

The North American Wireless M2M Market

The North American Wireless M2M Market is a comprehensive report analysing the market for cellular machine to machine communication in the US and Canada.

This strategic research report from Berg Insight provides you with 130 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 true potential of the North American cellular wireless M2M market.
- **Anticipate** future trends and technology developments.
- **Evaluate** the business opportunities in the main vertical market segments.
- **Identify** potential customers, partners and competitors in the US and Canada.
- **Comprehend** the differences and commonalities between North America and other regions.
- **Profit** from valuable insights about the most successful business propositions on the market.



Order now!

Please visit our web site to order this report and find more information about our other titles at www.berginsight.com

Berg Insight's M2M Research Series

What are the key business opportunities in the emerging 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 and North American wireless M2M market.

www.berginsight.com

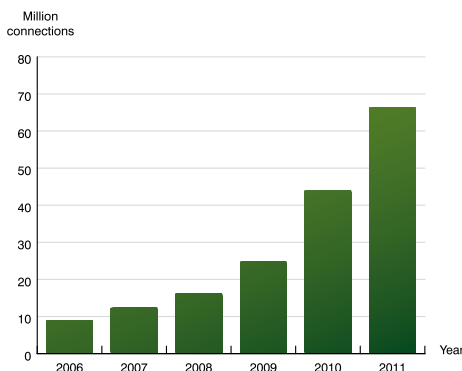
See inside for further details →



Connected cars and meters in sight on the North American wireless M2M market

The North American wireless M2M market is in a transitional stage where analogue wireless technologies disappear at the same time as the growth for digital wireless M2M is accelerating. Berg Insight estimates that shipments of cellular and satellite wireless M2M devices in North America reached a record level of 5.3 million units in 2006. Growing at a compound average annual growth rate of 27.3 percent, the market size is expected to reach 22.6 million units by 2011. Private vehicles will remain the overwhelmingly largest segment, underpinned by mass-market OEM telematics offerings from GM and other auto manufacturers. Steady growth is also expected in the commercial vehicles and energy meters segments. Shipments of energy meters with cellular capabilities are expected to accelerate at the end of the period due to large scale deployments of AMI. Demand in the security alarms and POS-terminal segments is expected to peak in 2007 due to replacement of analogue technologies.

Two vertical market segments stand out as those with the overwhelmingly largest potential for wireless M2M – utility meters and motor vehicles. North America has about 256 million motor vehicles and 217 million electricity and gas meters. Motor vehicles require wireless communication links, whereas fixed line and non-cellular wireless are potent alternatives for utility meters. Other segments with more limited potential include security alarms and POS-terminals. There are about 32 million monitored alarm systems in North America and the population of POS-terminals is estimated to 15 million. Both types of devices are today predominantly connected to fixed line networks. In the case of security alarms, cellular networks can serve a vital role as backup communication links. POS-terminals become more versatile with ►



Cellular wireless M2M connections in North America (2006 - 2011)

► cellular connectivity and in some cases dedicated fixed lines can be replaced by cellular connections also at fixed locations.

Apart from standardized high volume devices, whether it be utility meters and car telematics units or security alarms and POS-terminals, there is also a sizable market for general purpose cellular M2M modems and terminals. Those are frequently sold through the distribution channel to system integrators who develop tailored wireless M2M solutions on behalf of enterprise clients. This market segment is still relatively important, but is increasingly being diminished by the high volumes achieved for standardized solutions.

Several categories of network operators and other service providers offer wireless M2M communication services on the North American market. The nationwide cellular network operators mainly service the M2M market through indirect sales channels and major customer accounts. In their place, a number of cellular M2M communication service providers have emerged. These include Aeris, Jasper Wireless, KORE Telematics and Numerex. Furthermore there are several non-cellular communication providers like SkyTel and Orbcomm offering solutions based on technologies such as paging and satellite networks.

This report answers the following questions:

- How large is the actual addressable market for wireless M2M in North America?
- Which are the fastest growing segments for cellular M2M technology in the US and Canada?
- When will cellular GPS safety and security equipment become a standard feature on the US automobile market?
- What are the main wireless alternatives to cellular technologies in North America?
- Are CDMA and GPRS viable communication bearers for AMI?
- What are the impacts of the FCC Sunset Clause for wireless M2M?
- How is cellular GPS tracking changing the fleet and logistics industries?
- What is driving the adoption of wireless POS-terminals and security alarms?
- Who are the leading wireless M2M communication providers in the US and Canada?

► Table of Contents

| | | |
|---|--|---|
| 1 Introduction to wireless M2M and the North American market | 4.2.3 Car telematics value chain and stakeholders | 6.2.3 AMI value chain and stakeholders |
| 1.1 Introduction | 4.3 Key player profiles | 6.3 Key player profiles |
| 1.1.1 From telemetry to M2M | 4.3.1 ATX Group | 6.3.1 Bayard Group |
| 1.1.2 Industry value network | 4.3.2 Cross Country | 6.3.2 Elster |
| 1.2 Key vertical market segments | 4.3.3 Hughes Telematics | 6.3.3 Itron |
| 1.2.1 Motor vehicles | 4.3.4 Inilex | 6.3.4 Sensus Metering Systems |
| 1.2.2 Electricity and gas meters | 4.3.5 LoJack | 6.3.5 DSCI |
| 1.2.3 Other segments | 4.3.6 OnStar | 6.3.6 Comverge |
| 1.3 Wireless M2M communication technologies | 4.3.7 PassTime | 6.3.7 CURRENT Communications |
| 1.3.1 Cellular networks | 4.3.8 WebTech Wireless | 6.3.8 Echelon |
| 1.3.2 Mobile Satellite Service (MSS) | 4.3.9 WorldScout | 6.3.9 eMeter |
| 1.3.3 Unlicensed frequencies | 4.4 Automobile manufacturer telematics strategies | 6.3.10 Olameter |
| 1.4 Cellular M2M data modules and terminals | 4.4.1 GM | 6.3.11 SmartSynch |
| 1.4.1 Cellular M2M communication devices | 4.4.2 Ford | 6.3.12 Tantalus |
| 1.4.2 Cellular M2M device vendors | 4.4.3 Toyota | 6.3.13 Trilliant Networks |
| 2 Network operators and MVNOs | 4.4.4 Daimler Chrysler | 6.4 AMI deployments in the US and Canada |
| 2.1 Cellular network operators | 4.4.5 BMW | 6.4.1 Pacific Gas & Electric |
| 2.1.1 AT&T | 5 Commercial vehicles | 6.4.2 PECO |
| 2.1.2 Verizon Wireless | 5.1 The North American commercial vehicle market | 6.4.3 PPL Electric |
| 2.1.3 Sprint Nextel | 5.2 Fleet management solutions | 6.4.4 TXU |
| 2.1.4 T-Mobile USA | 5.2.1 Fleet management applications | 6.4.5 Hydro One |
| 2.1.5 Second tier US cellular network operators | 5.2.2 Fleet management infrastructure | 7 Security alarms |
| 2.1.6 Canadian cellular network operators | 5.2.3 Fleet management value chain and stakeholders | 7.1 The North American security alarm market |
| 2.2 Cellular M2M communication providers | 5.3 Key player profiles | 7.2 Cellular alarm monitoring solutions |
| 2.2.1 Aeris | 5.3.1 @Road | 7.3 Key player profiles |
| 2.2.2 CrossBridge Solutions | 5.3.2 AirIQ | 7.3.1 ADT |
| 2.2.3 Jasper Wireless | 5.3.3 Ayantra | 7.3.2 Brinks |
| 2.2.4 KORE Telematics | 5.3.4 Discrete Wireless | 7.3.3 Protection One |
| 2.2.5 Numerex | 5.3.5 Fleetilla | 7.3.4 Monitronics |
| 2.2.6 Wyless | 5.3.6 General Electric | 7.3.5 HSM |
| 2.3 Non-cellular M2M communication providers | 5.3.7 Grey Island | 7.3.6 Alarm.com |
| 2.3.1 Inmarsat | 5.3.8 Networkcar | 7.3.7 AES IntelliNet |
| 2.3.2 Orbcomm | 5.3.9 PeopleNet | 7.3.8 Honeywell Security & Custom Electronics |
| 2.3.3 SkyTel | 5.3.10 Qualcomm WBS | 7.3.9 Telular |
| 3 Market forecasts and trends | 5.3.11 SkyBitz | 7.4 Impacts of the FCC Sunset Clause |
| 3.1 North American wireless M2M market summary | 5.3.12 Teletrac | 8 POS-terminals |
| 3.2 Private vehicles | 5.3.13 TomTom WORK | 8.1 The North American POS-terminal market |
| 3.3 Commercial vehicles | 5.3.14 Tripmaster | 8.2 POS-terminal payment transactions |
| 3.4 Electricity and gas meters | 5.3.15 Wireless Matrix | 8.3 Key player profiles |
| 3.5 Security alarms | 5.4 OEM commercial vehicle telematics solutions | 8.3.1 VeriFone |
| 3.6 POS-terminals | 5.4.1 Ford | 8.3.2 Ingenico |
| 4 Private vehicles | 5.4.2 Navistar International | 8.3.3 Hypercom |
| 4.1 The North American private vehicle market | 5.4.3 Volvo Trucks | 8.3.4 Thales |
| 4.2 Car telematics solutions | 6 Electricity and gas meters | 8.3.5 ExaDigm |
| 4.2.1 Car telematics applications | 6.1 The North American utility industry | 8.3.6 Linkpoint |
| 4.2.2 Car telematics infrastructure | 6.1.1 US electricity and gas market | 8.4 Secure cellular POS-terminal transactions infrastructure |
| | 6.1.2 Canada electricity and gas markets | 8.4.1 Apriva SecurePOS |
| | 6.1.3 North American utility industry players | 8.4.2 Transition from analogue to digital networks |
| | 6.2 AMI solutions | |
| | 6.2.1 AMI applications | |
| | 6.2.2 Advanced metering infrastructure | |

Glossary

About the Author



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.

Berg Insight offers premier business intelligence to the telecom industry. We produce concise reports providing key facts and strategic insights about pivotal developments in our focus areas. From time to time we also perform custom research assignments. Our vision is to be the most valuable source of intelligence for our customers.

© Berg Insight AB - No. 07 s-c.se

| Who should buy this report? | Related products |
|--|---|
| <p>The North American Wireless M2M Market is the foremost source of information about the status, future trends and technology developments on this market. Whether you are a telecom vendor, telecom operator, investor, consultant or government agency, you will gain valuable insights from our in-depth research.</p> | <ul style="list-style-type: none"> ■ Wireless M2M and Mobile Broadband Devices ■ Car Telematics and Wireless M2M ■ Fleet Management and Wireless M2M ■ Strategic Analysis of the European Wireless M2M Market |

Order form – TO RECEIVE YOUR COPY OF ‘THE NORTH AMERICAN WIRELESS M2M MARKET’

You can place your order in the following alternative ways:

1. Place your order online in our web shop at www.berginsight.com
2. Fax this order sheet to us at fax number: +46 31 711 30 96
3. Mail this order sheet to us at: Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden
4. Email your order to: info@berginsight.com
5. Phone us at +46 31 711 30 91

Choose type of format

- Paper copy 1500 EUR
- PDF 1-5 user license 2250 EUR
- PDF corporate license..... 4500 EUR

| | | | |
|----------------|----------|----------|----------|
| Family/Surname | Forename | Position | Company |
| Address | | Country | Postcode |
| Telephone | FAX | Email | |

VAT is chargeable on all orders from Sweden. Orders from all other countries in the European Union must include the buyer's VAT Registration number below in order to avoid the addition of VAT.

| | |
|----------------|----------------------------------|
| Your PO number | Your VAT/TVA/IVA/BTW/MWST number |
|----------------|----------------------------------|

Please charge my credit card

- VISA Mastercard

| | | |
|-------------------|---------------------|-----------|
| Card number | Expiry date (MM/YY) | CV code |
| | / | |
| Cardholder's name | | Signature |
| Billing address | | |
| Postcode | Country | |

- We enclose our cheque payable to Berg Insight AB
- Please invoice me

| | |
|-----------|------|
| Signature | Date |
|-----------|------|

Reports will be dispatched once full payment has been received. For any enquiries regarding this, please contact us. Payment may be made by credit card, cheque made payable to Berg Insight AB, Viktoriagatan 3, 411 25 Gothenburg, Sweden or by direct bank transfer to Skandinaviska Enskilda Banken, 106 40 Stockholm, Sweden.

Account Holder: Berg Insight AB
 Account number: 5011 10 402 80
 BIC/SWIFT: ESSESESS
 IBAN: SE92 5000 0000 0501 1104 0280

