



GSMA IoT Marketing Group Quarterly Update

11 March 2021

Andrew Parker, Marketing Director Technology, GSMA
Eric Yu, Senior Marketing Manager IoT, GSMA

GSMA Antitrust Policy

- Anti-trust law prohibits (i) agreements (written or implicit) between competitors which may negatively impact consumers or competitors and (ii) sharing of confidential information
- All GSMA participants **must** abide by the following rules:
 - ✓ **DO** clearly identify the positive purpose of each project and follow it
 - ✓ **DO** consult with legal in areas where you are unsure
 - ✗ **DON'T** enter into agreements that restrict other parties' actions or creates barriers to market entry
 - ✗ **DON'T** discuss or exchange information on pricing, business plans, or any other confidential or commercially sensitive data



IoT Marketing Group

GSMA INTERNET OF THINGS PROGRAMME 3



AGENDA





GSMA Foundry

A new collaborative approach to shape the future

Andrew Parker, Technology Marketing Director

11th March 2021

Welcome to the GSMA Foundry, where we shape the future



- The go-to place for cross-industry collaboration and business development, where GSMA members and industry players come together to rapidly develop real-world solutions to industry challenges, nurture new ideas through initial commercial trials and scale proven solutions at a regional and global level to forge our digital future.
- The Foundry utilises the global power and reach of the GSMA to convene, engage and unify the end-to-end connectivity ecosystem.
- Focus on fixed term tangible projects with resource commitments from partners

Shaping the future at every stage



Driving adoption of mobile enablers

Joint collaboration to promote the benefits of mobile enablers and drive adoption

Addressing an industry challenge

Bringing companies together to create innovative solutions and business opportunities to a specific challenge or industry issue

Nurturing an idea

Enabling Innovators to develop their ideas and generate proof points via in-market commercial trials

Scaling a proven solution

Scaling proven solutions in partnership with Operators and key Industry Partners

How to get involved?

- GSMA members and external companies joining as Activity Contributors
- Short term, focused projects with active contributing participants
- Different types of projects to benefit the industry
 - Open networking & flexible operator platforms
 - Scaling the Internet of Things
 - Enhancing security & trust
 - Big Data, AI and machine learning
 - Energy efficiency & renewable energy
- GSMA provides a framework and set of resources to help each project succeed (e.g., technical/legal/regulatory expertise, convening participants, admin & project management etc.)
- More information & web form <https://www.gsma.com/foundry/>

Foundry Project Idea - Examples

Advancing Mobile IoT

- Continue to drive Mobile IoT deployment by promoting 2G/3G sunsetting, eSIM/iSIM advancement, roaming partnerships, global deployment, etc.

Global IoT Marketplace

- Collect, publish and host the available IoT solutions and services onto the centralised web platform for one-stop easy access and navigation

The Mobile Formula 1

- Partner with motor track & vendor to build European C-V2X & 5G automotive test centre

Manufacturing Centre of Excellence

- Research & Test centre sponsored by government to educate manufacturers, suppliers and students in the application of 5G & Private Networks.

Connected Drone Port for VLOS

- Create a licensed mobile connected drone port, where new drone services, coordination, remote line of sight and high altitude can be tested with the latest 5G networks.

VR with eSIM/iSIM

- Build an VR and online immersive experience to showcase how eSIM & iSIM will transform connected devices. The immersive experience will be available online and a super experience will be available to event attendees with all the VR kit.



CONNECTED IMPACT

27 June - 1 July 2021

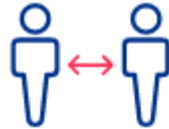


Protocol on Safety & Prevention against COVID-19



1. Use of face masks

Use of face masks is compulsory at the venues, except in specific parts of the catering area.



2. Social distancing

Spaces and access control, flows and capacities designed to ensure social distancing between people.



3. Sanitising stations

Deployment of hand sanitizing stations with hydroalcoholic gel dispensers throughout the venue.



4. Disinfection and cleaning

Reinforcement of the cleaning and disinfection protocols to fully guarantee the attendees' safety.



5. Reinforced ventilation

Improvement of the ventilation system by means of the use of antibacterial filters and increased air renewal frequency.



6. Digitalisation

100% digital registration and access control, cashless payments in all the catering outlets, an online sales service and minimisation of the use and exchange of physical deliverables during the event.



7. Contact traceability

Location of sales contacts through the Lead Retrieval system, which identifies and monitors them in the event of a positive case.



8. AI for capacity control

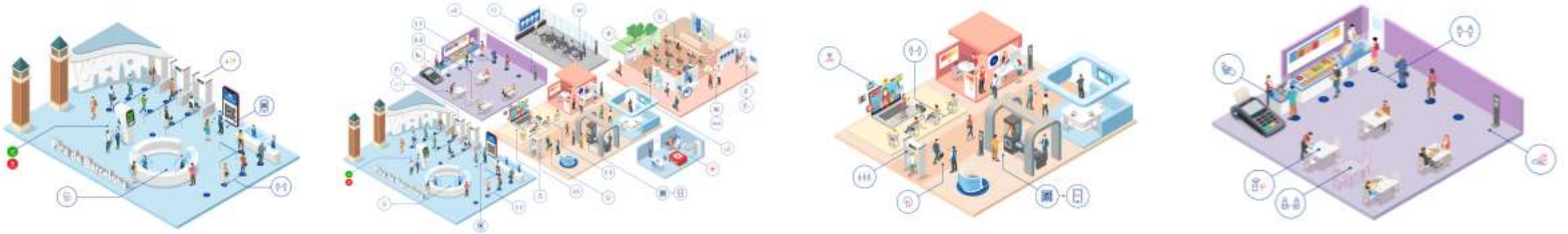
Cameras equipped with AI (Artificial Intelligence) to regulate the capacities and flows. Wi-Fi control of capacity distribution to ensure social distancing.

Details: <https://www.firabarcelona.com/en/safety-and-prevention-protocol-against-covid-19>





Protocol on Safety & Prevention against COVID-19



In the venue

- Redesign of the exhibition spaces to ensure distance – **each has 2.5 sqm space and 1.5m distance from each other**
- Traceability of contacts using Lead Retrieval
- Installation of screens at all information and customer service points.
- Provision of sanitisation points throughout the venue
- Reinforcement of first aid rooms
- Creation of isolation rooms for possible positive cases

Access to events

- Access via mobile phone
- Allocation of access hours
- Elimination of queues
- Temperature control and use of masks by attendees at access points

Stands and congress spaces

- Promotion of virtual activities
- Distance measures and capacity control at conferences and congresses
- Capacity limitation at the stands

Catering

- Reinforcement of hygienic-sanitary controls in all catering services
- Delivery of the food in individual units
- Installation of partitions at all catering points

Details: <https://www.firabarcelona.com/en/safety-and-prevention-protocol-against-covid-19>





Planned IoT Activities

As of March 2021

Mobile IoT Summit



Platinum Sponsor



Supporting Sponsors



27 June 2021 | [Hyatt Regency Barcelona Tower](#)

GSMA Innovation City



28 June – 1 July 2021 | Hall 4, Fira Gran Via

Highway to 5G



28 June – 1 July 2021 | Outdoor Area Between Hall 3 & 5,
Fira Gran Via

Conference Session & Partner Summit



IoT Sessions
29 June 2021 | Hall 8, Fira
Gran Via



Partner Summits
To be confirmed

Plus IoT Topic Tours, Technology Meetings (TBC) and Networking Receptions (TBC).

Contact: Eric Yu (eyu@gsma.com)

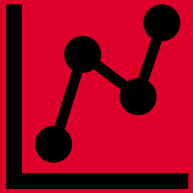
GSMA IoT Marketing Update

GSMA Intelligence: Enterprise in Focus survey and beyond

Sylwia Kechiche
Principal Analyst, IoT and Enterprise
GSMA Intelligence

Measuring the pulse of the industry

Enterprise in Focus



IoT deployments
and maturity



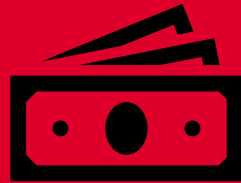
Purchasing and
Decision Making



IoT Technology



Understanding
success & benefits

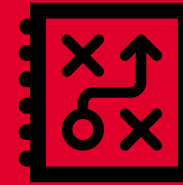


Budgets

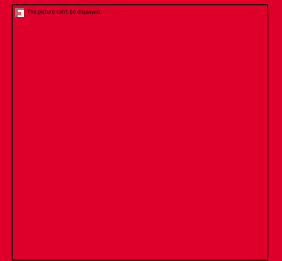


Security & Data
Analytics

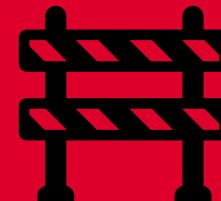
Operators in Focus



Enterprise offering



Vertical
Opportunities



Barriers



Go to market
strategy

Enterprises speak: IoT gets real

December 2020

© 2020 GSMA

IoT security for enterprises: make it work, make it easy

December 2020

© 2020 GSMA Association

INSIGHT SPOTLIGHT

In their quest to expand product portfolios beyond connectivity, operators are looking to IoT as a revenue driver. Covid-19 has highlighted the need for enterprises to embrace digital transformation – and 5G's improvements (in terms of lower latency, faster transmission speeds and increased network capacity) should open the door.

However, the IoT ecosystem is fragmented, multiple players are vying to claim a slice of the market and operators are not necessarily first-choice providers of IoT. We examine how operators can successfully monetise the opportunity ahead.

Analysis

Good news, bad news

The good news is that 63% of enterprises we surveyed have deployed IoT as part of a digital transformation initiative, up from 60% a year ago. Covid-19 has affected IoT plans: over the short term, we have seen projects cancelled, but Covid-19 will over the longer term escalate adoption of IoT, AI and 5G among other technologies and drive further digital transformation.

The bad news is that operators are not front of mind for enterprises when it comes to IoT; they are seen as niche providers.

It remains an open question whether enterprises' varied requirements, lack of confidence in operator capabilities to deliver on their go-to-market strategies are to blame.

5G to the rescue?

What operators offer – connectivity – is clearly in demand. Enterprises require coverage that spans regions and even the globe. Some 66% of enterprises we surveyed require national coverage for their IoT deployment, 39% municipal coverage (single region or city) and 14% international coverage (multiple countries). Added which features/capabilities are critical to IoT success.

Operator strategies for verticals in the 5G era

July 2020

© 2020 GSMA Association

Survey dashboard allows to dig deeper

Region:

Region

Asia Pacific
Europe & CIS
Latin America
Middle East & Africa
North America

Country

Argentina
Australia
Brazil
China
France
Germany
India
Indonesia
Japan
Mexico
Russia
South Africa
South Korea
Spain
Sweden
Turkey
United Kingdom
USA

Size:

Size of enterprise

1. Smaller (< 250 employees)
2. Larger (> 250 employees)

IoT maturity - time since deployment

1. IoT non user (Have not deployed)
2. Adopter (0-2 years)
3. Master (2-5 years)
4. Pro (5+ years)

[Extract the current view](#)
[Return to cover page](#)

Enterprise in Focus Survey Dashboard: State of the IoT Market

Surveys conducted in H2 2019 and H2 2020

Contents

IoT deployment status	(Country data) (Vertical data)	Tracking enterprise IoT adoption and future plans
Challenges	(Country data) (Vertical data)	Challenges enterprises face in deploying IoT solutions
Success measures	(Country data) (Vertical data)	What enterprises identify as the key measures of success for IoT adoption
Perceived impact	(Country data) (Vertical data)	Enterprises' attitudes towards IoT

Vertical:

Industry

Healthcare
Manufacturing: Automotive
Manufacturing: Consumer electron...
Manufacturing: Other
Public sector
Retail
Transportation and warehousing
Utilities

Size:

Size of enterprise

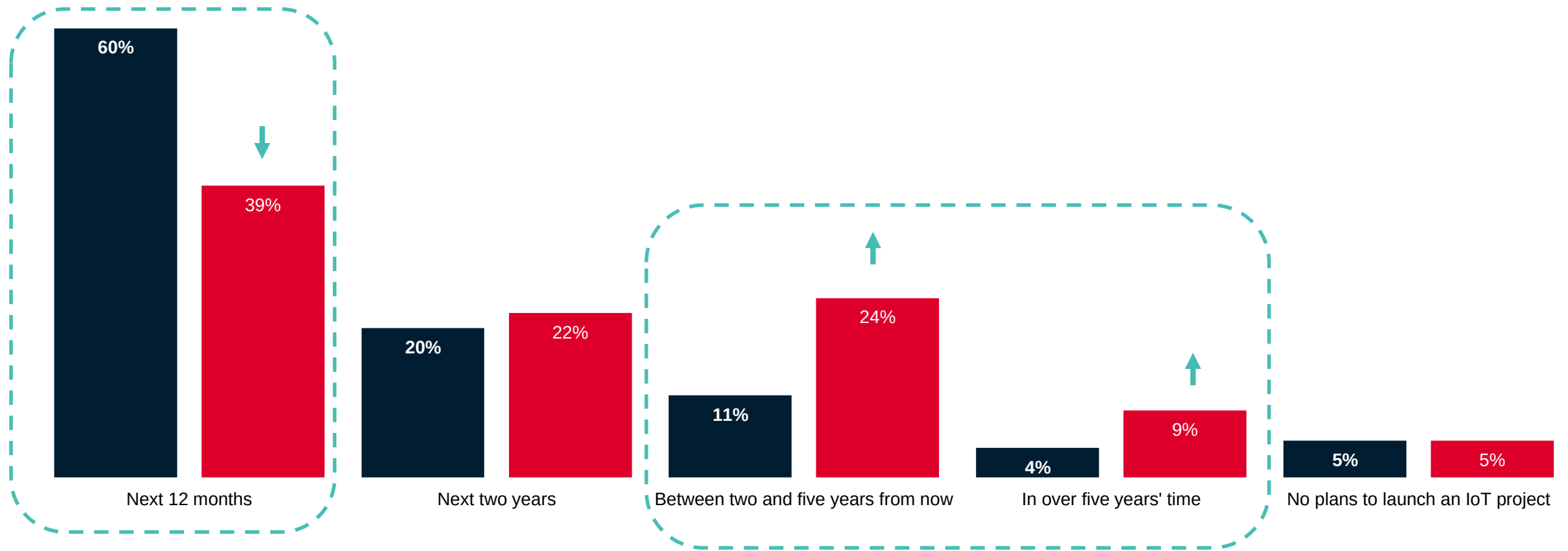
1. Smaller (< 250 employees)
2. Larger (> 250 employees)

IoT maturity - time since deployment

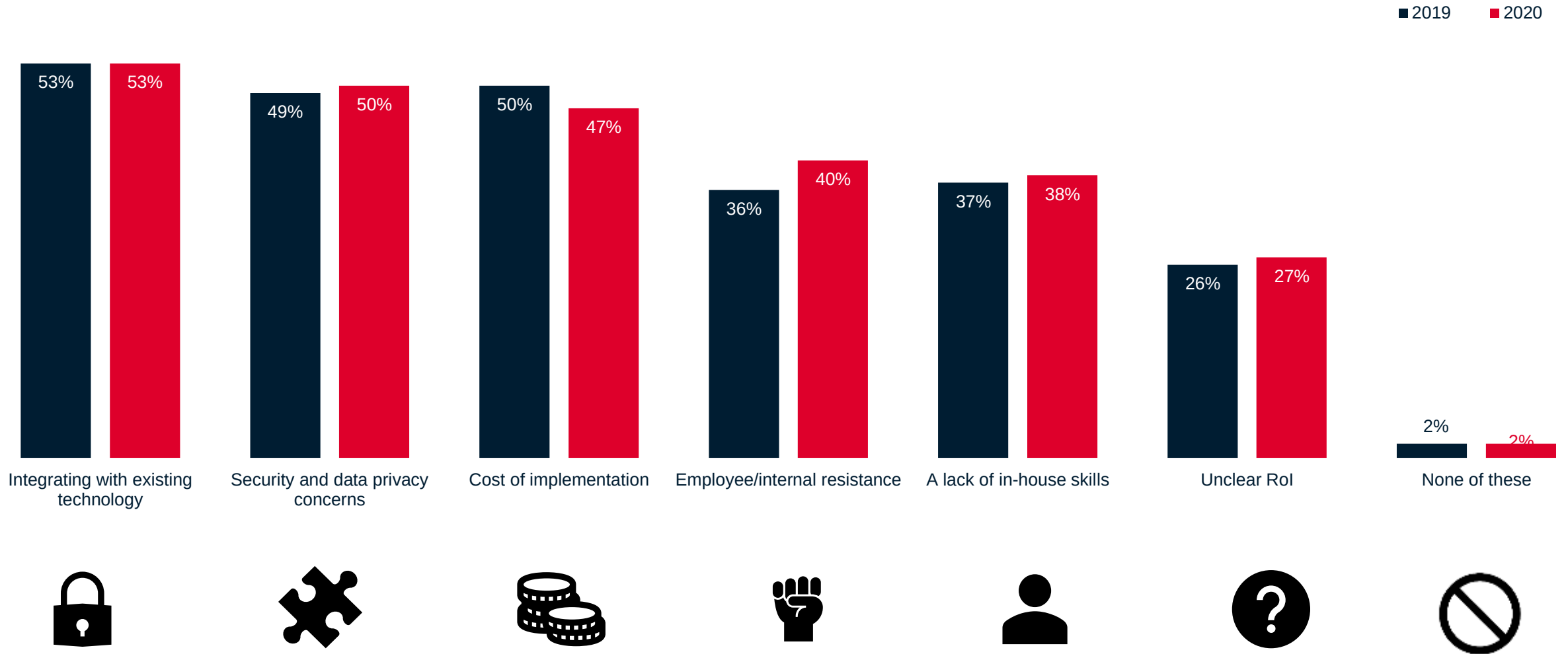
1. IoT non user (Have not deployed)
2. Adopter (0-2 years)
3. Master (2-5 years)
4. Pro (5+ years)

Covid-19 puts IoT projects on hold

■ 2019 ■ 2020



Challenges remain broadly the same



the emphasis shifts away from cost saving



Revenue generation

68%

68%



Cost saving

65%

69%



Regulatory compliance

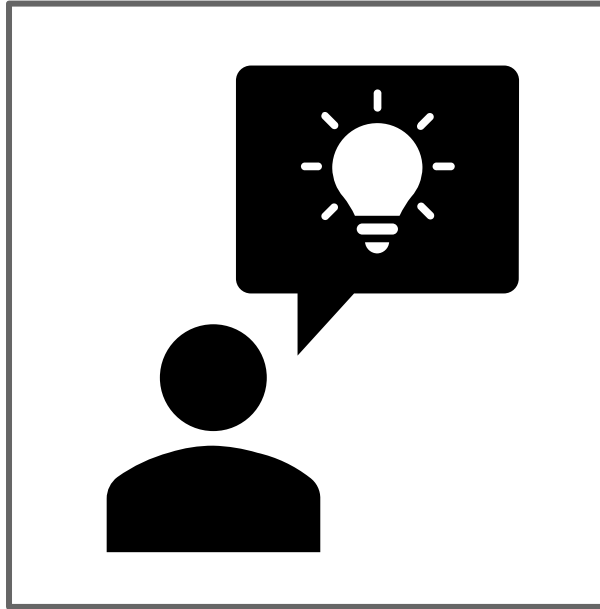
52%

51%

What's next?



Questions?



Hypothesis to test?



Reach out



THANK YOU!

Sylwia Kechiche
Principal Analyst
skechiche@gsma.com

Contact us at:
info@gsmaintelligence.com

Latest Activities & Resources



Topic	Attendance/Registration	View On-Demand
Transformative IoT Beyond Connectivity , The Power of Partnership	162 / 469 (34.5%)	Here
5G IoT for Manufacturing – Transforming Industry with Mobile	465 / 987 (47%)	Here
How Can C-V2X Create an Environment that Improves Quality of Life for Everyone?	250 / 677 (37%)	Here
Utilising Mobile Connectivity for Drones Remote Identification	154 / 379 (40.6%)	Here
Leveraging C-V2X and the Power of Partnership to Create Safer Roads	153 / 462 (33.1%)	Here
5G Private & Dedicated Networks for Industry 4.0	345 / 771 (44.7%)	Here
Interview with Zenzic – Connected and Automated Mobility	N/A	Here
Delivering 5G Quality of Service (QoS) for Connected and Automated Driving	119 / 328 (36.3%)	Here
Reaching New Heights – The Future Role of Mobile Networks in Aviation and Drones	113 / 440 (25.7%)	Here



The benefits of partnership between the aviation and mobile industries are therefore immeasurable, which is why the ACJA (Aerial Connectivity Joint Activity) was established in 2020 with the goal of building a bridge between these sectors, guiding stakeholders about the relevant standards and ensuring alignment.

This IoT WebTalk will look at the four main works streams within the ACJA, their significant achievements so far, and their planned activities going forward which will shape the industries we work in.

REGISTER HERE



Boris Resnick
Deputy Technical Director,
Aerospace Systems, GLONASS Union



Stefano Faccin
Director, Technical Standards
Qualcomm



Thomas Neubauer
VP, Business Development
TEOCO



Gerry Libunao
Distinguished Member of Technical
Staff, Verizon



Peter Musgrove
Lead Member of Technical Staff
AT&T



Thomas Eder
Senior Engineering Manager
Nokia Digital Automation



Barbara Pareglio
Senior Director, IoT Technology
GSMA



Christopher T. Kucera
Co-Founder & Head of Strategic
Partnerships, OneSky



Eric T. Ringer
Co-Founder & Director of Aviation
Technology, Skyward, a Verizon
Company

和合共生

CONNECTED
IMPACT

#MWC21

2021年2月23至25日
23 - 25 February 2021

Highlight – 25,000 attendees from 114 countries



IoT Summit Sessions – On-Demand

5G IoT and Private Networks for Industry 4.0



In alphabetical order



Transforming Automotive and Mobility with 5G



In alphabetical order



Future Opportunities for Mobile-Enabled Drones



In alphabetical order



View On-Demand on My MWCS (prior registration with the code **FPVQBNS27E** on <https://register.mwcshanghai.com/>):
<https://mymwcs.gotin.online/home/live?pageType=liveStream&agendaId=mwc21-session-Some%28591%29>



GSMA IoT Resources (Dec 20 – Mar 21)

GSMA INTERNET OF THINGS PROGRAMME 29

Title	Technology Area	Asset Type	Link
On-Demand: 5G IoT and Private Networks for Industry 4.0 at MWC Shanghai 2021 (Mar 2021)	Manufacturing	Webinar	Here
5G Convergence with Vehicle OTA Updates and Vehicle Data Logging (Feb 2021)	Automotive	Case Study	Here
CES 2021 Highlights: Top three drone stories from this year's virtual conference (Feb 2021)	Aviation	Blog	Here
IoT WebTalk Q&A: Reaching New Heights – The Future Role of Mobile Networks in Aviation and Drones (Feb 2021)	Aviation	Q&A	Here
Infographic: The Connected Vehicle Opportunity (Jan 2021)	Automotive	Infographic	Here
On-Demand IoT WebTalk: Reaching New Heights – The Future Role of Mobile Networks in Aviation and Drones	Aviation	Webinar	Here
GSMA Intelligence: IoT Security for Enterprises: Make It Work, Make It Easy (Dec 2020)	IoT Security	Whitepaper	Here

Upcoming Resources

Title	Technology Area	Asset Type	Expected Publication Date
Educational mini-case study video around innovative automotive or mobility solution (similar to 5G Convergence with Vehicle OTA...)	Automotive	Case Study	Mid-March
Benefit Analysis paper for Aviation and Drones	Aviation	Whitepaper	End of March
5G IoT Private Networks for Manufacturing Case Studies x 3	Manufacturing	Case Study	End of March

GSMA IoT Events

GSMA IoT Resource Library

GSMA IoT Industry News



The GSMA has compiled a useful reference of common Aviation and Mobile terms, including acronyms. This list will be updated on an ongoing basis, and we invite you to share with us for any terms to be added: drones@gsma.com (Marketing Lead: Nicola Gordon ngordon@gsma.com)

Find out more: <https://www.gsma.com/iot/gsma-glossary-of-aviation-and-mobile-terms/>



IoT Industry Resource Libraries

GSMA INTERNET OF THINGS PROGRAMME 31

Mobile IoT

5G IoT for Manufacturing

Automotive & Mobility

Connectivity for Aviation



<https://www.gsma.com/iot/mobile-iot-resources/>

Submit Your Contents



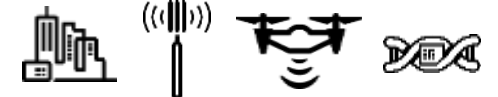
<https://www.gsma.com/iot/manufacturing/resources/>

Submit Your Contents



<https://www.gsma.com/iot/automotive-mobility-resources/>

Submit Your Contents



<https://www.gsma.com/iot/connectivity-for-aviation-resources/>

Submit Your Contents



THANK YOU!

GSMA IoT

<https://www.gsma.com/iot/>

GSMA Twitter

<https://twitter.com/GSMA>

GSMA IoT on LinkedIn

<http://gsma.at/iot>

GSMA IoT YouTube Playlist

<https://gsma.at/iotplaylist>

GSMA IoT Newsletter

<https://www.gsma.com/iot/newsletter/>

IoT Marketing Group Meeting Archive

<https://www.gsma.com/iot/iot-marketing-group/meetings/>