



China Mobile Payment Industry Report, 2012-2014

Mar. 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

Among the current mobile payment means, remote payment is widely used in China, while less than 6% of payments are realized through NFC (Near Field Communication) payment mode. Now, mobile payment transfers from PC Internet business to intelligent terminals, and most are still online or online-based businesses.

On December 14, 2012, the People's Bank of China released the technical standards for mobile payment in the financial industry. 13.56MHz technical standards have been identified as mainstream mobile payment standards. In practice, NFC mobile phones are not popular yet, so it is costly to promote mobile payment by customized terminals; then, several options have arisen in China, in which Sim card solution has become a mainstream. China UnionPay and China Mobile choose Sim cards as NFC carriers; China Telecom applies low-cost SIMPASS program; China Unicom adopts NFC phone program. In the future, the penetration of NFC phones will be significantly improved, and mobile payment will be realized by customized terminals eventually.

In addition, China Telecom, China Unicom and China Mobile have set up their own payment service subsidiaries, namely Tianyi E-commerce Co., Ltd., Wo Network Technology Co., Ltd. and China Mobile E-commerce Co., Ltd.. In the third round of the issuance of the third-party payment licenses, these subsidiaries all have obtained such licenses. The

third-party licenses allow China Telecom and China Unicom to conduct the services involved with mobile phone payment, fixed telephone payment and bank card acquiring; China Mobile is permitted to provide services in mobile phone payment and bank card acquiring with its license. In addition to the three major operators, by the end of 2012, a total of 197 non-financial institutions had been granted with payment licenses, of which 32 ones had got mobile payment licenses. In the future, mobile payment participants mainly include commercial banks and 32 mobile payment license holders.

The priority of China UnionPay is to transform payment environments at present. By the end of October, 2012, China UnionPay had completed transforming 1.05 million sets of POS machine. Other commercial banks support about 1 million sets of non-connected POS machine, and the future POS transformation market will be subject to the current market pattern.

This report mainly includes 4 chapters and 74 charts, involving background, status quo and competition pattern of Chinese mobile payment market, development trends of China mobile payment industry, as well as operation and development trends of 20 key companies.

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