Fleet Management in Europe is the eighth consecutive report from Berg Insight analysing the latest developments on the fleet management market in this region.

This strategic research report from Berg Insight provides you with 160 pages of unique business intelligence, including 5-year industry forecasts, expert commentary and real-life case studies on which to base your business decisions.

**Highlights from the eighth edition of this report:**

- **Insights** from 40 new executive interviews with market leading companies.
- **New data** on vehicle populations and commercial fleets in Europe.
- **Comprehensive overview** of the fleet management value chain and key applications.
- **In-depth analysis** of market trends and key developments.
- **Updated profiles** 73 aftermarket fleet management solution providers.
- **Summary** of OEM propositions from truck, trailer and construction equipment brands.
- **Revised** market forecasts lasting until 2017.

**Berg Insight’s M2M Research Series**

What are the key business opportunities in the emerging wireless M2M market? Berg Insight’s M2M Research Series is a unique series of market reports published on a quarterly 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.

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Steady growth in the FM market and a second wave of market consolidation in progress

Fleet management is an ambiguous term used in reference to a wide range of solutions for different vehicle-related applications. Berg Insight’s definition of a fleet management solution is a vehicle-based system that incorporates data logging, satellite positioning and data communication to a backoffice application. The history of fleet management solutions goes back several decades. On-board vehicle computers first emerged in the 1980s and were soon connected to various satellite and terrestrial wireless networks. Today mobile networks can provide ubiquitous online connectivity at a reasonable cost and mobile computing technology delivers very high performance, as well as excellent usability. All of these components combined enable the delivery of vehicle management, transport management, driver management and mobile workforce management applications linking vehicles and enterprise IT systems.

Commercial vehicle fleets play an essential role in the European economy. According to official statistics there were 35.7 million commercial vehicles in use in EU23+2 in 2010. The 5.9 million medium and heavy trucks accounted for more than 75 percent of all inland transports, forming a € 250 billion industry. Approximately 0.8 million buses and coaches stood for 9.3 percent of all passenger kilometres. Last but not least, the greater part of the 29.1 million light commercial vehicles (LCV) in Europe was used by mobile workers and for activities such as distribution of goods and parcels.

Berg Insight is of the opinion that the European fleet management market has entered a growth period that will last for several years to come. Individual markets may however suffer temporary setbacks, depending on the local economic developments. The number of fleet management systems in active use is forecasted to grow at a compound annual growth rate of 16.0 percent from 3.05 million units at the end of 2012 to 6.40 million by 2017. The penetration rate in the total population of non-privately owned commercial vehicles is estimated to increase from 10.6 percent in 2012 to 21.1 percent in 2017.

A group of international aftermarket solution providers have emerged as the leaders on the European fleet management market. Masternaut is ranked as the largest player overall in terms of installed base with close to 287,000 units deployed in September 2013, mainly in France and the UK.

• TomTom Business Solutions was the fastest growing vendor also in 2012 and has now surpassed 300,000 subscribers. Transics is number one in the heavy trucks segment with an estimated 80,000 active units installed. Other significant players include European companies such as Vehco, Navman Wireless, TRACKER and Trafficmaster and international players like Trimble and Omnitracs (Qualcomm) from the US and the South African telematics providers DigiCore and MIX Telematics.

All major truck manufacturers on the European market offer OEM telematics solutions as a part of their product portfolio. Mercedes-Benz, Volvo and Scania launched their first products in the 1990s and followed by MAN in 2000, Renault Trucks in 2004, DAF Trucks in 2006 and Iveco in 2008. The products are all supporting the FMS standard and can generally be deployed in mixed fleets even if some functionality can be brand-specific. A major trend in the past two years has been the announcements of standard line fitment of fleet management solutions. Since the end of 2011, Scania is rolling out the Scania Communicator as standard on all European markets and includes a four year basic service subscription. The new generation of the Actros trucks from Mercedes-Benz contains the FleetBoard vehicle computer as standard in all EU27 countries since October 2011. Volvo is going in the same direction offering Dynafleet as standard in Europe. MAN TeleMatics is since July 2012 standard on the new truck model TGX EfficientLine including a 4-month trial for the service.

A second wave of M&A activities started in 2013. Danaher Corporation acquired Navman Wireless and Trafficmaster from Prairie Capital and Vector Capital respectively. TomTom made its second acquisition in the fleet management space when picking up Coordina headquartered in Spain. The acquisition adds 27,000 fleet management subscriptions primarily in Spain. Qualcomm also announced the divestment of the Omnitracs operations in the US, Canada and South America to Vista Equity Partners in August 2013. The European arm of the business is surprisingly still part of Qualcomm. Lyceum Capital acquired Isotrak from South African telematics providers DigiCore and MiX Telematics.

This report answers the following questions:

- Is the European fleet management market back on a growth track?
- Will the FM industry consolidate further during 2013 and 2014?
- What is the geographical and ownership structure of commercial vehicle fleets in Europe?
- Who are the leading international and regional providers of aftermarket fleet management solutions in Europe?
- What offerings are available from truck, trailer and construction equipment OEMs?
- How will the regulatory developments in the Americas affect the fleet management industry?
- What impact will the launch of standard factory installed FM systems from the OEMs have on the market?
- How will the commercial vehicle telematics industry evolve in the future?
Executive summary

1 Commercial vehicle fleets in Europe
1.1 Light commercial vehicles
1.2 Medium and heavy trucks
1.3 Buses and coaches
1.4 Trailers and semi-trailers
1.5 Off-road construction and agriculture equipment
1.6 Ownership structure
1.6.1 Statistical estimates by industry and company size
1.6.2 Light commercial vehicle fleets
1.6.3 Medium and heavy commercial vehicle fleets

2 Fleet management solutions
2.1 Fleet management infrastructure
2.1.1 Vehicle segment
2.1.2 GNSS segment
2.1.3 Network segment
2.1.4 Backoffice segment
2.2 Vehicle management
2.2.1 Vehicle diagnostics and maintenance planning
2.2.2 Security tracking
2.3 Driver management
2.3.1 Driving data registration and analysis
2.3.2 Eco-driving schemes
2.3.3 Insurance risk management
2.4 Operations management
2.4.1 Routing and navigation
2.4.2 Transport management
2.4.3 Mobile workforce management
2.5 Regulatory compliance and reporting
2.5.1 Digital tachograph data download
2.5.2 Electronic toll collection
2.5.3 Other applications
2.6 Business models

3 Market forecasts and trends
3.1 Market analysis
3.1.1 Installed base and unit shipments
3.1.2 Regional markets
3.1.3 Vendor market shares
3.2 Market drivers and barriers
3.2.1 Macroeconomic environment
3.2.2 Regulatory environment
3.2.3 Competitive environment
3.2.4 Technology environment
3.3 Value chain analysis
3.3.1 Telematics industry players
3.3.2 Automotive industry players
3.3.3 Telecom industry players
3.3.4 IT industry players
3.4 Future industry trends

4 OEM products and strategies
4.1 Truck manufacturers
4.1.1 Daimler Group
4.1.2 Volvo Group
4.1.3 Scania
4.1.4 MAN Truck & Bus
4.1.5 DAF Trucks
4.1.6 Iveco
4.2 Construction equipment manufacturers
4.2.1 Bobcat
4.2.2 Caterpillar
4.2.3 Deere & Company
4.2.4 Hyundai Construction Equipment
4.2.5 JCB
4.2.6 Komatsu
4.2.7 Volvo CE
4.3 Trailer manufacturers
4.3.1 Schmitz Cargobull
4.3.2 Krone
4.3.3 Kögel
4.4 OE suppliers
4.4.1 Actia
4.4.2 Continental
4.4.3 Haldex
4.4.4 Stoneridge Electronics
4.4.5 WABCO
4.5 Hardware and software providers
4.5.1 Advantech-DLoG
4.5.2 Aplicom
4.5.3 Calamp
4.5.4 ERM Advanced Telematics
4.5.5 Falcon
4.5.6 Lysanda
4.5.7 Mobile Devices
4.5.8 Phoenix International
4.5.9 Pointer Telocation
4.5.10 Quake Global
4.5.11 Squarell
4.6 Orange Business Services
4.6.1 RAM Mobile Data
4.6.2 Seimap
4.6.3 Traqueur
4.6.4 Germany and Central Europe
4.6.5 AROBS Transilvania Software
4.6.6 AutoGuard
4.6.7 CVS Mobile
4.6.8 ETA Automatizari Industriale
4.6.9 Euro Telematic
4.6.10 Finder
4.6.11 Framelogic
4.6.12 GPS Bulgaria
4.6.13 I-Cell
4.6.14 IAV
4.6.15 ICOM
4.6.16 Idem
4.6.17 Mireo
4.6.18 Mobile Objects
4.6.19 Openmatics
4.6.20 Inosat
4.6.21 Locus
4.6.22 MobVision
4.6.23 Tecmic
4.6.24 EcoFleet
4.6.25 Fleet 101
4.6.26 Fleettech
4.6.27 GateHouse
4.6.28 Locus
4.6.29 PocketMobile
4.6.30 Trackunit
4.6.31 Aeromark
4.6.32 Blue Tree Systems
4.6.33 Calltrak
4.6.34 FleetMatics
4.6.35 GreenRoad
4.6.36 Isotrack
4.6.37 Matrix Telematics
4.6.38 Microlise
4.6.39 Quartix
4.6.40 TRACKER Network
4.6.41 Trakm8
4.6.42 Transpoco
4.6.43 Webtech Wireless

Glossary
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