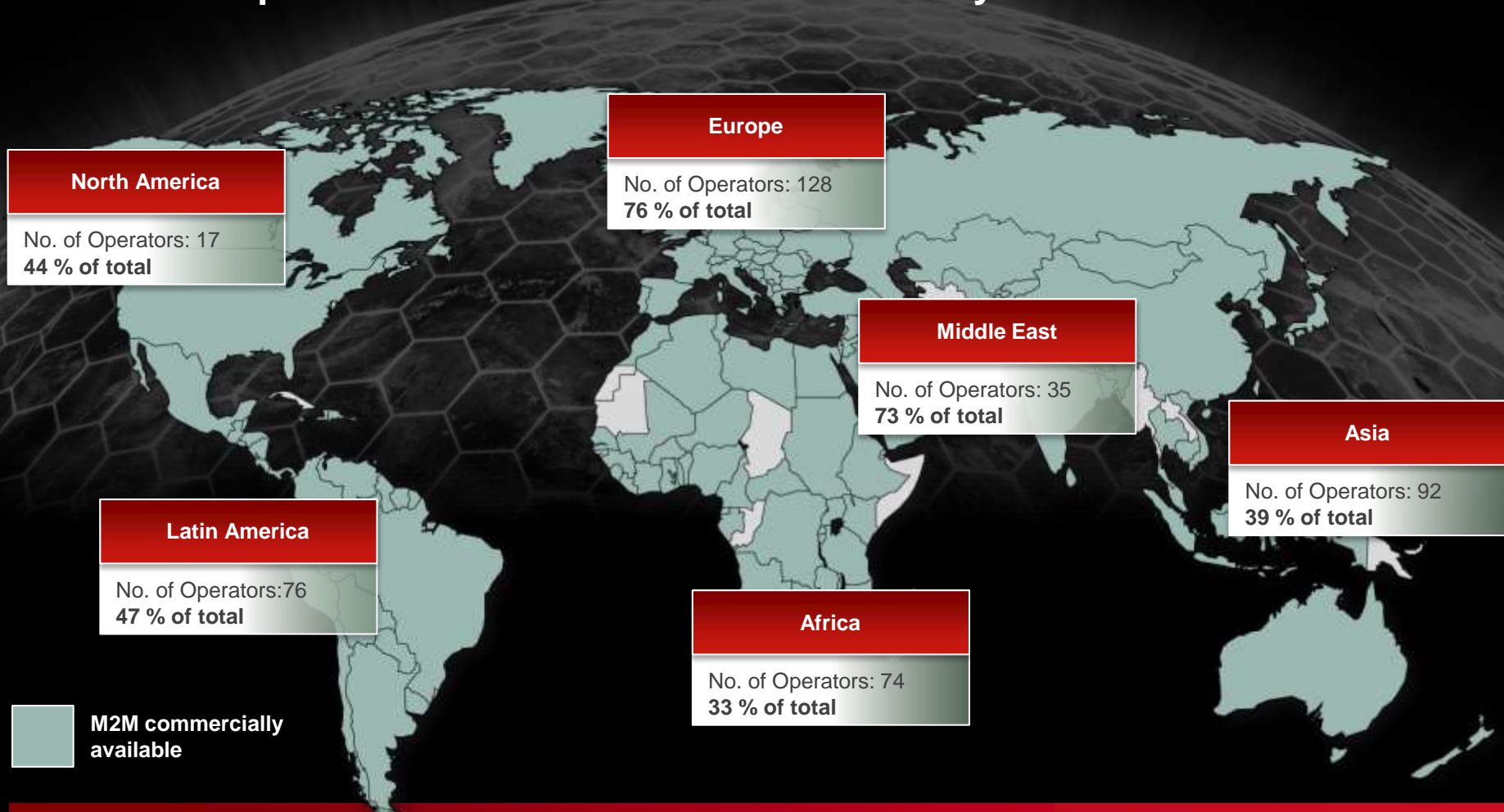# Connected Living World Overview
Global Activity

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Nearly 50% of all operators offer some kind of M2M services or tariffs

422 Operators across 176 countries currently offer M2M services

North America
No. of Operators: 17
44 % of total

Europe
No. of Operators: 128
76 % of total

Middle East
No. of Operators: 35
73 % of total

Asia
No. of Operators: 92
39 % of total

Latin America
No. of Operators:76
47 % of total

Africa
No. of Operators: 74
33 % of total

M2M commercially available

* Oceania and Turkey included in Asia

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Source: GSMA Intelligence

© GSM Association 2013

Examples of operator reported M2M connections

Deutsche Telekom, Germany
2.2m, 6% of Base

China Mobile
19.9m, 3% of Base

AT&T Mobility, USA
14.3m, 13% of Base

Sprint, USA
3.5m, 6% of Base

Turkcell, Turkey
1.1m, 3% of Base

NTT Docomo, Japan
3m, 5% of Base

Claro, Brazil
3.2m, 5% of Base

Telstra Australia
900k, 6% of Base

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Source: GSMA Intelligence

Initial estimates show M2M connections around 150m at the end of 2012 – YoY growth of nearly 40%

GSMA.

Europe
- 2011: 32.8
- 2012: 42.0

North America
- 2011: 26.5
- 2012: 30.6

Middle East
- 2011: 1.3
- 2012: 2.2

Asia
- 2011: 37.7
- 2012: 60.5

Latin America
- 2011: 8.5
- 2012: 11.6

Africa
- 2011: 4.5
- 2012: 6.4

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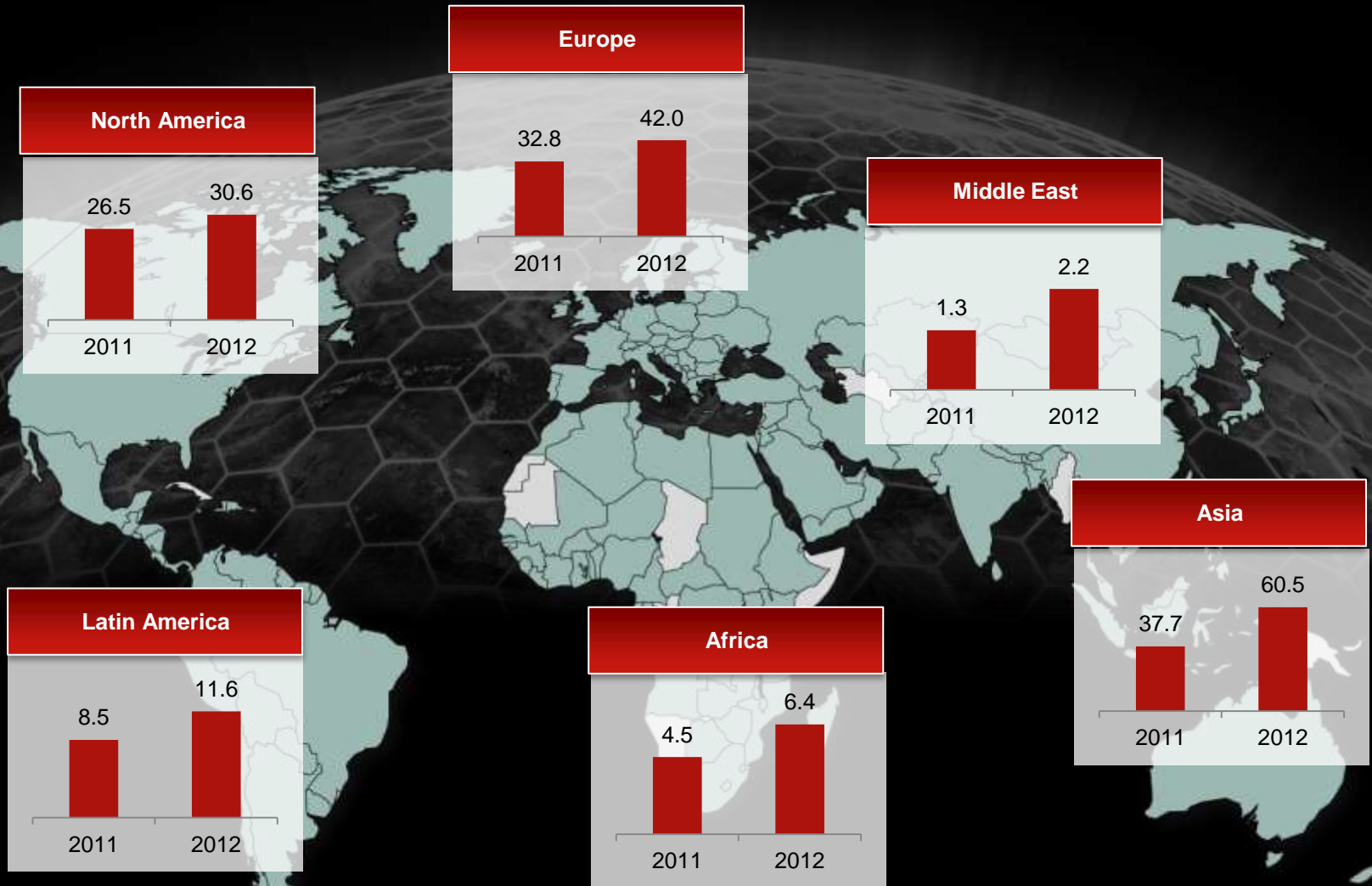
Source: GSMA Intelligence

Middle East Regional growth clearly faster than global average – only Asia showing higher growth rates

GSMA.

Iraq
35K
54% YoY Growth

Iran
587K
86% YoY Growth

Bahrain
42K
42% YoY Growth

Qatar
55K
47% YoY Growth

Kuwait
127K
47% YoY Growth

Middle East
2012 M2M = 2.2m
67% Growth

UAE
304K
65% YoY Growth

Jordan
153K
46% YoY Growth

Oman
52K
65% YoY Growth

Lebanon
92K
39% YoY Growth

Saudi Arabia
686K
72% YoY Growth

Rest of Middle East
69K
62% YoY Growth
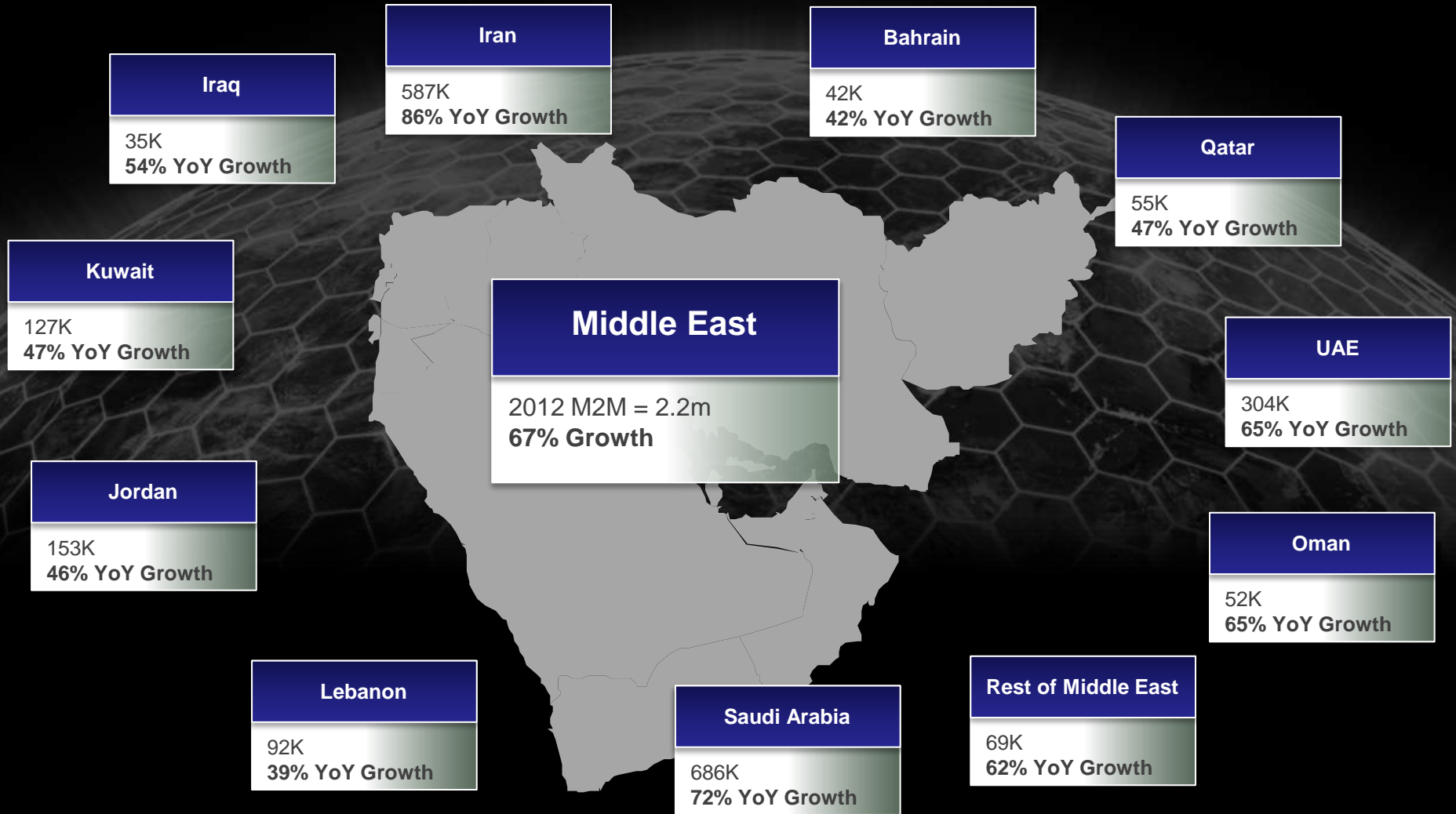
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Source: GSMA Intelligence

Network Operators already creating solutions that impact lives across the world

eCall

BMW: Well Connected in China

AT&T Digital Life

Mobile World Capital

Etisalat: making learning innovative and relevant

KT Taxicall

Vitality GlowCap

Envision Charlotte, North Carolina

Remote Monitoring in Sri Lanka
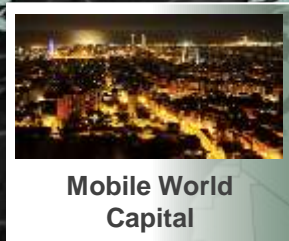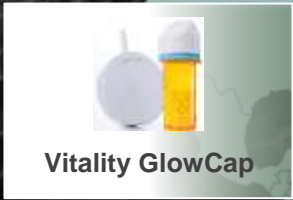
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AT&T Digital Life

AT&T digital*life*™
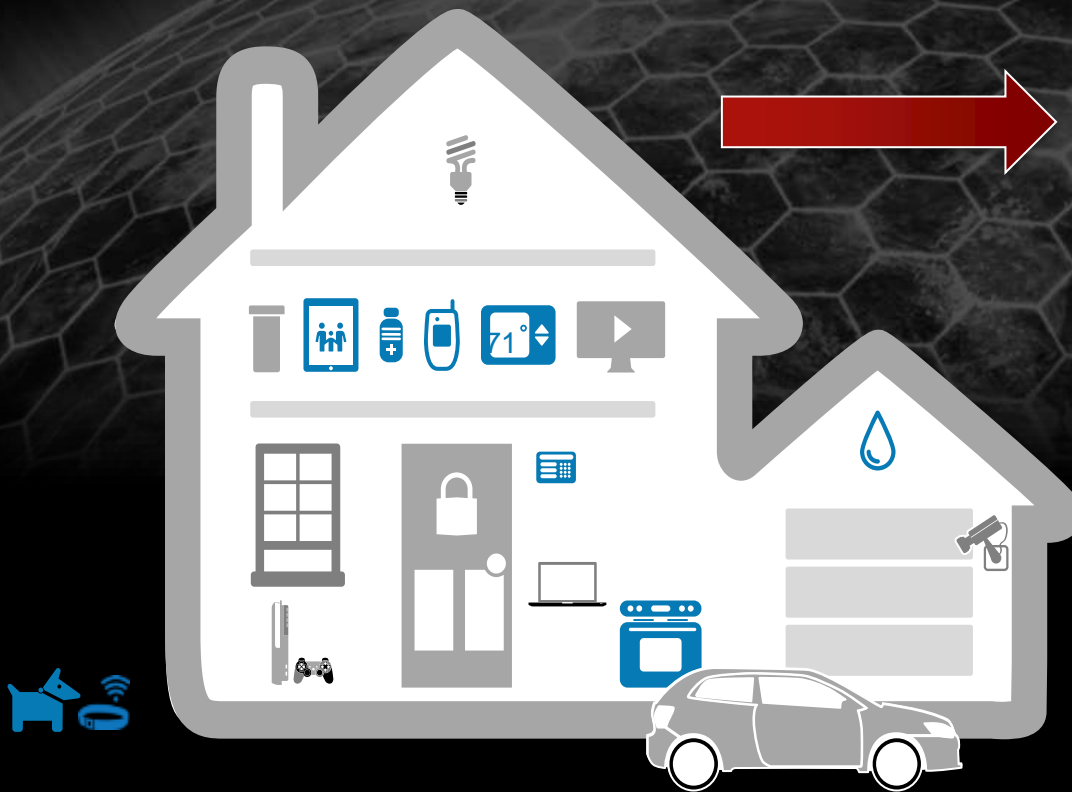
- It's a fully integrated **SMART** security and automation service

- It's a **SIMPLE** experience, making it easy for customers to learn, build, buy and manage their service

- It's a **SECURE** solution offering a 24/7 wireless connection to an AT&T owned and operated monitoring center

- It's planned to be a national **SOLUTION** across AT&T's wireless footprint

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Moving up the value chain delivers higher revenues

Example: KT Taxicall Service

Before	After
Contract = 2 years **Network service ARPU** = $4.5	**Contract** = 5 to 7 years **Network service ARPU** = $7 **Call centre managed service** = $50/month
3G Network Mobile Device	Call Centre Solution/Application Platform 3G Network Mobile Device

Accelerating growth and operational efficiency in the M2M world

And some of the less well known examples

Connected Cows

Prisoner Bracelets

"Moose Track"

Connected Walking Stick

Talking Trees

Connected Bike

Vending Machine

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# Over 2,200 services tracked globally – up from 1800 in 2012

For more information visit the
Connected Living Tracker

North America
Nov 2012	253
Nov 2013	**288**

Europe
Nov 2012	699
Nov 2013	**837**

Middle East
Nov 2012	72
Nov 2013	**73**

Asia
Nov 2012	311
Nov 2013	**363**

Latin America
Nov 2012	117
Nov 2013	**130**

Africa
Nov 2012	347
Nov 2013	**363**

Oceania
Nov 2012	27
Nov 2013	**32**

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NB: Global services not included in regional totals

Regional focus on different verticals – reflected in variances in tracked services

mHealth

mEducation
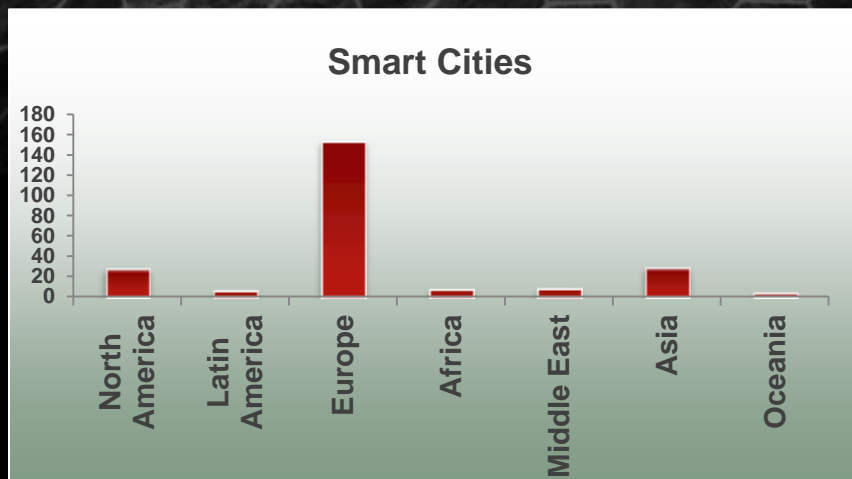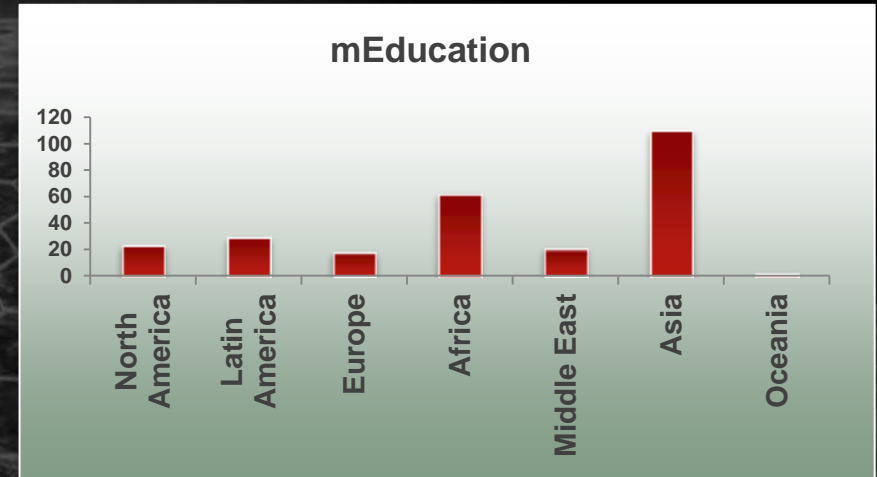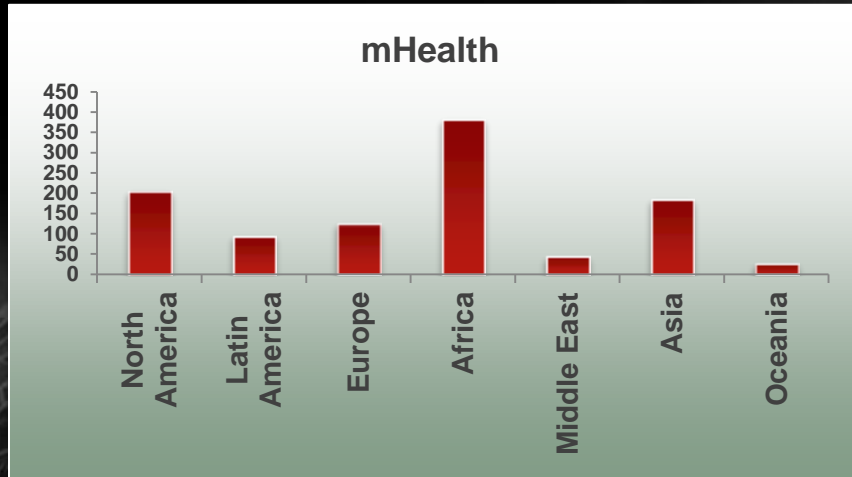
Smart Cities

- mHealth represents the largest number of services in the Connected Living Tracker – Africa being the largest region

- Asia leading the market in Education – language courses a key component

- Europe currently showing the most Smart Cities mobile deployments

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NB: Global services not included in regional totals

Connected Applications – Sound Business Models Deliver Growth

Sector	Application Examples	2020			
		Global		Middle East	
		CAGR	% of M2M	CAGR	% of M2M
Connected Car	Infotainment and Apps, Navigation, Vehicle Platform	35%	26%	34%	33%
Smart Meters	Automated meter readings	40%	16%	52%	10%
Security and Tracking	Automobile tracking, Personal tracking (children, elderly, pets etc.)	25%	14%	18%	19%
Pay as you Drive Insurance	Flexible time, usage, behaviour models in car insurance	42%	7%	25%	1%
Healthcare	Assisted Living, Worried Well Monitoring, Remote Monitoring	53%	4%	60%	4%

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Based on Machina Research data – Nov 2013

Summary – In conclusion

- Initial M2M Connections data showing rapid growth rates in all region – Middle East one of the highest across the globe
    - To discuss the M2M data in more detail, please contact:

    - David Evans (devans@gsma.com)
    - Sylwia Kechiche (skechiche@gsma.com)

- Over 2,200 mobile services included in the Connected Living Services tracker

- Intelligent M2M solutions already providing meaningful solutions in everyday lives – with clear revenue opportunities for operators

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