

Index

Table of Contents

Table of Contents.....	i
List of Figures.....	vi
Executive summary.....	1
1 Wide area networks for the Internet of Things.....	3
1.1 3GPP family of cellular technologies.....	3
1.1.1 3GPP Release 13 – Introducing LTE-M and NB-IoT	4
1.1.2 3GPP Release 14 – IoT enhancements and V2X.....	5
1.1.3 3GPP Release 15 – The first 5G specifications	6
1.1.4 Network footprint.....	6
1.2 LPWA and satellite technologies	11
1.2.1 LoRa	11
1.2.2 Sigfox.....	14
1.2.3 Satellite networks	16
1.3 IoT networking platforms.....	17
1.3.1 IoT connectivity management platforms.....	17
1.3.2 SIM solutions and embedded UICC	20
1.4 International coverage and alliances.....	22
1.4.1 Roaming and international coverage	22
1.4.2 Mobile operator alliances	23
2 Europe	27
2.1 Regional market trends	27
2.1.1 Western Europe.....	29
2.1.2 Regional market trends in Western Europe	32
2.1.3 Central Eastern Europe.....	39
2.1.4 Russia & CIS.....	39
2.2 Mobile operators.....	40
2.2.1 Vodafone	41
2.2.2 Deutsche Telekom	44

2.2.3	Telefónica	47
2.2.4	Orange.....	50
2.2.5	Telenor	52
2.2.6	3 Group Europe.....	54
2.2.7	A1 Telekom Austria	55
2.2.8	Bouygues Telecom	57
2.2.9	BT Group	58
2.2.10	JT Group.....	59
2.2.11	KPN	59
2.2.12	MegaFon	60
2.2.13	MTS	61
2.2.14	POST Luxembourg.....	62
2.2.15	Proximus.....	62
2.2.16	SFR.....	63
2.2.17	Telecom Italia	64
2.2.18	Telia Company	65
2.2.19	Tele2.....	66
2.2.20	UtilityConnect	67
2.3	IoT managed service providers	67
2.3.1	Arkessa.....	68
2.3.2	Com4.....	68
2.3.3	Cubic Telecom	68
2.3.4	EMnify.....	69
2.3.5	Eseye.....	70
2.3.6	Sierra Wireless.....	71
2.3.7	Stream Technologies	72
2.3.8	Telit.....	73
2.3.9	Wireless Logic	74
2.3.10	Others.....	75
2.4	LPWA networks.....	76
2.4.1	LoRa networks.....	76
2.4.2	Sigfox and network partners	77

- 3 The Americas 79
 - 3.1 Regional market trends 79
 - 3.1.1 United States and Canada 81
 - 3.1.2 Brazil 83
 - 3.1.3 Rest of Latin America 85
 - 3.2 Mobile operators..... 85
 - 3.2.1 AT&T..... 85
 - 3.2.2 Verizon..... 88
 - 3.2.3 Sprint 89
 - 3.2.4 T-Mobile USA 90
 - 3.2.5 Rogers Communications..... 91
 - 3.2.6 Bell Canada..... 92
 - 3.2.7 América Móvil 92
 - 3.2.8 Vivo and Telefónica Latin America 93
 - 3.2.9 Other mobile operators in Latin America 94
 - 3.3 IoT managed service providers 96
 - 3.3.1 Aeris Communications 96
 - 3.3.2 KORE Wireless 97
 - 3.3.3 Numerex 99
 - 3.4 Satellite networks..... 99
 - 3.4.1 Orbcomm 100
 - 3.4.2 Inmarsat..... 101
 - 3.4.3 Iridium..... 103
 - 3.4.4 Globalstar 103
 - 3.5 LPWA networks..... 104
 - 3.5.1 LoRa networks..... 105
 - 3.5.2 Sigfox and network partners 105
- 4 Asia-Pacific..... 107
 - 4.1 Regional market trends 107
 - 4.1.1 China 109
 - 4.1.2 Japan and South Korea 112
 - 4.1.3 Australia and New Zealand 113

4.1.4	Southeast Asia	114
4.1.5	India and South Asia	115
4.2	Mobile operators.....	116
4.2.1	China Mobile	116
4.2.2	China Unicom.....	118
4.2.3	China Telecom	119
4.2.4	Softbank	120
4.2.5	NTT Docomo	121
4.2.6	KDDI	122
4.2.7	SK Telecom	123
4.2.8	KT	124
4.2.9	Singtel.....	124
4.2.10	Telstra.....	126
4.3	IoT managed service providers	127
4.3.1	Soracom	127
4.3.2	Unlimit.....	127
4.4	LPWA networks.....	128
5	Middle East & Africa.....	131
5.1	Regional market trends	131
5.1.1	Middle East.....	132
5.1.2	Africa.....	133
5.2	Mobile operators.....	134
5.2.1	Etisalat	134
5.2.2	FastNet	135
5.2.3	Ooredoo	136
5.2.4	MTN	137
5.2.5	Turkcell.....	137
5.2.6	Vodacom	138
5.2.7	Zain.....	138
5.3	LPWA networks.....	139
6	Market forecasts and trends	141
6.1	Geographic markets.....	141

- 6.1.1 Global market summary 144
- 6.1.2 Europe 147
- 6.1.3 North America 149
- 6.1.4 Latin America 151
- 6.1.5 Asia-Pacific 153
- 6.1.6 Middle East & Africa 155
- 6.2 Vertical markets 157
 - 6.2.1 Connected cars reach an inflection point 159
 - 6.2.2 Steady growth in the fleet management industry 160
 - 6.2.3 Governments and utilities leverage IoT to address critical challenges..... 162
 - 6.2.4 Industry 4.0 gains momentum 163
 - 6.2.5 Redefining consumer experiences through connectivity..... 164
- 6.3 Technology trends..... 165
 - 6.3.1 China’s economic planning will make 2G obsolete by 2020..... 165
 - 6.3.2 Global sunset for 2G/3G networks ahead..... 166
 - 6.3.3 Network virtualisation decouples cellular IoT from physical infrastructure..... 167
- 6.4 Industry trends..... 167
 - 6.4.1 China Mobile first to reach 100 million cellular IoT subscribers 168
 - 6.4.2 IoT accounts for less than 1 percent of mobile operator revenues 169
 - 6.4.3 IoT managed service providers focus on high-end segments and platforms .. 170
- Glossary 173

Index

List of Figures

Figure 1.1: Comparison of LTE MTC enhancements in 3GPP Release 13	5
Figure 1.2: LTE-M network deployment plans (Q3-2017)	9
Figure 1.3: NB-IoT network availability by country (Q3-2017)	10
Figure 1.4: Examples of network operators deploying LoRaWAN	13
Figure 1.5: Sigfox network operators by country	15
Figure 1.6: MSS operator data services and coverage	17
Figure 1.7: MNO IoT connectivity management platform, by vendor (Q2-2017)	18
Figure 1.8: Mobile operator M2M/IoT alliances (Q2-2017)	23
Figure 2.1: Europe cellular IoT connectivity market data (Q2-2017)	28
Figure 2.2: Western Europe cellular IoT connectivity market data (Q4-2016)	31
Figure 2.3: Italy cellular IoT connectivity market data (2016–2017)	33
Figure 2.4: France cellular IoT connectivity market data (2013–2017)	34
Figure 2.5: Germany cellular IoT connectivity market data (2014–2017)	34
Figure 2.6: UK cellular IoT connectivity market data (2013–2016)	35
Figure 2.7: Spain & Portugal cellular IoT connectivity market data (2014–2017)	36
Figure 2.8: Benelux cellular M2M market connectivity data (2014–2017)	37
Figure 2.9: Nordics cellular M2M market connectivity data (2013–2016)	37
Figure 2.10: Central Eastern Europe cellular IoT connectivity market data (Q4-2016)	38
Figure 2.11: Russia & CIS cellular IoT market connectivity data (2013–2017)	39
Figure 2.12: Telefónica M2M subscribers by country (2016–2017)	49
Figure 2.13: Orange M2M subscribers by country (2015–2017)	52
Figure 2.14: Financial data for Telenor Connexion (2011–2017)	53
Figure 2.15: A1 Telekom Austria M2M subscribers by country (2016–2017)	56
Figure 2.16: LoRa network operators Europe (Q4-2016)	77
Figure 2.17: Sigfox network partners in Europe (Q2-2017)	78
Figure 3.1: The Americas cellular IoT connectivity market data (Q2-2017)	80
Figure 3.2: US cellular IoT connectivity market data (2013–2017)	81
Figure 3.3: Brazil cellular M2M market connectivity data (2014–2017)	83

Figure 3.4: Estimated number of M2M subscribers in Latin America ex. Brazil (H1-2017)	84
Figure 3.5: Telefónica M2M subscribers in Latin America by country (2014–2017)	94
Figure 3.6: Satellite network operators by IoT subscriber base (Q3-2017)	100
Figure 3.7: LPWA network operators in the Americas (November 2017)	106
Figure 4.1: Asia-Pacific cellular IoT connectivity market data (Q2-2017)	108
Figure 4.2: Japan cellular IoT connectivity market data (2013–2017)	112
Figure 4.3: Cellular IoT subscribers by application category (South Korea, August 2017) ...	113
Figure 4.4: Planned LPWA network rollouts in Asia-Pacific (November 2017)	129
Figure 5.1: Middle East & Africa cellular IoT connectivity market data (Q2-2017)	131
Figure 5.2: Turkey cellular M2M market connectivity data (2014–2017)	132
Figure 5.3: Planned LPWA network rollouts in Middle East & Africa (November 2017)	140
Figure 6.1: Key regional markets for cellular IoT (Q2-2017)	142
Figure 6.2: Monthly ARPU data for cellular IoT by country (2016)	143
Figure 6.3: Cellular IoT subscriber forecast, by region (World 2016–2022)	145
Figure 6.4: Cellular IoT network revenue forecast, by region (World 2016–2022)	146
Figure 6.5: Cellular IoT communication market forecast (Europe 2016–2022)	148
Figure 6.6: Cellular IoT communication market forecast (North America 2016–2022)	150
Figure 6.7: Cellular IoT communication market forecast (Latin America 2016–2022)	152
Figure 6.8: Cellular IoT communication market forecast (Asia-Pacific 2016–2022)	154
Figure 6.9: Cellular IoT communication market forecast (MEA 2016–2022)	156
Figure 6.10: Cellular IoT communication market forecast, by vertical (2016–2022)	158
Figure 6.11: OEM telematics attach rates in new vehicles, by region (2016/2021)	159
Figure 6.12: Top 25 international providers of fleet management solutions (Q4-2016)	161
Figure 6.13: Projected smart meter penetration in key markets (2023)	162
Figure 6.14: NB-IoT device shipments and installed base forecast (China 2017–2020)	166
Figure 6.15: Top 10 mobile operators by cellular IoT subscriber base (World Q2-2017)	168
Figure 6.16: Annualised IoT revenues for mobile operator groups (2016/2017)	169
Figure 6.17: Major IoT managed service providers by subscriber base (H2-2017)	171

