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546 - Connected Services Guide – LCVs

While the use of connected car services is widespread among passenger vehicles, with many OEMs having launched their services in at least one market, the Light Commercial Vehicle (LCV) segment is still in the early stages of maturity.

This report provides key, up-to-date, insights into the connected services available for LCVs.



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Fleet Management Solutions: Automotive & LCV Value Chains

In the past few years, a number of automotive OEMs have sought to take a portion of the fleet management solutions (FMS) market for themselves. These automakers are ultimately looking to leverage the market’s solutions to enhance operations, often through boosted factory connectivity. While the trend initially began with select manufacturers of heavy vehicles, there is now a pioneering wave of Light Commercial Vehicle (LCV) players and other manufacturers addressing the FMS market - seeking to take a share of the increasing service revenues funded by fleet managers.

Our Fleet Management Solutions: Automotive & LCV Value Chains report identifies the key opportunities and challenges facing OEMs wishing to participate in the FMS value chain. It further helps them gain a clear understanding of the strategies needed to incorporate FMS and their associated services, while outlining the products, services, and business models already being pursued by stakeholders. Planning, marketing, and IT teams benefit further from detailed analysis of key fleet management service strategies organized by OEM.

COVERAGE



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Key questions answered

- > How are OEMs and suppliers more broadly incorporating the FMS into their broader corporate strategies?
- > What considerations need to be taken when looking for partnerships?
- > What types of products, services, and business models are stakeholders pursuing as an outcome of their higher focus into FMS?

This research supports



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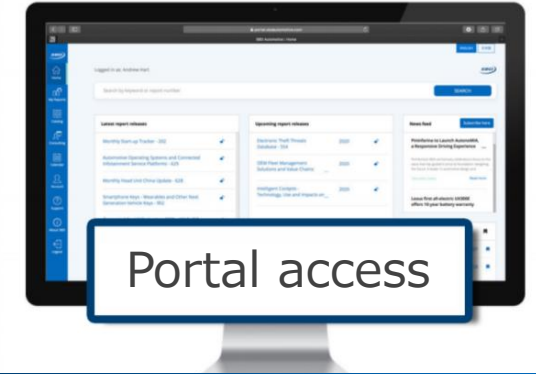
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September 2023
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Introduction



Introduction

This 2023 report is an update to the original 'Fleet Management Solutions for OEMs' report that was published in 2020. This update includes a refresh of the OEM and aftermarket products covered in the original report, new electric vehicle use cases and updates to passenger vehicle leasing.

The operational benefits and potential return on investment for fleet managers implementing telematics-based fleet management are well documented in the aftermarket.

The relatively low barrier to entry for new Fleet Management Solutions (FMS) companies to come to market has attracted many software as a service (SaaS) companies to the market. Companies offering SaaS account for >90% of all FMS business.

In recent years, automotive OEMs have sought to take some of this market for themselves, based on factory connectivity. This trend began with makers of heavy vehicles but now there is a pioneering wave of light commercial vehicle and car makers entering the FMS market, seeking to take a share of the increasing service revenues funded by fleet managers.

This report looks at the opportunities and challenges facing OEMs wishing to participate in the FMS value chain.

What are the key questions answered in this report?

- Use cases – How to leverage fleet management solutions to create new value for B2B customers?
- Value chain – What is the value chain for fleet management solutions and what will be the role of OEMs?
- Passenger and LCVs – What are the differences and similarities between fleet management solutions for passenger cars and LCVs?
- Partnerships – What considerations need to be taken when looking for partnerships?
- OEM Products – Overview of OEM products in market (EU and US)
- What EV-Specific features will come next for FMS products?

Section	Content
Executive Summary	Key questions answered in this report and chapter overviews
FMS – Use Cases	Use cases that support the management of jobs and drivers
Data Availability	Insights into the availability of data and consent processes
Electric Vehicle Use Cases	Insights and reports that can be produced using raw data
OEM API Deep Dive	A closer look at the Application Program Interfaces offered by OEMs
FMS – Needs by Sector	Closer look at each sector of fleet management and the associated needs
Scenarios for OEMs	Decisions for OEMs to make and the relationships that should be created
Partner Selection Considerations	Important factors to consider when selecting a partner
OEM Activities in FMS	Comparison of OEM activities in the fleet management sector
Aftermarket FMS Supplier Profiles	Profiles of individual aftermarket suppliers
FMS Value Chain	Insights into the fleet management value chain
Next Steps	What steps to take next in OEM Fleet Management Solutions and Value Chains

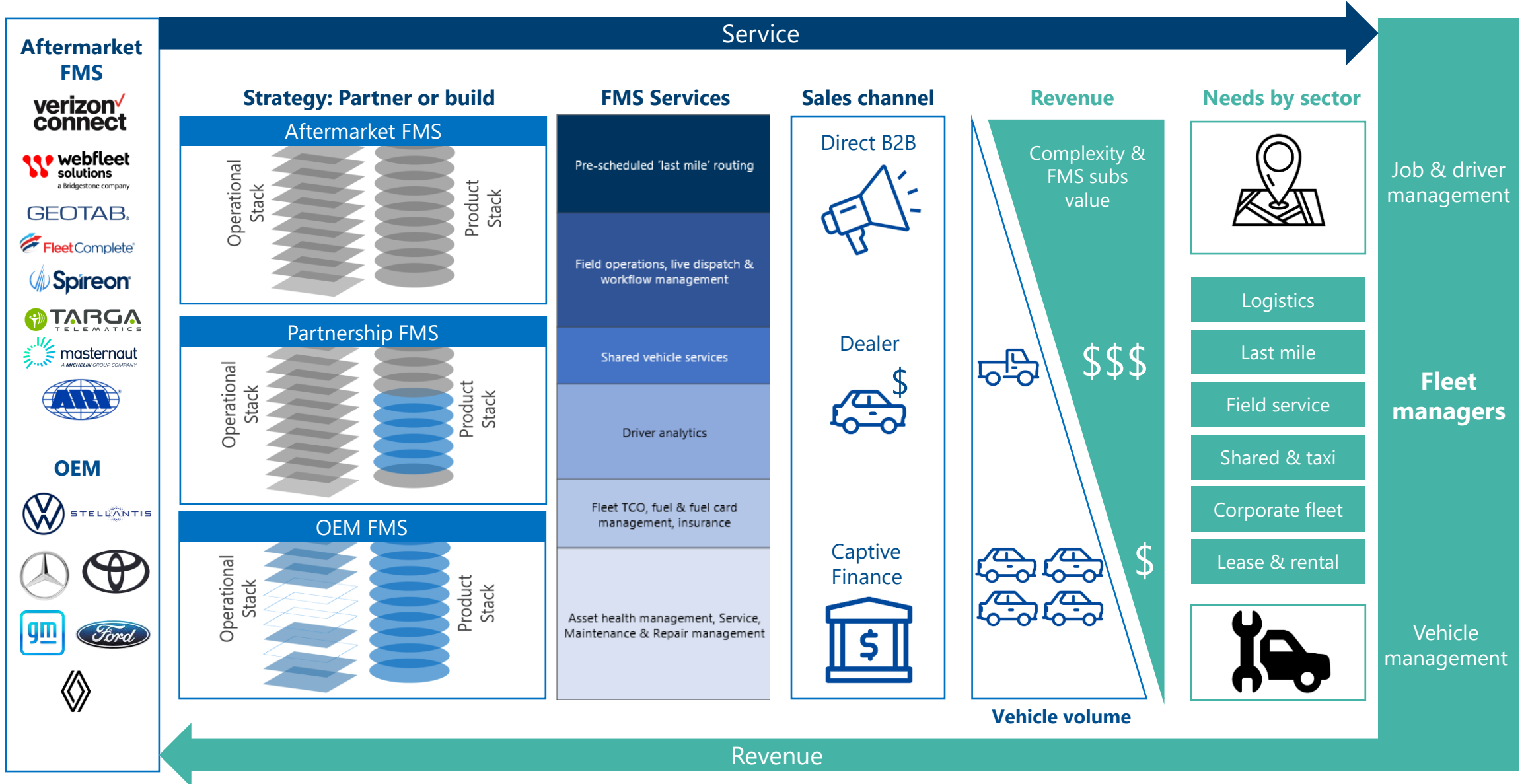


Example slides from the report



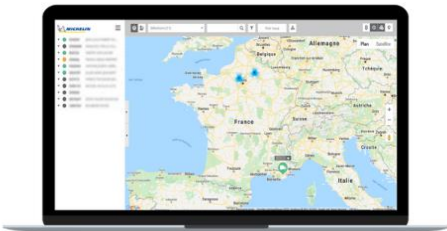
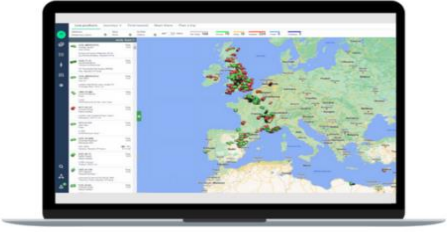
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For OEMs, the FMS value chain can be complex but profitable



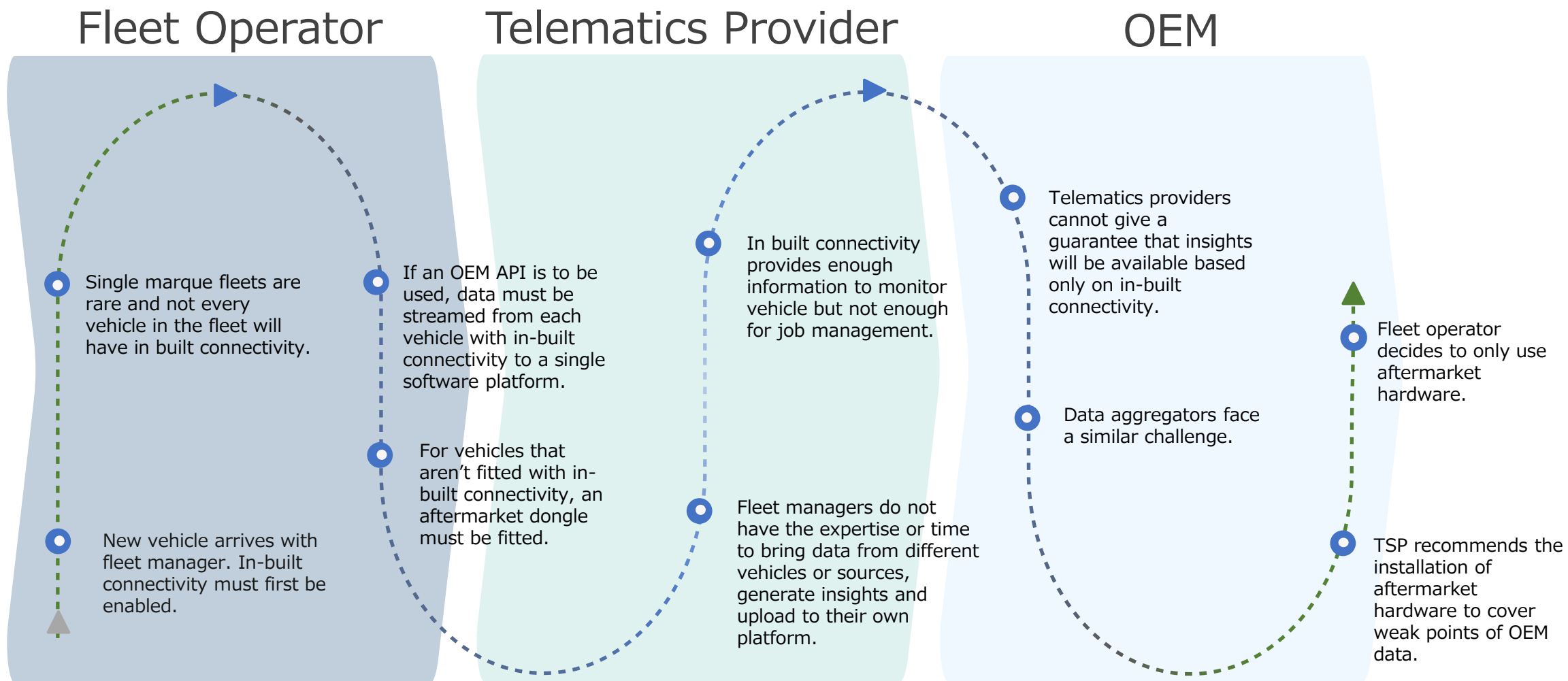


FMS categories: Driver & Job Management

Service Category	What's the value proposition?	Market maturity?	How many solution providers?
Pre-scheduled 'last mile' routing	<p>This is where the highest volume of fleet management services currently lay.</p> <p>Fleet managers or dispatchers can see live and accumulated data about their fleet and use dashboards and reports to pinpoint inefficiencies in operations.</p>	<p>2020</p> <p>Concept -----> Mature</p> <p>↓</p>	<p>2020</p> <p>Niche -----> Crowded</p> <p>↓</p>
Enterprise operations, live dispatch & workflow management	<p>Typical return on investment comes from fuel savings from better route management and reduction in vehicle idle time, detours and non-optimal activity.</p>	<p>2023</p> <p>Concept -----> Mature</p> <p>↓</p>	<p>2023</p> <p>Concept -----> Mature</p> <p>↓</p>
Shared vehicle services	<p>Live vehicle positions can be sub-divided by vehicle type, capability and shift pattern. Dispatchers can find the closest vehicle to a job and get estimate time of arrivals.</p>	<p>Example of marketing: (Masternaut/Michelin)</p>	
Driver analytics	<p>Driver's activities such as first ignition-on and last ignition-off, as well as breaks can be used to automate timesheets.</p>		<ol style="list-style-type: none"> 1 See vehicle and driver location on the map 2 Flip between map and tabular real time views 3 Corridoring - set routes and alerts when the driver deviates from a given route 4 Find the nearest vehicle, plan route directions and email to drivers 5 Activity visibility with idling and stop hours per driver
Fleet TCO, fuel & fuel card management, insurance	<p>As well as the live portal, it is common to provide customisable analytics and reports so that fleet managers can see vehicle utilisation data that's most important to their business.</p>	<ol style="list-style-type: none"> 6 Create routes and overlay routes and POI on the map 7 Tacho hours: set up infringement alerts, get real-time and historical visibility on the tacho hours, activities, infringements 8 View real-time fuel levels per vehicle 9 Geofencing - set up zones and alerts of entry and exit of pre-defined geographical boundaries 10 Filter by group, activity, EV state and custom tags and view up to 10,000 vehicles on one screen 	
Asset health management, Service, Maintenance & Repair management	<p>These services are commonly supplemented with a driver app for 2-way dispatch comms.</p>		



Phase 1. Make more data available in the API.





Emissions KPI for ICE fleets. Useful for compliance checks.

Showing emissions KPIs helps to reduce carbon footprint, cut operating costs and ensure regulatory compliance.



Data required

Core requirements:	<ul style="list-style-type: none"> • Vehicle identification number • Miles per gallon • Idling time • Odometer
Advanced requirements:	<ul style="list-style-type: none"> • Diesel emissions fluid usage (for compliance) • Coasting and acceleration • Torque measurements

Goals

Example of leading solution:	Samsara
Current features:	Fuel consumption & emissions per mile. Emissions per delivery.
Areas for improvement:	Telematics to monitor vehicle performance and identify areas for improvement

Who benefits?

- Governments are interested in reducing real world emissions and have put targets in place. From the fleet managers perspective, the benefits of setting emission KPIs are therefore broad.
- Lease companies need to meet emissions targets for their lease fleets. Being able to monitor their emissions and then reduce them is a high priority for them. They also want to know where they are saving carbon to get green credits.
- CO₂ emissions are directly related to fuel consumption. Fleet managers are prioritizing efficiency savings, and this can be done through setting targets and identifying good behavior.

Maturity

- This is a mature sector that is well understood. Governments have set targets for emissions reductions. Fleet managers also want to improve efficiency by setting emissions targets.
- The most mature systems can give live fuel consumption readings and historical data to show if emissions targets can be met.
- On-board monitoring and KPIs could be used to identify a vehicle that is non-compliant.
- Emissions monitoring and KPIs could be a way of identifying if aftertreatment systems have been tampered with to reduce costs.





FMS needs analysis: By industry vertical

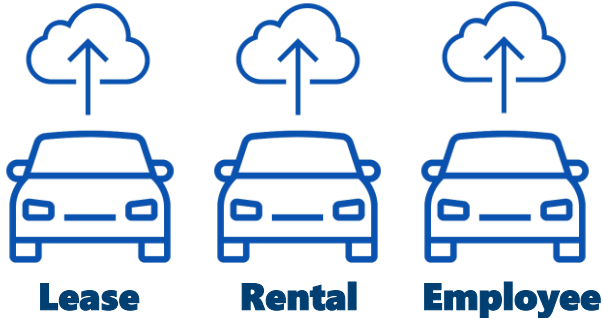
Established need	Vehicle usage vertical	Leased	Rental				Taxi		Car pooling		Local service (enterprise)			Public sector, health & utility		Courier & postal			
	Sub-vertical	Leased corporate fleet	Fixed, staffed depot	Closed loop self-service	Floating/zoned self-service	P2P short term rentals	Centrally coordinated taxi (company's car)	Brokered/ride-hailing (driver's car)	Open, publicly brokered	Corporate car pooling	Centrally dispatched SME	Centrally dispatched large enterprise	Non-dispatched	Utilities	First responder & field health workers	Parcel services	Express delivery (Company vehicle)	Courier services including food delivery (driver's vehicle)	Postal services
Emerging need	Description / Example	Company car schemes for employees	Traditional rental at airport	Enterprise Carshare	Zipcar	Getaround	Traditional taxi sector	Uber	Uber Pool	Split	Emergency plumbing services	Dynorod	Construction company	Electricity, water, cable field services	Blue light and field worker	Multi-leg with warehousing	DHL	A to B delivery, JustEat	US Postal Service
No need																			
Pre-scheduled 'last mile' routing	Automated daily job dispatch scheduling with live management																		
	Customer ETA notification and live tracking links																		
Field operations, live dispatch & workflow management	On-the fly job dispatch to drivers																		
	Dynamic Geo-Zones Alerts																		
	Tracking																		
	Real Time Geolocation																		
Shared vehicle services	Time Stamped Monitoring																		
	Reporting Base (position, usage, fuel)																		
	Driver access management																		
Driver analytics	Billing & invoicing																		
	Bookings & reservations																		
	Total Engine Run Time																		
	Acceleration History																		
Fleet TCO, fuel & fuel card management, insurance	Driving Events																		
	ECO driving score																		
	Average Speed Per Trip																		
Asset health management, Service, Maintenance & Repair management	Reporting Base (crash, fines)																		
	Fuel Consumption																		
	Fuel Level																		
	Vehicle status, position, diagnostic																		
	Technical Alarms																		
	Tire Pressure																		
	Engine oil level																		
Maintenance Alerts																			
Maintenance Scheduling																			
Distance to Next Service																			
Odometer Value																			



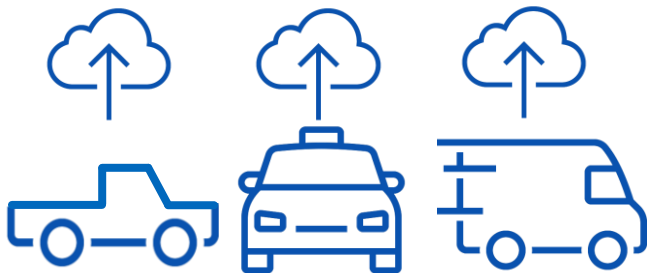
What types of fleet manager are using your vehicles in their business?



Passenger car



LCV

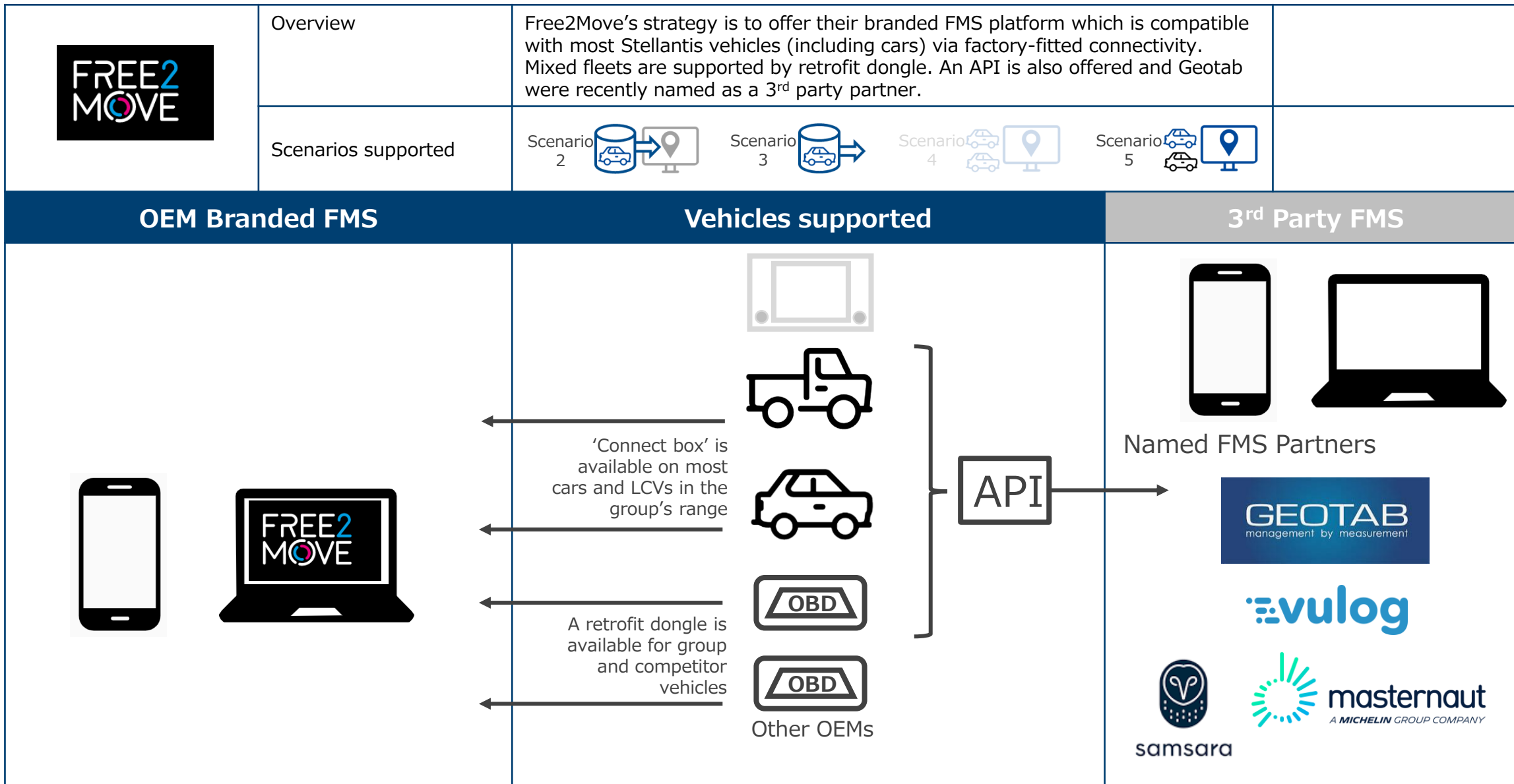


Which fleet managers are using your vehicles?

- Can you identify key sectors which are using your vehicles?
- Are you dominating the company car sector or lease/rental in a particular region?
- Is your LCV fleet particularly successful in a particular sector?
- Data from your captive finance company or partner lease companies can be useful in determining which fleet managers are using your vehicles in their businesses.
- What's the stacked ranking of business sectors using your vehicles, ranked by volume?



Free2Move – Supporting mixed fleets on their own FMS platform





Scenario1: Aftermarket FMS



This scenario is by far the most common in market today. Aftermarket solutions dominate and are most highly penetrated in the LCV segment. The FMS provider is responsible for all activities in the business value chain as well as the product value chain.

Aftermarket FMS
OEM

Business value chain

- Customer care & retention
- Accounts & invoicing
- Cloud operations
- Provisioning
- Field Support
- Field sales
- Outbound sales
- Marketing
- Product development (custom)
- Product development (core)
- Product planning

Example providers



Product value chain

- Enterprise management portal
- In-vehicle enterprise management
- Asset management portal
- 3rd party integration
- API
- Cloud
- OTA
- Network
- TCU
- Dongle



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