Fleet Management in Europe

Fleet management in Europe is the seventh consecutive report from Berg Insight analysing the latest developments on the fleet management market in this region.

This strategic research report from Berg Insight provides you with 150 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.

Highlights from the seventh edition of this report:

- **Insights** from 40 new executive interviews with market leading companies.
- **New** data on vehicle populations and commercial fleets in Europe.
- **Comprehensive** overview of the fleet management value chain and key applications.
- **In-depth** analysis of market trends and key developments.
- **Updated** profiles of 67 aftermarket fleet management solution providers.
- **Summary** of OEM propositions from truck, trailer and construction equipment brands.
- **Revised** market forecasts lasting until 2016.

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 smart 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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A second wave of market consolidation anticipated for 2013

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 a vehicle-based system that incorporates 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.

A group of international aftermarket solution providers have emerged in the Netherlands, Belgium and Germany. The number of fleet management solutions as a part of their product portfolio. Mercedes-Benz, Volvo and Scania launched their first products in the 1990s and followed by MAN in 2000, Renault Trucks in 2004, DAF Trucks in 2006 and Iveco in 2008. The products are all supporting the FMS standard and can generally be deployed in mixed fleets even if some functionality can be brand-specific. A major trend in the past year has been the announcements of standard line fitment of fleet management solutions.

All major truck manufacturers on the European market offer OEM telematics solutions as a part of their product portfolio. Berg Insight anticipates that a second wave of consolidation is likely to happen during 2012 and 2013. The latest transaction was done in June 2011 when Transics acquired the European activities of CarrierWeb. Francisco Partners acquired Masternaut in April 2011 forming the leading player in Europe from the Masternaut and Cybit operations. Another acquisition was done by Vehco in Sweden that acquired Elomobile in France in March 2011. Trimble acquired Punch Telematix in July 2010 and DigiCore acquired Minorkom in the UK along with the associated busineses in the Netherlands, Belgium and Germany.

Nine major merger and acquisition activities took place in Europe during 2010 and the first half of 2011. In the past twelve months there has been a considerable slowdown of activities and no major events occurred. Berg Insight anticipates that a second wave of consolidation is likely to start in 2013. The latest transaction was done in June 2011 when Transics acquired the European activities of CarrierWeb. Francisco Partners acquired Masternaut in April 2011 forming the leading player in Europe from the Masternaut and Cybit operations. Another acquisition was done by Vehco in Sweden that acquired Elomobile in France in March 2011. Trimble acquired Punch Telematix in July 2010 and DigiCore acquired Minorkom in the same month Minorplanet in the UK along with the associated businesses in the Netherlands, Belgium and Germany.

Is the European fleet management market back on a growth track after the economic crisis?

Will the FM industry consolidate further during 2012 and 2013?

What is the geographical and ownership structure of commercial vehicle fleets in Europe?

Who are the leading international and regional providers of aftermarket fleet management solutions in Europe?

What offerings are available from truck, trailer and construction equipment OEMs?

What impact will the launch of standard factory installed FM systems from the OEMs have on the market?

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Glossary
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**Fleet Management in Europe** is the foremost source of information about the Commercial Vehicle Telematics and Fleet Management market in this region. 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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