didcom®

2025 CUSTOMER VALUE LEADER

Maximizing the Price/Performance ROI for Customers

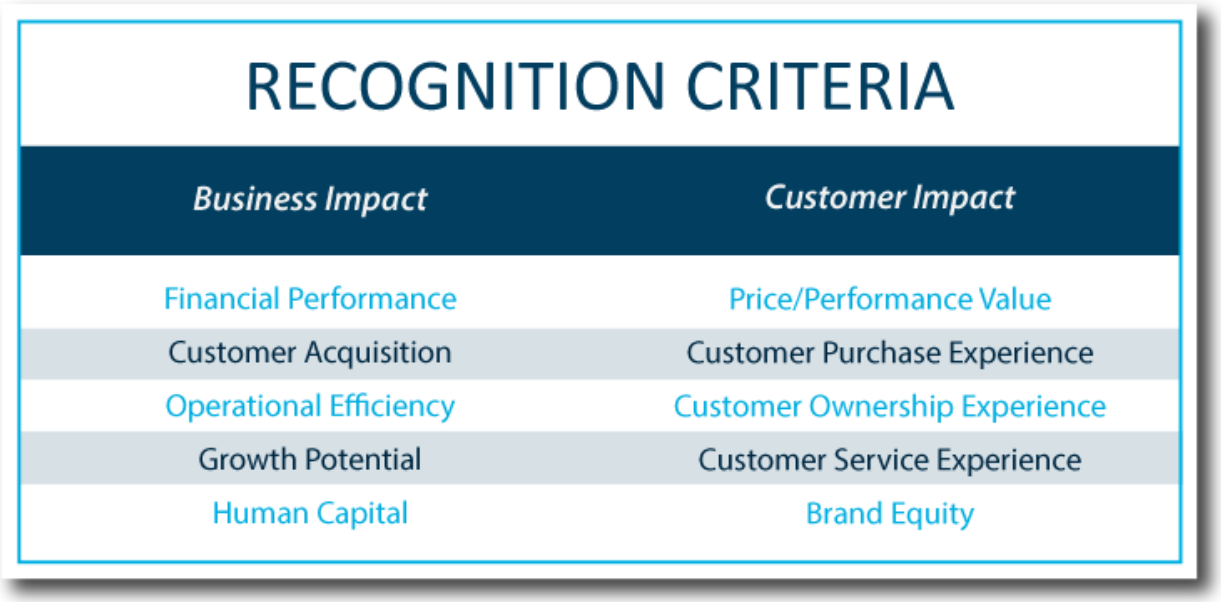
RECOGNIZED FOR BEST PRACTICES IN THE MEXICAN INTELLIGENT MOBILITY & CONNECTED TRUCK TELEMATICS INDUSTRY

FROST & SULLIVAN

Table of Contents

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Didcom excels in many of the criteria in the Mexican connected truck telematics space.



RECOGNITION CRITERIA

Business Impact	*Customer Impact*
Financial Performance	Price/Performance Value
Customer Acquisition	Customer Purchase Experience
Operational Efficiency	Customer Ownership Experience
Growth Potential	Customer Service Experience
Human Capital	Brand Equity

The Transformation of the Mexican Intelligent Mobility & Connected Truck Telematics Industry

Mexico's commercial vehicle landscape faces fragmented fleets, tight margins, and rising security risks. Small operators and owner-drivers—who make up over half the market—remain highly price-sensitive and cautious about adopting new technologies. Many drivers distrust telematics data, and fleet managers often struggle to interpret AI-generated insights, limiting the value of these tools. At the same time, global supply chain shifts and rising US tariffs on imported hardware are driving telematics prices upward.

Demand for factory-installed telematics continues to grow, but renewal rates drop sharply after the initial subscription. Small fleets often require stronger onboarding and ongoing support to build trust in the data. These challenges make the market dependent on providers that understand local constraints and offer integrated, scalable, competitively priced solutions that are easy to use.

Didcom, founded in Hermosillo, Sonora, is a high-technology company with more than 17 years of engineering experience in mobility, telematics, and embedded systems. By designing, developing, and refining its solutions locally, Didcom maintains a precise understanding of fleet operations, cost pressures, and the day-to-day complexities of transportation in Mexico.

Its Technology Core integrates hardware, firmware, software, data architecture, and operational intelligence into a unified ecosystem, enabling solutions that adapt to diverse operational environments without losing technical depth. This combination of **OEM-embedded connectivity, aftermarket**

versatility, and engineering-driven integration allows Didcom to address Mexico's most persistent fleet management challenges with precision, scalability, and measurable operational impact.

Customer Acquisition

> *"Beyond OEMs, Didcom has built a strong ecosystem of technology partnerships that elevate its AI-powered analytics, Edge Intelligence, and real-time data capabilities. These collaborations amplify the company's ability to deliver tailored solutions that address the specific operational demands of modern fleets—improving efficiency, strengthening safety, and helping operators adapt to increasingly intelligent and electrified mobility environments."*
>
> ***- Benson Augustine,***
> ***Program Manager, Aftermarket & Digital Retail***

Didcom's customer acquisition model thrives on long-standing partnerships, strong engineering alignment with OEMs, and the ability to deploy scalable solutions that adapt to evolving fleet needs. The company's embedded approach, leveraging its Technology Core (comprising AI-Edge Intelligence, Data Architecture, and Connectivity Layers), enables advanced telematics integration directly at the OEM level, ensuring real-time data access and operational continuity.

This capability has been validated through specialized integration projects with leading manufacturers such as **MAN and Volkswagen Truck & Bus México**, where Didcom demonstrates its operational strength by equipping **more than 1,000 vehicles annually**, consolidating its position as a trusted technology partner for OEMs and large fleets.

Beyond OEMs, Didcom has built a strong ecosystem of technology partnerships that elevate its AI-powered analytics, Edge Intelligence, and real-time data capabilities. These collaborations amplify the company's ability to deliver tailored solutions that address the specific operational demands of modern fleets—improving efficiency, strengthening safety, and helping operators adapt to increasingly intelligent and electrified mobility environments.

Complementing these partnerships, Didcom leverages its proprietary engineering foundation to deploy integrated telematics and IoT architectures that align with each fleet's real-world operational context. A key enabler within this ecosystem is its **Bluetooth Low Energy Gateway (BLEG)**, a proprietary Edge component that consolidates wireless sensor data—such as temperature, tire performance, load status, and asset visibility—into a unified data stream within the platform.

Rather than functioning as an isolated device, BLEG operates as part of a broader **Didcom Technology Core**, where AI-edge processing, data normalization, and secure connectivity come together to provide real-time operational insights. This architecture allows fleets to scale their capabilities progressively, integrating advanced monitoring, predictive analytics, and safety-critical alerts as their operational maturity evolves.

Through this combined approach—ecosystem partnerships, proprietary engineering, and a modular sensor-to-cloud architecture—Didcom delivers a comprehensive platform that strengthens operational efficiency, enhances safety outcomes, and sustains fleet performance across diverse mobility scenarios.

Today, more than 50,000 vehicles use Didcom solutions. Its ability to onboard large fleets quickly while customizing solutions to each operator strengthens customer retention.

Price/Performance Value

Didcom's pricing strategy emphasizes long-term economic value. Didcom's value proposition is anchored in engineering specialization and a technology architecture designed to deliver measurable economic impact. Its pricing strategy reflects a long-term view of operational value, enabling fleets and manufacturers to reduce costs through fuel and energy optimization, predictive maintenance, and intelligent operational decisioning. These capabilities accelerate ROI in an increasingly cost-conscious and electrification-focused mobility landscape.

Rather than offering isolated telematics modules, Didcom differentiates itself through a unified **Technology Core** composed of functional layers—**Core Systems, Data Architecture, AI-Edge Intelligence, Vision & Perception, Connectivity, Security, and Ecosystem Integration**. This modular architecture allows Didcom to seamlessly support both traditional internal combustion fleets and the rapidly growing electric vehicle (EV) segment, where OEMs and operators require deeper visibility into energy management, component health, and real-time operational efficiency.

For OEMs and large fleet operators, Didcom's embedded approach enhances the vehicle from the factory stage by enabling more accurate operational data, tighter integration with vehicle control systems, faster commissioning, and seamless alignment with emerging software-defined vehicle (SDV) strategies. These efficiencies reduce lifecycle costs and allow manufacturers to offer higher-value connected services without the fragmentation or limitations of aftermarket installations.

Didcom's platform consolidates real-time operational data—including component health, energy usage, system alerts, driver and route behavior, safety signals, and environmental conditions—into a single intelligence-ready environment. This empowers fleets to move from manual oversight to **predictive, automated, and AI-assisted operational management**, reducing downtime, improving safety, and strengthening compliance.

Sensor technologies and real-time data analysis further strengthen Didcom's integrated ecosystem. Solutions such as advanced temperature monitoring, remote actuator control, and fuel-level analytics provide a holistic view of fleet performance while enabling proactive decisions based on **edge computing** and **AI-powered insights**. These capabilities deliver a measurable impact on cost efficiency, safety compliance, and operational continuity across mobility operations, whether in traditional, hybrid, or fully electric fleets.

Customer Ownership Experience

Didcom's customer ownership experience is built on reliability, continuity, and operational trust. Beyond delivering advanced technology, the company ensures that fleets experience a smooth transition from deployment to day-to-day operation through a service model that emphasizes stability, responsiveness, and long-term value realization.

> *"For large fleets and manufacturers, Didcom offers dedicated engagement models that include account-level technical oversight, operational reporting, and integration management. These programs provide deeper visibility into fleet behavior, ensuring that decision-makers receive clear, actionable insight on performance improvements, cost-saving opportunities, and long-term optimization strategies."*
>
> ***- Benson Augustine, Program Manager, Aftermarket & Digital Retail***

From onboarding onwards, Didcom focuses on minimizing operational friction. Deployments are standardized, predictable, and coordinated to avoid disruption, while user enablement programs help operators, supervisors, and technicians fully adopt the platform from the first day. This structured approach allows organizations to activate new capabilities quickly and build confidence in the system without the typical complexities associated with fleet technology adoption.

Throughout the vehicle life cycle, Didcom provides continuous support that reinforces uptime and operational continuity. Proactive monitoring, accessible assistance channels, and periodic performance reviews ensure that customers consistently extract value from the platform and adapt its use as their operation evolves. Rather than relying solely on corrective support, Didcom emphasizes preventative guidance—helping customers anticipate issues, refine workflows, and align technology with operational goals.

For large fleets and manufacturers, Didcom offers dedicated engagement models that include account-level technical oversight, operational reporting, and integration management. These programs provide deeper visibility into fleet behavior, ensuring that decision-makers receive clear, actionable insight on performance improvements, cost-saving opportunities, and long-term optimization strategies.

The result is an ownership experience centered not only on the strength of Didcom's technology but on the confidence, predictability, and operational clarity that customers gain over time—making Didcom a long-term partner rather than a transactional provider.

Brand Equity

Didcom's brand strength is rooted in its identity as a Mexican technology company delivering globally competitive engineering. Its 2025 **Hecho en México** certification recognizes world-class design, manufacturing quality, and technological innovation—positioning the company within Mexico's strategic movement toward smart mobility and advanced manufacturing.

With deployments in **more than 20 countries**, Didcom has demonstrated its ability to operate in diverse and demanding environments. Its work with major operators—**including Mobility ADO, a global mobility company founded in Mexico with operations across two continents, more than 500 million passengers per year, 744 million kilometers traveled daily, and a fleet of over 10,000 vehicles**—reinforces its capacity to support large-scale, mission-critical mobility operations.

Didcom's recognition as one of **Mexico's top workplaces (2024)** reflects a strong engineering culture that translates into higher service quality, customer trust, and long-term brand loyalty.

Through global validation, engineering excellence, and a high-performance culture, Didcom has established a solid and credible brand presence in the intelligent mobility ecosystem.

Growth Potential

Mexico's connected mobility and fleet telematics market is entering a phase of accelerated expansion. With more than 1.31 million connected trucks projected for 2024, adoption is being driven by the urgent need to reduce operating costs, enhance safety, and increase overall efficiency in increasingly competitive logistics and transportation environments. Rising cargo theft and security risks are reinforcing demand for intelligent protective technologies, including anti-jamming, access monitoring, and remote vehicle-control capabilities.

AI-powered video intelligence is becoming a core component of modern fleet safety strategies. Operators are rapidly adopting solutions that provide risk detection, fatigue monitoring, and driver coaching, recognizing their measurable impact on accident prevention, insurance reduction, and operational continuity. At the same time, fuel and energy management remain top priorities—areas where Didcom's integrated architecture and real-time decisioning capabilities create a distinct competitive advantage for both combustion and electrified fleets.

Market dynamics are also shifting toward open and interoperable ecosystems, where multiple service providers can coexist on standardized hardware and data architectures. This transformation favors companies with deep engineering specialization, strong OEM enablement, and the ability to support advanced capabilities such as AI at the edge, EV intelligence, and unified data governance.

With its proprietary Technology Core, OEM-aligned integration expertise, and expanding ecosystem capabilities, Didcom is strategically positioned to lead this next stage of industry evolution—capturing domestic growth while continuing to scale across international markets.

Conclusion

Didcom has demonstrated a clear ability to deliver measurable value in a market undergoing rapid technological and operational transformation. Through its OEM-aligned integration, unified Technology Core, and expanding ecosystem of intelligent solutions, the company consistently enables fleets to operate with greater efficiency, safety, and reliability.

Its capacity to translate engineering depth into practical, scalable outcomes positions Didcom as a trusted partner for fleets and manufacturers seeking to modernize their operations and prepare for the shift toward more connected, electrified, and data-driven mobility models.

Strengthened by a respected national brand, global export reach, and a growing installed base, Didcom is well-positioned to sustain its momentum and capture continued growth across Mexico and international markets.

For its strong overall performance and commitment to customer value, Didcom is recognized with Frost & Sullivan's 2025 Mexican Customer Value Leadership Award in the connected truck telematics industry.

What You Need to Know about the Customer Value Leadership Recognition

Frost & Sullivan's Customer Value Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Customer Value Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fuelled by the Innovation Generator™.

Learn more.

Key Impacts:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)