

Security Applications and Wireless M2M



Security Applications and Wireless M2M is the ninth consecutive report from Berg Insight analysing the latest developments among the key applications for wireless M2M communications in the European and North American security industry.

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Highlights from this report:

- **Insights** from 30 executive interviews with market leading companies.
- **New data** on alarm systems and monitored assets by country and segment.
- **Comprehensive overview** of the small alarm system value chain and key players.
- **In-depth analysis** of market trends and key developments.
- **Detailed profiles** of key players on the European and North American security markets.
- **Market forecasts** by region, lasting until 2023.



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Which are the fastest growing IoT applications in the security industry?

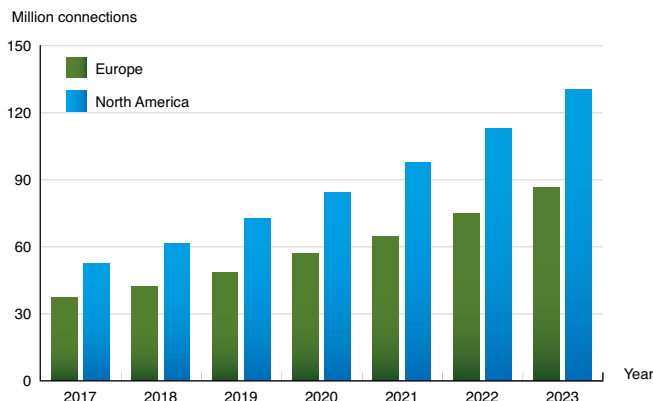
The private security sector is a global industry comprising services and solutions such as manned guarding, alarm system integration and monitoring, cash handling as well as various services like consulting and private investigations. The global market value of the security industry reached an estimated € 160 billion in 2018. The more mature European and North American markets still dominate the industry with a combined market share of close to 62 percent. The long-term annual growth rate is estimated to be between 2 and 4 percent in Europe and North America. Historically, annual growth has exceeded GDP by a few percentage points each year. However, the mature markets in Europe and North America are no longer growing faster than GDP, but rather at the same rate as GDP.

The largest application areas for IoT communications in the European and North American security industries are small alarm systems and vehicle tracking services. Small alarm systems for businesses and private homes can be 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. A more advanced type of local alarm is a self-monitoring alarm. Upon activation, this type of alarm informs the owner of the premises by sending a text message or push notification. Monitored alarms are connected to an Alarm Receiving Centre (ARC). When a monitored alarm is activated, the ARC can respond by contacting the police or by dispatching a security patrol. Monitored alarm systems are dependent on reliable communications networks. The latest generation of monitored alarm systems uses dual wired and wireless network connections in order to minimise the risk of communications failure.

The North American market for small alarm systems is much larger than the European market. At the end of 2018, there were an estimated 30.7 million active monitored alarm systems in the US and Canada. The overall penetration rate among 150 million households and businesses was 23.0 percent. In the EU28+2, there were about 15.6 million active monitored alarm systems at the end of 2018. This corresponds to an overall penetration rate of 6.4 percent among 244 million households and small businesses. Fundamental market data thus indicate a significant growth potential for small alarm systems on the European market, especially in the residential segment where the current penetration is only 5.3 percent. However, growth on ►

► this market is anticipated to vary considerably from country to country in the next few years. The advanced Nordic market is forecasted to grow the fastest, while other major markets in southern Europe and the UK will show less growth due to higher market fragmentation with fewer specialist alarm service companies that drive the market through active marketing and Brexit uncertainties. New entrants to the market in the form of various providers of home automation systems are also creating consumer awareness, especially in North America. However, many of the security features included in home automation solutions rely on self-monitoring without professional monitoring services.

Vehicle and asset tracking is the second major application area for wireless IoT communications in the security industry. Passenger cars and commercial vehicles constitute the main market segments. There are also several niche segments. Tracking solutions are being adopted to monitor commercial assets such as trailers, cargo containers, construction equipment and plant machinery. In the consumer segment, tracking services are available for monitoring assets such as motorcycles, mopeds, electric bikes, motor caravans, caravans and boats. Stolen vehicle tracking (SVT) and asset tracking systems are normally based on RF transceivers or GPS/cellular technologies. GPS/cellular technologies are also being fitted as standard equipment or aftermarket options in commercial vehicles and passenger cars as part of fleet management and telematics offerings. What distinguishes SVT services from general fleet management and car telematics is the monitoring and assistance services provided by secure monitoring centres. In Europe and North America, all the leading car OEMs have introduced embedded telematics systems. Telematics adoption in the European market is accelerated by the eCall initiative from the EU that has created an automatic emergency call system for vehicles. In North America, commercial services have driven the adoption of OEM telematics services that have evolved from being a differentiator to a mainstream feature offered by nearly all leading car brands on a majority of their models. Many car OEMs offer SVT as part of their embedded telematics service packages. Berg Insight forecasts that the number of subscribers to SVT services for passenger cars in Europe and North America will increase from 57.8 million in 2018 to 128.3 million in 2023.



Cellular IoT connections for security applications (EU28+2 and North America 2017–2023)

This report answers the following questions:

- Which are the key applications that generate most benefits for the end customers?
- Who are the leading providers of monitored small business and home alarm systems?
- Why are leading alarm system providers investing in smart home technology?
- When will wireless connectivity become a standard feature in alarm systems?
- Who are the leading providers of aftermarket vehicle tracking solutions?
- Which carmakers offer stolen vehicle tracking services as part of telematics services?
- What is the potential market size for wireless M2M communication in the security industry?

Executive Summary

1 Overview of the security industry

- 1.1 **Market overview**
 - 1.1.1 Security services
 - 1.1.2 Security systems
 - 1.1.3 Small alarm systems
 - 1.1.4 Cash handling
- 1.2 **Key industry players**
 - 1.2.1 G4S
 - 1.2.2 Securitas
 - 1.2.3 Johnson Controls
 - 1.2.4 Prosegur
 - 1.2.5 Brink's
 - 1.2.6 ADT
 - 1.2.7 United Technologies Corporation
 - 1.2.8 Stanley Black & Decker
 - 1.2.9 Allied Universal Security Services
 - 1.2.10 Loomis
 - 1.2.11 GardaWorld Security
 - 1.2.12 Verisure

2 Small business and home alarm systems

- 2.1 **Alarm systems and smart homes**
 - 2.1.1 Small alarm system technology overview
 - 2.1.2 European standards for intruder alarm systems
 - 2.1.3 Secure alarm communication services
 - 2.1.4 Alarm system value chain
 - 2.1.5 Smart homes and home automation systems
- 2.2 **Market value and alarm system penetration**
 - 2.2.1 The European market
 - 2.2.2 The North American market
- 2.3 **Company profiles**
 - 2.3.1 ADT
 - 2.3.2 AddSecure
 - 2.3.3 Alarm.com
 - 2.3.4 AT&T
 - 2.3.5 Brinks Home Security (Monitronics)
 - 2.3.6 BT Redcare
 - 2.3.7 Comcast
 - 2.3.8 CSL DualCom
 - 2.3.9 EPS Télésurveillance
 - 2.3.10 G4S
 - 2.3.11 Guardian Protection Services
 - 2.3.12 Johnson Controls
 - 2.3.13 Nest Labs
 - 2.3.14 Prosegur
 - 2.3.15 Resideo Technologies
 - 2.3.16 Ring (Amazon)
 - 2.3.17 Sector Alarm
 - 2.3.18 Securitas
 - 2.3.19 Simplisafe
 - 2.3.20 Stanley Black & Decker
 - 2.3.21 Telular (Ametek)
 - 2.3.22 United Technologies Corporation
 - 2.3.23 Uplink (Sierra Wireless)
 - 2.3.24 Verisure
 - 2.3.25 Vivint

3 Commercial vehicle and asset tracking

- 3.1 **The European and North American commercial vehicle markets**
 - 3.2 **Fleet management solutions**
 - 3.2.1 Vehicle management
 - 3.2.2 Security tracking
 - 3.2.3 Driver management
 - 3.2.4 Transport management
 - 3.2.5 Mobile workforce management and lone worker security
 - 3.3 **Trailer and cargo container tracking**
 - 3.3.1 Intermodal shipping containers
 - 3.3.2 Trailers, semi-trailers and swap bodies
 - 3.3.3 Overview of transportation industry actors
 - 3.3.4 Container and trailer tracking solutions
 - 3.3.5 Business models
 - 3.3.6 Trailer and cargo container tracking solution providers
 - 3.4 **Key fleet management and asset tracking providers**
 - 3.4.1 CLS Group (Novacom Services)
 - 3.4.2 Ctrack (Inseego)
 - 3.4.3 Emerson
 - 3.4.4 I.D. Systems
 - 3.4.5 Idem Telematics
 - 3.4.6 Masternaut
 - 3.4.7 Microlise
 - 3.4.8 Omnitrac
 - 3.4.9 ORBCOMM
 - 3.4.10 Savi Technology
 - 3.4.11 Sensitech
 - 3.4.12 SkyBitz (Ametek)
 - 3.4.13 Teletrac Navman
 - 3.4.14 TomTom Telematics
 - 3.4.15 Trimble
 - 3.4.16 Verizon Connect

4 Car and consumer asset tracking

- 4.1 **The European and North American passenger car markets**
 - 4.2 **Passenger car telematics**
 - 4.2.1 eCall and roadside assistance
 - 4.2.2 Stolen vehicle tracking
 - 4.2.3 Motor insurance telematics
 - 4.3 **Insurance industry standards for vehicle tracking**
 - 4.3.1 Belgium
 - 4.3.2 The Netherlands
 - 4.3.3 Norway
 - 4.3.4 United Kingdom
 - 4.4 **Aftermarket vehicle tracking solutions**
 - 4.4.1 Octo Telematics: European leader in motor insurance telematics
 - 4.4.2 Vodafone Automotive: Pan-European SVR provider
 - 4.4.3 LoJack distributors TRACKER, Traqueur and Detector changed ownership
 - 4.4.4 Viasat: Offers SVR through its wholly owned Security Operations Centres
 - 4.4.5 LoJack: Leading vehicle recovery provider in the US acquired by CalAmp

- 4.4.6 Guidepoint Systems: Branded and OEM cellular/GPS SVT systems
- 4.4.7 Spireon: Leading vendor of tracking systems for vehicle financing
- 4.4.8 Teletrac Navman Automotive partners with OEMs in Europe
- 4.5 **OEM car telematics services**
 - 4.5.1 Car OEM telematics services in North America
 - 4.5.2 Car OEM telematics services in Europe
 - 4.5.3 BMW ConnectedDrive
 - 4.5.4 Fiat Chrysler Automobiles UConnect
 - 4.5.5 GM OnStar
 - 4.5.6 Hyundai BlueLink
 - 4.5.7 Mercedes-Benz Mbrace and Connect Me
 - 4.5.8 PSA Group telematics services
 - 4.5.9 Toyota Connected Services and Safety Connect
 - 4.5.10 Volvo On Call
- 4.6 **Motorcycles and mopeds in Europe and North America**
 - 4.6.1 Motorcycle theft in Europe and North America
 - 4.6.2 Motorcycle tracking solutions
 - 4.6.3 Bicycles and electric bikes
 - 4.6.4 Bicycle theft in Europe and North America
 - 4.6.5 Bicycle tracking solutions
- 4.7 **The leisure vehicle and boat markets**
 - 4.7.1 Overview of the caravan and motor caravan markets
 - 4.7.2 Overview of the European and North American leisure boat markets
 - 4.7.3 Leisure vehicle and boat theft in Europe and North America
 - 4.7.4 Tracking solutions for leisure vehicles and boats

5 Market forecasts and trends

- 5.1 **Market trends and drivers**
 - 5.1.1 Alarm services have become a core feature in home automation systems
 - 5.1.2 The fleet management industry shows healthy growth in both regions
 - 5.1.3 Rapid progress in the asset tracking and cargo container tracking segment
 - 5.1.4 Telematics is becoming a standard feature on most new passenger cars
 - 5.1.5 Lack of awareness and cost remain barriers for consumer asset tracking
- 5.2 **Europe**
 - 5.2.1 Alarm systems
 - 5.2.2 Fleet management and commercial vehicle & asset tracking
 - 5.2.3 Car telematics and SVT
 - 5.2.4 Consumer asset tracking applications
- 5.3 **North America**
 - 5.3.1 Alarm systems
 - 5.3.2 Fleet management and commercial vehicle & asset tracking
 - 5.3.3 Car telematics and SVT
 - 5.3.4 Consumer asset tracking applications

Glossary



About the Authors

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