



# M2M

## The Machine-to-Machine Market, 2010-2014

3<sup>rd</sup> edition

### Market & Data Reports

This report provides an analysis of the M2M market that is currently changing shape, assessing the key technologies to accelerate such a development of this promising market, along with an examination of the positioning of the top players, the key issues to be addressed and market forecasts up to 2014 by geographical area and by type of market.

#### Key questions

- What are the main impacts of the economical downturn on the M2M industry?
- What is the size of M2M markets in Europe, North America and Asia and will it evolve?
- What are the key drivers for the M2M market to take-off?
- What are the main vertical markets of M2M, currently and in the coming years?
- Who are the leading players - Module vendors, Mobile network operators, MVNE, Satellite operators, Integrators - on this market and how are they positioning themselves?
- What are the quantified opportunities for telcos on cellular and satellite networks?

#### > Database (Excel):

- Asia-Pacific, Europe, North America
- Cellular M2M, Satellite-based M2M
- Hardware, Communication, Software & IT





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### Database (Excel)

by geographical area and by type of market

100 pages

Print: 2900 Eur

PDF + Excel: 3500 Eur

July 2010

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### Database (Excel)

Zones covered	Data analysed: 2007-2014
<ul style="list-style-type: none"> <li>World</li> <li>Europe</li> <li>North America</li> <li>Asia-Pacific</li> </ul>	<ul style="list-style-type: none"> <li>Cellular M2M Modules/SIMs (in million units)</li> <li>Satellite-based M2M modules (in million units)</li> <li>Total M2M market (cellular &amp; satellite) (at year end, million EUR)</li> <li>M2M communication &amp; associated services revenues (at year end, million EUR)</li> <li>M2M hardware &amp; associated services revenues (at year end, million EUR)</li> <li>M2M module revenues (at year end, million EUR)</li> <li>M2M software &amp; IT services revenues (at year end, million EUR)</li> <li>Cellular M2M market (at year end, million EUR) (at year end, million EUR)</li> <li>Satellite-based M2M markets (at year end, million EUR)</li> <li>Cellular M2M connectivity market (at year end, million EUR)</li> <li>Satellite M2M connectivity market (at year end, million EUR)</li> <li>Cellular M2M module market (at year end, million EUR)</li> <li>Total mobile Revenues and subscribers</li> </ul>

### Players included in the report

Modules vendors	Mobile network operators	MVNO	Satellite operators	Integrators & Software players
<ul style="list-style-type: none"> <li>Cinterion Wireless*</li> <li>Coronis</li> <li>Erco Gener</li> <li>Enfora*</li> <li>Satamatics</li> <li>Sierra Wireless*</li> <li>SIMCom*</li> <li>Strao Global</li> <li>Skybility</li> <li>SkyBitz</li> <li>SkyWave</li> <li>Telit*</li> </ul>	<ul style="list-style-type: none"> <li>AT&amp;T*</li> <li>Bouygues Telecom*</li> <li>BT*</li> <li>KDDI*</li> <li>NTT DoCoMo*</li> <li>Orange Business Service*</li> <li>SFR*</li> <li>Swisscom*</li> <li>Telefónica / O2*</li> <li>Telecom Italia*</li> <li>Telenor Connexion*</li> <li>T-Mobile</li> <li>T-Mobile USA*</li> <li>Verizon*</li> <li>Vodafone*</li> </ul>	<ul style="list-style-type: none"> <li>Aeris</li> <li>KORE Telematics*</li> <li>Kuantic</li> <li>Maingate</li> <li>Wyless*</li> </ul>	<ul style="list-style-type: none"> <li>Eutelsat</li> <li>Globalstar*</li> <li>Inmarsat*</li> <li>Iridium*</li> <li>Orbcomm*</li> </ul>	<ul style="list-style-type: none"> <li>Accenture</li> <li>Anywhere (Wavecom)</li> <li>Atos Origin</li> <li>Axeda</li> <li>AWS</li> <li>Cap Gemini</li> <li>Comtech M2M</li> <li>EmWare</li> <li>IBM</li> <li>Jasper Wireless*</li> <li>Mobile Wisdom</li> <li>Numerex*</li> <li>nPhase (Qualcomm)*</li> <li>Questra (now Axeda)</li> <li>SensorLogic*</li> <li>Tridium</li> </ul>

\* Detailed player profiles

### Methodology - Market assessment and forecasts

#### IDATE's forecasts are based on:

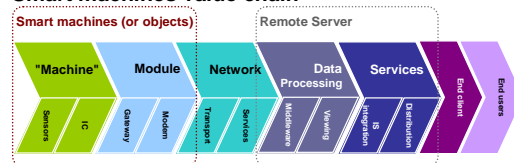
- Primary data gathering worldwide, through desk research and direct interviews with the major module manufacturers and mobile and satellite operators.
- Market models which isolate key service consumption parameters and service pricing assumption.

#### Data for estimations and forecasts

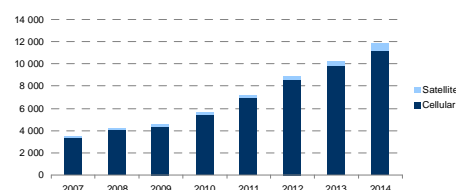
(from 2007 to 2014) is segmented by:

- type of network: cellular and satellite
- geographical area
- building block of M2M:
  - hardware
  - software
  - connectivity

#### Smart machines value chain



#### M2M Total Revenues: Europe (million EUR)



Source : IDATE