT DOCOMO ▪ Dr Nasser Marafih, Group CEO, Qtel Group ▪ Dr Paul Jacobs, Chairman & CEO, Qualcomm ▪ César Alierta, Executive Chairman & CEO, Telefonica ▪ Paul Gunning, CEO, Tribal DDB Worldwide & Global Chief Digital Officer, DDB ▪ Talmon Marco, Founder and CEO, Viber Media ▪ Vittorio Colao, Chief Executive, Vodafone |
|--|--|



Franco Bernabè, Chairman, GSMA, Chairman and CEO, Telecom Italia during his keynote address

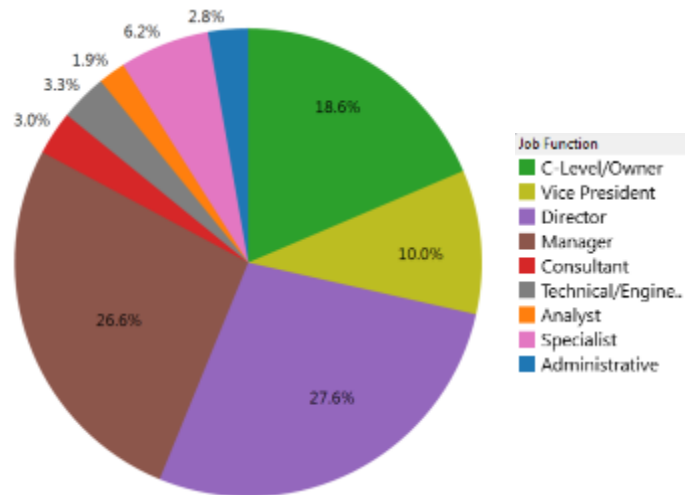
2. Attendees: Decision Makers from Around the World

- **Continued growth among senior-level attendees**

Mobile World Congress continues to offer thought-provoking content and foster networking opportunities which are desirable for senior-level attendees. Senior management (director level and higher) attendance was 57%, keeping consistent with our totals from 2012. Our move to Fira Gran Via enabled us to increase the actual number of attendees beyond our 2012 totals including over 4,300 CEOs, a 20% increase from 2012. Quality of attendees continues to increase year over year:

All Attendees by Job Function

Job Function	2013	2012	2011
C-Level/Owner	19%	23%	20%
Vice President	10%	9%	10%
Director	28%	25%	28%
Sub-Total C-Level / Board / VP / Director	57%	57%	58%
Technical/Engineer	3%	7%	8%
Manager	27%	28%	26%
Consultant	3%	3%	3%
Other	10%	5%	5%
Total	100%	100%	100%



Attendees take the opportunity to network on the exhibition floor

- **Three years of over 10,000 Operator Attendees**

While Mobile World Congress has diversified in recent years to attract new industries including new verticals, consumer brands, and developers, the commitment of the mobile operator community remains as strong and core to the evolution of the event. More than 10,000 attendees (13%) represented the operator community at Mobile World Congress. Although the percentage of attendees from operators has decreased, the actual number of attendees remained consistent with 2011 and 2012. Industries showing increases in attendees include Application and Software Developers, Financial Institutions, OSS/Billing and Test Vendors, and Government and Regulatory groups. In addition, 2013 marked a large increase for emerging industries, identified in the table as 'Other,' such as Biotechnology, Pharmaceuticals, Automotive, and Education that do not individually rank high but collectively show the increasing popularity of the mobile ecosystem.

All Attendees by Company Type

Company Main Activity	2013	2012	2011
Mobile, Fixed, and Virtual Network Operator	13%	16%	20%
Device, Wireless Components & IT/Hardware	17%	19%	21%
App and Software Development Vendor	10%	8%	7%
Network Infrastructure Vendor	9%	10%	11%
Service Provider	6%	7%	6%
Finance/Banking/Venture Capital	5%	3%	3%
Government/Regulatory/Association	4%	3%	3%
Mobile Content Provider	3%	3%	4%
Systems Integrator	3%	3%	3%
OSS/Billing and Test/Measurement vendors	3%	1%	1%
Integrated Solution Vendor (Software Only)	3%	2%	2%
Broadcast/Media	2%	3%	3%
Value-Added Reseller	2%	1%	1%
Other	20%	7%	7%
Total	100%	100%	100%



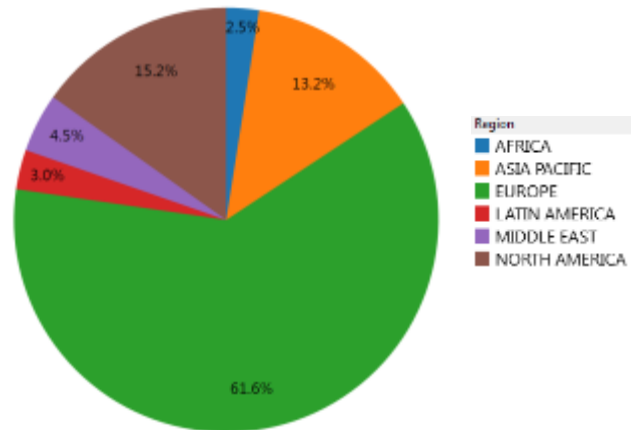
The Connected City featured real-life demonstrations of cutting edge connected devices.

- ***A Truly Mobile World: More than 200 Countries Represented***

The Congress attendance geographical breakdown remains relatively constant year over year. Mobile World Congress continues to attract a global audience with 202 countries represented in 2013. Once again, Europe is the most represented region with 62% of attendees, followed by North America and Asia Pacific.

All Attendees by Region

Region	2013	2012	2011
Europe	62%	61%	60%
North America	15%	15%	15%
Asia Pacific	13%	14%	14%
Middle East	5%	5%	5%
Africa	2%	2%	3%
Latin America	3%	3%	3%
Total	100%	100%	100%



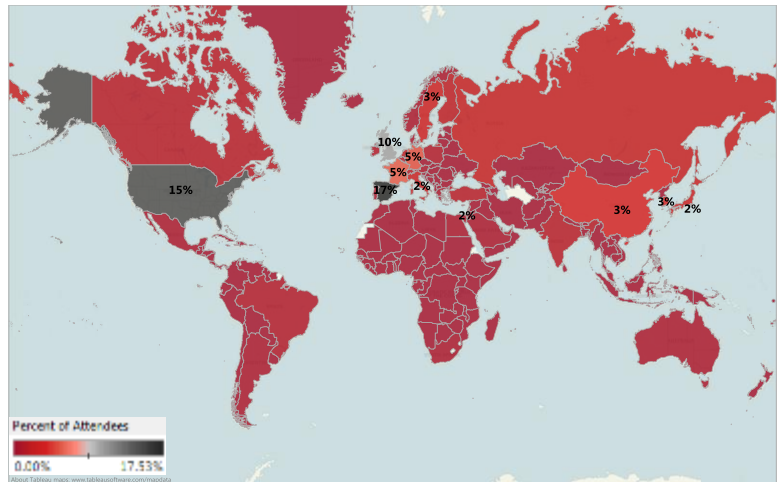
1,700 Exhibitors participating at Mobile World Congress 2013

- **Top 10 Countries**

The top 10 countries represented at Mobile World Congress continue to remain constant over the years. In 2013 the top 10 countries remain the same, with Israel, Italy and Japan in the 9th spot. Overall four of the six geographic regions continue to be represented in the top 10 countries.

Attendees' Top 10 Countries

Countries	2013	2012	2011
Spain	17%	18%	17%
United States	15%	14%	13%
United Kingdom	10%	12%	12%
France	5%	5%	6%
Germany	5%	5%	6%
South Korea	3%	3%	3%
China	3%	4%	3%
Sweden	3%	2%	3%
Italy	2%	2%	3%
Japan	2%	2%	1%
Israel	2%	2%	2%
Total	67%	68%	69%



Attendees get a demonstration of the latest products and trends in the industry

3. Conference Attendees:

- **Operators Develop Thought Leadership for a Diverse Audience**

The Operator community shows its strength and thought-leadership of the mobile industry through its participation in the conference programme (26% of conference attendees). The conference attendees exemplified the diversification on the industry with growth represented in the 'Other' category coming from industries not in the top 10, such as Education, Automotive, and Healthcare.

Conference Attendees by Company Type

Company Main Activity	2013	2012	2011
Mobile, Fixed, and Virtual Network Operator	26%	29%	34%
Government/Regulatory/Association	13%	14%	13%
App and Software Development Vendor	9%	13%	10%
Device, Wireless Component, and IT/Hardware Manufacturer	8%	9%	10%
Finance/Banking/Venture Capital	7%	8%	5%
Advertising and Marketing	6%	3%	2%
Service Provider	6%	7%	6%
Network Infrastructure Vendor	4%	4%	5%
Mobile Content Provider	2%	3%	4%
Broadcast/Media	2%	3%	4%
Integrated Solution Vendor (Software Only)	2%	2%	2%
Systems Integrator	2%	3%	2%
OSS/Billing and Test/Measurement Vendor	2%	2%	1%
Other	10%	6%	4%
Total	100%	100%	100%



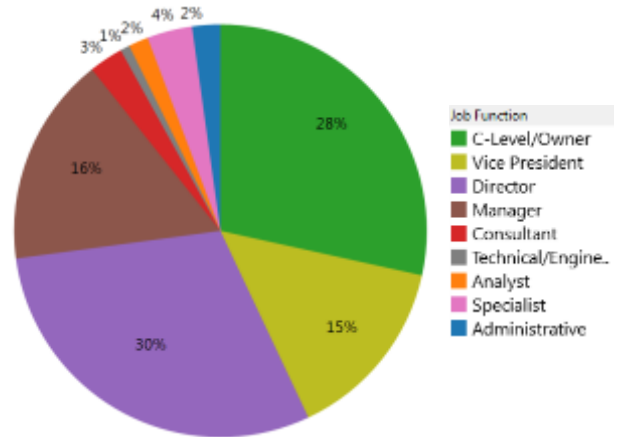
Attendees making new connections at Mobile World Congress

- **Continuing Trend of High Seniority (73%)**

Consistent with previous years, conference attendees tend to be more senior (73% C-Level) than the overall attendees (57% C-Level) and we saw a continuing trend of strong senior-level participation in the conference with four straight years of more than 70% senior level participation.

Attendees by Job Function

Job Function	2013	2012	2011
C-Level/Owner	28%	33%	33%
Vice President	15%	13%	16%
Director	30%	28%	28%
Sub-Total C-Level / Board / VP /	73%	75%	77%
Manager	16%	3%	14%
Technical/Engineer	1%	16%	2%
Consultant	3%	3%	2%
Other	7%	5%	5%
Total	100%	100%	100%



Mark Shuttleworth, Founder, Ubuntu, Mitchell Baker, Chairman, Mozilla and Mark Dillon, CEO, Jolla discuss the next generation of mobile operating systems during the Mobile World Live keynote address



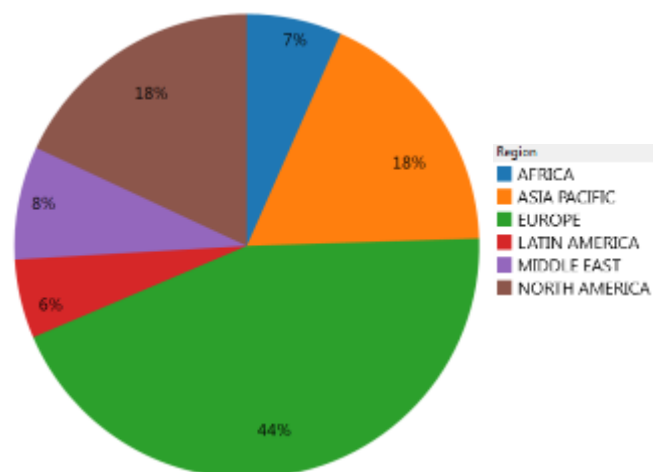
Ecosystem leaders enjoy the conference sessions

- **Conference Attendees Diversifying and growing**

As with Mobile World Congress attendees overall, the geographical profile of conference attendees was stable in comparison to 2012, with a slight decrease in North American attendees as a percentage of the total. Of note this year was an increase of conference attendees by 1,000 total attendees, the third consecutive year of significant increases in total attendance.

Conference Attendees by Region

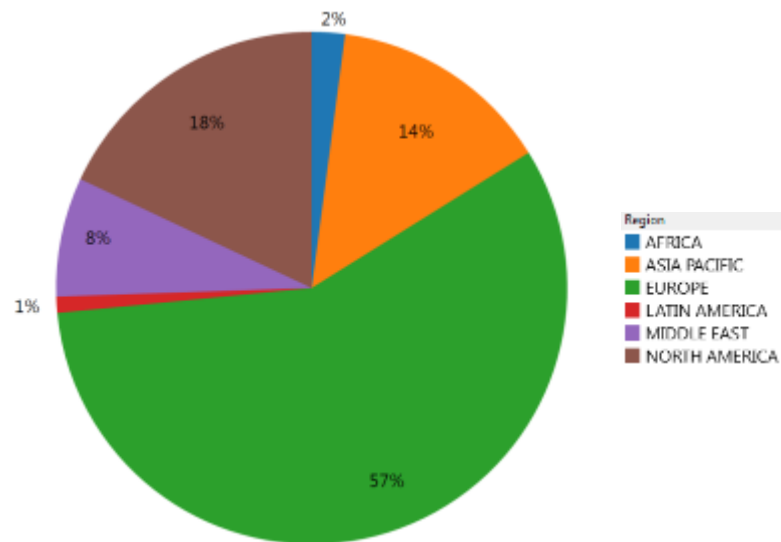
Region	2013	2012	2011
Europe	44%	43%	44%
North America	18%	20%	18%
Asia Pacific	18%	17%	17%
Middle East	8%	8%	9%
Africa	7%	6%	6%
Latin America	6%	6%	6%
Total	100%	100%	100%



4. Exhibition

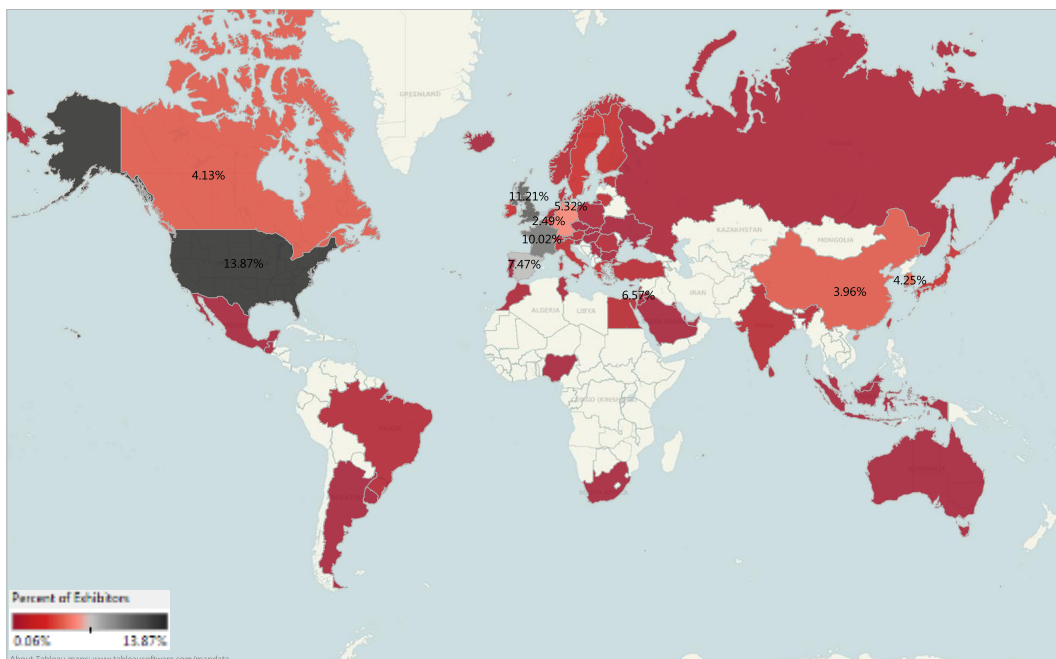
- **MWC: A world-wide exhibition**

Exhibitors at Mobile World Congress came from 66 countries, consistent with 2012. Europe remains the largest region with 57% of exhibitors, with North America and Asia completing the top three regions, which is in line with the geographies of the attendee population.



- **Top 10 Countries**

Exhibitors' top 10 countries are similar to those of attendees, with the United States providing the most exhibitors of any country. Canada and Belgium are the only top 10 Exhibitor countries that are not also in the top 10 of attendees.



- ***Exhibitors represent a wide spectrum of the mobile ecosystem***

Companies and organisations exhibiting in 2013 represented all facets of the industry. The Top 100 exhibitors utilised over 68,000 square meters of space.

Top 100 Exhibitors*

- | | | |
|---|---|--|
| <ul style="list-style-type: none"> • Accenture • Acer Europe S.A • Acision Nederland B.V • ACCIÓ • AirWatch, LLC. • ALCATEL One Touch • Alcatel-Lucent International • AMD Telecom S.A. • Amdocs Management Limited • ams AG • ASUS Technology PTE. LTD • AT&T • Belgium-Belgica • Bharti Airtel Limited • Brightstar Corp. • Broadcom Corporation • China Mobile • Ciena • Cisco Systems, Inc • Citrix Systems, Inc. • Comverse • Deutsche Telekom AG • Dolby Europe Ltd • eBay Inc • Emitac Mobile Solutions LLC • Emporia Telecom Produktions • Entre Marketing Ltd • Ericsson • Etisalat • Facebook • Ford Motor Company Ltd • France Telecom/Orange • French Pavilion/Ubifrance • Fujitsu • Gemalto S.A. • GENBAND, Inc. • Giesecke & Devrient GmbH • Golla Oy | <ul style="list-style-type: none"> • Government of Canada • Hewlett-Packard Company • HTC Europe Co Ltd • Huawei Technologies Co Ltd • IBM • Israel Mobile & Communication Assoc • Imagination Technologies Ltd. • Ingram Micro Mobility • Intel Corporation • Israel Export Institute & International Cooperation Institute • Japan External Trade Organization • Juniper Networks • Korea Trade-Investment Promotion Agency • KT Corporation • LG Electronics Inc • Marvell UK Ltd • MasterCard Worldwide • Maxim Integrated Products, Inc. • Mobile World Capital • Motorola Mobility, Inc. • Mozilla • NEC Corporation • Nokia Siemens Networks S.L. • Nokia • NRW International • NTT DOCOMO, INC. • Nvidia Ltd • NXP Semiconductors Netherlands B.V. • Oberthur Technologies • Opera Software • ORACLE | <ul style="list-style-type: none"> • Orga Systems GmbH • Powermat Ltd • Qtel Group LLC • Qualcomm Incorporated • Renesas Mobile Corporation • Rohde & Schwarz • Ruckus Wireless • Samsung Electronics Co Ltd • Samsung Semiconductor Europe GmbH • SanDisk Corporation • SAP AG • Secretaria de Estado de Telecomunicaciones y para la Sociedad de la Informacion Ministerio de Industria, Energía y Turismo • SK Telecom • Sony Mobile Communications AB • ST-Ericsson SA • Synchronoss Technologies, Inc. • Syniverse Technologies, Inc • Tech Data Mobile Ltd • TeleCommunication Systems Inc • Telefonica S.A. • Telenor ASA • Telit Communications • Tellabs • Trade Fair Ltd • TriQuint Semiconductor • Velti PLC • VIMPELCOM • Visa • Vodafone Espana • Zain • ZTE Corporation |
|---|---|--|

*Top exhibitors by square meters purchased, listed alphabetically

5. Press Highlights

3,482 Press/Media members attended Mobile World Congress, representing over 1,500 media groups from 79 countries.

Media Attendees per Region

Region	2013	2012	2011
Europe	77%	78%	78%
Asia Pacific	9%	9%	8%
North America	8%	7%	8%
Latin America	3%	3%	3%
Middle East	2%	1%	2%
Africa	1%	1%	1%
Total	100%	100%	100%

Mobile World Congress 2013 Media Highlights:



Wireless show expected to draw crowds to Barcelona

By By PETER SVENSSON, AP Technology Writer – Feb 22, 2013

When the top executives of the world's wireless industry gather next week in Barcelona for their annual trade show, cellphones will take a back seat to talk of cars, electric meters and insulin monitors.

That idea of empowering new devices with wireless connections has been percolating for years. General Motors cars have had wireless OnStar connections for more than a decade. But the push is intensifying now that most people have cellphones —and the wireless industry's future growth depends on it. At the GSM Mobile World Congress, the telecommunications industry's biggest trade show, will be abuzz with discussion of devices like "smart"

WSJ TECH EUROPE

February 27, 2013, 1:38 PM
The Internet-Connected Car



Sam Schechner
Staff Reporter, The Wall Street Journal

BBC NEWS

England, N. Ireland, Scotland, Wales, Business, Politics, Health, Education, Science

Can pupils respect 'teacher on wheels'?



27 February 2013 Last updated at 00:58

Wireless, remote conferencing has become something of a growth area, with some developers even experimenting with robots to add physical element to the proceedings

show at Mobile World Congress in Barcelona this year was a simple type of robot designed to help teachers to educate from long-distance, harnessing wireless technology

Plus-sized phones dominate wireless trade show

Rob Pegararo, Special for USA TODAY | 2:30p.m. EST February 27, 2013



BARCELONA — The annual wireless industry show happening here this week is called Mobile World Congress, but it could also be fairly accurately called the Android Market.



THE WALL STREET JOURNAL | TECH

MWC Trials NFC Admissions



BARCELONA—One of the least elegant phrases surrounding technology is "to eat your own dog food", the idea that companies should use their own products and services.

FT

FT BUSINESS BY COMPANIES
Connected life - everything becomes 'smart'
Feb 20 2013 Mobile connectivity is already changing how we live, a fact being shown like never before at this year's Mobile World Congress in Barcelona. Daniel Thomas, telecoms correspondent, reports on how the industry's biggest companies are changing the world. (in 3746)

Bloomberg TELEVISION

70K People Head to Mobile World Congress
BARCELONA 3RD M...
Bloomberg 95...
1:44 ET KARZAI C...
FEB 23 FORCES OU...
70K PEOPLE HEAD TO MOBILE WORLD CONGRESS

NEWSBEAT

Page 100 columns in 00:00:00, Tuesday, 5 March 2013

Could your mobile ever really replace your wallet?

By Ben Fisher
Financial reporter in Barcelona

It's called MWC, or Mobile World Congress, and you might have never heard of it.

But several of the world's biggest mobile companies have held their annual MWC and committed to the technology, which lets you use your phone to buy things.

MWC could one day see your mobile replace your wallet and even your bank.

Although it's been around for several years, the technology hasn't caught on in the UK yet.

See our related stories:
- Your children: Mobile penetration need to be healthy
- The number of queries about the UK has risen and the government is not making them fun to be a crap priority.
- Is anyone else a little bit worried?
- An Android update: I found progress for a new mobile handset but it has to be in Android.
- Microsoft will say it's Windows 8
- The number of apps captured online, along with mobile adoption, are a problem and a challenge.
- Time to get Windows 8
- There is a lot of talk of it and it will take the time to build independence as being successful.
- Microsoft's push to the Windows 8

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