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

This strategic research report from Berg Insight provides you with 100 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 leading providers of aftermarket vehicle tracking solutions.
- **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.

**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 summaries of our research with detailed forecasts for the Global and European wireless M2M markets, respectively.

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Where is the European telematics market headed?

Telematics is a broad term that may be applied to a wide range of automotive IT solutions. Berg Insight’s definition of a car telematics solution in this report is an automatic system designed for passenger cars which incorporate some form of wireless communication via a wide area network. The history of car telematics can be traced back to the first stolen vehicle tracking systems based on RF communication using unlicensed frequency bands, which appeared on the market in the 1980s. Subsequently mobile networks have enabled true online connectivity with two-way communication at the same time as GPS technology has been commoditised to the extent that high-accuracy satellite positioning can be integrated into virtually any device. Today a standard telematics unit features GPRS, GPS and frequently also some kind of interface to the electronics systems of the vehicle. This kind of device may be used as a platform for one or several types of applications.

Several categories of car telematics applications are today offered on a commercial basis. These include eCall and driver assistance, SVR, motor insurance telematics, leasing and rental fleet management and vehicle diagnostics. eCall and driver assistance applications deliver value in the form of improved safety and better convenience when travelling, SVR facilitates recovery of the car in case of theft and frequently entitles the owner to insurance benefits. Motor insurance telematics combines SVR with innovative business models such as PAYD (Pay-As-You-Drive). Leasing and rental fleet management gives owners better control over hired-out vehicles and enables new forms of contracts. Vehicle diagnostics allows car manufacturers, dealers and workshops to improve their service offering to car owners.

The automotive industry has two traditional tracks for new innovations to reach the market. One is the car manufacturers (OEMs) who can offer new functionalities as factory-installed standard or optional features. The other is aftermarket vendors that develop products which can be installed by car-owners regardless of brand or model. In many cases there is a parallel development of both OEM and aftermarket products. Currently the European car telematics market

-dominated by aftermarket products with most OEMs showing very limited interest in developing any services by themselves. Outside Europe there is significantly more OEM activity, with GM OnStar in the US being the prime example.

The leading providers of aftermarket vehicle tracking solutions in Europe are a mix of national players with very strong positions on their local markets and pan-European players, operating directly or through resellers on several markets. Companies in the first category include the LoJack distributors TRACKER, Traqueur and Detector in the UK, France and Spain and Central Eastern European players such as AutoGuard, Caesar Satellite and SECAR in Poland, Russia and the Czech Republic. Trafficmaster in the UK also ranks as a significant player on that market. The second category comprise Italy’s three leading GSM/GPS telematics providers Cobra, MetaSystem and Viasat which have all expanded into foreign markets through direct representation or distributors. In addition to the companies mentioned above there are numerous players of all sizes offering vehicle tracking products in individual countries.

OEM telematics propositions have so far largely failed to make a significant impression on the European market. Availability is still restricted to a handful of brands and models on selected markets. PSA and BMW are the most active players in the market, bundling telematics services with navigation, audio and Bluetooth handsfree products. Volvo Cars continues to expand its service offering to new European countries even though customer demand has proven weak. The Fiat Group has shown renewed interest in the telematics market with the Tema.Mobility initiative and can be expected to launch new services on the platform when it becomes available. Premium brands such as Porsche, Jaguar and Land Rover are focusing their telematics efforts on OEM SVR solutions.

This report answers the following questions:

- What are the dynamics behind developments in the European car telematics industry?
- What is the current status of the eCall initiative?
- Why is motor insurance telematics successful in Italy?
- What are the main trends on the SVR market?
- How is RF tracking technology standing up against GSM/GPS?
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- How is the OEM telematics value chain evolving?
- What are the current car telematics propositions from Europe’s main car brands?
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Glossary
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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