



mAutomotive

GSMA Connected Car Forum

Your key to connected automotive opportunities





Connected transport, just around the corner.

Over the course of just a few decades, the mobile phone has become one of the most significant innovations in history, connecting six billion people globally and transforming the way we communicate and access information, entertainment and the vast resources of the Internet.





But a new wave of connectivity is on the horizon. In the future, everyone and everything around us that might benefit from a wireless connection will have one. We will see connected cars, commercial vehicles, freight, buildings, medical monitors, televisions, game consoles and a whole range of connected consumer electronics and household appliances. Many of these will be connected intelligently, communicating and interacting with each other.

The automotive industry has the potential to play a transformative role in this connected future by delivering new services such as:



- on-demand, in-car entertainment
 - low-cost pay-as-you-drive insurance
 - location-enabled security features
 - real-time fleet management
- 



Sizing up the potential

To achieve this market potential, the automotive and mobile industries need to work closely together to deliver scalable, secure, interoperable, ubiquitous and intuitive connected experiences. This will help address key market development requirements such as remotely provisioned SIMs and interoperable architecture for in-market SIM management.

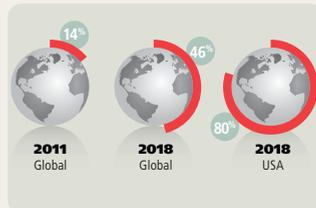
To accelerate the development and deployment of connected automotive solutions and devices, the GSMA is engaging with automakers, mobile network operators and the wider ecosystem to better understand their needs and to reduce the barriers to adoption.

The connected car opportunity

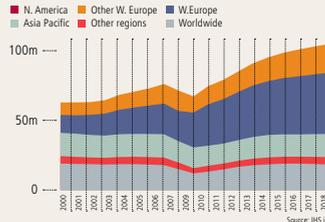
The world of connected cars is set to explode into life in the next five years. The industry is gearing up for a significant shift that will leave the landscape changed forever – whether you are a mobile network operator, automaker, software developer or hardware vendor there are huge opportunities on offer. **Leading forecasts of the industry's growth to 2018.**



Globally in 2011 only 14% of new cars sold included an embedded connectivity solution. This will grow to 46% globally by 2018, and 80% of US cars will feature one.



Asia Pacific, North America and Europe are set to continue to drive automotive growth, with car sales expected to reach 100m globally by 2018.



10m 20m 30m China expect to contribute 30m of these cars alone

Current forecasts show that the total revenue opportunity for embedded telematics solutions will grow rapidly over the next five years.



OnStar announced it was accruing more than \$1 billion in annual revenue in 2011 for General Motors.

The European revenue opportunity

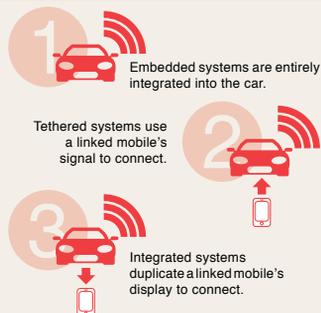
A closer look at the revenue opportunities offered by the European market across the largest telematics categories.



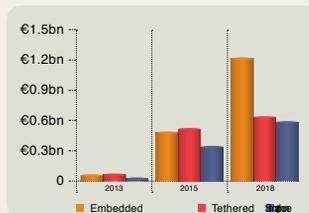
	 Safety & Security	 Vehicle	 Navigation	 Infotainment	 Insurance
2009	€28,300,000	€1,070,000	€9,730,000	€5,180,000	€15,000,000
2010	€31,700,000	€1,290,000	€50,800,000	€15,900,000	€20,000,000
2011	€38,200,000	€1,670,000	€114,000,000	€33,900,000	€29,000,000
2012	€43,700,000	€1,730,000	€194,000,000	€68,500,000	€57,200,000
2013	€63,500,000	€2,300,000	€259,000,000	€101,000,000	€89,000,000
2014	€96,800,000	€3,530,000	€373,000,000	€212,000,000	€122,000,000
2015	€143,000,000	€5,150,000	€637,000,000	€399,000,000	€157,000,000
2016	€332,000,000	€8,720,000	€1,090,000,000	€876,000,000	€198,000,000
2017	€481,000,000	€12,600,000	€1,350,000,000	€1,220,000,000	€235,000,000
2018	€617,000,000	€15,500,000	€1,530,000,000	€1,510,000,000	€275,000,000

Source: SBD

There are three ways to connect:



Hardware revenues are predicted to increase by over €2.2 billion in the next five years, with growth in embedded hardware revenues particularly impressive.



Source: SBD

GSMA Connected Car Forum

The GSMA Connected Car Forum (CCF) is where automakers and mobile operators meet to:

- Share information and enable industry cooperation
- Resolve barriers to connected car deployment
- Speed the adoption of telematics and infotainment services.

GSMA CCF members commit to laying the groundwork for connected cars becoming ubiquitous. Target figures include:

- More than 20% of global vehicle sales in 2015 to include embedded connectivity solutions
- More than 50% of global vehicles sales in 2015 to be connected (either by embedded, tethered connectivity or smart phone integration)
- Every car to be connected in multiple manners by 2025.

Source: SBD 2012

The GSMA CCF addresses cross-industry initiatives of international relevance that focus on:

- Enablers for telematics service deployment
- Current operative deployment problems
- Strategic opportunities for the deployment of new services.

Global players collaborating in one forum

Current participants in the GSMA CCF include:

Mobile network operators: AT&T, Bell Canada, China Mobile, China Telecom, China Unicom, Deutsche Telecom, KDDI, KPN, KT, NTT Docomo, Orange, Rogers, Softbank, Telecom Italia, Telefonica, Telenor, Telstra, Turkcell, Verizon Wireless and Vodafone.

Automakers: Audi, BMW, Chrysler, Fiat, Ford, GM, Honda, Hyundai, Jaguar Land Rover, Mazda, Nissan, Peugeot, Renault, Toyota, Volvo and VW.

The GSMA CCF is held in London five times throughout the year, participation is by invitation and in person or via teleconference.

Additional regional meetings are held in key markets, often in conjunction with major industry events.



How can you get involved?



The forum is open to automotive manufacturers and mobile operators.

Target participants include:

Automotive: a mixture of product planning executives plus telematics, innovation and technical experts

Mobile operators: business development executives, embedded mobile specialists and technical experts.

Members of the broader automotive ecosystem are invited to join the mAutomotive workstream.



To join, email mautomotive@gsma.com

To find out more visit:

www.gsma.com/connectedliving/mautomotive

www.gsma.com



Connected Living

The Connected Living programme is a market development initiative whose mission is to help mobile operators accelerate the delivery of new connected devices and services. Our target is to assist in the creation of 700 million new mobile connections, whilst stimulating a number of service trials and launches in the Automotive, Education and Healthcare sectors. We also have a special focus on Smart Cities to support Barcelona becoming the Mobile World Capital.

To join the programme and to find out how you can be involved, please email and visit the website.

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