

Index

Table of Contents

Table of Contents.....	i
List of Figures.....	vi
Executive summary.....	1
1 Overview of the security industry.....	3
1.1 Market overview.....	4
1.1.1 Security services	5
1.1.2 Security systems	6
1.1.3 Small alarm systems	6
1.1.4 Cash handling	8
1.2 Key industry players	8
1.2.1 G4S.....	11
1.2.2 Securitas.....	11
1.2.3 Tyco (Johnson Controls).....	12
1.2.4 Prosegur.....	12
1.2.5 Brink's.....	13
1.2.6 ADT.....	13
1.2.7 United Technologies Corporation.....	13
1.2.8 Stanley Black & Decker.....	14
1.2.9 Allied Universal Security Services.....	14
1.2.10 Loomis.....	15
1.2.11 GardaWorld Security	15
1.2.12 Verisure	16
2 Small business and home alarm systems.....	17
2.1 Alarm systems and smart homes.....	18
2.1.1 Small alarm system technology overview.....	19
2.1.2 European standards for intruder alarm systems.....	21
2.1.3 Secure alarm communication services	24
2.1.4 Alarm system value chain	26

2.1.5	Smart homes and home automation systems	28
2.2	Market value and alarm system penetration	32
2.2.1	The European market.....	32
2.2.2	The North American market	38
2.3	Company profiles	40
2.3.1	ADT.....	43
2.3.2	AddSecure.....	46
2.3.3	Alarm.com	47
2.3.4	AT&T	49
2.3.5	BT Redcare.....	51
2.3.6	Comcast (Xfinity)	52
2.3.7	CSL DualCom.....	52
2.3.8	EPS Télésurveillance.....	54
2.3.9	G4S.....	55
2.3.10	Guardian Protection Services	56
2.3.11	MONI Smart Security.....	56
2.3.12	Numerex (Uplink)	57
2.3.13	Prosegur.....	58
2.3.14	Protection 1	59
2.3.15	Sector Alarm.....	60
2.3.16	Securitas.....	61
2.3.17	Slomin's.....	63
2.3.18	Stanley Security Solutions	63
2.3.19	Telular (Telguard)	64
2.3.20	Tyco (Johnson Controls).....	65
2.3.21	UTC Climate, Controls & Security	66
2.3.22	Verisure	67
2.3.23	Vivint	69
3	Commercial vehicle and asset tracking.....	73
3.1	The European and North American commercial vehicle markets	73
3.2	Fleet management solutions	78
3.2.1	Vehicle management.....	79

3.2.2	Security tracking.....	79
3.2.3	Driver management.....	80
3.2.4	Transport management.....	80
3.2.5	Mobile workforce management and lone worker security.....	81
3.3	Trailer and cargo container tracking	82
3.3.1	Intermodal shipping containers	82
3.3.2	Trailers, semi-trailers and swap bodies.....	83
3.3.3	Overview of transportation industry actors	83
3.3.4	Container and trailer tracking solutions	84
3.3.5	Business models	88
3.3.6	Trailer and cargo container tracking solution providers	89
3.4	Key fleet management and asset tracking providers.....	93
3.4.1	Teletrac Navman	99
3.4.2	Ctrack (Novatel Wireless)	101
3.4.3	Fleetmatics	103
3.4.4	FreightWatch International	104
3.4.5	I.D. Systems	105
3.4.6	Idem Telematics	107
3.4.7	Locus Traxx (Emerson)	108
3.4.8	Masternaut.....	108
3.4.9	Microlise	110
3.4.10	Novacom	110
3.4.11	Omnitracs	112
3.4.12	Orbcomm	114
3.4.13	Savi Technology.....	118
3.4.14	SkyBitz.....	120
3.4.15	Telogis	122
3.4.16	TomTom Telematics.....	125
3.4.17	Trimble.....	128
4	Car and consumer asset tracking.....	133
4.1	The European and North American passenger car markets	133
4.2	Passenger car telematics	139

4.2.1	eCall and roadside assistance	140
4.2.2	Stolen vehicle tracking	141
4.2.3	Motor insurance telematics	142
4.3	Insurance industry standards for vehicle tracking	144
4.3.1	Belgium	144
4.3.2	The Netherlands	145
4.3.3	Norway	146
4.3.4	United Kingdom	147
4.4	Aftermarket vehicle tracking solutions	149
4.4.1	Octo Telematics: European leader in motor insurance telematics.....	150
4.4.2	Vodafone Automotive: Pan-European SVR provider	153
4.4.3	LoJack distributors in Europe: TRACKER, Traqueur and Detector	154
4.4.4	Viasat: Offers SVR through its wholly owned Security Operations Centres	156
4.4.5	LoJack: Leading vehicle recovery provider in the US acquired by CalAmp ...	157
4.4.6	Guidepoint Systems: Branded and OEM cellular/GPS SVT systems.....	158
4.4.7	Spireon: Leading vendor of tracking systems for vehicle financing	158
4.5	OEM car telematics services	159
4.5.1	Car OEM telematics services in North America	163
4.5.2	Car OEM telematics services in Europe.....	164
4.5.3	BMW ConnectedDrive	165
4.5.4	Fiat Chrysler Automobiles UConnect.....	167
4.5.5	GM OnStar.....	168
4.5.6	Mercedes-Benz Mbrace and Connect Me	170
4.5.7	PSA Group telematics services	172
4.5.8	Volvo On Call.....	173
4.6	Motorcycles and mopeds in Europe and North America.....	175
4.6.1	Motorcycle theft in Europe and North America.....	177
4.6.2	Motorcycle tracking solutions	178
4.7	The leisure vehicle and boat markets.....	179
4.7.1	Overview of the caravan and motor caravan markets	180
4.7.2	Overview of the European and North American leisure boat markets.....	181
4.7.3	Leisure vehicle and boat theft in Europe and North America	184

4.7.4	Tracking solutions for leisure vehicles and boats	185
5	Market forecasts and trends	189
5.1	Market trends and drivers.....	190
5.1.1	Alarm services have become a core feature in home automation systems	190
5.1.2	The fleet management industry shows healthy growth in both regions	192
5.1.3	Rapid progress in the asset tracking and cargo container tracking segment..	193
5.1.4	Telematics is becoming a standard feature on most new passenger cars	195
5.1.5	Lack of awareness and cost remain barriers for consumer asset tracking	196
5.2	Europe	196
5.2.1	Alarm systems	196
5.2.2	Fleet management and commercial vehicle & asset tracking	198
5.2.3	Car telematics and SVT.....	199
5.2.4	Consumer asset tracking applications.....	201
5.3	North America.....	202
5.3.1	Alarm systems	202
5.3.2	Fleet management and commercial vehicle & asset tracking	203
5.3.3	Car telematics and SVT.....	205
5.3.4	Consumer asset tracking applications.....	206
Glossary		209

Index

List of Figures

Figure 1.1: Security market value (World 2013–2016).....	3
Figure 1.2: Market value by segment (EU28+2 and North America 2016).....	5
Figure 1.3: Market value by country (EU28+2 and North America 2016).....	7
Figure 1.4: Leading security industry players by segment (EU and North America 2016)	9
Figure 1.5: Leading integrated security groups by revenues (2016)	10
Figure 2.1: Alarm system brands, by manufacturer (2017)	18
Figure 2.2: Small alarm system components	19
Figure 2.3: EN 50131 grading system	21
Figure 2.4: EN 50131 ATS rating criteria	22
Figure 2.5: EN 50131 grading system criteria	23
Figure 2.6: Small alarm system service ecosystem.....	26
Figure 2.7: Alarm receiving centres by country (EU27+2 2011).....	27
Figure 2.8: Penetration of whole-home automation systems (EU28+2 and NA 2015).....	29
Figure 2.9: Top whole-home system vendors (EU28+2 2015)	30
Figure 2.10: Top whole-home system vendors (NA 2015)	32
Figure 2.11: Monitored small alarm systems by country (EU28+2 2016)	33
Figure 2.12: GDP per capita and total alarm system penetration (Europe 2016)	34
Figure 2.13: Homeownership and residential alarm system penetration (Europe 2016).....	35
Figure 2.14: Households, dwelling types and homeownership by country (EU28+2 2014)...	36
Figure 2.15: Existing homes and housing starts (EU28+2 2011–2014)	37
Figure 2.16: Monitored small alarm systems by segment (North America 2016)	38
Figure 2.17: Small alarm systems revenues (North America 2016)	39
Figure 2.18: Existing homes and housing starts (North America 2013–2016)	39
Figure 2.19: Top 20 monitored alarm providers (EU28+2 and North America 2016)	42
Figure 2.20: AT&T Digital Life packages.....	50
Figure 3.1: Commercial vehicle registration data (EU23+2 2015).....	74
Figure 3.2: Registrations of GVW 3–8 vehicles (US 2014).....	75
Figure 3.3: Registrations of GVW 3–8 vehicles (Canada 2014).....	76

Figure 3.4: Fleet management infrastructure overview	78
Figure 3.5: The transport chain.....	84
Figure 3.6: Examples of container tracking device form factors	86
Figure 3.7: Trailer and cargo container tracking providers (EU28+2 and NA 2017)	90
Figure 3.8: Top-25 fleet management providers, by installed base (EU27+2 Q4-2015)	94
Figure 3.9: Top-15 fleet management providers, by installed base (Americas Q4-2015).....	96
Figure 3.10: Major cargo loading unit tracking vendors (Q4-2015)	98
Figure 4.1: Passenger car registration data (EU28+2 2016)	134
Figure 4.2: Passenger car manufacturer market shares (EU28+2 2016)	135
Figure 4.3: Passenger car registration data (North America 2016)	136
Figure 4.4: Passenger car manufacturer market shares (North America 2016).....	137
Figure 4.5: eCall application lifecycle	140
Figure 4.6: SVT application lifecycle.....	141
Figure 4.7: Motor insurance telematics application lifecycle.....	142
Figure 4.8: Top five aftermarket vehicle tracking solution vendors (Europe 2016).....	149
Figure 4.9: Connected car services by car brand (Europe 2016)	160
Figure 4.10: Connected car services by car brand (North America 2016).....	161
Figure 4.11: Telematics subscribers by carmaker (World 2014–2015)	162
Figure 4.12: Moped and motorcycle market data (EU28+2 2016)	176
Figure 4.13: Moped and motorcycle market data (North America 2014–2015)	177
Figure 4.14: Motorcycle tracking pricing examples (Europe and North America 2017)	179
Figure 4.15: Motor caravan and touring caravan registration data (EU28+2 2015/2016)	181
Figure 4.16: Leisure boat market data (EU28+2 and North America 2015)	182
Figure 4.17: Leisure vehicle and boat tracking pricing examples (Europe 2017).....	186
Figure 5.1: SIMs used for security M2M applications by segment (EU+NA 2015–2021).....	189
Figure 5.2: Alarm system shipments and cellular penetration (EU28+2 2015–2021)	197
Figure 5.3: Fleet management shipments and penetration rate (EU28+2 2015–2021)	199
Figure 5.4: Car telematics shipments and SVT subscribers (EU28+2 2015–2021).....	200
Figure 5.5: Asset tracking for consumer applications (EU28+2 2015–2021)	201
Figure 5.6: Alarm system shipments and cellular penetration (North America 2015–2021)..	202
Figure 5.7: Fleet management shipments (North America 2015–2021).....	204
Figure 5.8: Car telematics shipments and SVT subscribers (North America 2015–2021)	206

Figure 5.9: Asset tracking for consumer applications (North America 2015–2021) 207