

Mobile Partnerships

Wikipedia Zero

Quarterly Review
March 5, 2014

Context

- Transition/ramped up
 - Team: added Carolynne, Ingrid, Adele; lost Kul
 - Refined processes, built relationships with partners
 - Strategy/plan shaping up
- Launches
 - Pipeline shows program gaining momentum
 - Responsive more than proactive
- CSR / PR potential

Agenda

I. Results YTD

- Launches
- Carrier marketing
- Page view metrics
- Technology
- SMS pilot

II. FY Q4 Priorities

- Target metrics
- Framework
- Regional strategies
- Product roadmap
- Other priorities

RESULTS YTD

2013-2014 Goals

- 35 million free page views per month
- Sign up at least two major partners, 20 countries
- Improved operations, faster launches, scalability
- Implement portal
- Explore USSD/SMS and J2ME

Currently launched in 23 countries with 27 operators



Goal: launch 20 new countries, 2 groups

YTD: 12 operators in 7 new countries, 1 group

Operator	Country	Group	Launch Date
Aircel	India		July 25, 2013
Orange	Madagascar	Orange	Sept 21, 2013
Umniah	Jordan		Sept 29, 2013
Banglalink	Bangladesh	VimpelCom	Oct 6, 2013
Airtel	Kenya	Airtel Africa <i>new</i>	Oc 24, 2013
Tcell	Tajikistan		Nov 29, 2013
Beeline	Kazakhstan	VimpelCom	Nov 25, 2013
Grameenphone	Bangladesh	Telenor	Dec 16, 2013
Babilon-Mobile	Tajikistan		Jan 15, 2014
MTN	South Africa		Feb 28, 2014
Safaricom	Kenya		March 1, 2014

Pipeline

- 3 partners signed, launching soon
- 25 in pipeline
 - 3 potential group deals
 - 10 very active

METRICS

Reach

Signed partnerships potential reach of **750M**

Launched partners reach **417M** subscribers

% Internet enabled *TBD* - so using **300M** estimate

Goal: 35 million monthly page views

57.65 Million

Mar 13 — Mar 14 1786.22%

Feb 14 — Mar 14 3.13%

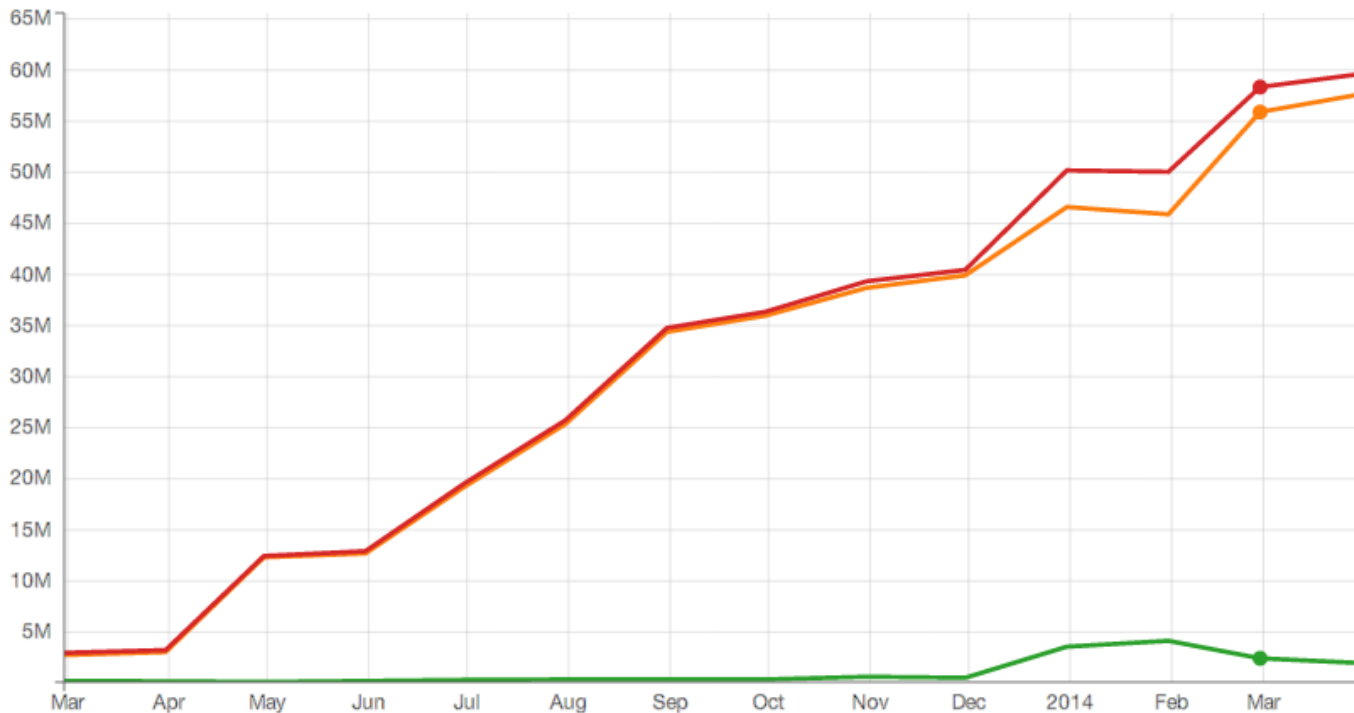
Monthly Mobile Traffic by Version

Feb 28 2014

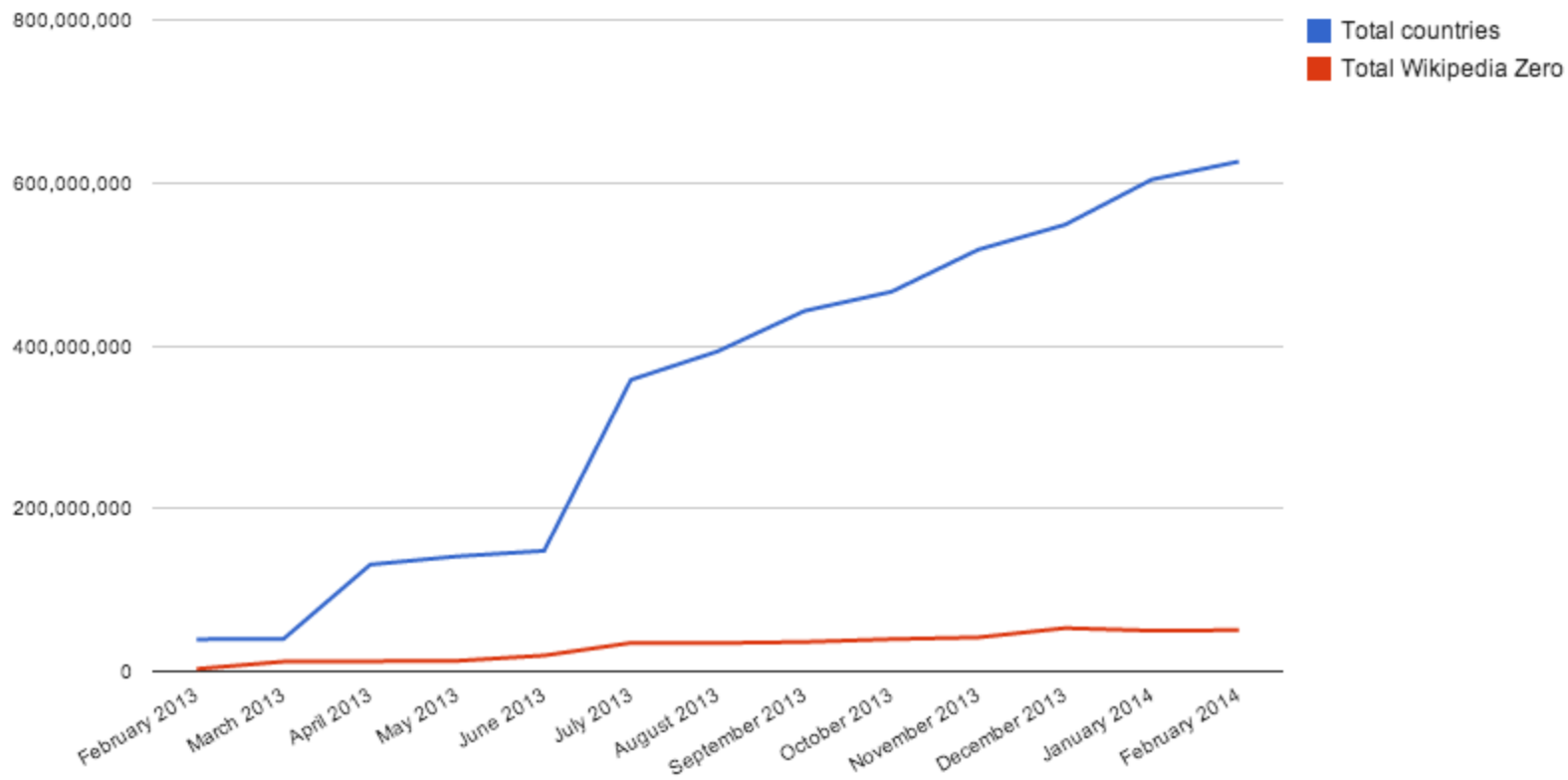
Monthly Mobile
Traffic by Version,
M 55.90M

Monthly Mobile
Traffic by Version,
Z 2.44M

Monthly Mobile
Traffic by Version,
All Versions 58.34M



Total Page Views in Wikipedia Zero Countries



Technical accomplishments

- IP Whitelisting
- Opera / Proxy support
- Mobile App support
- SMS Pilot

IP Whitelisting

- Benefits
 - Enables Zero-rated HTTPS
 - Reduces whitelisting updates from ‘URL creep’
 - Encompasses all languages and Wikimedia projects
- Status
 - Scheduling updates with all partners to migrate
 - Pushback from partners to keep URL whitelisting

Opera Mini support

- Cooperation simplifies support and maintenance of partner whitelisting
- Opera is widely used in developing world
- Data compression is important to carriers
- Local language support critical in some markets

Mobile Apps

- Firefox OS
 - Preinstalled
- Android & iOS reboot are zero-aware
- J2ME

Why SMS?

- Expand reach
- Grow Wikipedia awareness
- Drive Wikipedia Zero usage

SMS - Reach

- ~ 90% of subscribers in Africa don't use data
 - Basic phones
 - User behavior - opportunity to migrate
- Compatible with every cell phone
- Fundamentally aligned with our mission to reach every person on the planet

SMS - Grow Wikipedia awareness

- Addresses deterrents to discovery and usage
 - Prepaid plans per MB
 - Small phones on slow networks
- Get carriers to promote Wikipedia
- Reach people where they live

SMS - Drive Wikipedia Zero usage

- User behavior is often stuck with voice & SMS
- Carriers want to encourage internet use
- Move users to better Wikipedia experience

SMS Pilot Goals

- Improve technology
- Determine and resolve integration pain points
- Understand and improve user experience
- Package it up for scale, open source

SMS Pilots

First Pilot

- Nov 2013 - present
- Airtel Kenya
- Test tech integration
- Obtain usage data

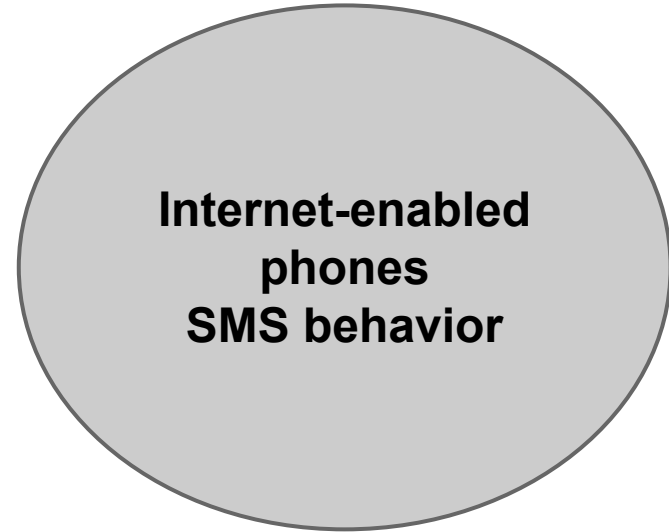
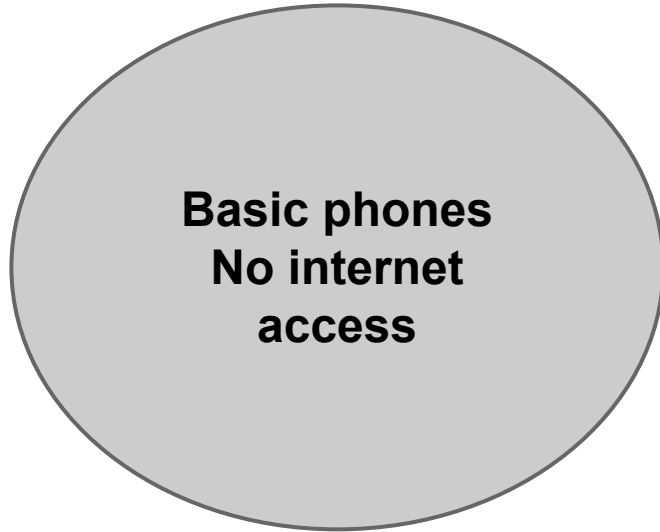
Second Pilot

- April - June
- Add hyperlink
- Scale up usage
- User research
- Pkg open source

Third Pilot

- August - Oct
- SMS only

Two User Segments



Dual Product Strategy

First Pilot Preliminary Results

- **Technology**
 - Peak usage / overcapacity issue
 - Praekelt conducted load testing for servers
 - Stress test indicates load problem with Wikipedia search engine

Summary

- People are reading Wikipedia via text
- There is a start to organic growth

Scaling Wikipedia via text: Options

WMF sanctioned


- WP Zero partners
- Praekelt integrates and hosts
- *Affordable plan*

MediaWiki+Vumi Open

- Other vendors can use source code
- Generate WP Zero BD leads

MediaWiki Open

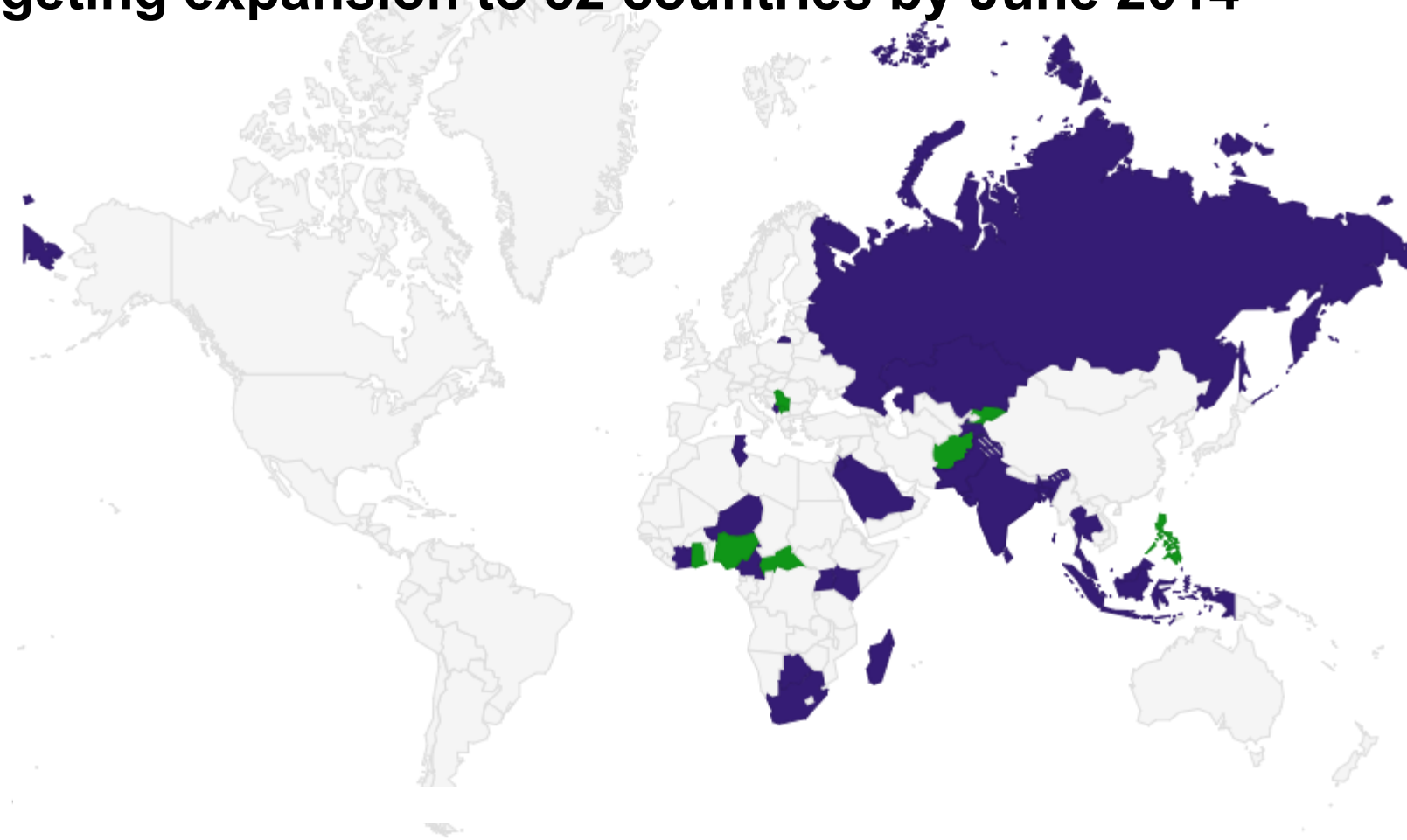
- No partnership
- Standard terms



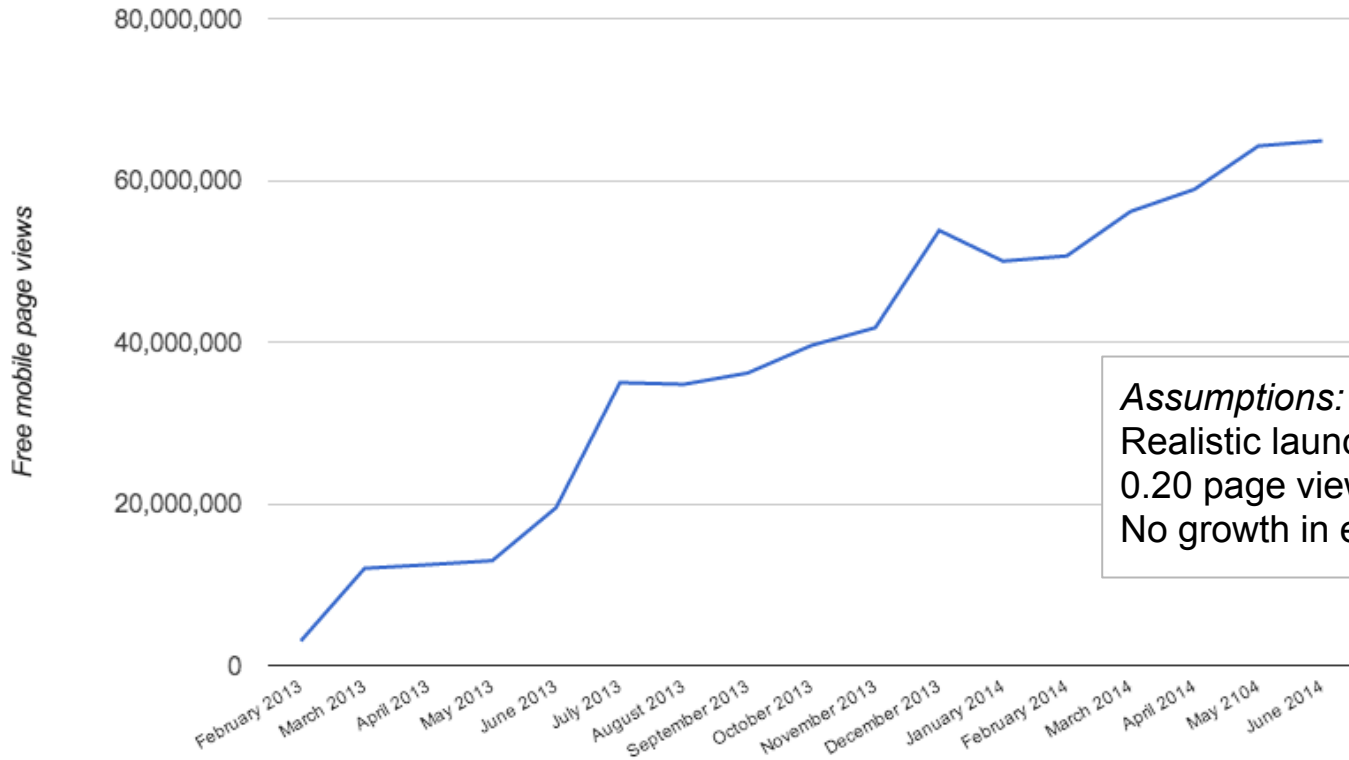
*Support open source movement
Scale faster to serve billions of people*

FY Q4 PRIORITIES

Targeting expansion to 32 countries by June 2014



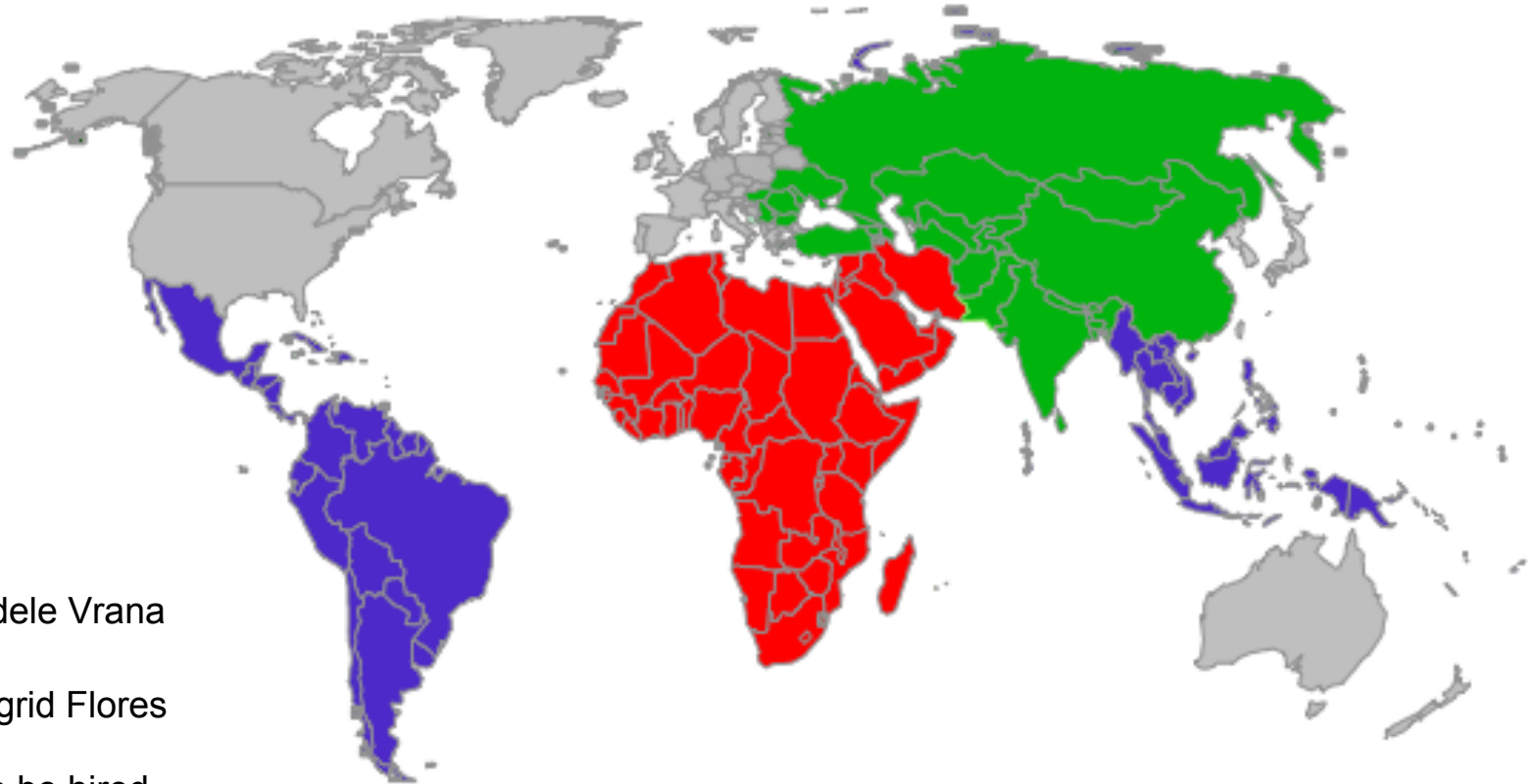
Wikipedia Zero Page View Projections



Assumptions:

- Realistic launch list
- 0.20 page views/subscriber average
- No growth in existing operators

Regional strategies for partner/country development



-  Adele Vrana
-  Ingrid Flores
-  To be hired

Partner segmentation

1. Priority Countries

- Reach and page views
- Deep dive on market development

2. Group OpCo's

- Prioritize reach, CSR, strategic markets
- Support all (portal)

3. Inbound requests

- Motivated, mission aligned
- Generally smaller operators (portal)

Country Segmentation

Mobile market development

		2G/basic phones	3G/smartphone growth
<i>Languages spoken</i>	Small WP	South Asia	South East Asia CIS
	Major WP	Africa	Russia Latin America Middle East

** Generalizing about the regions for discussion; countries will vary.*

Initiative	Countries	Dependencies
Account clean up	All	Ops
zerodot → mdot	2G	Reduce page weight
Speed dial, promos	Opera Mini operators	
App preloads (or web bookmarks)	3G/smartphones	Zero-aware apps Start page Android 2.x support
Wikipedia Text	2G	Pilots 2-3
Operator CSR	Selected operators	Comms manager Marketing templates
NGO's, ecosystem	Deep dive countries	

PHONE DOCTOR



- Serving every person
- Free speech
- Open source
- Transparency
- Trademark stewardship



Potential Approaches

Wikipedia Zero	Opera Only on Zero	Other Promotions
3 year CSR	1 year Speed dial	2-3 months Promoted
Mission	Reach	Awareness
Full Zero implementation	Zero WMF, easy for carrier	We do no work
PR	PR	No PR
TM	TM	No TM
No carrier support	Cannibalizes Zero (high)	Cannibalizes zero (low)



Wikipedia Zero for Asia & LATAM

If we have to reach EVERYONE, where do we start?: Triage Approach

Try to match

Who needs it most?


Countries that have:

- A large segment of the population in education years
- Low GDP per capita (e.g.: paying for data access IS hard)
- Large number of people living in extreme poverty (e.g.: under US\$1.5/day)
- Low internet penetration

Who can we help?

Countries that have:

- 3G (ideally 3G so operator has more bandwidth available)
- Wikipedia brand equity (e.g.: popular site in a given country)
- Content in the local language(s)
- Some telecom competition (the more competition, the easier it is to sell)
- Ideally, a local chapter with enthusiastic volunteers



1. Ready to Go	2. Can wait	3. Out of Scope	4. Needs support
They need, we can provide	They don't need as much but we can provide	They don't need and we can't provide	They need but there's limited content

BRAZIL



Country Stats

Population, 201 M

Population in education years, 91 M (46%)

GDP per capita, \$12,100

Population under US\$ 1.25/ day = 12.2 M

Wikipedia Stats

Country website rank, 10

Monthly page views, 454 M

Monthly page views per user, 5

Wikipedia penetration⁽¹⁾, 103%

Wikimedia chapter, Yes

Content in local language, Portuguese

> 800K articles

Mobile stats

Mobile lines, 244 M

Internet Penetration, 46%

3G, Yes

Internet Ready Handsets, 90%

Top mobile browser,

Android 31%

Opera 30%

Top devices:

Samsung, 28%

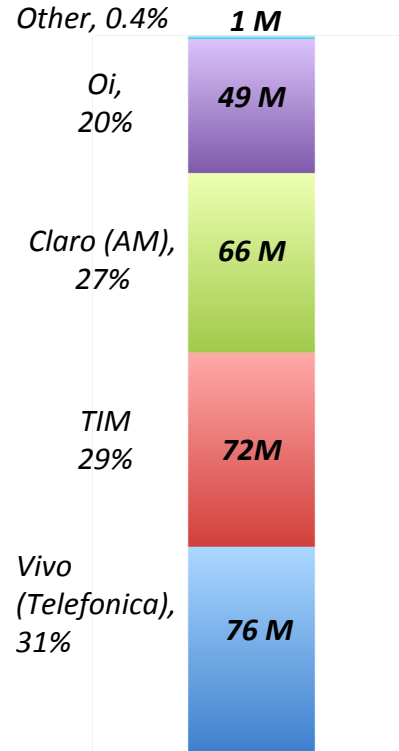
Nokia, 27%

Apple, 11%

(1) Among internet users

Mobile Market Share

TOTAL SUBS: 265 M



SWOT

Strengths

- Large number of internet ready handsets
- Healthy competitive environment
- Strong awareness of Wikipedia

Weaknesses

- Large number of subs under America Movil and Telefonica

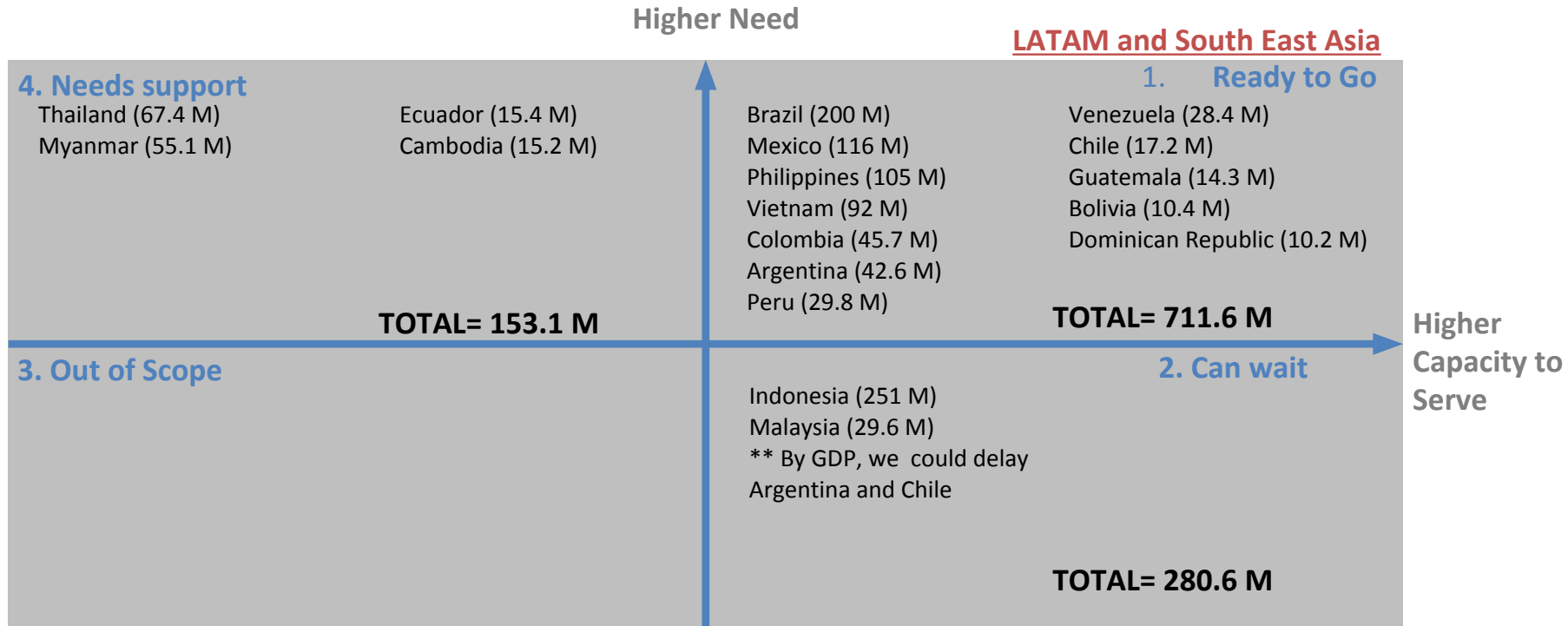
Opportunities

- Qualcomm working on similar initiative
- Leverage Opera's user base (over 60 M)

Threats

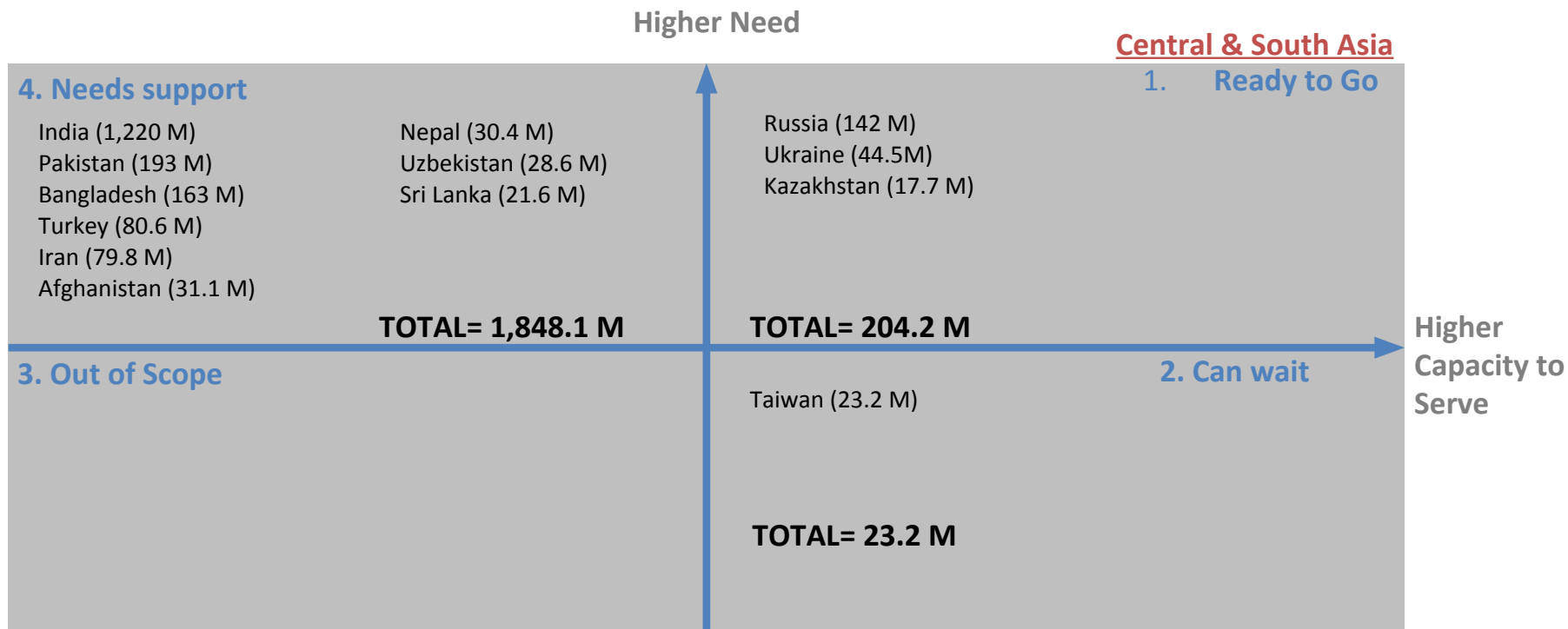
- TIM might sell its operations in Brazil

Following these guidelines, and focusing ONLY on countries with ≥ 10 M populations, we can classify our targets as:



Most Asian countries have content issues, except Philippines and Vietnam. Latin America as a whole is a great match.

Following previous guidelines, and focusing ONLY on countries with ≥ 10 M populations, we can classify our targets as:



Most of the countries in Asia have content issues, even the ones who have English as official language, have very small populations that speak it



Wikipedia Zero for Africa & Middle East

Where are we now?



897M

Total Mobile subs.

- 70 countries, 246 mobile operators
- 897M mobile subscribers in 1.25B population
- 90% still on 2G networks; basic phones

- Wikipedia Zero:
 - Launched in 12 countries, 14 operators
 - Reach 102M mobile subscribers
 - 24M free Wikipedia PVs
 - MTN SA and Safaricom KE just launched

How do we move forward?

Focusing on top 5 groups in countries with 10M+ literate population

Mobile Subscribers	MTN	Vodafone	Airtel	Zain	Orange	Total
Egypt		44M			38M	81M
Nigeria	48M		22M			70M
South Africa	25M	34M				59M
Sudan	8M			20M		28M
Ghana	12M	5M	3M			21M
Ethiopia	21M					21M
Tanzania		13M	7M			19M
Iraq				16M		16M
Congo, DR		7M	6M		3M	15M
Cameroon	7M				6M	13M
Morocco					13M	13M
Uganda	8M		4M		M	12M
Cote d'Ivoire	7M				4M	12M
Zambia	4M		5M			9M
Madagascar			3M		5M	9M
Saudi Arabia				8M		8M
Kenya			5M		3M	8M
Syria	7M					7M
Malawi			4M			4M
Mozambique		4M				4M
Total	147M	106M	60M	44M	35M	391M

How can we compare the countries?

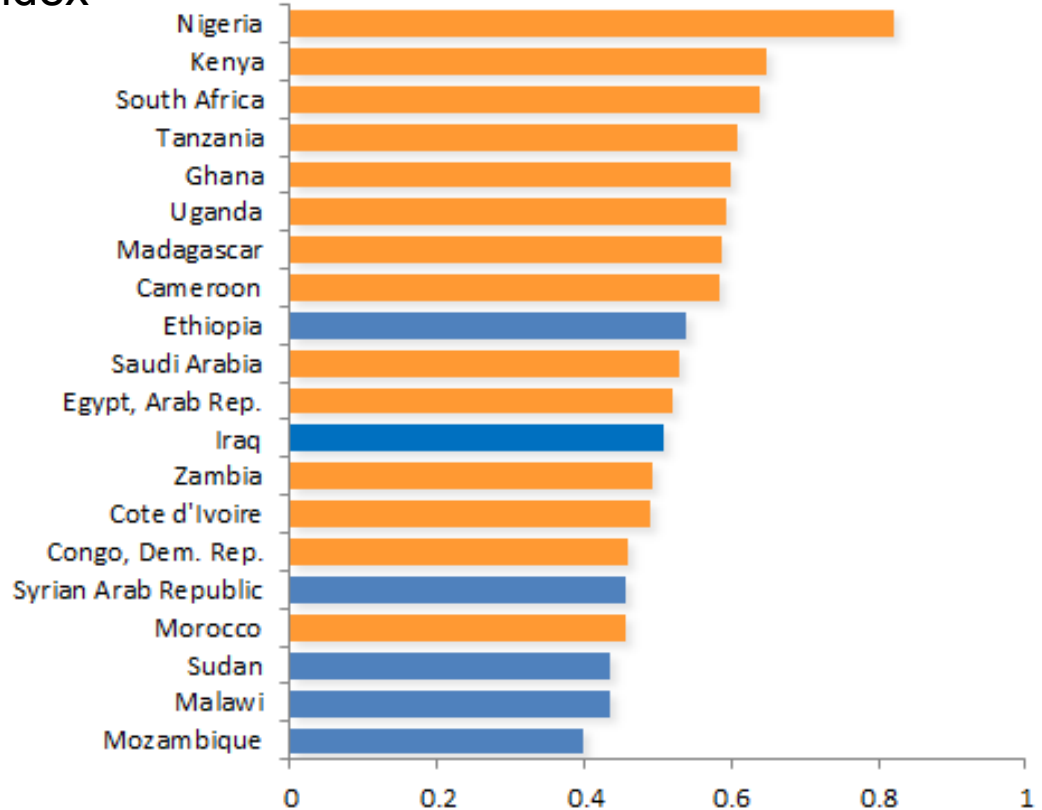
Priority Index

Criteria:

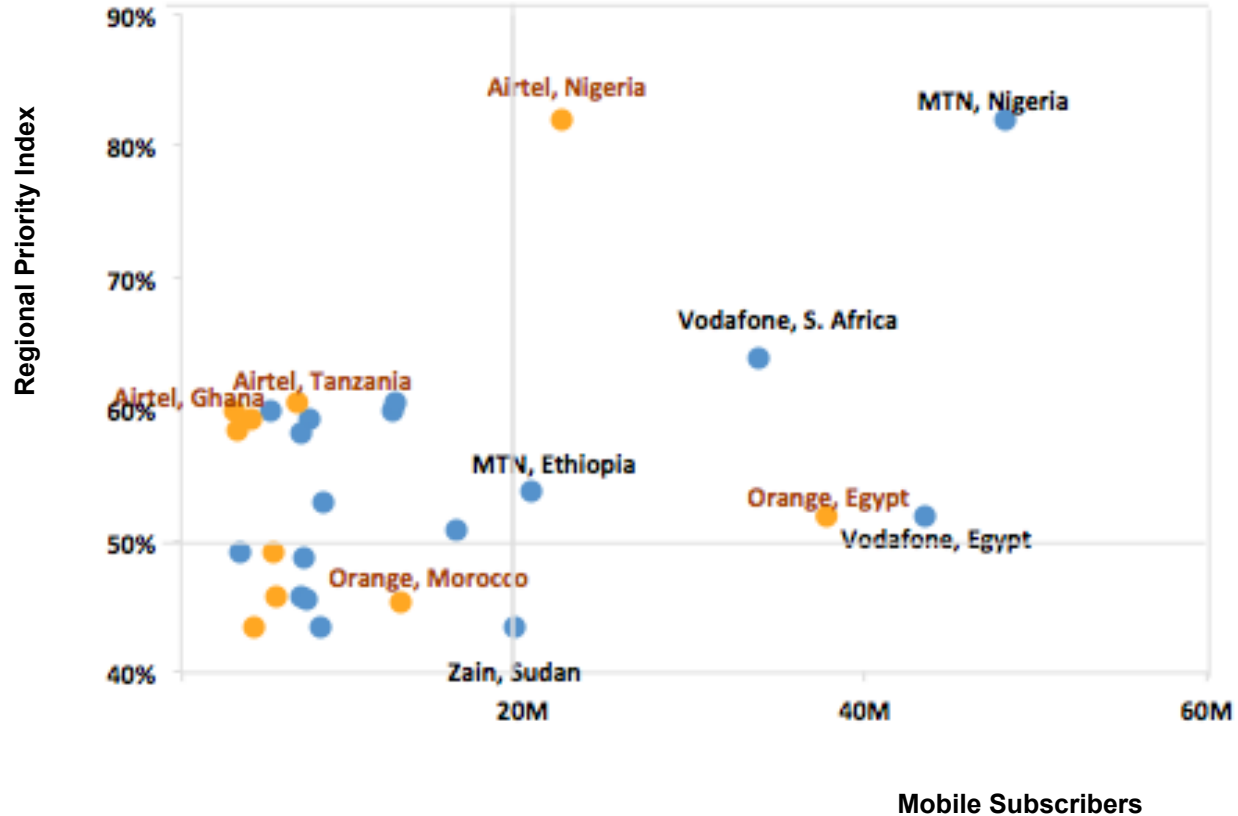
- 1) Population
- 2) Mobile penetration
- 3) Internet penetration
- 4) Income (GDP per capita)
- 5) Literacy rate
- 6) Wikipedia Monthly views per user
- 7) Wikipedia brand awareness (Alexa)

Methodology:

Each country on is assessed for each criterion relative to other regions with the final score being the average of the individual ranks. Index can range from 0 to 1 with 1 being the perfect score.



Operator Mapping



PRODUCT & TECH

Scope

- Zero-rating infrastructure
- Portal
- Wikipedia Text
- Emerging markets requirements

Product Dev Q4 Priorities

- Reduce page weight
- Portal MVP
- App preloads
- SMS pilot 2

Product Roadmap

Q1-Q2

- Stability
- https
- SMS pilot 1
- J2ME app

Q3

- Page weight
- IP migration
- SMS pilot 1
- Portal begins
- Apps zero aware

Q4

- Page weight
- IP migration
- SMS pilot 2
- Portal MVP
- Apps preload
- Analytics - basics

2014/15

- UX improvements
- Scale SMS
- Portal - scale zero
- App preloads
- Analytics - insights

Dependencies on Ops, Analytics, Mobile Web & App, UI (contractor) and Praekelt

Scaling Wikipedia Zero

- Goal: support 200+ partners with small team
- Automate!

Wikipedia Zero Portal

- Two different parts
 - External facing
 - Internal Wikimedia site

External facing website

- Provide a way for more self-service
 - Wikipedia Zero overview
 - Click-through contracts (small partners)
 - Configure technical settings
 - Partner-controlled testing
 - Marketing resources

Internal facing site

- Manage partner pipeline and maintenance
 - CRM-based system
 - Repository for documents, communications, history
 - Workflows built to support partner management
 - Receives notifications from external portal activity

Portal MVP

- Pre-launch partner features
 - Sign in and conduct testing
 - Access program information
- Launched partner features
 - Sign in and review Zero analytics
 - Sign in and review config settings
- Iterative development
- MVP approx. 2-3 months out

Portal Roadmap

Q3

Q4

Q1

Q2

MVP work begins

Design work
begins

CRM design starts

MVP released to
partners

CRM released
internally

Large feature set
available external

Portal and CRM
data integrated

Full partner set-up
and test available

Asks

- Ops
 - Portal architecture
 - ESI
- Analytics
- Search engine capacity
- Scrummaster support (ASG)
- Contractors
 - Portal UI and front end dev
 - CRM consultant and hosting

Other Priorities

- Hiring: PM Asia, Comms mgr (CCO)
- Better communicate activities
- Marketing templates
- Case studies
- Analytics
- Net neutrality

THANK YOU!