

Trends in M2M Technology

Talking with technologists and product managers, it is becoming clear that technological hurdles are not preventing the broad adoption of M2M. Rather, it is the business and operational challenges that are delaying widespread adoption of this strategy. In this research report, the focus is on the trends in M2M in specific industry verticals today. Things are coming to market soon that even science fiction couldn't predict. It's no longer a matter of how to do it, it's a matter of why.

Every day, announcements of a new wearable device that will make us healthier pop up but most of these devices are still in laboratories and universities or relatively expensive if available to the market. Will one hacked heart monitor or faulty connected car system derail the broad adoption of M2M? Will consumers choose to spend more on the newest gaming console or video technology instead? AT&T debuted the Picturephone in 1964 but it took more than 40 years for that technology to become common place because the value proposition wasn't clear to the consumer. And yet, in 2013, McKinsey Global Institute published a report that predicts the Internet of Things will have a global economic impact of between \$2.7 and \$6.2 trillion USD annually.

In numerous surveys, Communication Service Providers (CSPs) insist that bringing new products to market faster is their primary objective. Yet, all those new products require definition, branding, pricing, sales training, and management. All those new products also create a lot of noise and confusion for the customer. Being able to stand out in the marketplace is a challenge. Delivering profitable M2M services to businesses and consumers requires automated operational processes, self-provisioning, and seamless end-to-end management. Building brand trust and creating differentiation will require collaboration between suppliers, providers, and customers. The market is so vast and moving so quickly that everyone in the value chain must maintain focus in order to stand out in the crowd.



But who owns the customer? Who is liable in case of a device or system failure? Will the customer be given the option to “opt-out” in the case of the connected car? The data passing through the network may be a source of innovative income for the CSP but the CSP does not own all of the data. Does the CSP have the right to mine that data and monetize it? The business models, products, services, and support strategies for M2M are unlike anything that CSPs have brought to market in the past and require a different set of processes, tools, and techniques to ensure success.

As a society, there will be discussions about safety, security, and privacy. There are human issues of privacy, ethics, security, and more when discussing the dissemination and use of personal data and those issues may well limit the widespread adoption of some M2M solutions, but the technology exists and even though the roll out of M2M has been slower and more deliberate than predicted – it will happen.

This second paper in the M2M series focuses on trends in technology and is based on interviews with decision makers from the market leaders in the M2M space. The second paper includes:

- What is coming to market;
- What changes will be needed to make this happen; and
- How do these changes mesh with existing product portfolios?

The focus of third paper of the trilogy will be on best practices of M2M providers and implementations and include case studies from specific vertical market segments, with some unexpected results.

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