



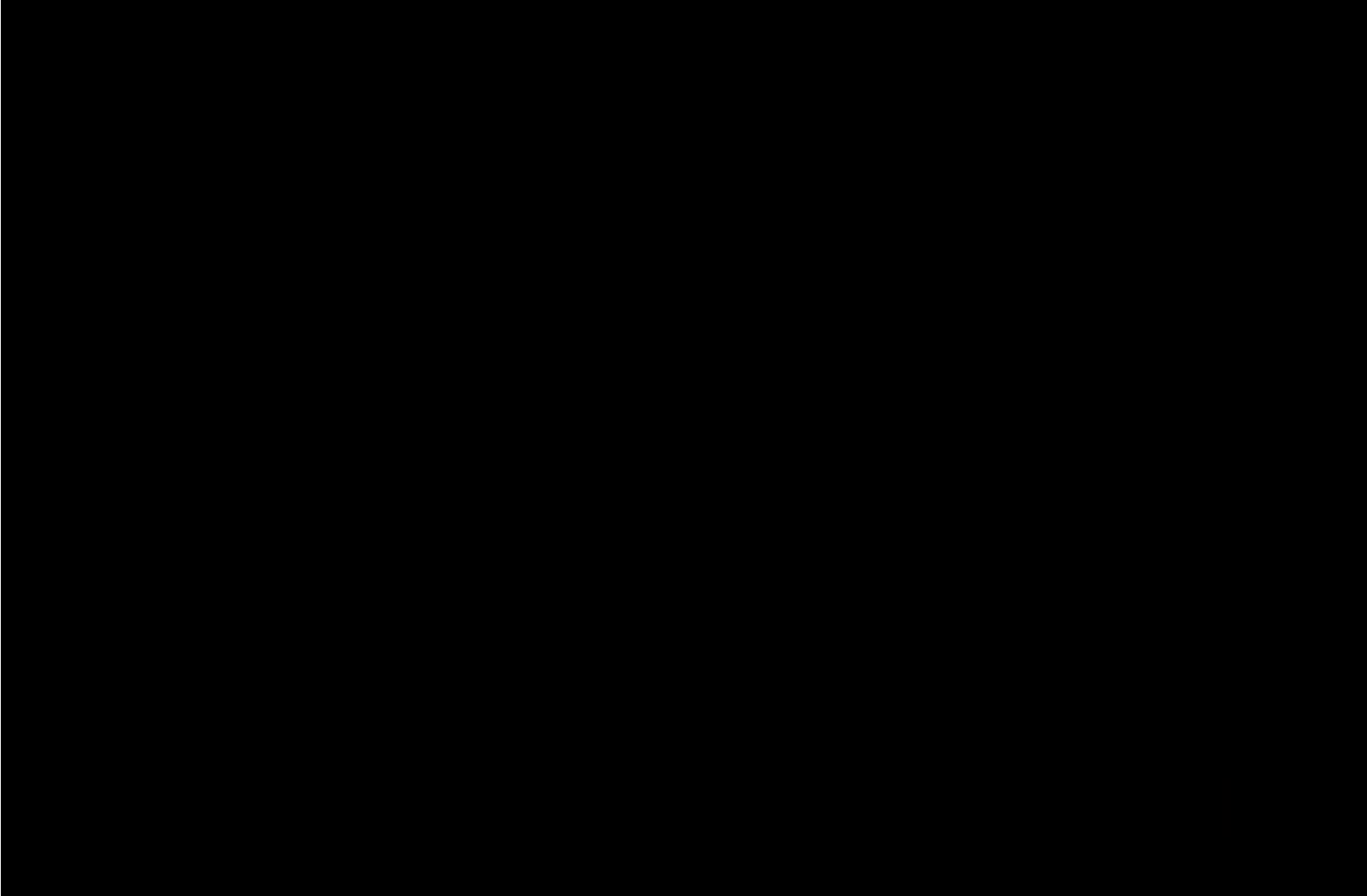
Mobile VAS in Rural Markets

Indian Merchants' Chambers

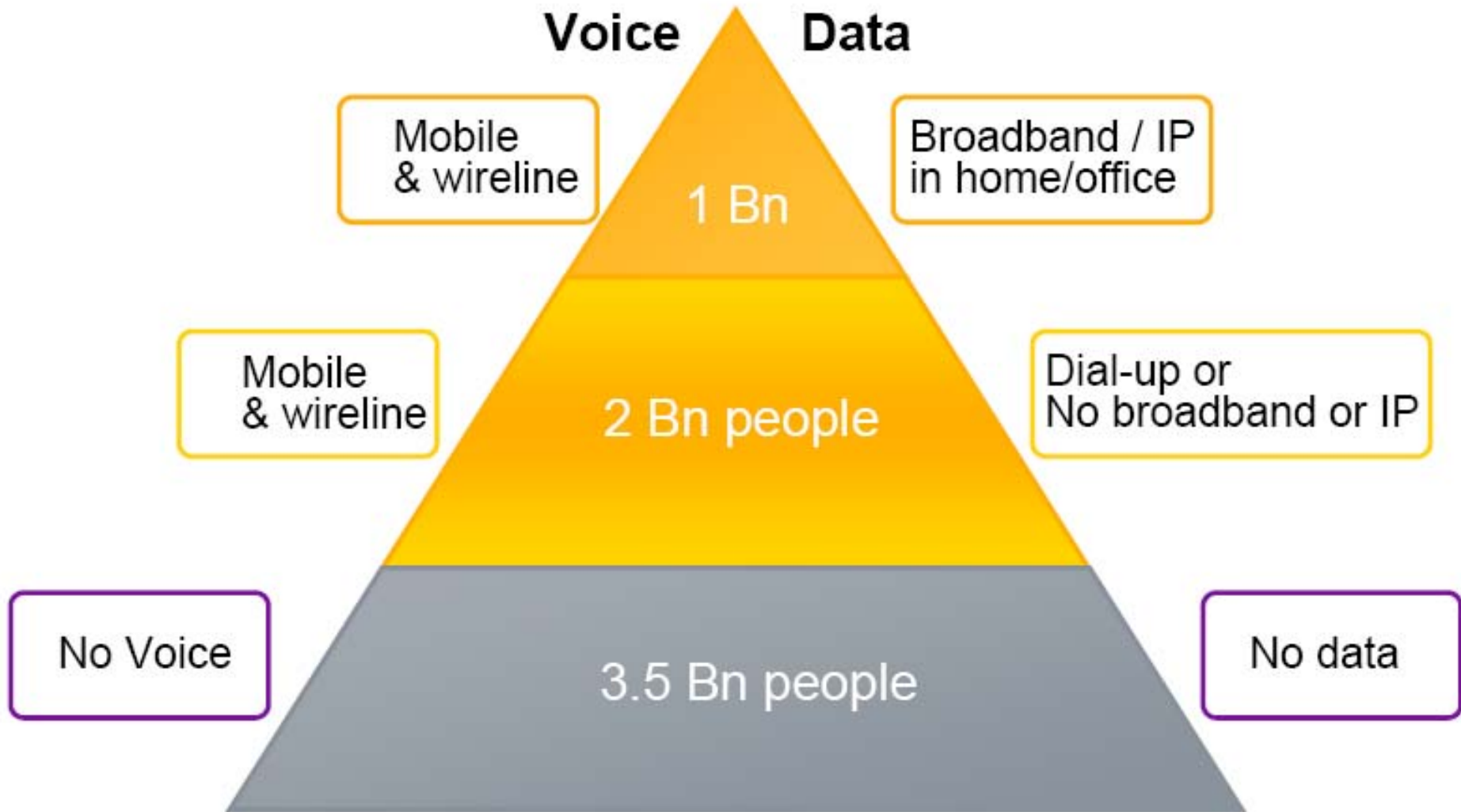
Srinivas Gopal

06 Mar 2009

The IDEA Philosophy

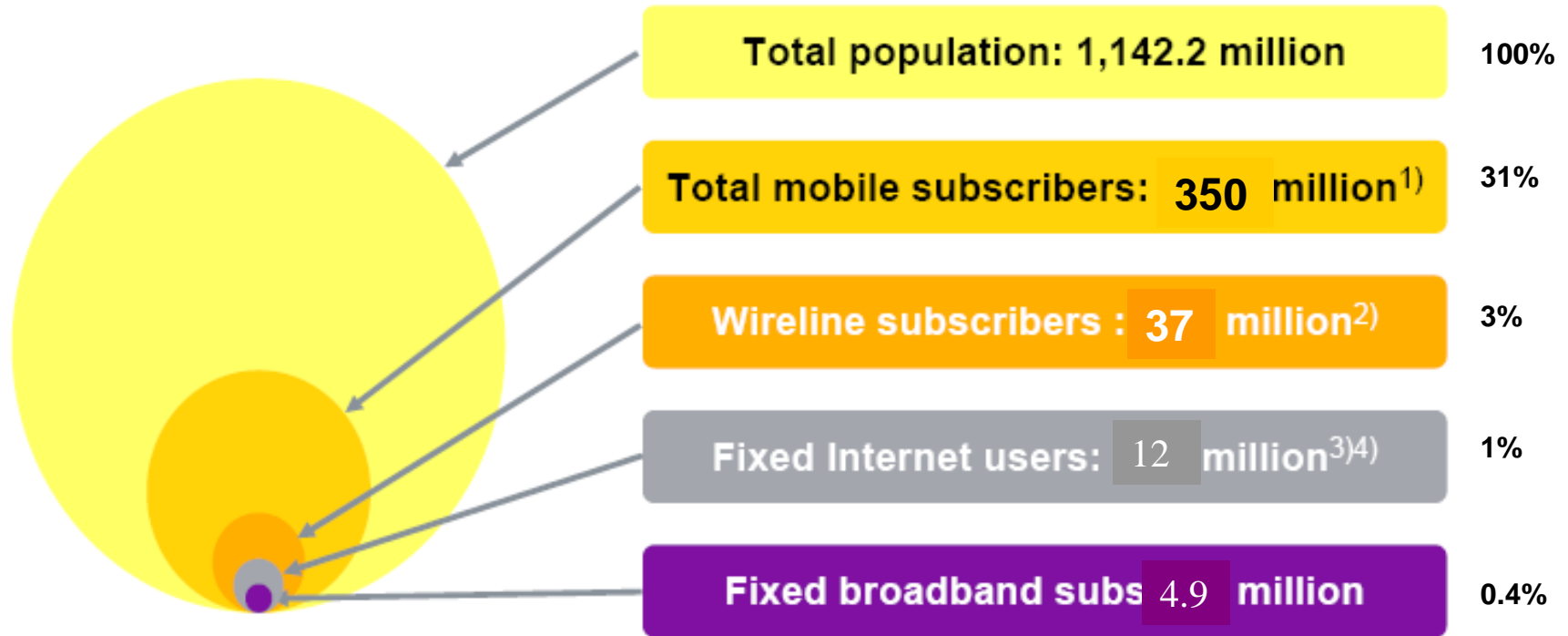


Connectivity – A Global Perspective



TRAI Annual Report, TRAI Press Release 11, 2008,

Connectivity from an India Perspective



- Low fixed broadband density due to low fixed line coverage and PC penetration levels
- Mobile broadband yet to be launched

TRAI Annual Report, TRAI Press Release 11, 2008,

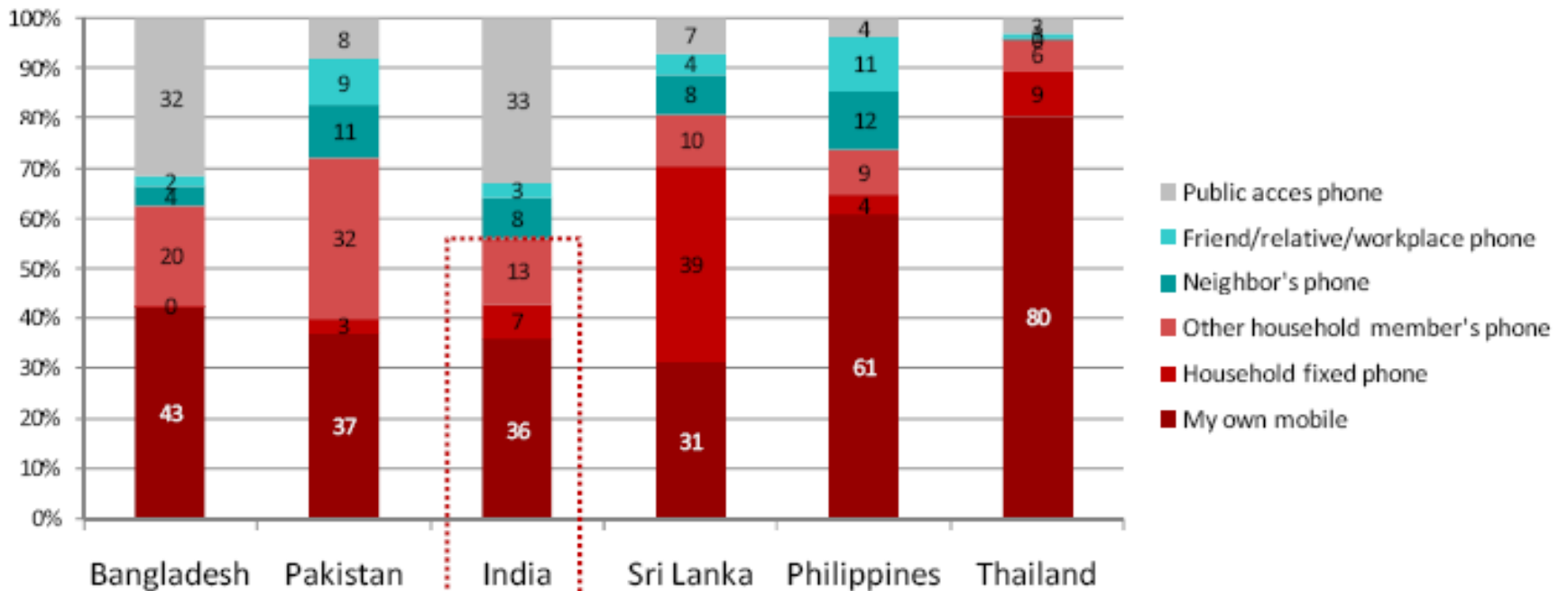
VAS in Rural Markets

TELE-USE at BOP - LIRNE Asia Bottom of Pyramid survey in 6 countries, Feb 2009

BOP Survey: Mobile is the PRIMARY Phone



Most frequently used phone (% of BOP teleusers)



Access within the household

BOP Survey: What are subscribers doing?

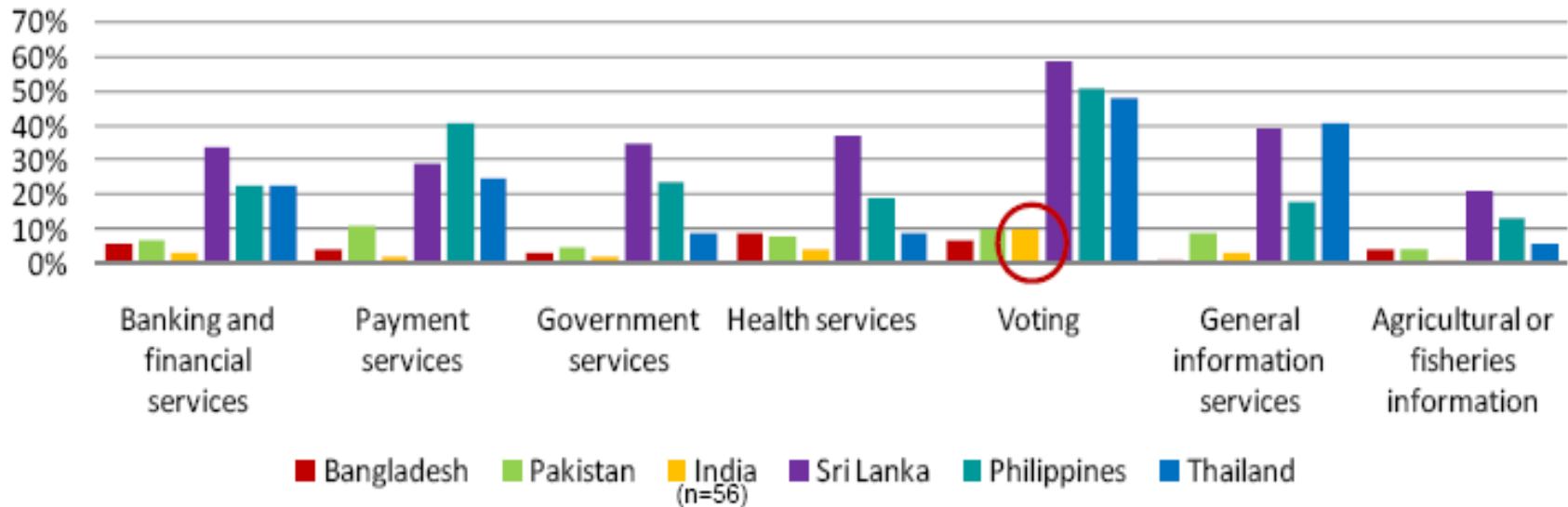


	B'desh	Pakistan	India	S' Lanka	Ph'pines	T'land
	% of BOP mobile owners					
Taking phone calls	100%	100%	99%	100%	89%	100%
Receiving phone calls	100%	100%	98%	100%	99%	100%
Sending/receiving 'missed calls'	94%	84%	84%	73%	86%	39%
Sending/receiving SMS (text messages)	32%	47%	33%	52%	100%	53%
Sending/receiving MMS (picture messages)	1%	4%	4%	6%	13%	4%
Sending/receiving emails	0%	0%	1%	0%	0%	1%
Browsing the Internet	0%	1%	1%	2%	0%	2%
Taking photos /video clips	4%	2%	1%	8%	4%	18%
To play games (individual)	13%	18%	7%	21%	14%	17%
To play games (interactive)	1%	1%	1%	1%	3%	1%
To listen to the radio	0%	7%	3%	12%	5%	22%
To listen to music (files which you have downloaded or been sent by others, not radio)	4%	5%	3%	7%	3%	22%
To share content that you have created (E.g. ringtones, wallpapers, pictures, games and video clips)	1%	2%	2%	6%	5%	3%
To send or receive or download or upload other content (E.g., ringtones, wallpapers, pictures, games and video clips)	0%	2%	3%	8%	10%	9%
As an organizer (keep appointments, reminders, alarm and clock)	1%	7%	8%	4%	9%	14%
To check my bill / credit balance	11%	40%	25%	50%	3%	39%

BOP Survey: VAS Awareness Lacking



Awareness of services at the BOP (% of BOP teleusers)



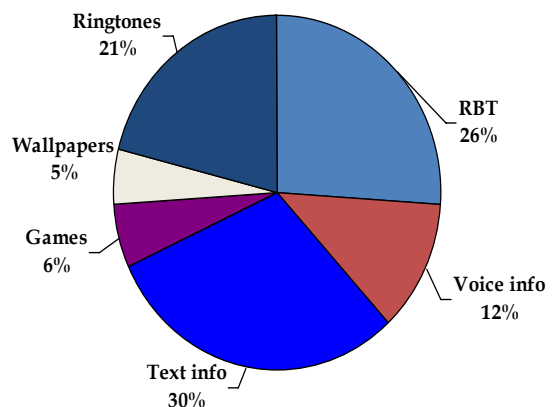
- 10% are aware of voting applications in India (competitions, real time polling, live participation in TV/radio programs, etc)



Rural VAS Offerings – IDEA Cellular

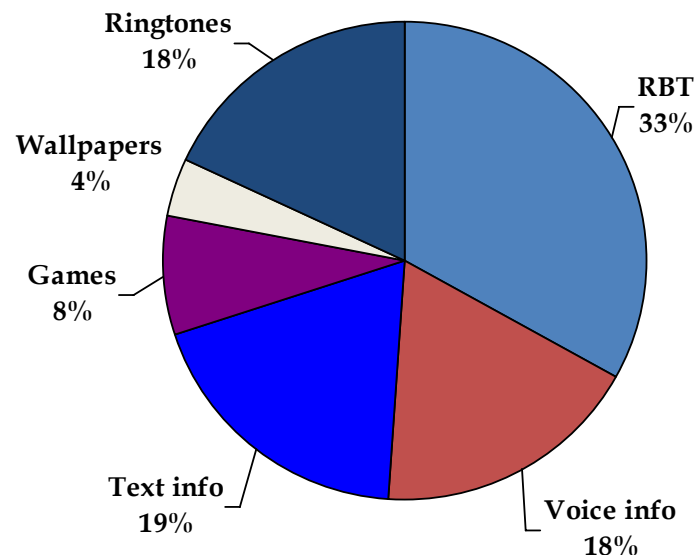


VAS market in India (without P2P)



2005

VAS Revenue: Rs 3.5bn



2010

VAS Revenue: Rs 38bn

* Industry Estimates

Focus on Rural - Productivity and Entertainment – On SMS and Voice



- **Mandi Rates**

Latest rates in mandis as listed in specific crop districts

- **Agriculture**

Tips on harvest information, rainfall, efficient use of fertilizer, manure, seed distribution etc

- **Education**

English speaking skills, competitive exams training,

- **Employment Opportunities**

Rural and Urban opportunities for job seekers

Opportunities Landscape: Mobile Bridging the Digital Divide



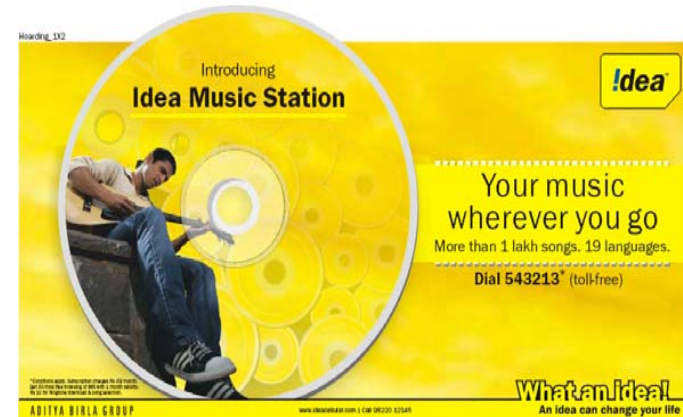
Connectivity



Internet On Mobile



Localized Content



Localization is KEY : Regional Content portals



Hindi

idea fresh

Change Language(भाषा) ↓

निगार की अदा

क्यूट गर्ल

सुभाश घई सुपरहिट्स

ख ने बना दी जोड़ी - मूवी स्पेशल

स्पाटलाइट

युवराज - मूवी स्पेशल टोन्स
सलमान और कैटरिना - टोन्स और इमेज गैलरी

रहमान हिट्स- लाजवाब टोन्स

एनीमेशन

डाउनलोड के लिए क्लिक करें @ रुपये. 10

और 22

वॉलपेपर्स

डाउनलोड के लिए क्लिक करें @ रुपये. 10

और 22

Telugu

idea fresh

Change Language(భాష) ↓

యానిమేషన్ @ Rs 10/-

వాల పేపర్ @ Rs 10/-

వైశింతులు క్లిక్ చేయండి

స్పాట్ లైట్

యువసాహూర్ - నారాయణ స్పెషల్
మరిచోటి మచుత - బోన్స్ మరియు ఇమేజిస్

అందాల త్రిపు - ఇమేజిస్ మరియు బోన్స్

యానిమేషన్

డాన్లోడ్ కై క్లిక్ చేయండి @ రూ.10

మరిచి 22

వాల పేపర్స్

డాన్లోడ్ కై క్లిక్ చేయండి @ రూ.10

మరిచి 22

Malayalam

idea fresh

Change Language(ഭാഷ) ↓

ആനിമേഷൻ @ Rs 10/-

ഇലിങ്ക് ഫ്ലിക്ക് ചെമ്മു

സ്പോട്ട് ലൈറ്റ്

സിംഗി 20

കണ്ണി 20 മുഖി സ്പെഷ്യൽ

നിലീഫ് സ്പെഷ്യൽ

മലയാളം സൂപ്പർസ്റ്റാഴ്സ് ഗാലറി

ആനിമേഷൻ

ഡൗൺലോഡിനായി ക്ലിക്ക് ചെയ്യുക @ രൂപ.10

അഡീഷൻ 22

വാൾപേപ്പർ

ഡൗൺലോഡിനായി ക്ലിക്ക് ചെയ്യുക @ രൂപ.10

അഡീഷൻ 22

Rural Commerce Services: Payments, Banking and Money Services form part of the ecosystem



Banks



Retail Merchants



C Care



Insurance



M-Wallet



Platform



Post Office



MFIs



Collection



Remittances

Platform Services

Subscriber Services

Payment Services

The 3G Era



Rich Data Services

Access high-bandwidth data applications like Locations Based Services



Compelling Experiences

Create unique entertainment experiences like Live TV



Innovation Platform

Spur innovation through a ready-to-deploy mobile developer ecosystem platform



Thank You

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Idea Cellular Ltd

srinivas.gopal@idea.adityabirla.com