

Machina Research

The Connected Life

25 Billion Connections by 2020

Jim Morrish, Director

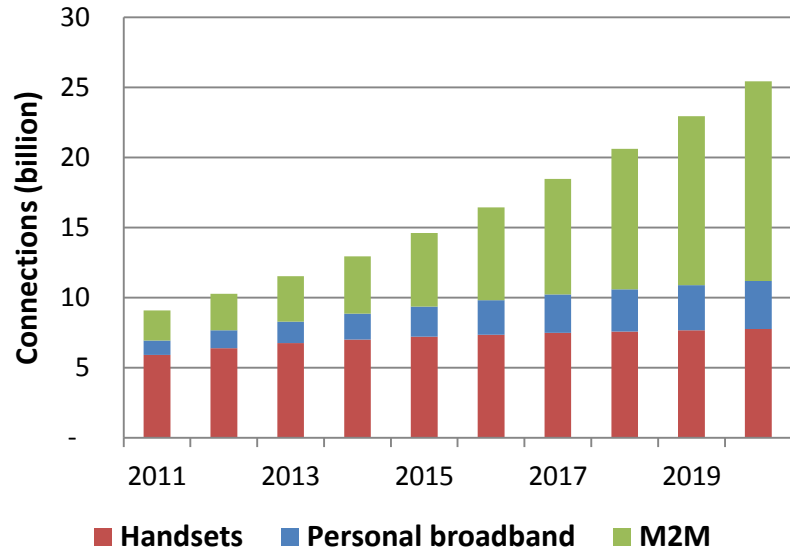
June 2013

- **The Connected Life 2011-2013**
- **Next steps in the Connected Life**

The Connected Life: 25 billion connections in 2020

The Connected Life 2011-20

Source: Machina Research 2013



- Significant growth over the period to 2020

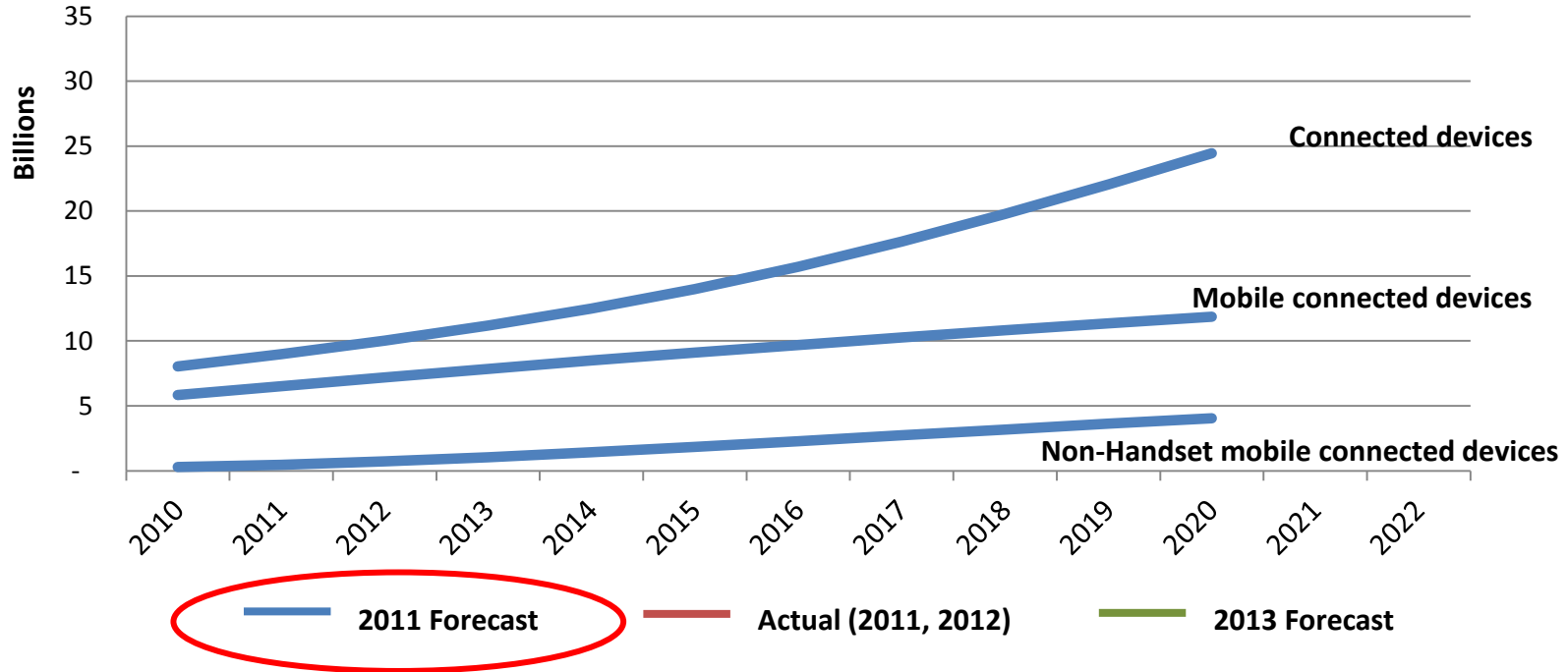
- +1.2bn handsets
- +2.0bn tablets, eReaders, laptops
- +11.3bn M2M connections

- Machina Research defines M2M as “Connections to remote sensing, monitoring and actuating devices, together with associated aggregation devices”

Does the reality match the hype ...?

Connected device forecasts, 2011 and 2013

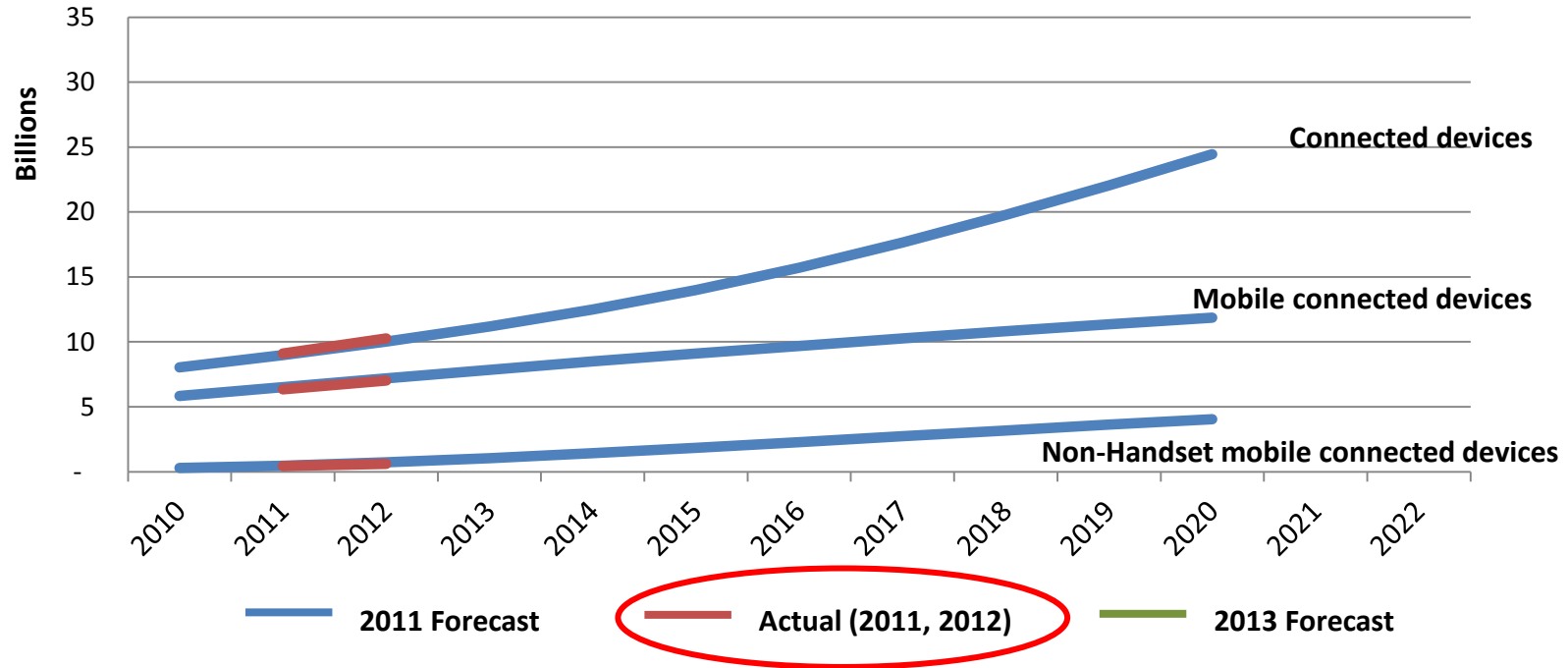
Source: Machina Research 2013



Does the reality match the hype ...?

Connected device forecasts, 2011 and 2013

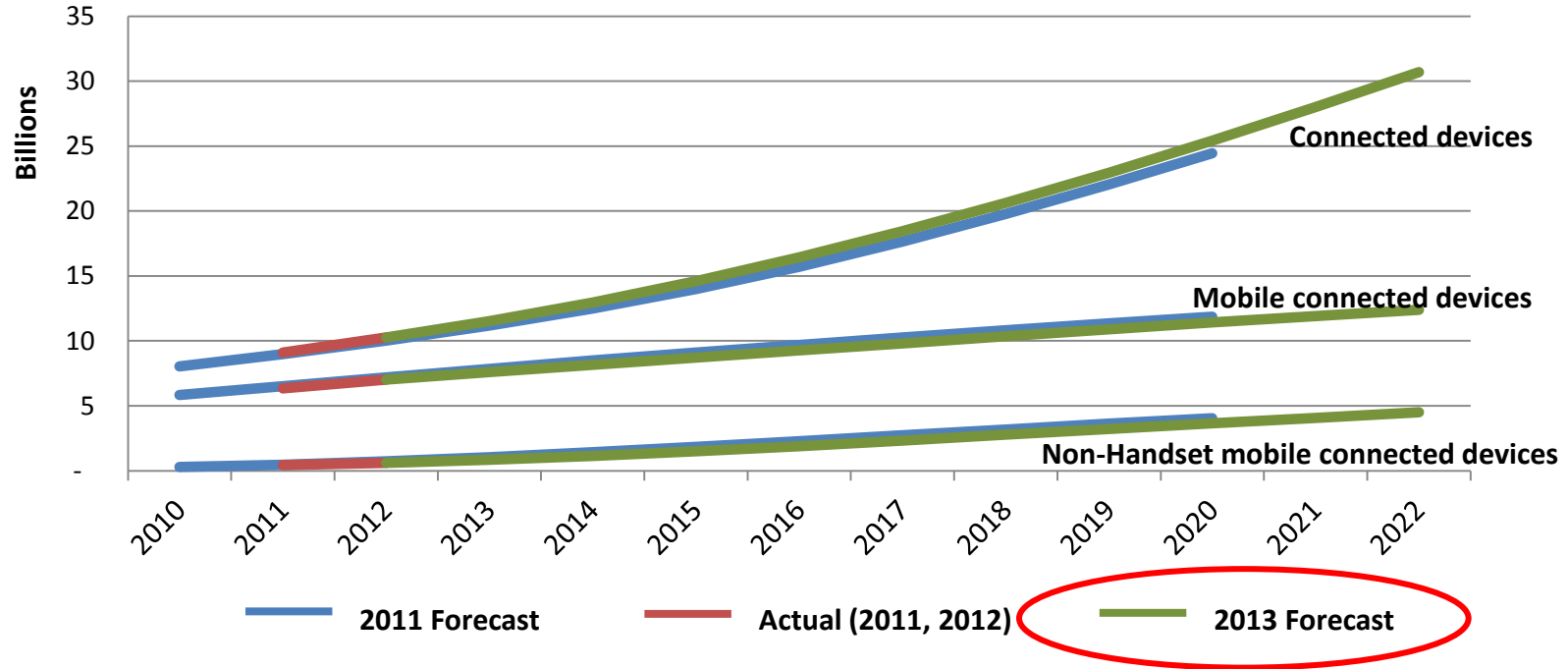
Source: Machina Research 2013



... it seems to, so far.

Connected device forecasts, 2011 and 2013

Source: Machina Research 2013



Leading lights of the Connected Life

- **Tracker (South Africa)**
- **Coyote (France)**
- **TollCollect (Germany)**
- **Fleet management**
- **Asset tracking**
- **Tablets**

- **The Connected Life 2011-2013**

- **Next steps in the Connected Life**

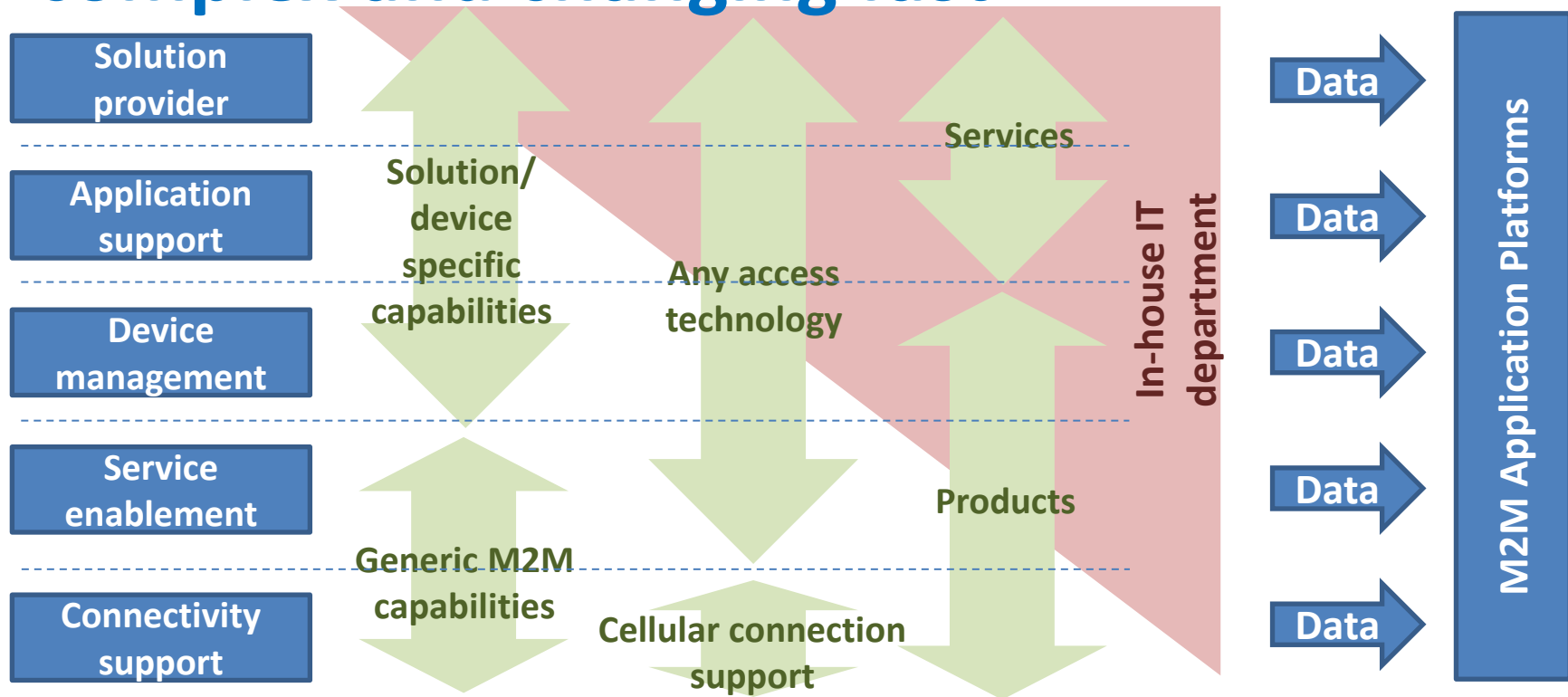
M2M connections: more than a number

Machina Research Hierarchy of M2M

Source: Machina Research 2013

Stage	Description	Comments
1	Reactive information	<ul style="list-style-type: none">Devices can be polled for information, or provide information according to a set timetable
2	Proactive information	<ul style="list-style-type: none">Devices communicate information as necessary
3	Remotely controllable	<ul style="list-style-type: none">Devices can respond to instructions received from remote systems
4	Remotely serviceable	<ul style="list-style-type: none">Software upgrades and patches can be remotely applied
5	Intelligent processes	<ul style="list-style-type: none">Devices built into intelligent processes
6	Optimised propositions	<ul style="list-style-type: none">Use of information to design new products
7	New business models	<ul style="list-style-type: none">New revenue streams and changed concept of 'ownership'
8	The Internet of Things	<ul style="list-style-type: none">Publishing information for third parties to incorporate in applications

The M2M platforms environment is complex and changing fast



Hot growth areas in the Connected Life

- Usage Based Insurance
- Connected home
- Healthcare
- Fleet management
- Asset tracking
- The Internet of Things

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