

Creating confidence for successful IoT deployments leveraging 5G

Carsten Ahrens, CEO G+D Mobile Security

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“IoT – the biggest machine mankind has ever built...

...and we better make it secure!”



- 1 Mio. added devices per hour in 2023 (Gartner)
- 10^{18} IoT devices connected in 2035 (arm)

What is needed to unleash the full growth potential of IoT?

Key ingredients to unlock its massive potential

IoT comprises the following main processes:

1. Deploy and connect “things”
2. Acquire and transmit contextual information from “things”
3. Analyze, process and provide data-driven services
4. Send control messages, updates and data to “things”



Pre-requisites to massive IoT adoption:

1. Scalable, hands-free deployments
2. Trusted data, security and privacy
3. Standardization of key protocols
4. Global, reliable connectivity
5. Device security & remote management and recovery
6. IoT applications incl. hardware

All fully trusted, with minimal latency, global reach and at massive scale

BRUCE SCHNEIER

BEST-SELLING AUTHOR OF *DATA AND GOLIATH*

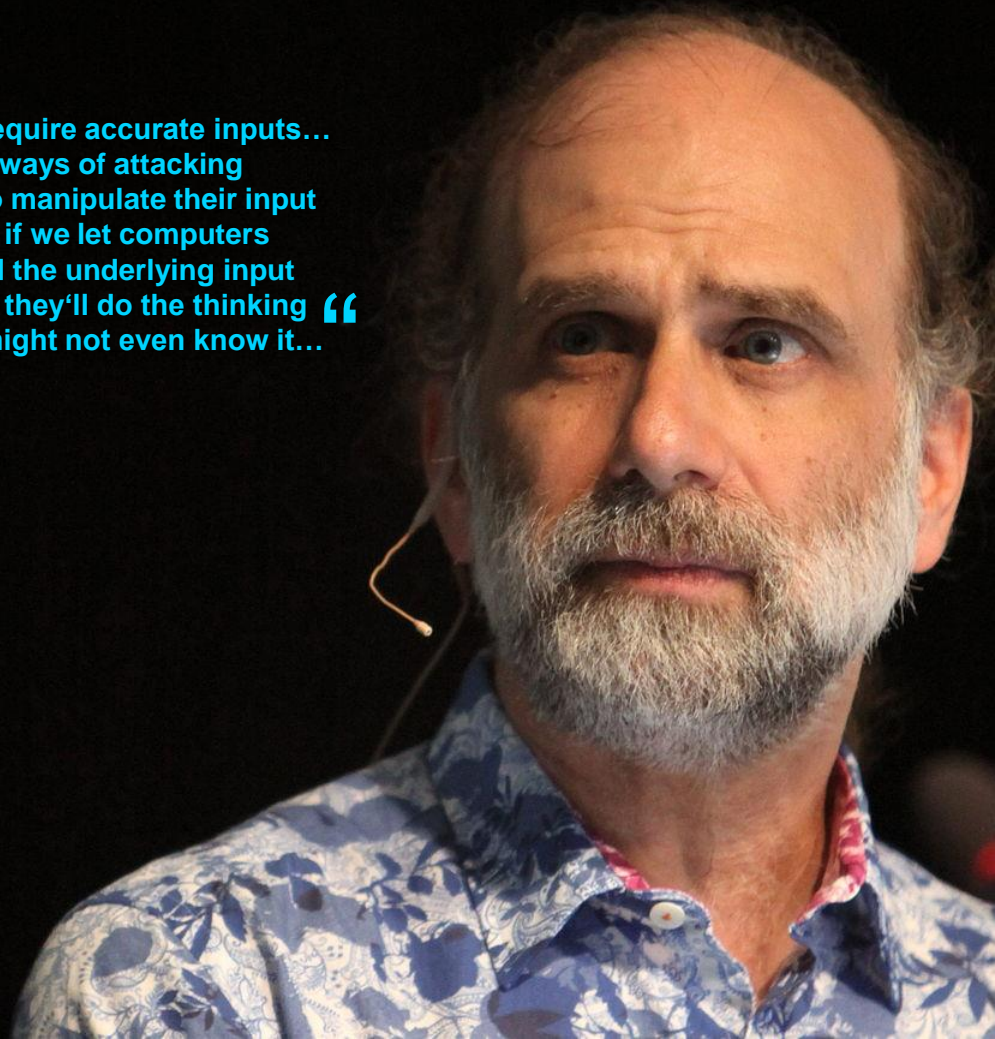


CLICK HERE TO KILL EVERYBODY

Security and Survival in
a Hyper-connected World



“...Algorithms require accurate inputs...
And one of the ways of attacking
algorithms is to manipulate their input
data. Basically, if we let computers
think for us and the underlying input
data is corrupt, they'll do the thinking “
badly and we might not even know it...”



Giesecke+Devrient
Creating Confidence

The IoT market in numbers

The value is coming from insights generated from trusted data

\$906
billion

IoT revenue in 2025 will reach 906 billion – up from 348 billion in 2019. Due to Covid-19 and cost reduction pressures we have reduced or forecast from 1.1 trillion.

95.41	- 0.02	Avg Vol	Vol
08.15	- 0.08		EPS
95.02	+ 0.23		Beta
04.02	- 2.22		
65.98	+ 5.00		

67%

Application, platforms and services share of total IoT revenue – IoT's value lies in the data generated. Applications and services using the insights generated from this data will enable end users to reap to reap additional benefits of streamlined operations and cost savings.

10%

The market will grow at 10% in 2020 – this reflects the economic crisis and weaker demand. Vendors are extending trial periods and accommodating enterprises' need for cost savings.

00.59	- 0.08		
03.05	+ 2.00		

5%

Connectivity as a share of overall opportunity by 2025 – for operators, connectivity still accounts for the bulk of IoT revenue. Leading telcos are upping their effort to capture value beyond connectivity.

38%

Asia Pacific share of IoT revenue in 2020 – this will further increase to 38% by 2025 as government stimulus plans help digital transformation efforts across the region.

91.45	+ 0.11		
32.17	+ 1.09		


-3%

Decrease in professional services revenue in 2020 – consulting will take the biggest hit from Covid-19. As economic growth returns, we expect revenue growth from professional services to improve to pre-Covid-19 levels.


Source: GSMA Intelligence: IoT revenue: state of the market 2020, August 2020

Securing the IoT landscape – it's heavy lifting!


Mobile Network Operators




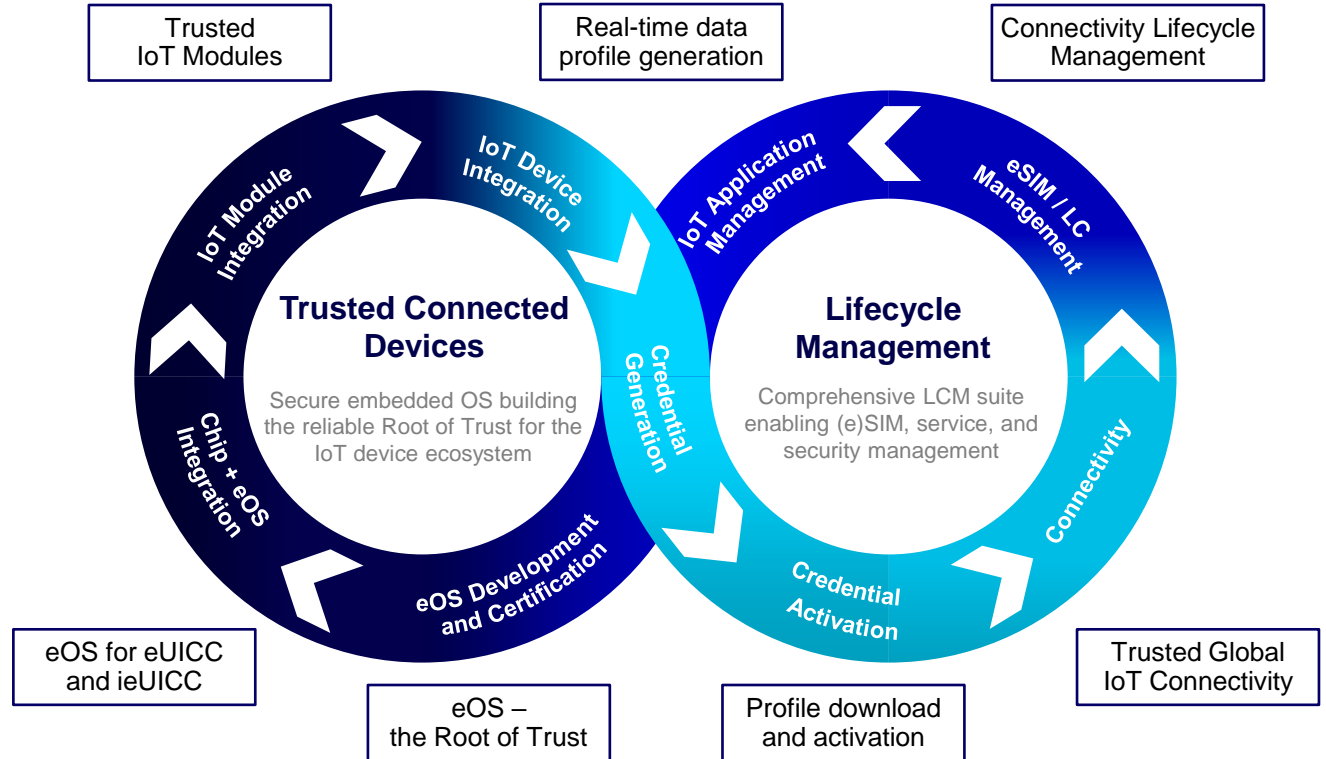
Tech Companies



Automotive



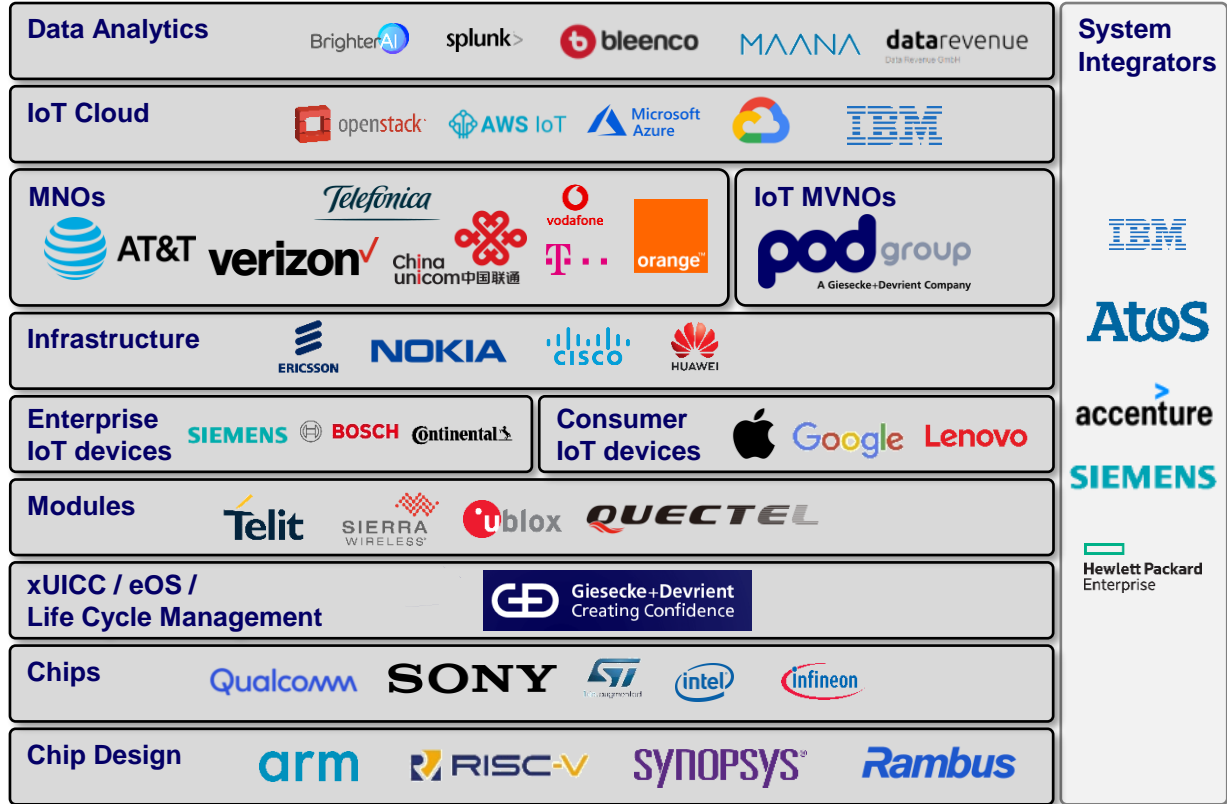
Enterprise

Fragmented IoT market – big companies position themselves

but

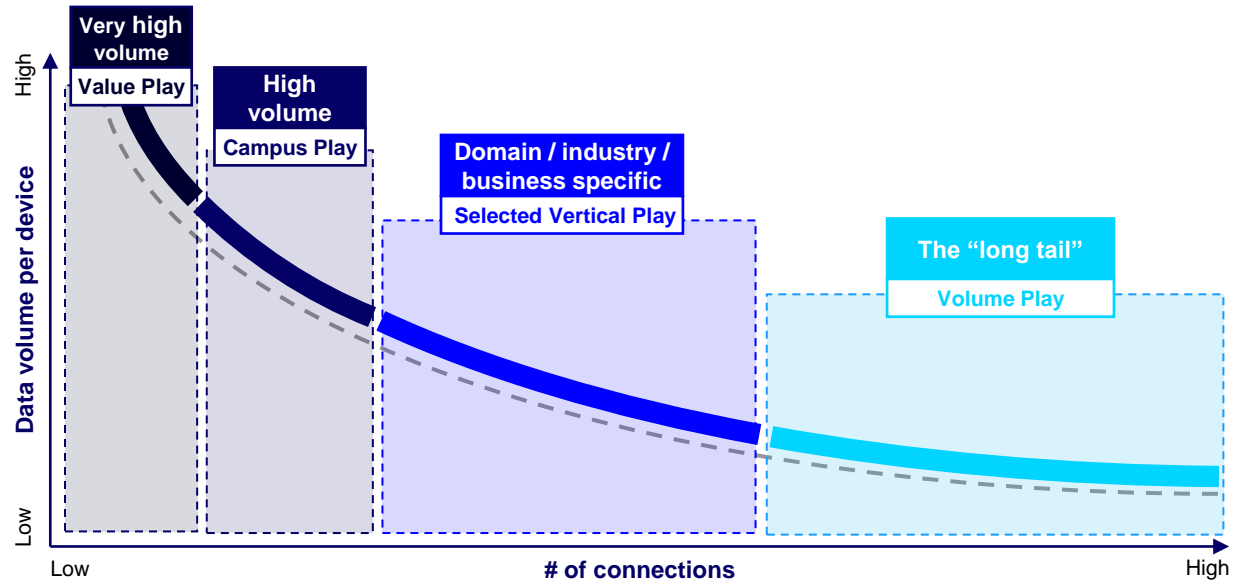
lack of vertical integration



Note: companies are examples in their business area, the list is non-exhaustive

The very large IoT market requires a differentiated play

IoT segments require different solutions and a differentiated go-to-market approach



Roll-out strategies and investments will determine who's selected for value play

Campus networks are very hot topic with **MNOs and Hyper-Scalers** moving in

Vertically integrated solutions require **domain know how and end2end solutions**

The long tail needs **easy to use APIs / SaaS to core IoT ingredients and suitable HW**

**Trusted data is the new oil
and trusted global
connectivity is the pipeline
fueling the digital society**



**Our vision is to enable,
secure, and help monetize
every connection and
identity in the IoT**



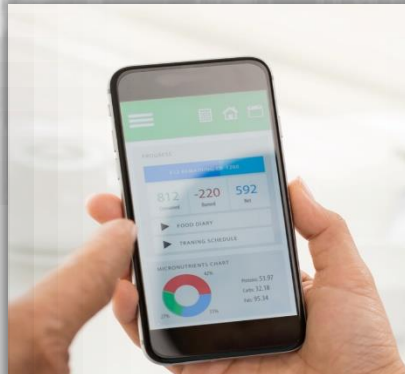
Being a security technology company means a lot to us:

G+D is a reliable partner and world leader in providing security. Contact us!



Payment

Secure physical, electronic and digital payment transactions



Connectivity

Trusted connectivity for mobile devices in the Internet of Things



Identities

Safeguarding identities and authentication of persons and objects



Digital Infrastructures

Protecting systems, networks and confidential data



Creating Confidence



Your partner for Trusted IoT!