ABI RESEARCH COMPETITIVE RANKING

# COMMERCIAL TELEMATICS VENDORS

GEOTAB®


**OVERALL: 88.1 | INNOVATION: 88.8 | IMPLEMENTATION: 87.5 | RANK: 1**

GEOTAB®




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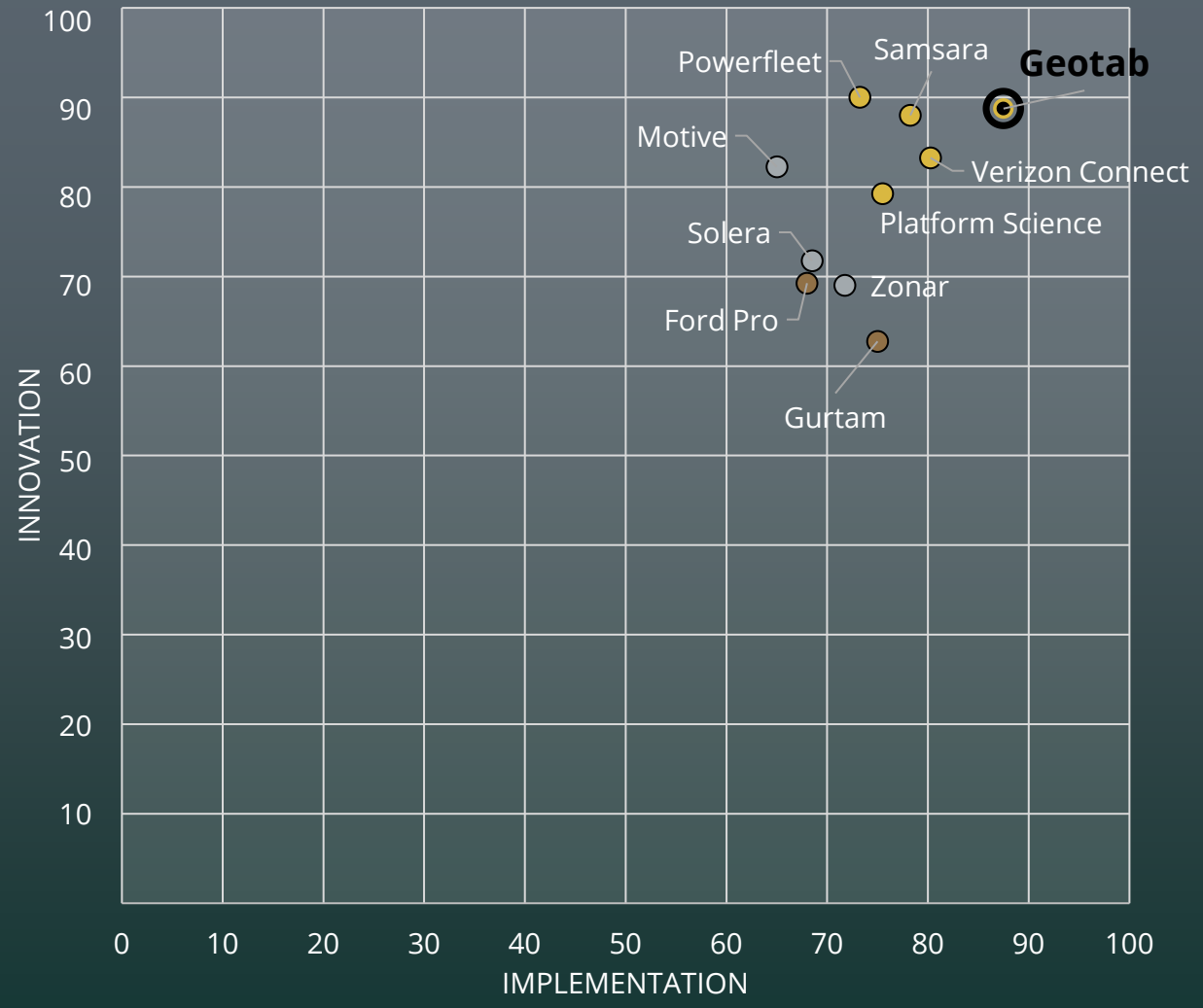
INNOVATION *VERSUS* IMPLEMENTATION MATRIX



# INNOVATION

GEOTAB

## INNOVATION SCORE: 88.8


For over 2 decades, Geotab has been providing scalable, secure, and reliable open-platform telematics for fleet management. With 16 offices globally, Geotab's revenue has grown consistently Year-over-Year (YoY) from US$412.3 million in 2021 to over US$681 million by the end of 2024. This year, it gained an additional 1,220 companies under its customer base, growing to over 4.6 million connected vehicles as of 2024. Geotab's open platform empowers fleets to make data-driven decisions by providing actionable insights from diverse sources. The company's hardware-agnostic solution supports Geotab GO devices, Geotab GO Anywhere asset trackers, OEM integrations, and third-party devices, allowing customers to unlock valuable insights from any data source to address key business challenges. As an open platform, Geotab goes beyond traditional fleet telematics and asset tracking offerings with the Geotab Marketplace—an ecosystem of over 430 fleet-focused solutions with almost 350 partners that help extend the power of Geotab for end fleets.

Geotab's innovative platform is built on the principles of openness, scalability, and customer-centricity, empowering fleets to solve critical business challenges and make data-driven decisions through actionable insights. By managing and processing high-resolution data from a wide range of disparate sources, including GO devices, OEM integrations, and third-party devices, the platform unlocks valuable intelligence that addresses key fleet management needs. When it comes to first-party hardware. Geotab's GO devices and GO Anywhere devices are apt for vehicles, as well as trailers and assets of various types. They also allow keyless entry and management systems for improved safety and efficiency. Its GO Talk in-cab solution can provide real-time feedback to drivers for improved performance and safety. The Geotab GO telematics devices are designed and engineered by Geotab's own team. This allows them to control the quality, functionality, and security of their hardware. Geotab designs and develops its IOX expansion modules in-house, ensuring seamless integration and compatibility with the GO devices. Geotab also sells third-party products through its third-party Marketplace.

It also sells third-party solutions such as Lytx, Netradyne, Sensata, and more than 25 video telematics solutions, as well as a wide range of asset tracking solutions such as Phillips SolarNet and Nova Mobile Asset Trackers. It allows Auxiliary System Integration (via CAN, USB, RS232, and Bluetooth® Low Energy (LE)) for Tire Pressure Monitoring Systems (TPMSs), temperature sensors, and door and vehicle switch sensors. This comprehensive ecosystem, combined with Geotab's open platform, allows customers to build a tailored solution that meets their specific requirements and integrates seamlessly with their existing workflows—a big differentiator compared to other vendors.

# INNOVATION

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Geotab is differentiated in its ability to manage, process, and deliver the power of data to drive intelligent decision-making for fleets. At the heart of this capability is CurveLogic, Geotab's patented algorithm that optimizes data acquisition and processing. CurveLogic enables Geotab to manage and deliver high-resolution data from diverse sources as mentioned previously, ensuring efficient data management even with massive data volumes. By minimizing bandwidth consumption and prioritizing essential data points, CurveLogic allows for real-time insights and actionable intelligence. This commitment to efficient and intelligent data management, combined with a flexible approach to solution delivery through a broad partner ecosystem, directly to some key customers, and Platform-as-a-Service (PaaS) channels, has positioned Geotab as a leader in data intelligence in the telematics industry. The proven value of Geotab's solutions, fueled by CurveLogic, has created a thriving market where partners actively seek to leverage deep data knowledge and advanced algorithms to deliver increasing value to their customers.

To ensure global coverage and compatibility, Geotab supports a wide range of network technologies to ensure global coverage and compatibility. 4G Long Term Evolution (LTE) is the primary network used by Geotab devices in most regions, providing reliable high-speed data connectivity for real-time tracking, data transmission, and communication. While 3G networks are being phased out in many areas, Geotab devices still support 3G connectivity where available, ensuring continued operation for customers in those regions. The Geotab GO device and the GO Anywhere asset tracker operate on Low-Power Wide Area Networks (LPWANs) ideal for asset tracking and applications that require long battery life and wide-area coverage, especially in remote locations. While direct satellite connectivity is not currently offered through Geotab's own devices, the Geotab platform supports integration with third-party satellite providers. This allows customers to leverage satellite connectivity for specific needs, such as tracking assets in extremely remote areas beyond cellular coverage.

Geotab recognizes that OEMs have diverse needs and priorities when it comes to telematics data. Due to this, it offers a range of flexible business models to accommodate different requirements. Each option provides secure access to rich datasets, advanced analytics, and actionable insights, empowering OEMs to optimize their operations and enhance their offerings. Geotab's OEM Telematics Data Platform provides a powerful solution for integrating data from OEMs directly into the MyGeotab platform. This allows fleet managers to access a comprehensive view of their fleet data, regardless of the vehicle's make or model, all within a single, unified system. It enables streamlined data collection from factory-installed items, facilitates secure data transfer and integration within MyGeotab, and produces actionable insights.

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MyGeotab is designed with an open platform architecture, making it highly accessible for IT teams to integrate and deploy the solution at scale. Geotab offers a variety of tools and resources to facilitate seamless integration with existing IT infrastructure and workflows. The MyGeotab platform provides a comprehensive and well-documented open API and Software Development Kit (SDK). This allows IT teams to programmatically access and interact with MyGeotab data, enabling custom integrations with other business systems, automation of tasks, and development of custom applications. Furthermore, The MyGeotab platform provides a comprehensive and well-documented open API and SDK. This allows IT teams to programmatically access and interact with MyGeotab data, enabling custom integrations with other business systems, automation of tasks, and development of custom applications. MyGeotab offers data feeds that allow for efficient streaming of data into external systems. This enables real-time data synchronization and integration with various applications, such as ERP, TMS, and business intelligence tools. This open-source solution provides an example of proper integration via data feeds and can serve as a foundation for developing new integrations with the Geotab platform. It pulls common datasets from MyGeotab and streams them into tables within various database types, simplifying the integration process.

Predictive collision risk, route optimization, breakdown alerts, predictive maintenance, engine diagnostics, driver behavior monitoring, dispatch management, and fuel consumption monitoring are just a few of the many use cases supported. Collision detection features have undergone significant advancements, utilizing AI-based algorithms trained on millions of real-world driving samples to accurately identify both major and minor collisions, while minimizing false positives. Upon detecting a major collision, the GO device captures high-resolution accelerometer and GPS data, transmitting them to the cloud for analysis. This provides insights into a collision's point of impact, magnitude, location, and timing. Additionally, by combining accelerometer data with motion data from the device tracker, minor collisions can be identified more reliably, providing valuable context for these events.

Another unique use case is Geotab's safety benchmarking via digital twin capability. It allows fleets to compare their safety performance against similar fleets based on factors like industry, fleet size, and vehicle type. This helps identify areas where the fleet excels and areas that need improvement. By analyzing anonymized, aggregated data from Geotab's vast network of connected vehicles, fleets gain valuable insights into how their safety performance stacks up against their peers. In addition, Geotab provides benchmarks based on industry standards and best practices, allowing fleets to assess their performance relative to established safety guidelines. Geotab's unique open platform allows for integration with other safety management systems, enabling a comprehensive view of safety performance and facilitating data-driven decision-making.

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When it comes to reporting and analytics, AI and Machine Learning (ML) are central to Geotab's ability to deliver fleet analytics, empowering commercial fleets to operate more productively, safely, and sustainably. A key example of Geotab's positioning as an AI leader in the fleet management space is Geotab Ace, a Generative Artificial Intelligence (Gen AI) assistant that allows fleet managers to access data through natural language queries. This tool democratizes data access, providing instant and clear answers to complex questions without requiring technical expertise—allowing fleet professionals to reimagine the way in which they work.

Finally, Geotab Ace, the Gen AI assistant built into the MyGeotab platform, further simplifies data analysis and reporting. Users can ask natural language questions about their fleet data and receive instant insights, customized reports, or visualizations. This empowers users of all technical skill levels to extract valuable information without needing advanced data analysis skills.

# IMPLEMENTATION

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## IMPLEMENTATION SCORE: 87.5


Geotab's implementation process prioritizes seamless onboarding and customer satisfaction. Both Capital Expenditure (CAPEX) and Operational Expenditure (OPEX) models are available to accommodate diverse budgetary needs and preferences. A robust global network of resellers ensures localized service, customized solutions, and dedicated support tailored to each customer's specific requirements. Resellers possess the flexibility to determine pricing based on factors such as fleet size, select features, and any value-added services provided. This flexible and customer-centric approach streamlines the adoption of Geotab's solutions and promotes a rapid ROI.

Currently, Geotab devices are certified to operate in 96 countries and the company is working toward providing service in an additional 32 countries. Geotab's solutions cater to a diverse range of industries, including transportation & logistics, vocational, rentals & leasing, field services, and government and public sector.

Geotab's GO telematics solution is vehicle agnostic. Due to its small form factor, rugged design, and long battery life, it is compatible with all makes and models, and can read over 10,000 vehicle data points depending on the vehicle's specifications. This broad compatibility is supported by its range of telematics harnesses, designed to match the diverse OEM On-Board Diagnostic (OBD) connectors found in various vehicles. Furthermore, Geotab's strong partnerships with over 37 OEM integrations into its platform ensures Geotab is at the forefront of telematics innovation. As an aftermarket solution, the GO device does not impact vehicle manufacturer warranties. In early 2021, Geotab announced the release of its upgraded GO9 telematics device, the GO9+, which gives users full real-time visibility of their fleet, providing up to 4 hours of connectivity with the engine off. Over 1 million GO devices shipped in 2023. In addition, Geotab offers a comprehensive solution for tracking trailers, equipment, and other assets, both in the yard and beyond. The Geotab GO Anywhere is a small form factor, low-cost, and high-efficiency asset tracker designed specifically for monitoring both powered and non-powered assets. This versatile device empowers businesses to enhance security, optimize utilization, and gain valuable insights into the location and movement of their assets, ultimately providing peace of mind and supporting theft management efforts.

Geotab leverages the Google Cloud Platform (GCP) to provide a highly-scalable and reliable service. This ensures customer data are always available, and the system can handle the demands of even the largest fleets. The solution is available via the public cloud, but is also offered for private cloud deployments for customers with specific security or data residency requirements.

# IMPLEMENTATION

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## IMPLEMENTATION SCORE: 87.5


Geotab's GTM strategy thrives on a powerful combination of diverse partnerships and a multi-channel approach, ensuring broad market reach and deep penetration across various sectors. Geotab's GTM strategy is built on an ecosystem of over 700 partnerships globally that has been developed over the past 20 years. Geotab's partner ecosystem includes cellular carriers, value-added resellers, fleet management companies, strategic fleet partners, and consulting partners. Geotab's partnerships span a range of resellers. It also has strategic alliances with consulting companies, system integrators, cellular carriers, fleet management companies, insurance companies, and OEMs.

Geotab's Marketplace continues to grow as a hub of innovative fleet-ready solutions, featuring over 350 partners that provide integrated solutions to extend the power of the MyGeotab and GO device platform. It is the largest telematics marketplace in the world, offering a diverse ecosystem of solutions to meet the unique needs of fleets across various industries. The Geotab Marketplace offers a range of solutions that span numerous categories such as asset/trailer tracking, cameras and Advanced Driver-Assistance Systems (ADAS), connected sensors, driver management and training, fleet management, fuel management, Electric Vehicles (EVs), maintenance diagnostics, and more.

Building on its strong ecosystem, Geotab announced a series of new partnerships last year, with companies such as Bridgestone, Synop, and KPMG Australia. For ease of integration with existing systems, Geotab's open-source SDK is a major differentiator. It allows bi-directional data flow between the MyGeotab platform and other software, enabling custom integrations and enhanced functionality. In addition, customers or partners can increase functionality by creating custom "add-in" buttons thanks to simple API connections, embedding solutions directly into the platform. Geotab's unique Marketplace also offers a growing ecosystem of pre-built integrations with popular TMS and ERP solutions, for example. In addition, its extensive partner network can assist with custom integrations and ensure seamless data exchange between systems.

Geotab can also directly integrate with vehicle Electronic Control Units (ECUs) to provide comprehensive engine diagnostics and odometer readings, enabling proactive maintenance management. The MyGeotab platform includes a dedicated maintenance module with customizable reminders based on time, mileage, or engine hours. It also offers predictive maintenance models, such as the Electrical System Rating, which proactively identifies potential battery failures.

# IMPLEMENTATION

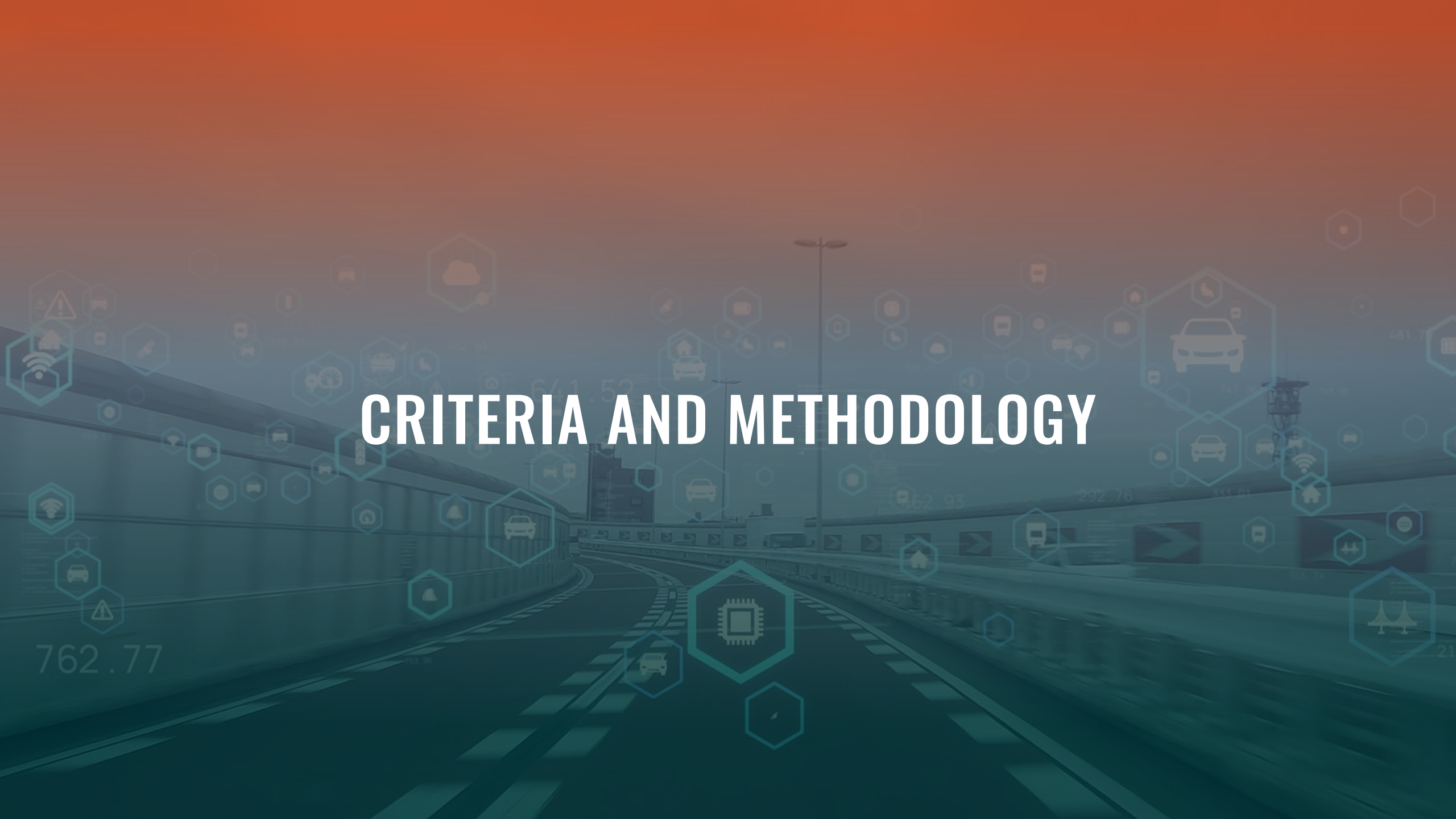
GEOTAB

## IMPLEMENTATION SCORE: 87.5


Geotab is designed for rapid implementation and immediate value out of the box for fast ROI. Thanks to its plug-and-play simplicity, Geotab is designed to be user-friendly. Its platform and resources empower newcomers to quickly grasp the essentials and effectively utilize Geotab's range of solutions. MyGeotab features a clean and intuitive interface that is easy to navigate. Key information and functionalities are clearly organized and readily accessible.

The GO device installs in approximately 15 minutes or less, plugging directly into the OBDII port or via a harness. No hardwiring is required, making it easy to move the device between vehicles if needed. The company prioritizes a frictionless onboarding experience. MyGeotab's automated onboarding process allows users to select their fleet priorities and then automatically tailors the system to user needs by configuring the system with relevant rules, reports, and dashboards. This ensures immediate access to key data and insights. For more advanced needs. MyGeotab offers extensive customization options, including custom rules, reports, and integrations with other systems. Customers typically report seeing a tangible ROI within the first 3 months of implementation.

For immediate utilization, Geotab provides live training sessions and self-help videos that can be completed within 2 hours. Geotab also provides contextual in-app help within MyGeotab, offering relevant support resources based on the user's current activity. This ensures users have access to the right information at the right time, minimizing frustration and enabling efficient problem-solving.



# CRITERIA AND METHODOLOGY

# VENDOR MATRIX

**Methodology:** After individual scores are established for innovation and implementation, an overall company score is established using the Root Mean Square (RMS) method:

$$Score = \sqrt{\frac{innovation^2 + implementation^2}{2}}$$

The resulting overall scores are then ranked and used for percentile comparisons.

The RMS method, in comparison with a straight summation or average of individual innovation and implementation values, rewards companies for standout performances.

For example, using this method, a company with an innovation score of nine and an implementation score of one would score considerably higher than a company with a score of five in both areas, despite the mean score being the same. ABI Research believes that this is appropriate as the goal of these matrices is to highlight those companies that stand out from the others.

# RANKING CRITERIA

**Leader**: A company that receives a score of **75 or above** for its overall ranking.

**Mainstream**: A company that receives scores **between 60 and 75** for its overall ranking.

**Follower**: A company that receives a score of **60 or below** for its overall ranking.

**Innovation Leader**: A company that receives a score of **75 or above** for its innovation ranking.

**Implementation Leader**: A company that receives a score of **75 or above** for its implementation ranking.

# INNOVATION CRITERIA

**Solution Options:** The hardware ecosystem, including the comprehensiveness of hardware and services, were assessed. Factors like solution portfolio breadth, scalability, customization, and cybersecurity offerings were taken into consideration.

**Open Platforms:** Vendors were asked to comment on the integration and data interoperability aspect of the solution. Factors like open Application Programming Interfaces (APIs) and Software Development Kits (SDKs) versus "walled-gardens" and marketplaces were considered.

**Use Cases:** This criterion is an evaluation of how telematics solutions support fleet efficiency via use cases like route optimization, breakdown alerts, maintenance reminders, driver behavior monitoring, fuel tank monitoring, spending management, etc.

**Quality of Reporting and Analytics:** Integration capabilities into a Transport Management System (TMS) or Fleet Management System (FMS) are accounted for in this criterion. In addition, real-time notifications of critical instances, engine diagnostics, and tracking of specific assets are also considered. This criterion also looks at how the platform integrates elements like a Global Positioning System (GPS) and vehicle diagnostics for real-time analytics. Actionable insights in terms of identifying the best truck load/unload practices, identifying the optimal area within a refrigerated truck to store a certain load, energy consumption pattern identification to enable energy savings and enhance sustainability, capabilities to support fleet electrification, etc. are accounted for. This criterion also looks to uncover if the system allocates resources or prompts changes to plans based on changing scenarios. Whether the Artificial Intelligence (AI) of the solution can detect safety risks present in the vehicle like equipment failure is also looked at.

**User Interface and User Experience:** Ease of use, integration of screens and input devices, dashboards, access across stakeholders, etc. are assessed.

# IMPLEMENTATION CRITERIA

**Market Share:** This criterion examines whether a supplier can point to a growing order book, increasing customer base, and examples of high-profile firms using the solution. Factors like the number of connected refrigerated vehicles, subscribers, pricing schemes, and price per sensor and gateway device are also considered.

**Geographical and Vertical Spread:** Evaluates whether a customer can roll out the solution globally without any regional restrictions. The spread of business verticals the solution caters to (e.g., food & beverage, trucking, LTL, pharmaceuticals, etc.), including the types of vehicles (refrigerated vans or trucks), is also a consideration.

**Solution Accessibility:** This criterion assesses whether the solution is available via the cloud (public, private, or hybrid) and if it is provided on a Software-as-a-Service (SaaS) basis with interfaces in both English and other spoken languages.

**Go-to-Market (GTM) Strategy:** This criterion evaluates the partnerships and channel strategy that supports the GTM strategy for the solution, including partnerships with firms across different regions, verticals, Original Equipment Manufacturers (OEMs), and technology specialists.

**Integration with Existing Systems:** This evaluates whether the solution provides APIs so that organizations can integrate with existing management systems, and how easy it is for the system to receive and transmit data to connected systems.

**Time to Value:** This evaluates whether a customer can use the full functionality of the solution out of the box, or does the solution require some customization? It also considers the time required for a customer to scale the solution across their facilities and start achieving and guaranteeing Return on Investment (ROI).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