



Telenor Connexion and IoT trends

Mats Lundquist, CEO

The background is a blurred city street at night, overlaid with a blue tint and a network diagram of interconnected nodes and lines. The text is centered in the upper half of the image.

Telenor Connexion

Industry trends

Future of IoT service providers

IoT within Telenor group

Business Units

- Regional use cases
- >3 million IoT SIMs
- Smart digital solutions



Group

- Wholesale
- Research

Connexion

- Enterprises with large or international fleets
- >10 million IoT SIMs
- Managed Connectivity and IoT Cloud services

Telenor Connexion customers and sales offices



ASSA ABLOY



CIMC

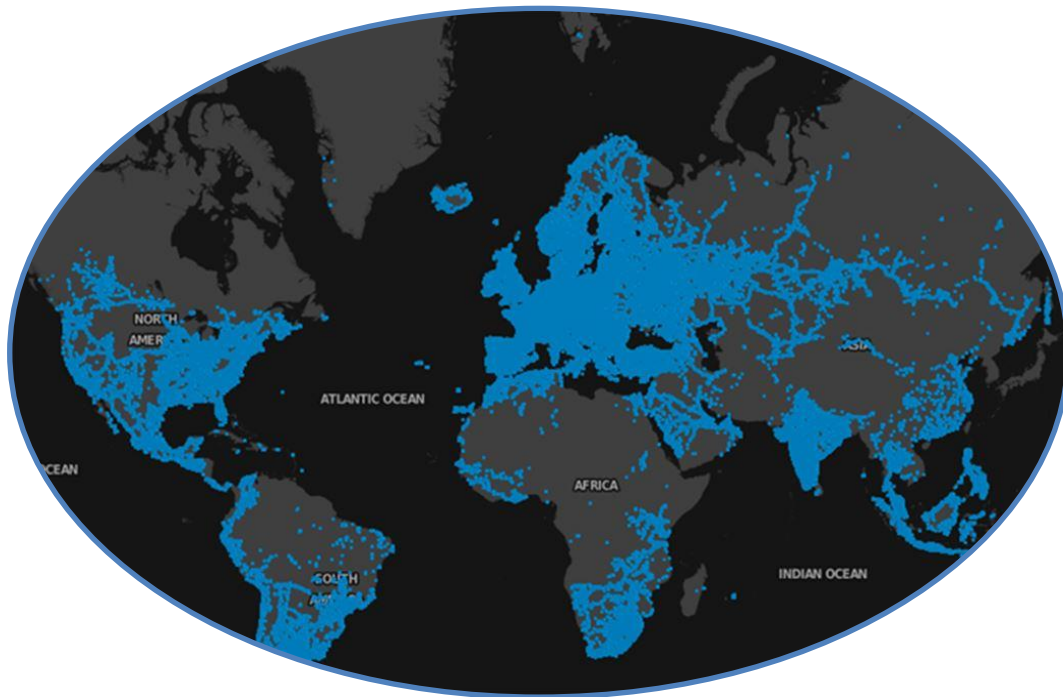


Global connectivity with a single interface

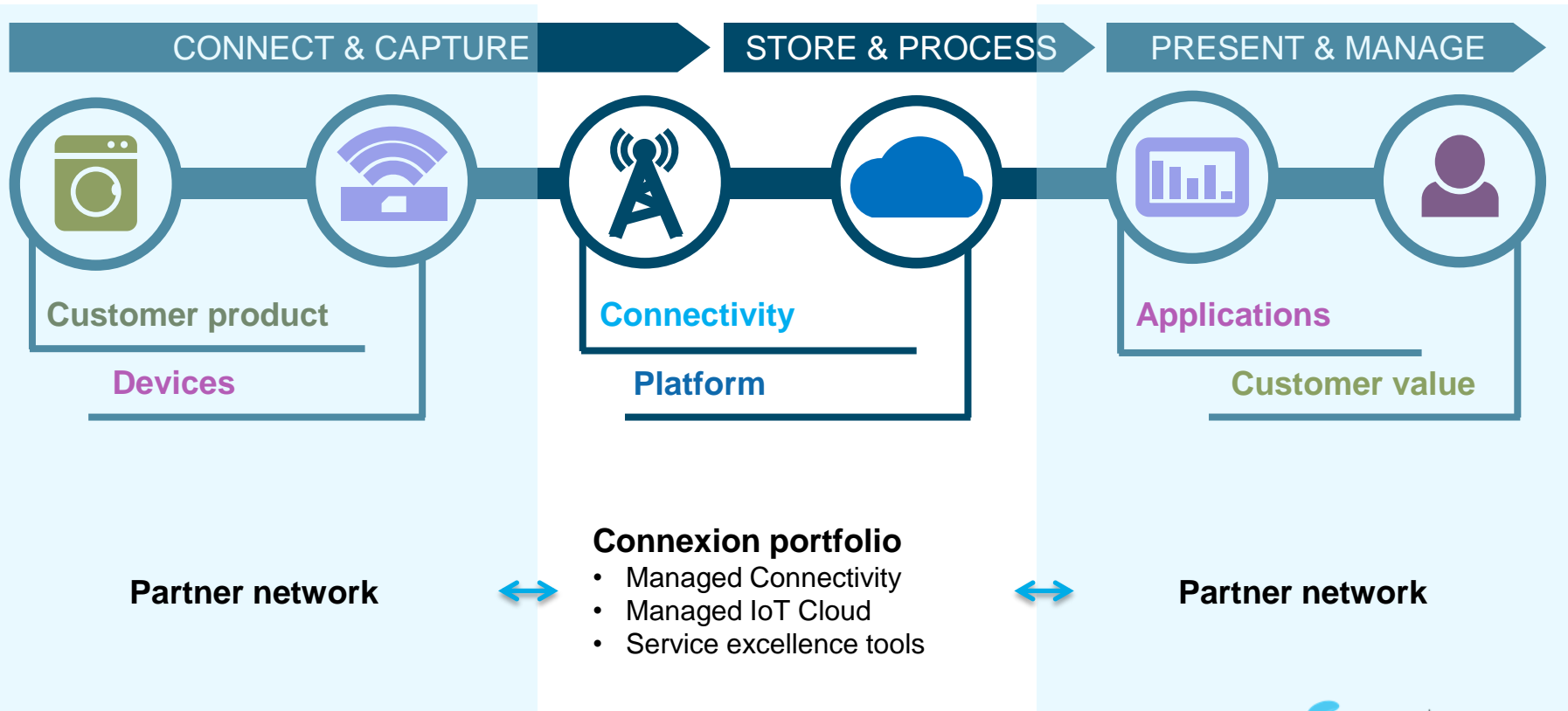
Connecting devices in
180+ countries

Individual customers
with devices in 140+
countries

Mainly multi-
operator

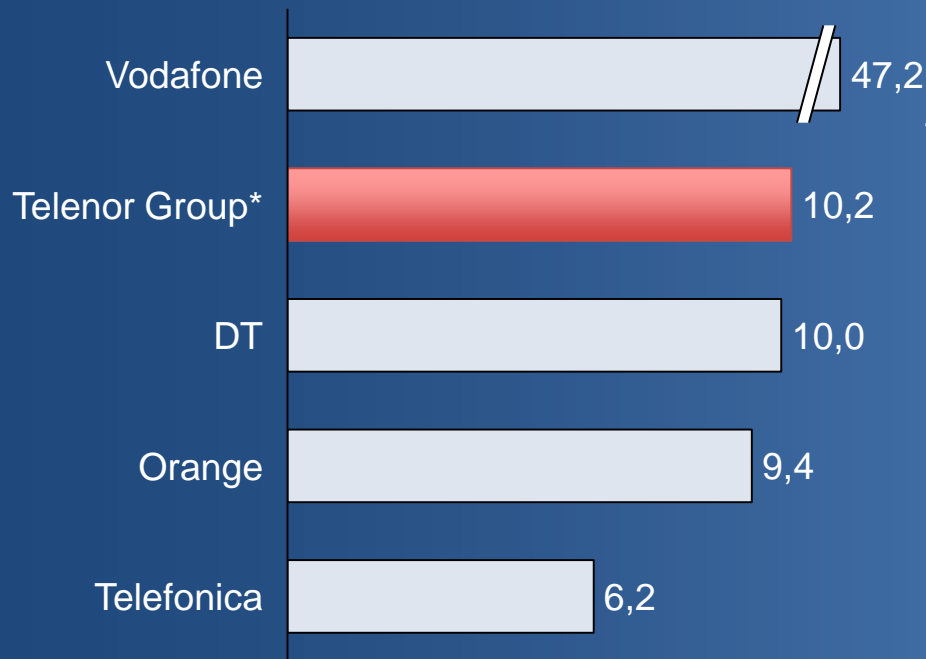


Telenor Connexion portfolio



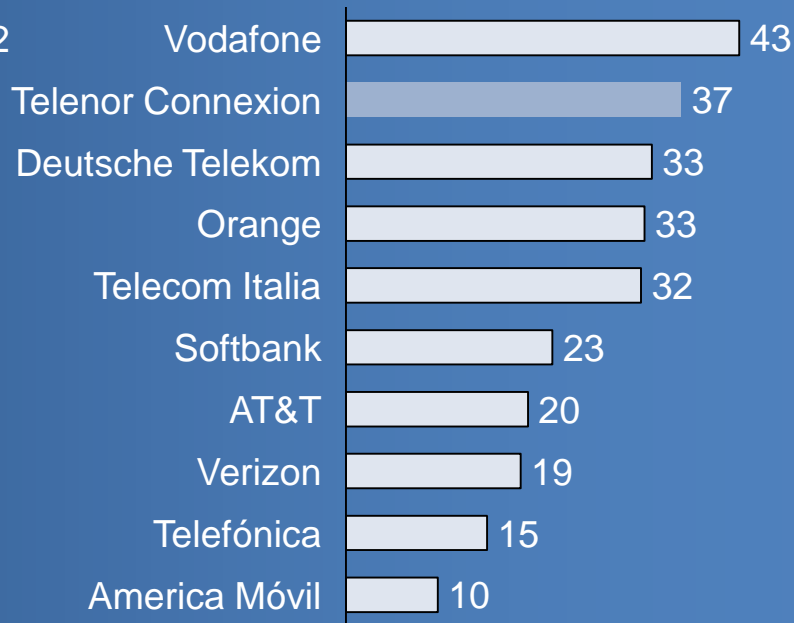
IoT subscribers Europe 2017

Million cellular M2M subscriptions (2017Q2)



SIM growth 2016H1 – 2017H1

Percent; Top 10 international operator groups**



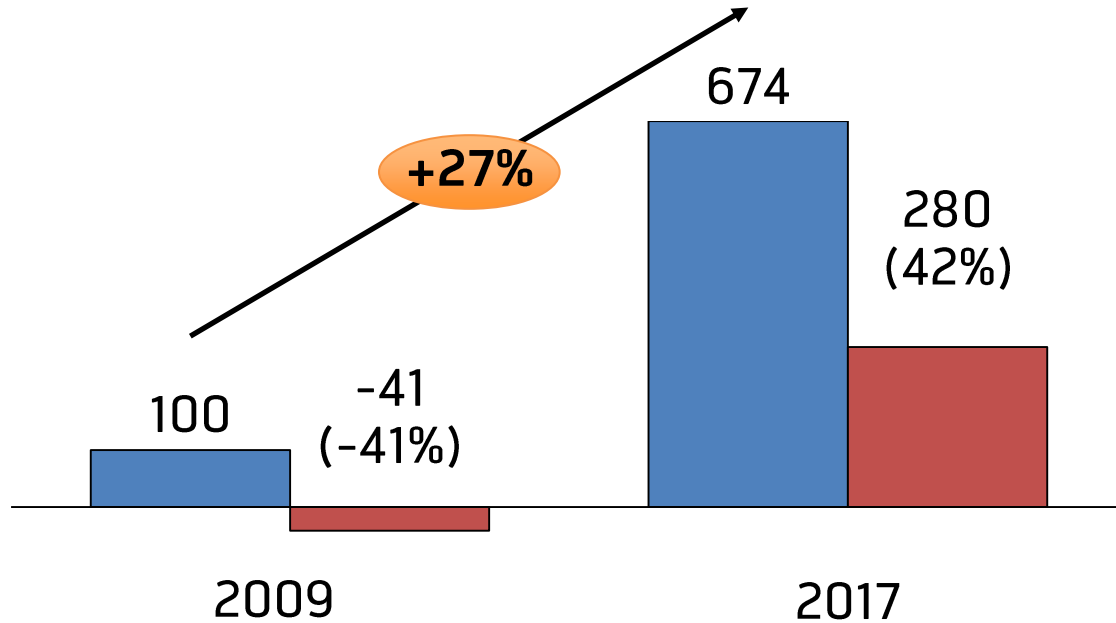
* Incl. Telenor BUs and Telenor Connexion
Source: Berg Insight 2018

** In terms of number of IoT connections,
excluding Chinese Operators

Telenor Connexion financials

Million SEK, CAGR

Revenue
EBITDA (margin)

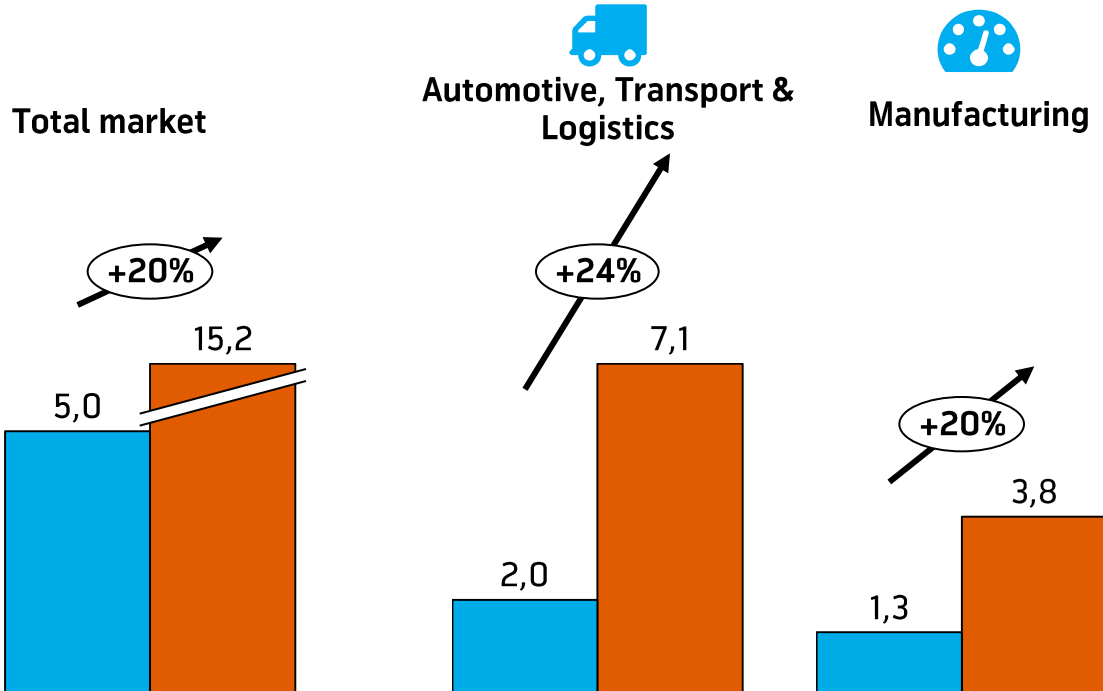
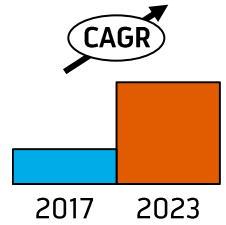


A blue-tinted cityscape with a network overlay. The background shows a city with a prominent spire and a bridge over water. A network of white lines and dots is overlaid on the image, representing a network or IoT infrastructure.

Telenor Connexion
Industry trends
Future of IoT service providers

Cellular IoT growth across manufacturing industries

Network revenues; 2017-2023, BEUR globally



Digitalization of the customer experience



Connected product

~2008



Product-as-a-service

~2015



Ecosystem experience

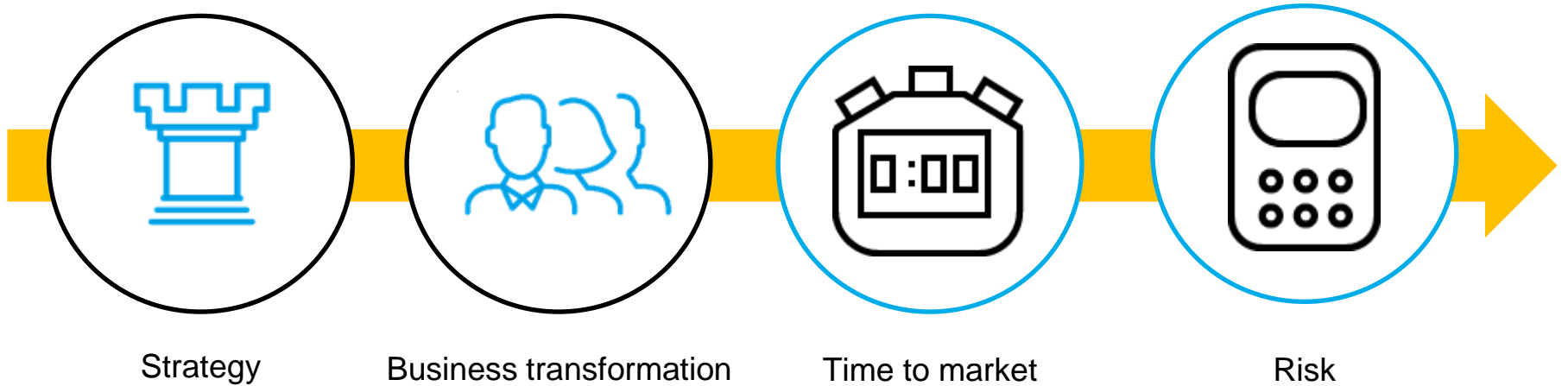
~2018



Autonomous experience

2020+

Requirements on a succesful IoT solution



IoT infrastructure evolution

Pioneers

End to end
customized

~2000

Adopters

Standardized IoT
platforms and
solution eco-system

~2015

Natives

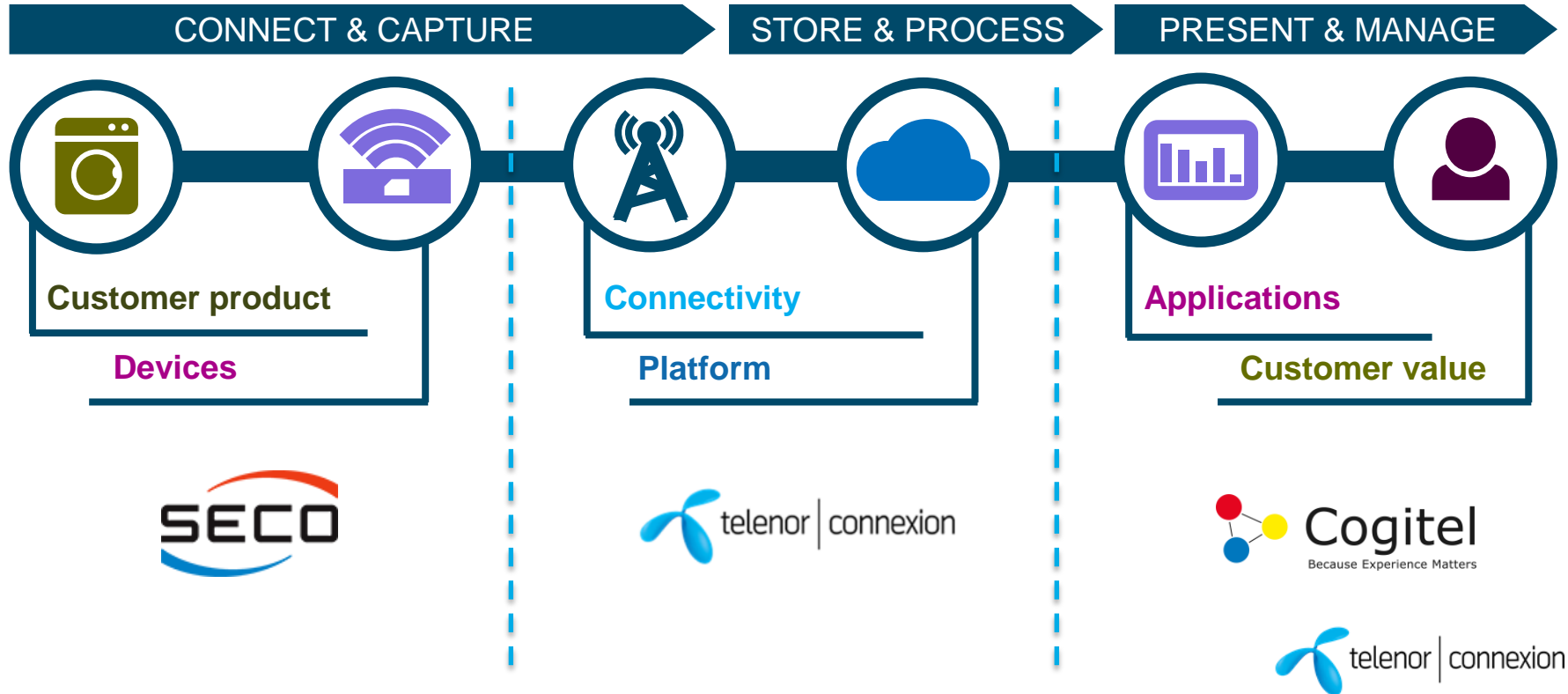
All components
designed for
IoT

~2020

A large crowd of people is shown at night, with a strong blue color overlay. A network of white lines and dots is superimposed over the crowd, suggesting connectivity or data flow. The word "QUIZ" is written in white, bold, uppercase letters in the center of the image.

QUIZ

Example of developing a connected product today



Time to develop a connected product today?

A. < 3 month

B. < 3 years

C. > 3 years

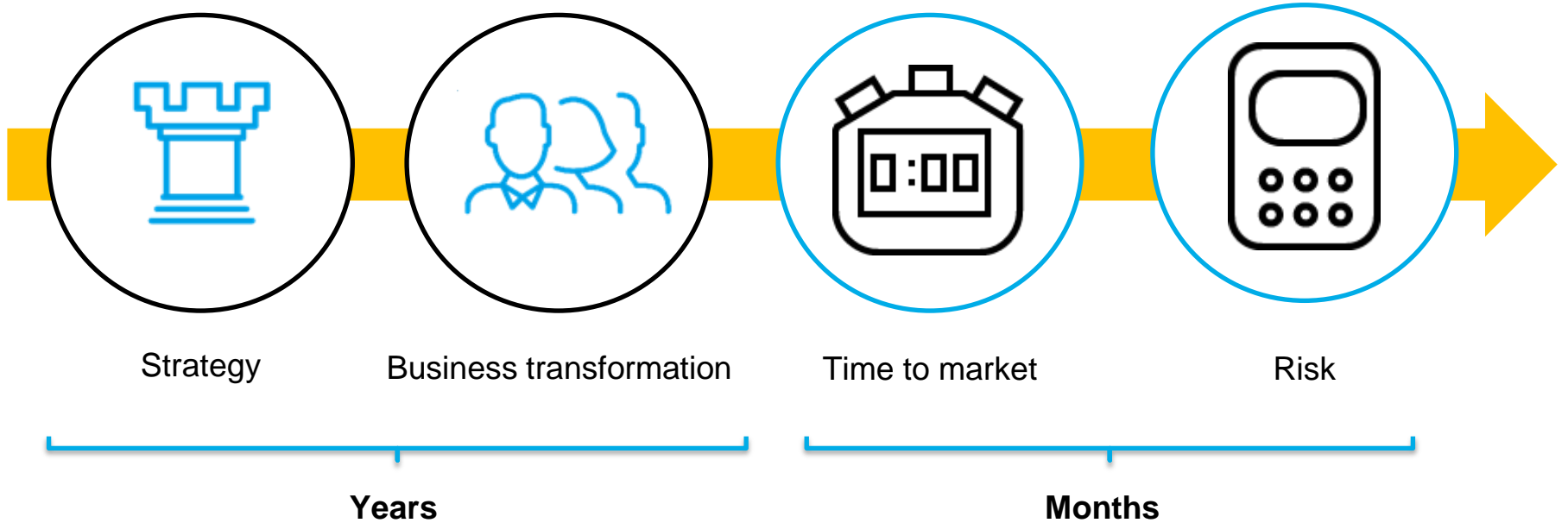
Cost to develop a connected product today?

A. < 1 million SEK

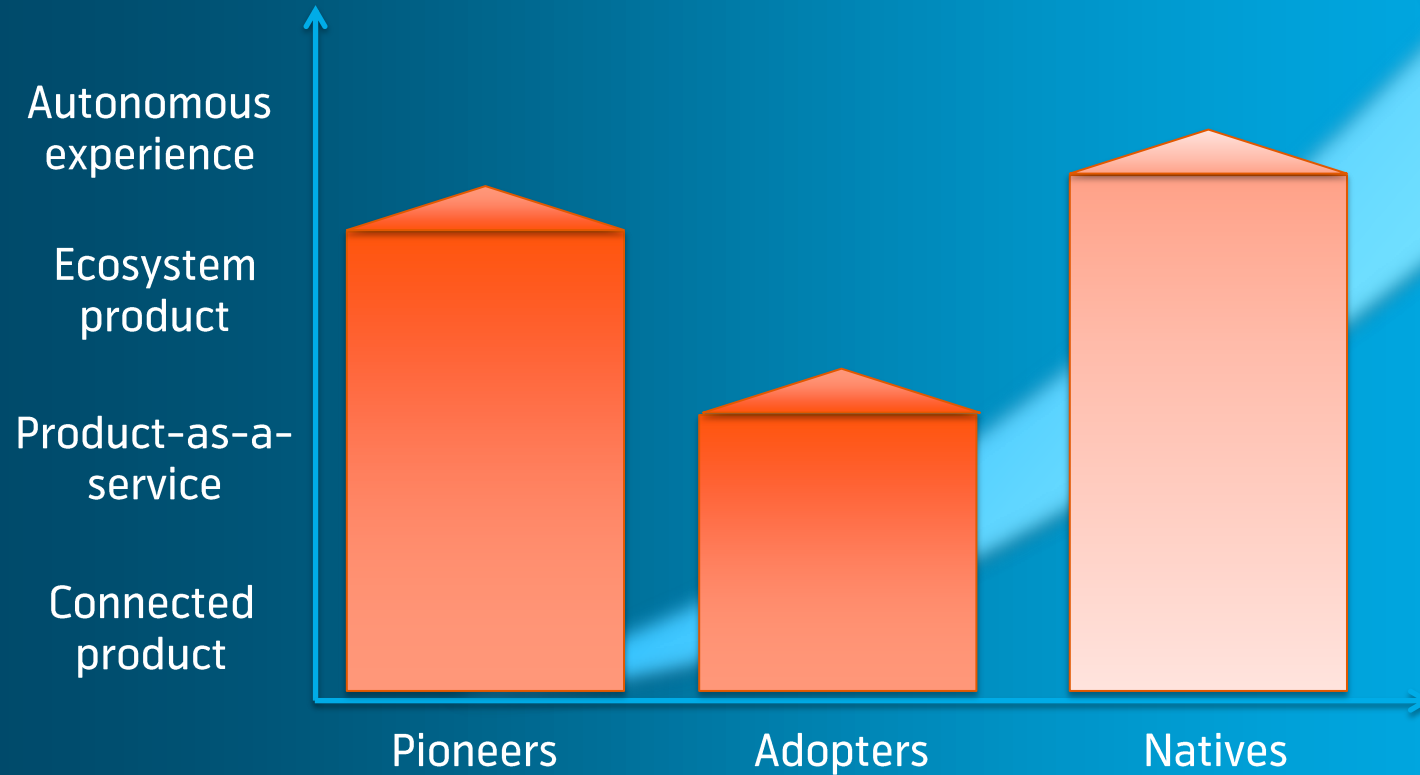
B. < 10 million SEK

C. > 10 million SEK

Requirements on a succesful IoT solution



Industry status

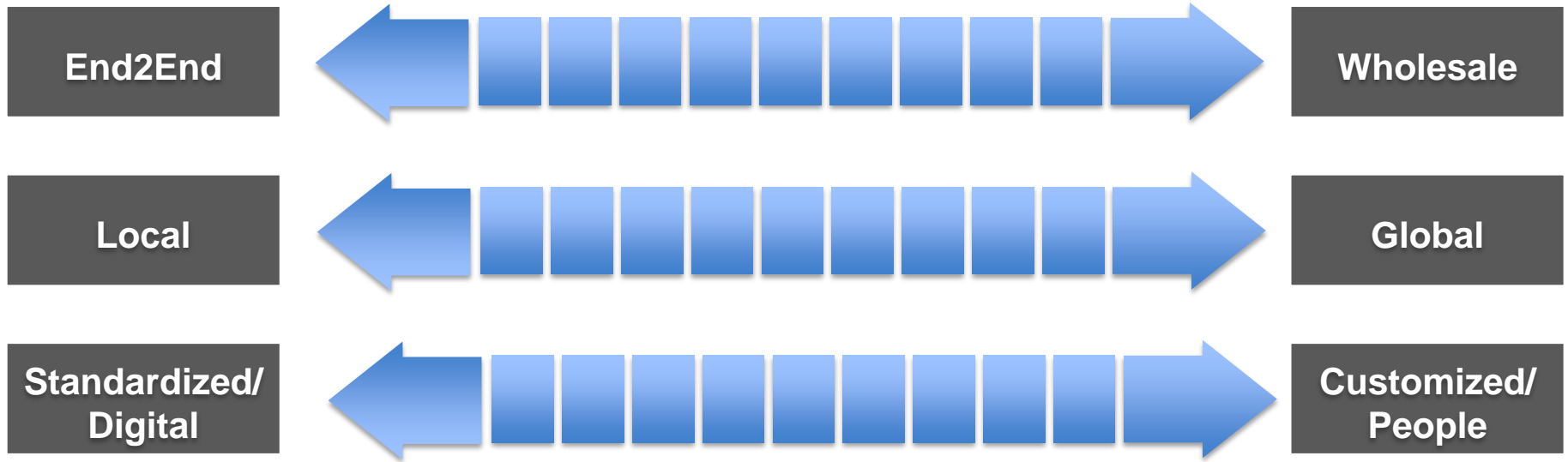




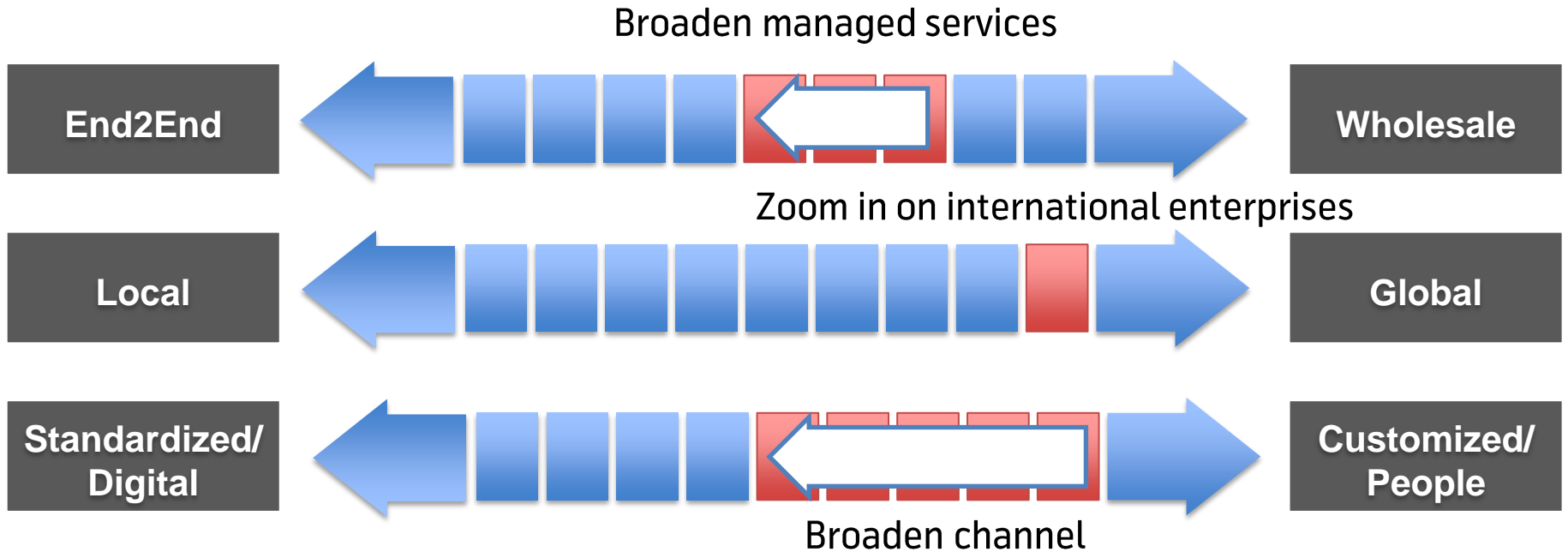
Telenor Connexion
Industry trends

Future of IoT service providers

The successful IoT service provider has to make choices



Telenor Connexion – looking ahead



To sum up

Continued 2 digit growth across managed IoT services markets

Growth rate is driven by speed of digitalization across industries

Telenor Connexion is well positioned to capture growth from large scale and international IoT deployments



Connecting things. It's all about people.

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