

Index

Table of Contents

Table of Contents i

List of Figuresvii

Executive summary 1

1 The global passenger car market..... 1

 1.1 Introduction..... 1

 1.1.1 Passenger cars in use by region..... 1

 1.1.2 New passenger car registration trends 4

 1.1.3 Hybrid electric, plug-in hybrid electric and all-electric vehicles 11

 1.2 Overview of aftermarket car telematics services 14

 1.2.1 Aftermarket car telematics services in Europe..... 16

 1.2.2 Aftermarket car telematics services in the Americas 18

 1.2.3 Aftermarket car telematics services in ROW 20

 1.3 Regulatory compliance..... 22

 1.3.1 Vehicle security, safety and emergency call regulations 22

 1.3.2 The eCall and ERA-GLONASS initiatives 22

 1.3.3 Insurance industry standards for vehicle tracking 24

 1.4 Vehicle crime 25

2 Car telematics solutions 27

 2.1 Aftermarket telematics infrastructure..... 27

 2.1.1 Vehicle segment..... 28

 2.1.2 Tracking segment..... 30

 2.1.3 Network segment 30

 2.1.4 Service segment..... 34

 2.2 Aftermarket car telematics applications 34

 2.2.1 eCall and roadside assistance 35

 2.2.2 Stolen vehicle tracking 36

 2.2.3 Motor insurance telematics 37

 2.2.4 Dealer lot management..... 38

2.2.5	Vehicle finance telematics.....	39
2.2.6	Remote control and convenience services.....	39
2.2.7	Vehicle diagnostics and maintenance.....	40
2.2.8	Electronic toll collection and congestion charging.....	40
2.2.9	Wi-Fi hotspot.....	41
2.2.10	Vehicle emission monitoring.....	42
2.3	Business models.....	42
3	Market forecasts and trends.....	45
3.1	Aftermarket car telematics market sizing.....	45
3.1.1	Aftermarket car telematics in Europe.....	46
3.1.2	Aftermarket car telematics in the Americas.....	48
3.1.3	Aftermarket car telematics in ROW.....	50
3.1.4	Vendor market shares.....	53
3.2	Value chain analysis.....	58
3.2.1	Automotive industry players.....	58
3.2.2	Telematics industry players.....	62
3.2.3	Telecom industry players.....	66
3.2.4	IT industry players.....	72
3.3	Market drivers and barriers.....	73
3.3.1	Macroeconomic environment.....	74
3.3.2	Regulatory environment.....	74
3.3.3	Competitive environment.....	75
3.3.4	Technology environment.....	76
3.4	Market trends and conclusions.....	78
3.4.1	Continued broadening of the aftermarket car telematics concept is expected..	78
3.4.2	Privacy concerns are softening.....	79
3.4.3	Aftermarket SVT/SVR services compete with OEM services in many countries	79
3.4.4	Usage-based insurance to remain an aftermarket service in most countries	80
3.4.5	Insurance companies insource telematics activities in many markets.....	80
3.4.6	Smartphone-based telematics solutions compete with aftermarket telematics .	81
3.4.7	CRM solutions and vehicle diagnostics enable improved customer care.....	82
3.4.8	Wi-Fi hotspots enable convenient connectivity for passengers.....	82

- 3.4.9 Car telematics service providers to use a wide ecosystem of partners..... 82
- 3.4.10 Consumer telematics can potentially increase MNO IoT revenues..... 83
- 3.4.11 New IoT Technologies to simplify aftermarket car telematics services 83
- 4 International car telematics solution providers..... 85
 - 4.1 Bright Box 85
 - 4.2 CalAmp (LoJack) 87
 - 4.3 Continental..... 91
 - 4.4 Harman Connected Services 93
 - 4.5 IMS (Trak Global Group) 95
 - 4.6 Ituran..... 98
 - 4.7 Mojio 102
 - 4.8 Octo Telematics..... 105
 - 4.9 Pointer Telocation (PowerFleet) 108
 - 4.10 Targa Telematics 110
 - 4.11 Teletrac Navman Automotive 111
 - 4.12 Verizon..... 114
 - 4.13 Viasat Group..... 116
 - 4.14 Vodafone and Vodafone Automotive 118
- 5 Company profiles and strategies..... 123
 - 5.1 Providers of SVT/SVR and related services..... 123
 - 5.1.1 Autoconnex 124
 - 5.1.2 Autolocator 125
 - 5.1.3 Cesar Satellite 126
 - 5.1.4 StarLine 127
 - 5.1.5 Coyote (Traqueur) 128
 - 5.1.6 Ingenie Business 129
 - 5.1.7 MS&AD TX Connected..... 130
 - 5.1.8 SHERLOG Technology 131
 - 5.1.9 BrickHouse Security..... 132
 - 5.1.10 Certified Tracking Solutions 133
 - 5.1.11 Cox Automotive and Cox2M 134
 - 5.1.12 Guidepoint Systems..... 135

5.1.13	Ikon Technologies	136
5.1.14	IMETRIK Global	137
5.1.15	MasTrack	137
5.1.16	PassTime GPS	138
5.1.17	Procon Analytics.....	139
5.1.18	SareKon.....	141
5.1.19	Skypatrol	142
5.1.20	Spireon	143
5.1.21	Autotrac	145
5.1.22	Car Security (LoJack Argentina)	146
5.1.23	CEABS.....	147
5.1.24	Maxtrack	147
5.1.25	OMNILINK (Graber).....	148
5.1.26	Pósitron (Stoneridge)	149
5.1.27	Active Telematics	150
5.1.28	Katsana.....	151
5.1.29	TPL Trakker	152
5.1.30	ACM Track.....	153
5.1.31	Bidtrack (Bidvest Group).....	153
5.1.32	Cartrack	154
5.1.33	Digit Vehicle Tracking (Digicell)	157
5.1.34	MiX Telematics	158
5.1.35	Netstar	161
5.1.36	Tracker Connect.....	163
5.2	Specialist consumer telematics solution providers.....	165
5.2.1	Air	165
5.2.2	Grupo Next.....	165
5.2.3	Net4things	166
5.2.4	Protectus Technologies (CarLock)	167
5.2.5	Springworks International	168
5.2.6	The Plan B Company	170
5.2.7	Thinxnet (ryd)	171

5.2.8 AccuTracking 172

5.2.9 Autobrain 172

5.2.10 Automatic Labs (SiriusXM) 173

5.2.11 Autonet Mobile 173

5.2.12 Agnik (Vyncs) 175

5.2.13 Linxup (MOTOSafety) 175

5.2.14 Modus..... 176

5.2.15 Tail Light (Bouncie) 177

5.2.16 Zubie 178

5.2.17 Comodif..... 180

5.2.18 Beijing Yesway Information Technology..... 181

5.2.19 CarlQ 182

5.2.20 Minda iConnect (Carot India) 183

5.2.21 Scope Technology 184

5.2.22 PATEO 186

5.2.23 SenSight Technologies (AutoWiz) 187

5.2.24 Jooycar..... 188

5.3 Technology vendors..... 188

5.3.1 Bosch Connected Devices and Solutions..... 189

5.3.2 Danlaw..... 189

5.3.3 Gosuncn WeLink 191

5.3.4 Jimi (Concox) 192

5.3.5 Meitrack..... 193

5.3.6 Meta System..... 193

5.3.7 Munic..... 195

5.3.8 PFK Electronics 196

5.3.9 Quartix 197

5.3.10 Queclink Wireless Solutions..... 198

5.3.11 Redtail Telematics 198

5.3.12 Sinocastel..... 200

5.3.13 Teltonika 201

5.3.14 Trakm8 202

5.3.15 Traffilog..... 202

5.3.16 ThinkRace..... 203

5.3.17 Voyomotive..... 205

5.3.18 Xirgo Technologies 206

Glossary 209

Index

List of Figures

Figure 1.1: Car parc by region (World 2012–2018)	2
Figure 1.2: Passenger car density per 1,000 inhabitants (EU27+UK 2018)	3
Figure 1.3: New car registration data (World 2012–2019)	4
Figure 1.4: Top 10 countries by new passenger car and light truck registrations (2019)	5
Figure 1.5: Passenger car registrations by manufacturer (EU+EFTA 2019)	7
Figure 1.6: Passenger car registrations by manufacturer (North America 2019)	8
Figure 1.7: Passenger car registrations by manufacturer (China 2019)	10
Figure 1.8: Registered highway capable BEVs and PHEVs (World 2019)	13
Figure 1.9: New registrations of highway capable BEVs and PHEVs (World 2019)	14
Figure 2.1: eCall application lifecycle	35
Figure 2.2: SVT application lifecycle	36
Figure 2.3: Motor insurance telematics application lifecycle	37
Figure 2.4: Electronic toll collection application lifecycle	41
Figure 3.1: Device shipments and active systems in use (World 2019–2024)	46
Figure 3.2: Device shipments and active systems in use (EU+EFTA 2019–2024)	47
Figure 3.3: Device shipments and active systems in use (E. Europe 2019–2024)	48
Figure 3.4: Device shipments and active systems in use (North America 2019–2024)	49
Figure 3.5: Device shipments and active systems in use (Latin America 2019–2024)	50
Figure 3.6: Device shipments and active systems in use (APAC 2019–2024)	51
Figure 3.7: Device shipments and active systems in use (MEA 2019–2024)	52
Figure 3.8: Major aftermarket car telematics vendors (World Q4-2019)	54
Figure 3.9: Major specialised SVT/SVR telematics vendors (World Q4-2019)	56
Figure 3.10: Major specialised consumer telematics players (World Q4-2019)	57
Figure 3.11: Examples of hardware vendors serving the car telematics market	65
Figure 3.12: The T-Mobile Sync-UP DRIVE app	67
Figure 3.13: MNO consumer car telematics offerings (Q4-2020)	68
Figure 3.14: M2M communications and managed service providers (Q4-2019)	71
Figure 4.1: The Remoto web portal	86

Figure 4.2: The HARMAN Spark app 94

Figure 4.3: Mojio app templates 104

Figure 4.4: GLOBALWATCH coverage by Teletrac Navman Automotive 113

Figure 4.5: Verizon Hum products..... 115

Figure 4.6: The V-Auto OBD-II dongle 121

Figure 5.1: The StarLine M18 telematics device..... 127

Figure 5.2: The Kahu app 144

Figure 5.3: Cartrack consumer subscription packages (South Africa 2020) 156

Figure 5.4: Overview of Cartrack’s subscriber base by application and region (FY-2020).... 157

Figure 5.5: Matrix subscription packages (South Africa 2020)..... 160

Figure 5.6: Tracker Connect subscription packages (South Africa 2020) 164

Figure 5.7: The CarLock web app 168

Figure 5.8: Autonet Mobile hardware 174

Figure 5.9: DataLogger OBD-II Devices (Q3-2020) 190

Figure 5.10: Sinocastel OBD devices 201

Figure 5.11: AmberOBD mobile and web apps..... 204

Figure 5.12: Xirgo’s XT 2400 Series..... 207