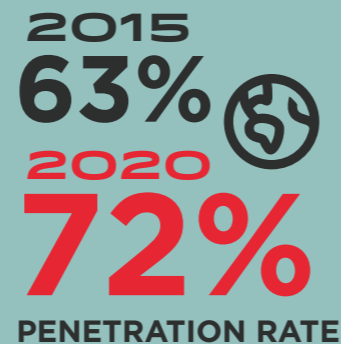
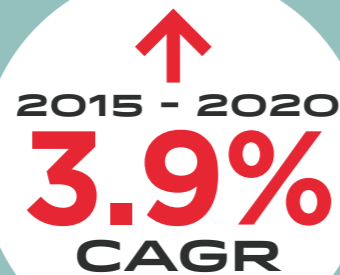
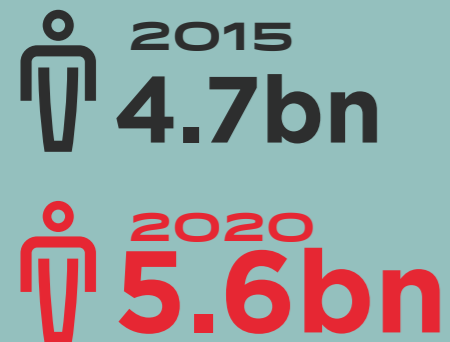
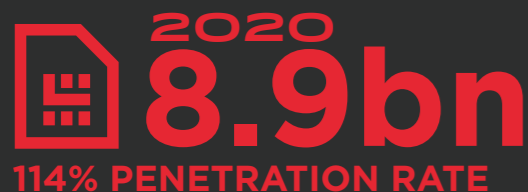
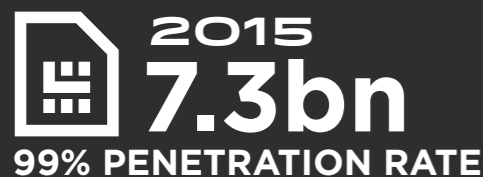


GLOBAL MARKET

UNIQUE SUBSCRIBERS



GLOBAL CONNECTIONS*



*EXCLUDING M2M

MOBILE OPERATOR REVENUES

Data growth driving revenues and operator investments



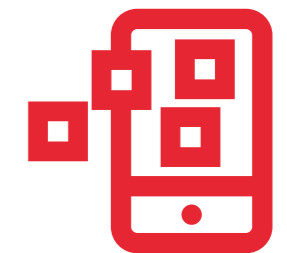
MOBILE CONTRIBUTING TO ECONOMIC AND SOCIAL DEVELOPMENT ACROSS THE WORLD



Delivering digital inclusion to the still unconnected populations
Mobile internet penetration
2015: 44%
2020: 60%



Delivering financial inclusion to the unbanked populations
270 live services in 90 countries as of December 2015



Delivering innovative new services and apps
Number of M2M connections to reach **1bn by 2020**

MOBILE INDUSTRY CONTRIBUTION TO GDP



PUBLIC FUNDING

Mobile ecosystem contribution to public funding (before regulatory and spectrum fees)



EMPLOYMENT

Jobs directly supported by mobile ecosystem



Plus an additional 16M indirect jobs supported by 2020

ACCELERATING MOVES TO MOBILE BROADBAND NETWORKS AND SMARTPHONE ADOPTION

Mobile broadband connections to increase from 47% of total in 2015 to
71% by 2020

By 2020, there will be
5.8bn smartphones, growth of 2.6bn from the end of 2015

Data traffic to grow by a CAGR of
49% over the period 2015-2020