



# Automotive OEMs are the next Telcos !

## Presentation to the ConnecteDriver & Smart Mobility

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Presented by  
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Transatel® - Confidential



# Transatel introduction





# The Leading European Enabler of MVNO & IoT

## Transatel at a glance



**18 years'**

experience in  
MVNO & IoT  
market



**80+**

Live operations  
Worldwide



**Full**

Cellular Core  
Network &  
Enabling platform



**180**

Experts in  
mobile connectivity  
services



**130+**

Destinations covered  
with local data  
agreement in 2017





# A wide expertise within the MVNO and IoT Industries



Transatel enables non-telecom players to become MVNOs. We offer different business models, from MVNE/A to branded partner, based on our own full Enabling Platform and interconnections with our MNO partners.

### A few references



[www.transatel-solutions.com](http://www.transatel-solutions.com)

Transatel enables M2M players to include airtime connectivity into their services, as well as a wide range of applications we support, such as fleet and asset tracking, vehicle telematics, smart metering, entertainment, tele-health, ...

### A few references



[www.transatel-m2m.com](http://www.transatel-m2m.com)

Transatel enables Device Manufacturers to enrich their value proposition with a global 3G/LTE connectivity offering, thanks to 901 SIM cards that can be embedded at manufacturing stage.

### A few references



[www.transatel-sim901.com](http://www.transatel-sim901.com)





# Our market focus on IoT



## Consumer Devices

Enable device manufacturers to innovate around connectivity and capture new revenue

Device OEM      Microsoft 'Always Connected PC'      Service providers



## Automotive

Provide connectivity solutions for both vehicle- and passenger-centric applications

Car OEMs      Equipment providers      Application providers



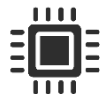
## Industrial IoT

Provide a global connectivity solution for any IoT devices

Enterprise & Resellers      IoT Integrators      IoT Platform providers



FIAT CHRYSLER AUTOMOBILES



## Module & SIM Markets

Develop strategic partnerships to address IoT device manufacturers



Automotive OEMs are the next Telcos !



# The Connected Car enables new services

## Vehicle Centric Services

- Firmware update OTA
- Predictive maintenance
- Stolen Vehicle Tracking
- Fleet management
- Remote control & car sharing
- eCall & bCall
- Autonomous driving
- Live information for continuous design and manufacturing improvements
- Data analytics
- ...



**Connected Car**

## Passenger Centric Services

- Smart navigation
- Usage Based Insurance
- Smart parking services
- Infotainment (video&music streaming)
- WiFi hotspot (On/Off board)
- Conciergerie
- In-car purchasing services (highway tolls, parking, gasoline, etc...)
- Personalized in-car advertising
- ...

# The Connected Car – OEM SWOT

## Opportunity

- Recurring customer interactions
- Brand differentiation
- New mobility needs  
(new services / new business models)

## Threats

- GAFAM & BATX on connected services
- EV pure play OEMs
- Mobile operator capturing most value



## Weaknesses

- Learning curve to master Connectivity
- Integration with cellular carriers across multiple markets
- Strategic disconnect between OEMs and MNOs (longer life cycle / risk of lock-in)

## Strengths

- OEMs control the HW (the ON button)
- Strong culture of safety and reliability
- Bundled offer at time of vehicle purchase (pre-loaded service bundle)







# A few key requirements

- Security
- Service control and differentiation from GAFA
  - Split billing
  - Sponsored data
  - Vehicle centric vs. Passenger centric

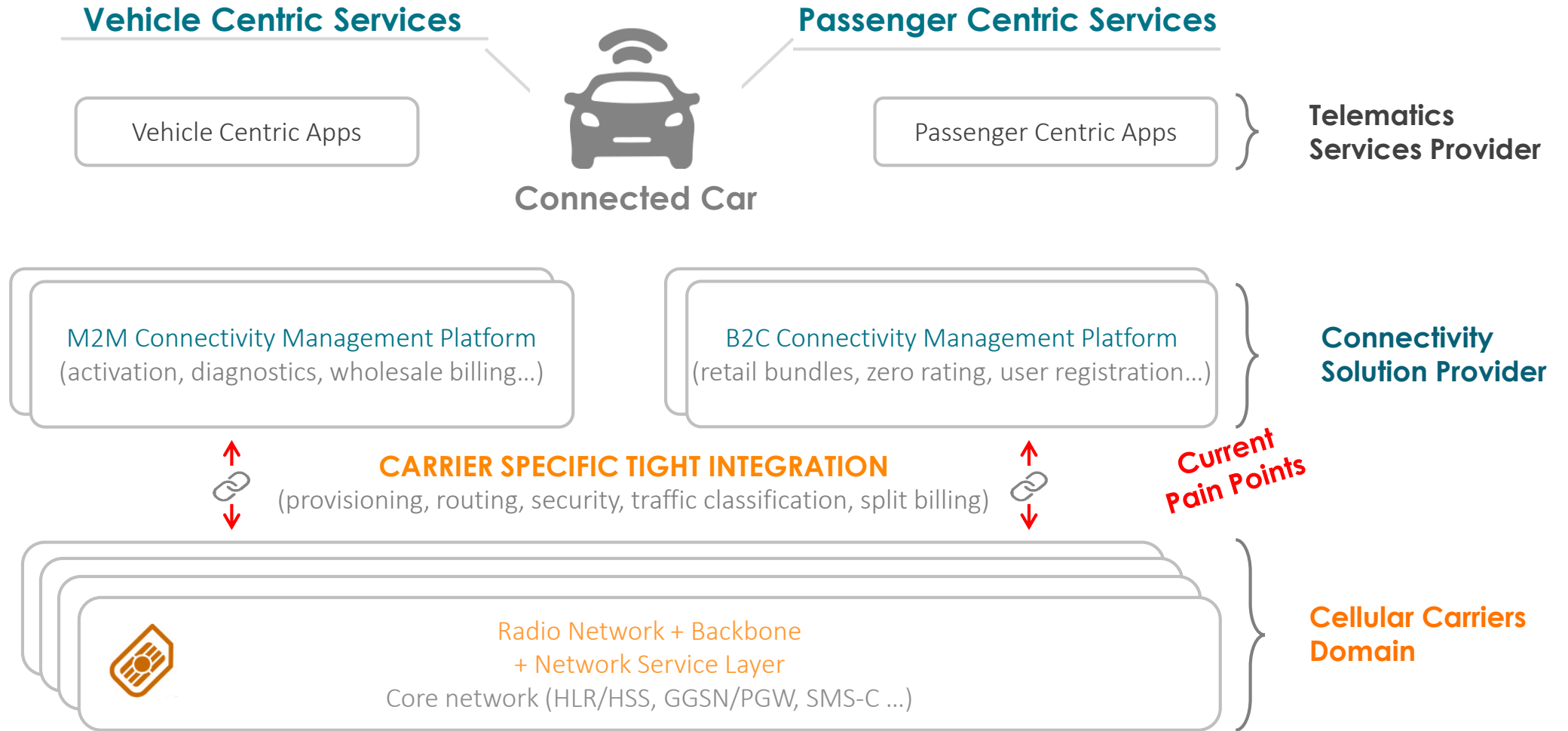
⇒ Both require tight integration with core network

- HLR / HSS
  - GGSN / PGWay
  - Sim card
- 
- Long term economical sustainability
    - Service in car need to be provided for at least 10 years
    - Data volume increase by 20% to 40% per year
    - Data costs/price is reducing by 20% to 40% per year





# Connected Car current pain point: integration with Carriers





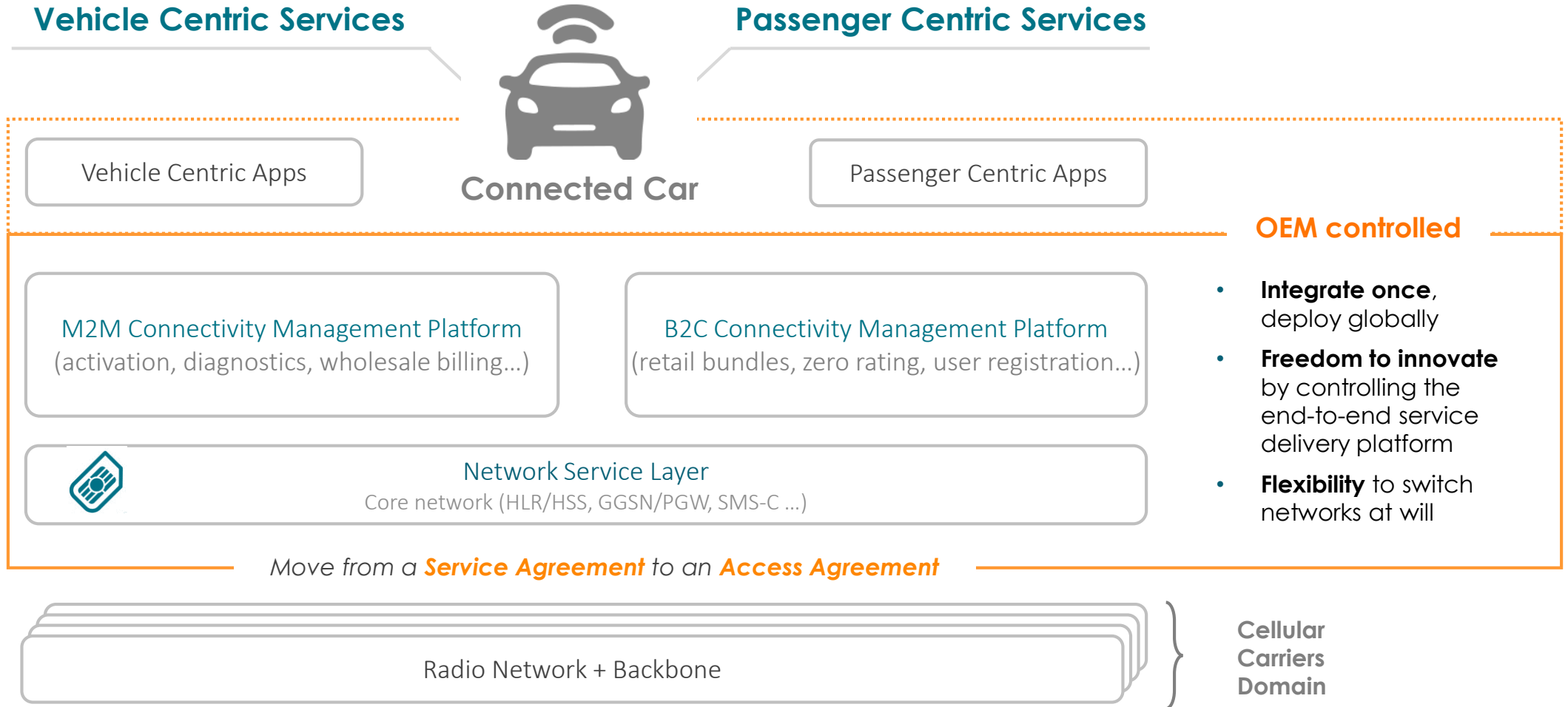
# Focus on pain points on MNO change

- eUICC needs that the car is
  - under coverage
  - Stopped
  - Switch-on (modem)
  
- Move from MNO-1 M2M P/F to MNO-2 M2M P/F .....
  
- Re-do service integration
  - Billing / Split billig / Sponsored data
  - Security solutions





# OEM strategic move to control the Core Network



# Your path towards MVNO: Execution plan

## Resources (MNC)

- Apply for MNC
- Apply for GSMA membership
- Select a 901 Sponsor for extended coverage
- Manage coexistence & transition between OEM own MNC & Sponsor MNC

## Wholesale agreements

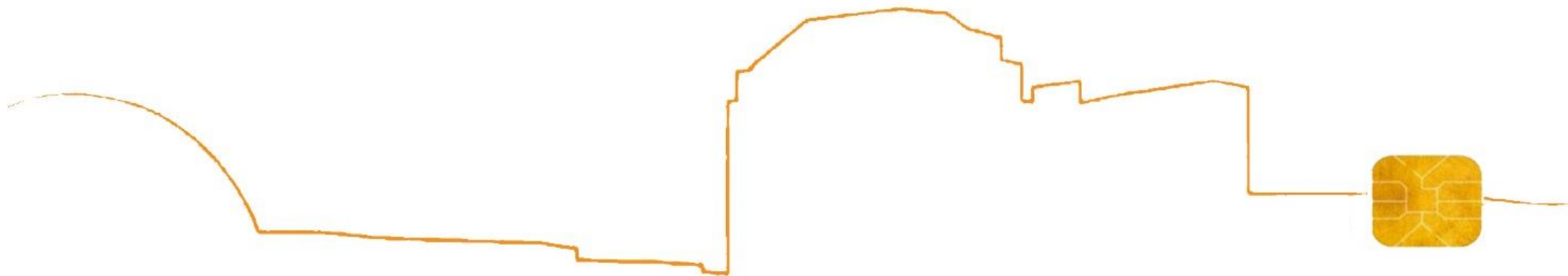
- Negotiate direct wholesale deals in key markets
- Rely on 901 Sponsor for rest of the world
- Implement and operate these wholesale agreements

## Core network & Management platform

- Formalize Functional & Technical requirements to support the Vehicle & Passenger & OEM centric services
- CAPEX / OPEX model (own or outsource)
- Roll-out project + in-life operations

## Go Live organization

- Regulatory compliance in local markets
- Operational marketing
- Customer support & billing
- Wholesale billing reconciliation



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