

Wireless M2M and Mobile Broadband Devices

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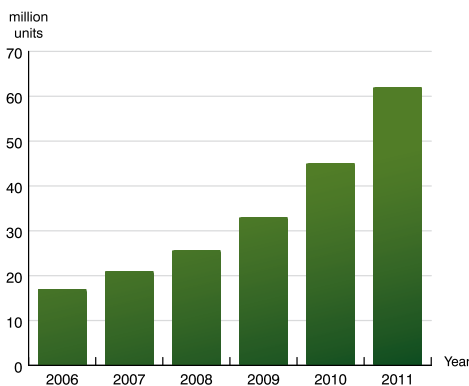


Cars and notebooks PCs to spearhead new wireless advance

Berg Insight expects that one in two cars and one in three notebooks PCs shipped worldwide in 2011 will have cellular communication capabilities. This will create a massive market for wireless M2M communication and mobile broadband data devices, exceeding 100 million units per annum. During 2007, Berg Insight estimates worldwide shipments in these categories to reach 23 million units.

Machines and devices can be wireless connectivity enabled by connecting a standalone M2M communication terminal, by integrating a wireless M2M module, or through integrating wireless chipsets at the design stage. Fully approved and certified standalone M2M communication terminals are designed to fit projects where the available integration time is short, when upgrading existing applications with wireless connectivity or when the production volume is low. Plug and play integration using only cable connectors ensure rapid integration at low cost. For higher volume and space-sensitive applications, integration of M2M modules becomes more attractive despite the longer integration time and needs for end-product certification, because the solution cost per unit is reduced. Although wireless chipset solutions and reference designs are available from several technology providers, the extensive integration and certification efforts involved require very high device production volumes to become cost effective.

While M2M module sales in Europe have largely been driven by major utility AMM projects, the vehicle telematics market is likely to become the primary application for modules as European consumers continue to adopt aftermarket vehicle tracking and pay-as-you-drive systems in order to reduce insurance premiums. The real potential, however, can be unbleached towards the end of the decade when the eCall initiative to make automatic emergency call services standard for all new passenger cars is expected to ►



Worldwide wireless M2M module shipments 2006–2011

► be implemented. In North America, consumer M2M services have gained mainstream acceptance with the success of GM's OnStar safety and security services. Other manufacturers are likely to introduce similar concepts in order to remain competitive. With growing adoption of aftermarket and OEM telematics systems on many markets outside North America and Europe as well, two out of three vehicles sold worldwide in 2011 can be equipped with a telematics system relying on M2M modules.

Mobile broadband modules and terminals are used in numerous applications, from WWAN connectivity adapters for notebook computing to backup gateways for corporate communications networks. Although many M2M segments will eventually adopt 3G modules, the notebook and UMPC segment will most likely pioneer the use of the latest and fastest cellular modules in order to compete with other wireless networking standards. The major PC card vendors Option, Novatel Wireless and Sierra Wireless were the first to offer embedded modules for factory integration. Furthermore Ericsson and Nokia have launched broadband modules primarily aimed at the notebook segment. Most major notebook vendors have already launched models with embedded broadband modules. In 2011, one out of three notebooks and UMPCs may well have built in broadband modules to complement local area wireless connectivity adapters.

This report answers the following questions:

- Which are the fastest growing segments for embedded cellular communication technology?
- What is the expected growth rate for wireless M2M and mobile broadband data devices?
- At what rate is HSPA adopted as an Internet access technology by notebook manufacturers?
- When will cellular GPS safety and security equipment become a standard feature in mass market cars?
- Will there be more convergence between mobile broadband and wireless M2M products?
- What are the differences and commonalities between the European and North American markets?
- Which are the latest wireless and GPS chipsets targeting the embedded market?
- Who are the leading suppliers of wireless M2M modules, modems and terminals?
- What HSPA propositions does Ericsson and Nokia have for notebook PC vendors?

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Glossary



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