

The Global Automotive OEM Telematics Market



The Global Automotive OEM Telematics Market is a comprehensive strategy report from Berg Insight analysing the latest developments on the connected car market worldwide.

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- **Insights** from numerous executive interviews with market leading companies.
- **New data** on car populations and new car registrations worldwide.
- **Comprehensive overview** of the car OEM telematics value chain and key applications.
- **In-depth analysis** of market trends and key developments.
- **Detailed profiles** of 17 major car OEMs and their telematics propositions.
- **Market forecasts** by region lasting until 2020.



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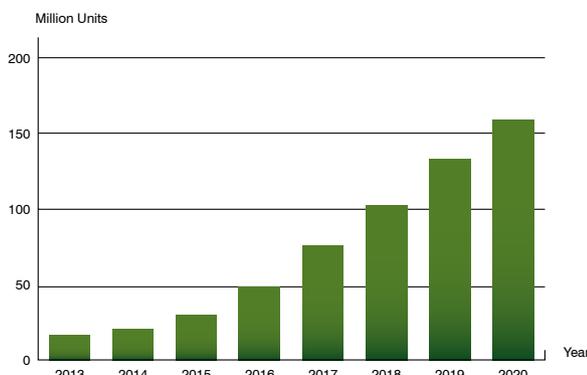


The installed base of active OEM embedded telematics units to reach 159 million worldwide in 2020

Telematics is a broad term that may be applied to a wide range of automotive connectivity solutions. Berg Insight's definition of a car telematics system in this report is an automatic system designed for passenger cars that incorporates some form of cellular communication. 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 satellite positioning can be integrated into virtually any device. Automotive manufacturers can choose between several connectivity options when creating connected car services, which are not mutually exclusive. The main options today are embedded telematics devices, tethered devices and integrated smartphones. With embedded systems the connectivity and intelligence is built into the car. In the case of tethered devices, the connectivity is provided by an external modem or mobile phone while the intelligence is built into the car. Solutions relying on integrated smartphones leverage the connectivity and intelligence built into the smartphone. Car manufacturers often use a combination of these options to support different customer needs and keep pace with the rapid development of mobile technology.

Several categories of car telematics applications are now offered on a commercial basis by most leading car manufacturers. Examples include eCall and roadside assistance, stolen vehicle tracking (SVT), vehicle diagnostics, connected navigation and infotainment, as well as convenience applications. Convenience applications mainly rely on embedded telematics devices to enable remote control of vehicle functions such as door lock/unlock, vehicle preconditioning (heating or cooling of the passenger compartment before a trip) and finding the last parking position. Several other applications also exist, for instance usage-based insurance, leasing and rental fleet management, as well as electronic toll collection and road charging. However, these applications are usually offered by aftermarket service providers.

After many years of development and false starts, telematics has gained momentum and virtually all of the world's leading car manufacturers have launched mass-market services in key regions.►



Installed base of active OEM embedded telematics units
(World 2013-2020)

►The drivers behind the adoption of OEM telematics are both commercial and regulatory. Regulatory initiatives related to safety and security will have a decisive effect on the adoption of OEM telematics in Europe and Latin America. The EU's eCall initiative and Russia's ERA-GLONASS will make an automatic emergency call device a mandatory safety feature in all newly produced cars. Brazil's government is pushing car manufacturers to install security tracking devices on all vehicles sold in the country through the so called CONTRAN 245 mandate. In North America, commercial services have driven adoption of OEM telematics services that have evolved from being a differentiator to a mainstream feature offered by most car brands.

Berg Insight estimates that almost 12 percent of all cars sold worldwide in 2013 were equipped with an OEM embedded telematics system. North America is the most advanced market with an attach rate of around 30 percent. Other developed markets such as Europe, Japan and South Korea currently have attach rates of 11-12 percent. China, which has been the world's largest market for new car sales since 2010, is now also becoming a major market for telematics services with an attach rate of nearly 6 percent in 2013. In other regions, the attach rate is only 1-2 percent. GM and BMW are the leading adopters of embedded telematics, widely offering the technology as a standard feature. GM has been the leading provider of telematics for more than a decade, offering the technology as an integral part of its value proposition in North America and China. Other major car brands offering embedded telematics on a broad scale include Hyundai, PSA, Toyota, Renault and Volvo.

Berg Insight estimates that total shipments of embedded car OEM telematics systems reached 8.4 million units worldwide in 2013. Growing at a compound annual growth rate of 30.6 percent, the shipments are expected to reach 54.5 million units in 2020. The number of telematics subscribers using embedded systems is forecasted to grow at a compound annual growth rate of 38.1 percent from 16.6 million subscribers in 2013 to 158.9 million in 2020. However, by 2020 many users will only have access to safety services such as eCall. Berg Insight forecasts that the number of active subscribers using at least one additional premium telematics service will grow to about 112 million worldwide at the end of 2020.

This report answers the following questions:

- Which are the key OEM telematics applications?
- What is the current status of the car OEM telematics industry?
- How will regulatory developments affect the telematics industry?
- Which are the leading telematics service providers?
- How are mobile operators positioning themselves in the telematics value chain?
- How can smartphones be leveraged for telematics services?
- What telematics offerings are available from the leading car OEMs today?
- What business models are used by car OEMs?
- How will the market evolve in Europe, North America, Latin America, Asia-Pacific and MEA?

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