

The European Wireless M2M Market

The European Wireless M2M Market is the third consecutive report analysing the market for mobile network machine-to-machine communication in Europe.

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- **Wireless** M2M market data per country and estimated market shares for network operators.
- **Summary** of important regional and vertical market trends.
- **Revised** market forecasts lasting until 2013.
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- **Case** studies of major deployments of GPRS in smart metering projects.



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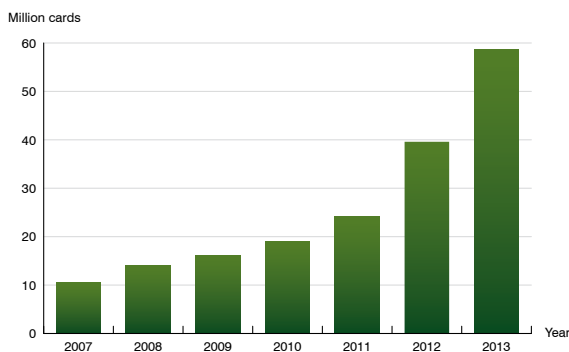
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What are the latest trends on the European wireless M2M Market?

Berg Insight estimates that the number of active SIM-cards in use for wireless M2M applications in EU23+2 will reach 14.1 million at the end of 2008. This means total number of mobile network connections used by machines now equal that of a medium-sized European country. Until 2013, the number of wireless M2M connections is forecasted to grow at a compound annual growth rate of 32.9 percent, reaching 58.6 million at the end of the period. Currently energy meters are estimated to account for the largest installed base, ahead of private and commercial vehicles. By 2013 the automotive sector is projected to account for 61 percent of the number of wireless M2M connections in Europe. Energy meters will remain the second largest application area ahead of security alarms and POS-terminals. Growing adoption of remote equipment monitoring will also generate a substantial number of wireless M2M connections for other types of assets and products from virtually all manufacturing industries. In light of the recent economic turmoil it is however important to note that the wireless M2M market is sensitive to fluctuations in shipments of products such as motor vehicles, energy meters, security alarms, POS-terminals and miscellaneous machinery and equipment.

Adoption of wireless M2M has been growing rapidly across Europe in the recent years. Berg Insight estimates that the number of active SIM-cards in use for wireless M2M applications in EU23+2 was 12.3 million at the end of Q2-2008. This corresponded to 2.2 percent of the total number of SIM-cards in the region. Sweden and Finland stood out the rest of the European countries with M2M accounting for 13.4 percent and 7.7 percent respectively of all mobile connections. Other countries with high ratios of M2M connections were Denmark with 3.8 percent and Spain with 2.7 percent. All other countries were in the range of 1–2 percent. In absolute terms, Italy constituted the largest geographical market with 1.9 million connections, followed by Germany and the UK with 1.8 million and 1.7 million respectively. Other markets with one million connections or more were Sweden, Spain and France.



Active wireless M2M SIM-cards in Europe (2007–2013)

Even if wireless M2M is a B2B market in the sense that products and services are sold to enterprise customers, the underlying demand is in fact to a large extent driven by consumer markets. That is particularly true for the largest projects that involve hundred thousands of devices. Nine out of the ten largest wireless M2M deployments in Europe are consumer-oriented. These include smart metering projects in Sweden, Finland, Italy and the Netherlands; pan-European vehicle tracking solutions for private vehicles; OEM car telematics solutions from major car brands and the largest solution for monitored security alarms in Europe. Only the German truck road charging system Toll Collect cannot be classified as a consumer-oriented application.

Berg Insight believes that the wireless M2M network service value chain will undergo a significant transformation in the coming years. Until recently the world's largest mobile operator groups have shown limited interest in M2M. Top global players such as Vodafone, Telefónica and Deutsche Telekom have not yet formulated any official group strategies for exploiting the new market opportunities. Current business development and marketing efforts are primarily being made by relatively small teams on individual markets. One notable exception is Telenor which is actively addressing the international M2M market through the new business unit Telenor Connexion, launched in October 2008.

This report answers the following questions:

- Which are the largest and most successful wireless M2M applications in Europe?
- What are the differences and similarities in how M2M is adopted in different European countries?
- Who are the leading providers of GPRS-based vehicle tracking, fleet management and smart metering solutions?
- How is fixed to mobile substitution affecting the POS-terminal and security alarm segments?
- How are the mobile operators positioning themselves on the M2M market?
- Which mobile operators have the highest share of M2M connections in their networks?
- Which are the main alternative wireless M2M communication providers in Europe?
- What impact will initiatives such as Telenor Connexion and M2M Alliance have on the market?
- How will the wireless M2M market be affected by the economic downturn?

► Table of Contents

1 Introduction to wireless M2M and the European market	3.2 Mobile operator market shares	5.3.5 Minorplanet: Renewed international focus after financial turnaround
1.1 Introduction	3.3 Vertical market trends	5.3.6 MiX Telematics: New global brand for telematics services
1.2 Devices	3.3.1 Car telematics: Anticipated slowdown before eCall comes to the rescue	5.3.7 Navman Wireless: Fast growing international fleet management provider
1.2.1 Chipsets, modules and terminals	3.3.2 Fleet management: Mixed impact from economic downturn	5.3.8 Qualcomm Enterprise Services: Global provider of integrated M2M solutions
1.2.2 Device design and machine integration	3.3.3 Smart metering: Regulation driven rollouts to go ahead as planned	5.3.9 TomTom WORK: Achieved 50,000 subscribers milestone in Q2-2008
1.2.3 M2M device value chain	3.3.4 Other applications: Poor investment climate to hamper growth	5.3.10 Transics: Pan-European heavy truck and transport telematics provider
1.2.4 Wireless M2M module vendors	3.4 Regional market trends	5.4 OEM fleet telematics propositions
1.3 Networks	3.4.1 Benelux and France	5.4.1 Daimler FleetBoard
1.3.1 GSM/HSPA networks and other wireless infrastructure	3.4.2 Central Eastern Europe	5.4.2 Volvo Dynafleet
1.3.2 Mobile network capabilities	3.4.3 Germany, Switzerland and Austria	5.4.3 OEM van fleet telematics propositions in the UK
1.3.3 Adapting mobile networks for M2M communication	3.4.4 Italy, Spain and Portugal	
1.3.4 Ecosystem	3.4.5 Northern Europe	
1.3.5 Business models	3.4.6 UK and Ireland	
1.4 Applications	3.5 Industry trends and recommendations	
2 Mobile operators and M2M communication providers	3.5.1 Building a sustainable mobile data business	
2.1 Vodafone Group	3.5.2 Business models and pricing	
2.2 Deutsche Telekom	3.5.3 Industry transformation trends	
2.2.1 T-Mobile		
2.2.2 Toll Collect	4 Private vehicles	
2.3 France Telecom	4.1 The European private vehicle market	
2.3.1 FT Group and Orange M2M strategy	4.2 Passenger car telematics	
2.3.2 M2M connectivity reseller partnerships in France and the UK	4.2.1 eCall and driver assistance	
2.3.3 Mobistar	4.2.2 Stolen vehicle recovery	
2.4 Telefónica Group	4.2.3 Motor insurance telematics	
2.4.1 Strategy and organisation for M2M	4.2.4 Leasing and rental fleet management	
2.4.2 Market position	4.2.5 Vehicle diagnostics	
2.5 Telenor	4.3 Aftermarket vehicle tracking solutions	
2.5.1 Telenor Connexion: A new international M2M operator	4.3.1 Octo Telematics: The European leader in motor insurance telematics	
2.5.2 Telenor Cinclus: End-to-end provider of smart metering	4.3.2 Cobra Automotive Technologies: Pan-European SVR provider	
2.6 Belgacom	4.3.3 LoJack distributors: TRACKER, Traqueur and Detector	
2.7 KPN	4.4 OEM car telematics solutions	
2.8 SFR	4.4.1 BMW ConnectedDrive	
2.9 TDC	4.4.2 PSA RT3/RT4/Navidrive	
2.10 Telekom Austria	4.4.3 Volvo On Call	
2.11 TeliaSonera	4.5 The European eCall initiative	
2.12 Wireless M2M communication aggregators	4.5.1 A pending political process	
2.12.1 Aspider Solutions	4.5.2 Standardisation work	
2.12.2 Eutelsat	5 Commercial vehicles	
2.12.3 Kuantic	5.1 The European commercial vehicle market	
2.12.4 Jasper Wireless	5.2 Fleet management solutions	
2.12.5 Maingate	5.2.1 Vehicle management	
2.12.6 Mdex	5.2.2 Driver management	
2.12.7 Mobius Networks	5.2.3 Transport management	
2.12.8 Netsize	5.2.4 Mobile workforce management	
2.12.9 RAM Mobile Data	5.2.5 Electronic toll collection	
2.12.10 Stream Communications	5.3 Key market players	
2.12.11 Vianet	5.3.1 Cybit: Growing through acquisitions	
2.12.12 Wireless Logic	5.3.2 Digicore: A global vehicle tracking solution provider	
2.12.13 Wyless	5.3.3 Garmin: Taking an indirect approach to the fleet management market	
3 Market forecasts and trends	5.3.4 Masternaut: The European fleet telematics leader	
3.1 Summary of the European wireless M2M market		
		6 Electricity and gas meters
		6.1 The European energy distribution market
		6.1.1 Electricity networks
		6.1.2 Gas networks
		6.2 Smart metering
		6.2.1 AMM applications
		6.2.2 Advanced metering infrastructure
		6.2.3 Regulatory environment
		6.3 Smart metering industry players
		6.3.1 Metering industry players
		6.3.2 Energy companies
		6.3.3 IT and telecom companies
		6.4 GPRS communication and smart metering
		6.4.1 Fortum Sweden rolls out 600,000 GPRS meters with Telenor Cinclus
		6.4.2 TRE-FOR deploys GPRS smart metering with TDC in Denmark
		6.4.3 GPRS backhaul for nationwide PLC smart meter systems in Italy and France
		7 Other market segments
		7.1 POS-terminals
		7.1.1 Key industry players
		7.1.2 Fixed-to-mobile substitution trend for POS-terminals
		7.1.3 Mobile network POS-terminal communication solutions
		7.2 Security alarms
		7.2.1 Key industry players
		7.2.2 Wireless alarm signalling
		7.2.3 Mobile network alarm communication solutions
		7.3 Miscellaneous assets and machinery
		7.3.1 Konecranes Fleet Management System
		7.3.2 QES GlobalTRACS construction equipment monitoring
		7.3.3 Sensile Technologies tank monitoring
		Glossary



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. All major vertical market segments for Wireless M2M have been his major research area for the past 5 years.

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