

# Machina Research



IoT Week Belgrade  
May 31<sup>st</sup> - June 2<sup>nd</sup>, 2016

## INDUSTRY DAY - Welcome

**Emil Berthelsen, Principal Analyst**  
**Crowne Plaza Hotel, Belgrade, Serbia**  
**June 1, 2016**

# Some of our clients



Leading Innovation >>>

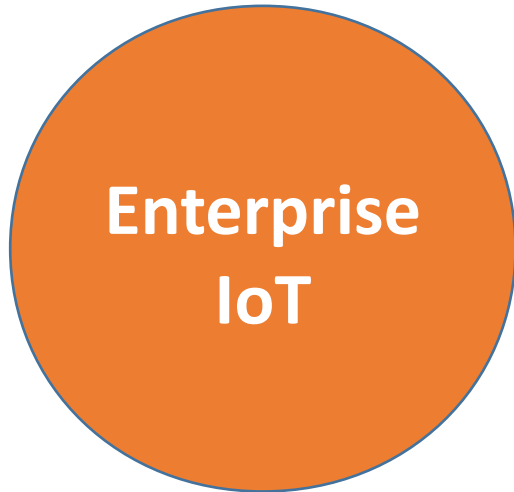


# Four IoT technology vectors which are transforming markets and behaviours

Source: Machina Research, 2016

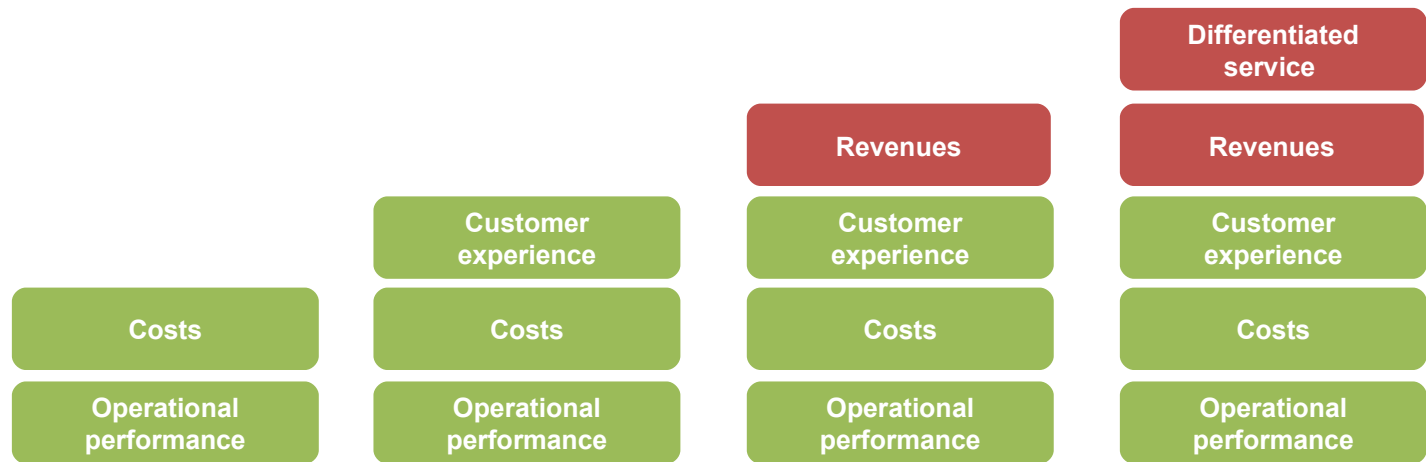
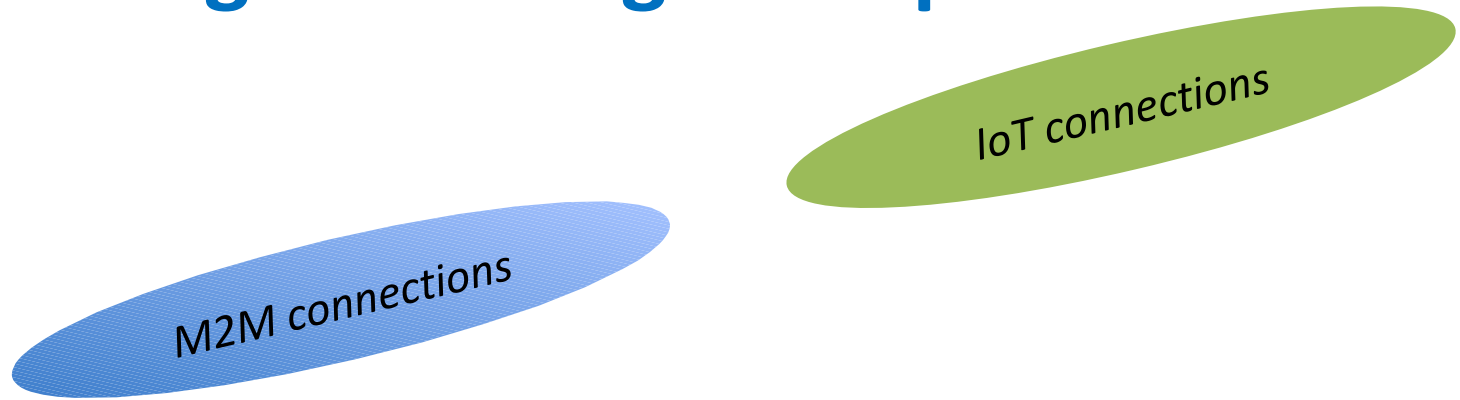
**These transformations include fundamental industry disruptions and new alignments**

**Impact will be pervasive: in products, process,  
people, performance, platforms & partners**



Source: Machina Research, 2016

# How M2M and IoT have evolved, and how IoT enabling technologies displaces M2M



# M2M and IoT will transform many industries and will impact all businesses

## Machine-to-machine (M2M)

Connections to remote sensing, monitoring and actuating devices, together with associated aggregation devices (Machina Research, 2011)

## Internet of Things (IoT)

Internet of Things (IoT) is the network of physical objects or things, digitalising information about the environment, and exchanging that data across the existing internet structure.

## Consumer IoT

Smarter, connected consumer products, capturing, sharing and processing data for consumer benefits. Wearables, smart home devices, and so on.

## Industrial IoT

An internet of things, machines, computers and people enabling intelligent industrial operations and using advanced data analytics for transformational business outcomes. (IIC, 2015)

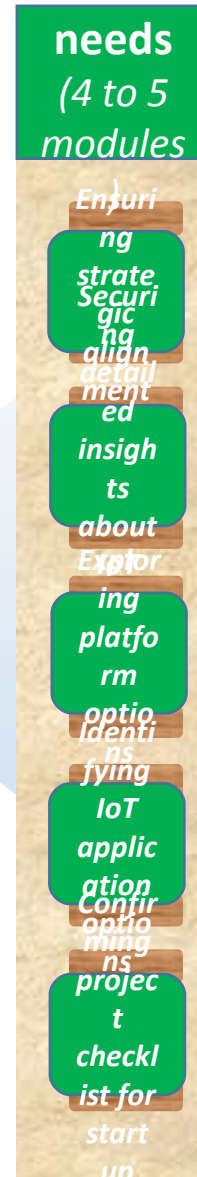
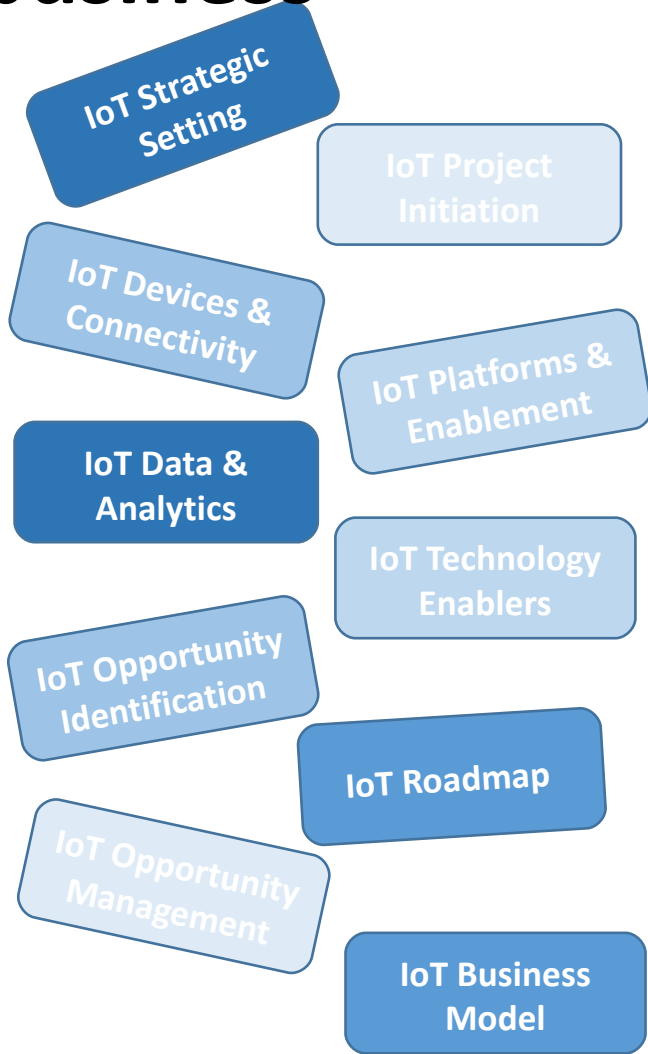
## Industrie 4.0

Smart industry or “INDUSTRIE 4.0” refers to the technological evolution from embedded systems to cyber-physical systems networked with IoT and IoT services in design, manufacturing and management of products.

## Enterprise IoT

Smarter, connected industrial devices and products, capturing, sharing and processing data about the environment, and integrating this analysed data in enterprise architectures and systems. (Machina Research, 2016)

# Workshop configured to the needs of your business





# Thank you.



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**Emil Berthelsen**  
**Principal Analyst**  
emil.berthelsen@machinaresearch.com

# Introducing Machina Research

# About Machina Research

- **Machina Research is the world's leading provider of market intelligence and strategic insight on the rapidly emerging Machine-to-Machine (M2M), Internet of Things and Big Data opportunities.**
- **We provide market intelligence and strategic insight to help our clients maximise opportunities from these rapidly emerging markets. If your company is a mobile**

# Machina Research's Thought Leaders



**Jim Morrish**  
**Founder & Chief Research Officer**  
Enterprise IoT, M2M application software, M2M & IoT platforms



**Godfrey Chua**  
**Principal Analyst**  
Americas, carrier strategies, industrial, connected home and workplace



**Margaret Ranken**  
**Principal Analyst**  
Connected home, connected buildings, smart cities



**Jeremy Green**  
**Principal Analyst**  
Smart Cities, M2M and IoT technology ecosystem, key IoT players



**Isabel Chapman**  
**Principal Analyst**  
Enterprise IoT, software and middleware platforms



**Emil Berthelsen**  
**Principal Analyst**  
Enterprise IoT, big data, mobile enterprise application platforms, procurement, SLAs, QoS



**Aapo Markkanen**  
**Principal Analyst**  
Access network technologies, Low Power Wide Area (LPWA)



**Matt Hatton**  
**Founder & Chief Executive Officer**  
Operator M2M and IoT strategies, channels, M2M technologies, regulation



**Andy Castonguay**  
**Principal Analyst**  
Americas, M2M/IoT devices & modules, wearables, healthcare



**Gwenn Larsson**  
**Principal Consultant**  
Enterprise IoT consulting



**Emma Buckland**  
**Principal Analyst**  
M2M forecasts, consumer electronics, connected living, regulation



**Phil Todd**  
**Director of Research**  
IoT research content management

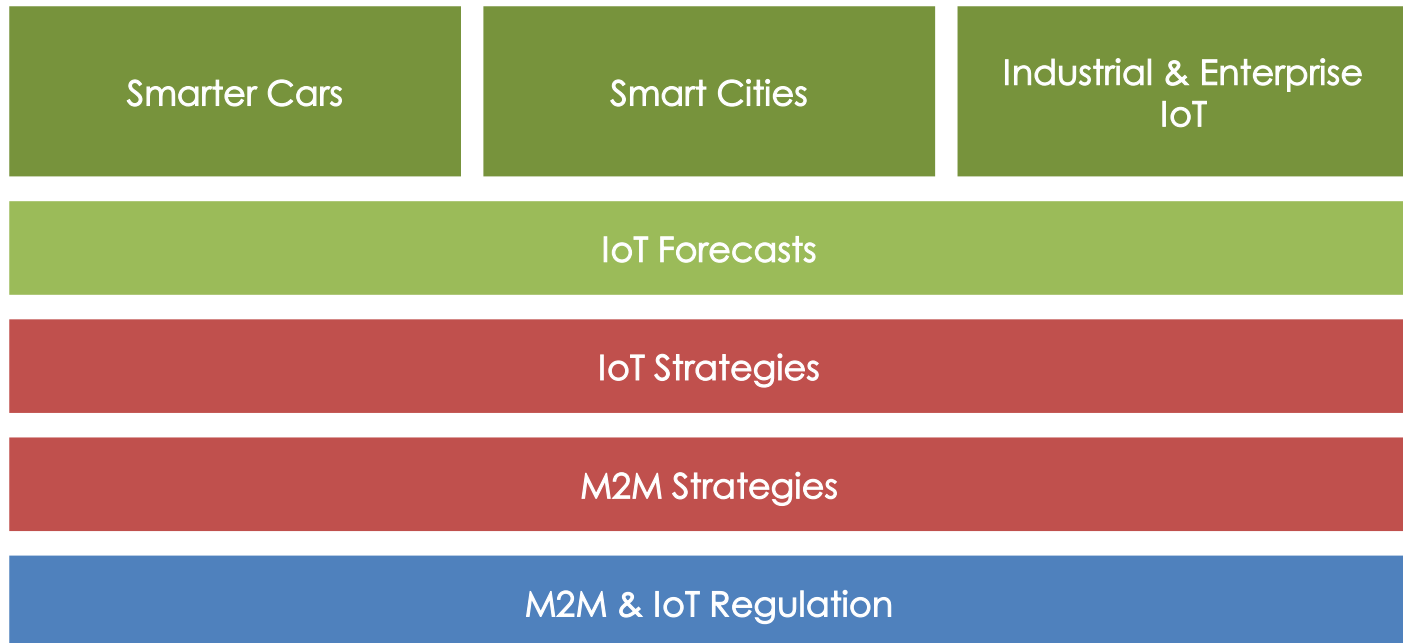


**Matt Arnott**  
**Analyst**  
IoT forecasts and application spotlights

# Advisory Service Research Streams

## The Machina Research Advisory Service Comprises 7 Research Streams

- M2M Strategies and IoT Strategies pull together our horizontal expertise, supported by M2M & IoT Regulation
- Forecasts and application analysis for our five 'Connected' verticals (Cars, Cities, Health, Industry and Living & Working) consolidated in the IoT Forecast Research Stream
- Smarter Cars, Smart Cities and Industrial & Enterprise IoT Research Streams delve deep into addressing the requirements, opportunities and challenges of car manufacturers, city managers and enterprises as they deploy IoT



# Research Streams



## IoT Strategies

Analysis of the evolution and impact of the emerging concept of the Internet of Things. Topics covered include software platforms, application development, data management, machine learning, monetisation, trusted third parties and key players in this new emerging field.



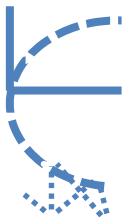
## M2M Strategies

Covering commercial and technical best practice in all aspects of the provision of connected solutions, including devices, networks and service providers. Covers topics such as new technologies, Communications Service Provider strategies, standards, value chain positioning, pricing and M&A.



## M2M & IoT Regulation

Country-by-country analysis of the regulatory issues relevant to M2M and IoT. Each country profile examines issues such as licensing, roaming (including permanent roaming), numbering, spectrum availability, and data sovereignty. Also includes analysis of overall trends.



## IoT Forecasts

Our comprehensive quantitative guide to the growth of the Internet of Things, featuring forecasts of connections, technology, traffic and revenue for 200 countries across all 57 application groups covered in our 5 'Connected' verticals: Cars, Cities, Health, Industry and Living & Working.



## Industrial & Enterprise IoT

Examines how enterprises should prioritise and approach selecting and implementing IoT applications and solutions in various domains. Explores the potential partnerships and collaborations, enabling (data) technologies and protocols, and how enterprises can secure IoT solutions with SLAs.



## Smart Cities

Looks at smart city initiatives from the perspective of the would-be user. Provides city managers with analysis of smart cities overall, recommendations over thresholds and context for deployment of different smart city applications, best practice for implementation and case studies of deployments.



## Smarter Cars

Focuses on key issues for the evolving connected car, including analysis of operating systems, OEM strategies, new business models, alternative vehicle-related applications and new developments such as autonomous driving.