M2M Research Series

The Global Wireless M2M Market

The Global Wireless M2M Market is the sixth consecutive report analysing the latest market developments in all regions of the world.

This strategic research report from Berg Insight provides you with 260 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.

Highlights from the sixth edition of the report:

- **360-degree** overview of the M2M ecosystem.
- **Updated profiles** of the main suppliers of wireless M2M modules and software platforms.
- **Reviews** of the M2M strategies of leading mobile operators.
- **Summary** of industry trends in key vertical market segments.
- **Statistical data** on M2M subscribers in Europe, the Americas and Asia-Pacific.
- **Extensive** global and regional market forecasts lasting until 2019.

Order now!

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

See inside for further details →

Berg Insight's M2M Research Series

What are the key business opportunities in the emerging wireless M2M/IoT market? Berg Insight's M2M Research Series is a unique series of 20 market reports published on a regular 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.

www.berginsight.com

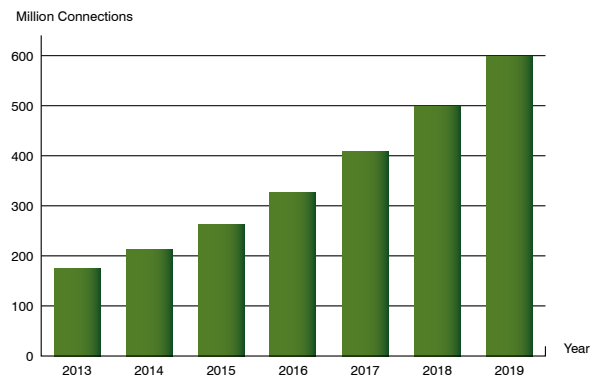
BERG INSIGHT

Connected management is the next mega-trend in M2M

The global wireless M2M market performed well in 2013, displaying growth in all major world regions and vertical segments. Berg Insight estimates that shipments of cellular M2M devices increased by 13.5 percent to a new record level of 68.0 million units. Adjusted for churn, this resulted in net additions of 33.4 million M2M connections in 2013, taking the worldwide number of cellular M2M subscribers to an estimated 176.4 million. Until 2019, Berg Insight forecasts that shipments of cellular M2M devices are forecasted to grow at a compound annual growth rate (CAGR) of 21.1 percent to reach 207.8 million units. Due to the wide adoption of wireless M2M technology across many industries, a substantial share of M2M device shipments is now generated from replacement sales. Furthermore there will be a growing number of dormant devices in segments such as automotive and consumer electronics that never become activated. As a result the net increase of M2M subscribers will be substantially lower than M2M device shipments. Berg Insight forecasts that the number of cellular M2M connections will grow at a compound annual growth rate (CAGR) of 22.9 percent between 2014 and 2019 to reach 599.7 million at the end of the period.

M2M and connected devices are widely recognised as key future growth markets among the leading players in the mobile telecommunications industry. China Mobile reported 32.0 million M2M subscribers in China at the end of 2013. Vodafone is the largest international provider of M2M connectivity, as well as a major regional player in Europe, with a reported subscriber base of 15.2 million. AT&T was number one in the US market reporting 16.3 million M2M subscribers, ahead of Verizon Wireless at approximately 9.0 million. Telefónica ranked number five worldwide, with 8.6 million reported M2M subscribers in Europe and Latin America, barely ahead of China Unicom with approximately 8.5 million. Other top ten players included Softbank/Sprint, Deutsche Telekom, Telenor and America Móvil with between 6.7 million and 8.0 million M2M subscribers each.

The mega-trend driving technology adoption in Europe and North America is what Berg Insight calls the concept of connected management. The IT-revolution has created new opportunities to collect and analyse data for the purpose of managing objects and behaviours. Connected management is based on the connection of remote devices to applications for the purpose of managing assets & products, costs & revenues, relationships & behaviour etcetera. The connected car is a typical application area where automobile manufacturers develop solutions enabling themselves and the driver to manage the vehicle and the driving experience through a range of applications. Connected fleets is the underlying trend for most other vehicle-based applications that enable fleet operators and external stakeholders such as governments, insurance companies and financial service providers to manage vehicles, operations, risks and revenues associated to the vehicle such as taxes and insurance premiums. The Connected Enterprise is emerging as a blueprint for corporate management, based on the vision that every asset and product should be directly linked to the enterprise network, feeding data in real-time to relevant IT-systems.



Cellular M2M network connections (World 2013-2019)

China has emerged as the world's largest market for wireless M2M communications in terms of installed base and recorded massive growth rates over the past years. The Chinese M2M market is strongly influenced by centralised planning by the national government. During the first half of 2012, the Chinese government announced a series of initiatives for the IoT sector as part of the 12th five-year plan for the period 2011–2015. IoT was selected as one of the main national strategic emerging industries, with a particular focus on smart sensors and RFID technologies. Cellular M2M technology is also finding many applications, particularly in smart grid, intelligent transportation and public safety. China's national utility State Grid began deploying smart meters on a large scale during 2011 and expects to cover the vast majority of its customers by the end of 2015. During 2012 and 2013, the utility procured around 18 million data concentrators for the rollout, which Berg Insight believes accounted for a significant part of the reported net additions of M2M subscribers in China during the period.

This report answers the following questions:

- How will the global wireless M2M market evolve over the next five years?
- What are the main drivers behind growth in major regions and industries?
- What is the status of M2M in emerging markets?
- What are the leading global mobile operators' strategies for the M2M market?
- Which are the strategic options for moving up the M2M value chain?
- Who are the leading providers of M2M connectivity and application enablement platforms?
- How are 3G/4G technologies transforming the M2M device market?
- How can CSPs fulfill global connectivity needs?

Table of Contents

About the Author

Tobias Rydberg is co-founder and principal analyst responsible for the M2M research series. He is an experienced analyst and author of numerous articles and reports about IT and telecom for leading Swedish and international publishers. All major vertical market segments for Wireless M2M have been his major research area for the past 11 years.

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. Berg Insight also offers detailed market forecast databases and advisory services. Our vision is to be the most valuable source of intelligence for our customers.

Who should buy this report?

The Global Wireless M2M market is the foremost source of information about all major vertical markets for wireless M2M. Whether you are a module vendor, telematics vendor, utility, vehicle manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

Related products

- mHealth and Home Monitoring
- Smart Metering in Europe
- Smart Homes and Home Automation
- Trailer and Cargo Container Tracking

Order form — TO RECEIVE YOUR COPY OF THE GLOBAL 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

BERG INSIGHT