

2004 Annual Report

AMTA - Australian Mobile Telecommunications Association



Australian
Mobile Telecommunications
Association

PO Box 4309 Manuka ACT 2603 Australia

Phone: (02) 6239 6555

Fax: (02) 6239 6577

www.amta.org.au

ABN 98 065 814 315

Design and Layout by:



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1 AMTA – Statement of Purpose and Vision

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

AMTA's vision is to promote an environmentally, socially and economically responsible and successful 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, its key stakeholders and the wider community.
- Promoting an improved understanding of the mobile telephone industry and its contribution to the Australian community.

AMTA promotes mobile telecommunications applications in Australia for the benefit of all industry participants and users. Mobile telecommunications in Australia is a major industry. It contributes nearly \$5 billion a year to the Australian economy and employs more than 34,500 people.

From small beginnings, the mobile telecommunications industry today has about 16 million subscribers with an estimated mobile penetration rate of 80%.

AMTA represents, acts and communicates on behalf of industry to key stakeholders and decision makers: governments; regulatory authorities; consumer groups; and mobile users.

AMTA's members include:

- Mobile phone carriers and service providers.
- Handset manufacturers.
- Retail outlets.
- Network equipment suppliers and associated businesses.
- Specialised consultancy services.

AMTA's focus is wider than the economic bottom line. Mobile phones have had a marked impact on people's lives and AMTA is committed to providing practical assistance to users through such programs as recycling, lost and stolen mobiles and consumer tips.

2 Overview of the Australian Mobile Telecommunications Industry

The Australian mobile telecommunications industry has been a strong performer over the past 10 years and recent innovations provide a platform for continued strong performance.

The following indicators demonstrate the economic significance of the mobile telecommunications industry in Australia:

- Industry Gross Product for the Carriage Service Providers (CSP) sector in 2002-03 was \$4.8 billion.
 - Industry Gross Product (IGP) is a measure of the economic contribution of a specific industry to the economy or value added.
 - The contribution of the mobile telecommunications sector to the economy was larger than the free-to-air television services industry and also larger than the newspaper, printing and publishing industry. The contribution of the mobile telecommunications sector was almost one third of the entire accommodation, cafes and restaurants industry.

- The industry contributes substantially to government revenues through charges and levies and through the full range of Commonwealth and State generic industry taxes and charges.
 - It is estimated that on-going industry specific payments made by the mobile telecommunications industry to government are in the order of two per cent of revenue per year or \$178.2 million in 2003-04.
 - The industry has contributed almost \$2.9 billion to government through payments made to access spectrum.
 - The industry contributes to effective industry operation through payments, some voluntary and some compulsory, that support various industry associations and schemes, for example the Telecommunications Industry Ombudsman and the National Relay Service.

- Employment in the mobile telecommunications industry is growing.
 - Over 34 500 people worked in the industry (on a full-time, part-time or casual basis) in 2002-03. Over the period 1997-98 to 2002-03, employment in the mobile telecommunications industry increased by 48 per cent, compared to an increase of around 30 per cent in the telecommunications industry as a whole.
 - In 2002-03, the mobile telecommunications industry paid around \$1.2 billion in wages.
 - Mobile telecommunications accounted for over one third of total telecommunications employment in 2002-03. By comparison, in 1996-97, mobile telecommunication employees accounted for just under one quarter of total telecommunications employment.

- Capital expenditure by the industry has been substantial.
 - In 2003-04, the industry continued its capital expenditures to support new networks and expansions and upgrades to existing networks. This is in addition to regular operating expenditures.
 - Since 1997, capital expenditure on new networks has exceeded \$8 billion. These investments underpin expansions to mobile network coverage that make mobile services available to more people in more places as well as supporting the development of innovative services.

- Revenue in the mobile telecommunications industry exceeds \$8 billion annually.
 - An estimate of mobile telecommunications industry revenue for 2003-04 was \$8.8 billion.
 - In 2002-03, mobile revenue represented 28 per cent of total telecommunications revenue.



- Lynda O'Grady, AMTA President, Daryl Williams, the former Minister for Communications, Information Technology and the Arts, and Keir Preedy, AMTA Vice-President, at the Dinner for the Minister.



- Brent Gerstle, Optus, Michael Milligan, Mobile Manufacturers Forum, Bernie O'Shannassy, Motorola, at the Dinner for the Minister in Sydney last December

3 President's Report

Our industry is positioned for a renewed period of strong growth to capture the latest developments in mobile telephone technology.

The industry has constructed a strong platform for growth with the introduction of 3G mobile technology.

The growing impact and importance of our industry to the Australian economy has been measured in the latest industry report, which finds that Australia's mobile telecommunications industry contributes \$4.8 billion a year to the local economy.

The latest snapshot of the industry, undertaken by the Allen Consulting Group on behalf of the Australian Mobile Telecommunications Association (AMTA), finds a strong, vibrant industry employing more than 34,500 people with revenue of \$8.8 billion in 2003-04.

Our industry has a bigger economic impact on Australia than either the free-to-air television services industry or the newspapers, printing and publishing industry.

Peaks in subscriber growth have in the past been associated with the introduction of new networks, such as in 1993 when the 2G GSM network was introduced and in 1999 with the CDMA networks.

After a period of consolidation, the industry is poised for a new phase in growth over the coming years when the full impact of 3G services on mobile growth rates comes into effect.

AMTA has equipped itself to ensure that it continues its pivotal role in providing leadership and representation for its members on whole-of-industry issues. AMTA is reinvigorating itself to meet new challenges with a new Constitution to ensure it continues to deliver results for its members.

AMTA's renewed task and focus has been outlined for the next three years in the 2004-07 Strategic Plan, which provides a series of steps to build a stronger and more effective organisation for its members.

AMTA has demonstrated it is an innovative and forward-thinking organisation with its new social research project, which was launched at AMTA's Annual Congress in September.

To further understand the nature and extent of the impact of mobiles on our lives, AMTA collaborated with the Academy of the Social Sciences in Australia to produce a framework for an ongoing research program of three years or more. Nowhere in the world has such research been undertaken at peak industry level.

To fulfill its vision to promote an environmentally, socially and economically responsible and successful mobile telecommunications industry in Australia, AMTA undertakes a number of key programs:

- AMTA oversees the industry's mobile recycling program, which has, since it started in 1999, collected and recycled more than 250 tonnes of mobile handsets, batteries and accessories. The program, which is free to consumers and funded by a levy on the sale of new mobile phone handsets from participating manufacturers and network carriers, is entering a new phase with the incorporation of major corporations and government departments into the program.

They include: the Department of Communications, Information Technology and the Arts; the Australian Taxation Office; Toyota; and BHP Billiton Petroleum.

- The Australian mobile telephone industry introduced a world first, anti-theft technology which blocks lost or stolen mobile phones by using each phone's unique 15-digit electronic serial number. More than 200,000 mobiles have been blocked since the program started 12 months ago and AMTA recently introduced a new online inquiry service that makes it convenient for consumers and second-hand sellers to check if a mobile telephone has been reported lost or stolen and blocked from use by the network carriers.
- In the past year AMTA has worked to better educate and increase the awareness of consumers on a range of issues. This has included producing consumer tips on managing spending on mobiles and the appropriate use of camera phones. AMTA places great emphasis on the importance of assisting consumers to have access to the benefits of mobile phones in a financially affordable and responsible manner.
- AMTA made a submission to the Federal Government's Financial Literacy Taskforce, which considered ways to improve the financial skills of Australian consumers. AMTA supports the Taskforce's recommendations for a co-ordinated, nation-wide approach to improve the financial awareness of consumers, starting from school age. AMTA is considering working with education authorities to include a mobile phone module as part of an accredited consumer and financial skills course in schools.

I would like to thank my fellow Board members for their support, guidance and commitment over the past 12 months. We have positioned AMTA to ensure it remains relevant to the evolving needs of its members and it is well structured and resourced to face new challenges and opportunities of an innovative industry entering a new phase in its development that goes far beyond the traditional functions of making and receiving calls and text messages.

I also take this opportunity to thank AMTA's Chief Executive, Graham Chalker, and his dedicated staff for their commitment and diligence in delivering results for our members.

Our industry has much to be proud of. AMTA continues to serve the industry well. We will not rest on our laurels and we remain committed to promoting an environmentally, socially and economically responsible and successful telecommunications industry.



- AMTA President, Lynda O'Grady, Telstra Corporation, at the Dinner for the Minister in Sydney last December

4 Chief Executive Officer's Report

This year has been a particularly busy year for AMTA. We have faced and addressed a wide range of issues while the industry has continued to grow and contribute significantly to the Australian economy.

A key strength of our organisation is the ability to develop and present policies to improve the business environment of our members. AMTA also works closely with consumer and community groups to ensure it meets its corporate social responsibilities and serves the needs of customers.

At the very heart of AMTA's work is our committee system, which generates policies and positions on a range of whole-of-industry issues.

AMTA's committees are our organisation's engine room. They provide members with a mechanism to ensure the industry contributes to and shapes public policy debate by presenting a unified industry voice.

I take this opportunity to thank all committee chairs and members for their dedication, enthusiasm, insight and input in developing policies and positions which have stood our organisation and industry in good stead over the past year.

The committee structure reflects the gamut of our industry's issues, ranging across economic, social and environmental issues. The committees include: infrastructure; consumer issues; recycling; health and safety; lost and stolen; policy and strategy; and access for the disabled. The work of these committees will be detailed later in this report.

One area where the industry has faced criticism has been the issue of debt and high bills. AMTA made a submission on behalf of its members to the Australian Communication Authority's inquiry into unexpected high bills and credit management.

Our response provided a good example of the interdependency of financial matters with consumer-related issues, such as education and awareness. It underscores the importance of tackling issues not just in financial terms, but also looking at attitudes and the importance of providing practical information to help consumers make informed decisions.

We believe that credit management problems appear limited in size and scope. The competitive market has provided a solution with the growth of pre-paid phones which have been taken up with alacrity by customers. Imposing caps and using black letter law runs the risk of inconveniencing the majority of consumers and not necessarily helping the small number who are affected.

Our industry is already party to comprehensive co-regulatory codes of practice. Individual companies provide spending alerts to monitor unusual expenditure by customers.

AMTA's submission was cast in the wider social context of detailing the work we do to enhance awareness and sensible attitudes to money management that can help all consumers. Our submission details our steps to improve financial knowledge with our Consumer Tips; our work with the Financial Literacy Taskforce; our industry initiative to protect people from high bills by blocking their mobile phone if it is reported lost or stolen.

AMTA strongly believes our approach is balanced and effective.

Later this year, I am meeting with State Transport and Police Ministers and motoring organisations to discuss the issue of driving and mobile telephones.

AMTA has produced driving safety tips; drivers who adhere to these simple common sense practices can make full, productive and safe use of mobile phones while enjoying the substantial public safety and personal security benefits they provide. We are concerned that the debate in Australia has focused on mobiles at the expense of other distractions.

AMTA's Mobile Carriers Forum (MCF) has this year fulfilled its important charter to respond to community issues about the deployment of vital infrastructure for our industry.

With the introduction of 3G technology our industry faces new challenges in responding to some community concerns surrounding the siting of mobile phone base stations while ensuring that the community has adequate coverage to access vital new services.

One of the highlights of AMTA's year and the culmination of hard work and planning is our Annual Congress, which provides a forum for the industry to come together and to hear first hand of the latest issues and trends and to network with colleagues in the industry.

The Congress, held in Sydney, was very well attended. One of the highlights was the Roundtable with the four CEOs of the carriers. Our industry's leaders participated in a question and answer session which provided great insight on key issues.

Finally, I would like to thank AMTA's President, Lynda O'Grady, and the Board for their support and guidance during the year. I extend my gratitude to AMTA's staff for their diligence, dedication and professionalism.



□ AMTA CEO, Graham Chalker, at the Dinner for the Minister in Sydney last December

5 Highlights

Industry Member Focused:

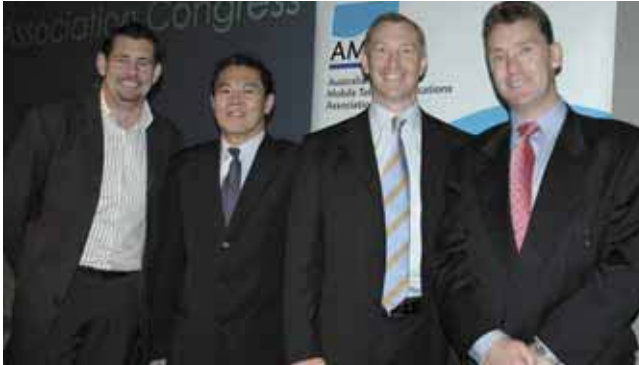
- **AMTA Member Forums** – AMTA provides members with networking opportunities. This year's Forums were addressed by: Lisa Tuffs, Business Development Manager, Ericsson Australia Pty Ltd; John Grant, Senior Executive Manager, Radiocommunications, Australian Communications Authority; Dr Richard Allen, Managing Director, Applied Financial Diagnostics Pty Ltd; Dr Graeme Woodbridge, Senior Telecommunications Analyst, CommSeC.
- **Member Communications** – The daily summary of Health and Safety issues goes to 50 members and receives positive feedback. AMTA's monthly enewsletter is circulated to 470 members and brings significant traffic to the AMTA website. The quarterly EME Update is circulated to more than 400 people from member companies, government agencies and the media.
- **Dinner with the Minister** – The then new Minister for Communications, Information Technology and the Arts, Daryl Williams QC, joined the AMTA Board and Members at a dinner in Sydney on December 17.
- **PM's XI** – The AMTA marquee at the Prime Minister's XI cricket match in Canberra on January 28, 2004, provided a great opportunity for AMTA members to meet with senior officials and ministerial staffers in an informal setting.
- **AMTA Congress** – About 150 people attended this year's AMTA Congress in Sydney on September 21-22. The two-day conference provided a timely opportunity for our industry to come together and get an update on legislative, regulatory and policy developments; to hear from CEOs of the carriers and manufacturers; to hear of the global economic outlook and trends in the mobile telephone industry.

Consumer Driven:

Economically Successful:

- **Industry Report** – Australia's mobile telecommunications industry contributes \$4.8 billion a year to the local economy and is positioned for strong growth opportunities with the roll out of third-generation technology. The report, undertaken by the Allen Consulting Group, found that the economic contribution of the mobile telephone industry in Australia is greater than either the free-to-air television services industry or the newspapers, printing and publishing industry.
- **Credit Management Inquiry** - AMTA made a submission to the Australian Communication Authority's inquiry into unexpected high bills and credit management. Our analysis shows that credit management problems appear limited in size and scope. The competitive market has provided a solution with the growth of pre-paid phones, which have been taken up with alacrity by customers. AMTA said imposing caps and using black letter law runs the risk of inconveniencing the majority of consumers and not necessarily helping the small number who are affected.

- **Industry Statistics** – AMTA released statistics on monthly sales of mobile handsets throughout the year. According to the latest figures for September, 2004, there were 5.87 million sales in the nine months of this year. This is a 45 per cent increase over the same period last year. Growth in pre-paid mobiles and people upgrading to the latest technology are two of the major drivers of the big rise in sales.



- The four Carrier CEOs at the AMTA Congress. Grahame Maher, Vodafone, Allen Lew, Optus, David Moffatt, Telstra, Kevin Russell, Hutchison

Socially Responsible:

- **Driving and Mobiles** – AMTA has embarked on a series of meetings with State Transport Ministers and chiefs of motoring organisations to advise them of the steps the mobile telecommunications industry is taking to alert drivers to the acceptable use of mobile phones while driving.
- **Social Research** – Australia's leading social scientists have joined with the mobile telecommunications industry in a world first to develop a research agenda to gain a wider understanding of the social impact of mobile telephones. The Academy of the Social Sciences in Australia joined with AMTA at the Annual Congress to launch a discussion paper setting an agenda for future research into the impact of the mobile phone on our society.
- **Lost and Stolen** – AMTA launched a new online inquiry service that makes it convenient for consumers and second-hand sellers to check if a mobile telephone has been reported lost or stolen and blocked from use by the network carriers. AMTA also welcomed new Federal Government legislation that makes it a criminal offence to “rebirth” stolen phones by illegally modifying a phone's electronic serial number.
- **Tips on Buying Your Mobile, Managing Your Mobile Spend** – Fulfilling its charter to promote a socially-responsible industry, AMTA has produced a number of Consumer Tips to offer step-by-step, practical help to consumers. These tips have been widely distributed to Federal authorities, State Fair Trading bodies, education authorities, consumer organisations and the media.
- **Disabilities** – Following the HREOC Forum held late in 2003, AMTA established its Accessibility (Disability) Committee. The Committee has developed an action plan to ensure that disability issues are considered as part of AMTA's consideration of all issues and to improve access to mobile services for people with disabilities. AMTA's website has been made accessible to people with a disability.

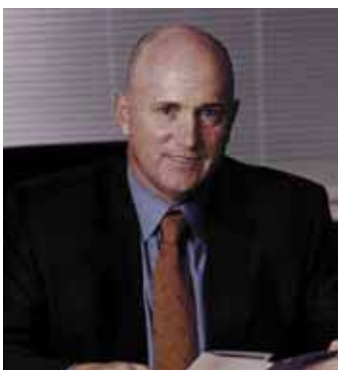
- **Financial Literacy Taskforce** – AMTA provided a submission to the Federal Government's Consumer and Financial Literacy Taskforce. We supported the objectives of the Taskforce to improve the financial skills of young Australians. AMTA proposes to work with education authorities to produce mobile phone material for use in the school curricula.

Environmentally Responsible:

- **Mobile Phone Recycling** – The mobile telephone industry continues to lead with its strong commitment to product stewardship. The recycling program collected 61 tonnes of handsets, batteries and accessories in 2003-04. This brings the total collection to 255 tonnes since the program started in 1999.
- **International Recycling Conference** - Environment Canada invited AMTA to present a paper at the Third National Workshop on Extended Producer Responsibility in Nova Scotia, Canada, in March. Following the presentation, AMTA was congratulated on its recycling program.
- **New Phase** – The Recycling Program is entering a new phase with the signing of major corporations and government departments. This year the Australian Taxation Office and the Department of Communications, Information Technology and the Arts joined the recycling program along with Toyota and BHP Billiton Petroleum.



- The Minister for Communications, Information Technology and the Arts, Senator Helen Coonan, gives the keynote address at AMTA's Congress in Sydney in September.



- AMTA Board Member, Alan Nicklos (Motorola)

6 Mobile Carriers Forum

Chair: Ros Young, Vodafone

Tanya Stoianoff

Executive Director

The Mobile Carriers Forum (MCF), comprising the four mobile phone carriers in Australia - Hutchison, Optus, Telstra and Vodafone - is responsible for addressing social and environmental issues within the policy, regulatory and operational environment associated with the deployment and operation of mobile phone networks. The MCF strives to ensure that the mobile carriers' industry as a whole addresses community and Government expectations in this area.

Internationally, the MCF is recognised as having developed and implemented world-leading policies and management tools for carriers in addressing social, environmental and carrier co-ordination issues in deployment. The co-operation between carriers in Australia in addressing these issues is second to none. Further, the MCF Executive Director presented a paper, "World Leading Practices of the MCF", at the Third EMF Biological Effects Conference in Greece.

The MCF's comprehensive work agenda has necessitated regular roundtable discussion on how industry delivers the deployment and operation of mobile phone networks, as well as enhances consultation with governments and the community. This past year, MCF committees, of which there are twelve, focused on key issues of concern to carriers and our community. Whether they are the regional forums addressing co-ordinated local network rollout in each state or national taskforces addressing key areas such as visual amenity, EME and regulatory codes, all have played an important role in developing policy and co-ordinated processes for the Australian industry.

MCF activities during 2003-04 included:

- Releasing the second edition of the MCF Guidelines for Better Visual Outcomes in an effort to set the benchmark for base station design while recognising the changing regulatory environment in which carriers deploy their networks.
- Responding to community concerns about base station deployment and related EME issues with ARPANSA through the provision of information, media statements, co-ordinated meetings and workshops for key stakeholders, such as local councils and Federal and State politicians.
- Completing the EME Rooftop Management Trial to test a co-ordinated process for the collation and communication of carrier facility information on non-carrier owned property. This Trial formed the basis of the MCF's EME regulatory compliance strategy which was collectively developed by the carriers. This resulted in a web-based system being used by all carriers and other radio licensees;

- Hosting a web-based management system to help Carriers implement the requirements of the new ACIF Code, entitled: "Industry Code for the Deployment of Radiocommunications Infrastructure" (the Code).
- Developing awareness at a State Government level of the importance of mobile phone infrastructure to business and communities in a carrier co-ordinated way.
- Working with State Government agencies to streamline processes for utilising existing state-owned infrastructure corridors for expanding carrier networks.
- Representing the carriers' views and policies in public forums and regulatory forums such as the review of the above mentioned Code.
- Delivering a comprehensive local and national media campaign promoting information on base station deployment, the regulatory environment in which carriers deploy, and the international position of authorities such as the World Health Organisation on EME and health.
- Providing a point of contact for community groups, councils, government, the media and other stakeholders in addressing issues related to infrastructure deployment in Australia.

In the pursuit of enhanced community consultation and industry co-ordination, the MCF has earned national political recognition and has demonstrated a vital ability to develop strong and supportive relationships with Federal and State Governments and politicians.

Local Councils have also welcomed the co-ordinated and co-operative approach from Carriers through one voice. However, the need for the MCF to continue to co-ordinate Carriers in working together to address community and environmental issues remains a key requirement and expectation from both government and the broader community.

Finally, MCF Chair Ros Young and her National Council have shown great leadership throughout 2004. Their tireless dedication to the Forum and its committees is testimony to the MCF's success.



- Front row: Brian Currie, Hutchison Telecoms, Michael Raj, NSW Department of State and Regional Development, Ros Young, Vodafone and Chair of the MCF National Council, Tanya Stoianoff, Executive Director, MCF. Back row: Andrew Harper, Abbott Consulting Group, Howard Game, Optus, Peter Zadien, NSW Department of Infrastructure, Planning and Natural Resources

7 Policy and Strategy Steering Committee

Chair: Georgia-Kate Schubert, Vodafone

David Higginbottom, Telstra (until July 2004)

AMTA's Policy and Strategy Steering Committee (PSSC) develops strategies which enable the industry to proactively manage issues in the policy, regulatory and community environment, and it acts as a clearing house for topical issues.

In the past year, PSSC has undertaken policy responses to a number of key issues, including:

- Content.
- M-Commerce.
- Credit Management.
- Emergency services, including the implications of GPS capability.
- Roaming.
- Taxation, reforming telecommunication specific taxes and charges.

Content:

A sub-committee of the PSSC was formed in late 2003 to examine issues relating to mobile content. The sub-committee has been extremely active, working with the Australian Communications Authority (ACA), the Australian Broadcast Authority (ABA), the Department of Communications, Information Technology and the Arts (DCITA), the Telephone Information Services Standards Council (TISSC), and the Internet Industry Association on issues relating to the regulation of consumer access to content services on mobile phones, including restricted and other premium rate and convergent services (eg operator branded portal services).

Credit Management:

A sub-committee was formed to respond to an ACA initiative on credit management issues. Two submissions were made: one in response to the proposed ACA Service Provider Determinations requiring information about premium services on the 19x number range and within proprietary networks to be made available to customers; and a second in response to the ACA's broader investigation of credit management measures in place within the industry.

AMTA's submission to the ACA's discussion paper argued that the existing regulation and self-regulation regime offers considerable consumer protection and that the competitive market is producing new products and services designed to assist various consumer segments manage their expenditure. ACA proposals for detailed additional regulation are not warranted and would not be effective. The submission is available at: www.amta.org.au – Reports.

Statistics and Information:

The PSSC has been investigating the need for more up-to-date and relevant statistics on the mobile telecommunications industry. AMTA responded to an Australian Bureau of Statistics review of the Information, Media and Telecommunications sectors.

AMTA argued the need for specific information on the mobile telecommunications industry given the growth and increasing importance of mobile telecommunications to the Australian economy. AMTA also argued that the significant data given by the industry to the Australian Communications Authority could be used by the ABS to ensure that data requirements on the industry are minimised.

AMTA has been invited to participate in an ABS reference group to determine the content of upcoming relevant ABS surveys.

M-Commerce:

The PSSC provided a submission to the Standing Committee on Consumer Affairs (comprising Commonwealth and State officials) on "Considering the implications of M-Commerce – A consumer perspective". In its paper, AMTA argues that M-Commerce is a sub-set of E-Commerce and, accordingly, should be considered within the existing regulatory framework for such transactions.

AMTA Contact: Peppi Wilson, Manager Policy



- John Grant, ACA, Georgia-Kate Schubert, Vodafone, John Kranenburg, SPAN, Brian Currie, Hutchison Telecoms, at the Dinner for the Minister in Sydney last December.



- Dr John Beaton, the Executive Director of the Academy of the Social Sciences in Australia, holds the discussion paper setting an agenda for future research into the impact of the mobile phone on our society at AMTA's Congress in Sydney in September.

8 Health and Safety Committee

Chair: Brent Gerstle, Optus

AMTA's Health and Safety Committee responds to issues regarding the health and safety of mobile telecommunications.

EME:

AMTA has continued to provide an industry response to the many research findings published during the year. Particularly notable during the year have been the findings of United Kingdom, Swedish, Netherlands and Nordic independent experts whose studies found that exposure to radiofrequency fields from mobile phones and their base stations do not cause any adverse health consequences.

Mobiles and Safe Driving:

One of the major issues in the media during the year has been the use of handheld mobile phones while driving. AMTA has undertaken a series of meetings with State Transport Ministers and heads of motoring organisations to advise them of the steps the industry is taking to alert drivers to the appropriate and safe use of mobiles while driving. We have actively promoted our 10 driving tips through the media, industry specific publications and occupational, health and safety outlets.

Member Communications:

Daily EME Reports are distributed to keep AMTA members up-to-date on health and safety issues making headlines in the media. The service allows members to be kept informed of the latest media developments, allowing them to be prepared to manage key issues affecting them. The EME Quarterly Updates, which summarise the latest research findings, have been distributed this year to more than 400 members, MPs, government officials and the media.

Social Research Project:

AMTA has worked with the Academy of the Social Sciences in Australia to produce a discussion paper setting an agenda and framework for future research into the impact of the mobile phone on our society. Nowhere in the world has such research been undertaken at peak industry level.

AMTA's President, Lynda O'Grady, launched the discussion paper at AMTA's Annual Congress on September 22. She said AMTA was excited and proud to have partnered the Academy on this project, which has brought together independent, eminent academics in a wide range of disciplines. The project is expected to lead to new and powerful insights into the impact of mobile phone technology on the way we live, the way we work and the way we play.

AMTA Contact: Graham Chalker, Chief Executive Officer

9 Consumer Committee

Chair: Michelle Curtis, Optus

The Consumer Committee responds positively and proactively to consumers' concerns regarding mobile phones.

Financial Literacy Taskforce:

AMTA made a major submission to the Federal Government's Consumer and Financial Literacy Taskforce, chaired by Paul Clitheroe. AMTA supported the need for a co-ordinated, national approach to improved financial awareness for consumers, starting from school age. AMTA said it would work with a national body proposed by the Taskforce and with education authorities to produce mobile phone material for use in school curricula, as well as advice to the wider public.

Consumer Information Guides:

As part of a consumer education campaign to address consumer debt issues, the Consumer Committee prepared two documents to help consumers choose a mobile phone that best suits their needs and to help them gain access to the benefits offered by mobiles in a financially affordable way.

The two documents: "Tips on Buying Your Mobile" and "Tips on Managing Your Mobile Spend", provide a step-by-step guide to choosing a mobile phone plan to suit the particular needs of the consumer and advice for people to manage their expenditure on mobile services to avoid getting into financial difficulty.

These documents have generated considerable interest in the community. They were distributed widely to stakeholders and have been the subject of media articles throughout the year.

The Consumer Committee is working with the New South Wales Commission for Children and Young People on new versions of the Tips to be targeted at young people.



- Michelle Curtis, Optus, Matt Stafford, Minister's Office, Luisa Ford, Optus, at the Dinner for the Minister in Sydney last December.

Mind Your Mobile Manners:

AMTA's guide on the dos and don'ts to conform with acceptable use of mobiles in social situations was distributed widely to industry associations, government departments, local governments and entertainment bodies.

Guidelines for Use of Camera Phones:

A separate consumer tips sheet was released for the use of camera phones to help ensure privacy is respected and people use them in a responsible way. The tips emphasise that camera phones can be a fun way to capture, save and send pictures so users can share important moments with friends and family. However, people need to be aware of situations that might not be appropriate to take photographs. The guidelines request camera phone users respect the privacy of others and ask permission before taking an individual's picture.

Bullying:

Unfortunately, some bullies use mobile phones to send insulting, threatening or unpleasant voice, text and picture messages. AMTA is working on a new guide to help victims of bullying. This follows AMTA's Developing an Acceptable Use Policy for Mobile Phones in Your School template document, which has been widely distributed to schools and education authorities throughout Australia, and for which AMTA continues to receive requests.

All AMTA's "Consumer Tips" are available on its website – see: www.amta.org.au – consumer tips.

AMTA Contact: Peppi Wilson, Manager Policy



□ AMTA Board Member, Alexander Lambeek (Nokia Mobile Phones Australia).

10 Mobile Phone Recycling Committee

Chair: Ramana James, Vodafone

Product stewardship is in its infancy in Australia. However, the mobile telephone industry has taken the lead and our industry's strong commitment to product stewardship is underscored by the Mobile Phone Industry Recycling Program.

This program has established itself as a world leading environmental "take-back" program, which provides an effective recycling option for mobile hardware, preventing disposal in landfills.

AMTA's Recycling Program collected 61 tonnes of handsets, batteries and accessories in 2003-04. This brings the total collection to 255 tonnes since the program started in 1999. This equates to more than 1.5 million batteries and handsets being recycled and not dumped in landfills.

During the year the Recycling Committee undertook an intensive review of the program and refined the strategy for the next three years to ensure the program is efficient and effective. The three-year operational plan will be the blueprint for an expanded program.

Greater emphasis will be placed on expanding the collection channels to ensure we achieve a national collection network capable of delivering a program that is consistent with a sustainable industry that takes responsibility for its outputs by capturing a significant amount of mobile phone and accessory waste.

The Committee has decided to undertake a major consumer research survey to better understand consumer awareness levels and key consumer issues. This will be used to inform and develop a marketing campaign with the aim of increasing collections.

AMTA will continue to encourage improved environmental outcomes by contributing to the development of effective product stewardship policy and programs, participating in industry education programs and forums, and supporting environmental initiatives from government and other stakeholders.

AMTA Contact: Glenn Brown, Manager Business Development



□ Ramana James, Vodafone, Glenn Brown, AMTA, Paul Johnston, Vodafone, at the PM's XI Cricket Match in Canberra.

11 Lost and Stolen Committee

AMTA's Lost and Stolen Committee identifies and develops short, medium and long-term strategies to assist in the prevention of mobile phone theft. In addition, the work group utilises statistical information to monitor and report on the success of the program.

Inter-Carrier Blocking:

September 15 marked the first anniversary of inter-carrier IMEI blocking. Over the 12 months to September 2004, 215,000 mobiles have been blocked, with 46,000 subsequently being unblocked. This represents a 21.3% recovery rate.

The Victoria Police in August issued a media release giving that State's latest crime statistics for the theft of mobile phones. In 2002-03, the theft of mobiles decreased from 7861 to 6962. The Victoria Police said that since the inter-carrier IMEI blocking, the theft of mobile phones had been reduced.

New Online Phone Check:

AMTA launched a new online inquiry service that makes it convenient for consumers and second-hand sellers to check if a mobile telephone has been reported lost and stolen and blocked from use by the network carriers. This provides consumers with a quick and easy way to check on the status of a mobile phone. People can have confidence that a mobile phone they are buying has not been reported lost or stolen.

Rebirthing:

The Senate passed the Crimes Legislation Amendment (Telecommunications Offences and other Measures) Bill (No.2) 2004 at the end of August. This new law provides for jail terms of up to two years for the rebirthing of stolen mobile phones. This will assist Law Enforcement Agencies and the industry to tackle the offenders and further strengthen the mobile theft prevention initiative.

AMTA Contact: Glenn Brown, Manager Business Development



- Steve Broderick, Broadcast Australia, David Havyatt, AAPT Ltd, Adrian Crouch, Ericsson, Takeo Kobayashi, Sony Ericsson, at the Dinner to Meet the Minister in Sydney last December.

12 Accessibility Committee

Chair: Bert Ciavarra, Telstra

Margaret Portelli, Telstra (until July 2004)

AMTA's Accessibility Committee enhances disability awareness among AMTA members and develops and disseminates consumer information for people with a disability.

In late 2003 AMTA established its Disability (later renamed Accessibility) Committee. The Committee has prepared an AMTA disability action plan as a framework for AMTA's work with members and disability organisations. Objectives are to:

- Increase members' awareness of disability issues including overseas developments.
- Ensure that disability issues are considered as part of AMTA's consideration of all issues.
- Improve access to mobile services by persons with disabilities.

In particular, AMTA is working with disability organisations to develop:

- A whole-of-industry good practices guide for its members seeking continuous improvements for customers with disabilities accessing mobile equipment, services and information.
- Questions for people with disabilities to ask their service provider, and other appropriate consumer tips.
- A disability advisory and information page on the AMTA web site.

The Committee's current members are drawn from the major carriers, service providers and handset manufacturers. It is advised by Gunela Astbrink, a prominent contributor to TEDICORE (Telecommunications and Disability Consumer Representation) and the Disability Advisory Body of ACIF.

AMTA Contact: Ian Booth, Policy Consultant



- Bert Ciavarra, Robert Morsillo, David Higginbottom, Paul Crisp, Karen DeVilliers, all Telstra, at the AMTA Congress.

13 AMTA Board

President

Lynda O'Grady

Telstra Corporation

Vice President

Keir Preedy

Singtel Optus

Treasurer

Steve Wright

Hutchison Telecoms

Directors

David Havyatt

AAPT Ltd

Barry Borzillo

Ericsson Australia Pty Ltd

Alan Nicklos

Motorola

Shaun Colligan

Nokia Mobile Phones Australia

Andrew Young

Alcatel Australia

Peter Stiffe

Vodafone Australia Limited

David McMahon

Fone Zone

Retiring Board Members during 2004

Alex Lambeek

Nokia

Rocco Arico

Alcatel

Jeffery Wang

Chatswood Mobiles



- Back row: Andrew Volard (alternate for Alan Nicklos), Motorola, David McMahon, Fone Zone, Andrew Young, Alcatel Australia, Peter Stiffe, Vodafone, Barry Borzillo, Ericsson Australia, Prem Chand (alternate for Alex Lambeek) Nokia. Front row: David Havyatt, AAPT, Keir Preedy, Optus, Lynda O'Grady, Telstra, Steve Wright, Hutchison Telecoms. Absent: Alan Nicklos, Motorola, Alex Lambeek, Nokia.

14 AMTA Staff

Chief Executive Officer

Graham Chalker

Manager, Business Development

Glenn Brown, Sydney

Manager, Communications

Randal Markey

Manager, Policy

Peppi Wilson

Manager, Office and Member Services

Ann Wellsmore

Policy Consultant

Ian Booth

Research Officer

Fiona McAlister

MCF

Executive Director

Tanya Stoianoff, Sydney

Executive Assistant

Amy Myers, Sydney

15 AMTA Members

Carriers/Service Providers

AAPT Limited
 Hutchison Telecoms
 Singtel Optus
 Telstra Corporation
 Vodafone Australia Ltd

Manufacturers

Alcatel Australia
 Ericsson Australia Pty Ltd
 NEC Australia Pty Ltd
 Nokia
 Motorola
 Panasonic
 Samsung
 Sony Ericsson
 Siemens

Retailers

Chatswood Mobiles
 First Mobile
 Fone Zone
 Mobile Network
 Paddington Phones

Support Industries

Accenture	m.Net Corporation
Alan Temling & Associates	NGA Software
AusAccess	Paradigm.one
CPS Global Limited	RF Industries
Intelematics Australia	Secure Sentinel
KPPR	Sema Australasia
Lucent Technologies	Sinclair Knight Merz



- David Havyatt, AAPT Ltd, Greg Armstrong, AAPT Ltd, Bill Spain, Vodafone, Peter Stiffe, Vodafone, at AMTA's Dinner to meet the new Minister in Sydney last December



- Aleem Khalid, Nokia, Dr Ken Joyner, Motorola, John Hewitt, AusAccess, Kelly Parkinson, kppr, at the Dinner to Meet the Minister in Sydney last December



- Jean-Pierre Bienaimé, Chairman, The UMTS Forum Europe. He gave the international keynote address at AMTA's Annual Congress in Sydney in September.