



# Connected Car and The Corporate Customer

The Opportunity For Network Operators  
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## Masternaut at a Glance

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“Masternaut design and deliver innovative telematics solutions that enable customers and partners to achieve revolutionary step-changes in their performance and service delivery.”



€100m

Revenue



550

Employees



11 Countries  
throughout Europe  
Pan European Coverage

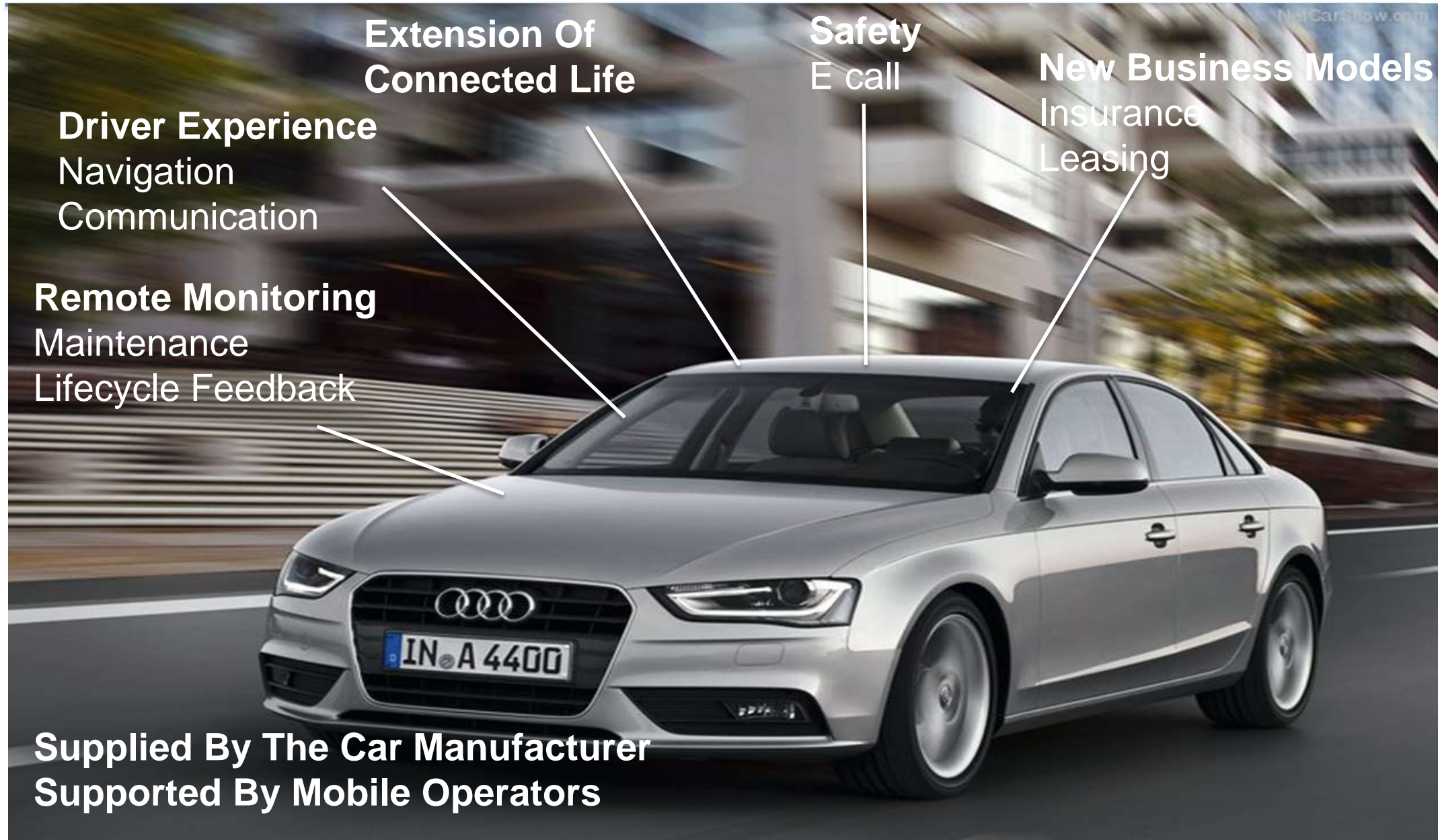


15,000+

Customers



# The Connected Car , The Future Driving Experience





## There is another side

Not all cars are new

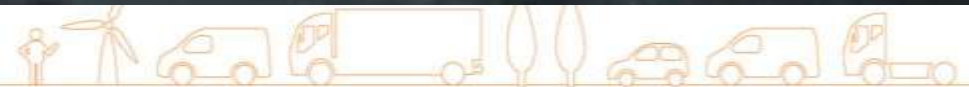
Cars have a longer development cycle than consumer and business markets

Business Needs Differ From Personal Needs

The Business Need for Connected Services Are Larger Than The Personal Needs

More than 10% of vehicles are actually commercial vehicles

Between 10 % and 40 % of medium to high end cars are owned or financed by business





# The Connected Commercial Vehicle

## Driver Management

- Driver ID & Verification
- Integrated Satellite Navigation
- Workflow (Routing & Scheduling, Messaging)
- Driver Vehicle Checks
- Working Hours Management
- POD & Barcode Scanning

## Routing & Scheduling

- Route Planning
- Integration for Planned vs Actual Reporting
- Navigation & Proof of Delivery Options

## Vehicle Management CANbus Interface

- Driver Performance Measurement
- ecoScore™
- Preventative Maintenance
- Engine Management Reporting
- Emissions Monitoring
- Real-time Fuel Economy
- Vehicle Status (i.e. Tyre / Oil Level etc.)

**Low Market Penetration  
High Service Revenues  
Strong ROI**





# The Connected Heavy Goods Vehicle

## Tachograph Interface

- Remote Download & 12 Months Storage
- Speed, Distance & Time Recorded
- Digital & Analogue Supported

## CANbus Interface

- Driver Performance Measurement
- ecoScore™
- Preventative Maintenance
- Engine Management Reporting
- Emissions Monitoring
- Real-time Fuel Economy
- Vehicle Status (i.e. Tyre / Oil Level etc.)

## Driver Management & In-Cab Communications

- Hands-Free Communication
- Driver ID & Verification
- Integrated Truck Navigation
- Workflow (Routing & Scheduling, Messaging)
- Driver Vehicle Checks
- Working Hours Management
- Email & Web-Access
- POD & Barcode Scanning

## Trailer Tracking

- Battery or Powered via Suzie Cable
- Real-time, Weekly or Monthly tracking
- RFID Reader Interfaces
- Power Take-Off Monitoring (i.e. tail-lift crane)
- Box Temperature Recording
- Door Opening and Load Space Security

## Tractor Tracking

- Live Location Reporting
- 20-Second Updates inc. MapMatching™
- Operational control
- Management reporting
- Compliance without complexity

## Remote Axle Weight Monitoring

- Remote Monitoring of Gross Vehicle Weight
- Automatic Reporting of Infringements
- Third-Party Integration (Including RedForce, Avory Weight Tronix, Artec)





# The Connected Business Car

NextCarFlow.com

## ECO Standards

Lower Corporate Footprint

## Training

Better Driving

Safer Driving

## Governance

Tax and Expense Management

## Efficiency

Lower Fuel Costs

Lower Maintenance Costs

Lower Insurance Costs



# The Connected Business Car : New Breed Of Interests

## Insurers

Different driving patterns of fleet

## Leasing Companies

Mileage Management  
Maintenance Records  
Driver Scoring

## Government

Demand High Standards Of Monitoring  
Road Tolling  
Smart Cities

## Corporates

Cost Control  
Eco Driving





# Within The Business : Interest Across The Board



# New Corporate Services Exist Today



Corporate Dashboards On Fleet Status and Performance



New Generation Of Track and Trace



Eco Driving To Monitor Driving Performance



Tax and Expense Management



Insurance Applications



New Generation of Highly Accurate, Simple To Install Hardware





# Evolution Of The After Market ( Post Production)



## Consumer

Navigation  
Phone Integration



Replaced By in  
Car Capabilities  
Or Mobile Apps



## Light Commercial Vehicle

Basic Track and Trace  
Supplied By local companies



Corporate Services

Business Car Market

Who will address  
These markets ?



## Heavy Goods Vehicles

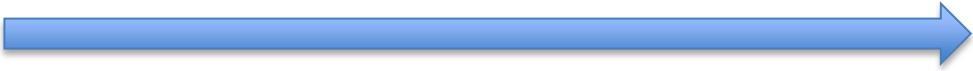
Heavily Integrated  
Logistics Solutions



Specific Services  
Tolling  
Tachograph



# New Services and Customers Need New Suppliers



## Older Generation

- SME Company
- Integration Of Components

## Large Investments Needed

- Large Breadth Of Product
- Higher levels Of Support
- Higher Scalability and Reliability
- Need To Support Global Client
- Corporate Sales Approach



## New Generation Of Suppliers

Existing Players Investing



Consumer After Market



Operator Acquisition

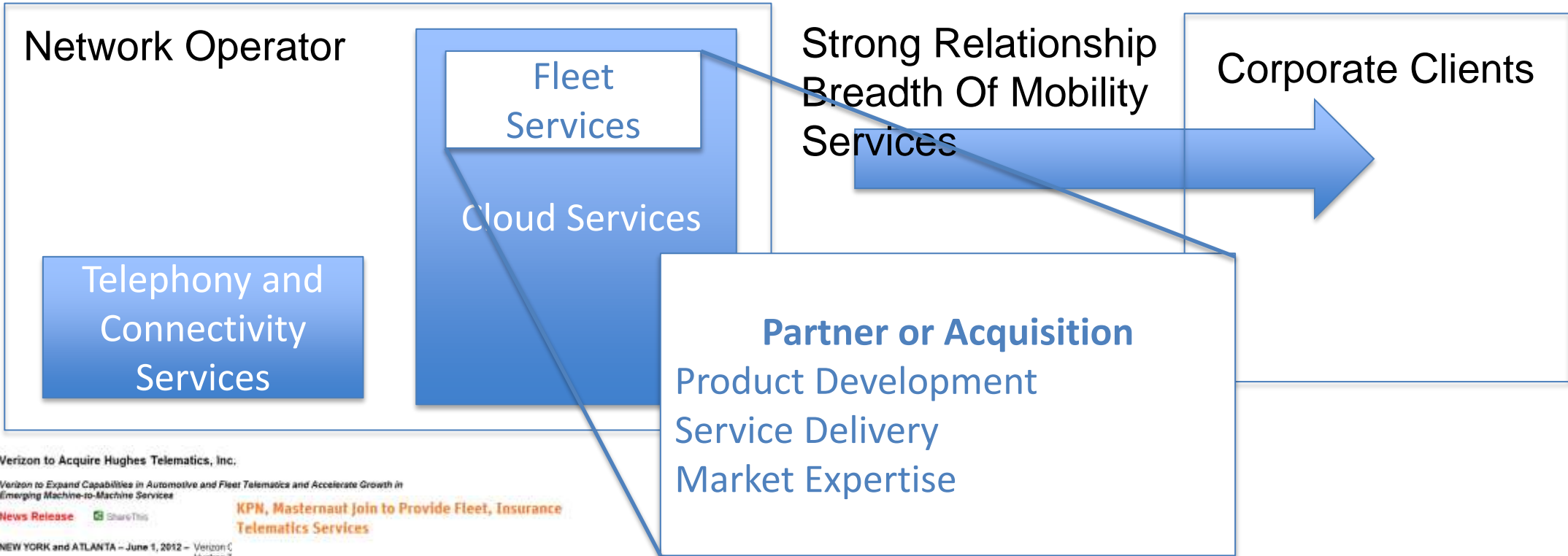


Operator Partnerships





# Why Are network Operators Entering The Market



## Verizon to Acquire Hughes Telematics, Inc.

Verizon to Expand Capabilities in Automotive and Fleet Telematics and Accelerate Growth in Emerging Machine-to-Machine Services

News Release [Share This](#)

NEW YORK and ATLANTA – June 1, 2012 – Verizon Communications Inc. (NYSE:VZ) and Hughes Telematics Inc. (NASDAQ:HTSI) today announced a definitive merger agreement under which Verizon will acquire Hughes Telematics in cash, for a total of \$612 million.

November 7, 2013

KPN and Masternaut have announced an agreement to jointly develop and market telematics-based products for businesses looking for safety and operational efficiency.

## Telefónica & Masternaut Reach Agreement to Jointly Market Fleet Management Services

12 September, 2011

Madrid, 12 September 2011. - Telefónica and Masternaut have reached an agreement to jointly market telematics-enabled fleet management services that allow businesses to make dramatic cost savings, while delivering improvements in customer service and employee safety. Both Telefónica and Masternaut will share product roadmaps to create market-leading future products.

The agreement, which gives Telefónica's professional services access to Masternaut's world-leading telematics



Telefónica & Masternaut

Telefónica & Masternaut

**Partner or Acquisition**  
Product Development  
Service Delivery  
Market Expertise

- **The Opportunities Lie Within Their Customer Base**
  - **Medium To Large Corporate Business**
- **It Fits Their Vision**
  - **Cloud Services**
  - **Vehicle Centric Services**
- **It is an existing and growing market**
  - **The market still in low adoption**
- **It allows positioning for future services**



# the future market already exists in the after market

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## ❖ Connected Cars

- The ability exists
  - The cost is reducing
  - The cost benefits in the business world are high

## ❖ Cloud Services

- Standard one exists
- Specialist services are being delivered

## ❖ Big Data

- Data is already being extracted from cars
- The Business Model Can Be Developed Through Third Party Products

- ❖ But it is not being delivered to the full market because it is being delivered by specialist companies without the marketing capabilities of oems and operators.





# Three Key Points

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## **The After Market Compliments The Connected Car**

- **Early Access to Services**
- **Development Of Specialist Services**
- **Provides Service Breadth**

## **The Corporate Market Is A Key Growth Segment**

- **There are Needs Across The Board**
- **Real ROI**
- **High ARPU**

## **Network Operators Will Play A Key Role**

- **Corporates are existing clients**
- **Services are extension of their cloud strategies**





Thank You  
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