



Connected Living



Connected Living Programme Overview

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Connected Living Asia Summit



Day 1: General overview

- 1.00 - 1.45 pm – Welcome and overview
- 1.45 - 3.20 - Realising the potential of the Connected Life Seminar
- 4.00 - 5.00 - Webinar - How the Connected Life Drives Revenue
- 6.00 - 7.30pm Networking Evening Event

Day 2: Deep dive into the verticals addressed by GSMA

- 8.30 - 12.30 mAutomotive and mHealth Workshops
- 1.30 - 5.00pm mEducation and Smart Cities Workshop
- 6.00 - 7.30pm Networking Evening Event

Day 3: Experience Sharing Tour

- 9.00am - 5.00pm: Visit to Dongtan - Smart City including M2M Monitoring Centre

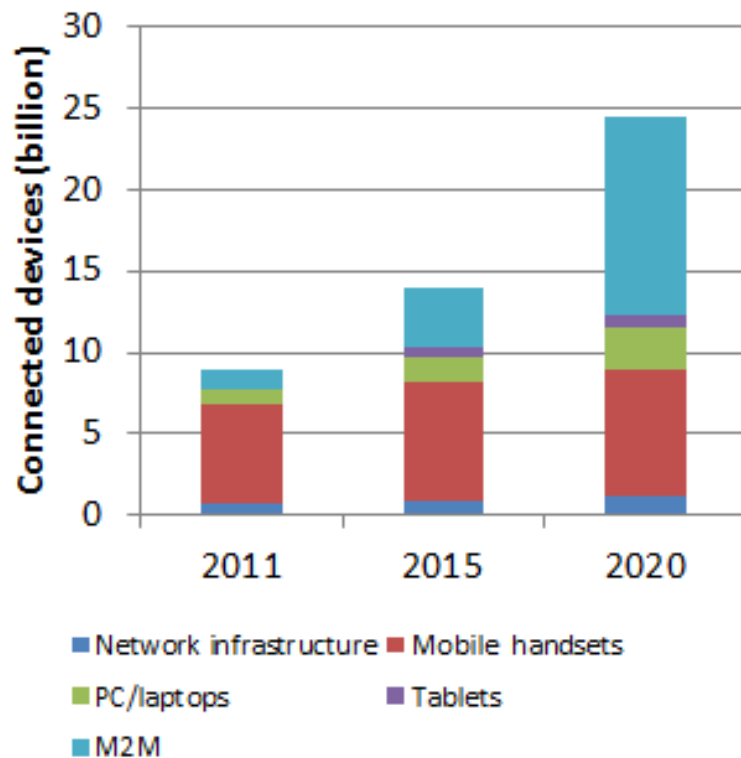
THANK YOU TO KT

Number of connected devices is growing



Connected cellular devices by technology 2011-2020

Source: Machina Research, 2011



- Global connected devices will increase from 9 billion in 2011 to 24 billion in 2020 across all technologies; 50% will be mobile
- Growth will be dominated by M2M, which will account for half of all devices in 2020, up from 14% in 2011
- 2.3 billion cellular M2M devices in 2020

TOTAL OPPORTUNITY FOR MOBILE OPERATORS = 1.2 TRILLION USD

GSMA's Connected Living Programme



mEducation



mAutomotive



mHealth



Smart Cities



700 MILLION CONNECTIONS BY 2013

Accelerate and remove the existing barriers for the Connected Life



- Operators starting trials using GSMA's evidence framework
- Reference architecture for remote monitoring
- Position on medical device regulation
- Worldwide Market sizing US\$23 Billion by 2017



- Global Mobile Education Landscape
- Mobile Proposition for Education
- Privacy and Security Guidelines
- Worldwide Market value US\$70 billion by 2020



- Technology Roadmap
- Connected Car Forums (Europe, Asia, China) active
- Whitepaper Business Models & Operator Assets
- Worldwide Market value for Embedded Telematics Solutions US\$20 billion by 2020



- Smart Home Vision
- Smart Home Gateway requirements
- Smart Utilities Business Models report

WE ARE NOW STARTING A NEW PHASE

mHealth - Remote Monitoring Chronic Disease

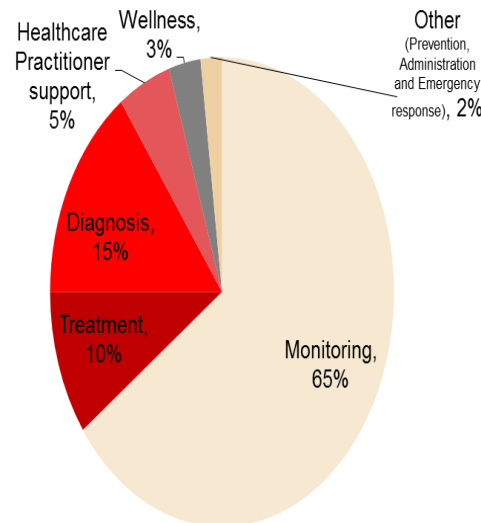
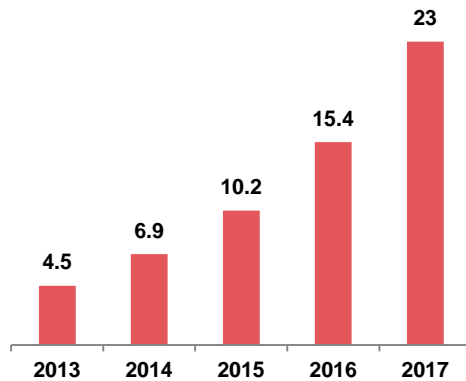


Mission

To reduce the cost to serve, extend reach and improve quality of care to patients, by accelerating the development and adoption of scalable and interoperable operator led mobile health solutions



Forecast global mHealth revenue 2013-2017 (USD Billion)



Diabetes Care Programme

Over 346 million people worldwide have diabetes, it is forecast to double over the next 20 years. In some regions it affects 20 – 25% of the population.

The patients require regular monitoring, making it the perfect candidate for mobile health.

Operators have identified diabetes as a key strategy area. They are keen to collaborate on developing scalable solutions with sustainable business models.

DIABETES FOCUS

mEducation – Key education scenarios



Vocational education and training



Consistent connectivity for children



Out of classroom education and collaboration



Professional learning and development



Literacy skills



Supporting students with learning difficulties and disabilities

TABLETS FOR SCHOOL CHILDREN AND LEARNING FOREIGN LANGUAGES



Telematics

The number of telematics mandates by governments is growing e.g. eCall or Stolen Vehicle Tracking.

Total opportunity by 2020 is US\$20 billion



Infotainment

Infotainment services are forecast at 80% of all automotive traffic by 2025.

Today, only 28% of automakers offer connected infotainment services.

Value Added Services examples:

- Network security and user authentication
- Charging & Billing
- Customer relationship management
- Device management
- Application store support

Source: SBD

REMOVING BARRIERS TO CONNECTIVITY

Smart Cities Demonstrator



Demonstrating practical implementation examples of Smart Cities, with great focus on Mobile World Capital

EXPERIENCE SHARING TOUR TO DONGTAN, INCLUDING M2M MONITORING CENTRE



mEducation



Programme Structure and How to Participate

Embedded Mobile Programme Organisation



Health

Automotive

Education

Service Awareness in Roaming

**Smart Cities Demonstrator
(Mobile World Capital)**

Connected Experiences Campaign

Operator Leadership

Board Sponsors

KT, Telenor,
Vodafone

Programme Leadership Group

AT&T, KT, Telenor,
Vodafone

Embedded Mobile Programme Organisation



Deliver working demo of the UICC/SIM capabilities
10 service trials or launches
Trial/Service Evidence Assessment Report

Health

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Development of 3 planned market trials or service launches

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8 mEducation trials or service launches
Demonstrate active engagement and support of 1 or 2 governments endorsing the usage of mobile

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Health

Automotive

Education

Implement and demonstrate new roaming agreement between minimum of 2 operators with at least partial adoption of recommended changes in the roaming model

Service Awareness in Roaming

**Smart Cities Demonstrator
(Mobile World Capital)**

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Health

Automotive

Education

Smart Cities Demonstrator

Develop and implement minimum of 3 demonstrator proposals (mHealth/mEducation/Smart City) to be adopted by MWCap

Smart Cities Demonstrator
(Mobile World Capital)

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Health

Automotive

Education

Service Awareness in Roaming

Promote the vision of an everything connected world
Demonstrate the “next wave” of mobile devices,
propositions and services

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Leadership Group**

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Vodafone

Participation Options



Workstream	Operator GSMA member	Associate GSMA Member	Non-Member
Service Awareness in roaming	<input checked="" type="checkbox"/>		
mHealth	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
mAutomotive	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Connected Car Forum	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/> Autom. OEM
mEducation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Connected Experiences	Connected House		

GSMA Connected House



- Almost 6,500 visitors over 4 days, 592 C-level;
- >375 press, media & analysts visited the House;
- 300+ guests at VIP event including Ralf de la Vega (CEO AT&T) and John Chambers (CEO Cisco);
- Ministerial delegations including a tour by the Spanish Health Minister;
- 67 news articles, >350 press release syndications, significant broadcast media, achieved >£3.5m advertising value equivalent.
- New venue, more space, bigger house, more value - secure your place in the House for 2013



How to participate?



- Declare your interest to the Programme and relevant workstream to connectedliving@gsm.org
- No financial contributions required – only resources and commitment to participate and to contribute
- Non-members need to sign a non-member participation agreement
 - Duration 3 months, after that membership is required
 - Exceptions are monitored on a case-by-case basis
 - Contains mutual NDA and IPR regulation
- Benefits
 - Influence and contribute to programme objectives & activities
 - Additional marketing value