



Australian Mobile Telecommunications Association

Annual Report 2013





AMTA Contacts

Membership

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MobileMuster

To contact MobileMuster phone 1300 730 070 or email mobilemuster@amta.org.au. For more information about MobileMuster go to www.mobilemuster.com.au

Mobile Carriers Forum

To contact the Mobile Carriers Forum phone (02) 6295 8191 or see the website: www.mcf.amta.org.au

AMTA Members

Carriage Service Providers

Dodo Australia, Lebara Mobile, Lycamobile, Optus, Telstra, VHA Pty Ltd

Handset Manufacturers

LG Electronics Australia, HTC (Aust & NZ), Nokia Australia, Motorola Mobility Australia, Research in Motion, Samsung Australia, Sony Ericsson, ZTE Australia

Retailers

Mobile Network

Infrastructure Suppliers

Alcatel-Lucent Australia, Ericsson Australia, Huawei Technologies, Nokia Solutions and Networks, Qualcomm International

Support Industries

Crown Castle International, Evans Planning, KPPR, Paradigm.one, RF Industries, Risk Insure, Urbis Pty Ltd

AMTA Vision

The Australian Mobile Telecommunications Association is the peak national body representing Australia's mobile telecommunications industry.

AMTA's vision is to promote an environmentally, socially and economically responsible, successful and sustainable mobile telecommunications industry in Australia.

AMTA aims to achieve its vision by:

- effective industry representation and leadership
- generating consensus on whole-of-industry issues
- improving the level of trust between the industry, related industries, key stakeholders and the wider community
- promoting an improved understanding of the mobile telecommunications industry and its contribution to the Australian community.

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Chair's Report 2013



Warwick Bray, Chair, AMTA

A key focus for the Australian Mobile Telecommunications Association (AMTA) this year has been to highlight the growing importance and influence of mobile telecommunications in Australia's digital economy and the increasingly central role of mobile services and applications in how we run our lives at home and at work.

The Association has worked closely with members to further develop its mix of economic, social and environmental programs in support of a responsible, successful and sustainable Australian mobile industry.

Mobile Nation

In an election year AMTA made a priority of highlighting the economic enabling capacity of mobile services, particularly mobile broadband.

To this end AMTA commissioned a major report earlier this year to explore current mobile industry dynamics and focus on key flow-on impacts of mobile telecommunications including the contribution to productivity, which is so vital to economic growth, as well as some important social implications.

The report, *Mobile Nation: The economic and social impact of mobile technology*, undertaken by Deloitte Access Economics, clearly concludes that:

"With the capacity to enable more productivity growth, technology developments in the mobile sector and their diffusion throughout the economy has the potential to reverse Australia's declining productivity performance."

The report's central finding is that the current wave of mobile technologies will result in a productivity benefit to the Australian economy of \$11.8 billion over the period to 2025. In the year 2011 alone this contribution to the Australian economy was estimated to be \$495 million. The annual productivity benefit is expected to grow over time, to \$1.3 billion in 2016 and to \$1.8 billion in 2025.

The Deloitte Access Economics analysis seeks to measure mobile technology's impact on the productivity performance of the national economy by measuring its contribution to labour and capital productivity through developments such as:

- business productivity through communications on the go
- use of downtime
- M2M technologies
- teleworking
- M-commerce
- productivity apps assisting organisational processes.

There can be no doubt that our customers, who are at the centre of our industry, are enjoying and demanding at unprecedented levels the full range of opportunities from the intersection of mobile technology and the internet – arguably two of the most influential technologies of our generation.

This pervasive technology is deeply embedded in all our lives. Behind the growing importance of mobile as an enabler of national productivity and efficiency, people are using mobiles for a broad range of social activities outside business, including wider connection with people of similar interests, deeper connections (keeping in touch with family and friends), entertainment (music, games, photography and videos) and management of personal affairs.



Dr Ric Simes (Deloitte Access Economics), Warwick Bray (AMTA, Chair), Minister for Broadband, Communications and the Digital Economy, Senator Stephen Conroy, Chris Althaus (AMTA, CEO), John O'Mahony (Deloitte Access Economics)

The Deloitte Access Economics report also poses a series of questions and challenges on potential social impacts of mobile telecommunications, ranging from their effect on individual identity to impacts on communities and relationships and shifts in work-life balances. As a society we need to be vigilant in recognising and facing up to any social challenges that may arise as we take advantage of the benefits mobile services and applications can provide. In this context AMTA and its members have an important contribution to make.

Growth Trends

Currently our industry serves more than 30 million subscriptions in a population of 23 million people – four subscriptions for every three people¹ – and it is estimated that 90 per cent of subscribers will be using smartphones by 2015².

Australian mobile broadband traffic is expected to grow strongly over coming years. In 2011, an average of 8.8

petabytes per month were used and this is forecast by Cisco to grow to 119.3 petabytes per month by 2016 – a 14-fold increase³.

In Australia, smartphone take-up last year soared by 104 per cent to 8.67 million and demand for mobile data is doubling every year⁴. Clearly our customers are exploiting the myriad of opportunities to use their smartphones, mobile modems and tablets.

Investment

The mobile sector's extraordinary growth highlights the need for continued investment in cell sites, the latest network technology, and radiofrequency spectrum. Such investment underpins network performance and the delivery of productivity and social benefits. The industry in Australia has invested more than \$10 billion in mobile networks, spectrum purchases and spectrum licence reissue fees over the past two years.

1 Australian Communications and Media Authority (ACMA) Media Release: "Australia's digital footprint expands", 6 December 2012

2 ACMA Communications Report 2011-12

3 Cisco, 2012. "VNI Forecast Highlights" Accessed via http://www.cisco.com/web/solutions/sp/vni_forecast_highlights/index.html

4 ACMA, *Smartphones and tablets: Take-up and use in Australia*, 1 February 2013

This substantial investment has occurred against a background of slowing industry revenues, which were flat in 2012-13. The massive growth in devices and data against a backdrop of flat industry revenue has been described by Deloitte Access Economics as customers getting “more bytes for their buck” – a comment supported by a recent Organisation for Economic Co-operation and Development report which identified Australia as having the most affordable post-paid mobile smartphone plans amongst the 12 nations surveyed⁵.

To achieve its full productivity-enabling potential the mobile telecommunications sector must have a regulatory and policy framework that promotes growth. In order to support this dynamic market, which is increasingly characterised by convergent technologies and platforms, regulatory policy must:

- not inhibit fair and open competition
- minimise the cost of compliance
- encourage deregulation
- be clearly understood and applied consistently to deliver the certainty necessary for continued investment.

Conclusion

In 2013 the mobile telecommunication sector has once again lived up to its reputation as a dynamic and vibrant industry with far-reaching influence. Unity-of-purpose under the AMTA banner will continue to play a key role in meeting the challenges and realising the promise of our exciting future.

I want to thank the members of the AMTA Board for their engagement and contribution during the year. On behalf of the Board, I also thank for their contribution those directors who left the Board in 2013, particularly Josh Delgado (Samsung), who stepped down from the Board in July, for his service as Deputy Chair.

Finally, I acknowledge the professionalism of the AMTA team and thank them on behalf of the membership for their efforts and program results.



AMTA Chair Warwick Bray (Telstra) at Mobile Nation launch, Parliament House, Canberra

⁵ The Guardian Datablog 8 July, 2013, “Australia the cheapest place to operate a mobile phone, OECD finds”. Accessed via <http://www.theguardian.com/news/datablog/2013/july/08/australia-cheapest-mobile-phone>

CEO's Report 2013



Chris Althaus, AMTA CEO.

AMTA has focused on a rich tapestry of political, policy, regulatory and market-based issues during 2013.

From the highly charged political dynamics of an election year, to the stark reality of slowing mobile revenues – 2013 was a challenging year for AMTA and many AMTA members.

However amidst all the noise mobile telecommunications continue to transform the way Australians interact and do business.

The year began with the surprise announcement of a September 14 election by then Prime Minister Julia Gillard – effectively sparking a seven-month election campaign.

While the early announcement was a surprise, AMTA had already prepared materials for the election year with a clear focus on making sure political parties recognised the significant contribution mobile telecommunications make to the Australia's economy and society.

A key theme in the pre-election positioning was economic management and the pathway to return the budget to surplus in 2013/14. In this context the prerequisites for economic growth: **population** growth, workplace **participation** and **productivity** all featured in the political and policy discourse.

Deloitte Access Economics



Mobile nation
The economic and social impacts of mobile technology

Deloitte.

As a contribution, AMTA commissioned research by Deloitte Access Economics (DAE) entitled “*Mobile Nation – The economic and social impacts of mobile technology*” which included the conclusion:

With the capacity to enable more productivity growth, technology developments in the mobile sector and their diffusion throughout the economy has the potential to reverse Australia's declining productivity performance.

The report goes on to suggest the current wave of mobile technologies will result in an estimated productivity benefit to the Australian economy of \$11.8 billion from 2012 – 2025.

In fact, mobile technology increasingly underpins Australia's digital economy in a converging market where rapid technological change and unrelenting growth in data consumption demands continuous technology and network investments despite some downward pressure on industry revenues.



AMTA CEO Chris Althaus at launch of Mobile Nation report at Parliament House, Canberra

In short, mobile technology has evolved from a simple communication tool to become fundamental to business and social interaction in Australia. Everything digital is going mobile: computers, software, the internet, cloud and social media.

Against this background, AMTA believes mobile policy must be a key element of Australia's communications policy and during the election campaign AMTA promoted the following policy principles and positions, which recognise the enabling role mobile plays in Australia's economy and highlight the essential elements of a strong mobile telecommunications policy.

Principle 1

A policy framework that recognises and promotes continued mobile industry investment in latest generation mobile technologies and infrastructure will maximise the productivity and connectivity benefits to Australian consumers, businesses, organisations and governments.

The mobile industry is committed to meeting the unrelenting growth in demand for mobile data and broadband services by investing in latest generation mobile technologies and network infrastructure across Australia.

This commitment is demonstrated by the \$10-plus billion investment industry has already made in mobile networks, spectrum purchases and spectrum licence reissue fees over the past two years as well as carriers' current plans for the roll-out of next-generation mobile data and broadband services.

It is important to understand this increasing level of investment in the context of mobile infrastructure costs (including spectrum licences, network deployment and latest generation technologies), while mobile industry revenues are under downward pressure for the first time ever.

Continued mobile industry investment is essential for mobile carriers to be able to meet exponentially increasing consumer demand for mobile services, including mobile broadband.

Government policy settings must encourage and promote continued mobile industry investment to ensure consumer demands can be met across Australia with the flow-on productivity and connectivity benefits identified in the Mobile Nation report.

Principle 2

Regulation must be minimised and red tape reduced to ensure the productivity and connectivity benefits of mobile broadband are realised.

A sound communications policy platform must comprehensively address the risks of unnecessary regulation and the burden to industry of excessive red tape.

In order to maintain the highly competitive nature of the mobile industry, regulation needs to be minimised to provide the flexibility necessary for industry to adapt to the rapid pace of technological change and the continual evolution of business models in mobile markets.

The regulatory framework needs to be clearly understood and applied consistently so that industry has the requisite confidence and certainty to pursue ongoing investments. In addition, industry's compliance costs must be minimised to encourage continued innovation and investment.

Where regulation is necessary, AMTA supports the existing co-regulatory model based on industry codes of practice which remains a flexible approach to regulation in such a rapidly changing sector.

AMTA endorses the OECD regulatory governance principles (listed below) and supports a recommitment to these principles by the Australian Government in the context of ongoing efforts to reduce the burden placed on industry by excessive red tape.

OECD regulatory governance principles

1. *Adopt at the political level broad programs of regulatory reform that establish clear objectives and frameworks for implementation.*
2. *Assess impacts and review regulations systematically to ensure that they meet their intended objectives efficiently and effectively in a changing and complex economic and social environment.*
3. *Ensure that regulations, regulatory institutions charged with implementation, and regulatory processes are transparent and non-discriminatory.*
4. *Review and strengthen where necessary the scope, effectiveness and enforcement of competition policy.*
5. *Design economic regulations in all sectors to stimulate competition and efficiency, and eliminate them except where clear evidence demonstrates that they are the best way to serve broad public interests.*
6. *Eliminate unnecessary regulatory barriers to trade and investment through continued liberalisation and enhance the consideration and better integration of market openness throughout the regulatory process, thus strengthening economic efficiency and competitiveness.*
7. *Identify important linkages with other policy objectives and development policies to achieve those objectives in ways that support reform.*

Principle 3

It is essential that the Australian Government develops a clearly defined spectrum policy that includes long-term arrangements to meet future spectrum requirements for mobile data and broadband services.

Radio-frequency spectrum is a scarce resource and the future of mobile telecommunications and the associated productivity and connectivity benefits for Australia's economy may not be fully realised without a comprehensive spectrum policy framework that provides a sound foundation for future government policy decisions about spectrum for mobile telecommunication services.

Deloitte Access Economics' recent Mobile Nation report found:

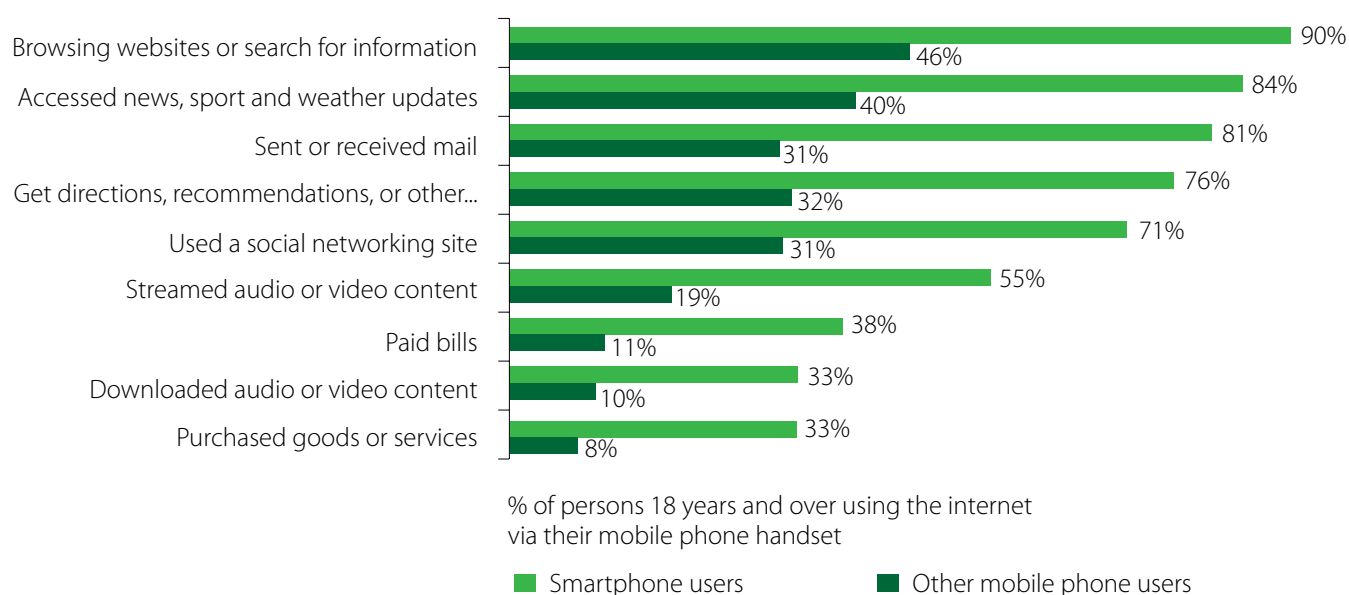
"Increased constraints on mobile network infrastructure will reduce the capacity of the industry to meet the growing demand for mobile broadband from customers. To maximise the benefits of mobility in the digital economy, spectrum policy settings must be reviewed and allow for the staged expansion of spectrum resources to mobile broadband."

The ACMA is already moving to further investigate the spectrum demand for wireless access services. AMTA recognises the ACMA has completed a broad body of research and analysis with strong industry engagement on



AMTA Chair Warwick Bray, CEO Chris Althaus and the Minister for Communications, Malcolm Turnbull

Figure 2: Activities undertaken online via mobile phones by handset set



specific spectrum management and planning approaches to support mobile broadband. However, AMTA believes there is more to be done to develop a holistic spectrum policy that includes long-term arrangements to meet spectrum requirements for mobile telecommunications.

AMTA also strongly believes it is critically important that industry has a reasonable level of awareness and certainty about the Australian Government's approach to current and future spectrum allocations and that an overarching spectrum policy recognises and reflects market demand pressures.

Demand for Mobile Services

Surging demand for mobile broadband and mobile data services continued unabated in 2013. The rapid adoption of smartphones and tablets has underpinned this demand with over half Australian mobile users now using a smartphone and smartphone penetration of more than 90 per cent expected by late 2015.

The driver of much of the network traffic continues to be video with apps, email, social networking and messaging / telephony also in the mix.

With mobile broadband traffic expected to increase from around 105 Petabytes in 2011 to around 1,430 Petabytes in 2016 much of industry's focus is on the infrastructure needed

to meet this demand. The three primary elements in this context are:

- Use of latest-generation technologies
- Deployment of mobile network infrastructure
- Access to radio-frequency spectrum

The industry is investing heavily in all three elements via the rapid roll-out of 4G LTE technologies and networks, significant augmentation of existing networks and a focus on effective use of existing and new spectrum resources.

Spectrum

This year featured the long-awaited Digital Dividend auction, which brought 700 MHz and 2.5GHz spectrum to market with all but 30MHz of 700MHz sold and scheduled to be available by 1 Jan 2015.

Post-auction, AMTA welcomed the Government's early initiative to direct the ACMA to define the process to market the remaining 30MHz of 700MHz spectrum.

AMTA continues to note the essential need for long-term spectrum planning to focus on the challenges confronting the mobile industry, given the projected network traffic growth scenarios arising from latest-generation mobile services, particularly mobile broadband and M2M.

To this end, AMTA has welcomed the ACMA's initiative in 2013 to commission new studies focusing on the contribution of mobile telecommunications to the economy and relating this to the future spectrum demand/supply situation.

The challenge of getting the balance right between commercial and non-commercial spectrum uses has never been more compelling. All spectrum uses and users will be subject to increasing scrutiny against the ACMA's spectrum management principles:

1. Allocate spectrum to the highest value use or uses
2. Enable and encourage spectrum to move to its highest value use or uses
3. Use the least cost and least restrictive approach to achieving policy objectives
4. To the extent possible, promote both certainty and flexibility
5. Balance the cost of interference and the benefits of greater spectrum utilisation
6. The key theme of the Principles is that maximising the overall public benefit from use of the radiofrequency spectrum requires balanced application of both regulatory and market mechanisms.

Conclusion

As widely acknowledged, the mobile sector continues to expand its contribution and influence. In representing the industry, AMTA continues to enjoy close and productive relationships with members and key stakeholder organisations. My thanks for your engagement with AMTA in 2013. In particular I note the very constructive engagement with the Department of Communications (formally DBCDE), the ACMA and industry colleagues at Communications Alliance.

In closing, I want to thank the Chair and Board and all AMTA committee members for their engagement, advice and commitment of time to AMTA in 2013. On behalf of the AMTA team, we look forward to continuing the journey with you in 2014. Finally, I acknowledge and thank the AMTA staff for their hard work and professionalism in achieving another year of strong program outcomes.



Minister for Broadband, Communications and the Digital Economy, Senator Stephen Conroy, addresses Mobile Nation launch, Parliament House, Canberra



AMTA CEO Chris Althaus and Paul Fletcher MP at Mobile Nation launch



AMTA CEO Chris Althaus participated in the Ministerial Program at this year's GSMA Mobile World Congress in Barcelona

AMTA Policy Program

Productivity gains from mobile devices

AMTA's Policy and Strategy Steering Committee (PSSC) works to identify policy issues affecting the mobile telecommunications industry and develop strategies to enable the industry to effectively respond to those issues.

The PSSC focuses on the following broad areas:

■ Economics and Infrastructure

- ▶ Productivity benefits of mobile technology
- ▶ Convergence, mobile services and devices
- ▶ Mobile network infrastructure, including radiofrequency spectrum

■ Social Responsibility

- ▶ Community engagement, consumer education and awareness
- ▶ Privacy and mobile device security
- ▶ Law enforcement, national security and emergency services

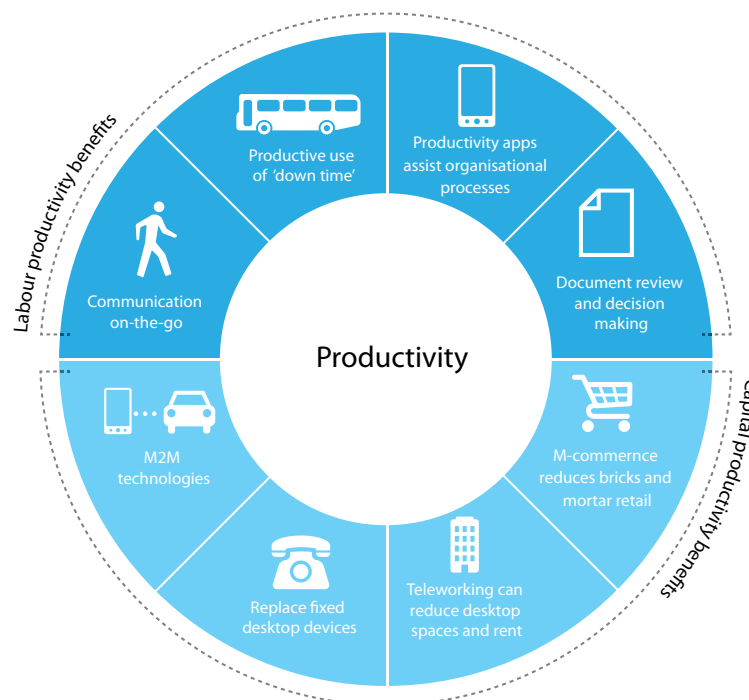
The PSSC strives for leadership in promoting policy settings that:

1. Promote public trust and confidence in mobile services, devices and technology
2. Build consumer awareness and deliver robust consumer safeguards
3. Encourage ongoing innovation and continued investment in infrastructure
4. Result in a regulatory and legislative framework that is reasonable, flexible and proportionate.

Economics and Infrastructure

Mobile technology increasingly underpins Australia's digital economy in a converging market, where rapid technological change and unrelenting growth in data consumption demands continuous technology and network investments despite downward pressure on industry revenues.

The mobile industry plays an enabling role in Australia's economy and contributes to rising productivity.



Mobile devices can increase productivity by increasing the effectiveness of employees and managers (labour productivity) or increasing the effectiveness or reducing the need for computers, vehicles and office space (capital productivity)

Source: Deloitte Access Economics.

The Mobile Nation report found that the current wave of mobile technologies will result in an estimated productivity **benefit to the Australian economy of \$11.8 billion from 2012 – 2025**. In 2011, this contribution to the Australian economy was estimated to be \$495 million with annual benefits expected to grow to \$1.3 billion by 2016.

AMTA believes that the mobile industry's investment-driven approach will promote an innovative and efficient converged telecommunications market in Australia.

In 2013, AMTA has actively engaged with Government and regulators to ensure that the enabling role of the mobile industry is recognised and to drive an agenda of policy reform that will review legacy mobile telecommunications legislation with a view to lifting regulatory burdens on industry, cutting red tape and ensuring the productivity benefits of mobile are realised.

Using your mobile phone responsibly and with respect for others.

Responsible

Radiofrequency Spectrum

The PSSC has continued to run an active spectrum policy program throughout 2013 and AMTA attended the ACMA's Radcomms Conference in September.

AMTA sees the following issues as priorities for spectrum policy under a newly-elected Government:

- Review and reform of the Radiocommunications Act with a view to lifting regulatory burdens, reducing complexity around spectrum licence renewal processes and planning for the transition to a platform-neutral approach
- ACMA processes for defining the future demand for spectrum for mobile broadband
- Allocation and planning for new spectrum bands for future mobile broadband use.

Social Responsibility

Community Engagement, consumer education and awareness

AMTA has maintained regular formal engagement with the Australian Communications Consumer Action Network (ACCAN) as well as other industry organisations in 2013. AMTA continues to participate in the Government's Consultative Working Group (CWG) on Cyber-Safety and the ACMA's Consumer Consultative Forum (CCF). AMTA believes that such regular engagement, collaboration and co-operation between industry, government, regulators and consumers can provide the foundation for a socially and economically responsible mobile telecommunications industry in Australia.

AMTA's new MobileTips website was launched at the end of 2012.



The MobileTips website contains consumer-friendly tips on topics such as: how to avoid bill shock; international mobile roaming; mobile coverage; cyber-safety and cyber-security; how to handle cyber-bullying (for parents and children); health and safety concerns; driving and pedestrian safety tips; links to other AMTA programs such as MobileMuster and the Lost and Stolen. MobileTips also provides information for people with accessibility requirements and links to the Global Accessibility Reporting Initiative's (GARI) newly-launched website that allows consumers to easily search for a mobile phone, tablet or app that meets their accessibility needs. Consumers can now also follow MobileTips on Twitter @AustMobileTips.

Mobile Apps

The PSSC is aware of concerns raised by consumers regarding the way some apps are supplied and marketed, particularly apps that allow in-app purchasing that are marketed primarily to children. It acknowledges that there is a gap in consumer awareness that needs to be assessed with targeted mechanisms developed by relevant sectors of the app industry.

Practical tips to
help you manage
your mobile phone
spending.

Affordable

AMTA made a submission to the Commonwealth Consumer Affairs Advisory Council's (CCAAC) Inquiry into 'App purchases by Australian consumers on mobile and handheld devices' at the beginning of 2013. AMTA is committed to improving industry efforts to raise consumer awareness of the available controls, restrictions and protections that are available on various platforms and mobile devices. The MobileTips website now includes tips for parents and carers on how to prevent bill shock associated with children's in-app purchasing.

The CCAAC's report was released later in July and more recently the Australian Competition and Consumer Commission (ACCC) announced that it was participating in an international effort to identify smartphone and tablet apps that may mislead consumers, particularly children, into making in-app purchases. The ACCC is also engaging with platform operators, such as Apple and Google, to improve the information provided to consumers about apps. The PSSC continues to monitor consumer concerns as well as efforts by app store providers to improve consumer awareness levels and implement adequate consumer safeguards.



Senator Bridget McKenzie (Nationals, Victoria) with AMTA Director, Sean O'Halloran (Alcatel-Lucent)

International Mobile Roaming Industry Standard

The *Telecommunications (International Mobile Roaming) Industry Standard 2013* was made on 27 June 2013. The Standard contains five broad requirements on mobile carriers:

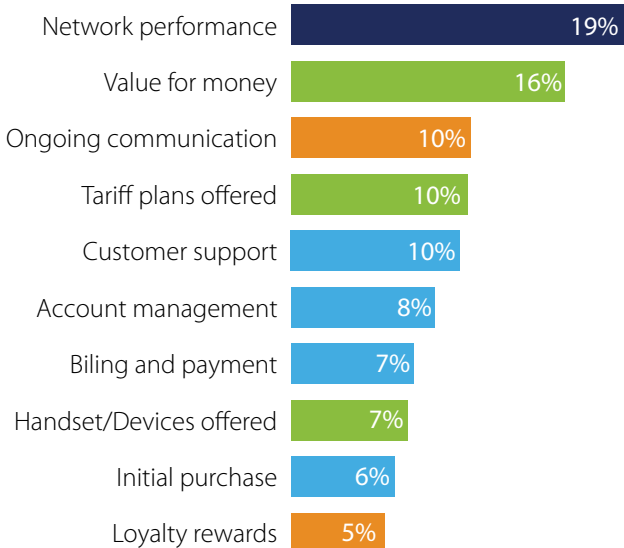
1. An SMS warning notification must be sent to all consumers upon arrival in an overseas country, warning them that "significantly higher charges" may apply for using international roaming
2. An SMS notification must be sent to consumers outlining maximum pricing information for using a range of international roaming services
3. Customers must be able to decline international roaming services, at a low cost, at any time from an overseas destination.
4. Mobile Network Operators must provide information to resellers when their customers use international roaming services.
5. Spend management tools must be made available to international roaming customers. This includes notifications at \$100 increments for data usage and notifications at 50%, 85% and 100% for included value where a customer has purchased an included value travel package from their mobile service provider.

During the development of the Standard, AMTA worked with Communications Alliance and industry members to provide feedback to the ACMA team responsible for drafting the standard. While the ACMA's Standard imposes a regulatory solution, AMTA notes that industry also moved to improve levels of consumer awareness around international mobile roaming arrangements, most notably pricing. For example, while the Standard's obligations took effect from 27 September, some carriers already had consumer alerts for



Lisa Brown (AMTA), Ray McKenzie (MCF), Kursten Leins (Ericsson), Glenn Brown (AMTA), Spyro Kolofotias (MobileMuster)

Drivers of Operator Loyalty



(Ericsson ConsumerLabs, *Keeping Smartphone Users Loyal*, 2013)

roaming customers in place for some time. With all Australian mobile carriers recently announcing new international mobile roaming offerings and plans, it is clear that the market is responding to consumer demand for simpler and more affordable roaming.

Mobile Network Performance

Ericsson's ConsumerLab recently reported that mobile network performance is the principal driver for consumer loyalty to mobile operators, ahead of value for money and customer service.

In April, the ACMA announced that it would hold a forum or 'Citizens Conversation' into mobile network performance. The Citizens Conversation was scheduled for November and the ACMA planned to release a discussion paper to coincide with it. As part of the process of preparing for the Citizens Conversation, AMTA was an active participant in industry roundtable discussions facilitated by the ACMA and provided industry feedback in relation to the planned discussion paper. AMTA also engaged with the Telecommunications Industry Ombudsman (TIO) to better understand how consumers perceived mobile network performance and coverage issues.

Privacy and Mobile Device Security

Privacy and device security issues are growing concerns for consumers and a focus point for industry. In 2013, the PSSC approved an expansion of AMTA's Lost and Stolen IMEI blocking program. The expanded program will allow carriers to block devices to prevent or manage fraud and to stop rogue devices causing network interference. It will also provide for blocking devices at the authorised request of law enforcement and security agencies. It will also allow blocking for mobile data services depending on carrier capabilities. PSSC sub-committee members are reviewing and revising the business rules underlying the program to support these changes.

Law Enforcement and Emergency Services

AMTA is committed to strengthening and facilitating the well-founded partnership that exists between law enforcement and national security agencies, emergency service organisations and the mobile industry. AMTA participates in the ACMA's Communications Security and Enforcement Roundtable (CSER) forum. And in 2013, PSSC sub-committee members have engaged with the Attorney-General's Department regarding how industry and Government can inform mobile users about contacting services such as Triple Zero, the Police Assistance Line and State Emergency Services.

AMTA has also continued its participation in industry and public safety agency roundtable discussions regarding overflow arrangements for the proposed public safety mobile broadband capability.



James Shaw (Telstra) and Matthew Lobb (Vodafone)

Prepaid Mobile Services

PSSC sub-committee members have closely engaged with the ACMA in 2013 regarding the drafting of the proposed *Telecommunications (Service Provider – Identity Checks for Prepaid Mobile Carriage Services) Determination 2013* (the new Determination). The new Determination will replace the one made in 2000.

Under the new Determination, mobile service providers will have more compliance options for prepaid identity checks, including access to the Government's online Document Verification Service (DVS). This will enable an online system of customer identity verification for prepaid mobile services that relies on Government issued identification documents such as Australian passports, visas, citizenship certificates and Medicare cards, as well as State and Territory issued drivers' licences.

With the new Determination expected to be made in late 2013, it is expected that implementation issues will be the focus for the sub-committee in 2014.

Mobile Carriers Forum

The Mobile Carriers Forum is a division of AMTA that deals with the social, environmental and regulatory issues related to mobile telecommunications networks deployment and operation in Australia.

The MCF members are Telstra, Optus, and Vodafone Hutchison Australia - the three carriers deploying mobile networks in Australia. The MCF strives to create the best regulatory environment for planning, building and operating mobile telecommunications networks.

The exponential growth in the uptake of advanced mobile telecommunications services such as mobile broadband, with users accessing the internet via mobile broadband-enabled laptops and smartphones, places enormous additional demand on mobile network infrastructure.

As mobile networks evolve, and numbers of mobile devices in use increase, the industry needs to continually plan for growth, particularly in major metropolitan and CBD areas. To meet the on-going demand, the carriers are rolling out new and upgraded 3G and 4G services faster than ever before. This heightened activity emphasises the need for comprehensive and transparent consultation with affected communities.

The MCF aims to foster positive working relationships with governments and regulators at all levels, along with other key community and industry stakeholders. Throughout 2013, the MCF has continued to engage with governments at state and local levels to address issues in the community.

Working with Government

The industry continues to work with governments at all levels in an effort to provide regulatory consistency and certainty in the planning process in line with the MCF's objectives.

In 2013, the MCF provided submissions to government departments in Queensland, New South Wales, Tasmania, Victoria and Western Australia. In particular, the MCF is anxious to have state-based planning telecommunications infrastructure codes included in state planning policies to mitigate the potential for local government schemes to develop disparate, inefficient procedures that could potentially frustrate mobile network deployments in those regions.

In Queensland, the MCF made a submission on the draft Queensland Planning Policy, currently undergoing review. A key concern for the MCF was that the policy was silent on mobile



Mobile Carriers Forum

Networking the Nation

The MCF co-ordinates mobile industry network deployment and operations across Australia



www.mcf.amta.org.au



telecommunications infrastructure, so in its submission the MCF called on the policy to acknowledge mobile telecommunications infrastructure as an essential utility for the social and economic productivity of the state, and which should be accorded this significance in the state Planning Policy by the inclusion of a telecommunications code.

In Tasmania, the MCF has written to the local government authorities, the Planning Commission and the Tasmanian Minister for Planning to alert all levels of government in that state to the current lack of a telecommunications code within the State Planning Policy, similar to the situation in Queensland. Recent work by the MCF with the Launceston City Council on their draft planning scheme, one of the first to be implemented under a state wide process to renew all local planning schemes in Tasmania, managed to avoid an outcome which proposed difficult, and often unworkable, planning provisions for mobile network infrastructure. However, it is far more efficient for this situation to be avoided altogether by having the Tasmanian Planning Commission adopt a state-based code, which sets appropriate criteria and is inserted into all local planning schemes.

The MCF is also continuing to develop further submissions to the Victorian Minister for Planning regarding the status of "A Code of Practice for Telecommunications Facilities in Victoria" which is a part of all Council Planning Schemes in Victoria. While this is an improvement on the situation in some other states, the Code has remained unchanged since its introduction in 1999 and does not adequately govern modern communications infrastructure required to be deployed by the carriers to meet future demand. The MCF seeks to address this by updating the code for changes in technology and deployment practices.

In Western Australia, the MCF recently met with directors from the WA Planning Commission to again address the status of a telecommunications code in that state. While State Planning Policy (SPP 5.2) provisions do address mobile network infrastructure, these provisions are not required to be observed in local planning schemes. The WA Planning Commission has invited the MCF to participate in a wide ranging planning review now underway and submit its proposed changes to the provisions. It has outlined for attention the situation of dealing with precedence for SPP 5.2 over local schemes and expanding the range of infrastructure that is exempt from permit under the provisions.

Financial Year Summary 2002/03 – 2012/13*			
Year	No. of complaints	Related No. of sites	No. of Consultations#
02 – 03	137	31	Not known
03 – 04	48	28	1300
04 – 05	42	25	1100
05 – 06	27	20	3639
06 – 07	31	21	1292
07 – 08	6	5	2587
08 – 09	8	6	1159
09 – 10	11	8	1580
10 – 11	7	5	4432
11 – 12	6	Not known	3580
12 – 13	3	3	4109

(Source: ACMA Annual Reports 02/03 – 11/12).

* These preliminary figures are expected to be released by the ACMA soon.

Code consultation processes

In New South Wales, the MCF participated in the Independent Pricing and Regulatory Tribunal (IPART) review of rentals charged for communication towers sited on Crown land. The schedule proposed by IPART and contested by the MCF provides for a discriminatory rental regime whereby carriers and other commercial operators are required to pay annual rentals that often exceed the entire value of the occupied land. The final report from IPART has not yet been approved by the Premier.

In all its proposals, the MCF points out the economic and social productivity benefits of modern mobile telecommunications identified in the Deloitte Access Economics report "Mobile Nation", commissioned by AMTA. This report shows that the benefits flowing to the community from access to advanced mobile telecommunications services make the proposed changes to the codes and planning provisions well worthwhile for state government and their constituents.



New site information tab for the RFNSA site has been developed to provide occupational health information for non-carrier staff who require access to radio communications sites. On the left is the desktop PC version of the new webpage and on the right is the mobile device version.

Improved engagement with the community

The MCF continues to support the industry's efforts to execute best practice community consultation at new and upgraded network facilities.

Consultation is determined by local government regulations or in the case of low- impact facilities, by the obligations outlined in the Communications Alliance (CA) Industry Code for Mobile Phone Base Station Deployment.

The Code has been a significant tool to assist the industry engage with the communities in areas where network facilities are deployed. Over the past decade, the Code has been very successful in dealing with community concerns about base station deployment. Official ACMA figures show there has been a fall in complaints received by the ACMA from 137 in 2002 when the Code was first utilised to only three complaints in 2012/13. This fall is against the

background of the number of sites deployed subject to the Code's requirements more than tripling between 2003-04 and 2012-13.

Enhancing worker safety at network radio sites

The MCF hosts the key radiofrequency (RF) safety compliance management tool, the RF National Site Archive (RFNSA). It not only provides a database of site safety information which can be shared amongst the mobile operators in ensuring they meet their health and safety regulatory commitments, but is also a key information interface with the public and a tool for managing the many site specific safety processes that are required to ensure the safety of workers around mobile network infrastructure.

In a key development of the RFNSA, a new site safety information tab has been developed in addition to the general information provided to the public for community consultation purposes. The new tab “EME Safe Work Procedures” provides basic occupational health and safety information to non-carrier staff or other members of the public required to access or work at locations nearby radio communication sites (such as building maintenance staff). This helps ensure that even those with no knowledge of radio systems or associated safety practices receive some basic safety instructions and awareness of potential hazards on site, in much the same way as ‘dial before you dig’ helps to ensure safe practice around other utilities.

The new feature has also been developed for use on mobile devices such as tablets and smartphones. Soon to be launched on its own web site (“mobile site safety”) the mobile app version will allow anyone accessing locations near mobile network infrastructure to determine what infrastructure might affect their activity, what to do and who to contact, all from the mobile device in their pocket.

Working with Councils

An important part of the MCF stakeholder engagement program is ongoing proactive liaison with local government.

This year, the MCF met with over 1000 local council officials from all over Australia at the National General Assembly (NGA) of the Australian Local Government Association (ALGA) in Canberra.

At the NGA, the MCF was showcasing the RF National Site Archive (RFNSA) and the associated public consultation web-page which helps industry demonstrate that all relevant stakeholders, including local councils, are informed and consulted about mobile network infrastructure being deployed in the community. The MCF also launched its new information brochure, which describes all the programs the MCF undertakes to co-ordinate and enhance communications between industry stakeholders, especially local government and their communities.

However, illustrating a key change in the balance of community concerns, the issue of the availability of network coverage and capacity dominated the questions put before the MCF as local governments are becoming increasingly aware of the vital nature of mobile network infrastructure in providing advanced mobile telecommunications services, and the importance of these services in bringing social and economic productivity benefits to their communities.

Mayors and councillors, particularly those from rural and remote areas, expressed with passion and enthusiasm the need for upgraded and additional infrastructure to deliver mobile telecommunications services, which enable businesses, governments and communities to participate in the modern digital economy.

The MCF was pleased to receive so much feedback from local governments on the mobile network issues in their area. The feedback will help inform MCF’s continuing focus during a period of intense network infrastructure activity as our members strive to meet the ever growing demand from their customers for advance mobile telecommunications services.



Ray McKenzie and Renae White from the MCF hosted an information booth at the Australian Local Government Association’s National General Assembly in Canberra.

MobileMuster

MobileMuster is the official product stewardship program of the mobile phone industry. It is a not-for-profit program. Our promise is to keep old mobiles and accessories out of landfill and recycle them in a safe, secure and ethical way. All we ask consumers is to recycle their old mobiles and accessories with us.

MobileMuster is managed by the Australian Mobile Telecommunications Association (AMTA) on behalf of its members – Nokia, Samsung, Motorola, LG Electronics (left program 30 June 2013) HTC, Huawei, ZTE, Telstra, Optus, Vodafone, Virgin Mobile and Force Technology. Members voluntarily fund the program.

MobileMuster aims to continually improve the **visibility**, **accessibility**, **transparency** and **sustainability** of the service by:

- keeping old mobiles out of landfill
- increasing awareness of recycling
- optimising resource recovery
- providing a free recycling service to consumers, retailers and workplaces.

Key Achievements

Since 2006 MobileMuster has:

- increased awareness from 46% to over 83%
- grown the collection rate of available mobiles from 18% to 53%
- decreased the disposal to landfill from 9% to 3%
- grown its public collection network to over 4000 drop-off sites across Australia
- put in place a freepost service using either recycling satchels or postage paid mailing labels.

Since starting, MobileMuster has collected 1,014 tonnes of mobile phones components, including 7.791 million handsets and batteries (as at 30 June 2013).



MobileMuster collection boxes are provided free of charge to organisations hosting collection points across Australia, including local councils, businesses, schools and other retailers.

State of Mobile Phone Recycling and use in Australia

While community awareness of mobile phone recycling has remained steady at 83%, people's desire to keep their old mobile phones, instead of recycling them, only dropped slightly from 40% to 37% of people that have two or more unused mobiles at home. As a result the estimated number of handsets in storage at home or work has grown from 22 million to 23 million. On the upside, the percentage of people throwing their mobiles away remained low at 3%.

In the last financial year (2012-13), MobileMuster collected 87 tonnes¹ of mobile phone components, which was down slightly on the previous year's 97 tonnes. This included more than 990,000 handsets and batteries as well as over 38,400kg of accessories.

¹ Since AMTA changed recyclers in June 2011 greater detail on the types of accessories received is now being provided. Specifically, separating display handsets from mobile phone accessories. As display handsets are not a mobile phone component and represent a material volume it was considered appropriate to include them in collection weights and rates for 2012/13 figures. The 2011/12 figures have also been adjusted. Prior to 2011/12 display handsets were reported as accessories. No adjustments have been made to figures prior to 2011/12.

This represents a collection rate of 53.1% of mobile phones that are available for recycling or just over 9% of net handset imports to Australia.

Although MobileMuster is the industry's official recycling program in Australia, there are a number of for profit reuse/

second-hand trading companies operating in Australia. MobileMuster provides a free recycling service to some of these traders when they receive mobile phone components they cannot sell. About 13.5% or 5.4 tonnes of MobileMuster's annual collections came from these programs, which was up from 2.1 tonnes in the previous year.

Figure 1: Total annual collections by weight (kg) – all mobile phone components (plus shipments, imports and export numbers)

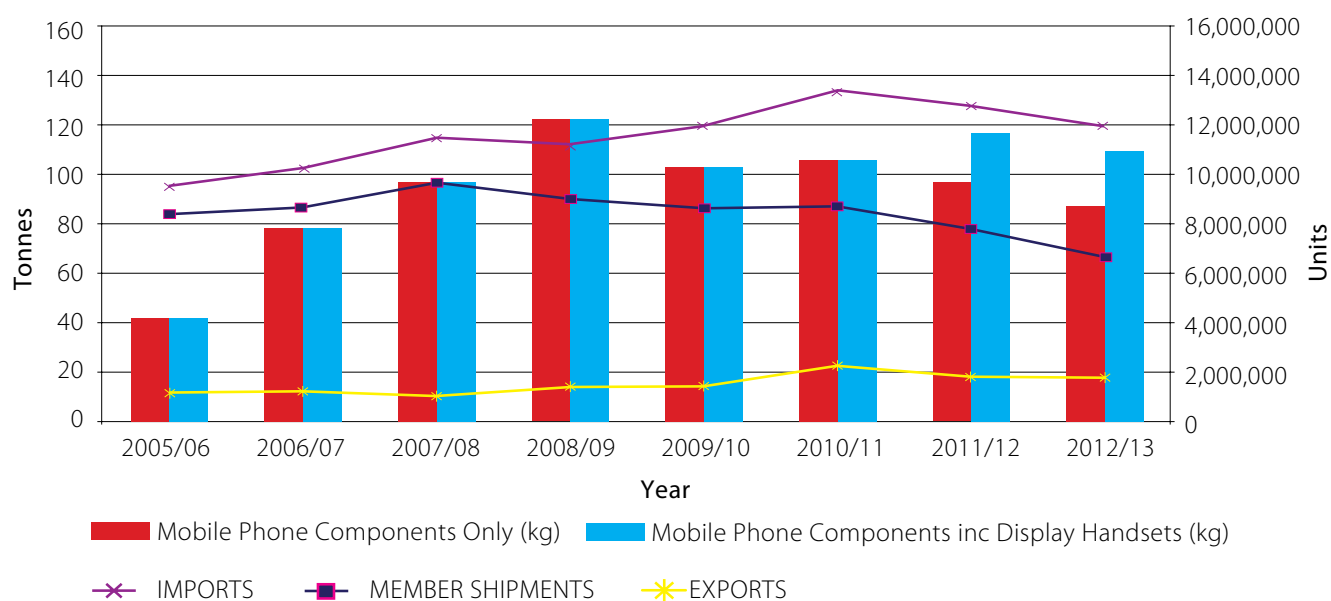
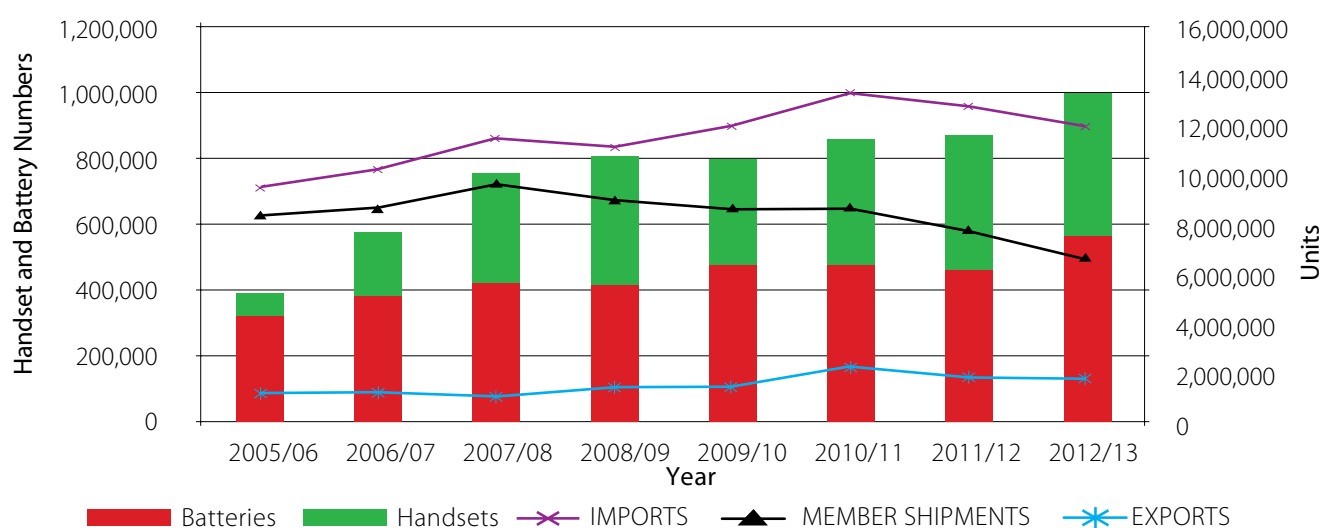
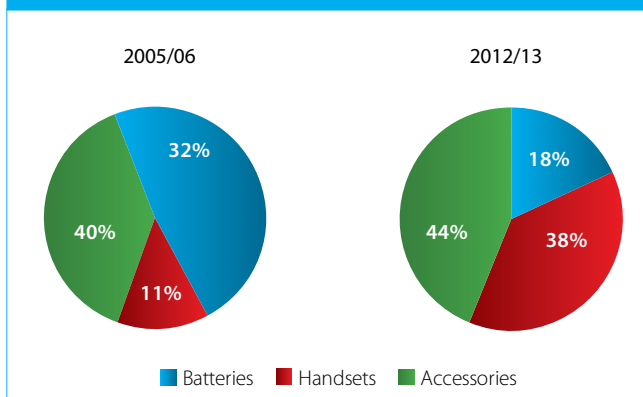


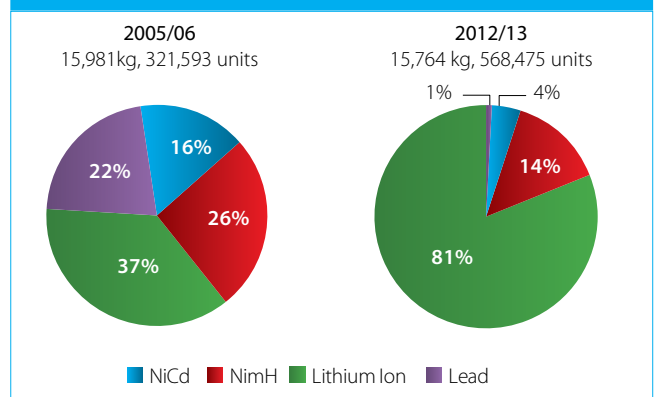
Figure 2: Total number of handsets and batteries collected (2005/06 to 2012/13)



Mobile Phone Components Collected



Battery Types Collected – % (by weight)



MobileMuster's Rose Read, American environmentalist Annie Leonard, science journalist Bernie Hobbs at the 2013 Sustainable Living Festival in Melbourne



MobileMuster was a proud sponsor of the 2013 Garage Sale. Attending the Melbourne launch of the Garage Sale Trail: Stan Krpan (Sustainability Victoria CEO); Hilary Harper (ABC Presenter); Andrew Valder (Co-founder GST); Tim O'Leary (Telstra on behalf of MobileMuster)

What is the recycling process?

MobileMuster's recovery rate of collected mobile phone components was 96%, which is up three percentage points from the previous year of 93%.

The mix of mobile phone components received over the past eight years has changed with more handsets being collected now than ever before. The amount of nickel cadmium batteries has also dropped substantially since 2005/06 with lithium ion batteries now representing 70% of batteries collected.

By recycling 87 tonnes of mobile phone components, MobileMuster will have diverted more than 199 kgs of cadmium and 226 kgs of lead from landfill, as well as recovered over 5.78 tonnes of plastic, 58 kgs of precious metals, 1.27 tonnes of aluminium, 1.78 tonnes of steel, 4.26 tonnes of copper and over 0.54 tonne of cobalt as raw materials to make new products, such as aluminium cans, batteries or plastic fence posts.

By recovering and reusing these resources

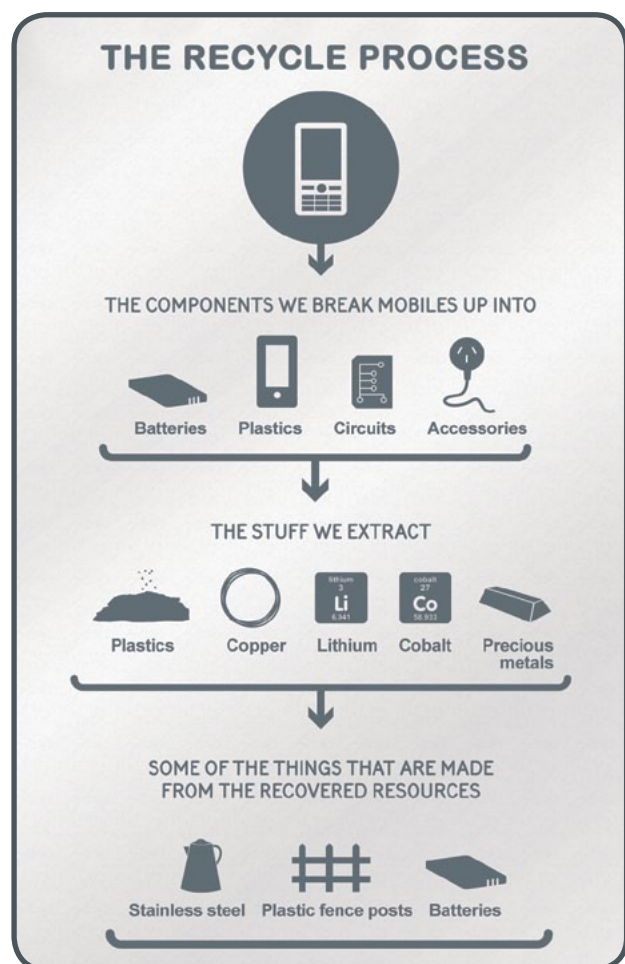
- around 2,270 less tonnes of precious metal ores (gold, silver copper) will need to be mined
- over 690 tonnes of CO2 equivalents in green house gases will be avoided, which is the same as taking over 190 cars permanently off the road or planting 4,240 trees.

How does the industry² measure success?

The majority of members of the mobile phone industry continue to actively support MobileMuster both financially and in-kind by promoting the program to their customers and staff online, through sales material and retail outlets.

Handset manufacturers that participated in the program in 2012-13 were Nokia, Samsung, LG Electronics, Motorola, HTC, Huawei and ZTE. Each of these manufacturers voluntarily pays an advance recycling levy of \$0.30 per new handset shipped into Australia to fund MobileMuster. LG Electronics ceased to participate in the program from 30 June 2013.

Together they represented 56% of the mobile phone handset market in Australia, down from 61% in the previous year.



² Industry participation is defined as the proportion of shipments for mobile phone handset manufacturers and revenue of mobile network carriers operating in the Australian mobile telecommunications market that contribute financially to the industry's mobile phone industry recycling program.



All mobile phone components are dismantled locally in Australia with 96% of the plastics and metals being recovered. All data is destroyed. Nothing is sold for reuse.

Australia's three network carriers - Telstra, Optus, Vodafone Hutchison Australia and resellers Virgin Mobile - continued to be actively involved and supported the program, along with battery importer Force Technology.

Each of the carriers pays \$0.12 per handset of their share of new handsets shipped into the country to fund MobileMuster. Battery importer, Force Technology also contributes \$0.10 per new mobile phone battery imported into Australia.

AMTA measures the performance of MobileMuster against nine key indicators measuring changes in consumer behaviour, industry involvement, collection and recycling rates and diversion from landfill (see Table 1).

Educating Youth

In 2012 MobileMuster continued to engage and educate Australia's youth through its National Schools Recycling Challenge in 2012, giving teachers the opportunity to bring sustainability and the importance of recycling to life.

Two hundred schools participated in the 2012 schools recycling challenge, collecting more than 5,700 old mobile phones and batteries for recycling. As a result more than 41 kilograms (kgs) of plastic, 1.4kgs of cadmium, 9.1kgs of aluminium, 500grams of gold and silver, and 30.4kgs of copper were recovered and diverted from landfill.

Congratulations to our 2012 National winners:

- Fulham North Primary from Henley Beach, South Australia, for collecting the highest number of mobile phones
- Smeaton Primary School from Smeaton, Victoria, for collecting the highest number of mobile phones per student.

Table 1: MobileMuster – Key Performance Indicators to 2013

KPIs for June 2013	Results @ June 2013
Consumer Behaviour <ul style="list-style-type: none"> • Increase awareness to more than 85%, up from 75% • Decrease disposal to landfill to less than 2%, down from 4% • Decrease personal storage rate of 2 or more phones to less than 18%, down from 32% 	83% 3% 37%
Industry Involvement <ul style="list-style-type: none"> • Maintain whole of industry participation greater than 90% 	91% carriers 56% manufacturers
Collections <ul style="list-style-type: none"> • Increase the annual collection for discarded (i.e. available) phones to over 65%, up from 17% • Increase the annual collection rate of net imports to more than 20% , up from 5.5% • Diversify collection methods to include free postage paid recycling satchels and kerbside recycling 	53.1% 9.0% ACHIEVED
Recycling <ul style="list-style-type: none"> • Maintain diversion from landfill rate greater than 90% • Maintain estimated recycling rate (i.e. materials recovered) greater than 75% 	99% 96%



There are more than 23 million unused mobiles lying in drawers going to waste. That's more than 2,450 tonnes of plastics and metals that could be turned into new products reducing our demand on natural resources



MobileMuster tubes can be found in all major mobile phone retailers including Telstra, Optus, Vodafone, Virgin Mobile, Allphones, Fone Zone and selected Dick Smith stores.



One of MobileMuster's new outdoor collection bins. These can be found at a number of Dropzone and Techcollect TV and computer collection sites creating a one-stop e-waste-recycling spot for the public.

Summary of key performance indicators @ 16th October 2013

Key Performance Indicators	2012-13 Actual/ (includes display handsets)	2011/12 Actual/ (13 months Jun 11–Jun 12) (excludes display phones)	2011/12 Actual (excludes display phones)	2010/11 Actual**	2010/11 Actual* (11 mths)	2009/10 Actual	2008/09 Actual	2007/08 Actual
Collections								
Mobile Phone Collections (tonnes)	87✓ (110)	123✓ (106)	117 (97)	106	100✓	103✓	122✓	97✓
Annual Collection Rate, Discarded Phones	53.1%✓ (66.8%)	49.5%✓ (42.5%)	51.4% (42.6%)	48%	52.3%✓	50.6%✓	35%✓	18.9%✓
Annual Collection Rate, Net imports	9%✓ (11.4%)	9.9%✓ (8.5%)	10.3% (8.5%)	8.6%	8.9%✓	7.9%✓	7.8%✓	5.5%✓
Estimated Number Handsets & Batteries	996,874	912,274	847,240	797,105	744,816	845,919	806,812	755,196
Reported Shipments	6.67 M	8.55 M	7.80 M	8.70 M	7.95 M	8.66 M	9.02 M	9.77 M
Exports (adjusted)	1.00 M	1.23 M	1.12 M	1.45 M	1.34 M	1.41 M	1.43 M	1.05 M
Net Imports (units)	5.67 M	7.31 M	6.67 M	7.25 M	6.61 M	7.63 M	7.90 M	8.87 M
Net Imports (estimated tonnes)	964	1,243	1,134	1,232	1,123	1,297	1,581	1,775
Recycling								
Diversion from Landfill	99%✓	97%✓	97%	100%	100%✓	100%✓	> 90%✓	> 90%✓
Recycling Rate (estimated material recovered)	96%✓	93%✓		>75%	>75%	>75%	> 75%	> 75%
Consumer Behaviour								
Personal Storage Rate (% users with 2 or more handsets at home)	37%	40%	40%	40%	40%	38%✓	32%✓	32%✓
Disposal to Landfill Rate	3%	2%	2%	4%	4%	3%✓	2%✓	4%✓
Awareness of Mobile Phone Recycling	83%	82%	82%	84%	84%	79%✓	79%✓	75%✓
Industry Participation								
Manufacturers	56%✓	62%✓	61%	64%	63%✓	72%✓	78%✓	85%✓
Mobile Network Carriers	91%✓	97%✓	97%	97%	97%✓	100%✓	> 95%✓	>95%#✓

* As at 30 June 2011

** Full 12 months 1 July 2010 to 30 June 2011

✓ Externally audited – go to <http://www.mobilemuster.com.au/news/annual-reports-publications/> to view the Annual Assurance Statements included in each MobileMuster Annual Report

With the introduction of a new Australian Curriculum in 2013, MobileMuster completely updated its Education Kit for primary and secondary schools to make teaching easier and learning more fun with a new range of interactive learning resources on product stewardship and the life cycle of mobile phones.

The comprehensive Teachers Guide is aligned to the new National Curriculum and includes:

- Links to key learning areas and general capabilities
- Fun and classroom ready modules for primary teachers
- Great resources for secondary Geography and Science Teachers
- Online extension and homework activities

The MusterKids Zone has a range of fun interactive resources for students and teachers:

- Games – to test student knowledge
- Videos – learn about the life cycle of mobile phones and how they are designed
- Calculators – measure what materials and end products that can be made from old mobile phones
- Downloads – factsheets, videos and poster building resources
- Send in their work – join our MusterKids community and be inspired by other schools

Working with Local Councils

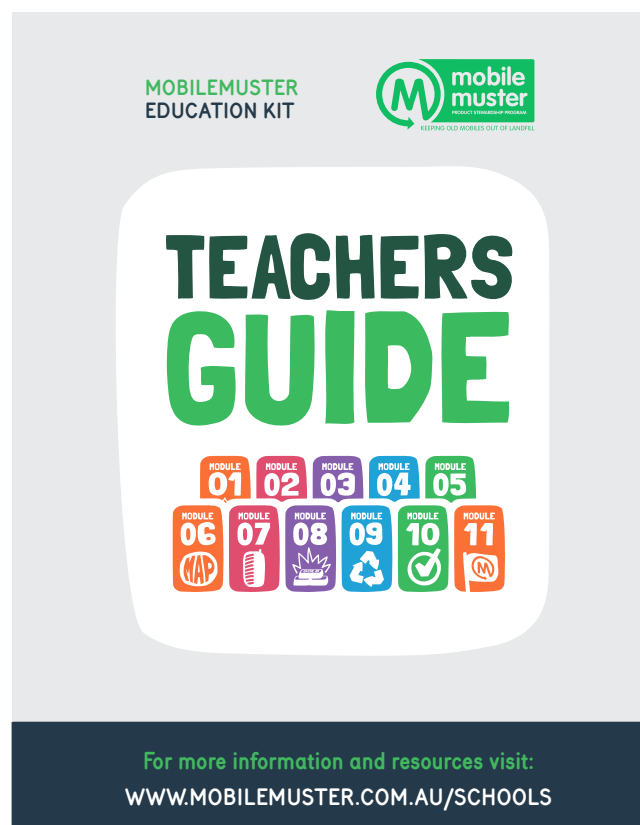
Local government plays a key role in MobileMuster with more than 340 councils across Australia hosting collection points and promoting mobile phone recycling to their communities.

To support councils in this role MobileMuster provides free collection units, promotional material and grants to promote recycling locally.

In recognition of the ongoing efforts of local councils across Australia in tackling mobile phone e-waste MobileMuster presented five awards at the Australian Local Government Association's National General Assembly in June this year.

The award winners were:

- **Best Promoter** – Camden Council (NSW)
- **Working with Schools** – The Hills Shire Council (NSW)
- **Top Collector Overall** – City of Monash (Vic)
- **Top Collector Per Capita** – Bruce Rock Shire Council (WA)
- **National Excellence Award** – City of Vincent (WA)



MobileMuster is the official product stewardship program of the mobile phone industry.



MobileMuster Local Government Awards 2013 winners with presenter Peter Fitzsimons and Rose Read, Manager Recycling, AMTA

Health and Safety

AMTA's Health & Safety Committee met monthly over the past year to discuss a range of issues that had the potential to raise community concerns about potential health impacts of mobile telecommunications.

The Committee reiterated its strong reliance on statements from independent safety experts, such as the World Health Organization (WHO) and the Australian Radiation Protection and Nuclear Safety Agency (ARPANSA), to provide the community with expert advice based on the body of scientific research.

Coverage

A clear trend this year has been the strong reportage in the media of the community's need for reliable mobile telecommunications coverage. Mobile telecommunications is improving communication, social inclusion, economic activity and productivity.

There was a 104 per cent rise to 8.67 million in smartphone take-up last year and demand for mobile data is doubling every year as customers adopt data-hungry smartphones, mobile modems and tablets. Mobile networks are investing billions of dollars in network infrastructure to meet this demand by providing reliable coverage and increased data speeds.

Network coverage, capacity and speed are critical factors in determining the standard of network performance and quality of customer experience.

Against this shift in public focus, the Health & Safety Committee this year has maintained its strong commitment to active community and government consultation at all



Health and safety issues are a priority for AMTA as underlined by their treatment on the front page of AMTA's new website, which prominently displays information. The AMTA fact sheets on health and safety issues were recently updated to reflect the latest research and the assessments of independent expert bodies, such as the World Health Organization (WHO).

levels to address concerns and facilitate the efficient rollout of mobile networks that deliver faster and more reliable mobile services to local communities.

The industry is mindful of balancing the national economic/productivity imperatives with concerns on the ground from local neighbourhoods about network deployment.

The Committee's community consultation commitment involves working with the Mobile Carriers Forum (MCF) to provide details of industry compliance with strict science-based safety standards through the best-practice information portal, the Radio Frequency National Site Archive (RFNSA),



AMTA recently launched a new website to encourage safe, responsible and legal use of mobile phones while driving. The site, *Keep your eyes on the road*, provides drivers with practical advice on how to use their mobiles in a safer manner using best-practice mobile phone technology to comply with all driving laws. The address of the new site is: <http://www.keepyoureyesontheroad.org.au/>

which provides a publicly accessible database of proposed network deployment. The public can find details of EME reports that show the predicted levels of electromagnetic energy (EME) of all new or upgraded facilities as well as compliance certificates and carrier contact details.

The Health & Safety Committee monitors, disseminates and, where possible, supports research on health and safety issues related to mobile telecommunications. Accurate science-based information will assist people to make informed choices about mobile technology and health.

The Health & Safety Committee provides the public with a comprehensive range of fact sheets, which were updated during the year, on EME-related health issues.

Children and EME standards

The Australian mobile telecommunications industry complies with strict science-based safety standards set by independent expert bodies, such as the WHO. The safety standards contain

large in-built safety margins that offer protection to all, including children.

Activists and media coverage in overseas publications have this year highlighted what they allege are the potential vulnerabilities of children to EME from mobile devices and base stations.

The Health & Safety Committee has reiterated that mobile handsets and base stations are designed, built and tested to comply with strict science-based standards and the mobile telecommunications industry is required to comply with Federal Government safety standards to obtain licences to operate.

Some activists have campaigned for reduced exposure limits in the period following the International

Agency Research on Cancer (IARC) classification of radiofrequency fields, claiming that children are more susceptible to radiofrequency EME because of thinner skulls and developing brains despite international exposure guidelines accounting for these factors with significant safety margins.

The Health & Safety Committee has worked this year to underline the key importance of standards being set on a science-based approach to avoid situations such as Brussels, which provides an example of the unintended and damaging impacts on mobile phone coverage when misguided policies are implemented.

The rollout of 4G was delayed in the Belgium capital following the decision of local government to implement safety standards 200 times stricter than those recommended by the EU and the WHO. The European Commissioner for the Digital Agenda, Neelie Kroes, said the Brussels' approach was "damaging the economy without protecting the population"

because the lower safety standards below international guidelines offered no additional protection.

The GSMA found that up to 40 per cent more base stations would be needed to maintain the quality of existing services.

The Australian Radiation Protection and Nuclear Safety Agency (ARPANSA) is reviewing the safety standard for exposure to radio frequency emissions from mobile phone technologies as part of its normal review process. In Australia, safety of mobile technologies is required by mandatory compliance of mobile phones and base stations with ARPANSA's radiofrequency radiation exposure standard.

Cumulative EME levels

The AMTA Health and Safety Committee worked on explaining the background and context to changing EME levels as mobile networks and technologies are deployed and upgraded around Australia. A huge rise in demand for mobile data services has resulted in technology and network upgrades and increasing EME levels.

Despite the rise in emissions from base stations the levels are still well below mandated safety levels, which the Federal Government regulator, the Australian Communications and Media Authority (ACMA) requires all carriers to comply as a condition to operate.

The Health & Safety Committee has highlighted the following points on this issue:

- The industry is open and accountable and the public has access to environmental EME reports for all base stations on the RFNSA, providing the maximum predicted exposure levels for any interested community member or stakeholder.
- All base stations must comply with independent safety limits set by ARPANSA and sites are audited by the Australian Communications and Media Authority (ACMA).
- Safety limits as a precautionary measure contain large safety margins (5000 per cent).

The Health & Safety Committee is working on this issue to ensure the public is informed of EME levels and reassured that the mobile telecommunications industry complies with mandatory Federal Government safety standards, which provide protection to the community.

Driving

The Committee established a driving sub-committee this year to deal with driver safety and mobile phone use. It was considered appropriate to broaden input into this issue from the policy expertise of the Policy and Strategy Steering Committee to supplement the EME focus of the Health & Safety Committee members.

This year's driving focus has entailed:

- Development of a social media strategy and a new driving website as part of AMTA's updated web presence. The new driving site is called: www.Keepyoureyesontheroad.org.au
- Engagement with law makers, including ministers for roads, police and transport and their advisers, to raise awareness of the range of driving safety issues to arrive at balanced positions and not adopt extreme calls for unenforceable bans of mobiles in vehicles
- Promotion of practical, common sense driving practices that show drivers how to comply with the law using best practice mobile phone technology. Drivers are faced with many mixed messages that tell them not to use mobiles (including a legal hands-free) but are not given key safety information on how to comply with driving laws and reduce risks associated with mobiles and driving.

AMTA continues to advocate that law makers and road safety authorities take into account the large body of research into driver distraction that shows mobile phones are only one of many distractions faced by drivers. Singling out mobiles is counterproductive because it distorts the comprehensive driving picture and can give drivers a false sense of comfort by downplaying other key distractions, which in many cases are shown to be more dangerous and cause more crashes.

AMTA liaised with Melbourne-based company, Yarra Trams, to develop safety tips for tram travellers using mobile phones to: "Pause – look, listen" when getting on and off trams.

Lost and Stolen

This year, which is the 10th anniversary since the Lost & Stolen program started, recorded a 4.2 per cent rise to 136,542 in net blocking in the 12 months to June 30, 2013, of mobiles reported lost or stolen. There are more than 10 million sales of mobile devices in Australia each year.

The small rise in net blocking this year is set against a strong downward trend over the past decade. The number of blocked mobile handsets has fallen by 20.9 per cent over the past 10 years since the Lost & Stolen program started in September 2003 to tackle mobile phone theft and send a strong signal of deterrence to thieves.

The mobile telecommunications industry's Lost & Stolen program blocks handsets reported lost or stolen from accessing all mobile networks in Australia. In the first full year of the program's operation in 2003-04 there were 170,000 net blocks. For the corresponding period 2012-13, there have been 134,450 blocks – a 20.9 per cent fall.

The figures provide strong evidence that thieves are getting the clear message that stealing mobiles is a waste of time because they would be blocked and made inoperable in Australia.

The program is run by the Australian Mobile Telecommunications Association (AMTA) on behalf of its members – Telstra, Optus and Vodafone. When a customer reports a mobile lost or stolen to their phone company it

is blocked using the handset's unique 15-digit electronic serial number, known as the International Mobile Equipment Identity (IMEI) number.

Handsets are blocked across all networks in Australia and cannot be used to make or receive calls or text messages. This prevents misuse of the handset and protects the owner from illegal call costs.

The 21 per cent fall has been achieved during a decade with an 86.5 per cent increase in the number of mobile phone services in operation.

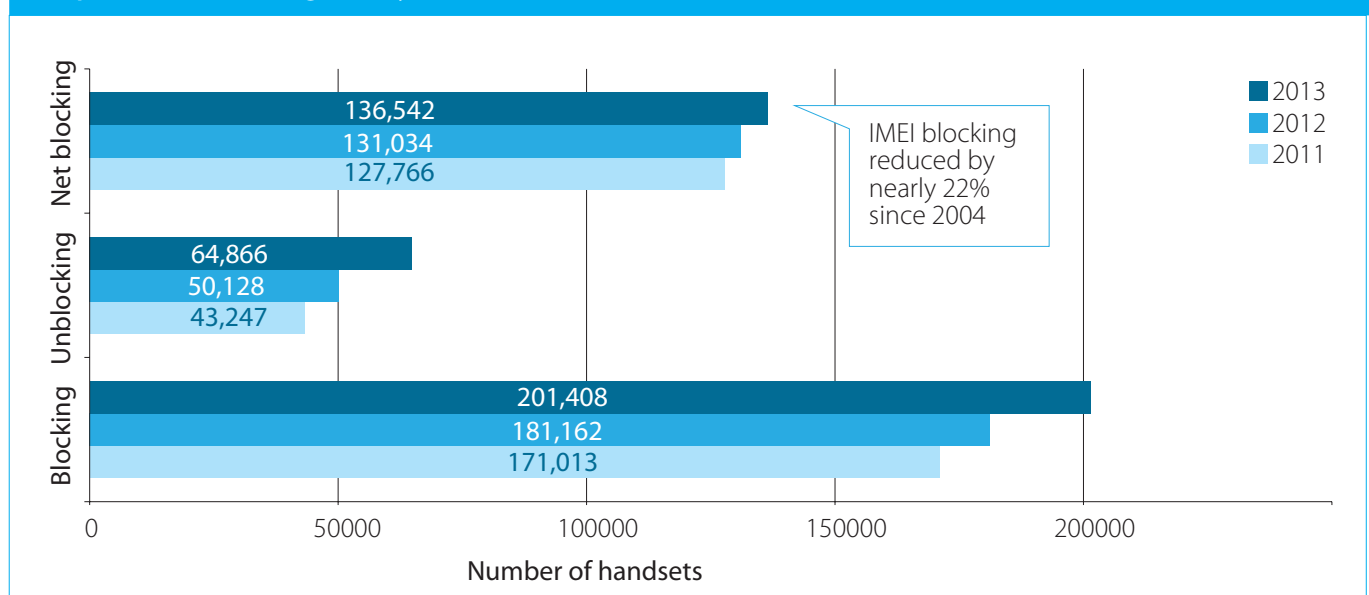
Mobile services in operation have increased by an average of 1.5 million a year over the past decade, rising from 16.2 million subscribers in Australia in 2004 (mobile penetration rate of 81 per cent) to 30.2 million mobile services in operation in 2013 (penetration rate of 130 per cent).

The very strong rise in mobile phone use during this period makes the 21 per cent fall in blocking all the more remarkable. It might have been expected there would have been a spike in reported thefts recently with the rapid uptake of high-value smartphones, however, this has not been the case.

The success of the AMTA program has attracted interest from other nations, including the United States, which are setting up similar programs to discourage thieves.

To find more about Lost & Stolen see www.lost.amta.org.au

Comparison IMEI Blocking Activity



AMTA Board and Staff

AMTA Board of Directors

Chair Warwick Bray – Telstra

Deputy Chair Josh Delgado – Samsung (*Resigned July 2013*)

Tyler McGee - Samsung (*Appointed July 2013*)

Sean O'Halloran – Alcatel-Lucent

Hakan Eriksson – Ericsson Australia

Timo Brouwer – Motorola (*Resigned May 2013*)

Danny Adamopoulos – Motorola (*Appointed May 2013*)

Steve Lewis – Nokia

Stephen McFeeley - Nokia Solutions and Networks

Sarah Pike – Optus

Matthew Lobb – VHA Pty Ltd

Finance & Audit Committee

Matthew Lobb (*Chair*)

Hakan Eriksson

Sarah Pike

Remuneration & Appointments Committee

Warwick Bray (*Chair*)

Josh Delgado (*Resigned July 2013*)

Sean O'Halloran (*Appointed July 2013*)

AMTA Staff

Chief Executive Officer Chris Althaus

Manager, Business Development Glenn Brown

Manager, Policy Lisa Brown

Manager, Communications Randal Markey

Manager, Office Renae White

MobileMuster

Manager, Recycling Rose Read

Manager, Channel Operations Spyro Kolofotias

Office/Program Co-ordinator Julia Diamond

Mobile Carriers Forum

Program Manager Ray McKenzie

Manager, Office / Executive Assistant Renae White

AMTA Board



Warwick Bray, Chair (Telstra)



Josh Delgado, Deputy Chair (Samsung)



Timo Brouwer (Motorola Mobility Australia)



Hakan Eriksson (Ericsson)



Steve Lewis (Nokia)



Matthew Lobb (VHA)



Stephen McFeeley (Nokia Solutions and Networks)



Sean O'Halloran (Alcatel-Lucent)



Sarah Pike (Optus)



Danny Adamopoulos (Motorola)



Tyler McGee (Samsung)



Steven McFarlane, Kaniva College, winners of the MobileMuster-sponsored ResourceSmart Waste School of the Year (Secondary) receives his award from Chris Althaus (AMTA CEO) & Stan Krpan (Sustainability Victoria CEO)



Peter McKeon, Executive Director, ZTE Australia; Glenn Brown, AMTA; Josh Delgado, AMTA, Deputy Chair (Samsung)



Chris Althaus, CEO, AMTA; Charlie Cheng, Director Industry Relations, Huawei Technologies Australia; Glenn Brown, AMTA; Dev Gupta, Director, Paradigm One; Stephen McFeeley, Managing Director, Nokia Solutions and Networks

