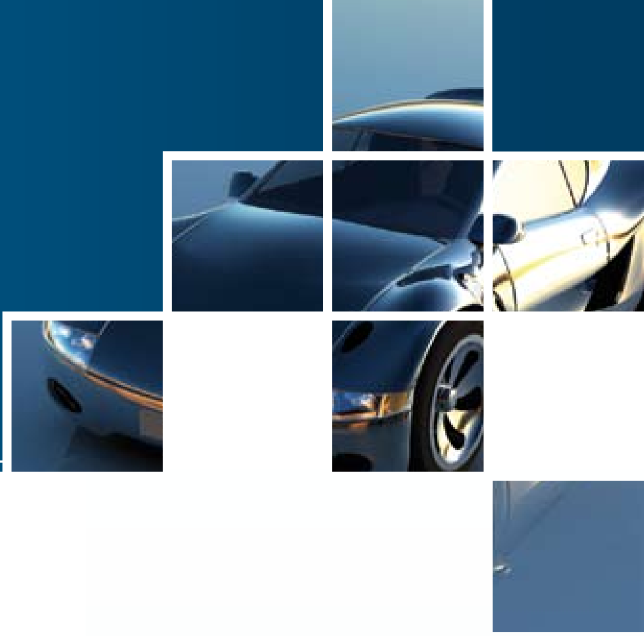
M2M Research Series

Car Telematics and Wireless M2M



Car Telematics and Wireless M2M is the second consecutive report analysing the latest developments on the European market.

This strategic research report from Berg Insight provides you with 110 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

This report will allow you to:

- **Understand** the dynamics of the European car telematics industry.
- **Learn** about the telematics strategies of the technology leading car manufacturers.
- **Evaluate** the likelihood for eCall to become operational before 2012.
- **Identify** the most attractive applications for car telematics and the most active geographical markets.
- **Realise** the potential importance of motor insurance providers in the telematics value chain.
- **Profit** from valuable insights about the most successful business and technology propositions on the market.

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Berg Insight's M2M Research Series

What are the key business opportunities in the emerging European wireless M2M market? Berg Insight's M2M Research Series is a unique series of market reports published on a quarterly basis. Each title offers detailed analysis of a specific vertical application area such as intelligent metering, fleet management or vehicle telematics. Once per year we also publish a summary of our research with detailed forecasts for the European wireless M2M market.

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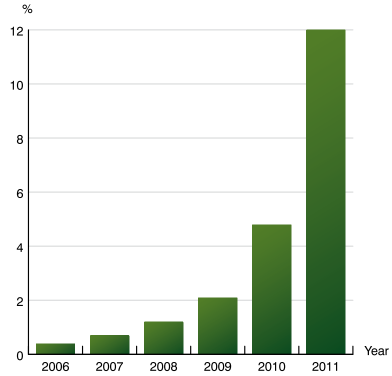
BERG INSIGHT

Will Europe ever catch up with North America in car telematics?

At the beginning of 2006 about 219 million passenger cars were registered in the EU23+2 area. The ultimate goal for the car telematics industry is to connect all these vehicles to mobile networks. Even though there are numerous potential applications for car telematics technology, only very few have so far proven commercially viable on the European market. eCall and driver assistance applications deliver value in the form of improved safety and better convenience when travelling. Stolen vehicle tracking and recovery facilitates recovery of the car in case of theft and frequently entitles the owner to insurance benefits. PAYD (pay-as-you-drive) insurance enables a completely new vehicle insurance model with individual premiums based on driving behaviour. Possible applications that have not yet reach commercial maturity include remote diagnostics and maintenance, connected navigation and online entertainment. Electronic toll collection based on GSM/GPS tracking has so far only been introduced for commercial vehicles. In the longer term similar technology may also be deployed for vehicle taxation.

Europe is currently trailing behind North America in the adoption of car telematics technology. After the initial setbacks, the market is now rebounding thanks to offerings which are more focused on creating customer value than integrating new technology. Progress is made simultaneously at a national as well as at a European level. Motor insurance providers have been crucial for the relative success on the Italian market and also play important roles in other countries. The recent debate around eCall has raised the awareness of telematics within the automotive industry as well as among stakeholders and will at the very least end in some sort of compromise consensus for how it should become possible to deliver a pan-European automatic emergency call service on a voluntary basis. Still the most likely outcome of the eCall process is that automatic emergency call capabilities will become a standard feature on all new cars in Europe in the early 2010s and pave the way for more advanced services later in the decade.



Penetration rate for car telematics in the entire car parc (EU15+2 2006–2011)

This report answers the following questions:

- What are the dynamics behind developments in the European car telematics industry?
- What is the expected annual market growth rate until 2011?
- When will the eCall system become operational and mandatory on new vehicles?
- Which applications are faring best in the harsh market environment?
- Which geographical markets are currently the most advanced?
- How could increasing participation from motor insurance providers transform the industry?
- Will PAYD technology change the way Europeans insure their cars?
- Which are the leading providers of aftermarket car telematics solutions in Europe?
- What are the current car telematics offerings from the OEMs?

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About the Authors


Hanna Hallberg is a telecom analyst with a Bachelors degree in Business Administration from Lancaster University. She joined Berg Insight in 2006 and her areas of expertise include wireless M2M.

Tobias Ryberg is founding partner of Berg Insight and principal analyst responsible for the M2M research series. He is an experienced analyst and author of numerous articles and reports about telecom and IT for leading Swedish and international publishers. The Car telematics market in Europe has been one of his major research areas for the past 3 years.

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Car Telematics and Wireless M2M is the foremost source of information about the car telematics market in Europe. Whether you are a telematics vendor, vehicle manufacturer, telecom operator, investor, consultant or government agency, you will gain valuable insights from our in-depth research.

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