

# Magic Quadrant for Real-Time Transportation Visibility Platforms

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Real-time transportation visibility continues to be a key priority for shippers and 3PLs, and their customers. Supply chain technology leaders can use this research to get an overview of the market, trends and vendors in the real-time transportation visibility platform space.

## Strategic Planning Assumption

By 2023, 50% of global product-centric enterprises will have invested in real-time transportation visibility platforms.

## Market Definition/Description

This Magic Quadrant for Real-Time Transportation Visibility Platforms is the first version of this Magic Quadrant. It replaces the 2020 Market Guide for RTTVP: [Market Guide for Real-Time Transportation Visibility Platforms](#).

## Market Definition

Gartner defines the real-time transportation visibility platform (RTTVP) market as those vendors offering platforms that provide commercial customers and consumers with real-time insights into their orders and shipments once they have left the brand owner's, supplier's or service provider's warehouse. Such platforms, owned and managed by third-party software vendors, represent a part of the end-to-end supply chain visibility market that predominantly – but not solely – addresses the domestic road transportation modes. RTTVPs obtain data through integration (for example, API or EDI) with carrier systems, direct feeds from telematics (for example, in-cab or trailer devices) or other devices (for example, mobile or smartphone).

The core capabilities of RTTVPs include:

- Order capture
- Data cleansing/data compliance
- Basic tracking
- Messaging/alerts

- Predictive estimated time of arrival (ETA)
- Dashboards
- Carrier integration

The extended capabilities of RTTVPs include:

- Risk assessment
- Advanced analytics
- Dynamic appointment scheduling
- Networked visibility
- Collaboration
- Capacity matching
- Transportation planning or execution
- Freight payment
- Telematics/sensor solutions
- eBOL/ePOD document management
- Yard management
- Gate automation
- Route planning

## Market Direction

Commercial customers and consumers continue to have increased demands around real-time visibility to their orders and shipments. This remains valid for any organization, regardless of size, geography or industry. It is applicable across all regions, with North America and Europe leading the adoption. These solutions started out as predominantly focused on domestic road requirements.

An increasing number of end-user companies are investigating or implementing visibility solutions, led by real-time visibility solutions. This is happening for several reasons:

- Most shippers have a large percentage of their freight spend (on average 70%) in over-the-road transportation, mainly full truckload (FTL) and less than truckload (LTL).

- Visibility not only provides benefits internally to the transportation organization, customer service and the warehouse but also benefits the customer who is demanding these types of insights into their shipments. In the past, visibility tools have allowed companies to differentiate in terms of customer service, although this capability is increasingly becoming an expected offering by customers. Not being able to offer this capability, however, can have the opposite effect with the customer.
- Control towers and international visibility, where many modes are connected for a single shipment, can often be very complex and time-consuming to implement. Real-time visibility, however, is much smaller in scope and takes up less resources and time to deploy. Gartner most commonly sees deployments in three to six months for these types of real-time visibility solutions.

## Market Analysis

The real-time transportation visibility market is thriving with several vendors growing at 100% year over year. That being said, even the larger RTTVP vendors are still fairly small. The RTTVP market takes up only a part of the overall transportation technology market, which is still dominated by solutions such as a transportation management system (TMS).

### **As the Market Grows, New Vendors Appear; Some Have a Specific Regional Focus or Specialize in a Specific Mode of Transportation**

As this real-time visibility market continues to grow, new vendors are appearing in the marketplace from other visibility segments and other regions. In Gartner's [Supply Chain Operational Visibility Vendor Guide](#), we have listed over 150 different vendors in the different visibility segments. As the entire global transportation visibility market now has well over 100 different vendors in this solution space, end users have an increasingly tougher time differentiating between vendors and understanding the key points of focus by the vendors.

Gartner has observed how new companies are entering this space and are competing for a portion of the maturing visibility market. However, it is harder for new entrants to compete with the existing leaders as these vendors have a more extensive and varied carrier network providing support to a larger number of customers.

The **criteria** to consider when defining visibility solution needs include:

- Enterprise (plant, factory and warehouse) visibility versus multienterprise (including business partners) visibility
- Asset (truck, trailer and container) tracking versus product tracking
- Shipment (load) tracking versus product (down to box and SKU) tracking
- Real-time tracking (for example, updates every 15 minutes) versus milestone (pick-up, delivery) insights

- Positioning tracking versus conditioning tracking (for example, temperature, humidity, pressure and damage)
- Single transportation mode versus multimode coverage
- Visibility only versus visibility plus advanced capabilities (intelligence)
- Domestic scope versus international or even global scope

## **Vendors' Offerings Are Evolving Through Expansion of Modes Offered, Regional Coverage, Capabilities and Reach**

As the RTTVP market maturity increases, end-user companies are pushing their vendors to extend capabilities, modes offered and regional coverage. Some vendors try to do this organically; others accomplish this through acquisitions and/or partnerships. Most recently, project44 acquired Ocean Insights, a leading provider of international visibility. RTTVP vendors also partner with other visibility providers to extend their offering. Partnerships are created for ocean visibility with vendors such as Marine Traffic to offer domestic and international logistics professionals end-to-end visibility, from global seaports to final destinations worldwide. Trimble and others partner with Railinc for intermodal and rail, as well as with Spire for barge and ocean.

Several companies added appointment scheduling to their core capabilities, allowing shippers and carriers to collaborate efficiently on pickup and receiving location appointments.

Furthermore, FourKites acquired a yard management solution (YMS), which it integrated into its visibility platform to offer Dynamic Yard Management. Project44 went into a partnership with PINC, a leading YMS vendor, to offer an integrated YMS solution.

Network visibility, where shippers can see real-time location updates on their vendor-managed inbound and customer-pickup outbound freight in addition to the already managed freight on the platform, was first introduced in 2019. This gives companies full visibility across their supply chains, enabling them to enhance warehouse operations, reduce yard congestion and improve carrier and driver productivity. Soon after, other vendors such as project44 followed suit offering this capability.

Most RTTVPs have also included electronic documents as a capability within their platform. E-docs like eBOL and ePOD can replace printed copies of documents to be signed at pickup and delivery, physically carried throughout transit and then physically stored somewhere to access later if needed. By utilizing e-doc technology, the creation, signatures, transfer of documents, and storage and access are all electronic so they can be performed via applications and technology solutions (see [Supply Chain Brief: Technologies for E-Docs and Automation in Transportation](#)).

## **End Users Are Adopting These Real-Time Visibility Solutions as a Progressive Journey That Will Provide Additional Capabilities**

Although companies gain data access almost immediately from implementing a visibility platform, the true value comes from deriving actionable insights and spawning actions, which

take time to achieve.

The time it takes to get to the results is also based on the maturity level of the company. Even the most mature companies still need to go on their journey to achieve these insights and to use them to drive improvements in planning or operations. Today, very few companies have successfully navigated the journey where they are able to extract prescriptive insights allowing them to automate their workflows. It is possible, but not without sowing the seeds.

As companies begin to use these solutions, they will typically start with basic visibility and predictive ETAs in the first phase. The second phase needs the first phase as a foundation based on a longer period of data collection as well as time for the solution to “learn.” A third phase, which for most companies is still years away, will welcome more prescriptive capabilities and, ultimately, will automate a part of their decision-making processes (see [5 Building Blocks to Achieve Autonomous Transportation](#)).

### As Companies Look Into the Real-Time Transportation Visibility Market, Here Are Key Factors They Should Consider

The key factors end-user companies should consider when looking into the RTTVP market vendors include:

- **Modal coverage:** Although the main volume of these solutions is for over-the-road transportation, also consider the vendors’ capabilities for other modes such as intermodal, rail, parcel, ocean and air.
- **Global presence:** Many of the contracts have been specific to a single region, but Gartner observes an increasing number of RFPs that are of a more global scope. Understand the regions the vendor operates in.
- **Carrier network:** The size of the carrier network and the quality and depth of the carrier connection will impact the easy onboarding of your carriers, the time to go live with the solution and the quality of the data.
- **Data quality:** The goal of this solution is to receive data that will then be used to create valuable insights. It is important to understand how the vendor ensures the accuracy and quality of the data.
- **TMS/ERP partnerships:** RTTVPs often work complementary to a TMS or ERP. Having existing integrations to a TMS or ERP will speed up implementation and will impact how the data can be used to drive workflows.
- **Compliance:** Connecting to an RTTVP vendor does not always guarantee carrier and data compliance, so it is important to understand how the vendor addresses this. Looking at some reference customers is a good exercise to understand how a vendor achieves this.

## Market Size and Growth

The RTTVP market doubled in size in North America in 2020. This growth was accelerated due to the supply chain disruptions created by the pandemic. Gartner also observed explosive growth in Europe, mainly in Germany, France, the Benelux and Northern Europe. The market in Asia is starting to warm up although the low technology adoption of the shippers and carriers alike is still impeding fast growth.

Gartner estimates the size of the market to have reached close to \$300 million in 2020 and expects it to grow to \$1 billion by 2024. <sup>1</sup>

## Magic Quadrant

**Figure 1: Magic Quadrant for Real-Time Transportation Visibility Platforms**



Source: Gartner (April 2021)

### Vendor Strengths and Cautions

#### Blume Global

Blume Global based in Pleasanton, California, U.S., is a Challenger in this Magic Quadrant. Blume Global provides value to all the participants in the supply chain including shippers, logistics providers and carriers. Blume Visibility provides end-to-end international and domestic visibility with dynamic predictive ETA of shipments, orders and inventory across all modes of transportation including rail, road, air, ocean and barge via Blume Maps. Blume Visibility is offered as a multitenant SaaS solution, with a global network spanning 120 countries localized in 22 languages, that integrates carriers, locations, Internet of Things data sources and weather data. Blume has customers mainly in the transportation, export and retail industries.

### **Strengths**

- **Market Understanding:** Blume leverages 25 years of data combined with real-time data acquisition from the Blume network to feed Blume's machine learning algorithm to produce dynamic predictive ETAs.
- **Offering (Product) Strategy:** Blume has a very strong network in domestic transportation focused on rail, intermodal and drayage. It also has a leading network for ocean and air carriers.
- **Product or Service:** In addition to visibility, Blume Global provides solutions for asset life cycle management, multimodal logistics planning and execution, asset optimization, freight audit and payment, and control tower.

### **Cautions**

- **Geographic Strategy:** Blume has a growing network of domestic over the road (OTR) carriers in the U.S., but outside of the U.S. it has a more limited depth of OTR carriers for FTL and LTL.
- **Vertical/Industry Strategy:** Blume has a huge number of customers in the transportation industry but a much smaller number in industries high in adoption of visibility such as consumer packaged goods (CPG), industrial manufacturing, high tech and healthcare.
- **Product or Service:** Blume trails the Leaders and several Challengers in more extended capabilities such as appointment scheduling and yard visibility.

### **C.H. Robinson**

C.H. Robinson (CHR), based in Eden Prairie, Minnesota, U.S., is a Challenger in this Magic Quadrant. It is best known for its freight brokerage services. TMC is a division of CHR that offers a self-service TMS, Navisphere TMS, as well as a managed service offering called Managed TMS and its visibility solution Navisphere Vision. This visibility solution can be used with the Navisphere TMS or as a stand-alone solution. Leveraging machine learning, predictive analytics and artificial intelligence (AI), it helps avoid supply chain disruptions and make smarter decisions to help ensure products reach their destination and the customers on time. Its visibility customers are mainly in the consumer packaged goods (CPG), retail, high tech and consumer electronics industries.

### **Strengths**

- **Overall Viability:** TMC is a division of C.H. Robinson, the largest broker in the U.S. with a strong commitment to technology. In 2019, C.H. Robinson announced that it will invest \$1 billion in technology over the next five years, and a lot of that investment will be in connectivity and enhancing the platform.
- **Sales Strategy:** C.H. Robinson established a partnership with Microsoft to co-innovate and deploy global complex solutions to its customers. Microsoft presents Navisphere Vision in its executive briefing center as a part of the opportunities on Azure.
- **Offering (Product) Strategy:** C.H. Robinson has existing relationships with tens of thousands of logistics service providers all over the world, which provides leverage over the carriers' compliance and ability to provide real-time visibility insights.

### **Cautions**

- **Product or Service:** Compared to the competition, Navisphere Vision has a small network of TMS partners as TMC is viewed as a competitor in the TMS space. That limits the amount of freight TMC has access to.
- **Sales Execution/Pricing:** The TMC division of C.H. Robinson has a relatively small number of customers spread across several industries.
- **Product or Service:** The Navisphere Vision product lacks a few capabilities that are increasing in importance, such as multimodal ETA, proactive recommendation and collaboration.

### **Convey**

Convey, headquartered in Austin, Texas, U.S., is a Challenger in this Magic Quadrant. Convey's goals are to help companies reduce costs, improve visibility and transform transportation into a competitive advantage, serving modes from parcel to freight in final-mile delivery. Convey's product differs from many other real-time visibility solutions as it collects data instantaneously rather than at a set schedule. Convey's solution goes beyond providing data and reports, allowing carriers and shippers to collaborate in a single view. Most of Convey's customer base is in the retail, consumer electronics and high tech industries.

### **Strengths**

- **Offering (Product) Strategy:** Convey has a strong offering for the last mile and more specifically for retail last mile where visibility can be combined with analytics and customer experience.
- **Product or Service:** In addition to visibility, Convey provides solutions for document creation or management, execution, scheduling, and rating as part of a broader solution set tailored to retail and the last mile.
- **Vertical/Industry Strategy:** For retail customers in the last mile, Convey is a leader in offering visibility plus execution for last mile and retail customer experience.



### **Cautions**

- **Product or Service:** Convey's solution is heavily focused on the last mile and may not be suitable for organizations that ship larger volumes in multiple other modes of transportation such as FTL.
- **Geographic Strategy:** Convey's customer base operates primarily in the U.S. and Canada. Convey has yet to fully capitalize on the growing European and Asian markets.
- **Vertical/Industry Strategy:** While Convey has a large customer base in retail due to its last-mile focus, it only has a smaller number of customers in other industries.

### **Descartes (MacroPoint)**

Descartes, headquartered in Ontario, Canada, is a Challenger in this Magic Quadrant. It is one of the leading transportation technology vendors. Descartes offers a set of transportation and logistics solutions and a global organization to complement and continue the growth of visibility across all modes of transportation and geographies. Descartes MacroPoint is its global freight visibility platform for shippers, brokers and third-party logistics (3PL) providers to get real-time visibility. Its cloud-based solution works with existing in-cab electronic logging devices (ELD), TMS, smartphones, GPS-based trailer tracking and IoT devices, across multiple modes. Descartes has a strong position in the 3PL and broker markets and continues to extend its shipper base.

### **Strengths**

- **Product or Service:** Descartes has the broadest logistics offering of all the vendors in this Magic Quadrant. It has complementary solutions including global shipment visibility, multimodal TMS, global trade functionality, parcel shipping route planning and execution, fleet mobile solutions, dock appointment scheduling, yard management and real-time Bluetooth-low-energy (BLE) air cargo tracking.
- **Sales Strategy:** With a large global customer base, Descartes MacroPoint has a strong network to cross sell its visibility solutions into.
- **Offering (Product) Strategy:** Descartes has one of the largest carrier networks in North America and leverages Descartes' Global Logistics Network to extend its carrier reach.

### **Cautions**

- **Geographic Strategy:** Descartes MacroPoint's customer base operates primarily in North America. It has yet to fully capitalize on the growing European and Asian markets.
- **Sales Execution/Pricing:** Descartes MacroPoint is less visible in major enterprise deals where the Leaders seem to close at a much higher success rate. This is due to its lacking a global footprint including a larger customer and carrier base in Europe, as customers are looking more for global solutions.
- **Vertical/Industry Strategy:** Descartes is less represented across shippers and industries as its focus has historically been on logistics service providers (LSPs) where MacroPoint is a leader

among North American freight brokers, global LSPs and North American carriers.

## FarEye

FarEye, headquartered in Noida, India, is a Challenger in this Magic Quadrant. FarEye has customers in Asia, North America and Europe. FarEye has experience through different industry verticals, with most of its customers coming from the postal, 3PL, retail and e-commerce industries. It also offers executional capabilities for shippers and 3PLs such as vehicle routing and scheduling and benchmarking. The approach is to offer a standard application platform for its customers to run multiple delivery models with a simple drag-and-drop feature, enabling enterprises to reduce time to build new delivery processes. FarEye offers digital ecosystems that connect all freight logistics stakeholders on one platform, fostering collaboration and transparency.

### Strengths

- **Geographic Strategy:** FarEye has a strong customer base in the APAC markets, which is a differentiator from many of the other vendors in this Magic Quadrant. These markets are an area of growth for many other providers, making FarEye an established leader in the APAC region.
- **Product or Service:** In addition to visibility, FarEye provides industry-specific templates with solutions for document creation or management, yard management, execution, scheduling, low-tech carrier enablement, and rating as part of a broader solution set to manage first-, middle- and final-mile transportation.
- **Vertical/Industry Strategy:** Over half of the mode tracking for FarEye is within private or dedicated fleets. The solution offers a single pane of visibility and ease of use for many customers that operate transportation activity in multiple modes, including their own fleet.

### Cautions

- **Geographic Strategy:** FarEye has yet to fully capitalize on the major markets such as the North American and European markets. This is an area of focus for the company in 2021.
- **Sales Execution/Pricing:** FarEye is less visible in major enterprise deals where the Leaders seem to close at a much higher success rate. This is due to its lacking a global footprint including a larger customer and carrier base in North America and Europe, as customers are looking more for global solutions.
- **Vertical/Industry Strategy:** FarEye does not have as broad a range of customers as some of the other vendors in this Magic Quadrant. While FarEye does have some smaller numbers of customers in other industries like manufacturing, pharmaceuticals and quick service restaurants, the majority of FarEye's customers are either 3PLs or retailers.

## FourKites

FourKites, headquartered in Chicago, Illinois, U.S., is a Leader in this Magic Quadrant. It provides cloud-based visibility software solutions to shippers, carriers, 3PLs and freight brokers for predictive, real-time visibility across all modes. FourKites broadened visibility from transportation and extended it beyond the gate to the yard. In 2020, it acquired the YMS module from TrackX to offer dynamic yard management on top of yard visibility. It recently acquired the YMS from Zebra and created a worldwide partnership with this leading IoT provider in logistics. It also created a partnership with Volvo Trucks to integrate tracking off the assembly line, combine engine data with real-time transportation data like facilities and dwell time, and create a foundation for autonomous vehicles. FourKites is mainly focused on large enterprises in the food and beverage, CPG, chemicals, manufacturing, paper and packaging, pharmaceuticals, and retail industries.

### **Strengths**

- **Sales Execution/Pricing:** FourKites is one of the largest RTTVP vendors in terms of revenue, customers and presence in RTTVP deals, especially in North America.
- **Product or Service:** FourKites offers several extended capabilities such as Lane Connect, which facilitates collaboration between partners to reduce empty backhaul miles; Network Visibility, which provides visibility across upstream and downstream partners; and Dynamic Yard Management.
- **Marketing Execution:** FourKites is one of the most recognized vendors in RTTVP with a strong brand and presence in social media.

### **Cautions**

- **Operations:** Unlike other vendors, FourKites puts the ownership of the carrier agreeing to join the network on the shipper while FourKites provides the technical carrier onboarding.
- **Sales Execution/Pricing:** Being a Leader can often result in premium pricing. FourKites pricing is most often higher than the competition. This is an area of focus for the vendor in 2021.
- **Marketing Execution:** Europe is the second largest market for real-time transportation visibility and the fastest-growing market. Yet, FourKites is less present in European deals than other Leaders. This is mainly due to a lack of investment in regional sales presence.

### **IntelliTrans**

IntelliTrans, headquartered in Atlanta, Georgia, U.S., is a Niche Player in this Magic Quadrant. IntelliTrans, a subsidiary of Roper Technologies, offers the Global Visibility Platform (GVP), which provides shipment visibility and execution solutions across truck, rail, barge and ocean transportation modes with a focus on exceptions and customer experience. In addition to in-transit visibility, GVP provides facility visibility and management of yards, docks, inventory and inbound pipelines with increased levels of integration and carrier self-service to minimize detention and demurrage. IntelliTrans also provides TMS, inventory management and supply chain services. IntelliTrans is mainly active in the petrochemicals, metals and mining, logistics service providers, forest products, and building materials industries.

### **Strengths**

- **Market Understanding:** IntelliTrans offers a broad logistics solution. Besides visibility, it offers distribution planning, procurement, load planning, dispatch execution and management, detailed load rack/dock scheduling, and a complete freight audit and payment functionality.
- **Product or Service:** IntelliTrans has a strong network of over 8,000 OTR and rail carriers in the U.S. Almost 50% of its revenue comes from rail and intermodal visibility, which is a core strength.
- **Overall Viability:** IntelliTrans is part of Roper Technologies, a global multibillion dollar company with a large established customer base.

### **Cautions**

- **Marketing Strategy:** IntelliTrans is not very visible in the RTTVP market today. Customer momentum is relatively low, and the vendor does not appear in the many deals that Gartner sees in the market.
- **Geographic Strategy:** IntelliTrans' customer base operates primarily in North America. It has a relatively low presence in Europe, with a nascent European carrier network. It has no carrier networks in Asia.
- **Vertical/Industry Strategy:** IntelliTrans has almost 70% of its customers in just three industries. It has limited to no presence in the leading RTTVP industries such as CPG, retail, healthcare and life sciences, and high tech.

### **Overhaul**

Overhaul, headquartered in Austin, Texas, U.S., is a Niche Player in this Magic Quadrant. Its solution is the first real-time visibility and risk management platform designed to bring compliance to the global transportation industry. It provides a customizable solution that offers device-agnostic, global in-transit multimodal protection of cargo, brand and intellectual property. Overhaul offers solutions across the logistics and supply chain industry from motor carriers and 3PLs to global enterprise shippers and support businesses and from an independent trucking company to a Fortune 10 manufacturer. Its solution provides real-time status and condition of a cargo shipment, issues instant corrective actions and provides a prediction of the cargo's future status. Overhaul is mainly active in the high tech, life sciences and logistics industries.

### **Strengths**

- **Innovation:** Overhaul has an innovative approach to visibility as it ties visibility to risk management for both cargo shippers and logistics service providers, and provides a clear benefit by reducing cargo risk and hence cargo insurance.
- **Offering (Product) Strategy:** Overhaul offers its data insights not just to shippers but also to motor carriers and insurance companies that can improve asset and cargo risk through its

TruckShield product. Hence, it has a broader target group of customers positively impacting its growth and making it quite differentiated.

- **Business Model:** Besides offering risk management and visibility software, Overhaul also provides Fusion Hub, which offers managed services with an operations center that oversees the client's shipments 24/7.

### **Cautions**

- **Sales Execution/Pricing:** Overhaul has a relatively small customer base in a limited set of industries.
- **Geographic Strategy:** Overhaul's customers and revenue are mainly originating from the U.S. It has no revenue in Canada and Mexico, and customers are nascent in Europe and Asia.
- **Marketing Strategy:** Overhaul had a low profile in this market until mid-2019 and is still building its brand in the industry. At this point, its visibility in the market and presence in deals lack that of many other Magic Quadrant participants.

### **project44**

Project44, headquartered in Chicago, Illinois, U.S., is a Leader in this Magic Quadrant. It uses an API-first approach to build network and carrier connectivity to provide a visibility platform that includes a large global, multimodal capacity provider network; quote-to-invoice automation; and extensive data normalization, cleansing and stitching capabilities. It leverages an automated carrier onboarding application called the Network Management Center (NMC) to rapidly grow its network and increase carrier compliance percentages for customers. Project44 provides real-time information, ETAs and predictive insights on vital transportation information across all modes. In March 2021, it acquired Ocean Insights, a leading ocean visibility vendor. Project44 focuses mainly on retailers, manufacturers, distributors and logistics service providers.

### **Strengths**

- **Marketing Execution:** Project44 is one of the most recognized vendors in RTTVP with a strong brand and partnership strategy. For example, SAP announced (late in 2019) its partnership with project44, combining SAP's logistics and execution processes with project44's real-time visibility data and global carrier network into one digital solution.
- **Sales Execution/Pricing:** Project44 is one of the largest RTTVP vendors in terms of revenue, customers and presence in RTTVP deals, especially in North America and Europe.
- **Customer Experience:** Project44 is one of a few vendors in this Magic Quadrant that takes complete ownership and responsibility for the carrier's onboarding to the platform on behalf of the customer, supported by contractual SLA agreements.

### **Cautions**

- **Product or Service:** Compared to other vendors in this Magic Quadrant, project44 offers fewer extended capabilities outside of RTTV within its own platform. However, it does offer some capabilities like electronic documents, transportation planning and some workflow automation, in addition to having a strong partnership strategy to enable other functionality as well.
- **Geographic Strategy:** Project44's customer base is predominantly in North America and Europe. It has yet to fully capitalize on the growing Asian markets.
- **Vertical/Industry Strategy:** While project44 has a broad and strong customer base, it has yet to really build a strong presence in the public sector.

## **RateLinx**

RateLinx, headquartered in Scottsdale, Arizona, U.S., is a Niche Player in this Magic Quadrant. RateLinx focuses on creating customized integrated shipping and logistics management software, TMS and freight invoice management solutions. RateLinx's visibility solution, TracLinx, is focused on carrier compliance and data cleansing as part of its integrated data services. It integrates the order information and purchase order (PO), along with shipment information, invoice information and track-and-trace information, to provide broader insights, focusing on extending insights beyond just RTTV to rate and cost information as well. RateLinx has a strong presence in North America in retail, wholesale distribution and utilities.

## **Strengths**

- **Product or Service:** RateLinx is heavily focused on data and analytics. The company is concentrating on ensuring the data quality behind TracLinx to give customers accurate insights to make decisions.
- **Market Understanding:** TracLinx is a part of a service set offered by RateLinx that allows customers to leverage more capabilities within one solution. In addition to visibility, customers can leverage ShipLinx TMS, PayLinx for freight payment and RateLinx for rating.
- **Customer Experience:** RateLinx has a strong track record in carrier onboarding with high success rates of onboarding its customers' carrier base.

## **Cautions**

- **Geographic Strategy:** RateLinx's customer base operates primarily in the U.S. RateLinx has yet to fully capitalize on the growing European and Asian markets.
- **Sales Execution/Pricing:** RateLinx is less visible in major enterprise deals where the Leaders seem to close at a much higher success rate. This is due to its lacking a global footprint including a larger customer and carrier base in Europe, as customers are looking more for global solutions.
- **Marketing Execution:** Compared to some of the Leaders in this Magic Quadrant, RateLinx does not have as strong a brand presence or momentum in the market.

## Shippeo

Shippeo, headquartered in Paris, France, is a Challenger in this Magic Quadrant. Shippeo's product is the Shippeo Real-Time & Predictive Transportation Visibility Platform. The platform creates effective and transparent collaboration between shippers, 3PLs and carriers to improve the global performance of all supply chain actors. Shippeo provides shippers, carriers and customers instant access to predictive and real-time information on all of their deliveries. Shippeo uses over 200 parameters, high-frequency GPS pings and 35 billion data points to deliver a highly accurate ML-based predictive ETA. In September 2020, Shippeo acquired oPhone, a French real-time transportation visibility player, extending its presence in its home market, and created partnerships with SAP, E2open and TESISQUARE. Shippeo is mainly active in the retail, CPG, high tech and logistics industries.

### Strengths

- **Market Understanding:** Shippeo continues to successfully develop its products and stay aligned with the needs of the market based on input from both existing customers and prospects.
- **Product or Service:** Shippeo offers a strong visibility product with market-leading ETA backed by an agreed-on SLA on predictive ETA accuracy and offers an onboarding service-level agreement for carrier onboarding.
- **Offering (Product) Strategy:** Shippeo offers rapid global deployment with a large carrier base in Europe. It has positive customer feedback and has one of the highest recommendation rates.

### Cautions

- **Geographic Strategy:** Almost all of Shippeo's revenue comes from Europe. It has not yet taken full advantage of the more mature market in North America or the nascent market in APAC.
- **Product or Service:** Shippeo does not offer visibility for air and has nascent functionality and small volumes in rail, intermodal and last mile, which could be a limitation for customers that ship heavily in those modes.
- **Market Understanding:** Shippeo is relatively weaker than its immediate competitors when it comes to supply chain convergence as it is mainly focused on pure transportation visibility.

## Transporeon (Sixfold)

Sixfold, a division of Transporeon, headquartered in Ulm, Germany, is a Challenger in this Magic Quadrant. In 2020, Transporeon acquired Sixfold, which offers a visibility solution that provides shippers real-time location, ETA and status. Sixfold can access and interconnect with not only Transporeon's carrier network but also with other common relevant systems such as Mercareon time slot management integrations for retail end customers and others. Sixfold continues to focus on AI and machine learning for accurate ETAs and management of the customer journey, as well as on automated self-service carrier onboarding to reduce implementation times. Sixfold is

mainly active in the CPG, retail, construction and building materials, and pulp and paper industries.

### **Strengths**

- **Geographic Strategy:** Sixfold is a market leader in RTTVP in Europe with a very strong and extensive carrier network of over 117,000 carriers established throughout Europe.
- **Product or Service:** Sixfold has robust ETA prediction algorithms that take into consideration various factors, like shipment information, plan and external impactors among others, in order to drive reliable and highly accurate ETAs for customers.
- **Marketing/Execution:** The merger with Transporeon has brought quite a bit of additional exposure and market visibility to Sixfold by allowing all Transporeon customers to use Sixfold's visibility for a limited time. Additionally, during the recent COVID-19 crisis, Transporeon offered free visibility to border crossings, bringing more market awareness to its product.

### **Cautions**

- **Geographic Strategy:** Sixfold's customer base operates primarily in Europe. It has yet to fully capitalize on the major North American and growing Asian markets.
- **Sales Execution/Pricing:** Since the merger with Transporeon, free visibility for all Transporeon customers has been offered for a defined time period with a modified pricing structure after that time. Customers have expressed concerns with quoted inflated costs after the free period.
- **Product or Service:** Sixfold hasn't yet built out visibility and connections for tracking air or parcel shipments and has limited functionality for rail, ocean and last mile, which could be a limitation for customers that ship heavily in those modes.

### **Trimble**

Trimble Transportation, part of Trimble and headquartered in Sunnyvale, California, U.S., is a Challenger in this Magic Quadrant. Trimble Visibility's data aggregation technology integrates and supports all shipment information across ocean, rail, intermodal, FTL, LTL and final mile. Trimble Visibility has access to thousands of existing carrier customers and direct data access to 39% of the over-the-road trucks in North America inside the Trimble Transportation TMS and mobility umbrella. Trimble Visibility is heavily invested in the final-mile market. The solution is mainly used in the appliance manufacturing, home consumer goods, beverage production and distribution, grocery producers and distributors, and transportation industries.

### **Strengths**

- **Offering (Product) Strategy:** Trimble Transportation offers a combination of fleet management and transportation management solutions. The acquisition of Kuebix in 2020 extends Trimble's footprint even further in the transportation industry and offers additional functionality outside of pure RTTV.



- **Product or Service:** Trimble offers visibility in all modes. This allows customers with large networks and shipment across many modes to have one view of all their shipments and statuses.
- **Vertical/Industry Strategy:** Trimble has a vast presence in many industries including CPG, retail, industrial/manufacturing and logistics service providers, which demonstrates the vastness of the platform's application and usability.

### **Cautions**

- **Geographic Strategy:** Trimble's customer base operates primarily in North America with some customers in Central America and South America and in Australia/New Zealand. Trimble has yet to capitalize on the growing European and Asian markets.
- **Sales Execution/Pricing:** Trimble is less visible in major enterprise deals where the Leaders seem to close at a much higher success rate. This is due to its lacking a global footprint including a larger customer and carrier base in Europe as customers are looking more for global solutions.
- **Marketing Execution:** Compared to some of the Leaders in this Magic Quadrant, Trimble does not have as strong a brand presence or momentum in the market.

### **Trucker Tools**

Trucker Tools, headquartered in Reston, Virginia, U.S., is a Niche Player in this Magic Quadrant. It provides a carrier relationship management tool mainly focused on 3PLs, brokers and carriers. Trucker Tools' Smart Capacity provides brokers a solution to eliminate inaccurate, stale truckload capacity information and compress the load booking process to eliminate hours of manual phone calls and emails. Smart Capacity includes a visibility solution that helps brokers and 3PL customers get higher visibility compliance and meet their shipper requirements. Trucker Tools covers both small carriers with a smartphone app as well as large carriers with ELD integrations. Smart Capacity is used by over 165,000 carriers and owner operators and more than 1 million truckers across the U.S., Canada and Mexico.

### **Strengths**

- **Business Model:** Trucker Tools has a unique, 100% over-the-road focus on maximizing truckers' asset utilization and helping them save money on the road. The solution also allows brokers and/or shippers to build and nurture their relationships with the carriers to eliminate "one-load wonders."
- **Offering (Product) Strategy:** Trucker Tools focuses on owner operators and small-size to midsize carriers, hauling about 80% of the FTL freight in the U.S. It has by far the largest carrier network in this segment of the market and gets very positive feedback from the carrier community.

- **Product or Service:** Trucker Tools' Load Tracking solution offers fully automated tracking for truckload, LTL and multistop operations. The solution automatically captures start and stop details without depending on driver input while providing the driver with essential services such as parking information and location details through the driver app.

### **Cautions**

- **Vertical/Industry Strategy:** Trucker Tools' main focus is 3PLs, brokers and carriers, where it is market-leading, but it does not serve shippers or other industries.
- **Geographic Strategy:** Trucker Tools' customer base operates primarily in North America with no current plans to expand to the growing European and Asian markets.
- **Product or Service:** Because Trucker Tools' focus is mainly on FTL, it does not provide capabilities or networks for intermodal, rail, parcel and last mile.

### **Vendors Added and Dropped**

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. It may be a reflection of a change in the market and, therefore, changed evaluation criteria, or of a change of focus by that vendor.

#### **Added**

Not applicable, as this is the first Magic Quadrant for this market.

#### **Dropped**

Not applicable, as this is the first Magic Quadrant for this market.

### **Inclusion and Exclusion Criteria**

To be included in this year's RTTVP Magic Quadrant, a vendor must offer:

- **A credible, real-time transportation visibility offering:** A credible, stand-alone RTTVP product, live customers and vision for shipper and non-asset-based 3PL. The RTTVP must include at least transportation visibility, analytics, TMS integration and a solid carrier network. We will evaluate vendors supporting the following shipping modes – over-the-road FTL and LTL at a minimum, rail, intermodal, barge, small package, ocean, air, and private and dedicated fleet.
- **RTTVP market presence:**
  - RTTVP is sold to and used by the buyer, independent of other services offered by the vendor.
- **Vendor momentum and sustainability criteria based on revenue, subscription or customer growth:**

- The vendor must meet one of the following criteria:
  - Previous fiscal-year combined RTTVP subscription and service revenue greater than \$10 million.
  - Current subscription and service revenue greater than \$5 million and a three-year compound annual customer and revenue growth rate of at least 25%.
  
- **Current RTTVP customers:**
  - The vendor must meet all of the following criteria:
    - Must have at least 20 live RTTVP customer references independently and holistically using the solution being evaluated.
    - At least 10 new named customers sold and closed in the previous 12 months (from the survey deadline).
    - Must have implemented at least 10 new named customers on this RTTVP version in the previous 12 months.
  
- **Number of shipments:** The RTTVP vendor must have at least 1 million shipments transacted on its system in the previous fiscal year.
  
- **Global presence:**
  - The vendor must meet all of the following criteria:
    - The vendor must have RTTVP customer references in at least two of the following geographic regions: U.S., Canada, Mexico, South America, France and Benelux, the DACHS region, Eastern Europe/Russia, the Middle East and Africa (MEA), Asia, and the Pacific.
    - The vendor must have a minimum of 10 customers outside of its home geographical region. The vendor must be able to implement and support customers in those other regions.
  
- **Carrier network:**
  - The RTTVP vendor must have at least 1,000 carriers connected (via B2B integration) to its network.
  
- **Cross-industry presence:** The vendor has new and existing RTTVP customers in at least three industries. Examples include 3PL/logistics services, consumer goods, retail, wholesale distribution, high tech, oil and gas, aerospace and defense, automotive, chemicals, life sciences/medical devices, healthcare, and industrial products.

Due to end-user demand for evaluations of other significant vendors' RTTVP offerings, we also consider inclusion of RTTVP vendors that meet one of the following criteria, even if the offering does not meet the initial RTTVP-specific criteria:

- **Application megasuite software vendor:** The vendor must offer its own RTTVP solution, and have greater than \$100 million in enterprise applications software license revenue and greater than \$50 million in SCM (e.g., warehousing, planning, transportation) subscription revenue in 2020. This is because many end users are interested in the transportation offerings of the major application megasuite vendors. The vendor must have sold at least five new named RTTVP customers in the past 12 months, as well as have at least 20 live RTTVP customers.
- **Major SCM suite vendor:** The vendor must offer its own RTTVP solution, and have greater than \$100 million in enterprise applications software license revenue and greater than \$50 million in SCM (e.g., warehousing, planning, transportation) subscription revenue in 2020. This is because many end users are interested in the transportation offerings of the major application megasuite vendors. The vendor must have sold at least five new named RTTVP customers in the past 12 months, as well as have at least 20 live RTTVP customers.
- **Unique and compelling market position in a specific vertical industry or geography:** The vendor must have a unique, compelling and differentiated market position in a specific vertical industry or geography, where this differentiation is important to buyers. New customer win rates, vendors appearing in Gartner client inquiries in these industries or geographies, explicit vendor focus in these industries or geographies, client references, and the vendor's reputation in the industry or geography are considered. The vendor must also meet the revenue and number-of-customers criteria.

We do not include other stand-alone transportation-related software applications such as track-and-trace solutions, telematics solutions and TMS solutions in this Magic Quadrant.

Several RTTVP vendors did not meet Gartner's inclusion criteria for this Magic Quadrant. Although these vendors did not qualify for this research, they may offer a RTTVP solution that would be well-suited to the needs of a specific company. Information on such vendors is included in the Honorable Mention section.

## Honorable Mention

**Autoplant:** Autoplant, headquartered in Mumbai, India, optimizes the supply chain's execution from order placement to freight payment. Autoplant's RTTVP provides information on en route hijacking, tracking driver behavior, proactive weather recommendations, route and risky areas, and backhauls. Autoplant is mainly active in India and Thailand and is focused on overland transportation, including FTL, flatbed and refrigerated transportation, as well as rail. Autoplant is primarily active in cement, steel, chemicals, cold chain, consumer goods and industrial goods manufacturers, as well as at transportation service providers and e-commerce players. Autoplant did not qualify for the RTTVP Magic Quadrant based on minimum revenue and customer requirements.

**EverySens:** EverySens, headquartered in Lille, France, provides a predictive and collaborative visibility platform to plan and track all supply chain flows in real time. EverySens harnesses the power of IoT, big data and AI to boost assets' fleet performance. EverySens has its core strength in rail where it has integrated all the GPS data coming from main rail lessors as well as rail companies in Europe. It also continues to expand in road visibility and packaging visibility. It is active in Europe and plans to expand to the U.S. in 2021, working with market-leading companies in the logistics, steel and CPG industries, as well as others. EverySens did not qualify for the RTTVP Magic Quadrant based on minimum revenue, geographic presence and customer requirements.

**nuVizz:** Headquartered in Atlanta, Georgia, U.S., nuVizz offers two solutions – nuDeliverIt and WellRyde. Its nuDeliverIt offering is a transportation and final-mile delivery planning, execution and network visibility platform. It's a multitenant SaaS platform that connects shippers, logistics service providers and end customers, leveraging the same information and real-time visibility. The platform has a portal-based planning component and a mobile app that helps drivers in the field capture transportation and delivery execution information. NuVizz is mainly active in the CPG, 3PL, carrier, agrochemical and healthcare industries, and focuses on last-mile and people transportation. NuVizz did not qualify for the RTTVP Magic Quadrant based on carrier network requirements.

## Evaluation Criteria

### Ability to Execute

Gartner analysts evaluate providers based on the quality and efficacy of their processes, systems, methods or procedures. This evaluation seeks to determine the extent to which they enable the technology provider's performance to be competitive, efficient and effective, and to positively impact revenue, retention and reputation within Gartner's view of the market.

**Product or Service:** Core goods and services that compete in and/or serve the defined market. This includes current product and service capabilities, quality, feature sets and skills. This can be offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

#### *Evaluation subcriteria:*

- Basic capabilities
- Extended capabilities
- Product alignment to market needs

**Overall Viability:** Viability includes an assessment of the organization's overall financial health as well as the financial and practical success of the business unit. It views the likelihood of the organization to continue to offer and invest in the product, as well as the product's position in the current portfolio.

*Evaluation subcriteria:*

- Assessment of the overall organization's financial health
- The financial and practical success of the business unit
- The likelihood of the individual business unit to continue to invest in the product

**Sales Execution/Pricing:** The organization's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

*Evaluation subcriteria:*

- Presence in deals
- Number of deals closed
- Pricing competitiveness

**Market Responsiveness/Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the provider's history of responsiveness to changing market demands.

*Evaluation subcriteria:*

- Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop
- The provider's history of responsiveness

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand, increase awareness of products and establish a positive identification in the minds of customers. This "mind share" can be driven by a combination of publicity, promotional activity, thought leadership, social media, referrals and sales activities.

*Evaluation subcriteria:*

- Visibility of company in the market
- Current market momentum
- Presence in social media

- Brand strength
- Ability to increase awareness of the products

**Customer Experience:** Products and services and/or programs that enable customers to achieve anticipated results with the products evaluated. Specifically, this includes quality supplier/buyer interactions, technical support or account support. This may also include ancillary tools, customer support programs, availability of user groups and service-level agreements.

*Evaluation subcriteria:*

- Customer sales experience
- Implementation experience
- Carrier onboarding experience
- Overall satisfaction with the solution
- Technical support or account support

**Operations:** The ability of the organization to meet goals and commitments. Factors include quality of the organizational structure, skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently.

*Evaluation subcriteria:*

- Ability to meet goals and commitments
- Effective and efficient operation of the business

**Table 1: Ability to Execute Evaluation Criteria**

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	Medium
Sales Execution/Pricing	High
Market Responsiveness/Record	Medium
Marketing Execution	Medium

Evaluation Criteria ↓	Weighting ↓
Customer Experience	High
Operations	High

Source: Gartner (April 2021)

## Completeness of Vision

Gartner analysts evaluate providers on their ability to convincingly articulate logical statements. This includes statements on current and future market direction, innovation, and customer needs and competitive forces, and how well they map to Gartner's view of the market.

**Market Understanding:** Ability to understand customer needs and translate them into products and services. Providers that show a clear vision of their market listen, understand customer demands and can shape or enhance market changes with their added vision.

*Evaluation subcriteria:*

- Product alignment to the market
- Ability to identify and close product gaps
- Ability to communicate value to the market
- Supply chain convergence (offering beyond RTTVP)
- Thought leadership/visionary trends in RTTVP

**Marketing Strategy:** Clear, differentiated messaging consistently communicated internally and externalized through social media, advertising, customer programs and positioning statements.

*Evaluation subcriteria:*

- Website, advertising, social media presence
- Customer programs and positioning statements

**Sales Strategy:** A sound strategy for selling that uses the appropriate networks including direct and indirect sales, marketing, service and communication. This includes having partners that extend the scope and depth of market reach, expertise, technologies, services and their customer base.



*Evaluation subcriteria:*

- Strategy for globally selling product
- The scope and depth of market reach

**Offering (Product) Strategy:** An approach to product development and delivery that emphasizes market differentiation, functionality, methodology and features as they map to current and future requirements.

*Evaluation subcriteria:*

- Product, design, architecture, development and delivery
- Functionality, methodology, usability and feature set

**Business Model:** The design, logic and execution of the organization's business proposition to achieve continued success.

*Evaluation subcriteria:*

- The soundness and logic of the underlying business proposition

**Vertical/Industry Strategy:** The strategy to direct resources (sales, product, development), skills and products to meet the specific needs of individual market segments, including verticals.

*Evaluation subcriteria:*

- Broad presence in a large number of industries (minimum of three)
- Solution applies to multiple industries

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes.

*Evaluation subcriteria:*

- Vendor's vision for extending the depth and reach of RTTVP
- Offering new, enhanced or different ways to manage visibility and provide greater business value

**Geographic Strategy:** The provider's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries, as appropriate for that geography and market.

*Evaluation subcriteria:*

- Current presence across the globe
- Growth efforts across multiple regions
- Leadership within a single region or subregion

**Table 2: Completeness of Vision Evaluation Criteria**

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High
Marketing Strategy	Low
Sales Strategy	Medium
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	High
Innovation	High
Geographic Strategy	High

Source: Gartner (April 2021)

## Quadrant Descriptions

### Leaders

Leaders have a compelling vision and a reliable Ability to Execute. Leaders in the RTTVP market have broad, deep and differentiated functionality that addresses a broad range of user requirements. These vendors have proven products and track records of customer success and have demonstrated momentum in growing their market presence. Leading vendors support transportation visibility strategies for large customers with substantial freight volumes, as well as demonstrate their ability to deploy their solutions to smaller shippers. Leaders should also offer adaptable technical architectures that allow for rapid innovation, which is needed to stay ahead of market demands.

Leaders are innovators with compelling strategies for addressing the ongoing market changes related to the emergence of new technologies, expanded modal support and support for global transportation operations. Leaders are also furthest ahead in supporting the transportation needs of multiple geographies and adding capabilities to support the more complex needs of multileg global logistics and transportation. Leaders listen to their customers; but, just as important, their customers look to them for thought leadership, and they establish symbiotic relationships.

#### Key Characteristics:

- Broad and deep RTTVP offering
- Participation in a high percentage of new deals
- A strong and consistent track record
- Consistent performance and vigorous client growth and retention
- Enduring visibility in the marketplace from both sales and marketing perspectives
- Broad and deep carrier network
- Presence across a large number of industries
- Proven ecosystem of partners
- Global scale

#### Challengers

Challengers offer reliable RTTVP solutions and have a historically reputable presence in generally supporting moderately complex transportation visibility requirements. However, Challengers trail Leaders in certain aspects of RTTVP, such as technology, functional breadth, modal support and global geographic presence. Challengers may have reasonable RTTVP functional breadth or depth, but they may lack functionality in innovative areas, such as global multimodal visibility, appointment scheduling, yard visibility or certain aspects of advanced analytics. Challengers are often followers that introduce emerging capabilities only after these capabilities have been established in the market by more innovative vendors. In addition, Challengers trail Leaders in the depth and breadth of their carrier networks and technology partners.

#### Key Characteristics:

- Capable, proven RTTVP solution, with numerous live customers
- Consistent track record of successful implementation
- Offerings that are not as broad or as deep as RTTVP Leaders' offerings
- Lacking or trailing in carrier networks and technology partners

- Lacking the same global scale as RTTVP Leaders

## Visionaries

Visionaries have a compelling vision for achieving a differentiated position in the RTTVP market, possess strong visibility vision and capabilities, and are innovating beyond basic RTTVP capabilities. However, they lack certain characteristics in their Ability to Execute. Visionaries might have compelling product strategies, but they lack market momentum, have too few live customers, have functional gaps in their RTTVP or lack the market presence to move higher in their Ability to Execute. At a minimum, solutions in the Visionaries quadrant fall into one of two broad categories. They can be established RTTVP offerings that have yet to mature into leading positions in the market, or they can be innovative offerings from specialist vendors with unique and potentially disruptive views of where the market is going. These vendors can exhibit innovation in RTTVP products, services, or go-to-market and deployment strategies, but lack innovation in other areas.

### Key Characteristics:

- Coherent, compelling and innovative strategy that seeks to deliver a robust and vibrant offering to the market
- Thought leader in one or more RTTVP solution dimensions that tend to be on the leading edge of emerging concepts
- Not yet demonstrating an ability to handle a broad range of user requirements
- Execution gaps or lacks global scale
- Innovation in RTTVP products, services, go to market strategy, and vertical or deployment strategies

## Niche Players

All RTTVP solutions in this Magic Quadrant support core RTTVP capabilities across multiple for-hire modes of transportation, including those of vendors in the Niche Players quadrant. Niche Players are often functionally satisfactory for many users, smaller shippers or companies with moderate visibility complexity or sophistication. Niche Players could well be the best choice for these types of users. However, these vendors offer solutions lacking the full depth, breadth or robustness of functionality demanded by the most complex and sophisticated RTTVP users; might have limited global presence; or lack a persuasive vision for RTTVP. These vendors might also lack the experience, number of clients, customer references or business viability of the leading vendors in the market. Yet, Niche Players are often viable or preferable for many RTTVP buyers.

### Key Characteristics:

- Focus primarily on a limited geography or industry

- Generally, not a differentiated offering, although it can have some unique capabilities
- Not yet well-established and visible in the market
- Not a broad or deep RTTVP solution
- Market momentum and product or company viability that is possibly in question
- Lacking in carrier networks and technology partners

## Context

Gartner tracks multiple software application types that support the various needs of transportation operations, such as multimodal TMS, stand-alone fleet routing and scheduling, stand-alone parcel management, international logistics platforms, real-time transportation visibility platforms, and carrier-centric TMS. For more information, see [Market Guide for Vehicle Routing and Scheduling](#), [Market Guide for Multicarrier Parcel Management Solutions](#), [Hype Cycle for Supply Chain Execution Technologies, 2020](#), [Magic Quadrant for Transportation Management Systems](#) and [Warehousing and Fulfillment Vendor Guide](#).

This research focuses specifically on real-time transportation visibility platforms providing visibility to mainly domestic modes of shipping, such as full truckload (FTL), less than truckload (LTL), intermodal, rail, small package, totes, and private or dedicated fleets. Furthermore, the emphasis in this research is on solutions that support primarily FTL and LTL visibility (as that is the biggest part of the market need). We do, however, consider certain solutions focused on last-mile visibility as a stand-alone offering, as this is of growing importance to shippers such as retailers and manufacturers. All RTTVP providers covered in this research offer carrier connectivity to a large network of carrier companies, data integration and analytics. However, market and transportation economic and business conditions are driving companies to use visibility for more modes, which places more importance on a provider being able to offer multiple modes of transportation for visibility. Companies are looking increasingly for a “single pane of glass” or singular platform for all their transportation visibility independent of mode and region of transportation.

## Market Overview

Providing visibility is a core part of supply chain technology, and it plays a complementary function that supports different supply chain functions such as transportation management, warehouse management, yard management and fleet management. It allows logistics leaders insights into what is happening in the organization as well as outside their organization to control end-to-end processes.

Supply chain visibility is a capability that provides controlled access and transparency to accurate, timely and complete information on data and events within and across organizations and services to support effective execution of supply chain operations.

The main purpose of supply chain execution is to fulfill orders (procurement and sales), manage inventories, and move or deliver products (components and finished ones). RTTVPs are a subsegment of the supply chain visibility space (see [Supply Chain Operational Visibility Vendor Guide](#)).

RTTVPs combine key features such as a strong carrier network with real-time tracking of shipments, analytics and reporting, as well as integration to core business systems. They provide a multitude of benefits in the areas of customer service, carrier management and transportation processes, enabling higher service levels and/or order fulfillment rates and efficiency gains for all (for example, brand owners, logistics service providers and carriers). These solutions provide the parties with location and condition monitoring (mainly temperature) and provide capabilities such as real-time tracking, status updates, exception management, ETA calculation, and analytics and reporting. These solutions are based on a foundation of business system integration, data integration and analytics.

## Evidence

<sup>1</sup> Based on Gartner market sizing and forecast data created by the analysts based on market information, the number of deals in the market, vendor survey data and end-user insights.

## Evaluation Criteria Definitions

### Ability to Execute

**Product/Service:** Core goods and services offered by the vendor for the defined market. This includes current product/service capabilities, quality, feature sets, skills and so on, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability:** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

**Market Responsiveness/Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

**Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

## Completeness of Vision

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service, and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

**Geographic Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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