

THE TELEMATICS NEWS

FROM OVER THERE

2004 - 2005

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HIGHLIGHTS

- ⬇️ GM closes OnStar Europe
- ⬇️ Mercedes halts expansion of TeleAID
- ⬆️ BMW offers services outside Germany (Italy, UK)
- ⬆️ Volvo rolls out in NL, FR, IT and pan-Europe
- ⬆️ Peugeot introduces e-Call in FR and DE
- ⬆️ A new customer service center, Inter Mutuelles Assisance, enters the market
- ⬅️ TargaInfomobility, ATX Europe, T-Mobile Traffic and WirelessCar still in business

SCORES AND STANDINGS

- ↑ ATX Europe – BMW +50,000
- ↖ Targa Infomobility – Fiat +50,000
- ↓ On Star – 25,000 subscribers; 100,000 systems
- ↖ T-Mobile Traffic – 40,000 Mercedes 10 and Audi - 30
- ↑ WirelessCar – Volvo Cars, Volvo Trucks
- ↑ Mondial – Volvo Cars, BMW, Mercedes
- ↖ Ygomi/SEI – test phase only



MAJOR DEVELOPMENTS

- Quality problems with proliferation of electronics system in high-end vehicles causes some manufacturers to halt programs
- Insurance companies wakening to benefits of having an in-vehicle device for pay-for-use premium calculations
- Stolen vehicle tracking gaining in importance
- EU promoting safety aspects of telematics, including automatic eCall and Speed Alert



STANDARDS. WHAT STANDARDS?

✓ SOS

✓ Interoperability of Map Data Media

✓ Network Services

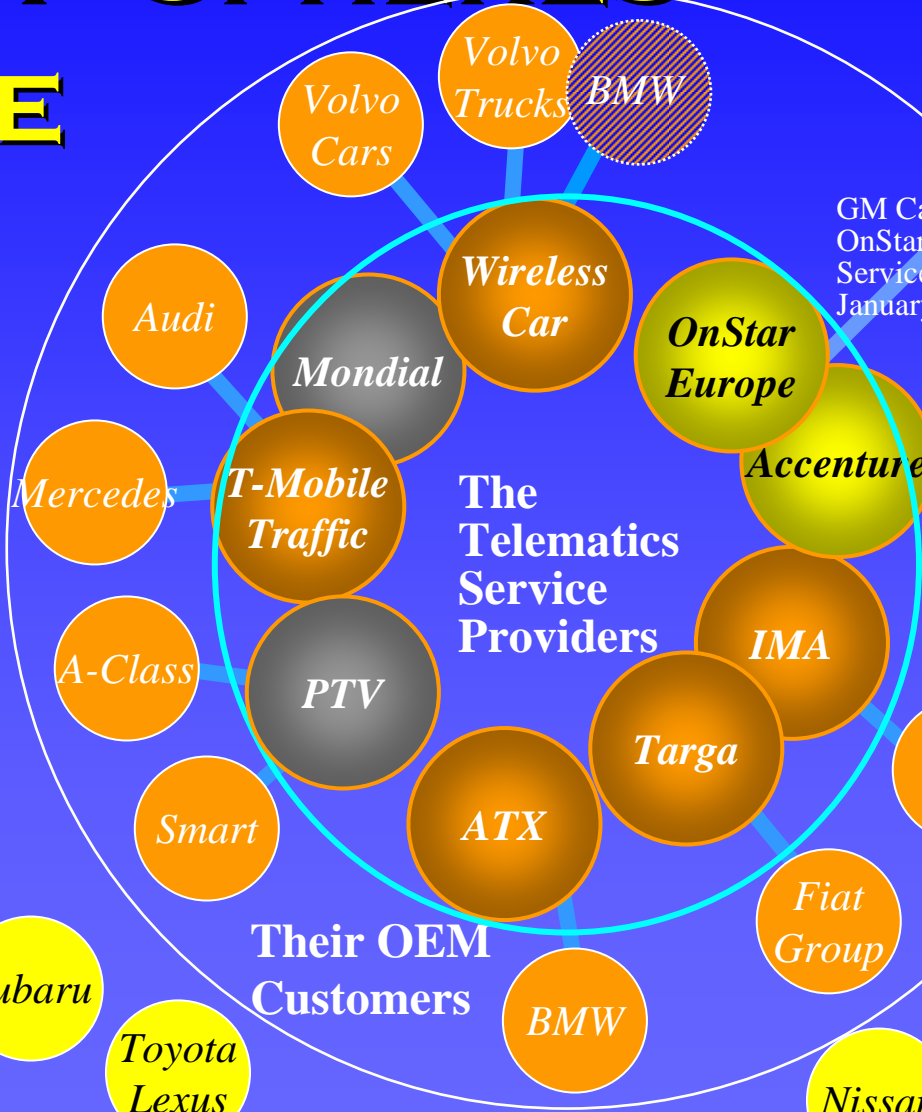
THE TSP SPHERES

EUROPE

The Not-So-Active OEMs

- VW
- Porsche
- Rover
- Honda
- Acura

- Subaru
- Toyota
- Lexus



VEHICLE AND DRIVER-CENTRIC ITS FUNCTIONS - 2004

Emerging Challenger Volvo Audi Renault PSA	Market Leader BMW Daimler Chrysler
Nissan Ford Honda Toyota Struggling	Fiat GM Europe New Market

VOLVO CARS

- The only pan-European telematics service with local call centers.
- The only telematics system that has solved the direct connection to UK emergency services
- The only embedded SIM-card with local charges in the home market.
- With BMW, the only telematics system that has delivered on its promises to roll out service multiple European countries.

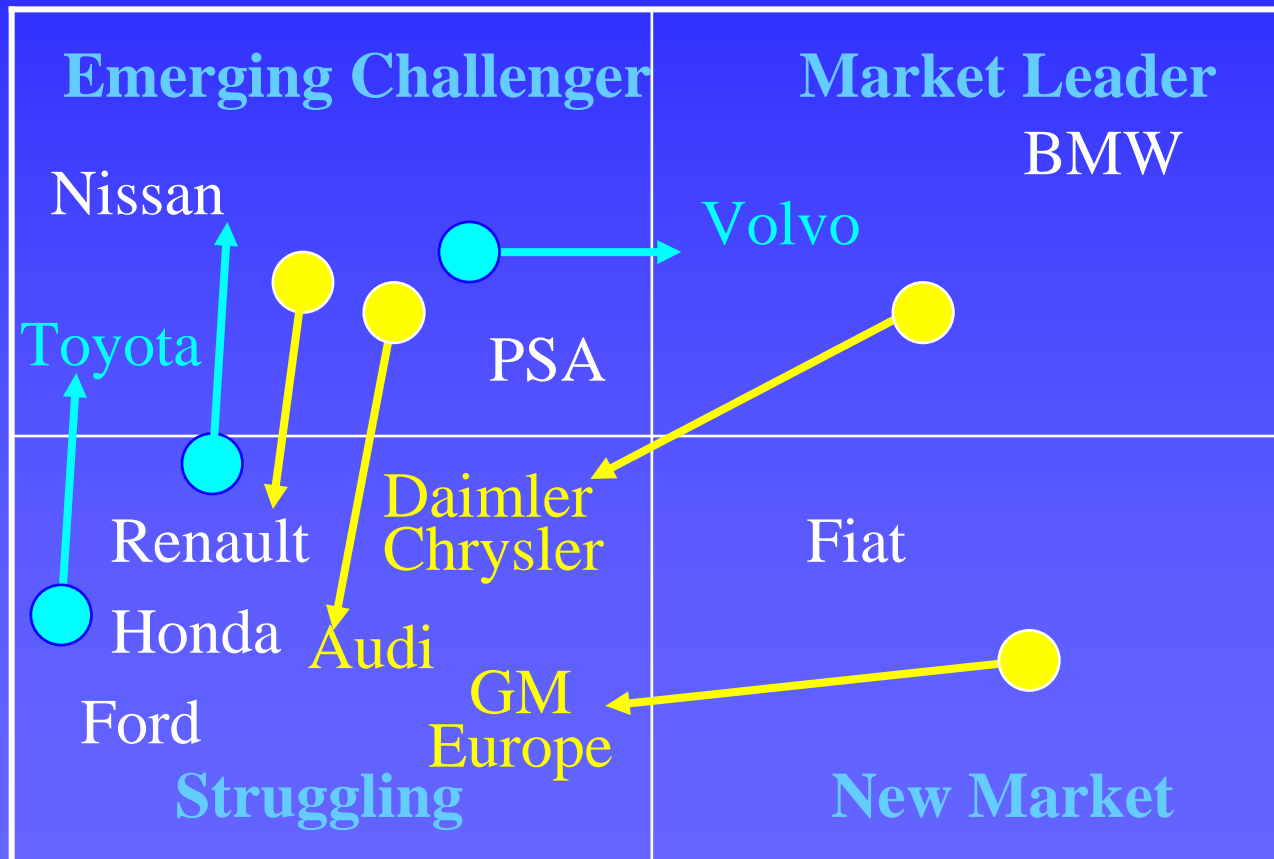


SUMMARY

- 2005 promises to be a building year, with little or no major growth.
- The
- The
- With.



VEHICLE AND DRIVER-CENTRIC ITS FUNCTIONS - 2005



VEHICLE AND DRIVER-CENTRIC ITS FUNCTIONS IN EUROPE

OEM	Telematics Services	Dynamic Navigation	ADAS Applications	Data Expertise	Research Activities	Standards Activities	Telematics Service Provider
Daimler Chrysler							T-Mobile Traffic
BMW							ATX ¹
Volvo							Wireless Car



Very Active in Development and Deployment



Somewhat Active in Development and Deployment



Marginally or Not At All Active in Development and Deployment

1. BMW is working with WirelessCar in Dubai

VEHICLE AND DRIVER-CENTRIC ITS FUNCTIONS IN EUROPE

OEM	Telematics Services	Dynamic Navigation	ADAS Applications	Data Expertise	Research Activities	Standards Activities	Telematics Service Provider
GM Europe							Accenture
Fiat							Targa Infomobility
Audi							T-Mobile Traffic



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VEHICLE AND DRIVER-CENTRIC ITS FUNCTIONS IN EUROPE

OEM	Telematics Services	Dynamic Navigation	ADAS Applications	Data Expertise	Research Activities	Standards Activities	Telematics Service Provider
Ford							None
Renault							None
PSA							None



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VEHICLE AND DRIVER-CENTRIC ITS FUNCTIONS IN EUROPE

OEM	Telematics Services	Dynamic Navigation	ADAS Applications	Data Expertise	Research Activities	Standards Activities	Telematics Service Provider
Toyota	□	◉	◉	□	□	□	None
Honda	□	□	◉	□	◉	◉	None
Nissan	◉	◉	□	●	●	□	None



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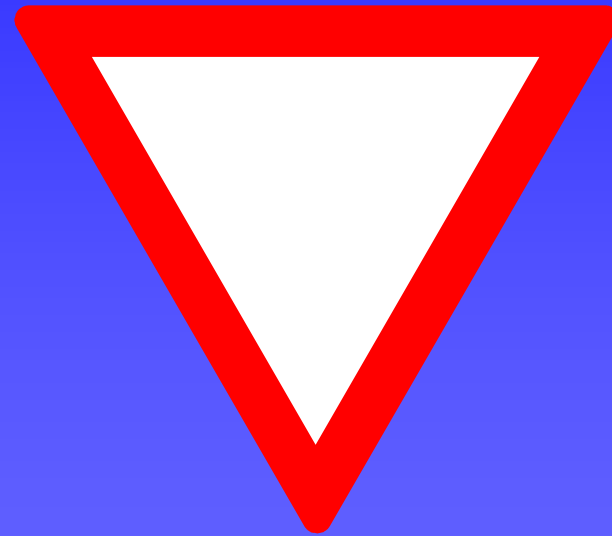


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THANK YOU



Questions?