



Internet
of Things

Mobile IoT Marketing Update

3 August 2017

Agenda

- MWC Shanghai Recap
- MWC Americas
- Mobile IoT Messaging & Toolkits
- Events & Activities
- Marketing Update
- Mobile IoT Technology Mark Update

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Mobile IoT 2017/18 Objectives

Programme Outcomes

- Accelerate the growth of secure commercial LPWA-based IoT solutions in licensed spectrum resulting in large numbers of commercial LPWA launches by operators
 - KPI - 35 commercially launched Mobile IoT networks
 - 11 global launches YTD

Marketing Outcomes

- Mobile Operators recognised as trusted and low cost providers of 3GPP standards based licensed low power wide area (LPWA) networks
- Reset Smart City and Utility verticals perception of operator value and capability & communicate benefits of MIoT technologies through high profile collaborative jointly funded marketing and PR initiative
- Identify and engage with early adopter Mobile IoT developer community

Operator	Technology	Location
AT&T	LTE-M	US
China Mobile	NB-IoT	China
China Telecom	NB-IoT	China
China Unicom	NB-IoT	China
DT	NB-IoT	Germany The Netherlands
KT	NB-IoT	South Korea
LGU+	NB-IoT	South Korea
Verizon	LTE-M	US
Vodafone	NB-IoT	Spain The Netherlands



Mobile IoT Initiative – Summary

- Accelerate global adoption of NB-IoT & LTE-M by Operators, Ecosystem and Key Vertical Industries
- Develop aligned industry messaging to clarify communication
- Communicate benefits & opportunity to global operators and key verticals Utilities, Smart Cities & priority solution developers
- Increase event, webinar and digital communication during 2017/18 to accelerate technology adoption
- Marketing budget £0.5m – funded by GSMA and sponsorship of key events
- Deliver technology supporter marks for NB-IoT and LTE-M
- Review progress at quarterly conference calls



Mobile IoT Initiative – Work in Progress

Sponsorships

- Mobile World Congress Shanghai
 - Mobile IoT Summit: Huawei & Sequans Communications
- Mobile World Congress Americas
 - Hackathon & Developer Workshop: AT&T
 - Mobile IoT Summit: Nokia & Sequans Communications
 - Networking Reception: Huawei
- Webinar Series
 - Cisco Jasper, Huawei & Telit



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The banner features a red background with a network of white lines and circular icons representing various IoT applications like parking, light bulbs, airplanes, and cars. On the left, the GSMA logo is above the text 'Internet of Things'. In the center, a large 'IoT' logo has a smartphone icon inside the 'O'. To the right, the text 'at Mobile World Congress Shanghai' is displayed, with 'Shanghai' in yellow. Below this, 'MWC上海物联网' is written in white. At the bottom, the event dates are listed in both English and Chinese: 'Mobile World Congress Shanghai 27 June, 28 - 30 June' and 'MWC上海6月27日, 6月28日至30日'.

GSMA Internet of Things

IoT at Mobile World Congress
Shanghai
MWC上海物联网

Mobile World Congress Shanghai 27 June, 28 - 30 June MWC上海6月27日, 6月28日至30日

The banner features a white background with vibrant, abstract pink and yellow splashes on the left and right sides. In the center, the Chinese characters '势在人为' are written in a large, bold, pink-to-yellow gradient font. Below them, the English text 'THE HUMAN ELEMENT' is written in a smaller, bold, pink font.

势在人为
THE HUMAN ELEMENT

Event Highlight



Internet of Things

Tuesday 27th June

14.00 - 18.00 Mobile IoT Summit – Himalayas Ballroom, Jumeirah Hotel
273 delegates

IoT Summit	590
Connected Vehicle Summit	280

4th GSMA Global Mobile IoT Summit





Internet of Things

Wednesday 28th June - Friday 30th June

Innovation City IoT Showcase Hall 3

Busy well attended exhibit

All Chinese Operators supported the exhibit with live NB-IoT network from China Telecom showing environmental monitoring. Other demos inc. CMCC – OneNET, Unicom – smart watches, NB-IoT lighting & hire bikes



PR activity around MWC Shanghai has resulted in:

- **6,651** coverage hits worldwide to date:
 - **852** original pieces of broadcast, print and online coverage
 - **2,182** syndications of original coverage
 - **3,617** press release syndications

GSMA Mobile IoT Initiative Takes Off With Multiple Commercial Network Launches Around The World

- Total Coverage: **773**,
 - Original Articles: **17**
 - Syndications: **756**



Source: [RFID World CN](#)

1. 物聯網裝置 助改善地球生態 (IoT device helps improve ecosystem on earth), Hong Kong Economic Times, 6 July 2017



Source: [HKET](#)

NB-IoT開啟規模商用「黃金時代」

大陸資訊 | 07月04日

無遠弗屆的NB-IoT商用，是移動物聯網發展的重要里程碑，2017年將是NB-IoT商用元年。正在舉行的「2017世界移動大會」(MWC)成了移動物聯網的舞臺，尤其是NB-IoT(窄帶物聯網)，從芯片模組、平台支撐、應用場景等各層面，在這次通信盛會上得到了展示，展現出產業鏈的強大實力。



Shane Rooney博士

Source: [XCN News](#)



IoT Social Media

Social media played a key role in promoting MWC Shanghai, with nearly 650 outbound posts on GSMA social media channels and 510,000 mentions from all keyword groups during the week.

- Mobile IoT pages continue to attract large audiences
- Average page views up 15% 9,100 > 10,500
- 3 promo blogs
 - AT&T and China Unicom announce nationwide Mobile IoT
 - Exploring China's IoT
 - New IoT technology integral to China's Smart City Vision
- 2 blogs during the event
 - GSMA Mobile IoT Initiative takes off
 - Operators Deliver New Commercial Era of Mobile IoT
- **130,509** Social Media Impressions in June (up from 112,929 in May)

Follow GSMA on [Twitter](#) and GSMA IoT Showcase Page on [LinkedIn](#)



July 7, 2017

Rapid Growth of Mobile IoT Innovators Underscores Power of LPWA in Licensed Spectrum

Having reached over 540 members since 3GPP's standardisation of Mobile IoT technologies in June 20...



June 29, 2017

Operators Deliver the New Commercial Era of Mobile IoT

Presentations from the event can be found below Shanghai: Industry experts gathered on Tuesday to d...



June 26, 2017

GSMA Mobile IoT Initiative Takes off with Multiple Commercial Network Launches Around the World



June 19, 2017

The New IoT Technology Integral to China's Smart City Vision

GSMA's Smart, Secure, Scalable IoT



Mobile World Congress Americas

Event details: <https://www.gsma.com/iot/event/mobile-world-congress-americas/>



9 Sat	10 Sun	11 Mon	12 Tue	13 Wed	14 Thu
			Mobile World Congress Americas		
AT&T IoT Developer Hackathon	AT&T IoT Developer Hackathon	Mobile IoT Innovators Developer Workshop (10:20-13:00)	IoT in the GSMA Innovation City (09:00-17:00)		
		GSMA Global Mobile IoT Summit (14:00-17:00)	GSMA Mobile IoT Innovators Showcase at 4YFN (09:00-17:30)		
		Mobile IoT Innovators Networking Reception (17:00-18:30)			GSMA Connected Vehicles Summit (11:00-17:00)

Mobile IoT Messaging & Toolkits



Aligned Industry Messaging

Overall theme continue with Mobile IoT = **Trusted IoT**

- Five simple positive industry statements that will resonate with media
- Repetition by multiple parties with assist market adoption & amplify impact
- Alignment for a more powerful industry campaign
- Evolve over time to reflect industry requirements
- Underpin the Mobile IoT Industry Marketing & PR Initiative



Key Industry Initiative Messages – Mobile IoT = Trusted IoT

- ➔ The mobile industry is **launching commercial NB-IoT and LTE-M** networks in 2017 to realise the LPWA mass market IoT opportunity.
- ➔ 3GPP standard technologies NB-IoT and LTE-M are able to be **deployed quickly** by adapting existing mobile networks to **securely and sustainably scale** the market.
- ➔ Mobile IoT operators will support **roaming and interoperability** to provide high quality, cost effective global coverage for IoT solutions.
- ➔ Mobile networks using these technologies deliver **extended coverage** & support low power devices with **long battery lives**, up to 10 years, to support **mass market industrial and smart city applications**.
- ➔ Focusing on standardised Mobile IoT technologies will allow **cost effective delivery of service** and, with scale, supply mobile modules for devices for a few dollars.
- ➔ Mobile operators and their ecosystem partners are experienced, **trusted providers** of managed M2M solutions with existing mobile networks, so are best placed to extend their reach to serve the full range of IoT applications. Mobile IoT = **Trusted IoT**.



Mobile IoT Toolkit – 2017/18

- The Marketing Toolkit has been fully updated and can be accessed [here](#)
- All materials are available to use for Mobile IoT promotional activities
 - Industry messaging
 - Event collateral
 - Digital assets
 - Mobile IoT Innovators





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Events and Activities

Get the latest update at <https://www.gsma.com/iot/events/>



Mobile IoT – Up-Scaled Events Activity

Accelerated Events Plan

- Dedicated Mobile IoT webinar series
- Vertical & Developer events
- More Mobile IoT Summits

Date	Event
9 th & 10 th Sep 2017	<u>AT&T IoT Developer Hackathon</u>
11 th Sep 2017	<u>The 5th Global Mobile IoT Summit</u> - San Francisco
11 th Sep 2017	<u>Mobile IoT Innovators Developer Workshop & Networking Event</u> – San Francisco
12 th Sep 2017	<u>Connected Vehicles Summit</u> – San Francisco
27 th Sept 2017	Webinar - Mobile IoT for Utilities
3 – 5 th Oct 2017	<u>European Utility Week</u> – Mobile IoT Showcase Amsterdam
25 th Oct 2017	Webinar - Mobile IoT for Smart Cities
14 – 16 th Nov 2017	<u>Smart City Expo World Congress</u> – Barcelona
28 th Nov – 1 st Dec 2017	Mobile 360 NE Asia Seminar and Innovators Developer Event - Seoul
6 th Dec 2017	Webinar - Status of deployments & reports from customers
23 rd Jan 2018	Webinar - Mobile IoT for Developers
25 th Feb – 1 st March 2018	Mobile IoT Summit, Innovators developer event and showcase - Barcelona
21 st March 2018	Webinar - Vertical Focused (Topic TBC potentially Asset Tracking)



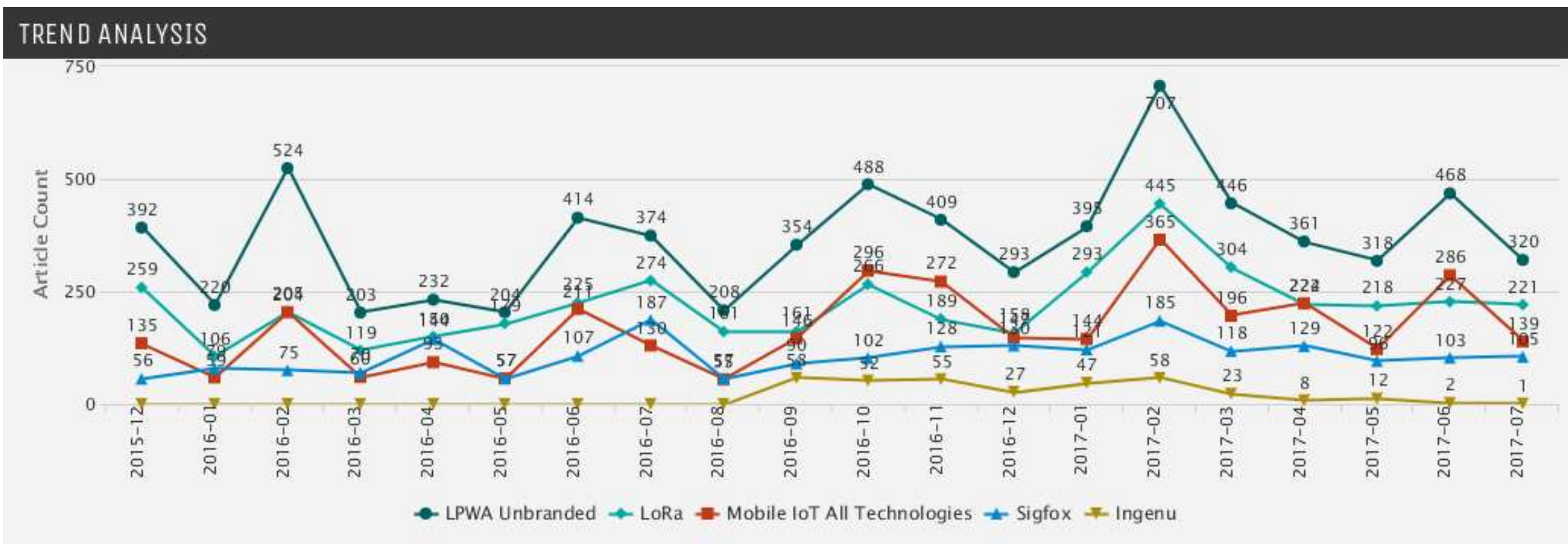
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Marketing Updates



Licensed technologies outpacing unlicensed in the worlds media

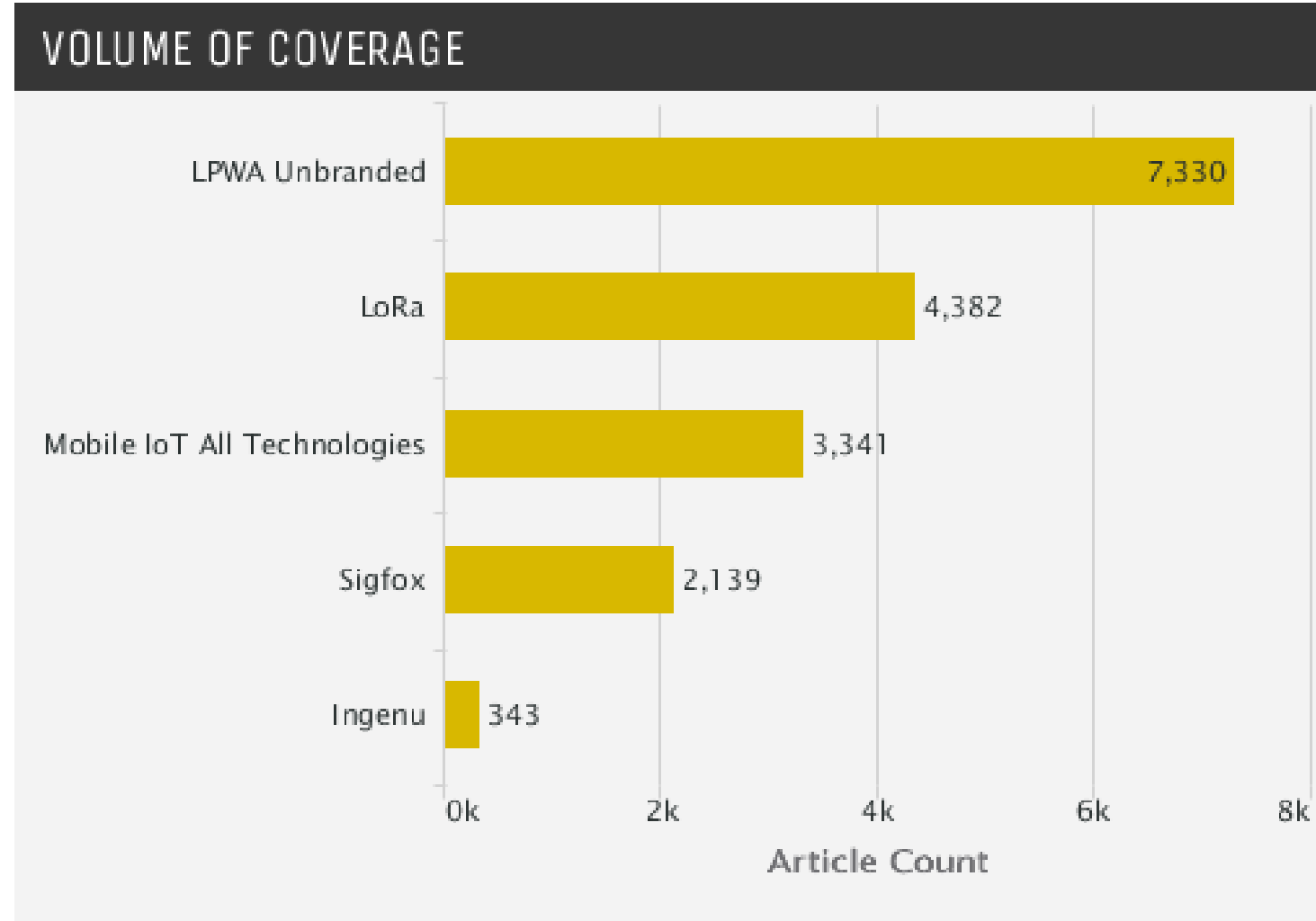
13,447 articles on LPWA analysed by Commetric (from Dec 2015 to Jul 2017)



Source: Commetric – 2 August 2017

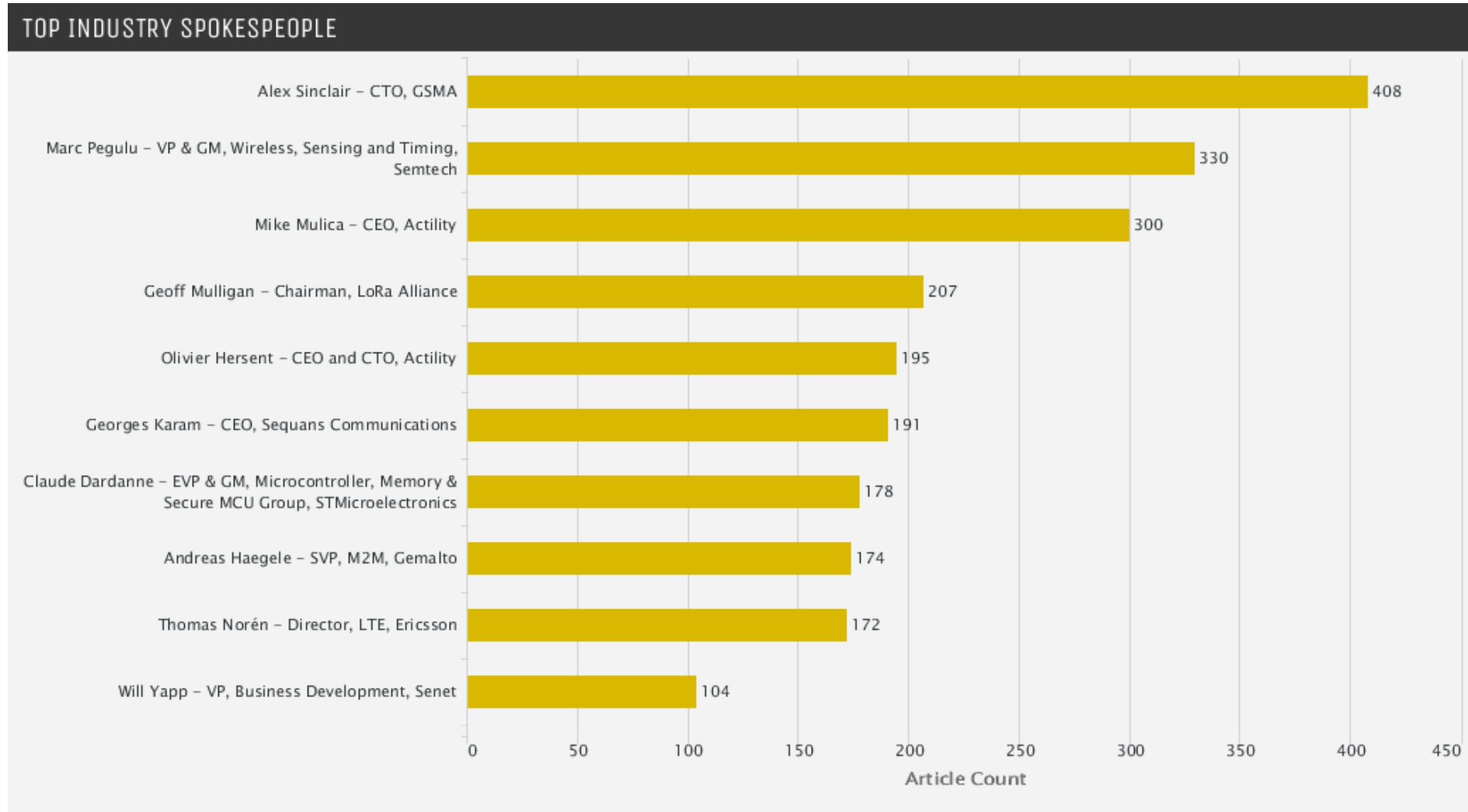


Volume of Coverage by LPWA Technologies



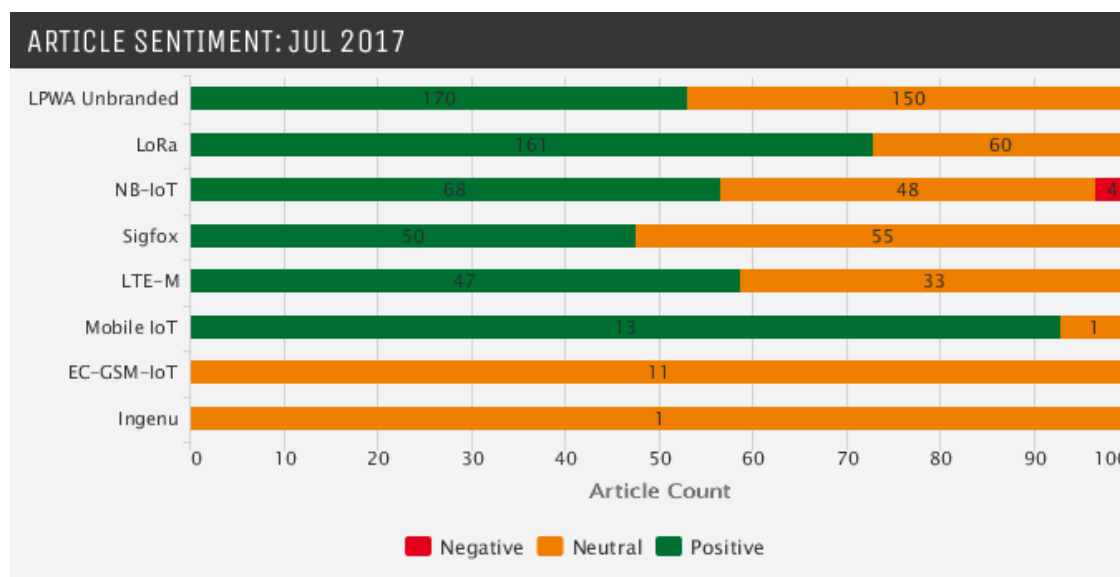
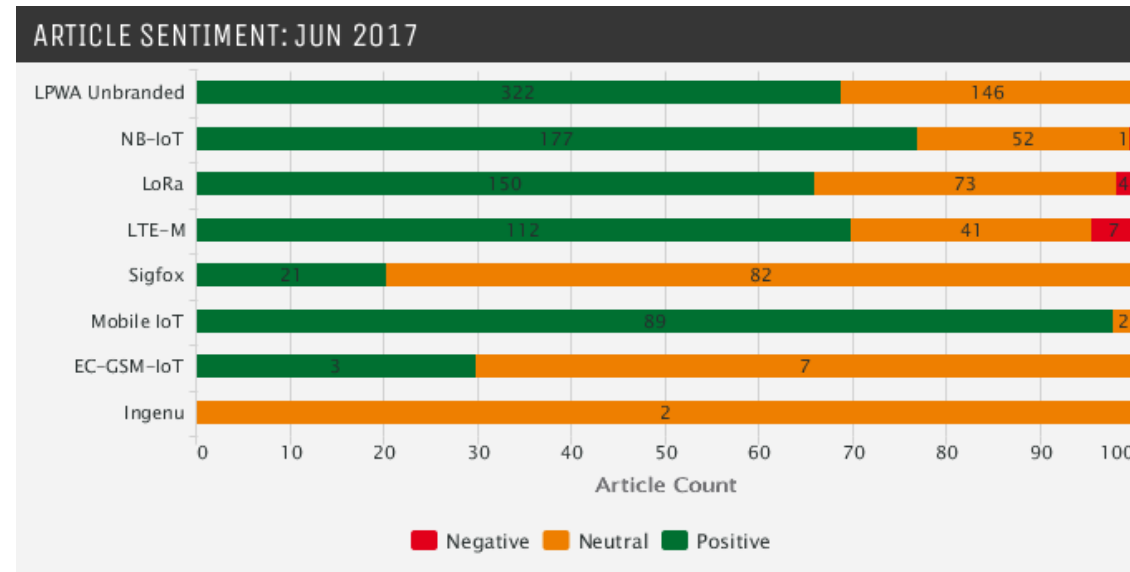
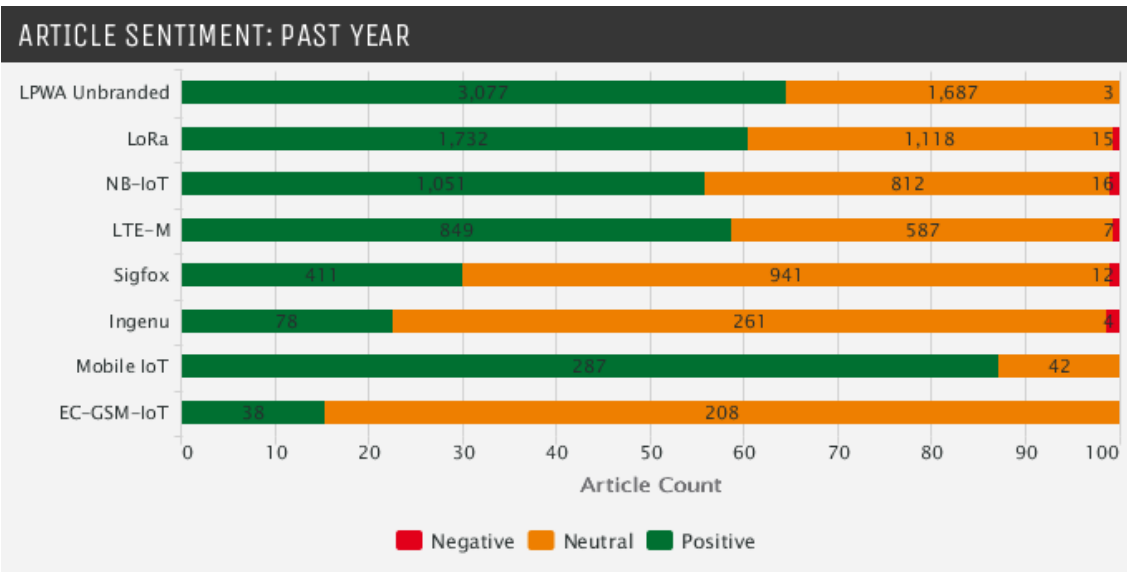
Source: Commetric – 2 August 2017

Top 10 Industry Spokespeople



Source: Commetric – 2 August 2017

Mobile IoT Sentimental Analysis





IoT & Mobile IoT Revenue Forecast

Sector	Metric	2017		2025	
All IoT	Revenue	1,318,700		3,651,046	
	Revenue (IoT Application)	666,151	50.52%	1,642,716	44.99%
	Revenue (IoT Services)	652,549	49.48%	2,008,330	55.01%
	Revenue (IoT Application: Recurring: Connectivity: Low Power Wide Area)	974	0.07%	23,749	0.65%
Connected Vehicles	Revenue	141,029		614,176	
	Revenue (IoT Application)	53,394	37.86%	252,964	41.19%
	Revenue (IoT Services)	87,634	62.14%	361,211	58.81%
	Revenue (IoT Application: Recurring: Connectivity: Low Power Wide Area)	2	4.94%	617	4.54%
Smart Cities	Revenue	58,613		184,649	
	Revenue (IoT Application)	25,875	44.15%	67,273	36.43%
	Revenue (IoT Services)	32,737	55.85%	117,376	63.57%
	Revenue (IoT Application: Recurring: Connectivity: Low Power Wide Area)	304	4.69%	2,880	2.84%

Definitions

Metric	Definition
Revenue	The sum of Revenue (IoT Application) and Revenue (IoT Services)
Revenue (IoT Application)	All income from the sale of IoT devices and related services.
Revenue (IoT Services)	The sum of Revenue (IoT Services: Applications), Revenue (IoT Services: Data Monetisation), Revenue (IoT Services: Platform & Middleware); Revenue (IoT Services: Project Work)
Revenue (IoT Services: Applications)	Includes application provision and hosting and application development.
Revenue (IoT Services: Data Monetisation)	Includes API monetisation, and sales of data and IoT services.
Revenue (IoT Services: Platforms & Middleware)	Includes all middleware and platform activities other than connectivity support.
Revenue (IoT Services: Project Work)	Includes work by systems integrators and consultancies, and also the monetary value of equivalent projects that are undertaken in house.
Revenue (IoT Application: Recurring: Connectivity: Low Power Wide Area)	Low Power Wide Area network specific connectivity-related revenues.



Mobile IoT Web Content & Analytics Update: 1 Apr – 30 Jul

Summary: with almost 136,000 page views over the last 4 months, the GSMA's IoT site has become the de facto leading resource for updates, information and guidance on the deployment of the Mobile IoT.

Content



- 18 Mobile IoT news articles have features on GSMA website over the last 4 months
- Launch of Interactive '[Open Mobile IoT Labs Map](#)', '[Mobile IoT Rollout Report](#)', '[Mobile IoT Deployment Map](#)'
- Publication of full list of [Mobile IoT Innovators](#) with over 550+ companies
- Publication of list of [supporting developer kits](#), [module manufactures](#) and the mechanism for more to join



Upcoming updates

- New contents for Mobile IoT Rollout Report
- Updates for Mobile IoT Deployment Map



Analytics

- NB-IoT remains the most viewed page on the site with **9,967** page views
- Mobile IoT Initiative becomes 2nd most viewed page on site with **7,768** page views, LTE-M at the 5th with **4,279**



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Mobile IoT Technology Marks

Progress Update



Objectives

- Provide industry recognition for Mobile IoT
- Identify accredited & 3GPP's standard Mobile IoT technology
- Encourage Mobile IoT adoption
- Raise market awareness and support for Mobile IoT



Technology Mark Elements

- Unique from other technologies
- Easily recognisable and simple for communication
- Some of the technology features incorporated
 - Mobile
 - Low cost
 - Low power
 - Wide area
 - Secure
 - Globally ready
- Unregistered mark (common law ownership) [[reference](#)]



NB-IoT Technology Mark

Features:



Wide Area



Smart Meter



Global



Cellular

Options:



Option 1



Option 2



Option 3

The technology mark will be available in **red**, **black** and **white**.



LTE-M Technology Mark

Features:



Wide Area



Smart Meter



Global



Cellular

Options:



Option 1



Option 2



Option 3



Option 4



The technology mark will be available in **blue**, **black** and **white**.



Timeline

Date	Description
Mid-Aug	Logos ready and global trademark search starts
Early Sep	Logo toolkit ready
Mid-Sep	Update NB-IoT Forum and LTE-M Task Force
Mid- to late-Sep	Announcement through blog post, social media coverage





Next steps

- Feedback on toolkits, events plan and industry messaging
- Opportunities to participate & support events calendar
- Speakers and promotion of webinars
- Feedback on Mobile IoT technology mark
- Quarterly conference calls to review progress:
 - Next call: **12th October 2017**
 - January 2018
 - April 2018



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Thank You & Questions