

# Security Applications and Wireless M2M

**Security Applications and Wireless M2M** is the third consecutive report from Berg Insight analysing the latest developments among the key applications for wireless M2M communication in the security industry.

This report in the M2M Research Series provides you with 120 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:***

- **Identify** key players on the European security market.
- **Learn** about the latest propositions from leading security application vendors.
- **Understand** the opportunities and challenges for stolen vehicle tracking services.
- **Anticipate** future drivers for increasing penetration and replacement sales for alarm systems.
- **Realize** the commercial potential of emerging segments including leisure vehicle and boat tracking.
- **Predict** future trends in lone worker protection services.



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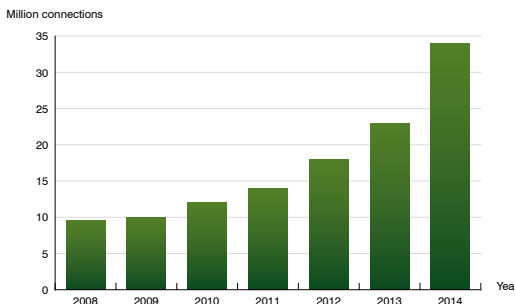


## What are the latest trends on the market for connected security applications in Europe?

The private security sector is a global industry comprising services and solutions such as manned guarding, alarm system integration and monitoring, cash and valuables handling as well as various services like consulting and private investigations. The global market value of the security industry grew to an estimated € 110 billion in 2009. The more mature European and North American markets still dominate the industry with a combined market share of close to 70 percent. In 2009, the European market value declined slightly to about € 45 billion. The long-term annual growth rate is estimated to be between 7 and 9 percent globally, and between 6 and 8 percent in Europe and the US. Historically, annual growth has exceeded GDP by a few percentage points each year.

Alarm systems and vehicle tracking systems for passenger cars and commercial vehicles are the key applications for wireless M2M communication in the security industry. Alarm systems are off-the-shelf security systems for small businesses and private homes. These are divided into two main categories – local alarms and monitored alarms. The simplest type of local alarm only reacts to activation by ringing bells to alert the surroundings and scare off intruders. Monitored alarms are connected to an alarm receiving centre (ARC). Around 20 percent of the alarm systems in Europe are monitored by an ARC. Monitored alarm systems are dependent on reliable communication networks. There is a significant untapped potential in the residential market segment that can be fulfilled with the latest generation of monitored alarm systems with GSM/GPRS or dual signalling technology.

Vehicle tracking and recovery is the second major application area for wireless M2M communication in the security industry. Devices combining GPS and GSM/GPRS technologies enable monitoring services for any mobile object. Passenger cars and commercial vehicles constitute the main target markets by virtue of numbers and individual value, but there are also many niche markets such as construction equipment and plant machinery as well as leisure vehicles and boats. Similar hardware designs also constitute the on-board platform for fleet management solutions and the tracking capabilities of these systems enable basic security applications. ►



Cellular wireless M2M connections for security applications (Europe)

► What distinguishes vehicle tracking and recovery system from fleet management systems is the monitoring and response service of the secure monitoring centre that is linked to GPS-aided security systems.

Today, only a handful car OEMs offer telematics solutions in a few markets in the EU. Berg Insight anticipates that additional brands will launch OEM telematics solutions on the European market in response to the eCall initiative within the EU. The European Commission has a strong commitment to introducing eCall as a standard feature in all new cars and recently set 2014 as the new target date for realising this vision – through regulations if necessary. Vehicle tracking and recovery is likely to become a key component for many OEM telematics systems in the next few years, especially for premium cars.

Several niche applications for wireless M2M are emerging in the security industry that have not yet reached substantial volumes. Personal security for lone workers is an application area offering significant growth opportunities in the medium and long term. Wearable integrated tracking and wireless communication devices can be used for protecting individuals. This area is mainly driven by stringent employee health and safety regulations in the UK, but other countries can also be expected to introduce similar laws in the future. Moreover, various forms of electronic monitoring of offenders are gradually being rolled out across Europe to reduce costs of running prisons and assist in the rehabilitation process.

Berg Insight forecasts that shipments of wireless M2M modules for security applications in EU27+2 will grow from 2.3 million in 2009 to nearly 22 million by 2014. At the same time, the number of alarm systems and tracking devices monitored from an alarm receiving centre and similar will grow from about 10 million in 2009 to 34 million by the end of 2014.

### This report answers the following questions:

- What is the potential market size for wireless M2M communication in the security industry?
- Which are the key applications that generate most benefits for the end customers?
- Why are leading alarm system providers investing in wireless technology?
- When will wireless connectivity become a standard feature in alarm systems?
- Who are the leading providers of aftermarket vehicle tracking solutions?
- What new applications for wireless M2M are emerging in the security industry?
- Are regular handsets suitable for lone worker protection services?

## ► Table of Contents

<b>1 Overview of the European security industry</b>	3.2.4 Transport management	4.6.2 Motorcycle tracking solutions
<b>1.1 Market overview</b>	3.2.5 Mobile workforce management and lone worker security	<b>4.7 The European leisure vehicle and boat market</b>
1.1.1 Security services	<b>3.3 Container tracking solutions</b>	4.7.1 Boat tracking solutions
1.1.2 Security systems	3.3.1 Intermodal shipping containers	
1.1.3 Small alarm systems	3.3.2 Overview of the container shipping industry	<b>5 People tracking</b>
1.1.4 Cash handling	3.3.3 Container tracking solutions	<b>5.1 Corporate people tracking and lone worker protection</b>
<b>1.2 Key industry players</b>	<b>3.4 Key fleet management solution providers</b>	5.1.1 Lone worker legislation
1.2.1 Group 4 Securicor	3.4.1 Cybit	5.1.2 Lone worker protection devices and services
1.2.2 Prosegur	3.4.2 Digicore	5.1.3 Electronic monitoring of offenders
1.2.3 Securitas	3.4.3 GE Asset Intelligence	<b>5.2 Consumer-oriented people tracking</b>
1.2.4 Tyco International	3.4.4 Masternaut	5.2.1 Mobile operator services
1.2.5 UTC Fire & Security	3.4.5 Minorplanet	5.2.2 Third party handset-based tracking services
	3.4.6 Qualcomm Enterprise Services	5.2.3 Dedicated GPS tracking devices and services
<b>2 Alarm systems</b>	3.4.7 Transics	<b>5.3 Company profiles</b>
<b>2.1 The European alarm systems market</b>	3.4.8 Volvo Group Dynafleet	5.3.1 Connexion2
2.1.1 Monitored alarm systems	<b>3.5 Satellite communication network operators</b>	5.3.2 GeoSentric
2.1.2 Alarm monitoring services	3.5.1 Globalstar	5.3.3 Navento Technologies
<b>2.2 Alarm signal transmission</b>	3.5.2 Iridium	5.3.4 Romad
2.2.1 Small alarm system technology overview	3.5.3 Orbcocom	5.3.5 SPOT
2.2.2 The EN 50131 norm for intruder alarm systems		5.3.6 Tramigo
2.2.3 Mobile network alarm communication solutions	<b>4 Car tracking and consumer asset tracking</b>	5.3.7 UbiEst
2.2.4 Market penetration for mobile network alarm communication	<b>4.1 The European passenger car market</b>	
<b>2.3 Company profiles</b>	<b>4.2 Passenger car telematics</b>	<b>6 Market forecasts and trends</b>
2.3.1 ADT Worldwide	4.2.1 Stolen vehicle recovery	<b>6.1 Market trends and drivers</b>
2.3.2 Group 4 Securicor	4.2.2 eCall and driver assistance	6.1.1 Alarm systems: GSM/GPRS complementing and replacing PSTN
2.3.3 Prosegur Activa	4.2.3 Motor insurance telematics	6.1.2 Fleet management: Mixed impact from economic downturn
2.3.4 Securitas Direct	<b>4.3 Insurance industry standards for vehicle tracking</b>	6.1.3 Car telematics: The EC sets 2014 as new target for introduction of eCall
2.3.5 United Technologies Corporation	4.3.1 Belgium	6.1.4 Lone worker protection: Market driven by UK legislation
<b>2.4 Visual security systems</b>	4.3.2 The Netherlands	6.1.5 Consumer asset tracking: Steady growth from diverse applications
2.4.1 Network cameras	4.3.3 Norway	<b>6.2 Market forecasts</b>
2.4.2 Digital video technology	4.3.4 United Kingdom	6.2.1 Alarm systems
2.4.3 Wireless network requirements	<b>4.4 Aftermarket vehicle tracking solutions</b>	6.2.2 Fleet management, commercial vehicle and asset tracking
2.4.4 Network camera vendors	4.4.1 MetaSystem/Octo Telematics	6.2.3 Car telematics
<b>3 Commercial vehicle and asset tracking</b>	4.4.2 Cobra Automotive Technologies	6.2.4 Lone worker protection services
<b>3.1 The European commercial vehicle market</b>	4.4.3 LoJack distributors: TRACKER, Traqueur and Detector	6.2.5 Consumer asset tracking applications
3.1.1 Commercial vehicle crime in Europe	<b>4.5 OEM car telematics solutions</b>	
<b>3.2 Fleet management solutions</b>	4.5.1 BMW ConnectedDrive	
3.2.1 Vehicle management	4.5.2 PSA Group RT3/RT4/Navidrive	
3.2.2 Security tracking	4.5.3 Volvo On Call	
3.2.3 Driver management	<b>4.6 The European motorcycle and moped market</b>	
	4.6.1 Motorcycle theft in Europe	

## Glossary

## About the Author



**André Malm** is a Senior Analyst with a Masters degree from Chalmers University of Technology. He joined Berg Insight in 2006 and his areas of expertise include wireless M2M, location-based services and personal navigation services.

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