Connected Living Programme

Operator opportunities in the new Connected World

24th April 2013

Bogota, Colombia. April

Confidential Information

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Agenda

- **Operator opportunities in the new Connected World**
  Richard Cockle, Programme Director, Connected Living, GSMA
  - *Socio-economic impact of Connected Living*
  - *Operator opportunity*
  - *Barriers to implementation*
  - *Technology, interoperability and roaming requirements*

- **Claro strategy on M2M in Colombia**
  Jairo Contreras Pedreros, Claro
  - *Claro's view on the opportunity that M2M will bring*
  - *How M2M could be used in Automotive*

- **Q&A Panel**

- **mEducation - How can operators make a difference to education in Latin America**
  Moderator, Jill Attewell, GSMA
  Dr Miguel Brechner, President of Plan Ceibal, Uruguay
  Edith Saldivar, Government Affairs Staff Analyst, Qualcomm
  - *Why operators should care about mEducation*
  - *How can operators make a difference to education in the Latin America Region*

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Connected Living Programme Direction

- The Connected Living Programme is designed to help put **operators at the centre of connecting adjacent industries**, unlocking the revenue opportunity from new connections, new partnerships and most importantly from services beyond simple connectivity
- In order to **accelerate the delivery of this revenue opportunity**, the GSMA's programme is focused in:
  - **eliminating existing barriers** that require collective action (e.g. roaming);
  - **stimulating market implementations** where operators provide more than network connectivity;
  - **promoting the necessary supporting evidence** that will convince major stakeholders to work with the mobile industry and will unlock the market demand.
- The programme's actions are focused in **three main verticals** - **Automotive, Education and Health** - and in the delivery of **Smart City demonstrators** (through Mobile World Capital).
- **The verticals have been selected by the mobile operator leadership** in the programme by considering the following variables: revenue opportunity, complexity of the ecosystem, need for collective action to eliminate vertical specific barriers.

The programme aims to achieve a 20% increase from the current projected revenues for 2016

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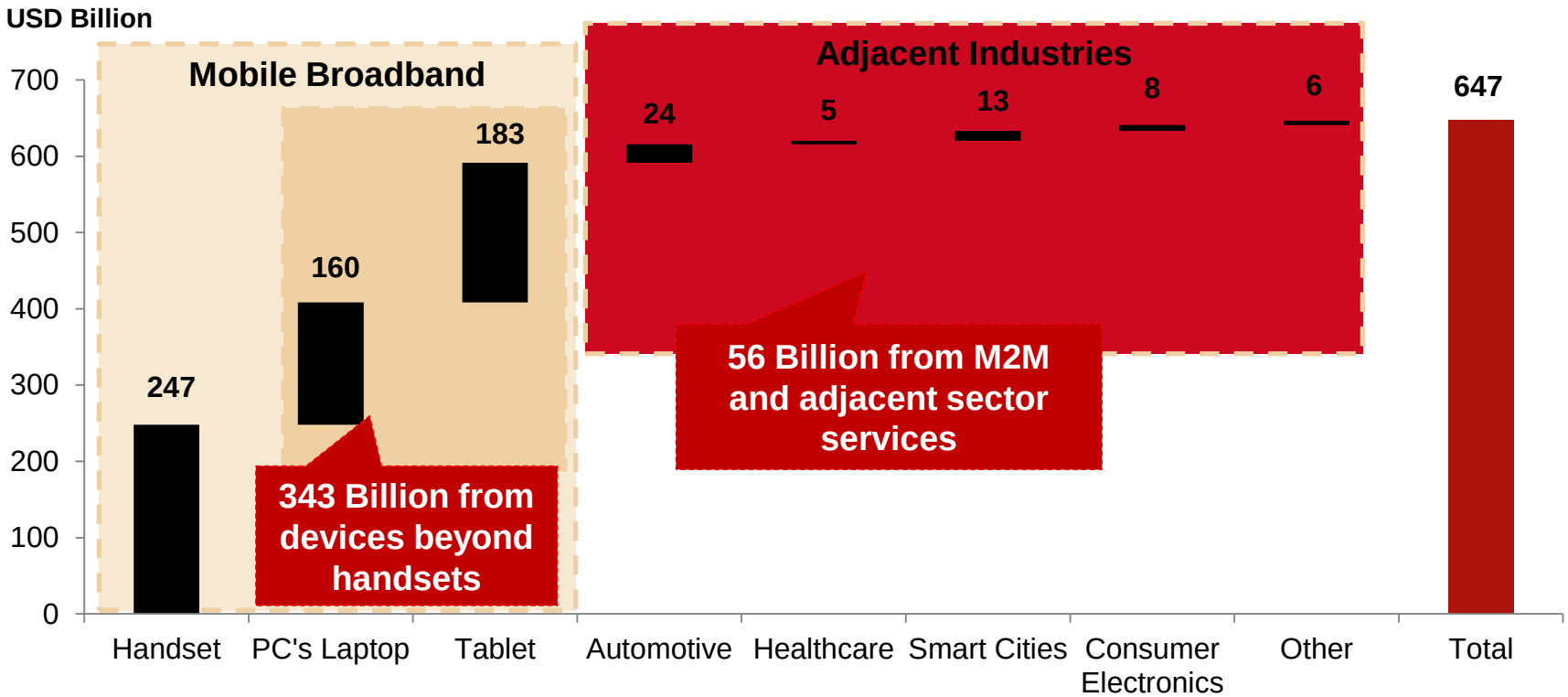
Total revenue opportunity in 2020 is $647 Billion, $56 Billion from M2M and adjacent industries

Expected Operator revenues in 2020



	Handset	PC's Laptop	Tablet	Automotive	Healthcare	Smart Cities	Consumer Electronics	Other	Total
Operator's share of addressable opportunity*	100%	39%	72%	15%	12%	20%	10%	13%	50%

*Addressable opportunity identifies the share of total revenues that mobile operators could compete for. Some of the addressable revenue will be taken by competition.

Source: Machina Research September 2012

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Connected Living Programme Scope 2013/14

Market Barriers

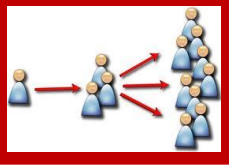
Barrier: Global deployments
Roaming

Barrier: Provisioning
Embedded SIM

Barrier: Regulatory
Market Interventions

Barrier: Cost of modules
Embedded Mobile Guidelines

Barrier: Stakeholder market knowledge
Marketing Campaign



Vertical focus

Healthcare

Automotive

Education

Smart Cities

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