M2M Research Series

Fleet management and Wireless M2M

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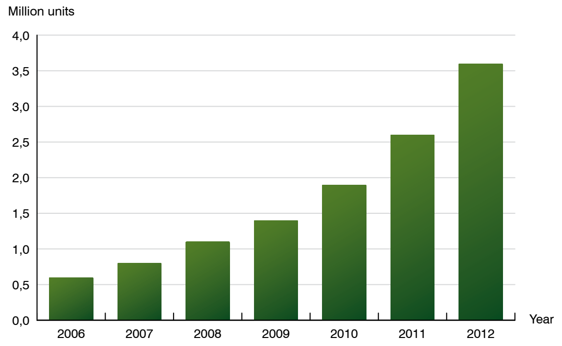
BERG INSIGHT

Good times ahead for European fleet management providers

Fleet management is an ambiguous term used in reference to a wide range of solutions for different vehicle-related applications. Berg Insight's definition of a fleet management solution is vehicle-based systems that incorporate data logging, satellite positioning and data communication to a backoffice application. The history of fleet management solutions goes back several decades. On-board vehicle computers first emerged in the 1980s and were soon connected to various satellite and terrestrial wireless networks. Today mobile networks can provide ubiquitous online connectivity at a reasonable cost and mobile computing technology delivers very high performance, as well as excellent usability. All of these components combined enable the delivery of vehicle management, transport management, driver management and mobile workforce management applications linking vehicles and enterprise IT systems. Furthermore the same technology platform can also be used for electronic toll collection.

Berg Insight is of the opinion that the European fleet management market has entered a period of solid growth that will last for several years to come. There is a general sentiment of optimism in the industry, underpinned by increasing awareness of the benefits with telematics among fleet owners. With penetration coming from a low level it will take considerable time before the market reaches a point of saturation. Currently, Berg Insight estimates that nearly 30,000 European businesses with more than 50 employees – over 12.5 percent – are now using the technology on at least parts of their vehicle fleets. This means that fleet management has now entered the early majority stage of the innovation adoption curve among large businesses. Ultimately Berg Insight expects that virtually all new commercial vehicles sold will be equipped with some form of mobile network connectivity.

Approximately 27.4 million commercial vehicles are owned by enterprises in Europe, with another 1.4 million vehicles being owned by public entities. About 20 percent of the light commercial vehicles and 5 percent of the medium and heavy trucks are in private ownership, which includes vehicles owned by private persons but used for business purposes. Altogether enterprises and public entities own approximately about 19.9 million light commercial vehicles, 6.8 million trucks and 0.7 million buses and coaches in Europe. Furthermore Berg Insight estimates that there are about 2.5 million heavy trailers or semi-trailers, 2.0 million construction equipment units and 3.0 million agriculture equipment units. Between 2007 and 2012, Berg Insight forecasts that the penetration rate for fleet management in Europe will increase from 2.8 percent to 11.3 percent at the end of the period.



Installed base of fleet management units (EU27+2 2006–2012)

A diversity of solution providers compete for the top positions on the European fleet management market. Companies range in size from GE Equipment Services – a part of one of the world's largest corporations – to GPS-Buddy, a start-up company thriving on a partnership with GPS product vendor Garmin. Leading technology companies like Qualcomm and TomTom are also active market players, as well as the infrastructure group Abertis through its French motorway operator Sanef's subsidiary Masternaut. Cybit, Minorplanet and Navman Wireless have emerged as leaders from the advanced UK market, while Transics and Punch Telematix originate from Belgium. Two South African companies – Digicore and TeliMatrix/OmniBridge (best know for the VDO Fleet Manager range) – have also risen to prominent market positions backed by a strong domestic market and international reach. Furthermore truck OEMs including Mercedes-Benz/Daimler, Volvo Trucks and Scania are significant players in the heavy truck segment.

This report answers the following questions:

- Why is the fleet management market maturing right now and what is driving adoption?
- What is the geographical and ownership structure of commercial vehicle fleets in Europe?
- Which are the main players involved in the fleet management value chain?
- Who are the leading international and regional providers of fleet management solutions in Europe?
- How will the consolidation of the industry continue to evolve?
- What OEM telematics propositions are offered by the leading manufacturers of trucks, trailers and construction equipment?
- How is the introduction of the digital tachograph affecting demand for remote communication in the heavy transport industry?

Table of Contents

About the Author

Tobias Ryberg is founding partner of Berg Insight and principal analyst. He is an experienced analyst and author of numerous articles and reports about telecom and IT for leading Swedish and international publishers. The Fleet Management and Commercial Vehicle telematics market has been his major research area for the past 4 years.

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Fleet Management and Wireless M2M is the foremost source of information about the Commercial Vehicle Telematics and Fleet Management 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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