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Realising the benefits of mobile-enabled IoT solutions

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The Internet of Things is a reality today, and within a few years it could transform the global economy

Mobile is at the core of the IoT ecosystem



Expected impacts by 2020

\$4.5 Tn

IoT impact on global economy



4%

IoT additional impact on global GDP



Source: PwC estimates, Machina Research, The World Bank

IoT comprises of a global production and distribution model

Distinct elements of the value chain will be performed in different geographies

Example: learning

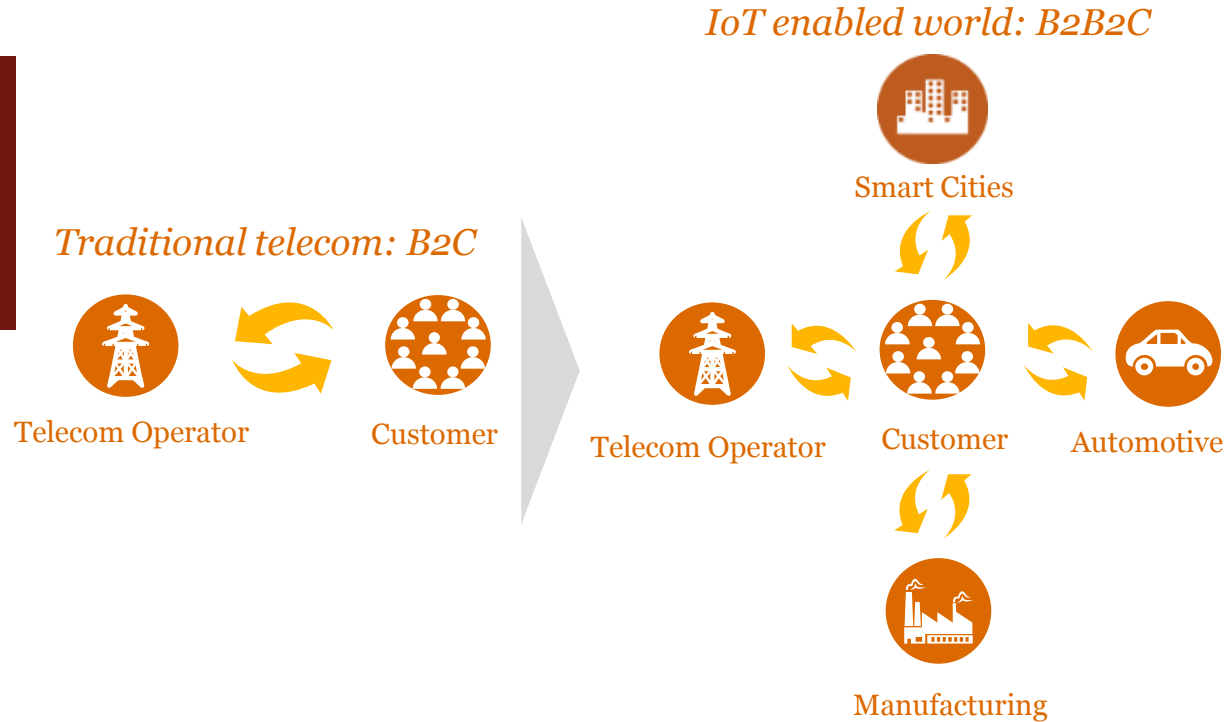
Learning content created in one location



Distributed in many markets enabled by cloud, analytics and connectivity

In the IoT world, the customer will be accessed by many

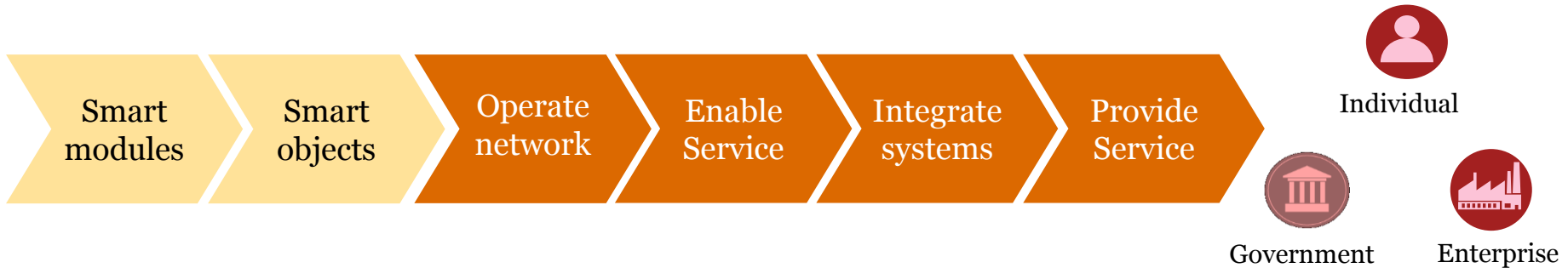
Many companies will access their customers directly to discuss their connectivity needs



Source: PwC analysis, GSMA

The IoT will result in greater competitive intensity

Companies will build x-industry alliances and partnerships, increasing the intensity of competition



Source: PwC analysis, ADL

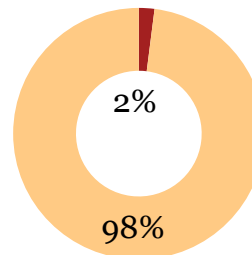
IoT presents mobile operators an opportunity to sustain and accelerate growth beyond consumer voice and data

Mobile operators are acquiring new skills and partnerships to extend the business

\$39 Bn

Connectivity services
revenue from IoT in
2022

Telecom industry revenue, 2022



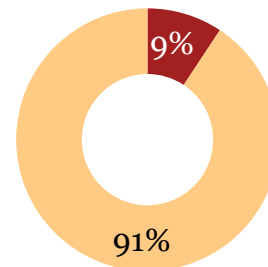
■ IoT connectivity
revenue

■ Other Telecom
revenue

\$422 Bn

Total services revenue
from IoT in 2022

M2M total service revenue, 2022



■ Connectivity
services

■ Other IoT
services

The IoT world will introduce unprecedented scale and new patterns in network usage and behaviour

*Analysts expect >27bn
connected devices by 2020*

Multiple technologies



New patterns in network usage



Smart Meters
Frequency: Monthly
Size: 5Kb/message



Video Surveillance
Frequency: Real time
Size: 10Mb / minute



ERS
Frequency: Rarely
Size: 5Kb

The IoT could transform economy and society, but it is still at a nascent stage

IoT impacts to be realised requires an investment-friendly environment and policy neutrality

An environment that safeguards IoT local growth and global scale



X-industry and global collaboration, fairness and consistency



Thank you

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