



TABLE OF CONTENTS

Introduction

Birds Eye View

Executive Summary

The Basics

What's New?

Analysis

Summary Tables

Next Steps

RELATED SBD REPORTS

526 – Connected Services Guide

These set of reports provide detailed descriptions and comparisons of: services, technologies, key suppliers & partners, business models, architectures, availabilities of services per model and country.

China, Europe and North America reports are updated quarterly.

#546



Digital
Connected
Services

LCV Fleets Connected & Digital Services Guide

In the passenger vehicle segment, the use of connected car services is widespread - with many OEMs having launched their services in at least one market. Today, an ecosystem of connected service offerings provides a wealth of benefits for consumers and service providers alike. However, the connected services market for the Light Commercial Vehicle (LCV) segment is still in the early stages of maturity.

In a similar fashion to passenger vehicles, this segment is continuing to benefit from a small, but rapidly growing, ecosystem of dedicated connected services – including fleet management and navigation. As this ecosystem develops alongside the growth of the LCV segment, a wider variety of use cases and connected service offerings will be enabled. This variety will allow those closest to the LCV landscape, including fleet managers and service providers, to benefit from the opening of new revenue streams as the demand for LCVs continues to increase.

Our LCV Fleets Connected & Digital Services Guide provides key, up-to-date, insights into the connected services available for vehicles in the segment. In doing so, it details the landscape of these services while identifying the strategies being leveraged by service providers to deliver them. The report similarly highlights the latest supplier-OEM partnerships that will facilitate the development of new connected technologies, and assesses which OEMs have the most competitive connected service offering for LCVs overall.

COVERAGE



FREQUENCY



PUBLICATION FORMAT



PAGES



Request price

Key questions answered

- > Which OEMs have the most competitive connected service offering for LCVs?
- > How aggressively are OEMs pricing connectivity across each of their LCV models?
- > How aggressively is connectivity being fitted in the LCV eco-system?
- > Which suppliers are OEMs relying on the most for different parts of their connected LCV eco-system?

This research supports



Competitive Landscaping



Technology Prioritization



Strategy Setting, Business Case & Monetization



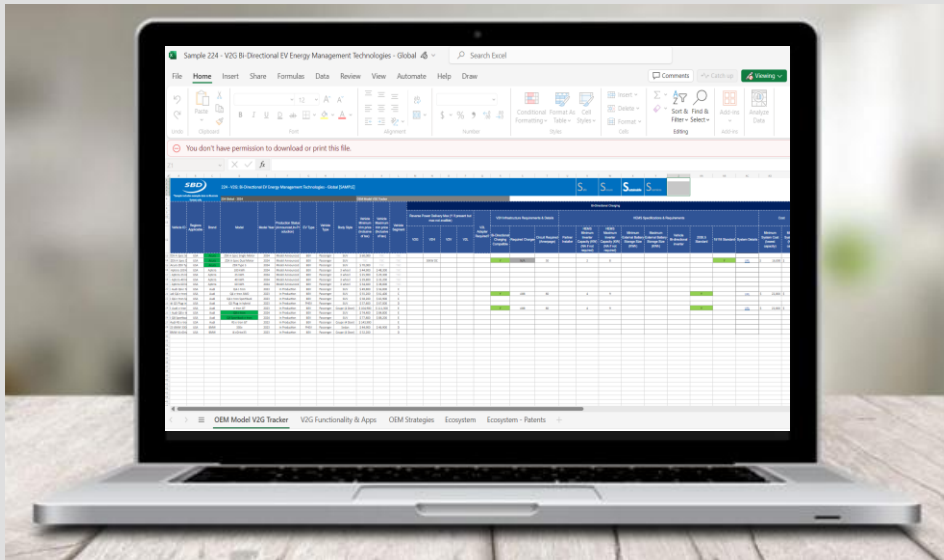
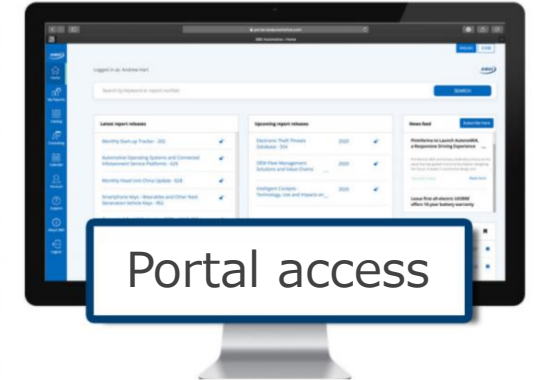
Partner Identification

Do I have access?

100+ Reports published per year

50k+ Slides of insights, forecasts & data

4,000+ # of auto professionals who access our reports



View Excel Data Sheet Sample

LCV Fleets Connected & Digital Services Guide

For a variant-level connectivity platform/feature/pricing data including dashboard showing OEM competitiveness and query builder

>35,000 datapoints

11+ OEMs, 40+ models

Dashboard, Ranking, etc.,

[Click for Sample >](#)



[Request price >](#)



546 - LCV Fleets Connected & Digital Services Guide

546 – Connected Service Guide - LCV

[Introduction »](#)

5

- OCS: Subscription
- Data payments

[The Basics »](#)

7

- Sales volumes
- Explore

[Executive Summary »](#)

11

[Summary Tables »](#)

41

- Understanding OEM
- Citroen
- Fiat
- Ford
- Fuso
- Hyundai
- ISUZU
- IVECO
- Jeep
- MAN
- Maxus
- Mercedes-Benz
- Mitsubishi
- Nissan
- Opel
- Peugeot

- RAM
- Renault
- Renault Trucks
- Toyota
- Volkswagen
- Explore

[What's New? »](#)

16

- New models launched
- Announcements
- Partnerships
- Case study

[Next Steps »](#)

64

[Analysis »](#)

21

- FMS for Driver
- FMS for Operator
- Other Connected Services (OCS)
- Connectivity
- Services availability
- FMS: Availability
- FMS: Subscription
- OCS: Packages

[Contact Us »](#)

67



Introduction



Introduction

In the passenger vehicle segment, connected car services are widespread - with many OEMs having launched their services in at least one market. Today, an ecosystem of connected service offerings provides a wealth of benefits for consumers and service providers alike. However, the connected services market for the Light Commercial Vehicle (LCV) segment is still in the early stages of maturity.

In a similar fashion to passenger vehicles, this segment is continuing to benefit from a small, but rapidly growing, ecosystem of dedicated connected services – including fleet management and navigation. As this ecosystem develops alongside the growth of the LCV segment, a wider variety of use cases and connected service offerings will be enabled. This variety will allow those closest to the LCV landscape, including fleet managers and service providers, to benefit from the opening of new revenue streams as the demand for LCVs continues to increase.

The Connected Services Guide – LCVs report provides key, up-to-date, insights into the connected services available for vehicles in the segment. In doing so, it details the landscape of these services while identifying the strategies leveraged by service providers to deliver them. Similarly identified are the supplier-OEM partnerships providing new technologies for this landscape.

This guide does not aim to cover data commercialization partnerships that OEMs enter with aftermarket Fleet Management Services (FMS) providers. For more details on how these partnerships work, [please consult SBD report 631 for more details.](#)

Section	Content
The Basics	Overview of the connected services types for LCVs that we have considered for the report.
Executive Summary	An overview of the connected services provided by the different OEMs for LCVs, the prevailing FMS by OEMs, and pricing strategies for these services. Conclusion: There are opportunities to develop in the FMS category of connected services for LCVs, while also keeping an eye on connectivity and pricing strategy.
What's New?	Section focusing on notable announcements, mergers & acquisitions, and other relevant trends in the connected services segment. Conclusion: The evolving ecosystem with different players entering the LCV segment is influencing the partner choice for the OEMs in order to develop FMS
Analysis	An in-depth look into the data-driven market dynamics, the connectivity preferences, pricing, availability trends and trial periods involved with connected service features. Conclusion: A closer look shows a wide service variety with large differences in pricing, free trials, and trends for connectivity types and features.
Summary Tables	Each slide in this section details OEM-supplier mapping in terms of in services and the latest infotainment system available. It also features a grid placing each OEM based on its FMS and number of other connected services implemented across its LCV range
Next Steps	Can SBD help you with any unanswered questions?



Example slides from the report

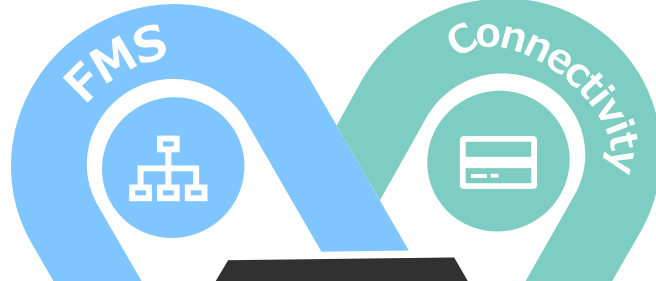
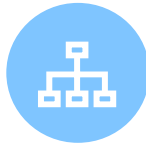
A screenshot of a report slide is shown within a white border. The top portion of the slide features a photograph of a large outdoor car lot filled with many small cars, likely used vehicles, arranged in neat rows. Below the photograph is a dark blue horizontal bar containing the SBD logo on the left and the text '546 - Connected Services Guide - LCVs' on the right. At the bottom of the slide is a prominent blue button with rounded corners, containing the white text 'Request price' followed by a white right-pointing chevron symbol (>).



Report Outlook: LCV Connected Services

Fleet Management Services

LCVs are provided with Fleet Management Services as a key factor for ease of use of the fleet managers in terms of vehicle diagnostics, job management, and driver behavior



Connectivity

The services are integrated through several different channels, from Cellular to smartphone connectivity



Other Connected Services (CS)

Other Connected services cover several aspects of a connected vehicle which are in common to the Passenger vehicles along with LCVs



Pricing & Subscription

OEMs use different approaches to their connected services through standard features and others offered via yearly/monthly subscriptions



Content

The services investigated here for LCVs are aimed at improving safety, security, and vehicles' future-proofing. In terms of fleet management, they also enhance the efficiency, safety, and cost-saving capabilities of a range of services



Architecture

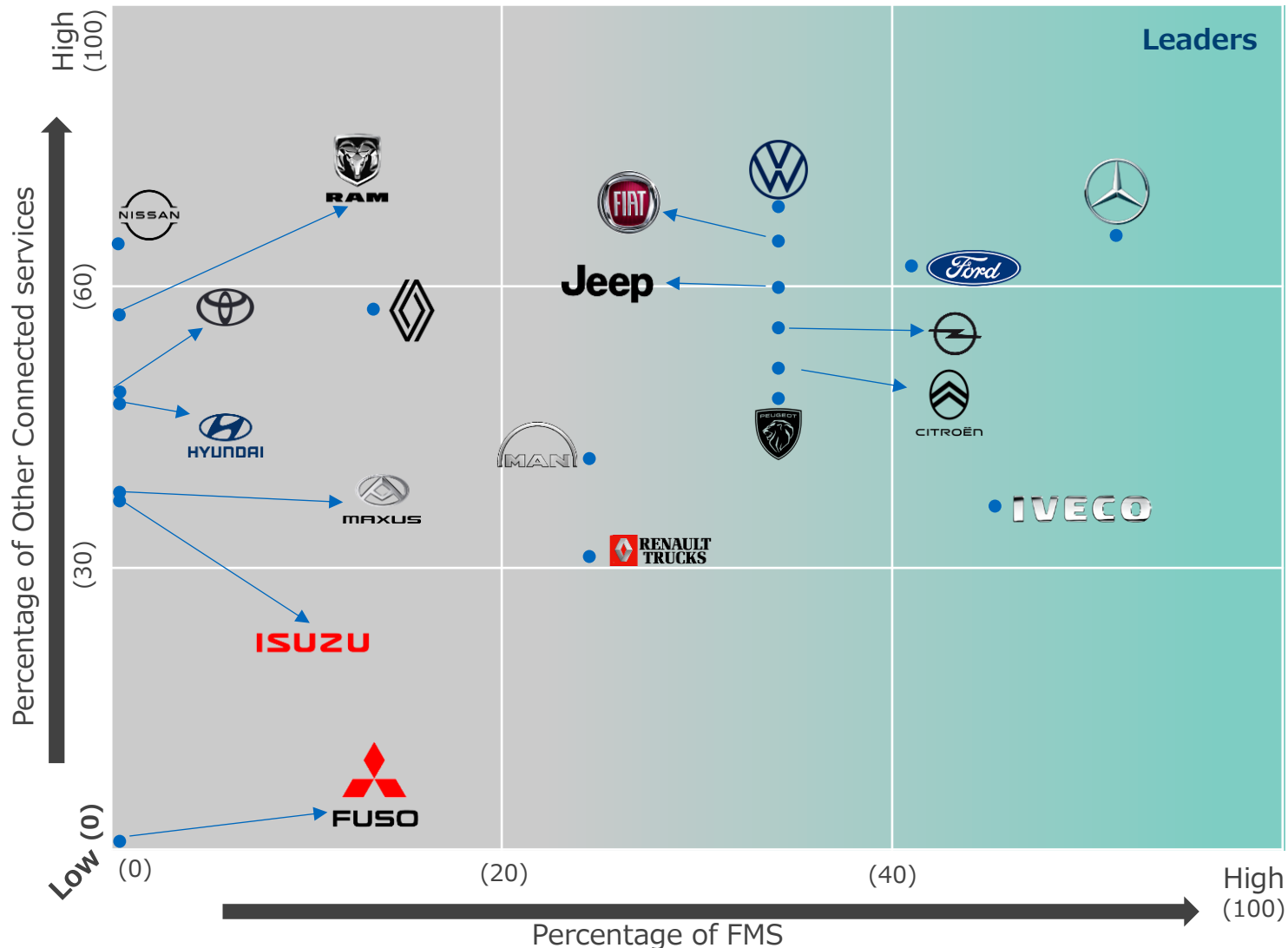
Each OEM has a different approach to proprietary connected services and their integration. The widespread use of Android Auto and Car Play can make the experience more consistent across different platforms



LCV Connected Services

Where? are OEMs for LCV in Connected Services market

Connected services are dominating the LCV market for OEMs with a variety of services. The graph below represents the number of connected features against the fleet management service features offered by the OEMs. The placement of players in the below graph provides a better view of the competitors in terms of services availability and their type, provided by the OEMs across the Europe region.



Key Highlights

- **Mercedes-Benz** followed by **Ford** are the OEMs with high penetration of both FMS and 'Other' Connected Services, which place them in the top right section of the chart.
- **Ford and IVECO** are the only two volume brands that are somewhat competing with premium OEMs i.e., Mercedes-Benz in terms of FMS and connected services offering.
- **IVECO and Volkswagen** are the OEMs that have higher features in the FMS for the **driver** services along with **Ford** for the FMS for **Operator** connected services.
- Majority of the OEMs are positioned in the left part of the graph highlighting a **faster adoption of 'other' connected services** relative to FMS adoption and in line with the global trend.
- A few OEMs like **ISUZU, Fuso, Hyundai, Toyota, Nissan, Maxus and RAM** are yet to start providing FMS services to the LCVs.
- Overall, the variety of service availability is instrumental in achieving higher sales* volume. E.g., **Mercedes-Benz, Ford RAM, Fiat, Renault, Volkswagen and Citroen** have a high share in the last rolling year (Q2 2022 – Q1 2023)



Case study: Ford Pro



Summary

Fleet managers in enterprise typically have to juggle multiple vendor solutions for lease/finance management, TCO, fuel spend, and field operations. Operators have typically been reliant on 3rd party aftermarket fleet management solutions (FMS) but Ford is aiming to provide these services collectively under a single 'Ford Pro' umbrella.

Ford, which already sells thousands of LCVs and pickup trucks to commercial customers, saw this as a huge opportunity and launched Ford Pro in May 2021. Aiming for volume and consistency, Ford Pro's commercial fleet management solution is available in both EU and USA. Customers benefit from a cloud-based SSO interface which can be used to gain insights into their fleet regarding uptime, vehicle health, financing and driver information. Ford benefits by deepening its relationship with the customers beyond 'transactions' and can have regular touchpoints through a large network of dealerships when the vehicles are brought to service, thus improving the trust and bolstering Ford's CRM. Ford Pro is receiving regular updates and can support competitor OEM vehicles also, albeit with less functionality.

Ford Pro Announcements

April 2023	<u>Ford Pro launches all-new E-Transit Courier, an electric commercial vehicle with enhanced connectivity and productivity</u>
Sept 2022	<u>Ford Pro launches all-new Transit Custom</u>
May 2022	<u>Ford Trials Geofencing Tech That Could Automatically Reduce The Speed Of Vehicles To Improve Safety For All</u>
April 2022	<u>Ford Pro Open For Business To Drive Productivity For Europe's Commercial Fleets</u>

Overview of Ford Pro

Ford Pro is Ford's connected services suite available to fleet owners (both commercial and government) that integrates various fleet management services – telematics, charging information, vehicle health monitoring, and driver behavior to name a few. Businesses can benefit in terms of the ease of operations as all the services are available in one single dashboard that learns user preferences over time.

Services through Ford Pro for LCV

Ford offers services bundled under the name as follows: Ford Pro Telematics, Telematics Essentials, E- Telematics (for EVs) and Data services

Together, these services are aimed primarily to improve the business efficiency by reducing downtime, and monitoring the location and status of the entire fleet (oil, engine health etc.)

Examples



GPS Fleet Tracking



Driver Behaviour Insight



Vehicle Health Alerts & Telematics Drive app



Fuel Efficiency Analysis

Ford Models Getting Ford Pro

Ranger	Transit Van	Tourneo Custom	Tourneo Connect
Transit Connect	Transit Custom	E Transit	E-Transit Courier



FMS for Driver: Driver Behaviour Coaching (4/6)

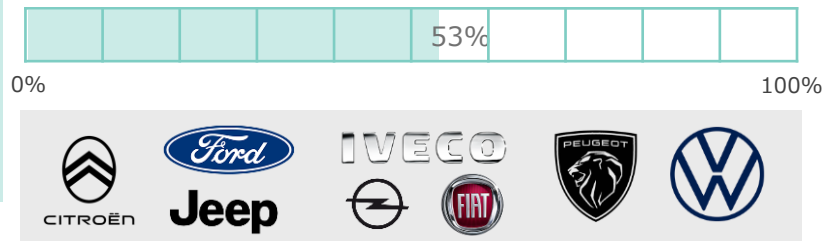


Driver Behavior Coaching

FMS for Driver

Driver coaching systems can reduce unwanted behavior, by training the drivers' intuitions and empowering them to coach themselves, while offering an escalation path that keeps managers informed and in control

OEMs on the scale currently**



State of the Art

OEM

Speeding Events [View Report](#)

FLEET TOTAL
1,226

+193%
since previous 30 days
(807 events)

VEHICLES BY SPEEDING EVENTS	F	OVER THRESH	OVER LIMIT	TOTAL
Fedex		122	77	199
1FTEW1EP9LFC48037		3	106	109
TT F150 Lightning		0	111	111
Stan Bradbury's		0	105	105
Salaj's VIN		0	91	91

Features

- Excessive idling, speeding, harsh braking and acceleration are typically the first measures that OEMs apply for driver behaviour monitoring.
- SBD expects OEMs to use IVI to display feedback to drivers in future.

Source: Ford

Aftermarket



Features

- Almost all aftermarket solutions offer driver behavior monitoring.
- In-dash retrofit devices offering real-time driver notification of violations are offered by some.
- Driver apps becoming common.

Source: Greenroad

OEM entry into the FMS market / Key Highlights / Maturity of OEM vs Aftermarket

Following fuel savings, driver behaviour improvement is a key selling feature in aftermarket FMS. The market has progressed beyond simple reports highlighting instances of speeding, idling, harsh acceleration/braking etc in manager reports: Event reconstruction is a popular addition and looks appealing in a product demo, but real change comes when drivers receive direct and timely feedback. So many aftermarket FMS companies now include either a scoring and improvement tips in the driver app or better still, in-vehicle feedback. OEMs are very well placed to provide such in-vehicle coaching due to their control over the IVI, so SBD expects to see more OEM implementations with even better differentiation in future products.

** (% represents the models available with some implementation of the services in this category).



Request the price

A screenshot of a website interface for a car dealership. The top part of the screenshot shows a large, high-angle photograph of a parking lot filled with many cars, mostly white and silver, arranged in neat rows. Below the photograph is a dark blue horizontal bar containing the SBD logo on the left and the text "546 - Connected Services Guide - LCVs" on the right. At the bottom of the screenshot is a prominent blue button with rounded corners. The button contains the text "Request price" in white, followed by a white right-pointing chevron symbol (>).



Contact SBD Automotive

Do you have any questions?

If you have any questions or feedback about this research report or SBD Automotive’s consulting services, you can email us at info@sbdautomotive.com or discuss with your local account manager below.



info@sbdautomotive.com



[Book a meeting](#)

USA

UK

Germany

India

China

Japan



Garren Carr
North America
garrencarr@sbdautomotive.com
+1 734 619 7969

Luigi Bisbiglia
UK, South & West Europe
luigibisbiglia@sbdautomotive.com
+44 1908 305102

SBD China Sales Team
China
salesChina@sbdautomotive.com
+86 18516653761

Andrea Sroczynski
Germany, North & East Europe
andreasroczynski@sbdautomotive.com
+49 211 9753153-1

SBD Japan Sales Team
Japan, South Korea & Australia
postbox@sbdautomotive.com
+81 52 253 6201