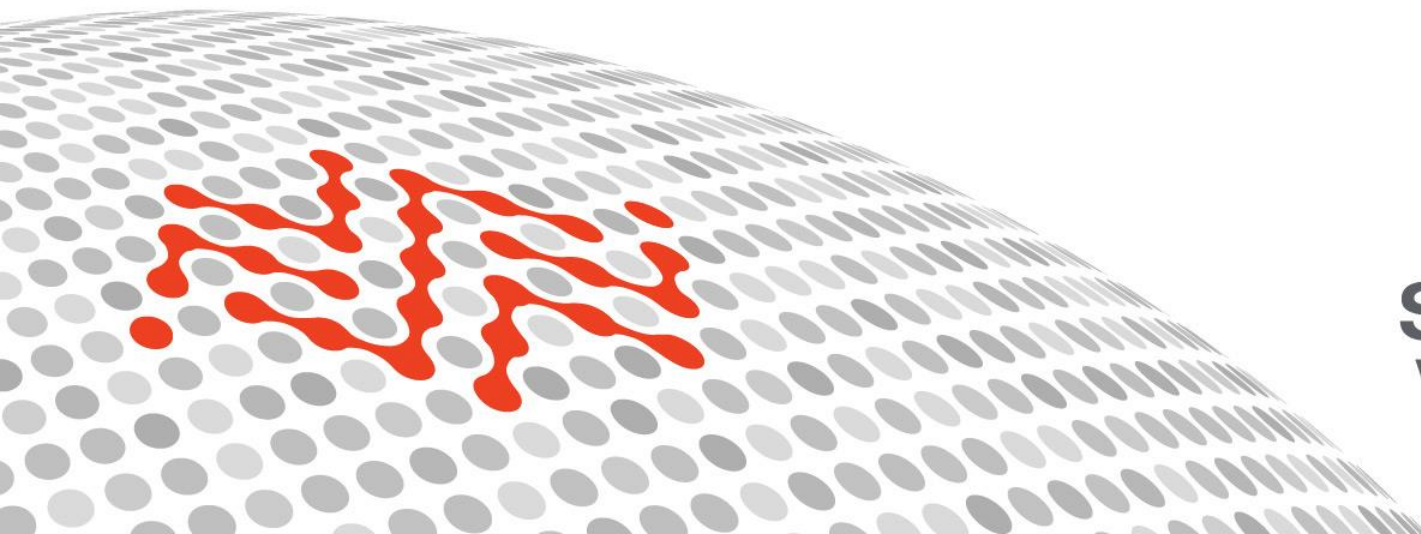
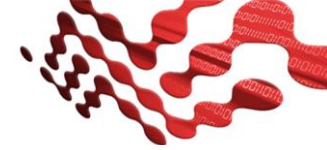


The M2M Opportunities

Olivier Pauzet | VP Marketing & Market Strategy





The M2M Opportunity

Power of connected devices and services is easy to understand

**Application concepts
are (somewhat) obvious**

Improved healthcare,
more responsive service,
better safety and security...

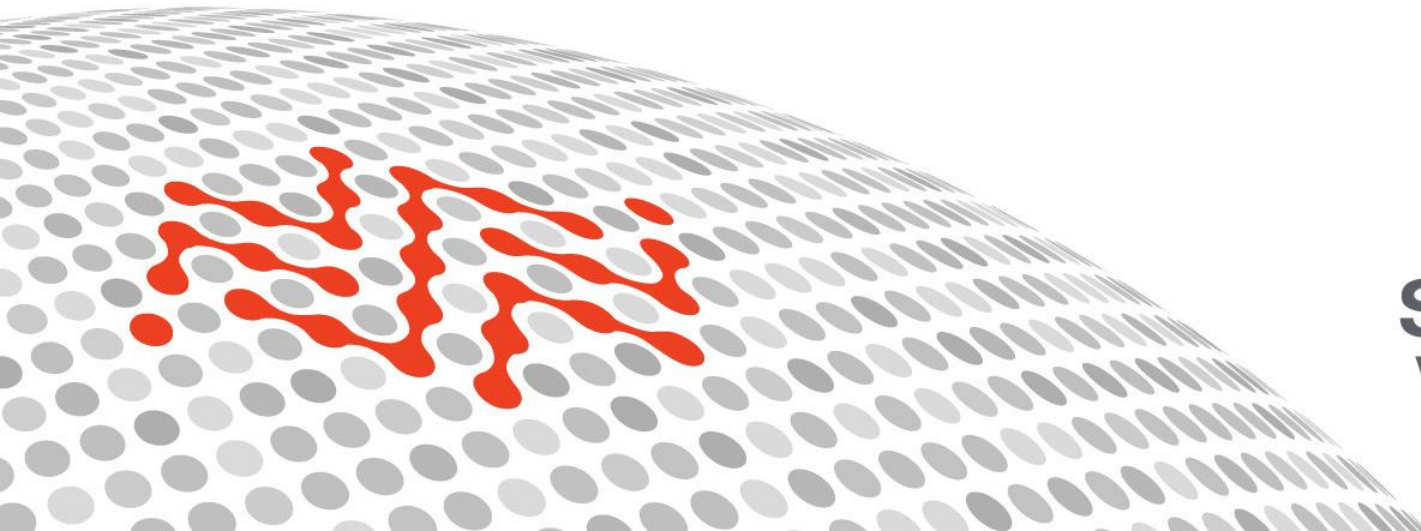
ROI is compelling

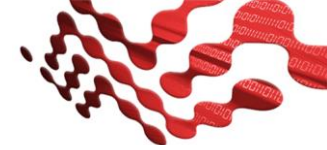
Better inventory management,
higher service revenue and lower
costs, fuel savings and higher
asset utilization...

Market potential is huge

Billions of connected devices...

The Market Opportunities





Market Segmentation

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Automotive & Transport

Automotive

Automotive OEM

Truck OEM

Transportation

UBI & Finance

Toll collect

Fleet Management

Transit

Goods tracking

Industrial

Energy

Smart Metering

Smart Grid

Industrial & Infrastructure

Public Lighting

Pipeline Management

Asset Management

Enterprise

Field Service

Rugged Handheld

Mobile Computing

Public Safety

Sales & Payment

POS

Vending

Digital Signage

Networking

Network

Residential

Home

Home Automation

Home Gateway

CCTV

Alarm

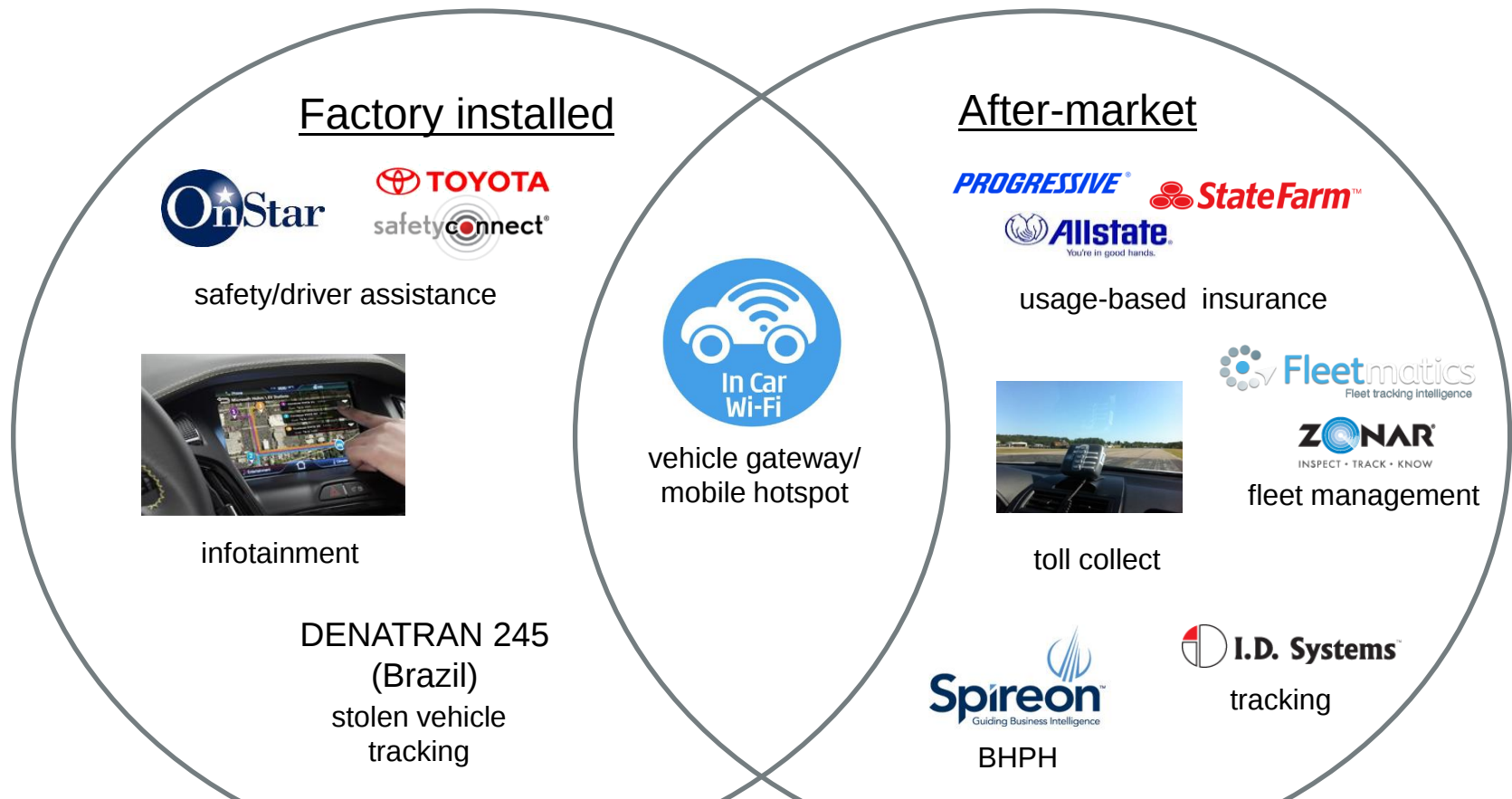
Healthcare

Quantified Self

Patient Monitoring

Automotive & Transport

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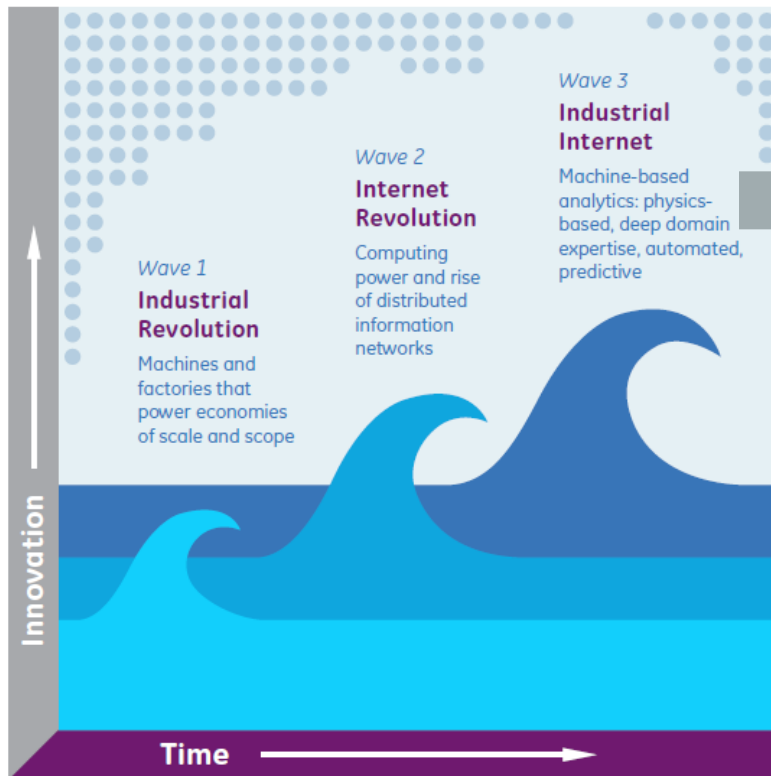


The largest M2M Opportunity

- ~10% Penetration of embedded connectivity in new vehicles in 2013
- >50% of new cars to have embedded connectivity by 2020



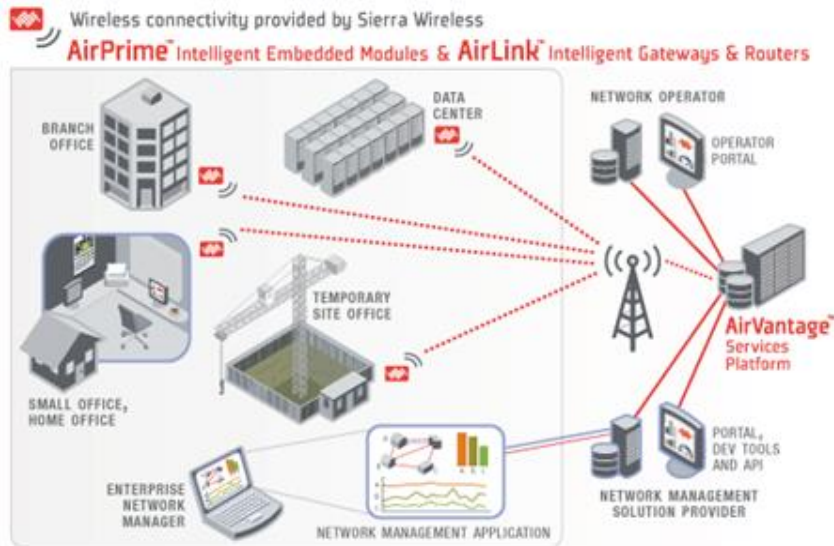
Figure 2. Rise of the Industrial Internet



Typical segments

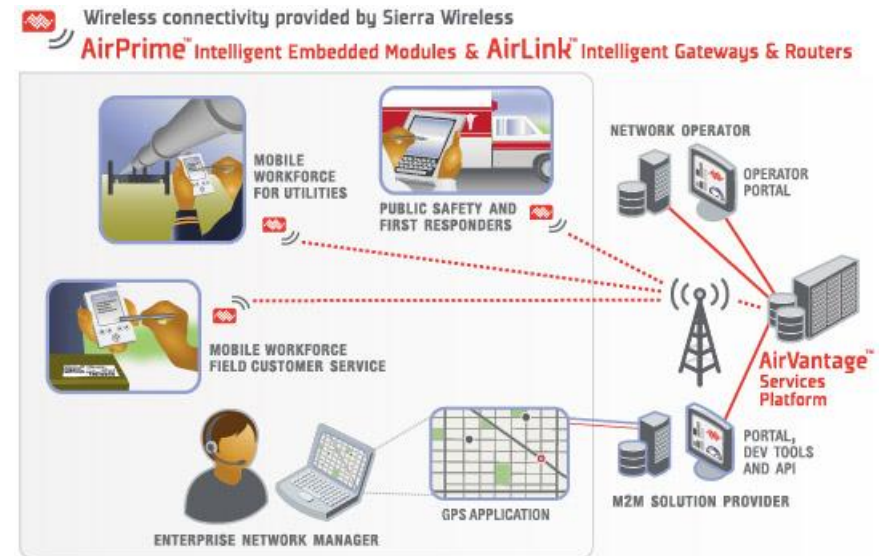
- Energy / Utilities – industrial meters, valves, pumps, water / waste, generators, smart grid, field assets
- Oil & Gas – exploration, pipelines, refineries, gas stations, heavy equipment
- Infrastructure / Equipment – traffic, rail, lighting,
- Agriculture – smart farms
- Buildings – HVAC, environment monitoring
- Asset management
- Construction
- Mining

A massive opportunity: energy management driving the volume and new applications picking up



Enterprise Networking

- Optimize branch office service
- Data, financial data center
- Broadband wireless back up



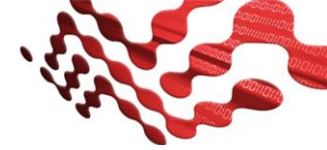
Professional Handhelds

- Logistic terminals
- Sales & Payment terminals
- Mobile computing

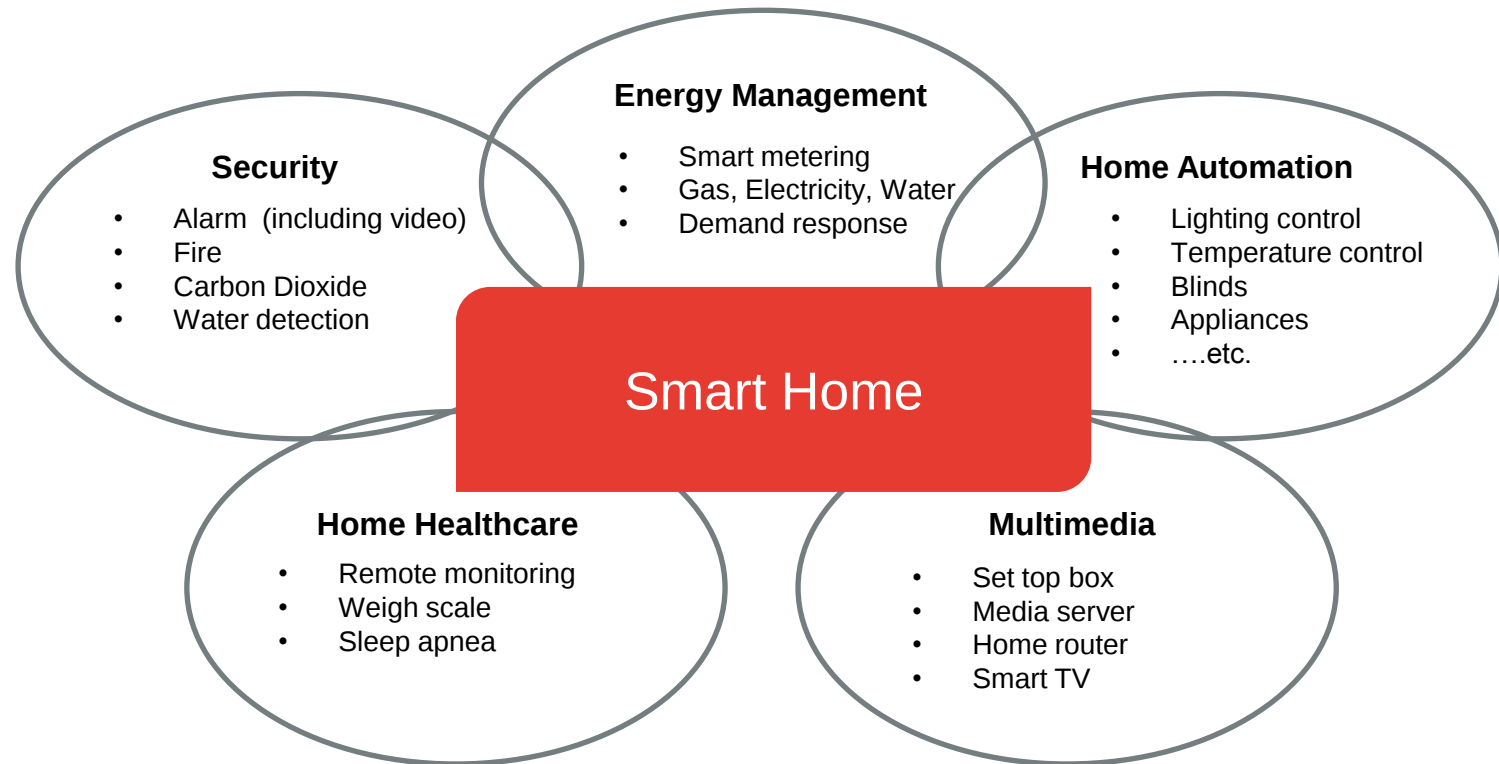
Public Safety & Utilities

- Deployment and operation coordination
- Personal assistance and location

Enterprises are looking for seamless and robust connectivity driving demand for M2M solutions



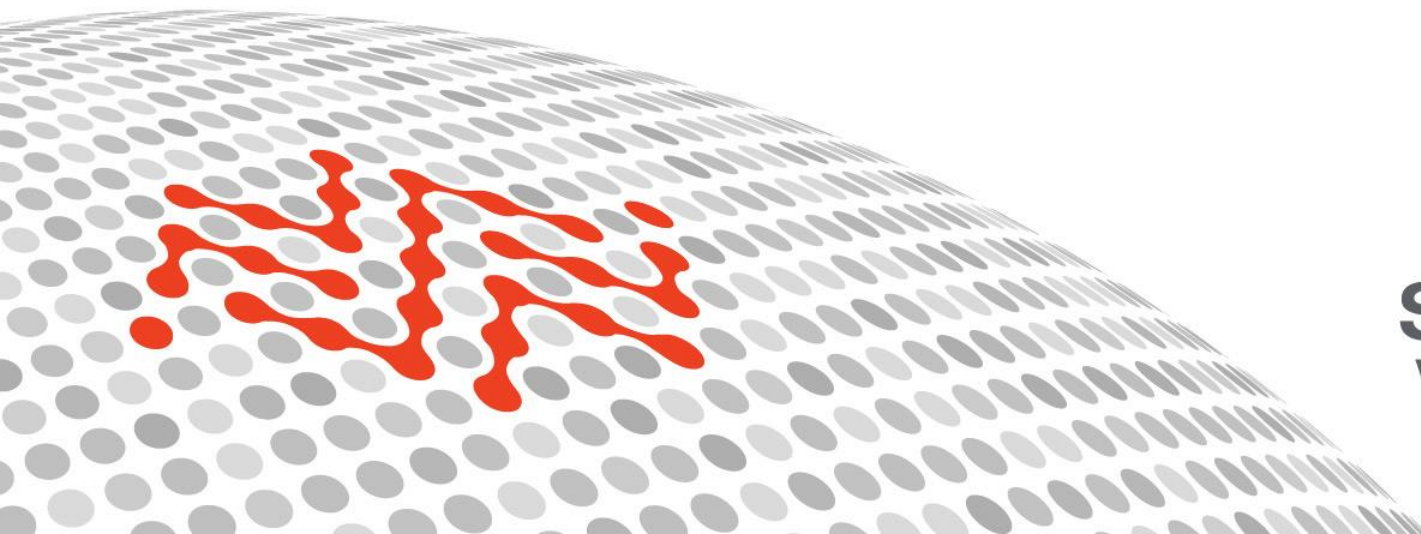
Convergence of home security, home automation, energy management, home healthcare and multimedia



Market potential is significant.

Convergence is currently driving ecosystem changes with new entrants.

The LTE Opportunity

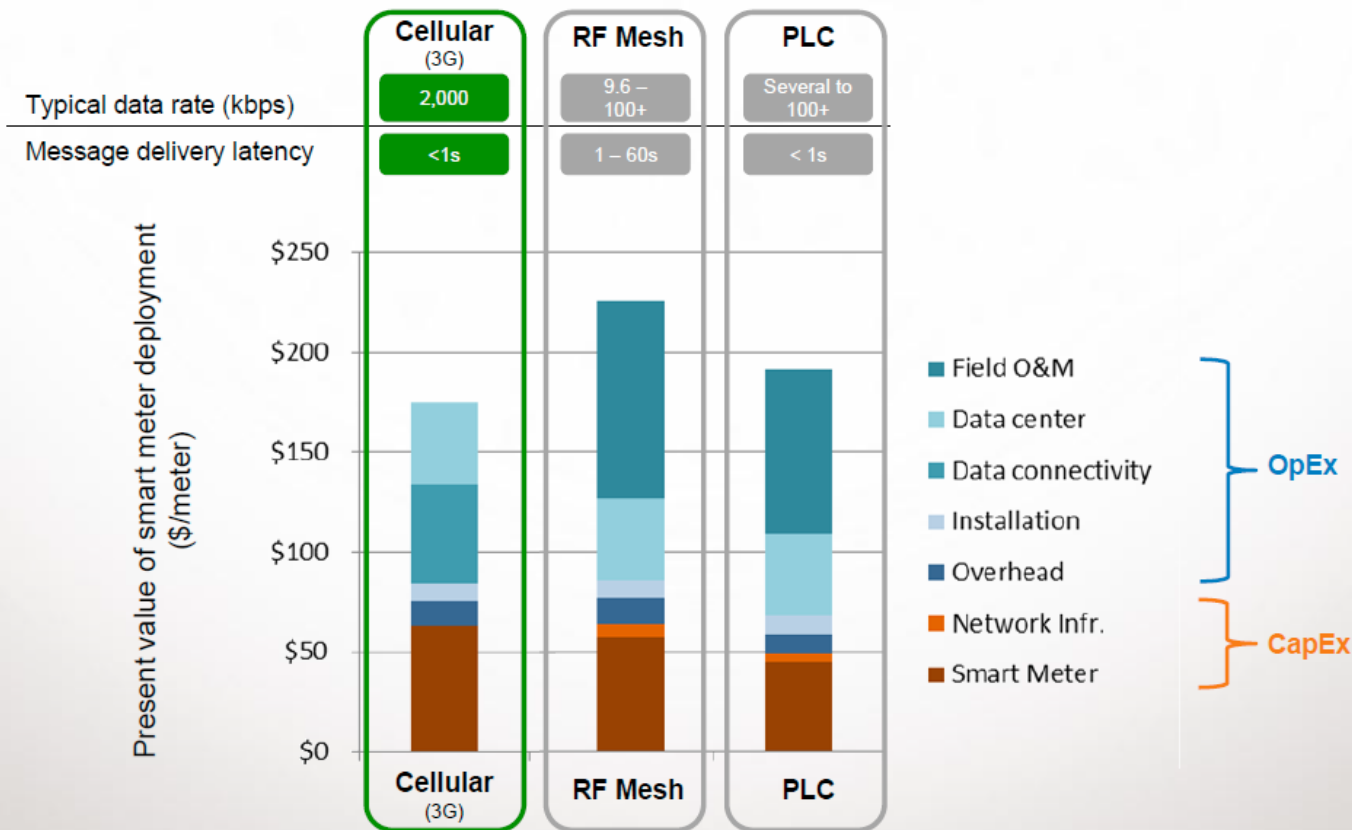




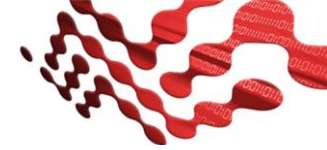
Benefits of Cellular

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Simple, Scalable, Secure



¹ Source: Qualcomm economic model for a typical smart meter deployment.



LTE Benefits

4G LTE is becoming the technology of choice for M2M deployments.

**Global Standard,
Long Term**

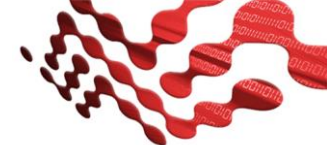
- CDMA and GSM are converging with LTE
- All Standard IP network
- 2G/3G Spectrum is being re-farmed to enable long term LTE deployments
- Emergence of Public/Private LTE networks

**Bandwidth
+ Low Latency
+ Quality of Service**

- High bandwidth, low-cost/MB = new applications for the Enterprise
- Low Latency + QoS = answer the need of critical applications

**Long-range,
Low power**

- LTE - M = more cellular in IoT



4G in M2M is happening

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Automotive



- The Connected Car
- Infotainment
- Internet Access

Smart home



- Smart Home
- Energy Management
- Alarm / Security

Digital Advertising



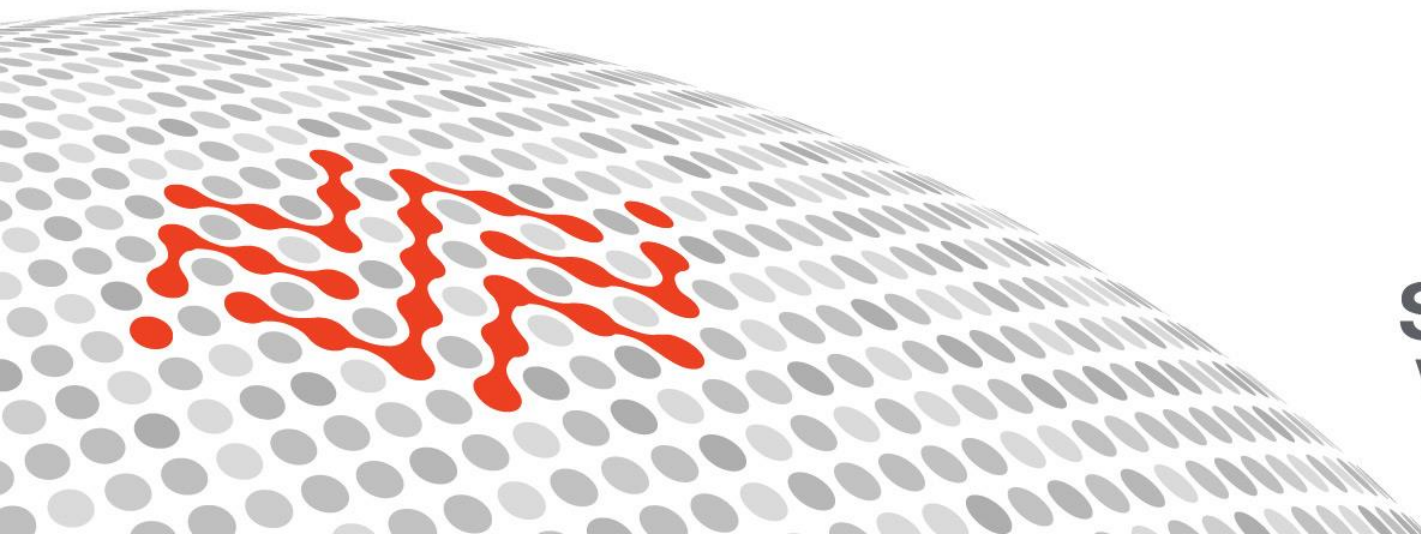
- Mobility
- Digital Signage
- Remote Updates and Maintenance

Connected Health



- Remote monitoring
- Patient education
- Diagnostics

Thank You



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