



mAutomotive



mAutomotive: Latin American Telematics Roundtable

Francesca Forestieri, Director mAutomotive

Contents



- Why mAutomotive?
- What is GSMA doing in mAutomotive?
- Our Panel Today

Why is Automotive Important to Operators?



1. Predicted Growth in Telematics & Infotainment

Figure 1-2: Global revenue from automotive M2M 2010-20 [Source: Machina Research, 2011]

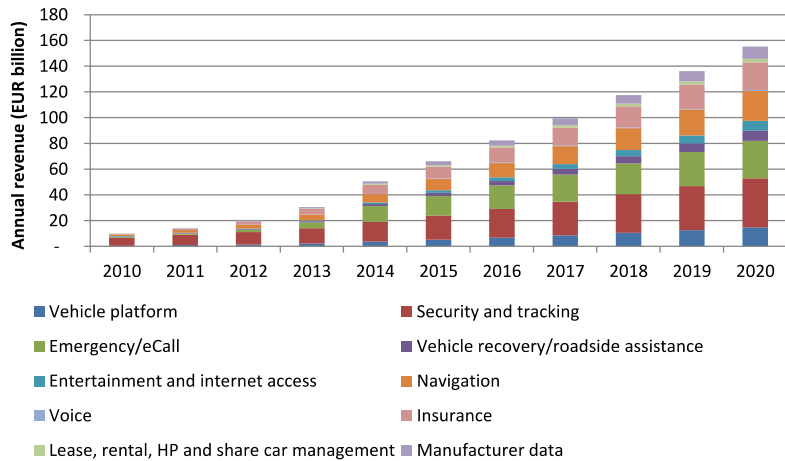
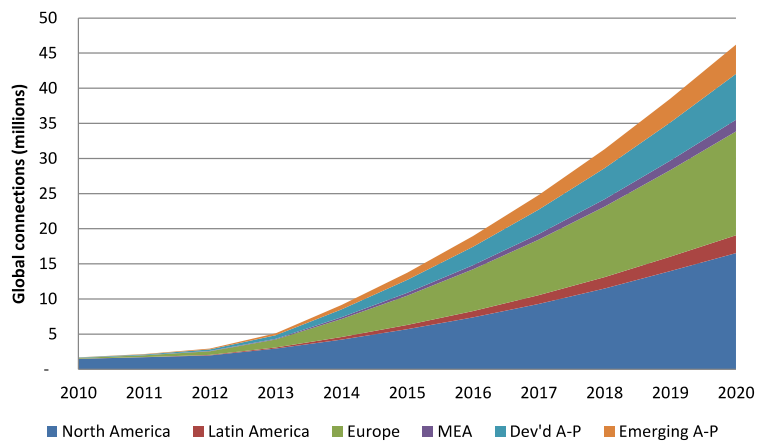
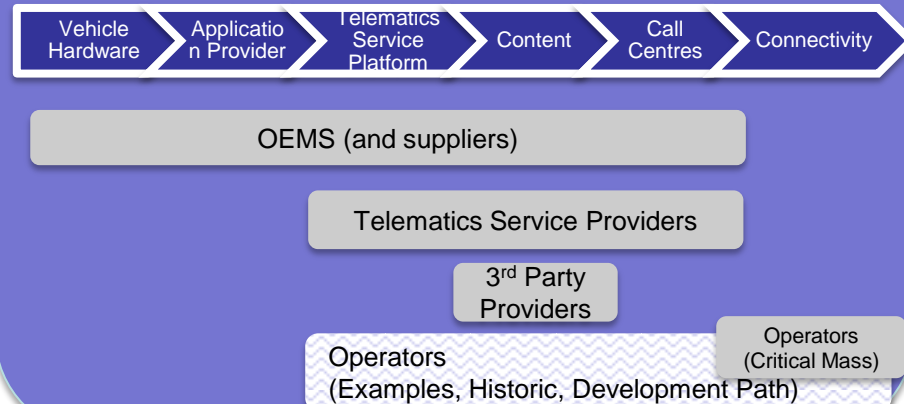


Figure 6-7: Global M2M entertainment and internet access connections 2010-2020 [Source: Machina Research, 2011]



© GSMA – Excludes those users accessing the application through the vehicle platform.

2. Important Opportunity for Operators in Value Chain



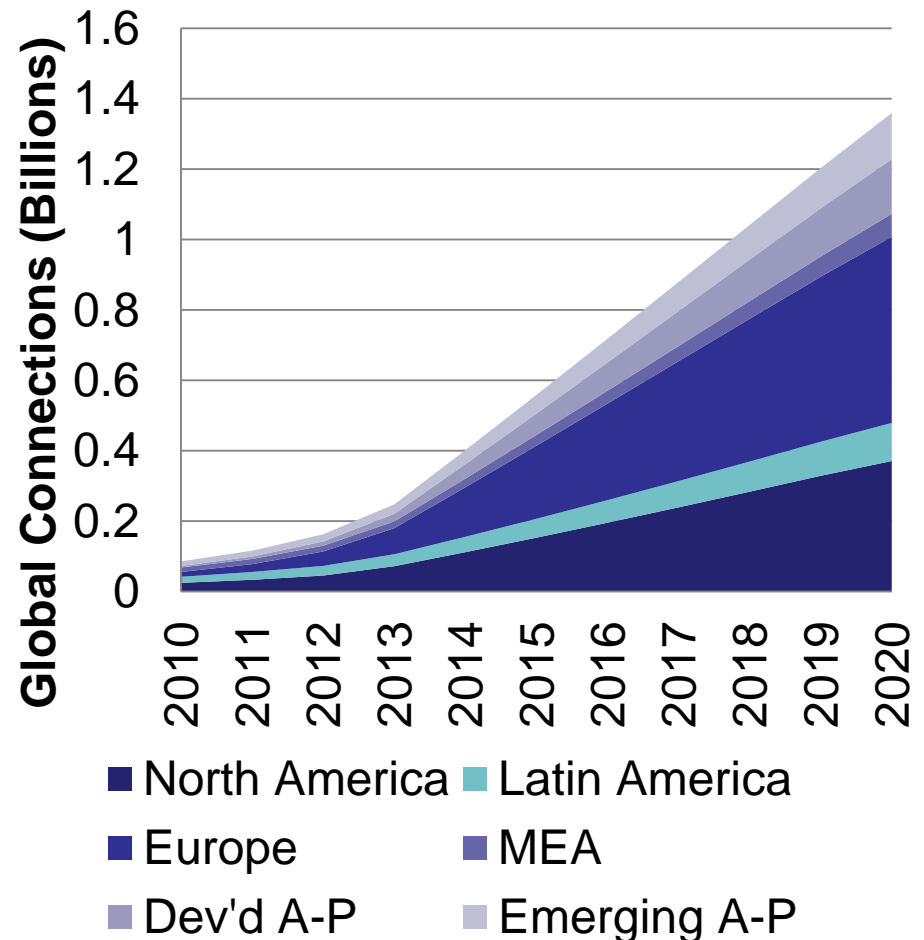
3. Why cross-industry collaboration is necessary?

- Existing fragmentation in requests for service support
- Necessity to develop interoperable, regional/global solutions
- Importance of connectivity related-issues (including security and privacy) are growing
- Evolving market demands, as more data intensive services are expected to be deployed on massive scales requiring new technologies, business models and cooperation

Growth: Global Automotive M2M Connections

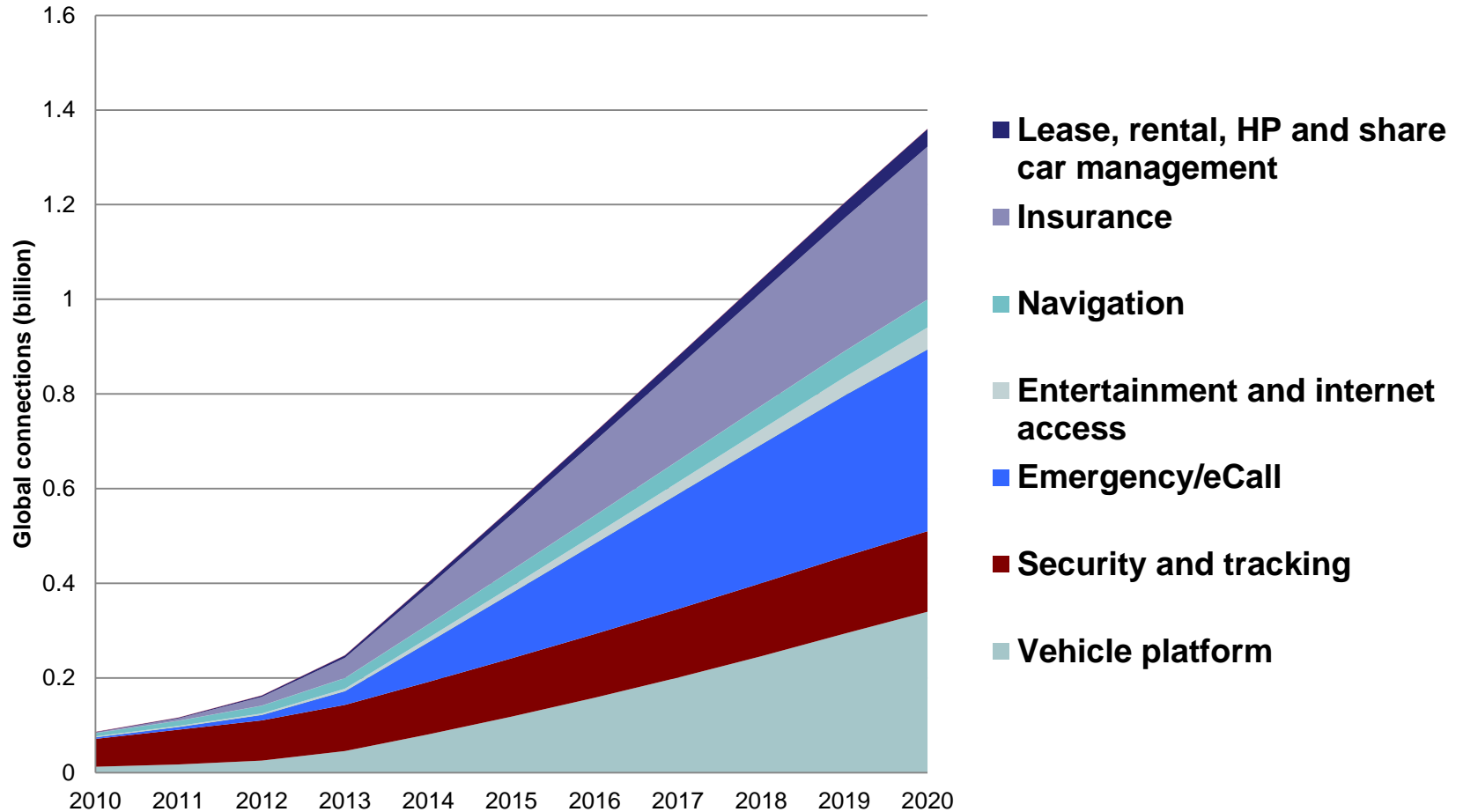


- 2010: less than 90 million connections globally
- In 2020: growth to almost 1.4 billion connections
 - **1 billion will be application-specific ‘aftermarket’ devices**
 - **+300 million will be vehicle platforms supporting multiple applications.**



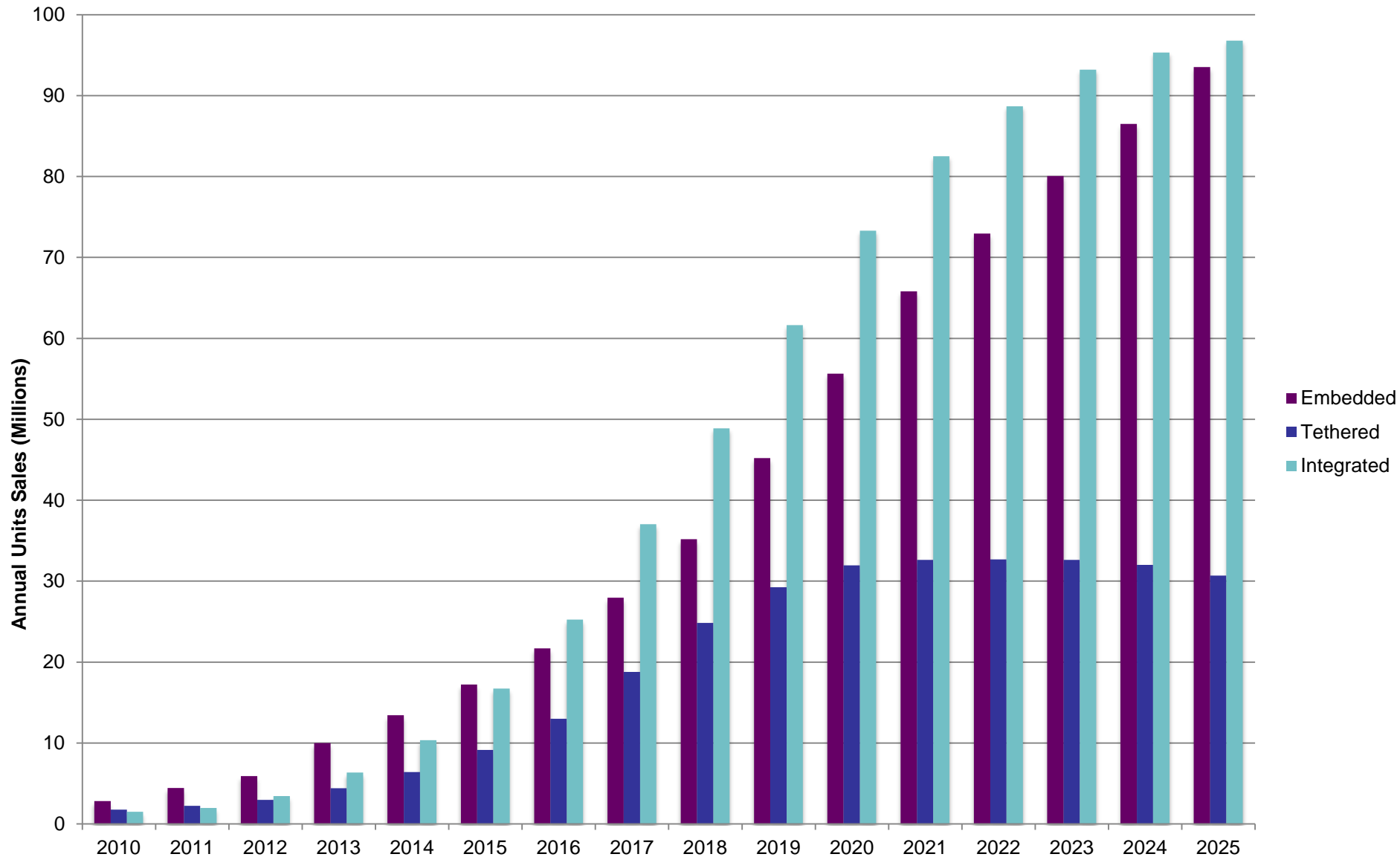
[Source: Machina Research, 2011]

Growth: Automotive Connections by Applications



[Source: Machina Research, 2011]

Growth of Connectivity in Cars: 2010-2025



Unique Moment for Connected Vehicles...



General Drivers

- **Using Any device**
- Services covering **all consumer needs and environments**
- **Interaction throughout the Day**
- **Constant**

Evolution in consumer demand: Flexibility and SERVICES

Technology Drivers

- **Cloud based services**
- **HTML5** – changing the services offered in the car
- Shift from solely proprietary to **mixed solutions** (native OS and Html)
- **High bandwidth cellular network deployment**

Connected Vehicle Drivers

- **Brazil**
- **Europe**
- **Russia**

Regulatory Measures Resulting in Mandatory Fitment of Embedded Solutions in Vehicles

New Business Models

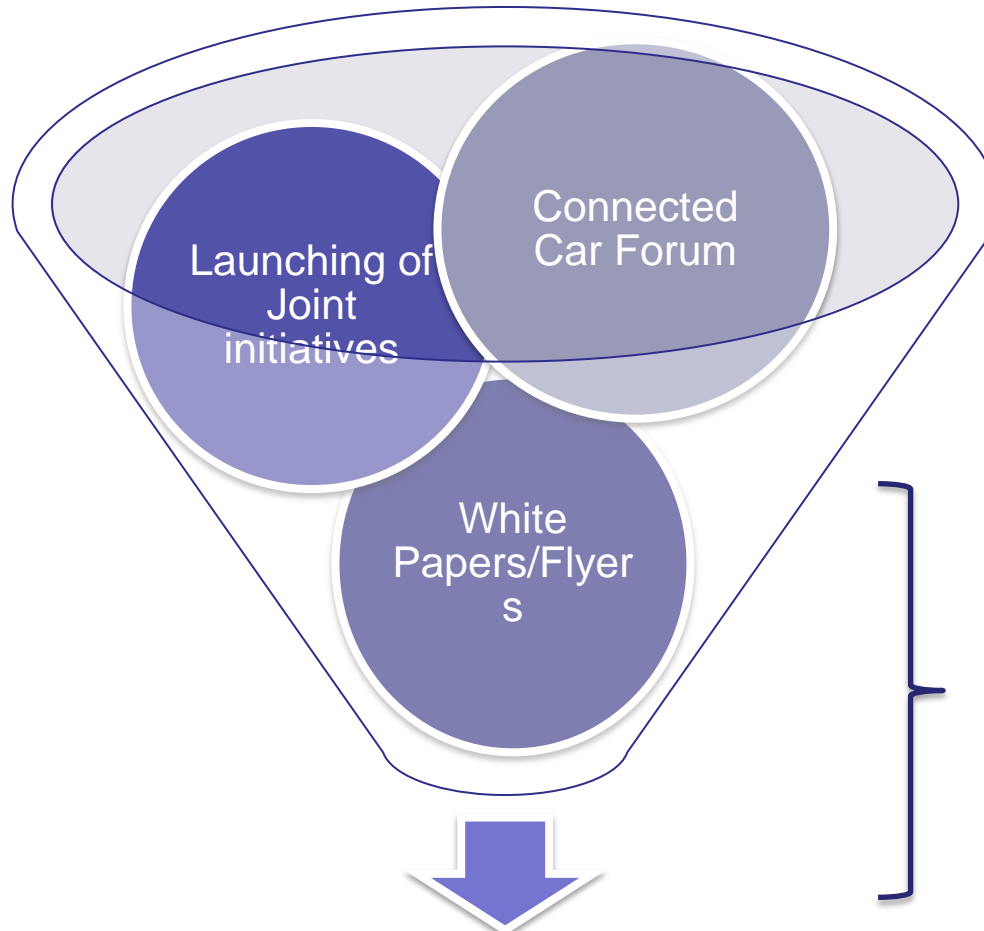
- **Services**
- **Connectivity**

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Launching mAutomotive Workstream (2011)



- *Connecting Cars: The **Technology Roadmap***
(<http://www.gsma.com/documents/gsma-connecting-cars-the-technology-roadmap/22668>)
- *2025 Every Car Connected: **Forecasting the Growth and Opportunity***
(<http://www.gsma.com/documents/gsma-2025-every-car-connected-forecasting-the-growth-and-opportunity/22670>)
- *Connected Cars: **Business Model Innovation*** (<http://www.gsma.com/connectedliving/wp-content/uploads/2012/05/GSMA-Connected-Cars-Business-Model-Innovation1.pdf>)

- **Increase collaboration across ecosystem actors**
- Bring forward areas of **collective** action that can **reduce fragmentation**
- **Promote** use of GSM family technologies for services to the automotive industry

GSMA mAutomotive: Connected Car Forum



Automakers:

- Audi, BMW, Fiat, Ford, GM, Honda, Hyundai, Jaguar Land Rover, Nissan, Peugeot, Renault, Subaru, Toyota, Volvo, VW;



Operators:

- AT&T, Bell Canada, China Mobile, China Telecom, China Unicom, Deutsche Telecom, KPN, KT, NTT Docomo, Orange, Rogers, Softbank, Telecom Italia, Telefonica, Telenor, Telstra, Teliasonora, Turkcell, Verizon Wireless, Vodafone;

Past Events:

Global Connected Car Forums:

- London: 06/11, 09/11; 11/11; 02/12

Past Regional Events include:

- North America 06/12
- China 12/11
- Japan 09/11

GSMA mAutomotive: Realising Enablers & Growing Opportunities



Priority Themes 2012	Activities				
	Workshops to Id. Barriers & Opportunities	Requirements & Use Cases	Specification s/Guidelines	White Paper	Trial / Proof of Concept
Remote Management of SIM: Proof of Concept					X
Service Awareness & Roaming: Requirements for Telematics & Infotainment Services		X			
Charging & Billing: Split, Service Based Charging for Telematics and Infotainment		X			X
Tethering: Tethering White Paper; Interoperability Requirements for PAN/DUN	X	X	X	X	
High Bandwidth Enabled Services: Looking Towards the Future	X				?
eCall: Beyond pan-European eCall	X		X		X

GSMA Workshop on mAutomotive Results & Activities – 28th



10:00 Forecasted Growth and Opportunities for Connected Car Services

10:30 Connectivity Options for Connected Car Services: Use Cases, Motivations, SWOT Analysis

GSMA Automotive Activities 2012/2013

11:00 Proof of Concept: Remote Management of Operator Credentials in Automotive

Trials: Charging & Payment

11:30 Connecting Cars: Innovating Business Models

12:00 Operator Opportunities & Lessons Learned

12:30-13:30 Networking lunch

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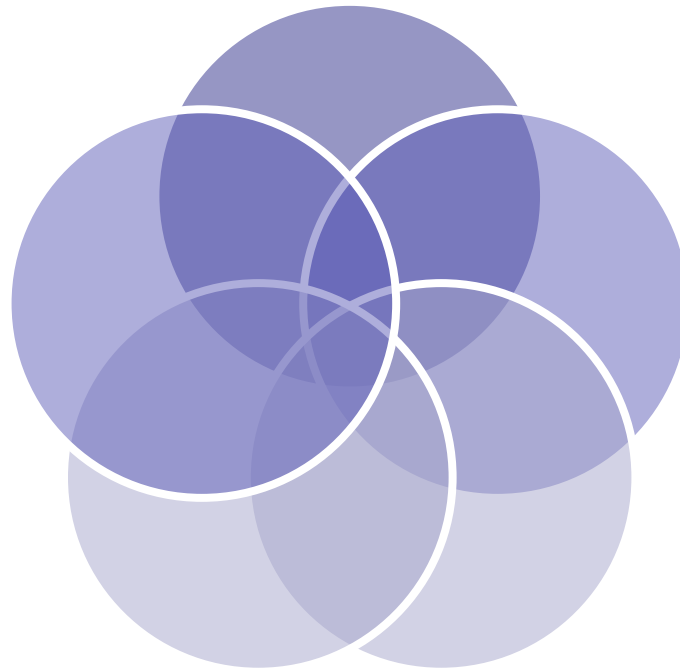
Unique Moment for Brazil & LATAM: Workshop Themes & Speakers



**SIMRAV- Brazilian
Regulatory
Context: Denatran,
Gristec**

**Operator
Opportunities in
Connected
Vehicles: Telenor**

**Telematics
Evolution in
LATAM: Volvo,
Magnetti Marelli,
Fujitsu Ten**



**Fleet
Management
Solutions:
Autotrak**

**Location and
Traffic
Management
Services in
Brazil: Nokia**



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Thank you!

www.gsma.com

fforestieri@gsm.org