

TALKING HEADS ▶

Wylless sees M2M market shifting as clients demand more complex services

SECURITY ISSUE:

'Always-on' connectivity is the new burglar deterrent

+

A business case for security-enabled communication

SERVICE PROVIDER CASE STUDY

P2P fibre helps Stream to boost bandwidth 'tenfold' on demand

EXCLUSIVE OPERATOR INTERVIEW

What can Deutsche Telekom do with its 'Developer Garden'?

SIM / MIM MANAGEMENT

Sink or SIM – We see how current models will have to change!

▼ AUTOMOTIVE M2M

Slow down! Insurers use in-car video cameras to check driver behaviour

ALSO INSIDE!

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- The Contract Hot List
- IBM and Vodafone push the Smarter Home initiative
- A Secure Smart Grid Platform's coming
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by **Telit** m2m experts

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TALKING HEADS



14
Security



20
SIM MANAGEMENT



26

EXCLUSIVE:
OPERATOR
INTERVIEW



Cover Sponsor: Wyless is a leading global M2M managed services provider. The Wyless M2M platform, delivered in partnership with the world's largest mobile network operators,

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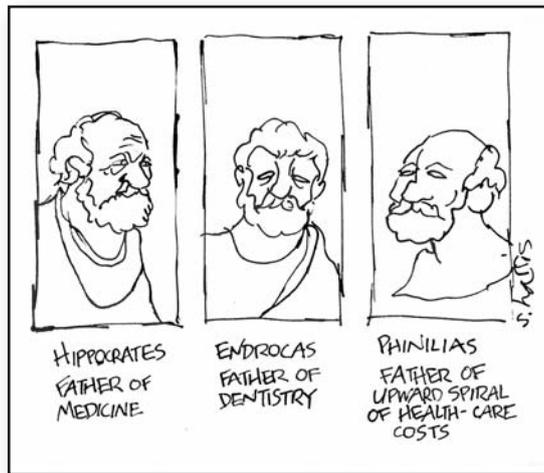
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CONTENTS	3
COMMENT – by the Editor, Jeremy Cowan M2M Now – Time for some fresh thinking	4
MARKET NEWS The Cloud may boost operator M2M profits fivefold	5
COMPANY NEWS Telefónica Digital and La Caixa invest €3m in addFleet's intelligent transport skills	6
PRODUCT NEWS Kamstrup unveils secure smart grid platform; Lantronix and Withering launches	7
CONTRACT NEWS Elektrilevi selects Ericsson for smart metering in Estonia; plus GCT, Cadec and NT	8
THE CONTRACT HOT LIST & CONTRACT NEWS Contract Listings; plus inthinc, ORBCOMM, Chrysler and Sprint	9
PEOPLE NEWS Lucero comes to IHS; Larsson crosses the pond; and INSIDE Secure appoints Garnier	10
TALKING HEADS Steve Priestley, Wyless' EMEA MD, sees the market shift as clients demand more complex services	11
SECURITY 'Always-on' connectivity is the new burglar deterrent says GSMA's Lattibaudiere	14
SECURITY Stephen Bryant makes the business case for security-enabled communication	17
EXPERT OPINION: MIMS Benoit Jouffrey offers an insider's view of M2M & MIM™ management	18
SIM MANAGEMENT Steve Rogerson talks to many in the market who foresee big changes for SIMs	20
EXCLUSIVE: OPERATOR INTERVIEW 'Developer Garden' aims to be DT's ideas catalyst for M2M developers worldwide	26
NETWORK CASE STUDY Point-to-point fibre enables Stream to boost bandwidth 'at a moment's notice'	28
M2M NOW'S CEO GUIDE TO MOBILECON™ 2012 Our 12-page preview of CTIA's 'new' event in San Diego	29
WELCOME TO MOBILECON 2012 & PREVIEW CONTENTS There's a new engine under the hood in San Diego	31
SPOTLIGHT INTERVIEW ILS Technology chief, Fred Yentz, looks for simplicity, security and speed to market	32
EXPERT OPINION: BANDWIDTH Thomas Seiler, CEO of u-blox, describes their plans for a high bandwidth future	36
MobileCON™ MAKEOVER What's in a name?, asks Steve Rogerson	39
EVENT DIARY What's on! Events worldwide in M2M, connected devices and smart utilities	41
BACK PAGE Oliver Philippou asks why more insurers aren't using cameras to monitor drivers	42



M2M - Time for some fresh thinking

If you have time take a look soon at the work of Strand Consult (www.strandconsult.dk), a Copenhagen-based firm that seldom swims with the tide (see what they say about the iPhone's value to mobile operators!). Strand recently wrote: "Senior leaders in mobile operators don't know much about the digital world. We don't blame them. They came of age in age in the early 1980s before email, the PC, and mobile phones. The average age of a CEO in industry is 50. The chairman is ten years older. Naturally, they know the classic telecommunication business – fixed line. And (...) the balance sheet." But Strand went on to question the marketing mix adopted by telcos befuddled by Facebook Likes and Twitter followers, and failing to ensure that such campaigns increased loyalty or built profitability.



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Jeremy Cowan

It strikes me that fresh thinking is needed in M2M, too. I've been impressed recently by the vision of one incumbent telco, and I don't say that very often. It's created a Digital division backed with hard cash and strategic plans, while some network operators settle for a shiny logo and new business cards all round. Step forward **Telefónica Digital**. As we report on page 6, Telefónica Digital and **La Caixa** with their shared interest in smart cities have invested €3 million in **addFleet**, a company developing more sustainable and efficient transport networks. It has created a new cloud-based mobility system that uses M2M technology and mobile devices to connect vehicles to taxi despatch centres and to users. (The importance of the Cloud is a subject we will discuss in these pages shortly).

In this issue you will also find SIM and MIM™ providers giving some serious thought to their future (see **Sink or SIM** on pages 20-23), an Exclusive interview with **Deutsche Telekom's** top man in M2M (pages 26-27), and an entire supplement on the **CTIA's** San Diego event, MobileCON.

Finally, keep an eye on our website (www.m2mnow.biz) for news of a new telehealth event we are hosting in Las Vegas on May 20, 2013, the day before **International CTIA Wireless**. Organised in co-operation with CTIA, **Money Talks – eHealth** will explore the business opportunities and successful models underpinning curative and preventive M2M healthcare applications. Happily, this month I've also discovered the genius of Sidney Harris, a cartoonist in **Playboy**, **The New Yorker** and now, I'm proud to say, **M2M Now** magazine. His comment on healthcare costs (above) just had to be included. We hope you enjoy all of this issue. ☺

J Cowan

Jeremy Cowan, Editor

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Cloud may boost operator M2M profits five-fold as market hits \$373bn in 2020



Macario Namie

Research funded by the USA's Jasper Wireless, the connected devices platform provider for M2M, and conducted by UK-based Machina Research, suggests that mobile network operators (MNOs) implementing a cloud-based M2M services management platform could see a 500% profit increase by 2020.

Machina Research predicts that there will be 2.1 billion cellular machine-to-machine (M2M) connections worldwide by 2020 and that the addressable market for mobile operators in M2M will total US\$373 billion in 2020.

"The majority of 'value' in the M2M market lies not in undifferentiated connectivity, but in moving up the value-stack to capture a bigger share of the M2M opportunity. Many of the world's leading mobile operators have made significant investments to that end, including establishing M2M competence centres, platform capabilities and partnering initiatives," said Jim Morrish of Machina Research.

The first step when adding more value is the provision of a value-added connectivity support capability, allowing MNOs to generate more revenue per connection and to focus on generating application revenue directly from customers.

The research results are summarised in a White Paper, now available from Jasper Wireless. For this, Machina Research undertook a detailed business modelling exercise to quantify the potential benefits of adopting a cloud-based M2M platform solution. It found that adopting such a platform could have a substantial impact on an MNO's M2M revenue.



Jim Morrish

As Jim noted: "The effect of adopting a cloud-based M2M platform is to increase cumulative profits from M2M between now and 2020 five-fold in comparison with a scenario where the same mobile operator does not adopt any form of platform capability." The main sources of benefit that they identified include: additional local client wins, additional regional client wins, ARPU (average revenue per user) uplift, and cost reduction.

"Jasper Wireless has been at the forefront of prescribing a purpose-built and cloud-based platform for profitably delivering M2M services," added Macario Namie, vice president of Marketing at Jasper Wireless. "We are pleased to see that the business modelling exercise validates the benefits that such an offering can provide."

M2M by Numbers

3

The investment (in millions of Euros) by Telefónica Digital and 'La Caixa' in addFleet's intelligent urban transport business.

73

The length in miles of the M2M-enabled 'Connecting Light' art installation along the Roman-built Hadrian's Wall, organised for the Cultural Olympiad (*pictured below*).

95

The percentage of new vehicles in Western Europe that will be fitted with M2M connectivity by 2019.

100

The dollar discount negotiated exclusively by M2M Now for readers who attend the 'Telematics for Fleet Management USA' event in November*

200m

The annual US dollar revenues forecast by IMS Research for smart metering backhaul infrastructure.

* For full details of these and other News stories go to: www.m2mnow.biz



Family locator services to reach 70m users in Europe and North America by 2016, says report



According to a new research report from analyst firm Berg Insight, the number of active users of family locator services in Europe and North America is expected to grow from 16 million in 2011 to 70 million in 2016.

low cost apps that can turn a smartphone into a location device that enable monitoring of family members such as children or elderly.

Growing adoption of smartphones has also enabled rapid uptake of business-oriented location apps, such as workforce management services that can improve operational efficiency in organisations with mobile employees.

Another market for dedicated people tracking devices include systems that assist seniors living at home or in care homes. These systems are usually called telecare systems or social alarms in Europe and Personal Emergency Response Systems (PERS) in the US. Berg Insight estimates that there are already 5 million users of the first generation social alarms connected to wireline networks in Europe and North America.

Family locator services represent the largest segment (by number of users) for people-monitoring and safety solutions based on either GPS-enabled smartphones or dedicated cellular/GPS location devices. Many parents are now discovering free and



Telefónica Digital and 'La Caixa' invest €3m in addFleet's intelligent urban transport skills



Telefónica Digital and 'La Caixa' have announced a joint investment of EUR3 million in addFleet, a company specialising in intelligent transport systems. The investment is intended to promote the commercialisation of the company's products worldwide.

addFleet is a young company headed by Bartolomé Olivares and Daniel Cabrera, and accelerated by the Inspirit group. It aims to develop more sustainable and efficient transportation networks. addFleet has developed a new cloud computing-based mobility system that uses M2M technology and mobile devices to connect vehicles to

taxi despatch centres and to users.

Taxi despatchers are currently managed by analogue radio systems or servers at the dispatch centres that connect to terminals in each vehicle. The main disadvantage of these systems is that they require a large investment and do not allow direct communication between the despatcher, the vehicle and the user.

addFleet's technology reportedly offers several advantages for reservation centres as well as for taxi operators and users. For the despatch centres, there is a significant cost reduction because the service does not

require an initial investment in servers, since the solution is cloud-based and the technology does not require installation and is self-configuring. The despatch centres pay a fee for each registered vehicle and a fee every time a service is handled.

Taxi drivers will find that the solution does not require the installation of costly technology and they only pay a small fee every time they pick up a fare using the application. They simply download the app to a smartphone, which then allows them to connect to the despatch centre via M2M technology and to determine the location of the customers closest to their current location.

Will eCall drive rapid market growth in automotive M2M communications?



IMS Research, recently acquired by IHS Inc., forecasts that unit sales of connected vehicles in Western Europe will grow to 15 million units by 2019. This equates to a fitment rate in new vehicles of more than 95%. So says a new IMS report on the automotive telematics market.

eCall is a proposal to enact legislation mandating the fitment of a crash-proof embedded emergency calling system in all new cars sold within the European Union. The basic system calls for a dormant 'cell phone' to be fitted in the vehicle that will

call the emergency services if the car is involved in an accident.

The system will place a voice call and send a minimum data set to the local public safety answering point (PSAP). Officers there can then speak with the occupants to find out if emergency response is required; or, in instances where the occupants are unable to respond, use the minimum set of data to dispatch emergency responders.

Most of the media coverage on eCall focuses on when it will be legislated (2015)

and how much it will cost the automotive industry, but what some fail to realise, says the report's author, is the fact that this system is going to be a great gateway to a host of new business opportunities for the industry and a host of great new services for the customer. While, in its most basic iteration, the eCall box is purely an emergency calling system, it is actually a catalyst for the industry to offer more advanced connected services in new vehicles.

NEWS IN BRIEF | NEWS IN BRIEF

GreenRoad partners with GPS Insight for advanced fleet tracking

GreenRoad, a driver performance management system provider, and GPS Insight, a fleet GPS tracking vendor, report that GreenRoad will offer advanced fleet tracking capability, provided by GPS Insight. GreenRoad Advanced Tracking will be available in the UK, USA and Canada by the end of the year.

"GreenRoad delivers the best drivers on the road — safe, fuel-efficient and green. As we've collected feedback about what more we can offer, we've consistently heard requests for integrated, advanced GPS tracking. The comprehensiveness, flexibility, and effectiveness of the GPS Insight service

are truly impressive. Now, with the GPS Insight partnership, we can offer the tools to also create the most efficient fleets on the road. It is a powerful combination," said Jim Heeger, chief executive of GreenRoad.

IBM and Vodafone advance smarter home initiative

IBM and Vodafone are to combine mobile communications and cloud computing for the remote management of 'smart home' appliances. Vodafone and IBM recently demonstrated the mobile management of a washing machine and other smart home devices connected by Vodafone's Global M2M Platform running on IBM's new SmartCloud Service Delivery Platform. M2M technology connects home appliances wirelessly to the internet, enabling them to

feed data back to the service provider or manufacturer to achieve a better customer experience through new functionality and enhanced services. IBM and Vodafone anticipate that this initiative could allow consumers to use their smartphones for a variety of remote activities including viewing their home's utility consumption; controlling security, heating and lighting systems; and activating home appliances such as washing machines





Kamstrup to unveil new secure smart grid platform



Kamstrup of Denmark will formally launch its OMNIA Suite smart grid platform at October's Metering Europe event in Amsterdam. It encompasses network communication, meter data management, smart grid applications and smart meters.

The system is claimed by the company to be "the most smart grid-ready end-to-end solution for utilities with an unprecedented strong focus on openness", security and meter reading performance. The ambition is to present the most innovative and

capable tool for grid optimisation.

Kamstrup's division director, Lars Bo Kristensen says, "We now present a fully matured smart grid system based on proven wireless technology, open standards and the latest security technologies. We know that data quality and data frequency are the most basic prerequisites for a well-functioning smart grid.

"This is why we have been focusing especially on a stable, high performing system. Our previous projects confirm that wireless technology provides an extremely high success rate on meter readings without any conditions in small letters regarding noisy environments. This is why

we continue with wireless technology in the OMNIA system: It simply works."

Kristensen adds: "Security is becoming a still more acute topic as smart meters are being distributed in homes worldwide. A smart grid system must present convincing answers to the security question and take everything from malicious attacks to natural disasters into consideration. The OMNIA system has, therefore, been designed with a defence-in-depth strategy towards minimising the impact of a single breach."



Telefónica and Arduino launch M2M connected device with remote management to assist IoT

Arduino and global network operator, Telefónica are presenting a new version of the Arduino GSM/GPRS Shield. The project has added a GPRS/GSM connection to a free hardware motherboard, creating a low-cost device connected through Telefónica's M2M technology and offering a range of possibilities for simple and cost-effective advances in the internet of things (IoT).

Arduino is an open source electronics prototyping platform based on flexible, easy-to-use hardware and software. It is intended for artists, designers, hobbyists, and anyone interested in creating

interactive objects or environments. Arduino can sense the environment by receiving input from a variety of sensors, and can affect its surroundings by controlling lights, motors, and other actuators.

With this shield the hardware and associated software are said to have improved in terms of their usability and their capabilities. The libraries are smaller and additionally allow 'asynchronous' use, meaning that Arduino is free to perform other tasks while the shield is communicating.

In addition, Arduino shield users can sign



up to a communication service provided by Telefónica through which they can manage their Arduino remotely from the BlueVia website (BlueVia is Telefónica's global API programme*). The service includes its own Telefónica M2M SIM cards, which will allow access to it from European Union countries, the USA and most of South America.

NEWS UPDATE | NEWS UPDATE

Lantronix launches xSensio analogue device server

Lantronix, Inc., a global provider of smart M2M connectivity solutions, has launched the xSensio™ analogue device server (ADS), a compact DIN-rail or wall-mount device that enables sensors with analogue outputs to transparently send real-time data to any node on the network or over the internet.

Claimed to be ideal for data acquisition and alarm notification in critical environments, the xSensio remotely monitors and logs data from various sensors including temperature, humidity, pressure, level, flow, weight, and gas/air quality transmitters. The product is available now.



"The xSensio is a feature-rich solution with a low port density, which allows for affordable installation in dispersed locations," said Mak Manesh, VP of product management for Lantronix. "Industries such as process control, instrumentation, and industrial/building automation will all benefit tremendously from this solution."



Internet-connected scales aim to make weight monitoring fun

France-based Withings is ushering in its next generation of internet-connected bathroom scales with the Wireless Scale WS-30. This scale combines Bluetooth and Wi-Fi

connectivity to offer a seamless, PC-free experience, from installation to everyday use. The scale instantly recognises individual users and gives them access to exclusive Withings services in order to take control of their weight anywhere, anytime, using the new Withings Health Companion app.

With its Bluetooth and WiFi connectivity the new Withings Wireless Scale connects automatically, whether you keep it at home or take it with you on holiday – you don't even require a PC to set it up, just a smartphone or tablet with Bluetooth.



Elektrilevi selects Ericsson for smart metering in Estonia

Elektrilevi, the Estonian electricity distribution network operator, has signed an eight-year contract with Ericsson to supply, deploy, systems integrate and run a smart metering network. Estonia aims to contribute to the EU target of improving energy efficiency by 20% by 2020. Elektrilevi has nearly 500,000 subscribers on its network.

Ericsson will supply and deploy services on the 2G/3G mobile internet and power-line communication technologies for management and data information,

including deployment of 630,000 smart meters. The Sweden-based company will also integrate the meter and data management operation support systems (OSS), and operate the smart metering network during deployment.

Mait Rahi, manager of Smart Metering Programme Elektrilevi, says: "Ericsson's solution offers us cost savings and enhanced customer satisfaction. The change from manual meter reading to automated remote meter reading will ensure more timely and accurate billing of



customers for their actual energy consumption. We will get more precise information from the electricity network and can take faster action in case of power interruptions and fraud."

Following a pilot project involving 5,700 smart meters this year, the rollout of the rest of the 630,000 smart meters will take place from 2013 to 2016. After that, Ericsson reports that it will provide maintenance for three years and Elektrilevi can extend the maintenance contract until 2025.

GCT Semiconductor LTE single-chip is certified for 4G modules on Verizon Wireless network

GCT Semiconductor, a San Jose-based designer and supplier of 4G mobile semiconductors, reports that its LTE single-chip GDM7240, has been certified for use in 4G LTE modules on the Verizon 4G LTE wireless network. Device makers seeking an LTE module can now benefit from faster time-to-market.

The certification means that original equipment manufacturers (OEMs) can

embed GDM7240 in a 4G LTE module, for use in a variety of devices for consumer electronics, automotive applications, M2M, and smart meters, and take advantage of Verizon Wireless' high-speed service. The use of a certified single-chip will enable 4G LTE device OEMs to accelerate time-to-market for their products.

GDM7240 is already embedded in a Verizon-certified 4G LTE module, from a

leading module maker, that includes functionalities such as OTA-DM and IMS client. GCT's system-on-a-chip solutions integrate radio frequency, baseband modem and digital signal processing functions onto a single die for the 4G LTE and WiMAX markets.



NEWS IN BRIEF | NEWS IN BRIEF

Cadec Global implements Verizon M2M Management Center for fleet customers

Cadec Global, Inc., of Manchester, New Hampshire, a company providing enterprise-class fleet management systems, reports that its PowerVue solution now uses Verizon Wireless' M2M Management Center to deploy and manage devices for its fleet customers with devices on the Verizon Wireless Network.

The M2M Management Center reportedly enables Cadec to simplify and enhance the process of managing communications between drivers and fleet managers. Among PowerVue's features are optimised networking device performance, and simplified device deployment and activation:

Kenya's Safaricom deploys new fraud management system for mobile payments

Kenya's integrated communications service provider (CSP) Safaricom is partnering with UK-based Neural Technologies to implement a fraud control solution that will further safeguard its mobile network and M-PESA platform. Safaricom Ltd will now deploy the Minotaur™ Fraud Management Solution on all its business lines, including M-PESA.

Safaricom provides a comprehensive



range of services, including mobile and fixed voice and data services on a variety of platforms. With annual revenues in excess of Kshs 100 billion (€956 million), it is Kenya's widest 3G network with a growing fibre optic cable footprint and the country's most expansive WiMAX presence.

When it was launched in 2007, M-PESA was the world's first commercial mobile money transfer system. It was launched as a money transfer service, and now has over 18 million customers and more than 39,000 agent outlets across the country.



It's free to be included in The Contract Hot List (below), which shows the companies announcing recent contract wins or product deployments. If your contract is not listed here just email the details to us now marked "Hot List" <j.cowan@m2mnow.biz>

Vendor/Partners	Client, Country	Product/Service (Duration & Value)	Awarded
Aeris Communications	Novotech Technologies, Canada	Distributing Novotech M2M products connected by Aeris' intelligent framework	8.2012
APD Communications	Northants Police, UK	3-year contract to supply telematics solution to police forces in England & Wales	9.2012
Arduino	Telefónica, International	Launch M2M connected device with remote management to assist IoT	8.2012
Cadec Global, Inc	Verizon Wireless, USA	PowerVue now using M2M Management Center for fleet management devices	8.2012
Care Technology Systems	Qualcomm Life, Inc, USA	Announce the availability of CTS' monitoring suite on Qualcomm's 2net™ Platform	9.2012
CradlePoint	AT&T, USA	ARC and COR series routers extended to support LTE and HSPA+ networks	9.2012
Ericsson	Elektrilevi, Estonia	8-year deal with electricity supplier to supply, deploy and run smart meter network	8.2012
G4S Utility Services	O2 (Telefónica UK)	5-year deal to provide up to 1.4 million SIMs and global SIM connectivity	7.2012
GCT Semiconductor	Verizon Wireless, USA	LTE single-chip GDM7240 certified for use on 4G LTE wireless network	8.2012
Giesecke & Devrient	Visa Mobile, International	Visa approves 2 G&D Trusted Service Manager centres for NFC applications	9.2012
GreenRoad	GPS Insight, USA	Offer advanced fleet tracking capability in driver performance management service	9.2012
IBM	Vodafone Group, Global	Mobile comms and cloud computing for remote management of smart homes	9.2012
Meteorological Office	NatWest Bank, UK	To give NatWest-funded renewable energy projects accurate wind speed data	9.2012
Neural Technologies	Safaricom, Kenya	Deploys new fraud management system for its mobile payment service	8.2012
Open Mobile Alliance	oneM2M Partnership, Global	Joins partnership to deploy services in M2M communications systems	9.2012
Orange Business Services	Openmatics, Czech Republic	Partnering to offer international truck and bus telematics services via M2M	9.2012
ORBCOMM, Inc	inthinc Technology Solutions, Inc, USA	Wireless data services for work with heavy equipment, oil & gas, commercial fleets	9.2012
Sprint	Chrysler Group LLC, USA	Develop wireless in-vehicle connectivity for the Ram 1500 pickup & SRT Viper	8.2012
Telit / Nayax	Selecta Nordic, Scandinavia	Cashless services for vending machines in Sweden, Norway, Denmark & Finland	9.2012
Telit Wireless Solutions	Rogers Wireless, Canada	Low profile HE910 modules certified for use on Rogers networks in Canada	9.2012
TIM Brasil	Porto Seguro / Datora Telecom	Brazilian insurance firm partners with MVNE to track 2,000 customer vehicle	8.2012
TomTom/Vodafone	Zenith Hygiene Group, UK	Installs tracking, navigation and ecoPLUS devices across its vehicle fleet	8.2012
Tracker	Wireless Logic, UK	Partner for more flexibility as well as tailored tariffs and management control	8.2012
u-blox	Telstra, Australia	LISA-U200 UMTS/HSPA modem certified Telstra mobile network compatible	8.2012
Vodafone / Mic-o-Data	City of Groningen, Netherlands	Rolls out 6,000 connected bins in Dutch housing estates to encourage recycling	9.2012
Wireless Logic	H2evidence, UK	Data collection by UK local authorities operating cloud-connected 'smart loos'	8.2012

Key:

IoT = Internet of Things

M2M = Machine-to-machine



CONTRACT NEWS

inthinc selects ORBCOMM for global M2M service

ORBCOMM Inc. a global satellite data communications company focused on two-way M2M communications, and inthinc Technology Solutions Inc. a provider of telematics, fleet management and driver safety solutions, have agreed for ORBCOMM to provide wireless data services for inthinc's technology applications in the heavy equipment, oil & gas, and commercial fleet industries in the US.

Through its waySmart™ and tiwiPro™ products, inthinc provides a comprehensive driving safety system that changes driver behaviour in real time to improve safety and fleet efficiency. inthinc solutions deliver a combination of in-vehicle driver alerts, vehicle location and diagnostics, distracted driving prevention, and fleet management features that detail performance and trends for individual drivers or the entire fleet.

Its patent-pending technology can improve driver behaviour, reduce crashes, increase fleet productivity, improve fuel mileage, and reduce emissions for its customers.

ORBCOMM's global data communications service will enable inthinc to send vehicle and driver performance data wirelessly to the web-based inthinc portal.

Chrysler Group enlists Sprint for strategic wireless partner role

Chrysler Group LLC and Sprint have developed a new wireless in-vehicle connectivity experience for the Ram 1500 pick-up truck and SRT Viper sports car.

The companies are evolving the Uconnect Access in-vehicle communication system to include a variety of new, easy-to-use connected features and services to help

keep drivers focused on the primary driving task. Chrysler has enlisted the network, systems integration and consumer market skills of Sprint in a strategic partnership designed to integrate wireless technology into Chrysler Group's Uconnect.

The result is on- and off-board voice recognition technology that makes the car

smarter, so drivers can use their voice to easily compose text messages or enter destination information into the navigation system in one step. The Uconnect Access platform uses the Sprint Connected Vehicle Platform architecture and delivers built-in vehicle connectivity via embedded wireless technology.



Sam Lucero

Lucero takes up M2M analyst role at IHS

Sam Lucero has been appointed senior principal analyst, M2M & Connected Devices at IHS in Englewood, Colorado, USA. **IHS** recently acquired **IMS Research**.

In his previous role at **ABI Research**, Lucero launched the company's

M2M Research Service in 2006, building from a standalone annual report that ABI had published the year before. ABI had been collecting cellular M2M embedded module shipment data from 2003. In 2009 he launched a full research practice area around M2M, with multiple service offerings, including the core cellular M2M

service as well as services covering telehealth, home automation, smart cities, wireless sensor networking, and smart buildings. With a team of analysts based in Singapore and the UK, ABI Research clients ranged from chipset providers and module makers, to operators and software platform providers, making the M2M research practice was one of ABI's most successful research programmes.

In his new role at IHS, Lucero has joined a team of analysts that is focused on the cellular M2M opportunity. Says Lucero, we are "pulling together the existing deep and long-standing M2M research efforts of IMS and **iSuppli** (both now IHS companies), and leveraging the large amount of research content and resources across the IHS organisation.

There are over 100 analysts in the IHS Automotive group, and the entire InMedica division researching telehealth issues, and there are IHS analysts focused on researching smart gas meters. There is also a group focused on mobile technology and operator research. The team can draw on this vertical market research in conjunction with original research that IHS conducts, to address the needs of the cellular M2M ecosystem.

IHS's cellular M2M team consists of Bill Morelli (Manager), Josh Buita (Senior Analyst), and Abel Nevarez (Research Associate). IHS is currently developing and launching a cellular M2M database product that will be updated on a quarterly basis.

Telenor Connexion promotes Larsson to new post of USA Country Manager

Telenor Connexion AB has appointed a new Country Manager for its growing activities in the USA. Previously based in Stockholm, Sweden, Gwenn Bjornstad Larsson took up the position in August.

Larsson, has been promoted from the

position of head of Marketing and Partner Management. She will remain on the Editorial Advisory Board of **M2M Now**, a position she has held since March 2012.

Her responsibilities as head of Marketing will be transferred to Robert Brunbäck

during her American assignment. Brunbäck will be supported in this role by Kristina Grandin, Telenor Connexion's marketing communications manager.



Gwenn Larsson



Pierre Garnier

INSIDE Secure appoints Garnier as executive vice president of its NFC and secure payment division

INSIDE Secure of Aix-en-Provence, France, a provider of semiconductor solutions for secure transactions and digital identity, has appointed Pierre Garnier as executive vice president of the NFC and

secure payment division and member of the management board. Mr. Garnier replaces Charles Walton who has left the company to become CEO of Canadian company **SecureKey**, a partner of INSIDE Secure in

the NFC and secure transactions industry.

Garnier's mission is to continue driving the NFC business of INSIDE Secure as the market develops, leveraging the company's disruptive innovations such as 'NFC booster' on a SIM card, as well as the intellectual property assets of the company. Additionally, he is supervising the introduction of a new range of secure payment semiconductor platforms.

Prior to joining INSIDE Secure, Mr. Garnier was vice president and general manager at

Texas Instruments (TI), where he was in charge of the worldwide baseband business and worldwide wireless strategic programs. At TI, he also managed equity investment and acquisition activities within the wireless ecosystem. Prior to TI, he was chairman and CEO of **Everbbee Networks**, a company developing systems-on-chips for personal internet security devices.

A French national, Pierre Garnier graduated from Supélec engineering school and holds a postgraduate degree in solid-state physics.

For more details and the latest News go to: www.m2mnow.biz



Steve Priestley is Wyleless' managing director, EMEA

Wyleless sees M2M market shifting as clients demand more complex services

Steve Priestley has been with Wyleless since March when he joined as managing director, EMEA. Here, M2M Now talks to him about Wyleless' company strategy for expansion, how its managed services offering is developing, and the expected impact of global operator alliances.

M2M Now: Steve, could you tell us how Wyleless' strategy is evolving, including the acquisition of ClearConnex and the launch of Wyleless Connect?

Steve Priestley: These moves are part of our strategic development plans to become a full end-to-end M2M Managed Services Provider (MSP).

ClearConnex is an innovative engineering and design firm that helps our customers go to market with their M2M products. That range of engineering services includes board level design, embedded software, project management, outsourced technical support and certification services.

ClearConnex also has a licensable device management software platform, ClearComm, that speeds the development of embedded applications in many of the most popular integrated platforms by offering quick APIs to most of the most common requirements in embedded software design. This can shave six months and tens of thousands of dollars off an M2M project.

Over the next six months, ClearComm will be integrated into our Porthos Management Platform, providing the basis for device management solutions integrated with the M2M service delivery platform that our customers and partners use.

Wyleless Connect is our first vertical solution. We saw an opportunity to provide a full end-to-end solution for business continuity services using broadband cellular for internet failover, as well as the digital signage and interactive kiosk spaces. This service requires the two basic building blocks that form the cornerstone of the Wyleless value-add: Our secure, redundant private managed network, and our multiple carriers, nationally, regionally and globally. In the broadband fixed wireless business, coverage is king. The only thing more important is security. Wyleless provides both.

M2M Now: How has the Wyleless Managed Services strategy developed over the last 12 months?

SP: Apologies in advance for 'blowing our very own horn,' but one exciting development has been the **Frost & Sullivan** award for New Product Innovation for Porthos, our web-based Management Platform. It's nice to be recognised for the hard work by our team of product managers, designers and software developers in executing the vision that Wyleless has of being the largest multi-operator MSP in the world. The Porthos platform is the key element that ties it all together, and nearly half of our 90 people globally are in one way or another involved in the on-going Porthos development project which is constantly being enhanced in order to create more value to both Wyleless and our partners. →

Over the next six months, ClearComm will be integrated into our Porthos Management Platform



Wyle's partner, IPS Group have deployed an M2M parking solution in San Francisco



“In the broadband fixed wireless business, coverage is king. The only thing more important is security. Wyle's provides both.”
Steve Priestley,
Wyle's

Rather than give you a shopping list of the new features and enhancements that we introduced with Porthos 2.0. I suggest your readers go to: www.wyle.com/products/porthos-m2m-management-software

We are starting to see a shift from classic MVNO to more of an MSP model, and we don't necessarily see all of our peer group stepping up to the gauntlet that's been thrown down by a marketplace that is increasingly demanding a deeper level of involvement and more complex set of services. So what everyone tries to do is partner. But partnering can sometimes lead to confusion. We believe that a big hunk of the value chain needs to be in one place. That's why we are taking more of a 'project approach' in working with our partners. Today it's all about driving solutions and this trend will continue as the market matures.

So, what are we doing about that? To start we have added a whole new range of services including handling billing and customer support on behalf of our customers; not outsourced, but in-house. We've also added network design and configuration as well as many elements of the supply chain, including hardware selection through warehousing and installation services.

As I mentioned earlier we have also added Engineering and Professional Services to our

portfolio. So, now we can help build the entire solution from mechanical design to embedded software, device management and certification.

Then on top of that, we continue to expand the feature set of our Porthos platform, offering not just Service Delivery for M2M, but really almost an entire 'MVNO in a Box' solution. That's why not only have we been recognised for innovation, but we've also partnered with **NEC**, who will be promoting both Porthos and Wyle's Managed Services to their partners and customers worldwide.

M2M Now: You just touched on services, how important are services to the M2M market in terms of development and ongoing support?

SP: We believe one-stop 24/7 customer, network and technical services are fundamental attributes of any serious player in the M2M arena. These services are key to simplifying the development and deployment of our customer's solutions and, of course, to providing on-going operational support of our customers and partners business-critical applications.

As I mentioned earlier the range of services we offer continues to grow to meet market demands. When you add all of these elements together you get a Solutions Provider that not only offers the pure connectivity, but everything surrounding the →



“We have added a whole new range of services including handling billing and customer support on behalf of our customers; not outsourced, but in-house.”

Steve Priestley, Wyless

service delivery aspect of M2M connectivity. There is a growing trend in the market where ASPs, OEMs and large enterprises are recognising the need for this service layer and agreeing that it must be operator-independent.

We have continued to aggressively build out our resources over the last 12 months and they will continue to grow as our partners demand it. As you know, Jeremy, Wyless has published two articles on Customer Services and Technical and Network Services in *M2M Now* in the past as proof that we take service and support very seriously.

M2M Now: You have been on board as MD of Wyless EMEA for six months, Steve. How is it going?

SP: What a six months it has been, fast-paced, lively, challenging and – most of all – fun.

I joined Wyless as it began to move through a number of significant changes, most of which are focused on driving increased value and support to our customer base during a period of aggressive growth. It is always difficult joining a new company and getting to know the team, but given the pace of change and the need for a high level of communication and participation, I feel that I am no longer a new boy, but part of a well-oiled professional team.

We are delivering on the Wyless vision and I am sure that as we continue to deliver on our customer promise of best-in-class service and support, allied to a broadening product and range of service focused on delivering M2M solutions, we will go from strength to strength.

M2M Now: How will the recently announced global M2M alliance of seven operators affect your multi-carrier strategy?

SP: Interestingly enough, I think it is a firm endorsement of the strategy which we have been implementing over the last two years and is accelerating today.

A global enterprise that is deploying wireless devices across multiple countries on three or four continents cannot be expected to manage the four



or five MNOs required to cover their business effectively. They need a go-to-market partner who can handle the complexities of different service platforms, different billing and rating policies and different supply chain rules.

In theory the MNOs will create alliances, and that will work for some, but this is not a one-size-fits-all market. There will always be complexities that can only be solved by an agnostic end-to-end value added services partner.

Of course, our MNO partners are the cornerstone of our strategy. Our entire business model depends on our ability to layer value onto the MNO networks – without that we’d all be lost! We currently connect to 12 operators, soon to be 14, and unbelievably I predict that it will not stop there, especially as broadband fixed applications proliferate globally. Our partners are pushing us into more and more corners of the world and it will not stop.

M2M Now: What do you see as the key drivers to growing the M2M market over the next couple of years?

SP: The next few years will see an accelerating requirement for ‘faster time-to-market’ by simplifying development through to deployment of customer solutions. To meet this requirement, the value chain must be compressed, and the service providers of the future will need to step up and offer as much of that value chain as possible under one roof. That doesn’t always mean providing 100% of the solution, but taking 100% of the responsibility for delivery of that solution.

M2M Now Jargon Buster

API = Application Program Interface

ASP = Application Services Provider

MSP = Managed Services Provider

M(V)NO = Mobile (Virtual) Network Operator

OEM = Original Equipment Manufacturer

Always-on connectivity is the new burglar deterrent

Most building security systems have a weak spot. As the GSMA's Ana Tavares Lattibeaudiere says, they rely on a fixed telephone line to alert the building owner, law enforcement agencies or a security firm to a potential break-in. A determined burglar will cut that phone line, so there is growing demand for security systems with wireless connectivity, generally delivered via a mobile network.



The author, Ana Tavares Lattibeaudiere, is head of Connected Living, at the GSM Association

Globally, by 2020 there will be more than 24 million security alarms with a wide area wireless network (WWAN) as their primary connection, compared with fewer than 3 million today, according to **Machina Research**. In 2020, almost 6.5 million of these connections will be in Europe, 4.7 million in emerging Asia-Pacific countries, 4.5 million in North America and 3.8 million in developed Asia-Pacific countries.

Many more security systems will use a mobile network as backup connectivity that will kick in if the fixed line connection fails or is cut. As connected security systems typically have their own battery, they will still function even if the power line is cut. Machina forecasts that, by 2020, 40% of all connected alarms worldwide will use WWAN connectivity as a primary connection or as a back-up connection. In fact, more than 60% of connected alarms sold globally in 2020 will have some form of mobile capability.

Robust connectivity will be a 'must'
The rising demand for mobile connectivity is being

driven by a growing awareness that security systems need to have a robust connection to deter thieves and vandals. As well as being able to send alerts, a broadband connection can be used for remote video surveillance, supported by wireless sensors directing cameras towards intruders. If a burglar spots a 'connected security' sign in a window (and while stopping to look at the sign, a security camera spins around to look at the reader), it is far less likely that a break-in will occur.

Jim Morrish at Machina Research, a telecoms research and consulting firm, firmly believes that connected security will become the new standard. He said that people will look back at non-connected security solutions and will think them slightly odd and quaint.

In much of the world, the foundations required for the widespread use of mobile broadband networks to provide connected security are already in place; advanced mobile networks deliver fast data rates, low latency and near ubiquitous coverage. Moreover, the mobile industry is built on a global →



Security solutions are “a hot new market and a headache for would-be burglars.”
Ana Tavares Lattibeaudiere,
GSMA

network of standards-based services and devices that provide a highly stable platform on which to build the connected security systems.

With six billion existing mobile connections and 1.5 billion new devices added every year, the mobile sector already has immense economies of scale, which can be exploited by the security sector.

Cutting insurance costs

For both business and residential owners, connected security will translate into lower cost insurance premiums. For insurance companies, offering lower cost premiums to users of connected security may become a competitive differentiator.

Many home owners and upmarket businesses in the expensive areas of cities around the world are already deploying connected security systems as part of a broader smart home or building management solution, which might also enable remote management of heating, ventilation and air conditioning systems.

SmartMonitoring from **AlertMe**, for example, is a solution that allows home owners to monitor their property when they are away. AlertMe’s ‘SmartSensors’ around the home trigger alerts to the user’s mobile phone or email, or a neighbour’s device, if the owner is out of the country.

The system can be customised with AlertMe’s ‘SmartCameras’ which remotely record events when monitors are triggered, and ‘SmartPlugs’ which turn lights on and off when the doorbell rings. The system can be controlled by the owner’s smartphone or tablet, so it can be turned on and off as required, through the mobile network.

In May 2012, video surveillance and remote monitoring company, **mobiDEOS** launched remote

surveillance authentication capability with **Facebook**. The company’s mobile surveillance application, MobileCamViewer, enables a home owner to use a smartphone to remotely view webcams, IP cameras, digital video recorders and network video recorders online via Facebook.

New players and revenue streams

Demand for connected systems is also shaking up the security industry, and it is providing new revenue streams for businesses that have previously had nothing to do with this sector. As well as providing the connectivity, mobile operators are adopting new roles as suppliers of systems and services and even complete security solutions. Companies that focused on supplying security systems hardware, such **ADT** and **Bosch**, are also moving into connected services by providing hardware solutions, combined with monitoring and the co-ordination of onsite security, such as guards on the ground.

In May this year, **AT&T** announced plans to create US-wide connected home security and automation services. With trials due to kick off this summer, AT&T Digital Life services will soon give users control of the security of their homes via any web-enabled device, computer, tablet or smartphone, on any carrier’s network. AT&T Digital Life will include the installation of an integrated, wireless-enabled platform, sensors and other devices, plus monitoring services by AT&T-owned and operated 24/7 security centres.

In Asia, there is significant investment being put into the development of intelligent buildings and smart city projects, especially by South Korea’s chaebols. **LG Electronics** is a good example of this with its new home network service offering, HomNet. **U-Life**, a company formed by **NSIC** and →



Jim Morrish,
Machina
Research:
 Connected security will be the new standard



LG CNS, is also deploying intelligent building applications in Songdo International Business District, based on HomNet and in combination with **Cisco's** networking expertise and its Smart+Connected Communities programme.

U-Life offers integrated building and facility management, on-premise safety and security, home networking, and virtual concierge services to commercial buildings, apartment blocks, schools and hospitals. Over the next six years, there are also plans to deploy 10,000 Cisco telepresence systems to support this service.

In October 2011, South Korea's **KT Corporation** (formerly Korea Telecom) launched the Smart Home Pad, aimed at people in their 40s and 50s. The service offers a **Samsung** Galaxy tablet pre-loaded with KT's smart home services, including TV and music. Users can also take advantage of KT's security service, Telecop Plus Home Security Service, for an additional KRW 7,000 (EUR 5.00) per month plus installation fee. If an intruder enters a user's home, the alarm is activated, lights switch on and

the owner receives a text message notification. If the user would also like to call out a security guard, there is a fee of KRW 50,000 (EUR 35.90).

Meanwhile, Japan's **NTT East** and **NTT West** are aiming to expand their connected home services beyond entertainment through a joint service platform, called FLETS.

Behind expectations?

Even with all this activity, Machina Research believes the connected security market should have advanced further than it has. The reason it has not done so, says the company, is because it is still difficult to plug the required elements together to create a complete solution – take-off will happen when someone comes to market with a compelling product that is simple to install and operate.

With so many companies developing solutions for this market, that should happen soon. We expect the right products will be available in the next year or so, fuelling the development of a hot new market and a headache for would-be burglars. 

The GSMA represents the interests of mobile operators in more than 220 countries worldwide. It unites nearly 800 of the world's mobile operators, as well as more than 200 companies in the broader mobile ecosystem, including handset makers, software companies, equipment providers, internet companies, and media and entertainment organisations. The GSMA also produces industry-leading events such as the Mobile World Congress and Mobile Asia Expo.



EXPERT OPINION:

The business case for security-enabled communication

As more products become connected they are also exposed to potential 'hacking' attacks, fraud or misuse. Hence, as Stephen Bryant writes, improving privacy, integrity and security becomes a critical part of an M2M service deployment programme.

One of my favourite quotations is Henry David Thoreau's, "Men have become the tools of their tools." As a technologist and firm believer that technology can bring a multitude of benefits for businesses and consumers, I'm also a skeptic as more often than not product and service offerings are shaped around the often awkward mix of technology and suppliers, which comprise the key building blocks of many of our customers' offerings.

In my view, it is the product or service offering that should shape how the technology is delivered. At **Telenor Connexion** we pride ourselves on customer service and the ability to help our customers get their offerings to market, and we're now turning our eyes towards the total business case around security as an area where we can help our customers simplify their connectivity strategy and increase security levels.

The *de facto* M2M set-up for connectivity involves both a private APN and VPN for security which at present is viewed as a basic and uninteresting M2M hygiene factor. But we believe it is time to look past these as the primary means of securing connectivity, so that we can help customers turn security into a solution which helps them reduce their costs, allows for additional revenue channels and provides them with more flexibility in their overall connectivity strategy. And most importantly raises the level of security from the APN and VPN set-up provided by today's technology. So how do we achieve these ambitious aspirations?

Protection from data dangers

Security as it is traditionally presented is a 'must have' hygiene factor to protect your data from the dangers that are lurking out there. Indeed, there have been a number of security-related incidents involving M2M devices – but from experience I don't like to make decisions motivated purely by fear. I also want to reduce complexity, see savings where possible and have the security support the business going forward.

To these ends we have introduced our embedded Security Enabled Communications (eSEC) service, which enables end-to-end encryption all the way from the M2M device through any connectivity channel to a security gateway. This is effectively 'over the top' of any communications technology and sees the need for APNs and VPNs removed.

We believe this is important as most business offering services using M2M have multiple connectivity providers and may also rely on tether devices such as smartphones. The operational overhead and costs for these various security methods is then reduced by using a single end-to-end encryption solution. And by reducing the complexity of a number of security set-ups the overall security level is increased.

Secure Walled Garden

Having an end-to-end security solution also means a Walled Garden where content, applications, payments and other services can securely be made available to open new revenue possibilities.

To accomplish this there are four key criteria – banking grade security, lightweight encryption methods, open roadmap and manageability. All are addressed in the eSEC service. We use accepted and internationally recognised encryption suites and methods, which only add a few bytes of overhead to every packet. We provide a managed service and support products which have a supported and maintained roadmap.

Moreover, the eSEC services are not limited to use with Telenor Connexion's SIM or connectivity, meaning all IP and SMS connectivity can be secured regardless of supplier of connectivity channel. As important as the technology, we provide a full managed security service providing alarms, reporting and 24/7 surveillance and service desk that is ready to act!

This holistic approach of achieving end-to-end security in M2M solutions helps customers reduce complexity, increase security and simplify M2M.



The author is Stephen Bryant, CTO, Telenor Connexion

"Men have become the tools of their tools."
Henry David Thoreau

About the author: Stephen Bryant, CTO of Telenor Connexion

Stephen Bryant has worked with Telenor Connexion since 2010. He is responsible for Telenor Connexion's technology and operations including customer service. Stephen worked for over 10 years across the Occident delivering large scale IT and Telecoms solutions in many verticals whilst working for systems integrators such as Logica, Fujitsu Services and BearingPoint – solutions including Telenor Connexion's M2M platform.



EXPERT OPINION:

M2M and MIM management: An Insider's View

There are billions of devices needing authentication in the world today ranging from cell phones to household appliances to laptops to ID badges and beyond. And one thing most of them share is a smart card-based technology, says Benoit Jouffrey.



The author is Benoit Jouffrey, vice president M2M Value Added Services at Gemalto

A world of securely connected devices

In the telecom world, the Universal Integrated Circuit Card (UICC) identifies the device and user to the mobile network operator (MNO) and therefore ensures the integrity and security of all kinds of personal data.

The network authentication applications carried by the cards vary according to use case and wireless network technology, ranging from 2G to LTE to CDMA and everything in between. For instance, the USIM are used for GSM 2G/3G networks, CSIM for CDMA2000 networks and ISIM for IP-multimedia subsystems.

The variety and wide spread use of smart cards demonstrates the technology's success, reliability and capacity to adapt to evolving networks and changing MNO needs. When machine-to-machine (M2M) technology came on the scene, it quickly became evident that a new SIM (subscriber identity module) card was needed to address the industry's specific needs.

Subscribers and machines, a study in contrast

Machines and subscribers have vastly different needs! Where consumer devices are in homes, on planes, schools and generally kept close to pocket or bag, M2M solutions can be found in an array of harsh environments – outdoors in arctic pipelines (pictured) inside manufacturing facilities with uncontrolled temperatures, in trucks and automobiles and many more.

Components and parts for M2M solutions need to be ruggedised for extreme reliability over long lifespans. As such, a new smart card was needed designed for durability and severe conditions of temperature, vibration, humidity and corrosion. It needed to be miniaturised to fit and integrate easily into tiny spaces in machines and equipment, and it needed to be secured to defend against fraudulent use or tampering of the cards. In 2010, the **European Telecommunications Standards Institute (ETSI)** defined a new standard specifically for M2M applications – the Machine-to-Machine Form Factor, or the MFF¹, a smaller, solderable version of the UICC.

Leveraging this new ETSI standard, **Gemalto** developed and deployed a full range of M2M optimised SIM cards known as Machine Identification Modules or MIM™ cards. Designed in both solderable and plug-in formats, they use more robust chips combined with a specialised Operating System to ensure longevity and a more robust card body. And we didn't stop there!

In July, Gemalto became the first ISO TS 16949 compliant SIM manufacturer offering unrivalled quality assurances and certified, traceable production processes. These first ISO TS 16949 products are automotive-grade MIM engineered for enhanced rugged road conditions and offering a 17-year lifespan and one billion erase/write cycles!

Remote control and service solutions, a winning combination

From a remote management standpoint, MIM cards →

¹ Machine-to-Machine Form Factor. Cf. ETSI TS 102 671 V9.0.0 (2010-04), *Technical Specification, Smart Cards; Machine to Machine UICC; Physical and logical characteristics (Release 9)*, April 2010.



offer the same characteristics as traditional SIMs: they can be configured and provisioned Over-The-Air (OTA) for Remote-File-Management (RFM) or Remote-Application-Management (RAM) purposes. For instance, MIMs can download, manage and upgrade OTA-specific applications such as an IMEI lock which is used to restrict use of an M2M application or device in specific countries and with network providers.

But once again, M2M technology solutions have specific requirements that go above and beyond what is expected of traditional connected devices. For instance, an M2M implementer or MNO might need to know at any given moment, the remaining lifespan of a dedicated MIM. This is particularly important for M2M applications such as automotive telematics that can be difficult to access and where component recalls can be extremely costly, even several hundred euros per vehicle.

To illustrate this point, consider the challenge of a lift operator who uses an M2M solution to remotely monitor elevators. Incorrect device implementation can lead to extraordinary writes on the MIM, which can lead to service failure. However, Gemalto's client-server MIM services solution allows end users to detect inappropriate MIM usage and preempt service failure. Audit alerts or OTA campaigns, especially during the initial phases of device deployment, can help significantly improve quality of service and longevity of the solution.

With Gemalto's service solution, you can easily track vital parameters of your device, getting accurate, up-to-the-moment data plus real-time alerts if issues arise regarding network coverage or battery life. By leveraging MIM capabilities and Gemalto's service solutions, challenges like these are easily overcome and costly repairs averted which helps M2M players enhance quality-of-service and return on investment (ROI).

Subscription management evolution

In essence, the job of the MIM is to securely store authentication parameters and algorithms for a machine, just like a SIM does for a subscriber. But as the GSMA described in a white paper issued in

February 2011², M2M specificities are again leading to a number of new requests. Flexibility in subscription management has existed for quite some time and IMSI-swap or multi-IMSI cards are well known and widely used technologies. But, for instance, new standards are needed for downloading over-the-air the subscription of a connected device integrating a solderable MIM.

A number of industry organisations, such as ETSI, **GSMA** and the **SIMalliance** are actively working to define this new standard for the subscription management process without compromising the overall security of wireless networks. Gemalto is an active participant in these standardisation initiatives and has recently run numerous successful pilots and demonstrations dedicated to identifying and meeting our customers' emerging needs.

Gemalto has more than 450 operator customers worldwide and has deployed hundreds of client-server solutions with all types of business models and with hosted or in-house configurations. We are leveraging more than 15 years of Cinterion M2M expertise and knowledge and working closely with our customers and partners to identify needs and opportunities and to jointly define best practices and technologies for moving forward – it's an exciting time in the industry!

Small is beautiful - durable, powerful, MIMs are the way forward for M2M

The small and powerful SIM card has proven its capabilities and reliability billions of times over since the technology emerged with the birth of GSM networks. Building on SIM card success, M2M optimised MIMs are helping to accelerate marketplace expansion and secure the growing Internet of Things.

The use of client-server solutions based on MIMs, the 'M2M thin client', can contribute to better quality of service and better diagnostic capabilities throughout the M2M ecosystem. In the end, the MIM is showing its capacity to adapt to evolving marketplace needs, offering much needed subscription management flexibility. Small is beautiful. When you think M2M, think MIM. 

"The MIM is showing its capacity to adapt to evolving marketplace needs."
Benoit Jouffrey,
Gemalto

² Cf. GSMA, *Embedded SIM Task Force Requirements and Use Cases v1.0*, February 2011.



Guy Summers, O2: "You need capacity in different places."

Sink or SIM?



Dan Amir, Telit: "It is a complex task."

As more devices come online, the problems of managing the connections increase. Steve Rogerson looks at how the current subscriber identity module (or SIM) models will have to change.

When it comes to M2M applications, the days of the plastic SIM card are numbered. The convenience and increasing flexibility, combined with serious work being done by the **GSMA**, mean that embedded SIMs will be the way forward. But with that comes challenges over roaming and agreements between different operators as the number of embedded SIMs grows quickly. Managing such vast quantities of connected devices creates problems not before seen.

This will also bring with it a change in the business model in that M2M-enabled devices can be sold without a subscription. So, for example, a device that only sends and receives data rarely, could be linked into a mobile network for a very small monthly fee.

"If the monthly cost is small, you could prepay for up to five years when you buy the device," said Patryk Szymczak, CEO at **Monitech**. "This means you can sell it in consumer shops. The business model is much simpler. The device would have a MIM installed but the user doesn't even need to

know that. You give them a device that works out of the box."

There are two ways that such devices can be accepted in the network. The first works in a similar way to some standard SIMs for mobile handsets. These can be shipped without specifying authorisation details and only when they attempt to connect do they go through an identification process in which the user is involved. An M2M device could make the connection in the same way, exchange information and then go off the network without actually going through a full verification process.

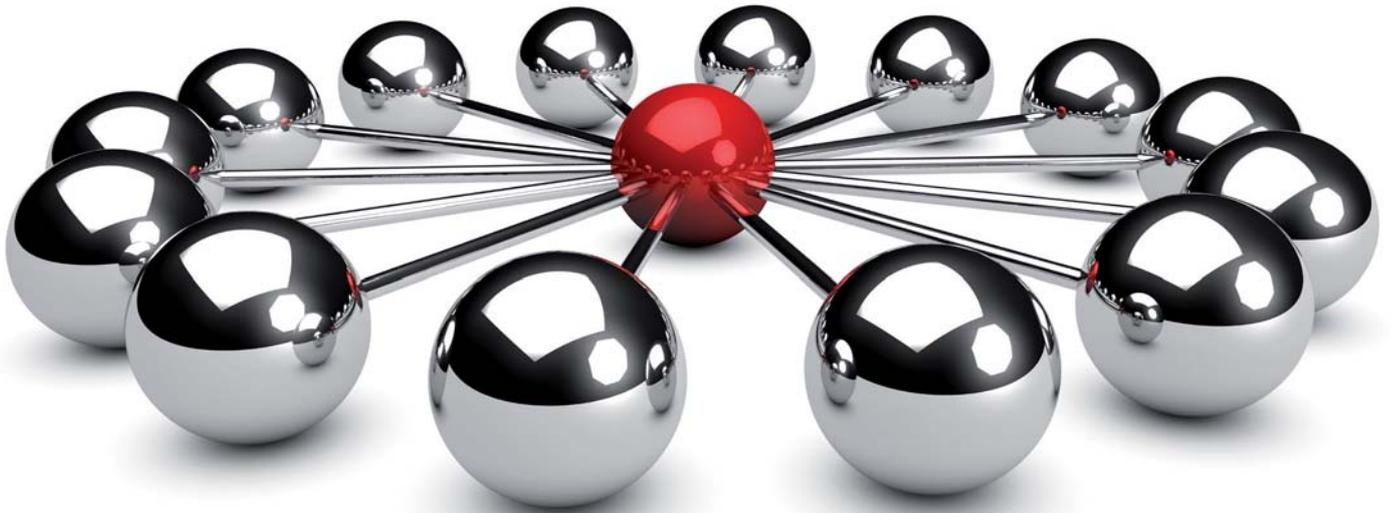
"We think of these as virtual connections," said Bill Chard, vice president of products for **Evolving Systems**. "If we treated them like conventional network devices, we would have to allocate them server resources. What we do is detect when they connect to the network and we give them a temporary connection."

A typical scenario could be that a telematics company buys the SIM cards in China. They sit in a →



Bill Chard, Evolving Systems: "When you have many thousands of SIMs, you don't want them tied to one specific network."

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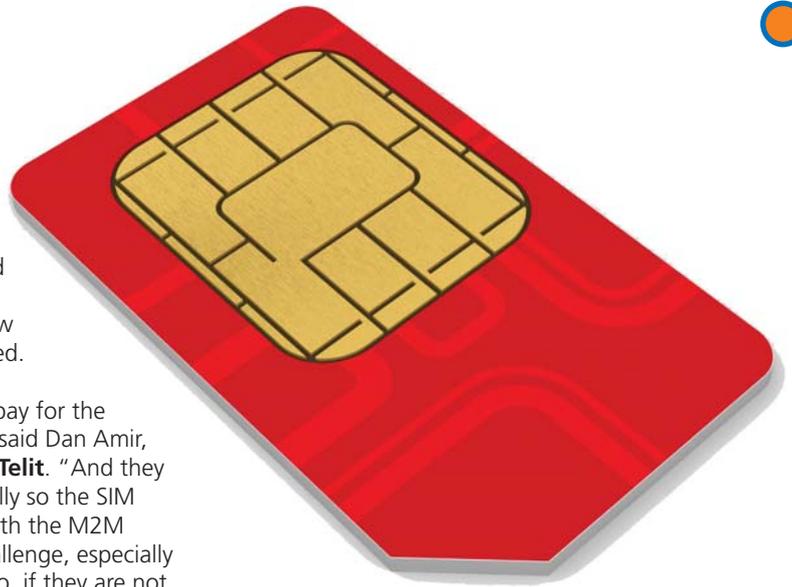
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Fredric Liljeström: "The embedded SIMs won't solve every single problem."

warehouse for a few months and then they are sent to be evaluated by a customer for a few months before a contract is signed.

"The customers do not want to pay for the SIMs until they are subscribers," said Dan Amir, head of connectivity activities at **Telit**. "And they want this to be done automatically so the SIM subscription has to be aligned with the M2M service activity. This is a huge challenge, especially when profit margins are low. Also, if they are not using the M2M service they need to be shut down for a period and then start again when the subscriber returns to an active state."



Gilli Coston, Telefonica UK: "A growing number of customers are building a solution in one country and deploying it in more countries."

The operator viewpoint

On the other side of this equation are the operators, who do not want people to access their network without a SIM subscription.

"They want that to continue," said Amir. "And more and more operators are having to think about how they can access different home location registers (HLRs). The SIM needs to access the various networks with all the security challenges that brings. It is a complex task."

The other way is the embedded SIM route where the devices themselves are produced with a SIM circuit already fitted without any knowledge about which network and in which country they will be used.

"If you make M2M devices, you want to make them in one location and ship them around the world without programming them for different networks," said Chard. "When you have many thousands of SIMs, you don't want them tied to one specific network."

Guy Summers, head of connectivity at **O2**, added: "There is a clear need for embedded SIMs in the global M2M market. They want to put the SIM in a device in, say, China and ship them round the world."

Cost could be an issue until volumes of embedded SIMs start to bring down the prices. This will be more significant in some parts of the world. In India, for example, some do not believe embedded SIMs will be part of the model for some years.

"The hardware is prohibitively expensive," said Vinay Puli, CTO at **3G Cellabs**, "whereas GPRS hardware is easily available. This is why we still have the SIM-card based solution. It will be four to six years before we see that change here in India. The costs have to be very low because existing hardware is so cheap."

News in November?

As regards specifications for such embedded SIMs,

the GSMA is working on that and is expected to make an announcement in November, so next year the market is likely to see a lot more products using this technology. The GSMA is also working on a model to allow roaming with embedded SIMs.

"There is an initiative from the GSMA to propose a way of routinely changing from one operator to another with the agreement of the operators," said Vincent Guitard, OEM marketing manager for **Oberthur**. "This will be a pretty long process. But the GSMA is an association of operators so the operators will have a lot of influence on what is decided. The operators are trying to protect the ownership of the subscription."

This is shown by the reluctance of some operators to play the game.

"A growing number of customers are building a solution in one country and deploying it in more countries," said Gilli Coston, head of M2M at **O2**. "Roaming becomes an issue in Australia, certain parts of the USA and other places where the operators do not want permanently roaming SIMs on their networks."

Summers added: "Some regulators do not allow permanent roaming. The embedded SIM can get round that by letting you join a local carrier but that depends on strong partnerships."

Fredric Liljeström, an executive with **Telenor Connexion**, warned: "The embedded SIMs won't solve every single problem. They will though give us more opportunities to build more interesting business cases. It also gives more power to the users." An example of this would be a fleet manager with telematics devices in all their vehicles. These would have embedded SIMs that were not locked to an operator. This means the fleet manager can shop around among operators looking for better deals. However, this does bring other problems with say devices in fixed locations such as with smart electricity meters. If the owner decided to change operators then care would have to be taken that the new operator had sufficient coverage in all the places the meters were installed. →



Patryk Szymczak, Monitech: "The business model is much simpler."



Vinay Puli, 3G Cellabs: "The hardware is prohibitively expensive."

There will also be problems for operators with the vast number of devices they will have to handle.

"It creates different challenges to smart phones," said Summers. "You need capacity in different places. But the network platforms are scaling. When you look at LTE and 4G, the problems of handling this disappear."

Coston added: "On data throughput, this is far lower on M2M, so even though the number of subscribers is high the amount of data is low."

There will though still be difficulties with the signalling traffic but it will be helped by the nature of M2M in that not all the devices are connected at the same time.

"There are standards for this that will be in the networks in two to three years to give more efficient ways of doing this," said Summers. "ETSI and 3GPP have been working on these standards for three to four years."

Axel Hannsman, VP Strategy & MarCom at **Gemalto** said, "SIMs, or machine identity modules (MIMs) as we prefer to say, play an important role to provide secure access to a mobile operator's network. But there are two more pain points that need to be addressed: ruggedisation and flexible operator provisioning."

Gemalto's MIM technology has been specially hardened to meet the demands of harsh environment that M2M applications can be exposed to. There are both hardened plastic pluggable MIMs and solderable MIMs. The latter are now available in an automotive grade.

With regard to flexible subscription provisioning, Gemalto's customers offer global solutions but they also need to restrict variants to a minimum to lower their costs and optimise processes. Using a ruggedised solderable MIM limits flexibility if you have to predetermine the target operator at the time of manufacturing. So Gemalto offers late stage personalisation, and flexible subscription provisioning.



Vincent Guitard: "The operators are trying to protect the ownership of the subscription."

The author, Steve Rogerson, is a freelance technology journalist

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'Developer Garden' aims to be DT's ideas catalyst for M2M developers worldwide

As we reported in the news at M2MNow.biz recently, Deutsche Telekom (DT) has launched an M2M website as part of its 'Developer Garden'. Here, the incumbent German network operator describes how it offers access to tools such as application programme interfaces (APIs), programming guidelines and software development kits (SDKs) to develop and sell M2M applications that use its networks.



In this exclusive interview with **M2M Now**, Jürgen Hase (pictured), head of Deutsche Telekom's M2M Competence Centre, discusses the launch of the M2M-Developer Community's internet portal.

M2M Now: Mr. Hase, Deutsche Telekom's 'Developer Garden' internet portal is already an important destination for developers. Why have you now also launched a 'Developer Community' for machine-to-machine (M2M) communications?

Jürgen Hase: Over the last three years, Developer Garden has grown into a successful hub for programmers. Over 7,000 users are already active on the portal. We now want to continue this success story and integrate our M2M Developer Community into the Developer Garden portal.

We are offering developers of M2M solutions a knowledge exchange and networking platform, expert support, as well as practical APIs and help with programming SDKs. The Developer Community will be an ideas catalyst to support the growth of M2M technology.

We believe that in the future, we will need new ideas and solutions for a variety of applications in different industries.

M2M Now: How are developers benefiting from the new portal and what can they do there?

JH: Through the Developer Community, we are offering programmers access to Deutsche Telekom's connectivity services so that they can integrate these services easily into their M2M solutions. For example, a developer wants to determine the location of the relevant smartphone user for a mobile business app.

He can easily integrate this functionality into his application by using our location API.

Programmers from all over the world can exchange ideas and implementation methods on the portal. In addition to the community, a team of experts from Deutsche Telekom is available to offer advice for more complex queries. Developers can also purchase the hardware they need for a project on our M2M marketplace with just a few clicks. We will shortly be offering developers a very exciting new tool which can test an M2M solution in a virtualised environment and, where applicable, quickly clear any bugs.

M2M Now: How can developers take their products to market when applications are ready for release?

JH: This is where the M2M Marketplace, which we launched at the beginning of June, can help them. It is here that we bring together all the players in machine-to-machine communication – and give developers the opportunity to market their programs. In this way, we want to significantly shorten the time between the idea and commercialisation.

M2M Now: Machine-to-machine communication is a complex topic. What enables Deutsche Telekom to operate an M2M developer portal?

JH: Deutsche Telekom has many years of experience in M2M communication. In 2010, we bundled our international knowledge and expertise into the M2M Competence Centre. →



We not only provide the basis for every M2M solution: the network connection via SIM cards; the best networks and competitive prices. Our strength is that we bring network, IT know-how and industry competence together. We offer everything required for an M2M solution to work securely, from a single source, from pure data transmission through to complex applications.

Finally, we have been able to gather experience in administering and supporting a developer portal over the past few years with the successful Developer Garden.

M2M Now: The M2M marketplace in June, now the Developer Community – why is Deutsche Telekom placing so much emphasis on M2M innovation?

JH: We are convinced that the M2M market will boom over the coming years. According to information from the OECD, the number of networked machines will rise to approximately 50 billion in 2020. There is no doubt that the demand for the various options provided by this technology will increase dramatically in nearly all industry sectors – the applications range from process optimisation through to completely new business ideas. At the same time, the market is extremely heterogeneous.

We are, therefore, already opening ourselves up to developers whose innovative spirit we want to strengthen and support in practical terms – and whose competence and creativity we are bringing together with our infrastructure and experience. This results in strong partnerships, for example with start-ups, to whom we are granting access to global markets – and which give our company an advantage over international competition. We offer competence and

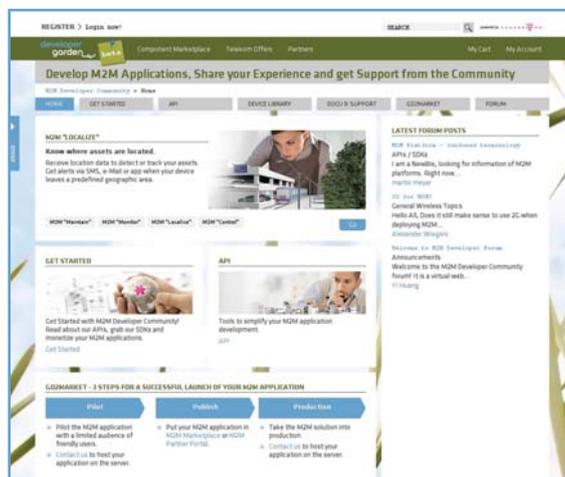
diversity with which we want to conquer a large share of the market and drive the market forwards.

M2M Now: Those sound like strong strategic motives for launching the M2M Developer Community.

JH: Yes, establishing the M2M Developer Community is another important component of our M2M strategy. We see machine-to-machine communication as an ecosystem which comprises data transmission in the mobile communications network as well as various hardware and software components and solution expertise in different industries.

In order to design the ecosystem, we want to co-operate and partner with IT and other companies, hardware producers and also with developers. The Developer Community, like the M2M marketplace previously, is therefore an additional integral step in the implementation of our strategy which enables us to position ourselves on the M2M market in the long term.

“We want to co-operate and partner with IT and other companies, hardware producers and also with developers.”
Jürgen Hase, Deutsche Telekom's M2M Competence Center



How do users benefit from the M2M Developer Community?

They get the opportunity to network with developers worldwide, gain advice from Deutsche Telekom's experts, create applications using the tools and guidelines, and to market their solutions via Deutsche Telekom's M2M Marketplace. Deutsche Telekom brings all M2M players together in this marketplace. Developers can also buy the hardware they need for their solutions here.

Via the M2M Developer Community, users are also given access to Deutsche Telekom's core services: using the company's connectivity interfaces, as well as the location, SMS and telephone services, they can easily integrate these services into their apps. The APIs can be addressed directly via SOAP and REST.

What can the APIs be used for?

There is a Send SMS API, for example. This can be used in an app to send a confirmation message for online orders.

Which functions does the portal start with?

- Telekom Connectivity API
- Developer Guidelines
- Device Library
- Contact (Q&A)
- Go2Market Support
- Forum with the categories "Announcement", "Documentation", "Feedback" and "APIs/SDKs"

Who provides support?

Support is provided via Deutsche Telekom's M2M Competence Centre. Other Deutsche Telekom departments are also available for advice if required. Developers therefore benefit from Deutsche Telekom's know-how as a global player.

What is the plan for further development of the portal?

From this autumn, the M2M Developer Community will start its developer platform. Making development easier is an important goal of the M2M Developer Community and one of the new features being developed is a virtual mock-up environment. This enables developers to test their applications immediately in a virtualised environment.

To register free of charge with DT's M2M Developer Community go to: www.developergarden.com



Point-to-point fibre enables Stream Communications to boost bandwidth tenfold 'at a moment's notice'

Problem: Stream's existing 1Gb/s managed wavelength was not going to support its growth plans or the exceptional end-user experience required by customers of its high capacity 3G services.

Solution: A Geo dark/dedicated fibre point-to-point which enables immediate scaling from 1Gb/s to 10Gb/s at no extra cost

A leading provider of GSM, GPRS and 3G mobile network services for the machine-to-machine (M2M) sector, **Stream Communications** also provides M2M SIM cards for high capacity 3G services. It is the preferred partner of **3, Orange, Vodafone**, and other international network operators. Its services include private IP networks for Stream SIM cards, IP addressing and specialist VPN solutions to provide its customers with high levels of resilience and network uptime, and end-to-end network security.

Until recently, however, Stream faced a problem; it needed scalable fibre capacity at a flat, controllable cost. The company, based in Glasgow, was hosted in in Edinburgh and London, and was finding connectivity to its network partners restrictive in both speed and cost. Specifically, it needed direct fibre connectivity into mobile operator 3's core backbone, to deliver a new, advanced 3G network service called Freeflow.

It identified an alternative site in Manchester and researched connectivity between its hosting site in what was formerly Parkway2, and 3's Kings Park data centre in Old Trafford.

Stream originally procured a 1Gb/s managed wavelength from an alternative supplier, but was concerned that, as the new Freeflow project grew, its existing infrastructure wouldn't provide the level of end-user experience that Stream prided itself on. It also felt that the binary costs associated with buying multiple managed gigabit services would reflect few economies of scale, and would quickly become a significant operating cost to the business.

The solution:

Stream contacted a number of different network providers, including Geo. After considering the costs of managed services, Geo suggested to Stream that it consider procuring its own dedicated fibre network spanning the 6.7km, to facilitate the rapid and cost effective addition of extra bandwidth.

"When we assessed the cost of buying additional 1Gb/s bandwidth as our infrastructure capacity requirements went up, there was a compelling business case to justify buying the fibre ourselves and increase our bandwidth as we needed to," said Alan Tait, technical manager at Stream. "With our own dedicated fibre, we can tap into a virtually limitless

reserve of bandwidth, which is critical for a technologically innovative organisation like ours."

Geo offers a managed service on its dedicated fibre, but on this occasion provided a dark fibre point-to-point connection, allowing Stream to fully manage the network itself. The company is now able to light extra bandwidth as and when its business dictates, at a cost of just the transmission equipment as opposed to OpEx-heavy additional circuits.

Another key benefit to Stream was that Geo was already on-net, providing 3's national backbone. This removed any last mile costs that Stream would otherwise have had to pay.

"The decision was remarkably simple; Geo was on-net, had the capacity and provided us with a service that delivered an economic advantage to our company. We all liked the team at Geo's attitude immensely, and the implementation took just six weeks."

The company has so far lit one fibre pair, which is running at 1Gb/s. However, the equipment that it has installed at each end enables it to scale up to 10Gb/s "at a moment's notice".

The benefits:

"The network was installed to form the backbone of our advanced 3G Freeflow offering, which was launched early in 2012," continued Tait. "Our main driver was to have high capacity connectivity between us and 3, which we could scale easily. Dark fibre and controlling our own terminations means that we can scale up without intervention, which is critical to our providing high capacity, high quality services to businesses through Stream and consumers through Freeflow."

The instant ability to scale and the lower overall cost were deciding factors for Stream. "As we manage the hardware and network, scaling up is as simple as resynchronising the connection or upgrading the hardware, and can be done in just a few minutes," continued Tait. "We're saving costs already on the price of a 1Gb/s wavelength, as our running costs are 60% lower than that of an equivalent wavelength contract. However, the biggest advantage is that our costs aren't going to go up; we're not only in complete control of our network but also of our overheads." 

Benefit:

- A controllable network that can be scaled up without intervention
- Delivered savings versus a managed wavelength from day one
- Scalable at a moment's notice
- 60% reduction in management costs



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New engine under the hood in San Diego



Jeremy Cowan

It's been no secret that the CTIA wanted to re-vamp their Enterprise & Applications event held in San Diego in October. After a top-to-toe makeover, what they've come up with is MobileCON™ 2012. The date and venue are unchanged but under the hood it has an all-new engine. The MobileCON™ conference is now 100% enterprise and mobile IT focused — the organisers say that this makes it the only event of its kind. As the PR says, "Powered by CTIA".



The event is now designed specifically for the IT executive and professional (including M2M). Here a corporate user conference meets a trade show; it's designed to be a one-stop shop where you can learn how to solve your most pressing problems in enterprise mobility. Come and see us at **Booth 224** in San Diego where we can all benefit from three days of thought leadership, actionable education, peer-to-peer learning and mobile IT solutions shopping.

And a Diary note for 2013

Finally, a quick note for your 2013 Organiser. If you're a fan of the CTIA shows, as we are, put a note in your diary for May 20, 2013. We are organising a brand new telehealth event in Las Vegas the day before International CTIA Wireless, with an emphasis on networking and discussion. Produced in co-operation with CTIA, **Money Talks – eHealth** will explore M2M telehealth's business opportunities and successful profit models. We'll also be showcasing some astonishing M2M e-healthcare applications. There'll be much more agenda information, pricing and joining instructions shortly at www.m2mnow.biz

Jeremy Cowan, Editor

C-LEVEL VIEW: 32

EXPERT OPINION: 36

MobileCON™ 2012: 39



SUPPLEMENT CONTENTS

C-LEVEL VIEW: Interview with Fred Yentz, CEO of cloud-based platform provider, ILS Technology **32**

EXPERT OPINION: CEO, Thomas Seiler, describes u-blox' preparations for a high bandwidth future **36**

MobileCON™ 2012: What's in a name, asks Steve Rogerson, as CTIA's October show changes tack **39**



ILS chief looks for simplicity, security and speed to market as more industries adopt M2M

What are the keys to significant growth in M2M (machine-to-machine) services? Jeremy Cowan talks to Fred Yentz of ILS Technology, which offers a leading off-the-shelf cloud platform connecting enterprise IT systems to devices and machines.



Fred Yentz is the president and CEO of ILS Technology

M2M Now: M2M communications have evolved a great deal in recent years. In your view, what have been the most significant factors? And how would you describe the current state of M2M services?

Fred Yentz: A few different elements have fallen into place around the same time – together driving a more rapid evolution in M2M than we've seen before.

First of all, the growing ubiquity of mobile networks and maturing wireless technology in both local and personal area networking, all combined with existing wired infrastructure are providing truly global reach and connection access. I'll call that phenomenon availability.

The next significant factor is affordability. Falling broadband costs and growing availability of application tools have reduced the barriers to entry by small and mid-sized players in addition to the largest of enterprises, who are looking for ways to maintain a competitive edge with now readily accessible 'Right-Time' information from important assets and devices.

Finally, and perhaps the most important factor is a awareness. M2M is no longer the tech sector's best kept secret. With so much talk around M2M, the internet of things, smart cities, connected cars – whatever the catch phrase might be – you'd have to be living under a rock not to be aware of what is possible.

As a result of growing buzz, the message target has moved beyond the early-adopter technologists and into the C-Suite. If information is power, then businesses who are aware of the capabilities of M2M must ask the pressing questions about business

improvement, competitive advantage and sustainable differentiation. While they may not call it M2M, they all understand the value of right-time information.

So, where does that put us today? It leaves us under the gun to deliver real business value – not just hype. Customers want solutions that can 'Make money, save money or keep them compliant'. Aware business executives realise that M2M is substantially an extension of their enterprise information network. The extended M2M network must have global reach across multiple geographies, multiple networks, the flexibility of wired, wireless or even satellite networks.

That being said, the issue to is not network or connection availability as much as it is about the connection methods at both ends of the network. What this means is the method of speaking to the remote devices must utilise edge intelligence to optimise traffic. Savvy business executives also realise that they must integrate M2M seamlessly with their existing back-office applications and enterprise resource planning tools.

While there is a grand view that M2M will radically change how many companies do business, I'm more pragmatic. What I'm seeing and expect to continue to see is enterprises evolving with the addition of M2M solution-driven information. That evolution will be rapid, but investment will be based on incremental improvements to the current business models.

The other significant thing happening today, which frankly I consider a distraction, is a push by industry players for a higher position in the value chain. For example, carriers don't want to be pipes, and hardware providers are going after software and service revenues. There are still some shake-ups that →



“Aware business executives realise that M2M is substantially an extension of their enterprise information network.”

Fred Yentz, ILS Technology

will happen through consolidation and so many players manoeuvring for higher wallet share.

M2M Now: Service providers offer either end-to-end solutions for industry verticals (like automotive or smart energy) or horizontal solutions across many industries. Which approach will dominate the market, and why?

FY: First of all, it's very appealing for service providers to try to offer an end-to-end vertical subscription application to their end customers. Capturing higher value is their objective, and many vertically integrated M2M solutions have been and will continue to be successful. That being said, there are some challenges in providing a perfect fit application that is also applicable to the broad enterprise base of customers. That's where I seek to balance folly with fact and flexibility.

The folly looks like this: emerging solution providers and some MNOs (mobile network operators) are looking for select magic applications. As I said before, some vertical end-to-end applications will indeed be successful. The trick is to figure out which ones will succeed.

The problem with this approach is the fact that very few businesses within the same vertical have exactly the same requirements. Actually, it is rare even within a large enterprise for different business units to share the same requirements. Picking the right vertical application solution is like playing roulette and placing the bet on a single number. If you hit, the payout can be handsome. Unfortunately, the odds are not in your favour.

Fact: If you subscribe to the notion that businesses will adopt M2M functionality to enhance the business they →





“Evolution (to M2M) will be rapid, but investment will be based on incremental improvements to the current business models.”
Fred Yentz, ILS Technology

run today in the hope of running these businesses better tomorrow, then you have to take into account that most existing businesses already have invested in data-driven applications, processes and services. Accessing remote data, transforming it into ‘right-time information’, optimising the operating cost for bandwidth, and delivering this usable information into those business applications which yield improved operational return are all a requirement.

The **ILS Technology** approach is grounded on flexibility. I am blessed to have an experienced team and robust intellectual property that can only come with time. Basically, our team, formerly **IBM**, has done this stuff forever, since before M2M was even called M2M. As a 12-year-old company with a 30-year history of device and application integration, what we’ve been able to do is create an M2M application platform that seamlessly integrates the endpoints to solve real business objectives.

We’ve done so through the robust set of integration methods at both ends of the network. Mature driver libraries, robust APIs and a collection of IT application transports provide the flexibility to connect existing and new ‘Things’ to the ERP solutions and applications on which enterprises depend every day without the need to author custom middleware. The ILS Technology deviceWISE M2M Application Platform delivers on the promise of making businesses work better while leveraging existing capital investments in application, training and process.

M2M Now: One of the great benefits of a horizontal approach is a shorter time to market, but how do you prove that time and cost advantage to customers?

FY: Time is Money. It’s a cliché precisely because it’s true. Let me ask you: is SMS a horizontal application or a vertical application? Email? Broadband wireless? What about the smart phone or the iPad? M2M is not an application. M2M is an applied set of technologies capable of enabling intelligence. The trick is allowing the application of this intelligence to integrate seamlessly into your specific business or vertical application. Whether you are an enterprise looking to enhance your operations with better information, or an emerging application service provider trying to deploy the next killer application, it’s critical that you use the best tools and products to get the job done in a timely and supportable fashion.

Ours is a horizontal offering that can be and is customised to support specific vertical applications. To do so, we provide vertical profiles (vertical applicable device connectors for building automation, industrial, energy and datacenter, just to name a few) to further

accelerate the deployment of our horizontal platform inside your business. I think that best-in-class M2M solutions will be created from best in class infrastructure, technology and platforms that bring it together quickly.

M2M Now: Simplicity is a crucial goal for service providers and their end user customers, but it seems incredibly difficult to achieve. Why is this, Fred, and what are the solutions?

FY: Achieving M2M simplicity has historically been difficult due to a lack of available, affordable solutions. The biggest impediment to finding simplicity with a solution is figuring out what problem you are trying to solve. Unfortunately, many early attempts at M2M solutions began and ended as technical science projects. They were laden with high costs of professional services and required continued engagements for ongoing support.

Fortunately, today, M2M solutions can be configured to solve well understood business objectives, and are driven by managers and executives who can deploy a team to use best-in-class tools. We are seeing highly effective yet simple business solutions deployed in a timely and affordable fashion. If you can put the right tools into the hands of the subject matter experts who are charged with building, using and supporting the M2M business-enabled solution they will make it simple.

Our approach is to start by leveraging a customer’s existing business application in order to speed implementation, reduce the need for user training and allow their business to evolve. Using our platform, the customer can quickly translate business know how into an M2M solution. Speed and savings come from easy configuration, driving down the high cost of professional services and ongoing maintenance. By deploying the right tools, they can empower their customers to implement solutions that fit the enterprise business needs and provide insights which can foster additional business creativity and future M2M use-case evolution.

M2M Now: If we are to realise the full potential of M2M what role will enterprise integration play?

FY: I believe enterprise integration is imperative to realising the full potential of M2M. A great place to look for successful M2M vertical applications is in vehicle telematics – implementations like **GM** OnStar, or the **Progressive Insurance** Snapshot discount. I suspect neither of these solutions would have been realised if not for seamless integration into the enterprise systems of their respective corporate owners.

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EXPERT OPINION:

u-blox prepares for M2M's high bandwidth future

Four recent acquisitions by Switzerland-based u-blox, specialists in positioning and wireless semiconductors and technology, have made the company a serious player in wireless M2M. Here, CEO, Thomas Seiler talks to *M2M Now* about u-blox' next steps.



Thomas Seiler,
u-blox: We give
our customers
a choice

“Our recent acquisitions of NeonSeven, Fusion Wireless, 4M Wireless and Cognovo have rapidly positioned us as a serious player in the wireless M2M markets.”
Thomas Seiler,
CEO, u-blox

M2M Now: In a market with so many different applications for M2M technology are there any common challenges or significant market barriers?

Thomas Seiler: The M2M market is very diverse, and includes many different applications for automotive, industrial and consumer applications. It encompasses a complex value chain from component providers up through end-device manufacturers, device management services, network service and application providers.

Two of the main challenges to the M2M industry are a lack of standards and complex revenue models for service providers.

Unlike the internet which is based on well-defined standards from TCP/IP on up to HTTP and XML, M2M systems have well-defined lower-layer protocols, but few at the application layer. Most implementations result in some level of proprietary technology. It is similar the numerous remote controls that you have in your living room, all based on the same signalling protocol, but each one dedicated to a specific device.

Standardisation of M2M protocols is a challenge that is now being addressed by ETSI. This is crucial to allow billions of machines to talk to each other and understand what is being said.

As for complex revenue models for service providers, carriers are used to billing for human voice and data traffic based on simple metrics such as duration and time of call, bytes transmitted, distance, or flat-rate subscription to mobile phone services or internet.

M2M devices act differently, typically utilising small amounts of application-specific data periodically. Unlike telephones or notebooks which can be bought anywhere and plugged into a network, M2M devices are very diverse, often proprietary, application-specific, and must be centrally managed.

The M2M device itself may be sold or rented by a system integrator and the connectivity supplied by a mobile (or virtual mobile) operator. Billing for M2M services will rely less on traffic generated or flat-rate tariffs, but rather on attributes such as provisioning

costs, cost per number of queries, device leasing, and use of applications that process collected data to provide a meaningful service.

M2M Now: What is u-blox's strategy for overcoming these barriers and assisting your clients?

TS: Our business strategy is based on three fundamental pillars.

Focus on what we do best: We concentrate on maintaining our position as a best-in-class provider of chips and modules based on in-house semiconductor and packaging IP. We focus our expertise on technologies where standards are carved in stone such as GSM, UMTS, CDMA as well as GNSS standards like GPS and GLONASS.

We make sure our devices meet the highest quality levels while offering compatibility with all global positioning and mobile communication standards. Our dual-track focus on wireless and positioning means we are also able to maximise their synergies resulting in unique, innovative features for our M2M customers.

Make it easy for customers to stay with u-blox:

We work hard to remain synchronised with our customer's innovation cycles by continuously introducing new features, while making it easy and cost-effective to upgrade their products with every new product generation. This philosophy can be best illustrated in our module form-factor continuity: we have established our MAX, NEO and LEA GPS/GNSS receiver module form factors as *de facto* industry standards. Each successive generation of product maintains footprint and pin-compatibility with previous generations.

On the wireless side, a similar philosophy is maintained between our SARA/LEON 2G and LISA 3G products lines: footprint compatibility is maintained across our GSM, UMTS, and CDMA modules. This results in lower costs for our customers as well as fast time-to-market.

Lastly, be a reliable supplier: We focus on running a successful and focused business. We have consistently met our revenue and profit targets for many years which has built significant confidence among our investors and our customers. Unlike some of our →



competitors, we have a very healthy financial position with solid reserves to insure we can react quickly to market and technology opportunities.

M2M Now: u-blox entered the wireless M2M arena comparatively recently, in 2009. Yet you've become a competitive player in a relatively short time. What do you put this down to?

TS: This is not entirely accurate; while our first wireless products were launched in 2009, our history as a leading vendor of GPS/GNSS chips and modules extends all the way back to 1997. Global positioning is the second pillar in M2M, and our long successful history in global positioning gives us the blueprint for replicating success in the wireless M2M markets. Our success can be attributed to a few core beliefs.

We give our customers a choice. Our products in both the GNSS and wireless domains provide a wide range of options including support of all global standards, basic or advanced features, multiple interfaces, package size, standard and automotive quality grades, as well as chip vs. module solutions. Our product portfolio gives our customers a wide choice of price / performance options. In this way, our customers are sure to find the optimal solution for their end-products.

Additionally, we maintain a strict non-compete policy with our customers and do not impose M2M services

on them. We believe there are many excellent players who focus on M2M services and that to be successful our customers should focus on best-in-class solution providers for each link of the M2M value chain.

We also react quickly to customer demands. u-blox started as a specialist in GPS receiver technology. We are currently on our seventh generation GNSS engine. In recent times, the M2M markets have moved quickly, meaning to keep pace we have expanded our know-how and portfolio rapidly through acquisitions.

Our recent acquisitions of NeonSeven (GSM/UMTS expertise, Italy), Fusion Wireless (CDMA expertise, California), 4M Wireless (4G stack specialist, UK) and Cognovo (4G modem specialists, UK) has quickly positioned us as a serious player in the wireless M2M markets.

Our business is growing strongly thanks to robust sales of our wireless modem products, usually in combination with our positioning products for M2M applications such as fleet management, a sector where we are the global leader. In a short time we have achieved impressive market penetration in all M2M sectors, a success that can be attributed to our early dominance in navigation applications, a market that is quickly being absorbed into the M2M sector.

And we stay close to our customers with the right knowledge. Our applications engineering →

**M2M Now
Jargon Buster**

CDMA = Code-Division Multiple Access

ETSI = European Telecommunications Standards Institute

GSM = Global System for Mobile communications

GNSS = Global Navigation Satellite System

GPS = Global Positioning System

HTTP = Hypertext Transfer Protocol

M2M = Machine-to-Machine

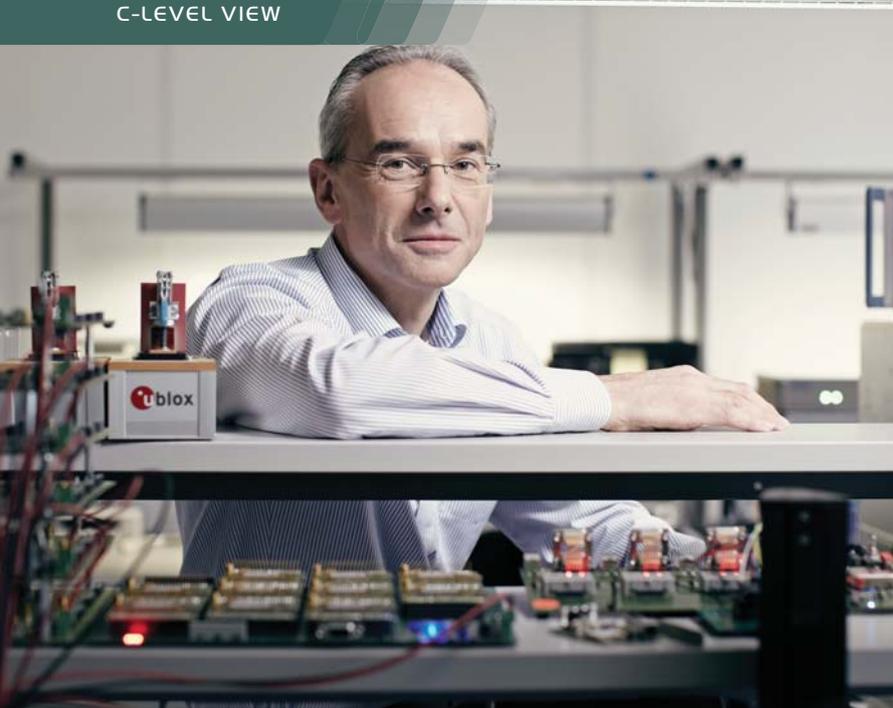
R&D = Research & Development

TCP/IP = Transmission Control Protocol/Internet Protocol

UMTS = Universal Mobile Telecommunications System

XML = Extensible Markup Language

Hiring top-talent is key to our success



know-how is one of our strengths. With thousands of customers worldwide, we can truly say 'we have seen it all'. Whether it's for extremely low-power personal tracker devices, automotive navigation and telematics applications or industrial automation, we have accumulated an enormous wealth of GNSS and wireless communications know-how.

This knowledge combined with our globally situated offices means we can be on-site with local u-blox experts to solve customer issues, usually within 24 hours. Unlike some of our competitors who delegate support to broad line distributors, u-blox maintains nine direct support offices and dedicated specialists on five continents.

M2M Now: In such a competitive market I guess innovation must be crucial. What factors help you innovate in products and services?

TS: Innovation at u-blox is based on three principles:

1. Hire the right people. With our location near to Switzerland's ETH, one of the world's top technical universities, we have easy access to some of the best and brightest minds. Indeed, u-blox was founded in 1997 by ETH Engineers, and our GNSS R&D centre in Thalwil has the feel of an advanced research institute.

We have also acquired some of the best talents in the industry from companies all over Europe as well as Asia and the Americas. With Switzerland, and particularly Zurich consistently winning the 'city with the highest quality of living' award, we also have little problem attracting top talent.

2. Establish a global team, close to our markets. Our R&D and customer support activities have spread around the world. In the wireless domain, we have established four centres of competence for embedded wireless R&D based on acquisitions. In doing so, we have quickly added a large team of more than 100

specialists in mobile communications who bring with them hundreds of man-years of experience.

3. Encourage cross-pollination of ideas: with a large team of specialists in both wireless and GNSS domains, u-blox maintains an internal 'Visionary projects' programme that fosters cross-pollination of ideas between technology centres. The goal is to bring our customers new and differentiating features that capitalise on the synergies between positioning and wireless communications.

M2M Now: What developments can we expect to see in the M2M market as a whole over the next few years, and in particular from u-blox?

TS: Low-bandwidth M2M applications of today will continue to grow until there are virtually no cars, vehicle fleets, public transportation systems, ships, containers or trains that are not equipped with M2M systems that monitor location, energy usage and efficiency while providing security for passengers and goods. The adoption of personal trackers is also growing fast: the monitoring of children, pets, elderly, sick or the rapidly growing population of persons with dementia will become common.

The extended future of M2M is clear: higher bandwidth applications. With the imminent deployment of 4G networks, M2M will expand far beyond the low-bandwidth requirements of fleet management or meter reading. Here are just 3 examples:

In **telehealth** with the patient/doctor ratio ever increasing, 4G networks will enable 'virtual presence' of healthcare providers to patients, no matter where they are located. High-quality video and audio, plus transmission of diagnostic information and patient history will routinely complement the visit to the doctor's office.

With the ability to carry five simultaneous High-Definition TV streams for **in-car entertainment**, passengers in every seat of the car will soon be able to watch their own independent content thanks to 4G technology.

With low-cost transmission of high-resolution video, the cost of **remote security** surveillance services will drop significantly as cameras can be placed anywhere and monitored by security personnel located thousands of kilometers away.

To meet the low-bandwidth M2M applications of today and tomorrow, u-blox already provides the right products that support all global GNSS and mobile communication standards.

To meet the high-bandwidth M2M applications of the near future, u-blox has positioned itself as a 4G player with the acquisitions of Cognovo and 4M Wireless. This will allow us to meet market demands for connected systems that require positioning, 4G connectivity and application specific functionality on a single integrated circuit. Expect the first 4G products in 2013. 



LISA is u-blox' flagship wireless module form factor that supports nested GSM/UMTS/CDMA designs that allow implementation of all mobile wireless standards on a single footprint

About u-blox Swiss-based u-blox (SIX:UBXN) is a global leader in 2G, 3G, and CDMA wireless modules and global positioning semiconductors for the consumer, industrial and automotive markets. u-blox provides a comprehensive line of form-factor compatible surface-mount modems supporting GSM, UMTS, and CDMA technologies. The company's recent acquisition of LTE chip technology positions u-blox as a 4G player in the M2M markets of the near future. With an industry-leading portfolio of GPS/GNSS receiver chips and modules, u-blox' products enable people, vehicles and machines to locate their exact position and wirelessly communicate via voice, text or video. With headquarters in Thalwil, Switzerland, u-blox is globally present with offices in Europe, Asia and the USA. (www.u-blox.com)



MobileCon™, October 9-11, 2012

What's in a name?

The CTIA's autumn show at San Diego Convention Center, California, has been re-branded as MobileCon™. Steve Rogerson looks at the reasons behind the change and the reactions from exhibitors.

In many parts of the world, MobileCon would sound like a show about mobile phones, but in the land of the cell phone the name suggests enterprise, which is good news for the CTIA as MobileCon is the new name for its autumn show. Previously called CTIA Enterprise & Applications, the US event aims to become more enterprise focused to the extent that some consumer exhibitors have been told they are no longer welcome.

The CTIA holds annual shows in both the spring and the autumn. The spring event, called CTIA Wireless, will for the time being at least stay as it is, a broad based event for the whole wireless industry. The autumn show though is now going to concentrate on enterprise services and applications. Although, as its previous cumbersome title suggested, this was always the intention, too many in the industry for the CTIA's liking just treated it in the same way as the spring show. Now, with a maturing of the enterprise market for mobile and M2M, the CTIA felt it was time to put its foot down.

"Last year, we saw some true meaningful deployment in the enterprise," said Robert Mesirow, vice president and show director for the CTIA. "We were seeing AT&T deploying in healthcare and in energy. There was a lot of focus on enterprise deployment."

He said that the organisation had been waiting for signs such as this. "We seized on it," he said. "Until then, the enterprise market had not matured enough."

This involved the drastic step of reducing the floor space of the exhibition by around 2,100 sq ft and telling some exhibitors there that they no longer fitted the profile of the show.

"We had an area of the show floor that was a wireless dealer expo," he said. "These were accessories and end-user gadgets. We moved some exhibitors that were inappropriate out of the event." He described the response from those exhibitors as "understanding" and believed they would still attend the spring event.

As to the choice of name, Mesirow explained why he felt MobileCon felt more enterprise based than a show with the word "enterprise" in the title. "When we used the word 'enterprise' it was more restrictive than broad," he said. "We suggested various names to people, and the response saw MobileCon off the chart. We were delighted and surprised that the name was available."

Focus on enterprise mobility

Mike Ueland, senior vice-president and general manager at **Telit Wireless**, added: "The choice of MobileCon as a name says that they are trying to focus more on the mobility needs of enterprises."

And Daria Biernat, business development manager at **7 Layers**, was more than happy with the new name. "I think the re-branding is great," she said. "The name is a lot more simple and clean, and it gives a very positive image in most people's minds. We use the word mobile to mean mobile health, so I hear the word all the time."

But Herbert Blaser, vice-president of business marketing at **u-blox**, said: "To me, the name is not so important. I think the re-branding is OK. What is important is who shows up and what discussions we will have at the show."

Satish Ram, global product line manager for M2M and digital signage at **Kontron**, said: "The MobileCon re-brand will drive home the fact that →



Robert Mesirow, CTIA: I have been blown away by the positive comments



Herbert Blaser, u-blox: To me, the name is not so important



Mike Ueland, Telit: We are trying to build our ecosystem with M2M

“So what if I have a few less exhibitors or attendees, all I care about is I have the right people.”

Robert Mesirow, CTIA

Mobile **CON**™

Powered by **CTIA**



Nigel Chadwick, Stream Communications: We are not going to be at the show

this show is about mobile and communications. This is a step in the right direction. It has become more enterprise focused, so that makes sense.”

Mesirow said he had not heard any negative reaction to the re-branding. “I have been blown away by the positive comments and unsolicited phone calls and emails, and by the number of companies stepping up their presence,” he said. “People are increasing their space and those that were sitting on the fence are committing.”

Ueland agreed. “For us, it is a positive move,” he said. “A lot of our activity is around enterprise and business. We are not selling directly to consumers.”

handsets and the like, but even then in the M2M Zone people are interested in M2M,” he said.

Biernat added: “The spring show is much larger. It is not as focused.”

Telit will also again be holding its own developers conference on the Monday, the day before the show starts. “This is an opportunity for our customers and their developers to come and learn what’s new with Telit,” he said. “It was the inaugural show last year and was a great event. It lets us talk with technical people at our customers. We are trying to build our ecosystem with M2M and that event lets us do that.”



Daria Biernat, 7 Layers: The name is a lot more simple and clean

Almost a new show?

Mesirow sees the re-launch as a fresh beginning for the show and is talking about it as a new event rather than an old show with a different name, but he knows that a lot of people will be ready to judge what they have done at the actual event, which will be held in San Diego from 9 to 11 October, 2012.

“The most important thing for this year as the first year is to get the right people there,” he said. “All the big US carriers are in place. This is really set to be a pure mobile IT environment. So what if I have a few less exhibitors or attendees, all I care about is I have the right people. We are trying to bring the right people together to develop a market place.”

But not everybody has been attracted by the new image. Nigel Chadwick, founder and director of **Stream Communications**, will not be making the journey. “We are not going to be at the show,” he said. “The European and UK market is so strong at the moment, going there is a stretch that we don’t really want to take.”

Not all Europeans agree, as can be shown by the Croatian pavilion that has been planned. “Croatia is extremely active in the mobile IT space,” said Mesirow. “They are one of the ones to watch.”

This year, Biernat is hoping for more of the same in terms of visitors. “Last year, we got a lot of traffic,” she said. “I was surprised by the number of people who explored all the booths. There were people ticking them off. Until we get there this time, it will be harder to see the real changes. It takes a little time to get re-branding right, but it looks like they have a plan that is going to be successful.” ★



Satish Ram, Kontron: A key venue for us to showcase our M2M products

And he predicted that next year’s event would be twice the size of this year’s show.

For Blaser, the key will be whether he can find new business. “We want to increase our presence in the market and meet some potential customers,” he said. “The more people it attracts, the better it is for us.”

Kontron is planning to have a model of a building on its stand (pictured) that will use an M2M device to connect to the various sensors in the building. Satish Ram added: “(MobileCon) is going to have quite a few CTIA related exhibitors such as carriers and ecosystem people, so it is a pretty key venue for us to showcase our M2M products.”

As to the big issues for this year, the hot topic, Mesirow said, was the bring-you-own-device (BYOD) trend for company IT people. Security, he said, will also be big as well as mobile convergence, M2M, mobile health and mobile commerce.

Different shows

Ueland said he did not see much difference between the spring and autumn shows as Telit’s stand was in the M2M Zone and the visitors who came into that section were primarily interested in M2M. “The spring show has been more focused on





Event Diary

Don't forget to add the following events to your organiser. As *M2M Now* is Official Media Partner for most of these events, we look forward to seeing you there.

Smart Homes 2012

October 9-11, 2012
Amsterdam, Netherlands
www.smarthomes2012.com

Metering, Billing/CRM Europe

October 9-11, 2012
Amsterdam, Netherlands
www.metering-europe.com

M2M Zone Conference & Pavilion MobileCON™

October 9-11, 2012
San Diego, CA, USA
www.mobilecon.com

GridComms

October 22, 2012
Sheraton Park Lane Hotel, London, UK
www.gridcomms.com

AfricaCom

November 13-15, 2012
CTICC Cape Town, South Africa
<http://africa.comworldseries.com/>



ICI Meeting 2012

Innovations in Cardiovascular Interventions
December 2-4, 2012
Tel Aviv, Israel
www.icimeeting.com/

2013

M2M World Asia

co-located with The Internet Show
April 24-25, 2013
Suntec, Singapore
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M2M Now has recently published the most comprehensive Online Directory of companies involved in machine-to-machine communication services worldwide. These include: Application Developers, Connectivity Providers, Module & Terminal OEMs, Device & Component Manufacturers, Gateway & Router Suppliers, Platform Providers, System Integrators, Analysts & Consultants. Any organisation directly involved in M2M and connected devices can be listed.

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Insurers using cameras to monitor drivers



Oliver Philippou is a Video Surveillance and VCA analyst at IMS Research, recently acquired by HIS. oliver.philippou@ihs.com

“At a cost of around €315 for the camera, this may put some end-users off.”
Oliver Philippou, IHS

I recently read a news article on the BBC's website* about how car insurers are offering young drivers the opportunity to install a surveillance camera in their car, and in exchange receive a discount of 15% on their insurance. However, this is not a new idea, writes *Oliver Philippou*. So why isn't this common practice by insurance companies already?

The use of cameras onboard commercial vehicles in exchange for reduced insurance premiums has been common practice in the USA for many years. Traditionally, whether it is a taxi, bus, or train, onboard video surveillance systems have been used to protect passengers, staff and the vehicles themselves against acts of crime and anti-social behaviour.

However, another key benefit of onboard video surveillance is to monitor the passengers and drivers for legal mitigation or protection. There is a strong case for companies installing onboard video to protect themselves or their drivers against liability cases and frivolous laws suits. This is common practice in the commercial world of commuter buses and road freight, especially in the USA, and is becoming more common in the UK as well.

Mobile video surveillance is also used in fleet management and driver management solutions. These systems can track vehicle location and speed. An accelerometer triggers the video recording when an incident, such as a sharp turn, a crash,

sudden acceleration or deceleration happens. The solution is normally set to record for a short period of time before, during and after the event.

Altering drivers' behaviour

The main aim of these solutions is to alter a driver's behaviour, to improve driving style and reduce risk of accidents. Not only does this reduce insurance premiums, but as drivers know they may be being watched, they tend to drive more calmly. This also offers financial benefits such as, increased fuel efficiency and decreased maintenance bills.

So why is it not being used more commonly in other markets? It is surprising that fleet management companies, car insurance campaigners, road safety campaigners, and camera manufacturers have not lobbied more rigorously for this.

At a cost of around €315 for the camera, this may put some end-users off. However, compared to the potential reduction in insurance premiums this could offer a significant return on investment for younger drivers.

* www.bbc.co.uk/newsbeat/18191681



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