Asia Growth Opportunities
for
IOT & M2M MVNOs

16^h July 2015

About MY Evolution

First M2M MVNO in Asia

Celebrating 6th year

Served near to 200 B2B

Operating across 4 countries

- We support IOT & M2M initiatives with specifically adapted **Machine-to-Machine Services**, **Global Data Access** and **Connectivity Solutions**

- With IOT & M2M *Services & Solutions*, our business partners can manage efficiently communication between their IT systems and remote communicating devices

MY Evolution is a **dedicated M2M Telecom Service Operator** operating across Asia

Business Model

MY Evolution is an Asian MVNO that provides
IOT & M2M solutions in Emerging Markets
We are not a Telco, we are not an SI, we are both.

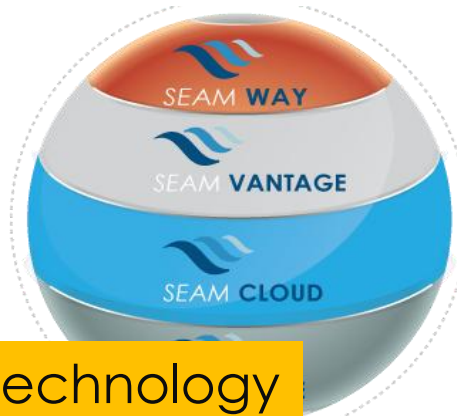Historically, the company derives revenues from the following streams :

M2M Data & SMS Management	M2M Asset Management & Connectivity	M2M Solution Enablement
MVNO	**Technology**	**SI**

What's is the trick ?

Change this Model

To this Model

High ARPU $15
Low SAC

High Churn (Months)
Low Margin (Resell)

Low ARPU $2
High SAC

Low Churn (Years)
High Margin (IT)

Lean Organization

Lean Organization

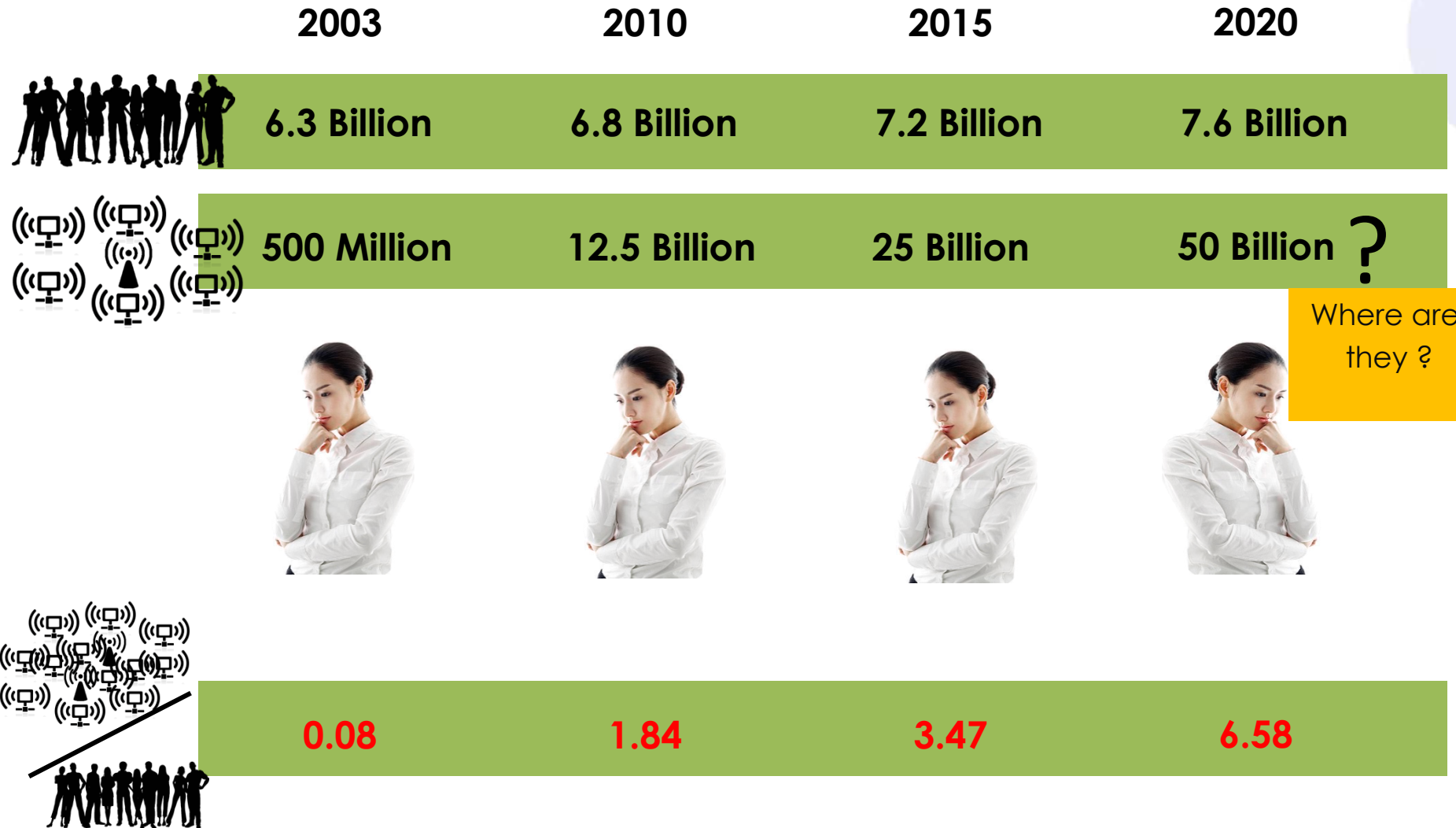MVNO

M2M

IOT Growth Areas

Connected Devices Market

	2003	2010	2015	2020
	6.3 Billion	6.8 Billion	7.2 Billion	7.6 Billion
	500 Million	12.5 Billion	25 Billion	50 Billion **?**

Where are they ?
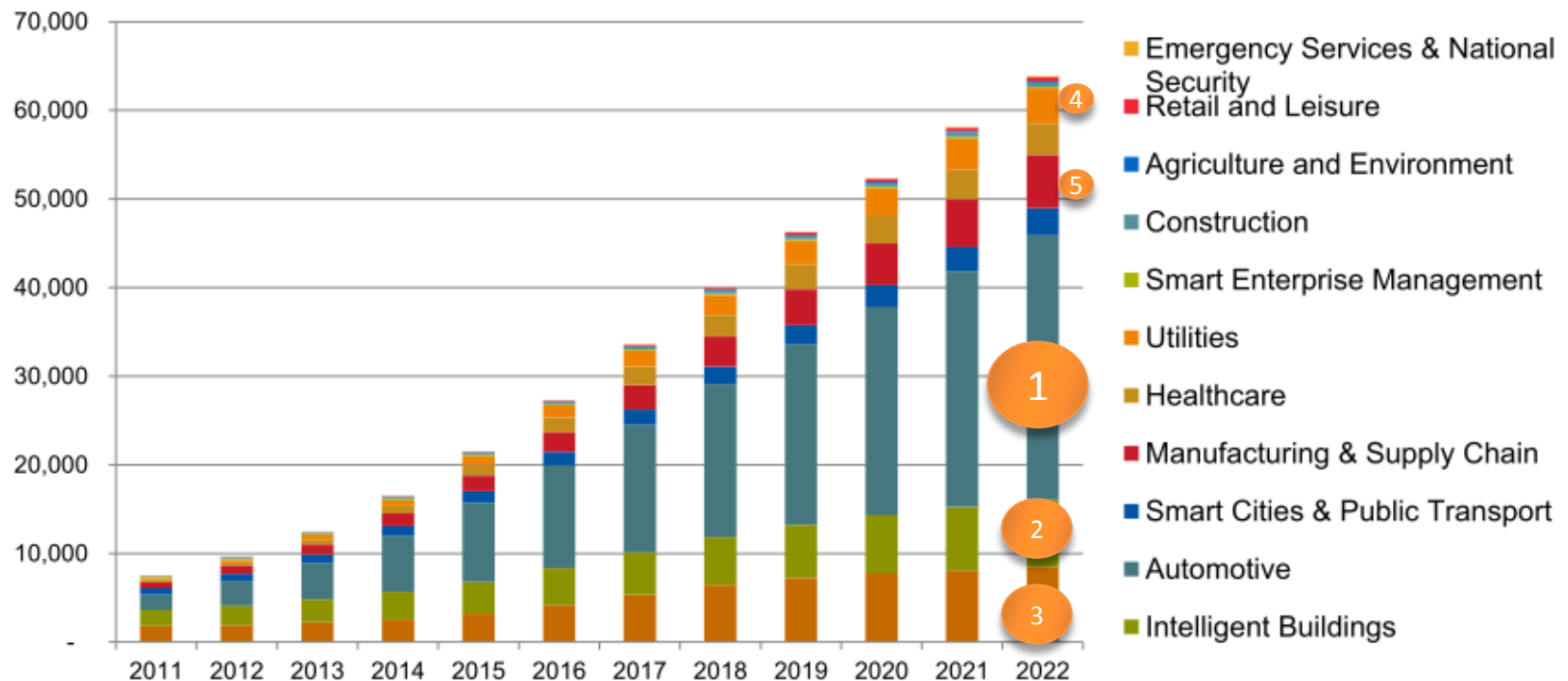
	0.08	1.84	3.47	6.58

Source : Cisco IBSG

Figure 1: Global M2M connections 2011-22 by technology [Source: Machina Research, 2012]
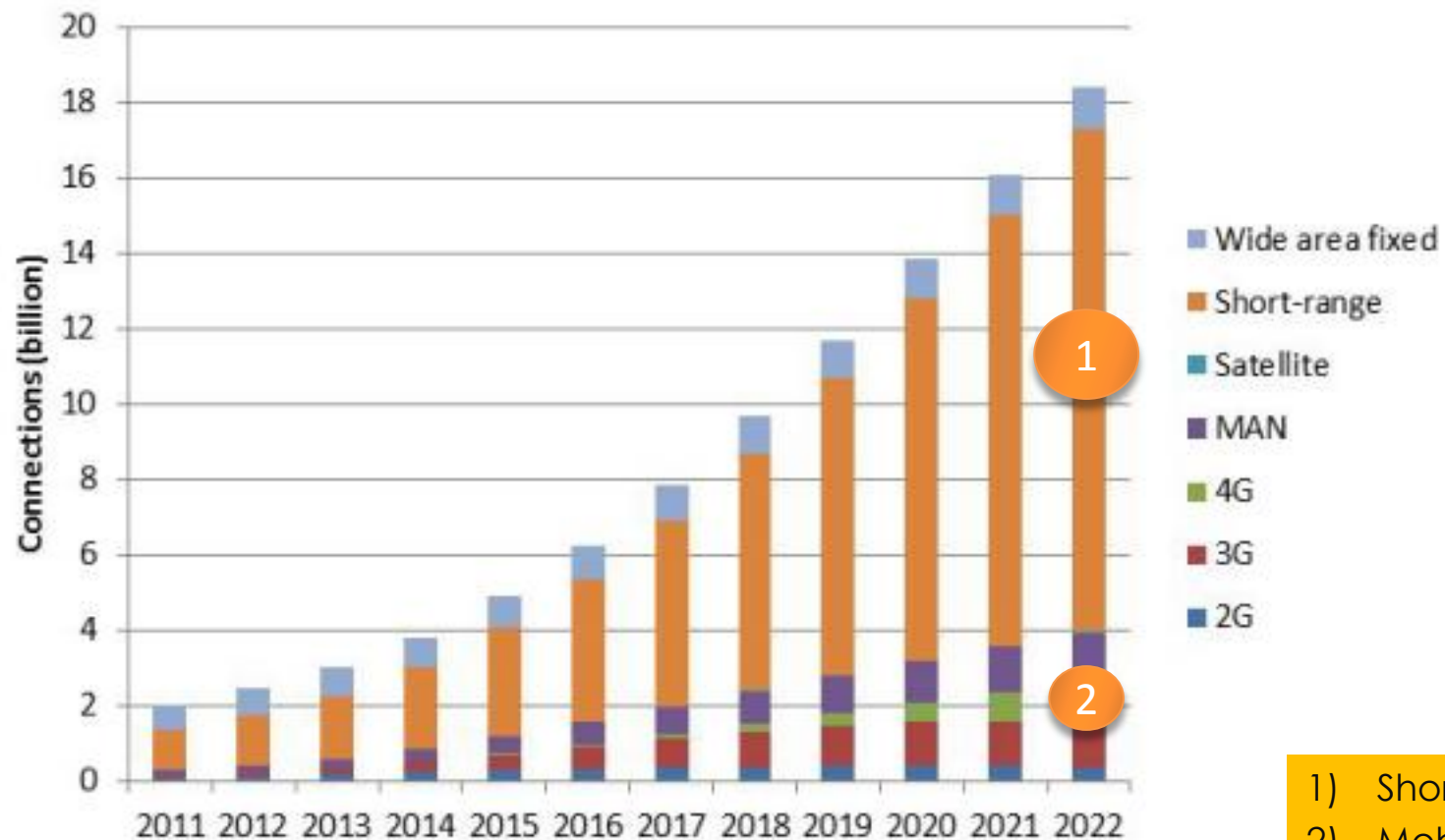
For what Revenue

M2M- MNO Expected Revenue Worldwide [$B] (Machina research, Sept. 2013)

Legend:
- Emergency Services & National Security
- Retail and Leisure
- Agriculture and Environment
- Construction
- Smart Enterprise Management
- Utilities
- Healthcare
- Manufacturing & Supply Chain
- Smart Cities & Public Transport
- Automotive
- Intelligent Buildings

1) Automotive
2-3) Buildings & HealthCare
4-5) Utilities & Retail

Customers
Attraction
with Innovation

Customers Expectations

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Communications as a Service

IOT

M2M

Consumers

- TRENDY CONNECTED DEVICES (HW)
- USE CURRENT DATA CHANNELS (WIFI, SMARTPHONE,…)
- CONSOLIDATED SERVICES
- SINGLE PAYMENT (APP-STORES)

Single Bill

Multiple Shops – Single Marketplace

Single Payment & Clearing

Single Call Center

Near Field Communication Standards

Enterprise Productivity and Profitability

- FLEXIBILITY AND TIME TO MARKET
- PRICE CONTROL AND RISK REDUCTION
- INTERNATIONAL FOOTPRINT
- ASSET MANAGEMENT
- QUALITY, SCALABILITY & SERVICE

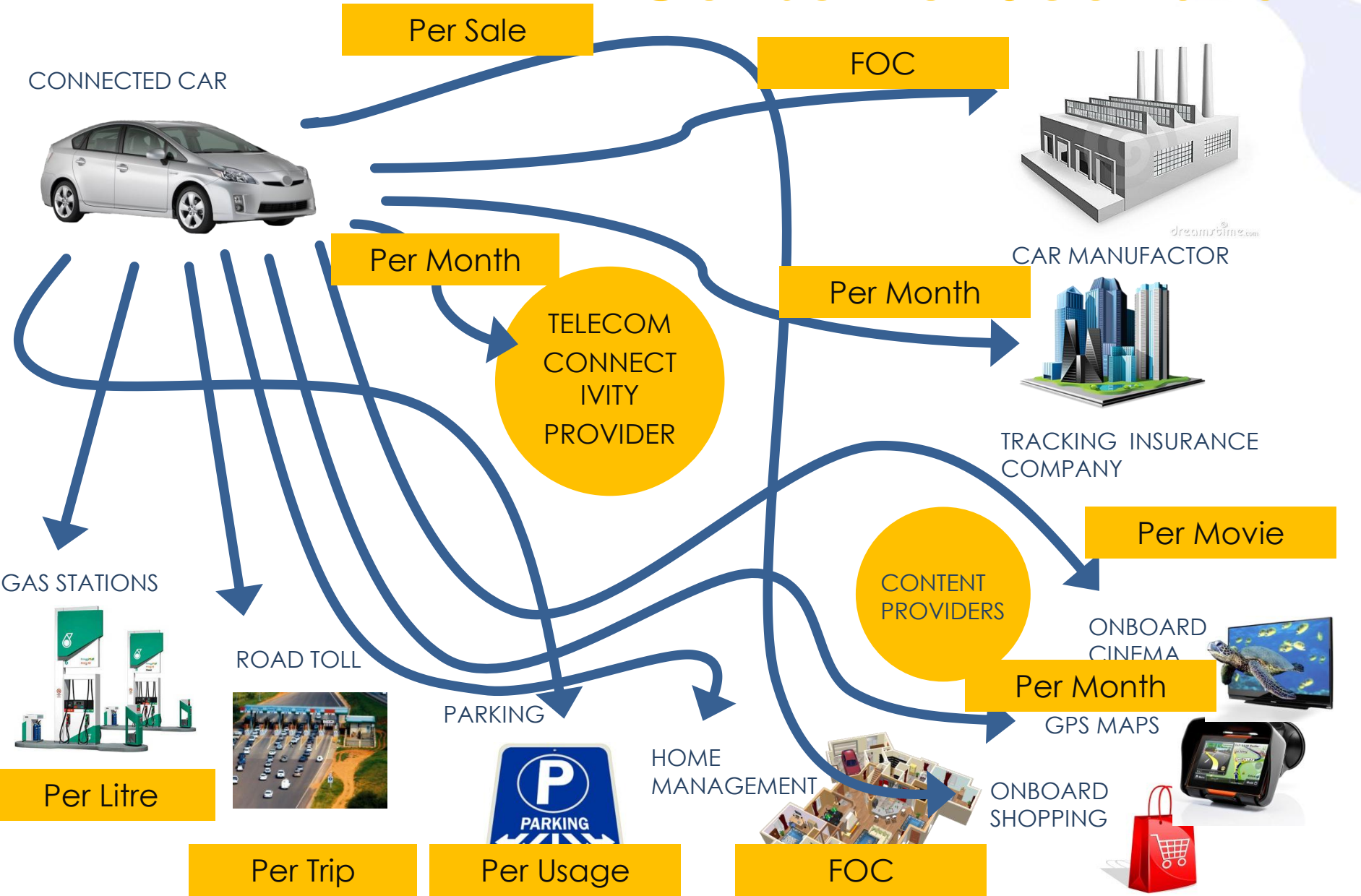Integration Services with Legacy IT

Security & Always On

User and Role Based Operations

Multiple M2M Asset Types (Buildings, Fleets,…)

Support & Troubleshooting Services
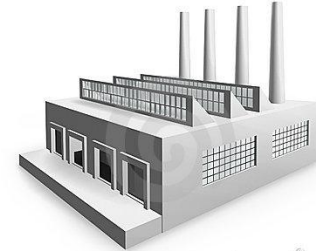
Cost

Consumer Scenario

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Communications as a Service

CONNECTED CAR

Per Sale

FOC

CAR MANUFACTOR

Per Month

TELECOM CONNECTIVITY PROVIDER

Per Month

TRACKING INSURANCE COMPANY

Per Movie

CONTENT PROVIDERS

ONBOARD CINEMA

GAS STATIONS

Per Month

GPS MAPS

ROAD TOLL

PARKING

HOME MANAGEMENT

ONBOARD SHOPPING

Per Litre

Per Trip

Per Usage

FOC

Consumer Scenario - Target

Growing Revenues

M2M Value Chain

MY|evolution — Communications as a Service

8%

| Chipset Vendors | Module Vendors | Device Vendors |
| NEC, QUALCOMM, TEXAS INSTRUMENTS | CINTERION WIRELESS MODULES, SIERRA WIRELESS, MOTOROLA, WAVECOM | ingenico, OnStar |

66%

| Application Service Providers | Vertical Integrators |
| | IBM, GE, accenture |

| Access Providers | M2M Simcards | M2M Platforms | M2M Service Distributors |
| MY|evolution | gemalto | MY|evolution | |

M2M MVNOs serve as aggregators

14%   **13%**

Source : Beecham Research

Retail

Corporate

Government

Key 4 : Provide Upsell Innovate & Innovate more

SEAM CRM M2M

SEAM Market Place

SEAM Border LBS & Fix IP

M2M Marketplace

This M2M Marketplace is a global e-Commerce platform to link Customers with M2M Merchants

Products, Softwares and Solutions on this marketplace are provided directly by our partners

SMEs use CRM for B2B2C for their devices & simcards

SMEs can sell Online and use Telecom grade payment & billing options

Position Anywhere Static Everywhere

Real Life Cases

Real Life Utility **Water** Project
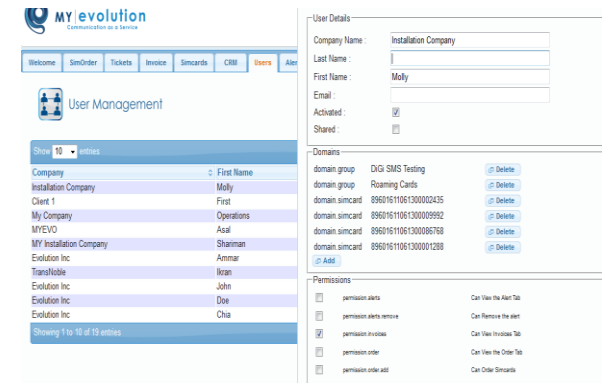### Malaysia

- Successful Challenges solved for a Water Utility
  - SMPP SMS Integration to remove hassle of hundreds of receiving modems
  - Specific Alarm Workflow integrated with legacy Workforce Management
  - Global Management across operators
  - Fixed Asset Positioning (LBS) for all cards
  - User Management Roles for Deployment Team

System Integration

Positioning

Delegated Roles

Real Life **B2B2C** Tracking Project
Singapore

- Success Challenges solved for Consumer Tracking Customer
  - Specific Dealer Registration Workflow (Send Customer Information to Connectivity with validation to start the Telecom service)
  - Automatic Device Configuration (many GPS models)
  - Embedded CRM and Device Management
  - Filter Data / Filter SMS / Data SMS to prevent Fraud
  - Multi-Country Cross Border Offer (for Singapore / Johor consumers)

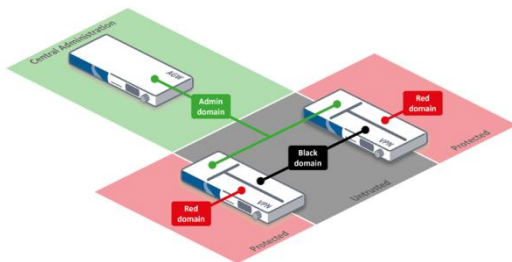**Dealer Management**   **Device Management**   **Traffic Management**   **Global Business**
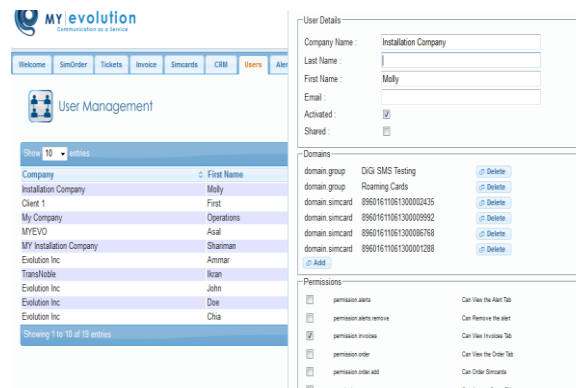
Real Life Asset **Security** Project
Malaysia

- Successful Challenges solved for Asset Security Company
  - Data & SMS domain Separation for Multiple Security Company
  - B2B2B delegated self-care management
  - Specific SLAs with 24/7 Level 2 Support

Domain Separation

Delegation

Support Services

End to End Partners & Solutions

- **Street Lighting Communications**
  - Partner with World Leader
  - Command Center
  - Large Band Freq
  - Integration / Manage Service

- **Smart Farming**
  - Partner with Live Farming Manufacturer
  - Provide Live Asset trace & track solutions

- **Water Management**
  - Partner with the 3 main Asia logger hardware
  - Build Pressure and Flow monitoring Solution custom made for Asia utilities requirements

- Partner with Supporting **Governments Agencies**
  - MDEC,
  - MCMC,
  - CREST,
  - …

Key Success Factors

Challenge Category	Challenges	Key Success Factors
Market Pressures	Price & Profitability Competition from Broadband Time to Launch Innovate vs Imitate	Innovative Product Pricing Right Market Positioning Faster Time to Market
Cost	CAPEX / OPEX Cost Avoidance	Cost Optimization Operation Efficiency
Customer	Customer Experience Customer Retention	Unify the Customer Experience
Partner Management	Wholesale Contracts Right Sized Commercials	Embrace Digital Revenue Share Models

Control on your technology for customization

Easy to use and ….
Easy to share

Lean organization
Standard processors

Ecosystem is good, don't play alone

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Communications as a Service

Conclusion

For Data-MVNOs, IOT & M2M are long term key area
Be prepared to become a System Integrator

- MY Evolution is the **first IOT & M2M dedicated Service Provider in Asia**, dedicated to solve the M2M challenges of our customers

Thank you

WWW.SEAMCARDS.COM

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