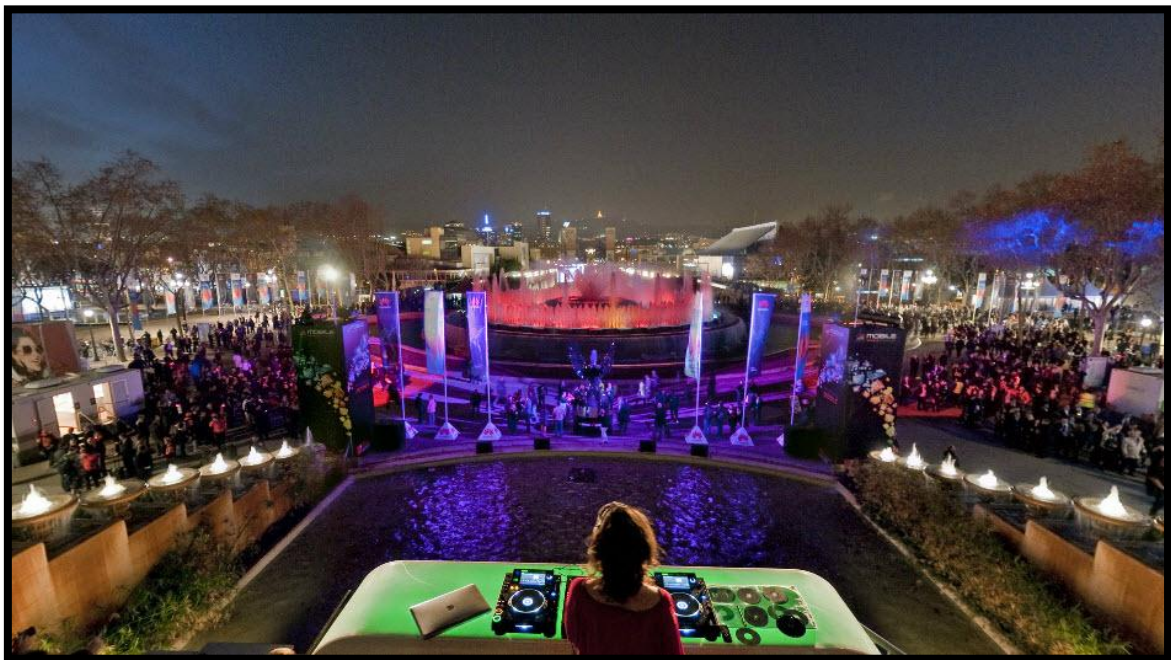




MOBILETM
WORLD CONGRESS

2012 Report



GSMA Mobile World Congress 2012, Fira Montjuïc



27 March 2012

Dear Colleague,

Thank you for making the 2012 GSMA Mobile World Congress a tremendous success!

As evidenced by our second consecutive year of record-breaking attendance, Mobile World Congress continues to be **the place where industry leaders come to advance business**. This year 67,176 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 3,500 CEOs and 57% Senior-Level attendees.

During the event, leaders from mobile operators such as AT&T, China Mobile, Deutsche Telekom, Sprint-Nextel, Telecom Italia, Telefónica, Telenor, VimpelCom, and Vodafone, and senior executives from consumer and technology brands such as Alcatel-Lucent, Cisco, Citi, Ericsson, Ford, foursquare, Google, HTC, Huawei, Nokia, Samsung, Visa and ZTE, among others, gathered to address key developments in the mobile ecosystem and shared their goals of redefining mobile and creating a connected economy.

The 2012 Congress featured more than 1,500 exhibiting companies and occupied more than 73,000 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 3,380 international print, web and broadcast media attended the event to analyse and report on the many significant industry announcements made at Congress.

Now in its third year, App Planet was again a tremendous success with over 12,500 members from the developer community attending the exhibition, networking opportunities and application developer conferences. New developments at Mobile World Congress included mPowered Brands and the Mobile Youth Forum. mPowered Brands featured more than 1,600 attendees from 200 consumer brands discovering opportunities to succeed in the mobile connected economy. The Mobile Youth Forum, a programme which demonstrated to students how mobile can transform their lives - particularly in the area of education - attracted more than 100 students from the Barcelona area.

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 Montjuïc 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 our new venue, Fira Gran Via on 25-28 February for Mobile World Congress 2013.

Warm regards,

A handwritten signature in black ink, appearing to read 'John Hoffman', written over a horizontal line.

John Hoffman
CEO, GSMA Limited

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1. Snapshot: Record attendance, double digit growth

- **Unmatched quality of attendees: C-Level/VP/Board/Directors represented 57% of all attendees and 75% of all conference attendees**
- **67,176 attendees through the door, a 12% increase from 2011**
- **9,660 conference attendees**
- **Strong media involvement: 3,380 Media/Press attendees**
- **Demonstrated commitment by Mobile Operators: 16% of attendees**
- **Global participation: 205 countries in attendance from all regions of the world**

Category	Attendance 2012	Attendance 2011	Attendance 2010
Total Attendees	67,176	60,361	49,154
Total Senior Level Attendees (%)	57%	58%	54%
Total Senior Level Conference Attendees (%)	75%	77%	72%
Total Countries Represented	205	200	194

- **Unparalleled roster of speakers sharing their visions about the future of the mobile industry: 273 speakers, over 44 sessions, including the following outstanding keynote speakers:**

- Ben Verwaayen, CEO, Alcatel-Lucent
- Warren East, CEO, ARM
- Ralph de la Vega, President & CEO Mobility, AT&T
- Brian Dunn, CEO, Best Buy Company Inc.
- Sunil Mittal, Chairman & MD, Bharti Airtel
- Li Yue, President, China Mobile
- John Chambers, Chairman & CEO, Cisco
- Don Callahan, Chief Administrative Officer, Chief Operations & Technology Officer, Citi
- René Obermann, Chairman & CEO, Deutsche Telekom
- John Donahoe, President & CEO, eBay
- Hans Vestberg, President & CEO, Ericsson
- Bill Ford Jr., Executive Chairman, Ford
- Dennis Crowley, CEO, foursquare
- Dr Eric Schmidt, Executive Chairman, Google
- Anne Bouverot, Director General, GSMA
- Franco Bernabè, Chairman of GSMA Chairman & CEO, Telecom Italia Group
- Peter Chou, CEO, HTC
- Michael Roth, Chairman & CEO, IPG
- Michael Abbott, CEO, ISIS
- Kevin Johnson, CEO, Juniper Networks



Anne Bouverot, Director General, GSMA, during her keynote address

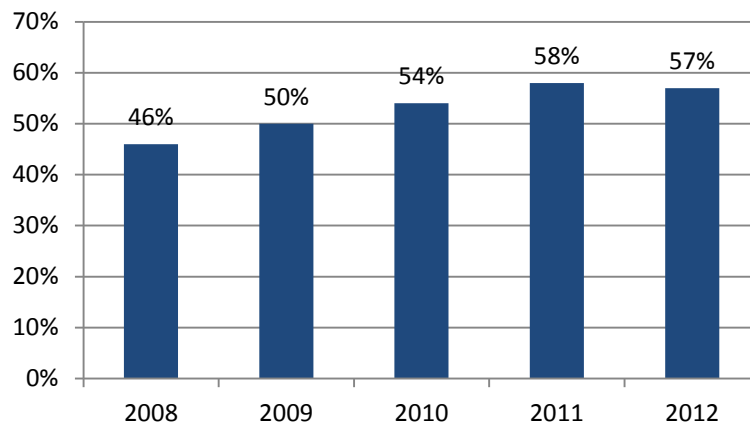
- Stephen Elop, President & CEO, Nokia
- Kristin Skogen Lund, EVP, Head of Digital Services & Nordic, Telenor
- John Partridge, President, Visa Inc.
- Dan Hesse, CEO, Sprint Nextel Corporation
- Santiago Fernández Valbuena, Chairman & CEO, Telefónica Latin America
- Jo Lunder, CEO, VimpelCom
- Vittorio Colao, Chief Executive, Vodafone
- Shi Lirong, President, ZTE

2. Attendees: Decision Makers from Around the World

- **Five Consecutive Years of growth among senior-level attendees**

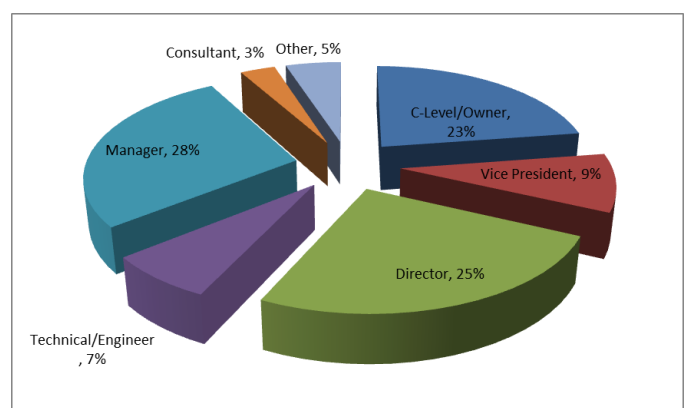
Mobile World Congress continues to offer thought-provoking content and foster networking opportunities which are desirable for senior-level attendees. Senior management (director level and higher) attendance was 57%, keeping consistent with our totals from 2012. Both the actual number and the quality of attendees remained high again in 2012 including over 3,500 CEOs, a 12% increase from 2011. Quality of attendees continues to increase year over year:

Senior Management Attendance over the Last Five Years



All Attendees by Job Function

Job Function	2102	2011	2010
C-Level/Owner	23%	20%	18%
Vice President	9%	10%	10%
Director	25%	28%	26%
Sub-Total C-Level / Board / VP / Director	57%	58%	54%
Technical/Engineer	7%	8%	7%
Manager	28%	26%	31%
Consultant	3%	3%	4%
Other	5%	5%	4%
Total	100%	100%	100%

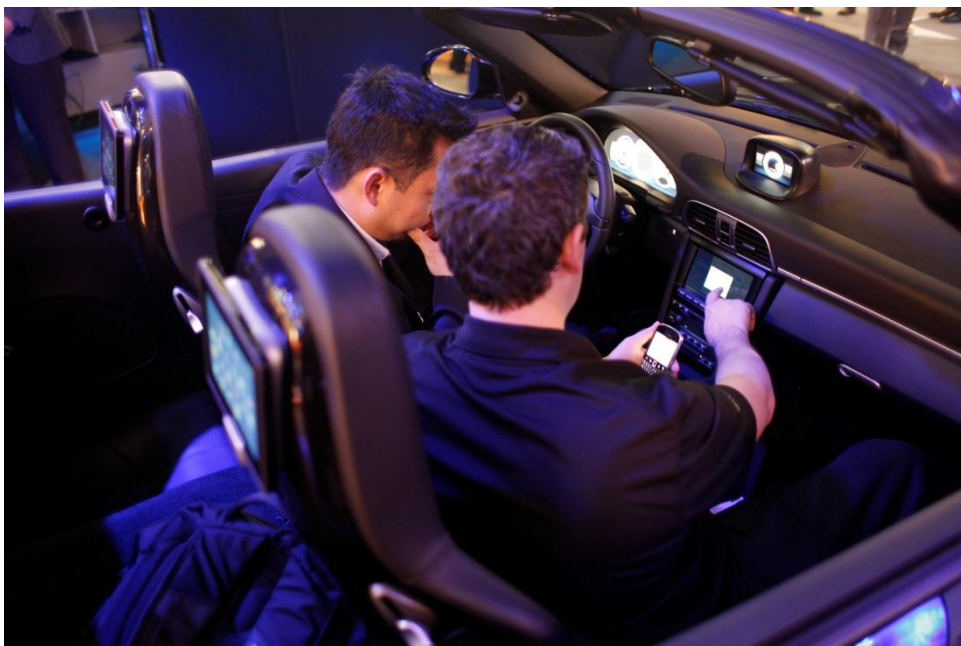


- ***Operator Participation Strong – Balanced by diversification of attendees***

While Mobile World Congress has diversified in recent years to attract application developers, new verticals and more consumer brands, the commitment of the mobile operator community remains as strong and core to the evolution of the event. More than 10,000 attendees (16%) represented the operator community at Mobile World Congress. Industries showing increases in attendees include Application Developers, Software Development Vendors and Financial Institutions.

All Attendees by Company Type

Company Main Activity	2012	2011	2010
Mobile, Fixed, and Virtual Network Operator	16%	20%	20%
Device, Wireless Components & IT/Hardware	19%	21%	21%
Network Infrastructure Vendor	10%	11%	11%
Software Development Vendor	8%	7%	7%
Service Provider	7%	6%	6%
Mobile Content Provider	3%	4%	4%
Application Development	10%	8%	8%
Systems Integrator	3%	3%	3%
OSS/Billing and Test/Measurement vendors	3%	1%	1%
Broadcast/Media	3%	3%	3%
Finance/Banking/Venture Capital	4%	3%	3%
Government/Regulatory/Association	4%	3%	3%
Integrated Solution Vendor (Software Only)	2%	2%	2%
Value-Added Reseller	1%	1%	1%
Other	6%	7%	7%
Total	100%	100%	100%



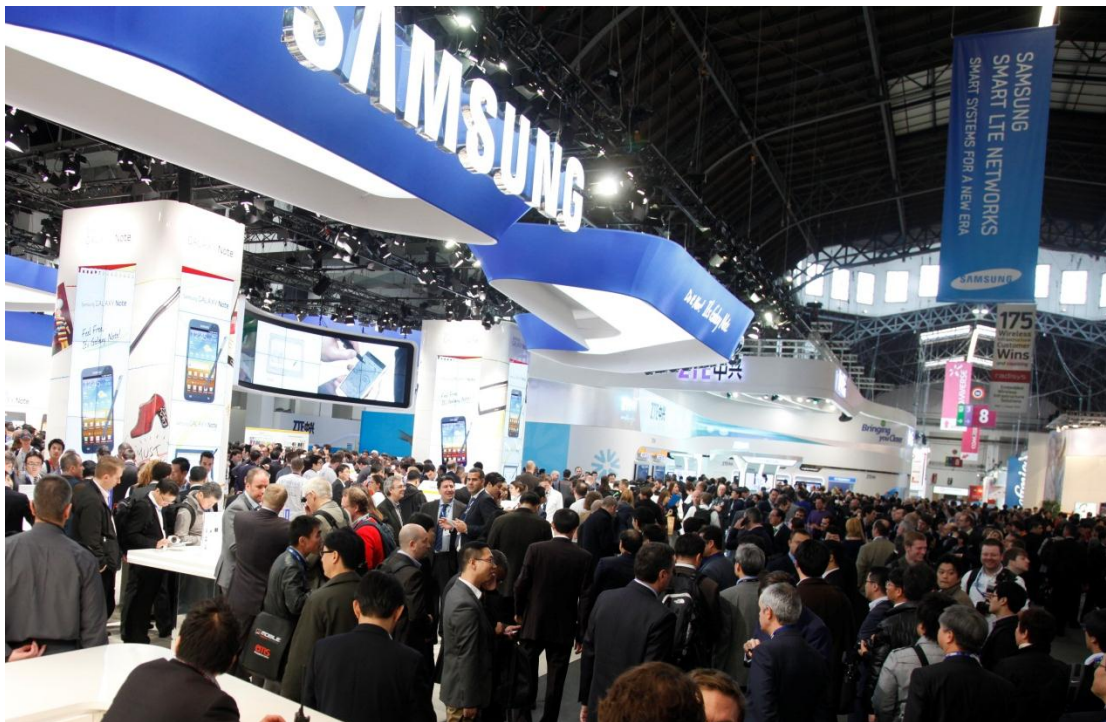
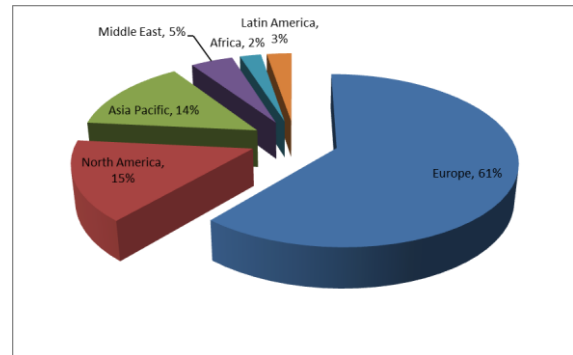
Connected Devices featured prominently in both the exhibition and in the Conference

- ***A Mobile World: 200 Countries Represented***

The Congress attendance geographical breakdown remains relatively constant year over year. Mobile World Congress continues to attract a global audience with 205 countries represented in 2012, an increase of 5 countries from 2011. Once again, Europe is the most represented region with 61% of attendees, followed by North America and Asia Pacific.

All Attendees by Region

Region	2012	2011	2010
Europe	61%	60%	62%
North America	15%	15%	15%
Asia Pacific	14%	14%	12%
Middle East	5%	5%	5%
Africa	2%	3%	3%
Latin America	3%	3%	3%
Total	100%	100%	100%



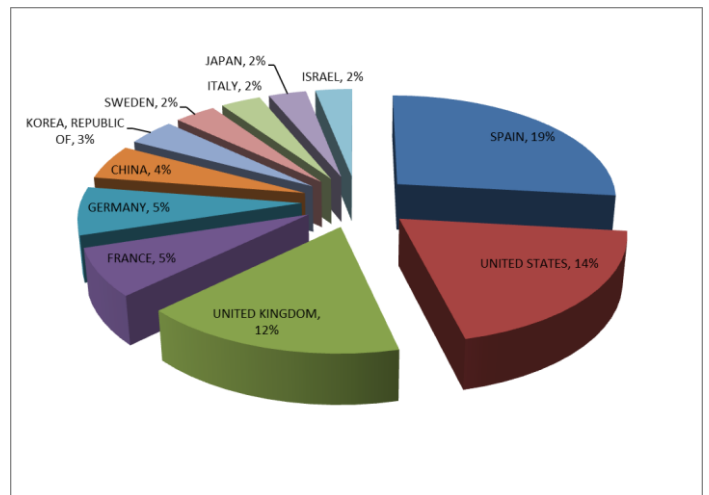
1,500 Exhibitors at Mobile World Congress

- **Top 10 Countries**

The top 10 countries represented at Mobile World Congress have remained relatively constant over the years. In 2012 the top 10 countries remain the same, however we have a tie at the 10th spot, adding Japan into the top 10 ranking. Overall four of the six geographic regions are represented in the top 10 countries.

Attendees' Top 10 Countries

Countries	2012	2011	2010
Spain	18%	17%	16%
United States	14%	13%	13%
United Kingdom	12%	12%	12%
France	5%	6%	7%
Germany	5%	6%	6%
China	4%	3%	3%
South Korea	3%	3%	3%
Sweden	2%	3%	4%
Italy	2%	3%	3%
Japan	2%	1%	2%
Israel	2%	2%	3%
Total	68%	69%	70%



Attendees browse the exhibition for the latest products and trends

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 (29% of conference attendees). We also saw a significant increase in participation from Software Development Vendors and Financial Institutions at this year's conference.

Conference Attendees by Company Type

Company Main Activity	2012	2011	2010
Mobile, Fixed, and Virtual Network Operator	29%	34%	33%
Government/Regulatory/Association	14%	13%	10%
Device, Wireless Component, and IT/Hardware Manufacturer	9%	10%	5%
Service Provider	7%	6%	7%
Network Infrastructure Vendor	4%	5%	6%
Software Development Vendor	7%	5%	5%
Finance/Banking/Venture Capital	8%	5%	3%
Applications Development	6%	5%	3%
Mobile Content Provider	3%	4%	5%
Broadcast/Media	3%	4%	6%
Integrated Solution Vendor (Software Only)	2%	2%	2%
Systems Integrator	3%	2%	2%
OSS/Billing and Test/Masurement Vendor	2%	1%	1%
Other	6%	4%	12%
Total	100%	100%	100%



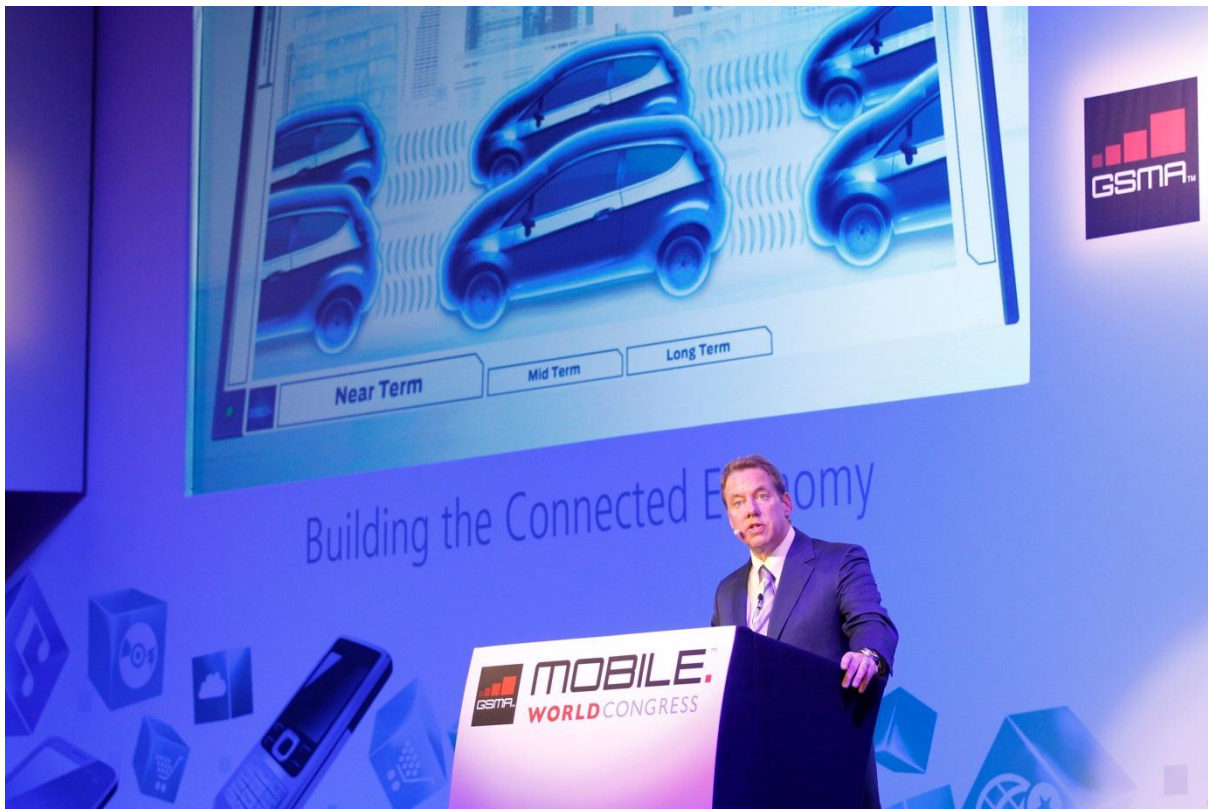
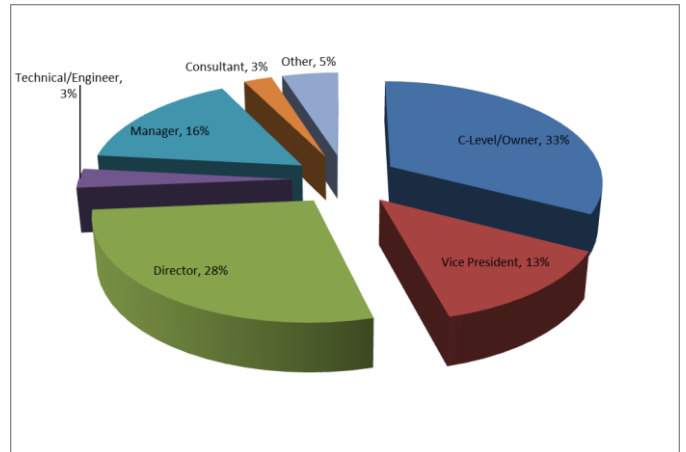
Attendees making new connections at Mobile World Congress

- **Continuing Trend of High Seniority (75%)**

As expected, conference attendees tend to be more senior (75% C-Level) than the overall attendees (57% C-Level) and we saw a continuing trend of strong senior-level participation in the conference with three straight years of more than 70% senior level participation.

Attendees by Job Function

Job Function	2012	2011	2010
C-Level/Owner	33%	33%	30%
Vice President	13%	16%	15%
Director	28%	28%	27%
Sub-Total C-Level / Board / VP /	75%	77%	72%
Manager	3%	14%	3%
Technical/Engineer	16%	2%	18%
Consultant	3%	2%	2%
Other	5%	5%	5%
Total	100%	100%	100%



Bill Ford Jr., Executive Chairman, Ford Motor Company, during his Mobile World Live keynote address



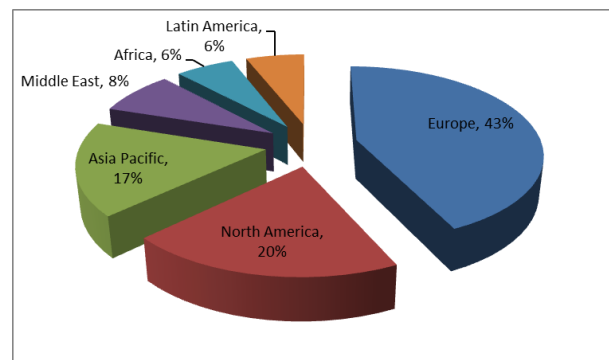
Ecosystem leaders enjoy the conference sessions

- **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 increase in North American attendees as a percentage of the total. Of not this year was an increase of conference attendees by 1,000 total attendees, the second consecutive year of significant increases in total attendance. Because of the growth of conference attendees in 2012, participation increased the actual number of attendees over 2011 for all regions, even for those regions where overall percentage decreased.

Conference Attendees by Region

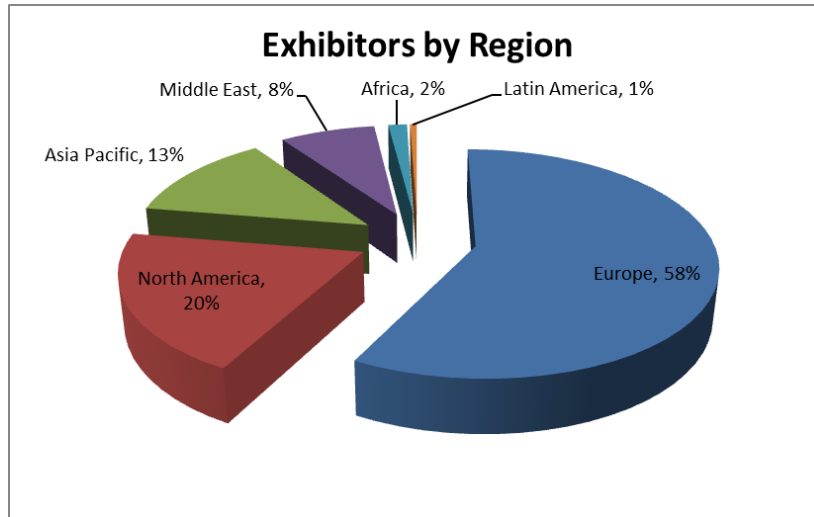
Region	2012	2011	2010
Europe	43%	44%	47%
North America	20%	18%	18%
Asia Pacific	17%	17%	15%
Middle East	8%	9%	8%
Africa	6%	6%	7%
Latin America	6%	6%	5%
Total	100%	100%	100%



4. Exhibition

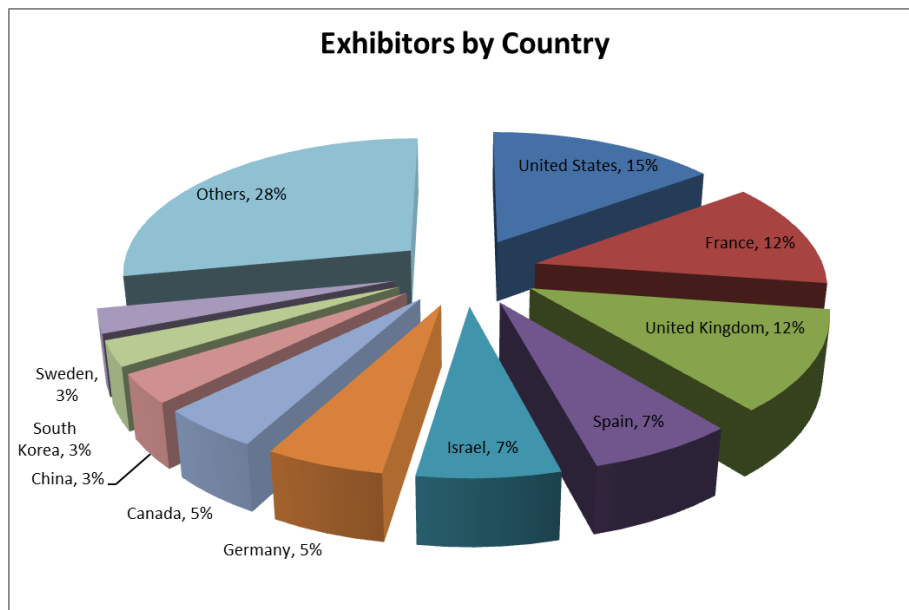
- **MWC: A world-wide exhibition**

Exhibitors at Mobile World Congress came from 69 countries, an increase of 10 from 2011. Europe remains the largest region with 58% 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 is the only top 10 Exhibitor country that was not also in the top 10 of attendees.



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

Companies and organisations exhibiting in 2012 represented all facets of the industry. The Top 100 exhibitors utilised over 50,000 square meters of space.

Top 100 Exhibitors*

- | | | |
|-----------------------------------|---|-----------------------------------|
| • Accenture | • Hewlett-Packard | • Oberthur Technologies |
| • ACC1Ó, Generalitat de Catalunya | • Hitachi, Ltd. | • Oracle |
| • Acision Nederland B.V | • HTC Europe Co Ltd | • Panasonic Mobile Communications |
| • ADOBE | • Huawei Technologies | • Powermat Ltd |
| • AirWatch | • IBM | • Powerwave Technologies |
| • ALCATEL One Touch | • ICEX, INSTITUTO ESPAÑOL DE COMERCIO EXTERIOR | • Qtel International |
| • Alcatel-Lucent | • IKT Norge | • Qualcomm Incorporated |
| • Amdocs Management | • IMA (Israel Mobile & Communication Assoc.) | • RealNetworks Inc |
| • Aptina | • Imagination Technologies | • Renesas Mobile Corporation |
| • ARM Limited | • INSIDE Secure | • Research In Motion |
| • AT&T | • Intel Corporation | • Rohde & Schwarz |
| • Belgium-Belgica | • Israel Export Institute & International Cooperation Institute | • Samsung Electronics |
| • Bharti Airtel | • Japan External Trade Organization | • Samsung Semiconductor |
| • Brightstar Corp. | • Juniper Networks | • SanDisk Corporation |
| • Broadcom Corp. | • Korea Trade-Investment Promotion Agency | • SAP AG |
| • Cambridge Silicon Radio Ltd | • LG Electronics Inc | • Sierra Wireless Inc. |
| • Cellular Italia Spa | • Marvell UK Ltd | • SK Telecom |
| • Ciena | • Maxim Integrated Products, Inc. | • ST-Ericsson SA |
| • Cisco | • MediaTek Inc. | • Symphony Teleca |
| • Comverse | • Microsoft Corp. | • Syniverse Technologies Inc |
| • Convergys | • Mobile World Capital | • Tekelec |
| • Dolby Laboratories | • Motorola Mobility | • TeleCommunication Systems Inc |
| • eBay Inc | • NEC | • Telefonica S.A. |
| • EMPORIA Telecom | • NeuStar Inc | • Telenor ASA |
| • Enterprise Ireland | • Nokia Corporation | • TeliaSonera AB |
| • Entre Marketing Ltd | • Nokia Siemens Networks S.L. | • Tellabs |
| • Ericsson SW | • NRW.International | • Texas Instruments |
| • Etisalat | • NTT DoCoMo, Inc | • Trade Fair Ltd |
| • Ford | • Nvidia Ltd | • TriQuint Semiconductor |
| • France Telecom/Orange | • NXP Semiconductors Netherlands B.V. | • VNL Europe AB |
| • French Pavilion/Ubifrance | | • Vodafone Group Services Ltd |
| • Fujitsu Limited | | • Zain |
| • Gemalto S.A. | | • ZTE Corporation |
| • Giesecke & Devrient | | |
| • Google Inc | | |
| • Government of Canada | | |
| • GSMA | | |

*Top exhibitors by square meters purchased, listed alphabetically

5. Press Highlights

3,380 Press/Media members attended Mobile World Congress, representing over 1,500 media groups from 92 countries.

Media Attendees per Region

Region	2012	2011	2010
Europe	78%	78%	81%
Asia Pacific	9%	8%	7%
North America	7%	8%	6%
Latin America	3%	3%	3%
Middle East	1%	2%	2%
Africa	1%	1%	1%
Total	100%	100%	100%

Mobile World Congress 2012 Media Highlights:

[Big Mobile Show Kicking Off in Barcelona, USA Today, February 26, 2012](#)

Barcelona becomes the center of the wireless universe beginning this weekend as more than 60,000 people descend upon the city for Mobile World Congress. Set within the atmospheric of a palace on a hill, the show is arguably the wireless industry's most important gathering of the year.

[Inside the Mobile-Embedded House, CNN, March 2, 2012](#)

Michael O'Hara, of the GSMA, shows CNN's Jim Boulden a home of the future, fully controlled by embedded mobile devices.

[For Consumers, 'Connected Life' Set to Intensify, MarketWatch, February 27, 2012](#)

"Embedding mobile in everything in people's lives is really the trend that we're seeing right now," said Michael O'Hara, chief marketing officer of the GSMA, the body that oversees the organization behind the Mobile World Congress, which this year has drawn more than 60,000 participants for its showcase event in Barcelona.

"There really isn't a device in your life right now that wouldn't be better if you could connect it on a wireless network," he said. "It's our feeling that consumers will eventually have six or seven devices in their life and they'll all talk to one another."

[In Barcelona, the House of the Future, Wall Street Journal Europe, February 29, 2012](#)

In the world of high-tech, the Connected House provides an unexpected touch of the old-fashioned. The star destination in the Mobile World Congress, the Connected House is an exhibition of sophisticated devices designed by the likes of Sony and Qualcomm, helping make a house more liveable — or a bit weirder at times.

The Connected House provides a showcase of how technology firms would like to be perceived: family-friendly, accessible, not requiring 100-page user manuals written by engineers.

[A Glimpse into the Remote-Controlled House of the Future, MSNBC, February 28, 2012](#)

In the not too distant future, you'll never be too far from home, as companies like AT&T rev up the ability to give consumers the means to control practically everything in the house through smartphones, tablets and anything else that's connected to the Internet.

[MWC: The Analyst's View, Mobile Marketing, March 6, 2012](#)

One of my favourite MWC things to do is to visit the Connected Home to see how close we are getting to the reality of the Connected Home. AT&T and other partners showcased some of their latest technologies in home automation, and the remote monitoring and home automation platform is almost ready for prime time. AT&T expects the Digital Life platform to be available later this year.

[MWC: Attendance Records Shattered at This Year's Event, Mobile News, March 1, 2012](#)

More than 67,000 people attend, with next year's annual trade show moving to a venue 50 per cent bigger in Barcelona. The GSMA has said more than 67,000 people attended this year's Mobile World Congress in Barcelona – a record for the annual trade show and 7,000 more than the attendance last year.



App developers learned about the latest developments at BlackBerry Developer Day

6. Sponsors and Media Partners

We would like to thank our 2012 Sponsors and Media Partners for their support.



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App Planet
Supporter



Host



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mPOWERED BRANDS MEDIA PARTNERS



RESEARCH PARTNERS



ASSOCIATION PARTNERS



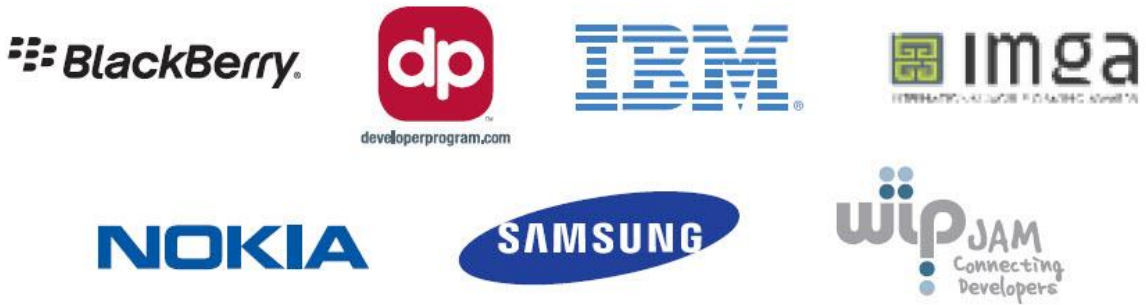
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