

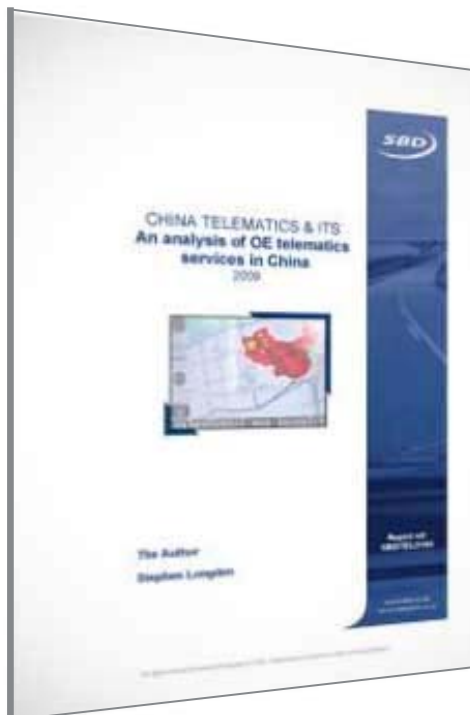
Definitive source on current and emerging telematics in China



Finding a route to market for OE telematics services in China...

As OE telematics start to emerge in China, SBD provides an overview of the current and planned service launches along with market forecasts and the key issues vehicle manufacturers and service providers are facing with licensing, partnerships and public sector constraints.

“An analysis of OE telematics service in China” describes the activities of the vehicle manufacturers and service providers leading the way on telematics so that you can identify the successful strategies required for entering this growing market.



This report will help you to:

- Realise the importance of selecting and cooperating with the right Chinese telematics service provider
- Understand who are the key players in the telematics service provider market, both foreign and domestic
- Understand the challenges and potential barriers to launching telematics in China and the solutions adopted to date
- Learn what services leading vehicle manufacturers will offer including the availability, coverage and partnership agreements

For additional information please email jappleby@sbd.co.uk or telephone Juanita on +44 (0) 1908 305101 and she will be happy to deal with your enquiry.



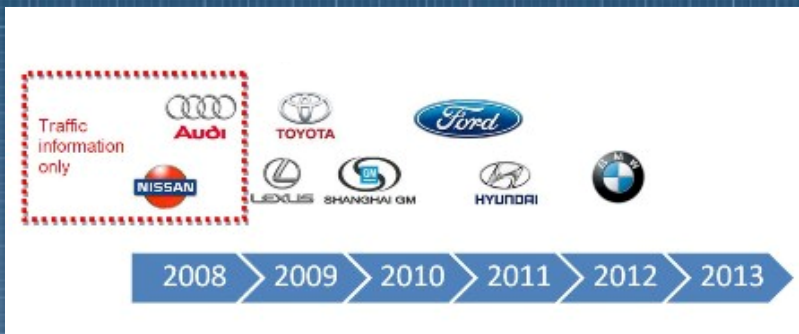
»» An analysis of OE telematics services in China...

The market for OE telematics services in China is set for an exciting period of expansion. Toyota's launch of its G-Book service in China has sparked many rival manufacturers into action, with GM, Ford and BMW leading the charge to catch up over the coming years.

These manufacturers are planning to replicate their existing services from Europe and the US but an analysis of Toyota's experience in China suggests that this may be difficult, if not impossible, without the strong support of local partners, including:

- Telematics service providers
- Call centre operators
- Mobile Network Operators (MNOs)
- Traffic information providers

Expected launch dates of OE telematics services in China



Data sheets for the OE telematics services under development by vehicle manufacturers in China

| Nissan Starwings | | | | |
|-------------------------------------|----------------|-------------------|-------------|-----------------------|
| Partners | | | | |
| Telematics service provider | N/A | | | |
| Call centre | N/A | | | |
| Communications carrier | TBC | | | |
| Communications technology | FM RTIC | | | |
| In-car telematics hardware supplier | Denso | | | |
| Digital map supplier | NavInfo | | | |
| Traffic information supplier | BTIC / CenNavi | | | |
| Telematics Services | | | | |
| Services | Offered | Coverage | | |
| Traffic Information | ✓ | Beijing | | |
| Availability | | | | |
| Model offered with telematics | Date offered | Price of hardware | Free period | Price of subscription |
| Teana 3.5L | 2008 | Standard | Lifetime | Free |

SBD's report, "*An analysis of OE telematics services in China*", compares the OE telematics services under development by vehicle manufacturers, focussing on:

- eCall emergency assistance
- bCall breakdown assistance
- Stolen vehicle tracking
- Off-board route optimisation
- Traffic information
- Operator / concierge assistance
- Remote diagnostics

The report looks in detail at Toyota's implementation of these services in China and identifies the foreign and local partner network that was critical to it overcoming the complex government licensing procedures needed to operate a telematics call centre and to interface with China's PSAPs.

China looks set to become one of the most competitive markets for telematics, but the associated bureaucracy and restrictions will also make it one of the most challenging, especially for foreign organisations.

SBD's latest report therefore provides essential reading as a guide to vehicle manufacturers and service providers with an interest in deploying telematics services in the world's largest new car market.

»» ...know what tomorrow brings

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- Helping you grow your business by giving you the reassurance of knowing which technologies you should develop
- Helping you reduce your costs by saving you both planning and implementation time

About report author...



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Stephen achieved an MSc in Transport Planning and Management at the University of Westminster, before becoming the editor of *The Intelligent Highway* magazine. At SBD, Stephen specialises in research and analysis into automotive telematics and navigation. He has investigated a variety of ITS applications and is widely regarded as an expert on emerging markets such as China and emerging initiatives such as eCall.

Feedback Form - "An analysis of OE telematics services in China" (Ref: 2190)

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Related Reports



China Toyota G-Book End User Survey

SBD is planning a multi-client consumer survey of users of Toyota's G-Book service in China. The study, scheduled for late-2009, will involve phone interviews of G-Book users and in-depth personal interviews with drivers and dealers. Test drives of G-Book vehicles are also planned to test the response of Chinese consumers to being introduced to the concept of telematics.

Those companies that sign up for the project will have input into the questions that will be used in the survey. Register your interest and learn how you can participate by contacting jappleby@sbd.co.uk.



The key market drivers for telematics in China

This report provides an analysis of the drivers for in-car telematics services in China. It identifies the important factors that are encouraging manufacturers to offer OE telematics services, including:

- Car ownership
- Road safety & emergency services
- Vehicle theft
- Cellular network coverage
- Local aftermarket solutions
- Government policy