

FROST & SULLIVAN

# BEST PRACTICES

AWARDS

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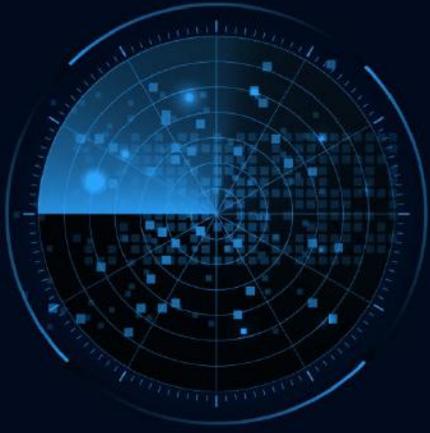
2019

BEST  
PRACTICES  
AWARD

# OMNICOMM

FUELLING YOUR BUSINESS

2019 RUSSIAN & CIS CONNECTED TRUCK TELEMATICS  
GROWTH, INNOVATION & LEADERSHIP FROST RADAR AWARD



# FROST RADAR

## CONGRATULATIONS!

Frost & Sullivan is proud to present Omnicomm with this year's Frost Radar Best Practices Award for Growth, Innovation & Leadership (GIL) in the Connected Trucks Telematics Market in Russia & CIS.

Frost & Sullivan's global team of analysts and consultants continuously research a wide range of markets across multiple sectors and geographies. As part of this ongoing research, we identify companies that consistently develop new growth strategies based on a visionary understanding of the future, and thus more effectively address new challenges and opportunities. This involves extensive primary and secondary research across the entire value chain of specific products. Against the backdrop of this research, Frost & Sullivan recognizes Omnicomm for these valuable achievements.

This recognition is strictly reserved for companies that are market leaders and are at the forefront of innovation. These companies consolidate or grow their leadership position by continuously innovating and creating new products and solutions that serve ever-evolving customer needs. These companies are also best positioned to expand the market by strategically broadening their product portfolio. Achieving Growth, Innovation & Leadership (GIL) is never an easy task, but it is one made even more difficult considering today's intensely competitive environment, customer volatility, economic uncertainty, and rapid technology evolution. Within this context, Omnicomm's receipt of this Award signifies an even greater accomplishment.

Moreover, this recognition is the result of many individuals (employees, customers, and investors) making daily choices to support the organization and meaningfully contribute to its future. Frost & Sullivan enthusiastically acknowledges and celebrates these achievements. Once again, congratulations on your accomplishments and we wish you great success in the future.

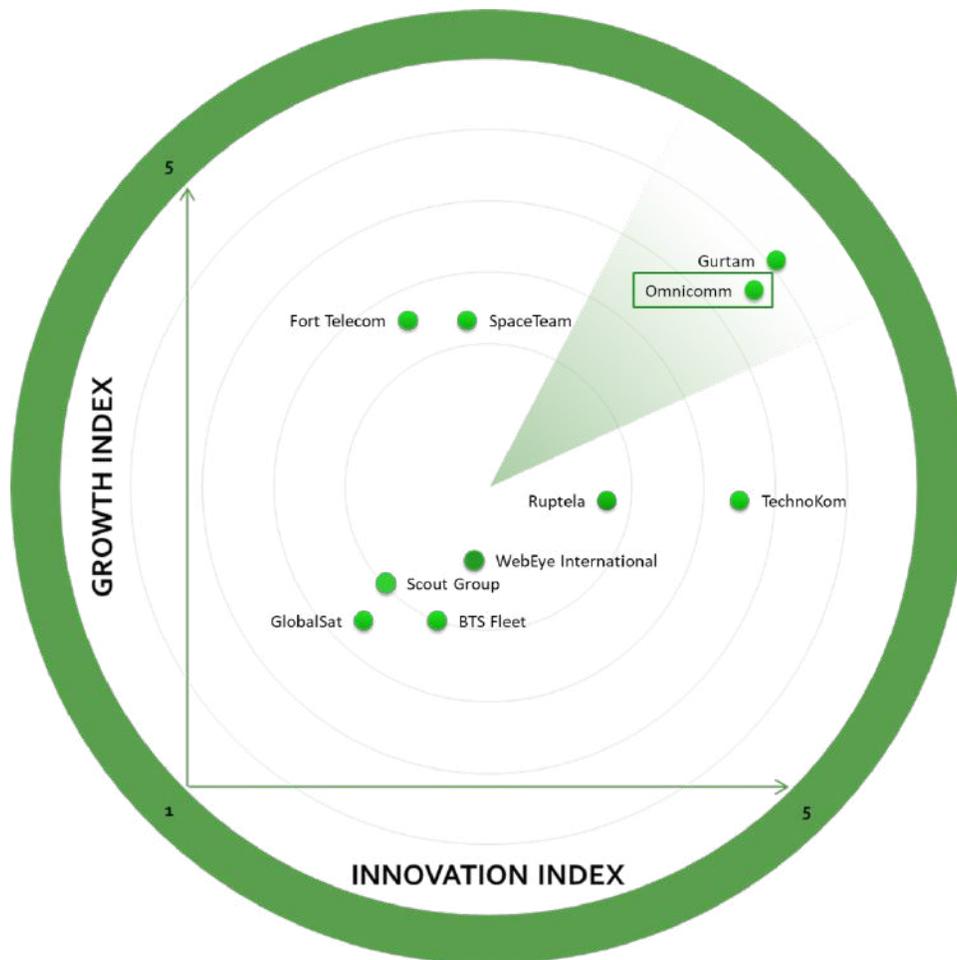
Sincerely yours,

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## The Frost Radar

### Connected Trucks Telematics Market in Russia & CIS



Source: Frost & Sullivan

In a field of +100 global industry participants, Frost & Sullivan has independently ranked the top 10 companies in the above Frost Radar analysis.

The key parameters independently analyzed by Frost & Sullivan include:

- Innovation Scalability
- R&D
- Product Portfolio
- Mega Trends Leverage
- Customer Alignment
- Growth Pipeline
- Vision and Strategy
- Sales and Marketing

Frost & Sullivan studies related to this independent analysis:

- Connected Trucks Telematics Market in Russia and CIS, Forecast to 2020

## Industry Overview

The connected vehicle market is fast paced and extremely competitive. Evolving technologies and varying customer needs make the commercial truck telematics market a difficult space for telematics service providers. Customer expectations, technological advancements, and dynamic regulatory environments are compelling telematics service providers to deliver sustainable telematics solutions. The connected truck telematics market in Russia and CIS countries entails a unique set of challenges and opportunities. Just as the telematics scenario is different in different regions, the Russian and CIS markets are presented with indigenous problems and challenges specific to their own regions.

The Russian and CIS markets are faced with challenges at every turn and fleet owners and managers face certain unmet needs. In most cases, even the most sophisticated fleet management systems available in the market fall short in addressing them. Vehicle and fuel theft lurks as the biggest concern for fleet operators in the region, followed by driver shortage; lack of efficiency and transparency in daily fleet operations; and excessive overhead due to improper planning, routing, and scheduling. Information overload, fleet data integration into existing software systems, and ensuring complete asset utilization are areas that also require attention. The ability to integrate and optimize a range of fleet operations, the flexibility to customize solutions as and when required, and the potential to monetize best practices with the fleet structure and to draw ROI from telematics solutions is the winning combination for a telematics service provider to excel in this tough and rewarding Russian and CIS market.

## Frost Radar Growth, Innovation & Leadership Award Omnicom

### COMPANY DIAGNOSTIC

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Omnicom has been a pioneer in fleet and fuel management solutions for more than two decades. Its products and services are used in 110 countries across different industry verticals. Omnicomm is a clear contestant for market leadership in the Russia and CIS market with manufacturing facilities and support offices located in Russia, Europe, India, Mexico, and Brazil. Omnicomm's cloud based feature-rich fleet management platform Omnicomm Online with an open API that facilitates integration with TMS, ERP, IoT and SDP offers total visibility and control over vehicle fleets while providing up-to-date performance information.

### FROST RADAR POSITIONING

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- Omnicomm is well positioned as a clear leader on both the Growth and Innovation indices. By providing a combination of high-end fuel sensors, hardware terminals, a highly scalable and robust platform, and a wide network of service partners, Omnicomm has firmly rooted its position in the market.

- The company invests in research and innovation and periodically launches new products and solutions; thereby, consistently updating and upgrading its technology expertise. Omnicomm's cloud platform, along with its aggressive market expansion, will help the company retain market its dominance.

## COMPANY STRENGTHS

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- The company possesses a vast and diverse product portfolio, including Omnicomm high-precision LLS fuel-level sensors, vehicle trackers (terminals), driver displays, and fleet management service Omnicomm Online.
- Omnicomm's unique fuel-data processing and adaptation algorithms ensure that fuel-level data recordings are exceptionally accurate at 99.5%.
- Key solutions include fleet management platform, onboard terminals, fuel-level sensors, video monitoring and driver behavior management systems.
- Omnicomm's 100% channel-oriented sales approach delivers to customers via an extensive dealer network and system integration partners.

## COMPANY OPPORTUNITIES

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- Omnicomm's pioneership in the field of fuel sensors presents the company with a unique opportunity in the Russian and CIS markets because fuel theft is a significant problem in the region.
- The total telematics penetration in commercial vehicles (LCV,M/HCV) in Russia is 17.1% and of the total installed vehicles, fuel level sensor penetration rate is about 70%. This presents Omnicomm with the opportunity to further increase its market share.
- Omnicomm recently announced the launch of two additions to its fuel level sensor line, OMNICOMM LLS 5 and OMNICOMM LLS-Ex 5 (explosion-proof version), with unprecedented fuel measurement accuracy of 99.5% in all conditions. The development of these products offers a huge opportunity for market expansion.

## What is the Frost Radar?

### A Practical, High Impact, Scalable C2A (Companies to Action) Tracking Solution

## WHAT IS IT?

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A robust analytical tool that benchmarks companies' innovation focus and growth performance in a given market.

## HOW IS IT BUILT?

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Through in-depth analysis built on our 360-degree research methodology (primary and secondary research) and objective rating of companies in any given market.

## WHY DO WE NEED IT?

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To understand how companies benchmark against each other in their ability to innovate and grow against a backdrop of industry transformation and evolution.

## WHAT WILL IT ACCOMPLISH?

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Enable companies to gain an objective, independent perspective of their innovation and growth strategies, including their robustness, effectiveness, relative competitive strength, and implications on their long-term success.

## HOW TO USE IT?

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Frost Radar is a dynamic tracking tool that offers frequent rating and positioning of companies that are leading the industry on growth, innovation or both. Due to changes in operating environment and internal changes within these organizations, their positioning in Frost Radar will change over time. It is important to leverage Frost Radar to ensure that companies are aware of changes to their ecosystem and their relative positions to it.

## WHAT DOES IT MEAN TO BE ON THE FROST RADAR?

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Every company that finds itself on the Radar has been chosen because they have proven themselves to be worthy by demonstrating excellence in either growth, innovation, or both, and are able to translate that into proven solutions that benefit their clients. At times, companies with high market share may not place on the Radar. Companies are chosen because they are already doing great things, or because they are poised to do great things.

## Frost Radar → C2A

All companies on the Frost Radar could be C2A. Best Practice recipients are the companies that Frost & Sullivan considers the **Companies to Act On Now**.

## GROWTH EXCELLENCE AWARD

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The Growth Excellence best practice award is bestowed on companies that are achieving high growth in an intensely competitive industry. This includes emerging companies making great strides in market penetration or seasoned incumbents holding on to their perch at the pinnacle of the industry.

## INNOVATION EXCELLENCE AWARD

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The Innovation Excellence best practice award is bestowed on companies that are industry leaders reinventing themselves through R&D investments and innovation. These may be companies that are entering a new market and contend for leadership through heavy investment in R&D and innovation.

## GROWTH, INNOVATION & LEADERSHIP AWARD

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The Growth Innovation Leadership (GIL) best practice award is bestowed on companies that are market leaders that are at the forefront of innovation. These companies consolidate or grow their leadership position by continuously innovating and creating new products and solutions that serve the evolving needs of the customer base. These companies are also best positioned to expand the market by strategically broadening their product portfolio.

## Frost Radar

### 2 Major Indices, 10 Analytical Ingredients, 1 Platform

#### VERTICAL AXIS – THE GROWTH INDEX

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Growth index is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market-, competitor-, and end-user focused sales and marketing strategies.

- **GI1: Market Share (previous 3 years):** Market share relative to its competitors in a given market space for the previous three years.
- **GI2: Revenue Growth (previous 3 years):** Revenue growth rate for the previous three years in the market/ industry/category that forms context for the given Frost Radar.
- **GI3: Growth Pipeline:** This is an evaluation of the strength and leverage of the company's growth pipeline system, to continuously capture, analyze and prioritize its universe of growth opportunities.
- **GI4: Vision and Strategy:** This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments the company is making in new products and markets consistent with the stated vision?
- **GI5: Sales and Marketing:** This is a measure of the effectiveness of a company's sales and marketing efforts in helping the company drive demand and achieve its growth objectives.

## HORIZONTAL AXIS – THE INNOVATION INDEX

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Innovation index is a measure of a company's ability to innovate products/services/solutions that are developed with a clear understanding of disruptive Mega Trends, are globally applicable, are able to evolve and expand to serve multiple markets, and are aligned to customers' changing needs. Key elements of this index include:

- **II1: Innovation Scalability:** This determines whether the organization's innovation(s) is/are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.
- **II2: Research and Development:** This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.
- **II3: Product Portfolio:** This is a measure of the product portfolio of the company, focusing on the relative contribution of new products to its annual revenues.
- **II4: Mega Trends Leverage:** This is an assessment of a company's proactive leverage of evolving long-term opportunities and new business models, as the foundation of its innovation pipeline.
- **II5: Customer Alignment:** This evaluates the applicability of a company's products/ services/ solutions to current and potential customers (7-year horizon), as well as how its innovation strategy is influenced by evolving customer needs.