Industry briefing

Telematics in Asia: Development and impact

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Graphic courtesy of Teradyne Inc. www.teradyne.com
This report provides an overview of the development of Telematics in Asia, and its impact on related sectors including automotive, telecom, media and technology.

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Other whitepapers available to selected industry participants include China in Transition, Electronics in Southeast Asia, and RFID - Contactless Payments in Asia. Email more@fusionc.com to request your free copy.
## Abbreviations, acronyms and definitions

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<tr>
<th>Abbreviation</th>
<th>Definition</th>
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<tr>
<td>B2B</td>
<td>business to business</td>
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<td>B2C</td>
<td>business to consumer</td>
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<tr>
<td>CAGR</td>
<td>compound annual growth rate</td>
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<td>GIS</td>
<td>geographic information system</td>
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<td>GPS</td>
<td>global positioning system</td>
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<td>ITS</td>
<td>intelligent transport system</td>
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<td>M-commerce</td>
<td>mobile commerce</td>
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<td>RFID</td>
<td>radio frequency identification</td>
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Why Telematics matters

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Why Telematics matters

Telematics’ impact goes beyond the automotive industry, with most potential in Northeast Asia

Key research findings

- It is not only the automotive industry that needs to work out a business strategy related to Telematics.

- Telematics has an impact on other industries too:
  - Financial services.
  - Telecom.
  - Media.
  - Logistics.

- Increasing car ownership and economic activity, high penetration of mobile technology and growing traffic density help drive Telematics development.

- The best potential markets for Telematics in Asia are: Japan, Korea and China.
Why Telematics matters

Telematics gives access to affluent consumers, and is becoming a part of the Internet economy

Car-owning consumers are generally more affluent; a consumer group that marketers want to reach out to

Telematics devices will become significant as Internet-enabled equipment in the future

Number of vehicles on the rise in Asia as economies develop

Telematics uptake is impacting not just the auto industry but others including telecom, media, logistics, etc.
Why Telematics matters

The Telematics business model comprises three tiers: Consumers, facilitators and vendors

Source: Fusion Consulting
Why Telematics matters

Future Telematics adoption will be lead by driver assistance and relationship management

Asia: Telematics development stages

**Main directions**

**Late 1990s**
- Early stage
- To use Intelligent Transport Systems (ITS) to better manage city traffic
- To provide essential traffic news and information

**2000-05**
- Developing stage
- To improve driving experience
- To make content available to dashboard

**2006-10**
- Maturing stage
- To integrate Telematics with other wireless technology
- To manage relationships with cars/drivers

**Telematics usage**

- Traffic alerts and news
- Traffic congestion reduction

- Navigation
- Car positioning
- Information and entertainment

- Driver assistance
- Remote car diagnostics
- Vehicle relationship management
Why Telematics matters

Telematics brings improvements in revenue and efficiency to several industries

Impact of Telematics on value propositions of various industries

- **Car manufacturers**
  - New revenue from hardware & services

- **Media/content providers**
  - New revenue from content subscription

- **Insurance/financial services**
  - Improved personalization & tracking

- **Telecom operators**
  - New revenue from data/voice/mobile Payment; increased network efficiency

- **Logistics industry**
  - Improved supply chain efficiency

Source: Fusion Consulting
Why Telematics matters
For car manufacturers: Telematics services as a differentiator

Strategic impact

- Telematics will be a value-added item and offer higher margins for car manufacturers.
- New revenue streams in the format of:
  - Hardware sales e.g. navigation devices.
  - Subscription plans e.g. traffic alerts.

Brand impact

- Telematics creates new consumer experiences that make driving simpler and safer.
- Telematics offers a new branding platform, shifting from functionality-based branding to lifestyle-based branding for car manufacturers.

Over time, car manufacturers have moved their focus of business downstream in the value chain.

Services and customer experience are the focus, rather than parts and functionalities.
Why Telematics matters

For insurance/financial services: Better customer knowledge via improved tracking

Better customer knowledge

- Car insurance companies and financial institutions will be able to:
  - Track the risk associated with driving.
  - Offer individually priced insurance based on drivers’ profile and driving patterns.

Better use of knowledge

- This paradigm shift in the car insurance industry is enabled by the use of telematics technology e.g. GPS.
- Data streams are constantly feeding back to the insurer’s database about:
  - Road conditions.
  - Traffic conditions, e.g. congested areas.
  - Speed conditions.
  - Travel patterns.

With telematics technology, car insurers will be able to track driving behaviour and car movements.

New types of auto insurance products, e.g. pay-as-you-drive, will emerge.
Why Telematics matters

For telecom operators: Enhanced revenue from B2B and B2C Telematics services

B2B telematics revenue generators
- Telematics service providers pay for network transport and service delivery.
- Corporate customers and logistics companies pay for fleet management applications and data/voice traffic.
- Car manufacturers pay for installing SIM cards in vehicles.

B2C telematics revenue generators
- Phone subscribers pay for time- or data-based usage of Telematics services, e.g. personal navigation/positioning through a mobile phone screen.
- Telematics subscribers pay for miscellaneous mobile vending, e.g. parking fees, etc..

China Unicom works with Beijing Ancai Cstarcom Technology, a Telematics service provider specializing in positioning.

Users with Cstarcom’s vehicle monitoring services receive location updates from China Unicom, paying China Unicom for data usage.
Why Telematics matters

For media/content providers: A new content distribution and consumption platform

New distribution channel

- Telematics delivery of content represents a new distribution channel for media/content providers, although there might be some overlap with content delivered to other mobile devices.

Revenue opportunities

- Revenue opportunities exist in premium content such as geography-specific information, location-based shopping guides, etc..

Economies of scale

- As the installed base of Telematics users grows, media/content providers will enjoy economies of scale and better returns.

One of the challenges for media or content providers in Telematics is the need for frequent content updates and serving geography-relevant content as the end-user is on the move.
Why Telematics matters

For logistics industry: Improved supply chain efficiency

Better management

- Better commercial fleet management – Telematics provides two-way wireless communication between vehicles/drivers and trucking company locations.
- With GPS tracking, drivers on the road can be deployed and diverted at short notice to take on new assignments, resulting in:
  - Flexibility in route planning.
  - Increased vehicle usage rate.
  - More efficient usage of capacity.
  - Reduced fuel consumption.

Better communication

- Better delivery of instructions – in addition to voice-based messages, text- and graphic-based messages can be delivered and shown properly on the truck dashboard.
- Benefits are:
  - Improved data accuracy and reduced confusion.
  - Better shipment and location information.
  - Clearer instructions for cargo pick-up and delivery.

RFID and Telematics Combo:

The two main components of supply chain costs are inventories and transportation.

RFID improves the inventory management process while Telematics improves the transportation process.

By employing both technologies, overall supply chain efficiency is improved.
Why Telematics matters

Telematics overview
- Industry drivers & obstacles
- Telematics development

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Telematics overview

Telematics = communication + location

Telematics is a communication technology for the automobiles based on information flowing to and generated from vehicles via wireless networks.

Telematics has two major features:
- Two-way communication through wireless technology
- Location-sensitive technology

Devices are installed on vehicles. Broadly speaking, there are two major market segments:
- Systems market – telematics devices pre-installed by car manufacturers
- After market – telematics devices installed by car owners as separate purchases

Telematics adoption requires joint industry collaboration between car manufacturers, telecom operators, media companies, government, public service agencies and technology companies.
## Telematics Value Chain

### Activities

<table>
<thead>
<tr>
<th>Content creation</th>
<th>Application development</th>
<th>Content aggregation</th>
<th>Network transport</th>
<th>Access interface</th>
<th>Access interface</th>
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</thead>
<tbody>
<tr>
<td>• Create and maintain telematics content e.g. traffic info, weather info, etc.</td>
<td>• Build, test and maintain IT applications and solutions</td>
<td>• Aggregate content</td>
<td>• Maintain the delivery network of telematics services</td>
<td>• Produce telematics devices</td>
<td>• Deliver and present telematics content to end-user</td>
</tr>
<tr>
<td>• Manage the billing of products/services</td>
<td>• Customise content according to end-user/driver requirements</td>
<td>• Monitor the network traffic</td>
<td>• Integrate devices with user interface</td>
<td>• Consume the telematics content</td>
<td></td>
</tr>
</tbody>
</table>

### Key players

- Content providers
- System developers
- System integrators
- Content aggregators
- Telecom operators
- Car manufacturers
- Car component manufacturers
- Car engineering companies
- End-users/drivers
- Media industry
- Government e.g. police, highway administration
- System integrators
- Telecom operators
- Car engineering companies
- End-users/drivers
Telematics overview

Uses of Telematics range widely from navigation through safety to entertainment

- **Navigation/Traffic**
  - Positioning
  - Traffic information

- **Information/Entertainment**
  - News or location-sensitive updates
  - Stock quotes
  - Video-on-demand
  - Music-on-demand

- **Communication**
  - Voice call
  - Data call

- **Safety/Monitoring**
  - Emergency alerts
  - Anti-theft

- **Driver assistance**
  - Remote diagnostics
  - Service registration
  - Technical help
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Industry drivers & obstacles

Growing vehicle density & congestion creates need for traffic information

Vehicle density growth in Asia

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<tr>
<th>Country</th>
<th>1990</th>
<th>2000</th>
<th>CAGR</th>
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<td>0</td>
<td>120</td>
<td>10.7%</td>
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<tr>
<td>India</td>
<td>0</td>
<td>60</td>
<td>9.1%</td>
</tr>
<tr>
<td>Korea</td>
<td>40</td>
<td>120</td>
<td>8.7%</td>
</tr>
<tr>
<td>Australia</td>
<td>40</td>
<td>40</td>
<td>2.8%</td>
</tr>
<tr>
<td>Singapore</td>
<td>40</td>
<td>140</td>
<td>2.4%</td>
</tr>
<tr>
<td>Japan</td>
<td>40</td>
<td>80</td>
<td>2.0%</td>
</tr>
</tbody>
</table>

Key dynamics

- Vehicle density on the rise in major Asian countries.
- Vehicle density growth in the 90s ranged from 2% to 10.7% in Asia, while it was only 1.6% in United States.
- Increasing vehicle density and traffic congestion help trigger the need for better driving route planning and demand for real-time traffic information.

Source: United Nations Economic and Social Commission for Asia and the Pacific; Fusion Consulting analysis
Industry drivers & obstacles

High mobile phone penetration serves as a strong base for Telematics

**Key dynamics**

- Strong mobile phone penetration in Asia.

- This large base of mobile phone subscribers will be significant to the growth of telematics, especially in the aftermarket telematics, where mobile phone integration with cars will be the main value proposition.

- 100% or above mobile phone penetration is expected in Australia, Hong Kong, Singapore and Taiwan in year 2009.

- 80% or above mobile phone penetration is expected in Korea and Japan in year 2009.

Source: Pyramid Research, IDC, Economist Intelligence Unit
Industry drivers & obstacles

Increasing car ownership represents a growing potential user base in Asia

Key dynamics

- Car ownership in Asia will increase as the Asian economy grows. This provides a strong growing base for telematics services.

- Between year 2005 and 2009, new passenger car registration is expected to grow in Asia, ranging from 0.6% to 13% per annum.

- China and India are the fastest growing countries in terms of new passenger car registration.

- Japan is and will continue to be the largest market for new passenger car in terms of volume.

New passenger car registrations in Asia

Source: Economist Intelligence Unit
Industry drivers & obstacles

Varied language, culture and technology in Asia complicates Telematics development

Main obstacles to Telematics development

- Heterogeneous language and culture
  - In Asia, multiple languages are in use, very unlike the United States, where English is the default language.
  - Telematics services providers need to carry out product/content localization as well as customized user interface design to accommodate the diversity in language and culture in Asia.

- Fragmented market with different telecom standards
  - Telematics involves integration with various telecom systems and standards.
  - In Asia, various mobile communication standards are used, making it difficult to achieve the economies of scale.

- Varied availability of geo-information
  - Collecting and managing raw data like real-time traffic information does not come cheaply.
  - A few countries, e.g. China, have concerns about making detailed mapping data available as there will be risk exposure and national security issues.
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Japan and Korea emerge as the top potential markets for Telematics based on technology (mobile and Internet).

China and India look to have potential once future car ownership is factored in, especially considering that urban mobile and Internet penetration is much higher than the country average.
Japan, Korea and China are the preferred markets by Telematics players.
Japan, Korea and China offer the best potential for Telematics

<table>
<thead>
<tr>
<th></th>
<th>Australia</th>
<th>China</th>
<th>Hong Kong</th>
<th>India</th>
<th>Japan</th>
<th>Korea</th>
<th>Singapore</th>
<th>Taiwan</th>
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<td>Car production scale</td>
<td>Low</td>
<td>High</td>
<td>Low</td>
<td>Medium</td>
<td>High</td>
<td>High</td>
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<td>Low</td>
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<tr>
<td>Vehicle density</td>
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<td>High</td>
<td>High</td>
<td>High</td>
<td>Medium</td>
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<tr>
<td>Car industry sophistication</td>
<td>Medium</td>
<td>High</td>
<td>Low</td>
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<td>Low</td>
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<tr>
<td>Electronics industry sophistication</td>
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<td>High</td>
<td>Medium</td>
<td>High</td>
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</table>

Source: Fusion Consulting
Government support is strong in Korea and Japan; the industry is nascent in China

- Car manufacturers are active in Telematics.
- Good government support and infrastructure.

- Strong collaboration between Telematics players.
- Good government support and infrastructure.

- Telematics market still in early stage.
- Strong growth in car ownership and vehicle density.
Telematics development

In Japan, Telematics activity is being lead by car manufacturers

Background

- The automotive telematics industry in Japan arose from a governmental initiative begun in 1996 to build Intelligent Transport Systems (ITS).
- ITS aims to improve driving comfort, efficiency, safety and security, and reduce environmental costs resulting from traffic congestion.
- This initiative is called VICS (Vehicle Information and Communication Systems), allowing drivers to receive real-time road traffic information about congestion and regulation.

Current landscape

- Current Telematics development in Japan is mainly driven by car manufacturers e.g. Toyota, Honda, etc.
- Major car manufacturers are offering their own branded telematics devices installed on the vehicles.
- Traffic information and navigation are the major application of Telematics currently.

Outlook

- More sophisticated application of Telematics e.g. remote car diagnostics is expected.
- Telematics will be a useful tool for car manufacturers to do CRM (Customer Relationship Management) as it gathers various information about the car usage and drivers’ driving pattern.
Telematics development

**Toyota, Nissan and Honda have been the major Telematics players in Japan since 2002**

<table>
<thead>
<tr>
<th>Provider/company</th>
<th>Project/initiative</th>
<th>Year launched</th>
<th>Services/features</th>
</tr>
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<tbody>
<tr>
<td>Toyota</td>
<td>G-BOOK</td>
<td>2002</td>
<td>Traffic information</td>
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<td></td>
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<td>Navigation</td>
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<td>Email</td>
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<td>Emergency assistance</td>
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<td></td>
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<td></td>
<td>Removable SD (Secure Digital) card media reader</td>
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<tr>
<td>Nissan</td>
<td>CARWINGS</td>
<td>2002</td>
<td>Traffic information</td>
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<td>Navigation</td>
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<td>Maps</td>
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<tr>
<td>Honda</td>
<td>PremiumClub</td>
<td>2002</td>
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<td>Navigation</td>
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<td></td>
<td></td>
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<td>Internet</td>
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<td></td>
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<td>Helpdesk</td>
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</table>
KDDI and NTT are the major Japanese telecom operators in Telematics

- KDDI’s EZweb service provides drivers with driving direction assistance and information from VICS (Vehicle Information and Communication System).
- KDDI mobile phone subscribers can also access traffic information via the mobile phones.
- In end 2006, they plan to launch three-dimensional mapping with images of buildings and other objects within a radius of 50 meters from major intersections in Japan's 12 major cities.

- Its popular i-mode services provide comprehensive information to mobile users and drivers.
- Under i-mode, “i-area” is a service that automatically selects and displays i-mode content related to the location of the i-mode user. Users do not select service areas since the base stations automatically recognize their locations.
- It has a joint service with Nissan called Okutto-Keitai, allowing drivers to receive i-mode digital maps and restaurant information corresponding to the area in which their car is located.
Strong collaboration between Telematics players in Korea

Background

• The Ministry of Information and Communication of Korea’s Government has a master plan entitled "IT 8.3.9 project" to trigger a growth momentum in the ICT industry by designating 8 services, 3 infrastructures and 9 industries as Korea's new growth engines. Telematics is one of the industries designated.

• In 2003, KOTBA (Korea Telematics Business Association) was founded jointly by players in the mobile telecommunication, automotive maker and device industries.

Current landscape

• A Telematics Information Center (TELIC) is established to provide an “one-stop” platform to provide core information e.g. traffic, accident alerts to the Telematics users.

• A “Jeju Telematics Model City” project is in place on Jeju city, one of the most famous tourist attractions with highest rate of rental car in Korea. This provides a real city-scale ground for testing and launching Telematics services.

• KTSF (Korea Telematics Standardization Forum) is established to work with private sectors to work out standardization for Telematics content and hardware.

Outlook

• Telematics will be part of Korean Government’s vision for “Ubiquitous Korea” (often known as “U-Korea”). This is the envisioned future in which people to have uninterrupted access to the Internet, via fixed lines or mobile networks, any time, anywhere.
### Telematics development

**Hyundai/KIA and Renault Samsung are the early Telematics players**

<table>
<thead>
<tr>
<th>Provider/company</th>
<th>Project/initiative</th>
<th>Year launched</th>
<th>Services/features</th>
</tr>
</thead>
</table>
| Hyundai / KIA    | MOZEN              | 2003          | • Traffic information  
|                  |                    |               | • Navigation  
|                  |                    |               | • Emergency assistance |
| Ssangyong Motors | EverWay            | 2005          | • Traffic information  
|                  |                    |               | • Current location information |
|                  |                    |               | • Maps  
|                  |                    |               | • Golf course information |
|                  |                    |               | • Weather  
|                  |                    |               | • Vehicle control by mobile phone |
| Renault Samsung  | INS - 300          | 2003          | • Traffic information  
|                  |                    |               | • Navigation  
|                  |                    |               | • Rescue service |
SK Telecom is the leading Korean telecom operator in Telematics

• Launched a Telematics service titled "Nate Drive".
  • NATE Drive is a cutting-edge wireless Internet service that provides drivers with hands-free function and vital navigation information such as driving routing guidance, real-time traffic situations, facility location, emergency and rescue notification, as well as location and schedules of leisure and life, etc. through Global Positioning System (GPS) technology and cellular phone wireless network.

• "K-ways" is a Telematics service that offers convenient navigation service via mobile phone or in-car screen.
  • It also provides safe driving service e.g. voice guidance on violations of speed limit and traffic signals etc.

• Launched a Telematics service "ez Drive," enabling customers to find the fastest route to their destinations and provide traffic updates by voice and maps displayed on their mobile phones.
  • Plans are on the way to connect the navigation services with location-based data on fueling stations, restaurants, public facilities and other venues.
The focus in China is on content and navigation

**Background**

- China’s Telematics development is relatively “young”, comparing to Korea and Japan.
- The concept of ITS was formally introduced in the year 2000, when General Motors China and the Ministry of Science and Technology in China co-sponsored China’s first contest on intelligent transportation systems to promote research and applications in this area.

**Current landscape**

- China lacks the large-scale Telematics uptake driven by major car manufacturers, such as what the Korean and Japanese car manufacturers are doing in these countries.
- However, Japanese cars are more familiar brands in the mind of Chinese consumers. Certain Japanese brands e.g. Toyota, etc. are offering Telematics-enabled cars in China.
- Little effort is seen among the national or government level to drive the Telematics application in China.
- Telematics players are mainly centered around hardware and content e.g. mapping, navigation, etc.

**Outlook**

- The 2008 Beijing Olympics event is pushing the Chinese Government to improve city traffic management by installing ITS. Beijing is now developing an ITS as part of its preparations for the 2008 Olympics.
Positioning and navigation are the main Telematics applications in China

- China Mobile offers an industry-specific Telematics solutions for the transportation sector.

- It offers taxi fleet management solutions, allowing taxi operators to deploy vehicles, organize booking and monitor traffic situations.

- China Unicom works with third-party Telematics service providers to deliver regular location updates for vehicle monitoring purposes. China Unicom subscribers are able to receive short messages regarding their vehicle locations.

- Subscriber revenue is earned by the number of messages delivered or the amount of data consumed.

- Chinese car manufacturers are still new to the concept of Telematics, comparing to their counterparts in Japan and Korea.

- There is no large-scale Telematics activities in the car manufacturing stage.

- Telematics is still considered as something “optional”.

- Currently, telematics is mainly used in:
  - Car positioning
  - Navigation
Telematics development

Other Asian markets are still in the early stages

**India**
- Despite the impressive growth and use of telecom services, telematics in transportation in India is still at a nascent stage.
- In the long term (circa 2009), the India’s Telematics will be very sophisticated, as it capitalizes on its domain knowledge in automotive and technology, especially software technology.
- One of the active players is Tata Motors, part of the Tata group, India’s largest private business group.

**Taiwan**
- In Taiwan, Yulon Nissan, the Taiwan arm of Nissan, launched the telematics services under the name of “TOBE”.
- “TOBE” offers anti-theft feature, call center services as well as information services e.g. traffic report, weather forecast, etc.

**Australia**
- In 2004, Australian Government allocated a major grant worth $300,000 Australian dollars to the Australian Electrical and Electronic Manufacturers’ Association (AEEMA) to help drive the development of telematics in Australia.
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<table>
<thead>
<tr>
<th>Source</th>
<th>Website</th>
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<td>KTF, <a href="http://www.ktf.com">www.ktf.com</a></td>
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<td>LG Telecom, <a href="http://www.lgtelecom.com">www.lgtelecom.com</a></td>
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<td>Mapinfo, <a href="http://www.mapinfo.com">www.mapinfo.com</a></td>
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<td>Mozen, <a href="http://www.mozen.com">www.mozen.com</a></td>
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<td>Navinfo, <a href="http://www.navinfo.com.cn">www.navinfo.com.cn</a></td>
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<td>NTT Docomo, <a href="http://www.nttdocomo.com">www.nttdocomo.com</a></td>
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<td>Renault Samsung, <a href="http://www.renaultsamsung.com">www.renaultsamsung.com</a></td>
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<td>SK Telecom, <a href="http://www.sktelecom.com">www.sktelecom.com</a></td>
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<td>Tata Motors, <a href="http://www.tatamotors.com">www.tatamotors.com</a></td>
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<td>Telematics Update, <a href="http://www.telematicsupdate.com">www.telematicsupdate.com</a></td>
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<td>VICS, <a href="http://www.vics.or.jp">www.vics.or.jp</a></td>
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Appendix: Information sources

**Interview sources**

We are grateful to the following organisations for providing insights during our research:

Beijing Ancai
Continental Temic
Korea Telematics Business Association
Mapinfo
Navinfo China
Siemens VDO
Why Telematics matters
Telematics overview
Industry drivers & obstacles
Telematics development
Appendix: Information sources

About Fusion Consulting
About Fusion Consulting

Clear strategic advice in Asia Pacific

A business intelligence consultancy providing clear strategic advice on Asia Pacific markets

Our strategic advice
- Makes companies more successful
- Stems from business intelligence
- Is nurtured by experience

Our mission
- To be the partner of choice for pragmatic strategies in Asia Pacific

We help our clients
- Understand their markets
- Compete more effectively
- Grow into areas of opportunity
About Fusion Consulting

Industry experience in 14 countries

Strategy centres in Hong Kong, Singapore and Shanghai

**Directors** 10+ years research and consulting experience in Asia-Pacific

**Strategy Directors** developing recommendations for clients

**Business Analysts** gathering and analysing business intelligence

**Knowledge Specialists** tracking industries and economies

**Industry practices**
- Consumer & retail
- Chemical
- Financial services
- Industrial & logistics
- Information & communication technology
- Life science
- Media & leisure

Community of 300 consultants
- Know their local markets and business practices
- Have expertise in one of the industries we serve

---

Jun, Manila
BSc, 7 years in fixed and mobile telecom and Internet services

Ganesh, Mumbai
MEng, 30 years in chemicals, IT, telecom, medical and financial services

Rajendra, Pune
BE, 17 years in electronics, plastics, and industrial

Justin, Seoul
PhD, 16 years in agriculture, chemical and engineering

Xiaowen, Shanghai
MBA, 16 years in chemicals

Jerren, Singapore
BCom, 8 years in IT and telecom

Wayne, Sydney
MBS, 28 years in agri-chemical and food

Ti Fan, Taipei
MBA, 14 years in investment research, asset management and international investment

Kara, Tokyo
BA, 10 years in equities and technology

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Sunita, Ahmedabad
MCom, 13 years in broadcasting and IT

Sandra, Auckland
BA and MPP, 24 years in healthcare, biomedical, biotechnology and IT

Uday, Bangalore
PhD, 21 years in IT and media

Pakinee, Bangkok
MSc, 25 years in medical and finance

Timothy, Beijing
MBA, 22 years in paper and packaging

Phyllis, Guangzhou
MCom, 5 years in corporate banking and financial services

K.K., Hong Kong
MBA, 11 years in equities and financial services

Putera, Jakarta
MAG, 8 years in investment banking

Timothy, Kuala Lumpur
MBA, 9 years in telecom and chemicals
We start by understanding more about your business, your strategic intentions and what you already know about the market.

Our consultants bring practical expertise rather than academic knowledge in the industry and their home market.

We apply knowledge from one industry to another so you benefit directly from the best practices we have identified.

Deep business intelligence underlies all our recommendations, which are delivered with evidence you can dissect and discuss.
About Fusion Consulting

Range of services

Understand your markets
Monitor your markets and competitors. Benchmark your performance.
- Market profiles
- Customer intelligence
- Market update service

Compete more effectively
Size your competitive opportunities and make the most of them.
- Market sizing and modeling
- Competitive intelligence and strategy
- Value chain consulting

Grow into areas of opportunity
Prioritise your expansion options. See how to grow and who to partner with.
- Business expansion strategy
- Market entry strategy
- Partner evaluation and selection