



15 August 2009

From: Michael L. Sena  
To: Sharon Gill  
Telematics Update Newsletter Article  
Ref: EuropeanTelematics\_TU\_22AU8  
Re: A Telematics View of Europe

There are many views of Europe. It is the sixth-largest of seven continents, extending west from the Dardanelles, Black Sea, and Ural Mountains to Iceland. In etymology one theory suggests the name *Europe* is derived from the Greek words meaning broad (*eurys*) and face (*opsis*)—*broad* having been another word for Earth in the reconstructed Proto-Indo-European religion. It is comprised of a plurality of ethnic groups fused into forty-eight countries. Twenty-seven of these countries have joined together to form the European Union, and thirteen of them have combined their currencies into the Euro.

The EU is not Europe. There are still twenty-one countries that are not members, including Russia. With an economically revitalized Russia, the political and commercial realities of Europe are changing quickly. Russia is now the single largest country car market in Europe, having passed Germany in 2008—three years earlier than had been predicted just a few years ago.

What is an appropriate view of Europe from a telematics perspective? What are the issues that need to be considered when developing a pan-European telematics strategy for the next decade in this still new century? For the purpose of defining and delivering telematics services, the relevant geographical, political and monetary European entity is and will remain for the foreseeable future the individual and sovereign country. The EU is a federation of independent countries with their own legislative and judicial bodies, and it is the countries that have the responsibility for and control over their police forces, ambulance and rescue services, as well as other social services inside their own borders. In this sense, there is no difference between members of the EU and non-members, like Norway, Switzerland, Ukraine or Russia. Private companies (e.g., Mondial or Securitas) and associations (e.g., ADAC or TCB) delivering roadside assistance, security or other telematics-related services, operate within their respective borders, whether or not the countries are members of the EU. Even those companies that have European group offices register subsidiary companies in each separate country where they operate.

Looking at the implementation of telematics services by each of the four automotive companies that offer systems in Europe at this time, namely BMW, Fiat, PSA and Volvo, their roll-outs have been on a country-by-country basis. They all started in their “home” market and progressively added new countries to the list of where the system is sold and

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services provided. Each of these companies is working with its own constellation of central telematics service provider and local call centre and services provider for roadside assistance, emergency call, information other content. This is as much to comply with country regulations as it is for the convenience of the customer. Police forces and public service answering point (PSAP) authorities do not normally respond to calls for assistance made to them from outside their countries in a foreign language. The number and distribution of the PSAPs varies greatly from country to country. Germany, for example, has over nine hundred PSAPs that respond to a 112 phone call, while in the UK there are only two centres that are on the first line of contact. France has a requirement that a private company responding to an emergency call from a telematics system must be officially registered, while other European countries have no such regulations.

One of the most important information services for drivers is traffic information. Thus far, traffic information has been collected by companies operating in a single country. Examples include ITIS and Trafficmaster in the UK; T-Traffic in Germany; B-Mobile in Belgium. In some countries, such as Sweden, Switzerland, Spain and The Netherlands, traffic information and dissemination has been under the control of the public sector. But this can change quickly, as it did in Italy, where Infoblu took over this role for the state. Even TomTom, with its new traffic service based on processing mobile phone data and delivering this information to its PNDs via the GSM network, is selling this service one country at a time.

An initiative started in 2002 by the European Commission and the ITS industry, a pan-European eCall system, proved to be more difficult to implement than its backers first thought. A major part of the problem has been the automotive OEMs' reluctance to put systems in their vehicles before the individual country infrastructures are prepared to accept the messages that would be sent to them. The *Björn Steiger Stiftung*, a non-profit foundation, is trying to move the process along by offering to serve as the bridge between the vehicles and the country PSAPs. This approach would not be limited to only the EU countries, but could extend to all European countries that are willing to connect up to the service—for free!

There are other signs that the country-centric telematics services model may be changing. Inrix, a US-based traffic information company, has recently announced that it will be aggregating traffic information from multiple European sources. Navteq announced in February of 2008 that it would be bringing its NavTraffic service to Europe. In the US, NavTraffic and Inrix compete for most of the OEMs' traffic information business. One of the ways that traffic data is delivered in the US is via the XM/Sirius satellite digital radio network. Ondas Media, a company based in Madrid, is attempting to bring to Europe the benefits of high bandwidth digital data transfer and high quality digital sound with its own satellite digital radio system. Nissan and BMW have already signed up for the service once Ondas and its partners have put the satellites up in the air, which is scheduled to be in 2011. This will allow data services to be delivered anywhere in continental Europe.

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