

PTOLEMUS in a nutshell

Advising all stakeholders in mobility markets

November 2024

Strictly confidential - PTOLEMUS intellectual property



PTOLEMUS' mission: help stakeholders define and implement their strategy for sustainable mobility



Providing actionable thought leadership, strategies and solutions for sustainable mobility

PTOLEMUS is the first strategy consulting & research firm entirely focused on connected mobility & automation

Advisory services

Strategy definition	M&A / investment assistance	Procurement strategy
Innovation management	Business development	Project management

Market analysis services

Market reports	Market forecasts	Custom market research
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Fields of expertise

Mobility services	Car pooling Car sharing	Emergency services MAAS	Micro-mobility Ride hailing	Smart parking Driving Risk Management
Connected vehicle	bCall eCall Fleet telematics	SVT / SVR Tracking VRM	Parking Navigation	Speed cameras Traffic information
Decarbonisation	BEV EV charging	Fleet electrification Fuel cards	Fuel cells Hydrogen	PHEV Vehicle-to-grid
Usage-based charging	Car As A Service Congestion charging	Electronic Toll Collection	Road User Charging UBI / PAYD	Vehicle rental Vehicle leasing
Vehicle data & analytics	AI CAN-bus	Data protection Driving behaviour	OBD Predictive analytics	Remote diagnostics xFCD
Vehicle automation	ADAS	Autonomous cars	Autonomous trucks	Robo-taxis Shuttles
Enabling technologies	Positioning (GNSS / WiFi / cellular)	IoT connectivity Smartphones Sensors	Telematics devices V2X	DSRC / RFID ANPR

We help clients across the ecosystem of mobility

Analytics, maps & apps providers



Automotive OEMs & suppliers



Telematics solution providers



Mobile telecom players



Fleet, tolling & ITS



Device & location suppliers



Insurers, aggregators & assistance providers

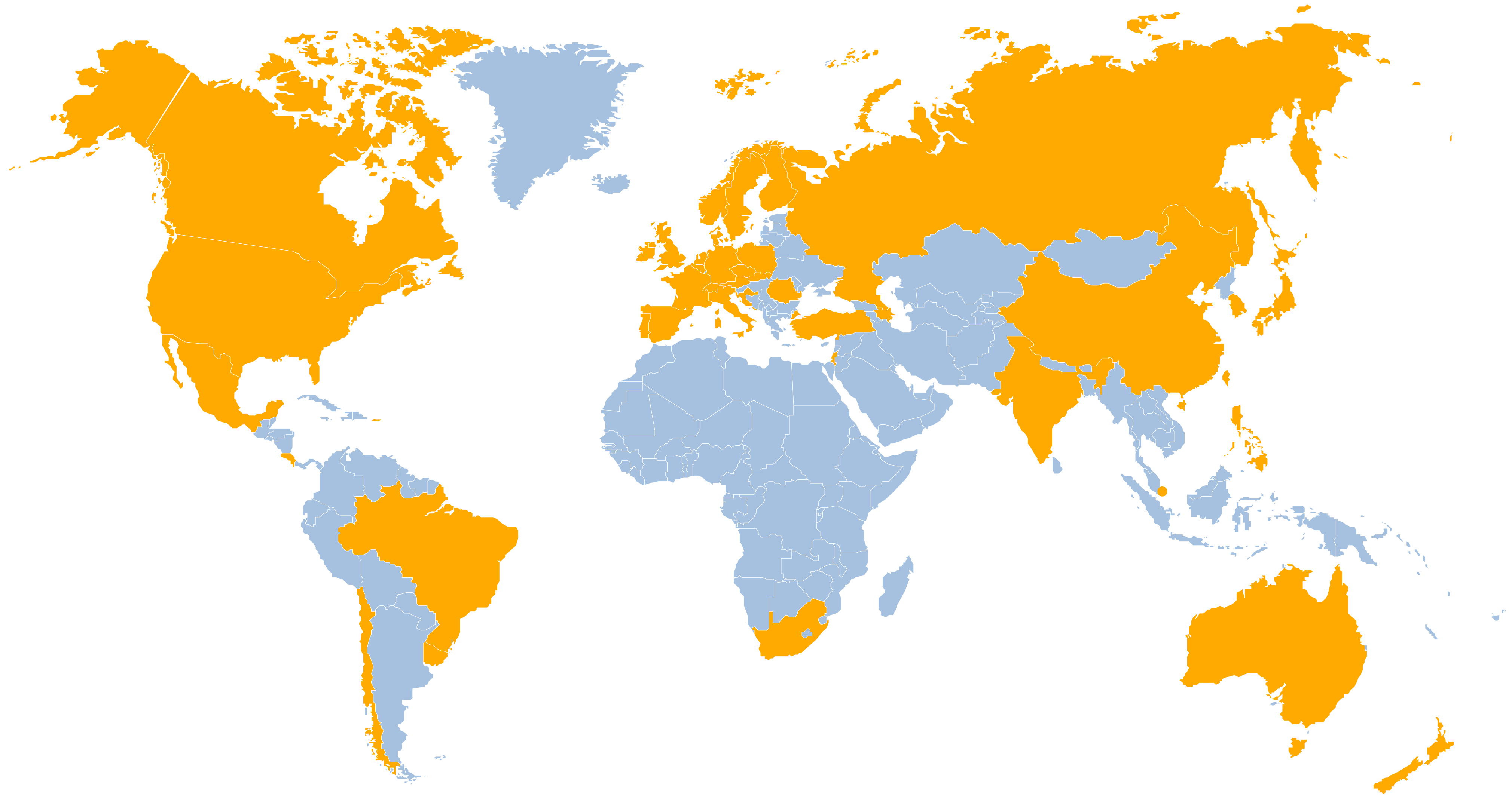


Banks & private equity investors



Our team serves over 400 clients in 41 countries

■ Clients



We have performed over 210 consulting assignments to help our clients define & implement their strategy



Advised on the optimal structuring of the GNSS truck tolling scheme



Conducted the due diligence of TransCore, the global leader of tolling & traffic management solutions



Helped the company define its insurance telematics strategy



Evaluated the costs & benefits of the deployment of E112 emergency solutions in 7 countries



Helped evaluate OEMs' interest for its Open Location Platform



Helped start up its new connected car services business



Define its 5-year US fleet services strategy & go-to-market plan



Evaluated & forecast the tolling & ETC markets in a Nordic market



Defined strategic positioning in the field of fleet connected vehicle services



Detected opportunities from connected & autonomous vehicles for the space industry



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Helped the company's shareholders raise complementary funding

Smart parking solution provider



Helped the company identify market opportunities in Smart City mobility



Performed the vendor due diligence of eDriving, the global driver risk management (DRM) provider



Led the technology due diligence of Arvento, the leading Turkish fleet management service provider



Defined its global data & analytics strategy to predict incidents



Defined its connected car services strategy & delivery plan



Led the technology due diligence of Lytx, the leading US video-based fleet Telematics Service Provider



Assisted a global leader in responding to SNCF' connected train tender



Mapped the technical landscape of connected vehicle data

Vehicle leasing company



Identified & selected potential acquisition targets in automotive fleet software management

Fuel card company

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Help our client and its portfolio companies identify satellite-enabled market opportunities

Mobility & infrastructure holding company



Evaluated the European electronic tolling services market



Defined its fleet services' pricing strategy & marketing plan across Europe



Help the company in defining its 10-year strategic plan



Appraised the global market for truck digital & telematics solutions



Assisted the board in its strategy definition for 3 years



Conducted the strategic review of its mobility services business



Quantified future opportunities in shared mobility services



Appraised the US commercial line insurance telematics market



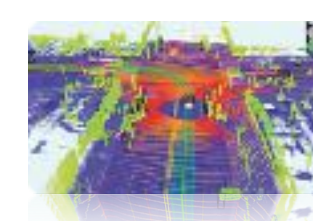
Evaluated & forecast 8 different mobility markets in a Nordic country



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Defined the strategy & business plan of its telematics programme



Evaluated the market potential of HD maps for autonomous vehicles



Appraised the potential of 10 vertical markets for its mobility platform solution

MAAS platform provider



Helped the mobile operator detect IoT connectivity prospects in China



Evaluated the feasibility of moving to Open Road Tolling across its road network



Evaluated the analytics solution of Octo Telematics, the global UBI solution provider



Helped our client detect & assess M&A targets in the fleet electrification supply market



Conducted the due diligence of 2 fleet / EV software companies

Large engineering group



Identify the best practices of Electric Vehicle apps

American vehicle manufacturer



Evaluated the feasibility of a RUC programme for electric vehicles (EVs)

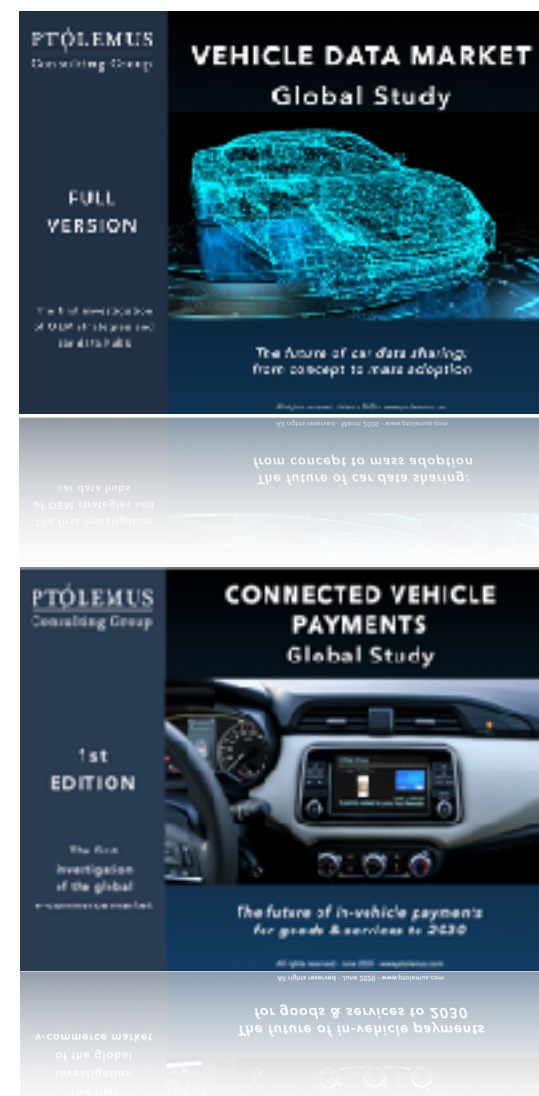
European country's Ministry of Transport

PTOLEMUS has published 30 landmark reports across the mobility spectrum

AUTONOMOUS DRIVING



CONNECTED VEHICLE



ELECTRIFICATION



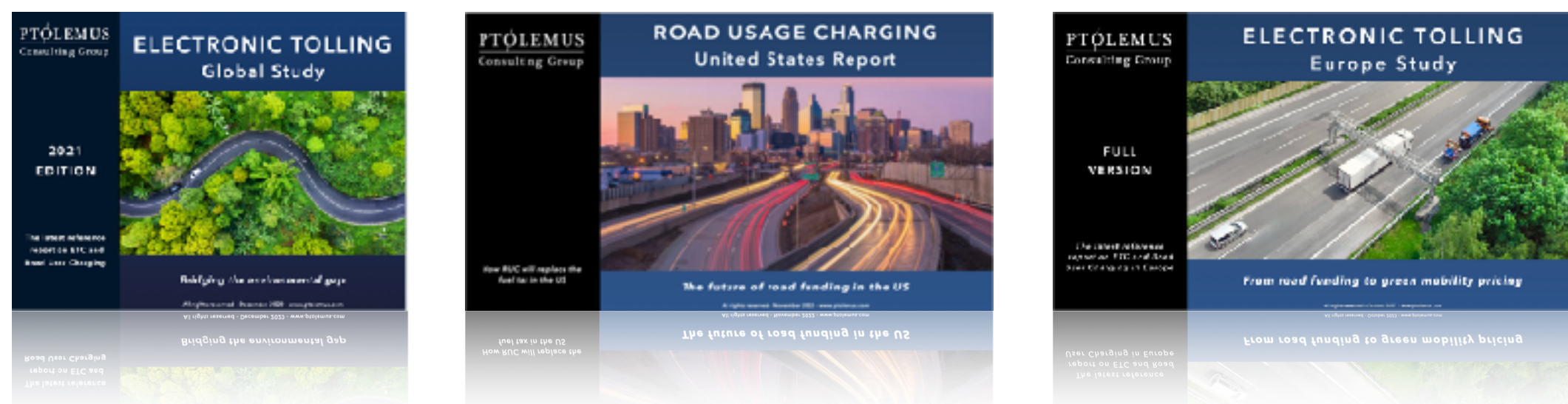
FLEET MANAGEMENT



INSURANCE



ELECTRONIC TOLLING

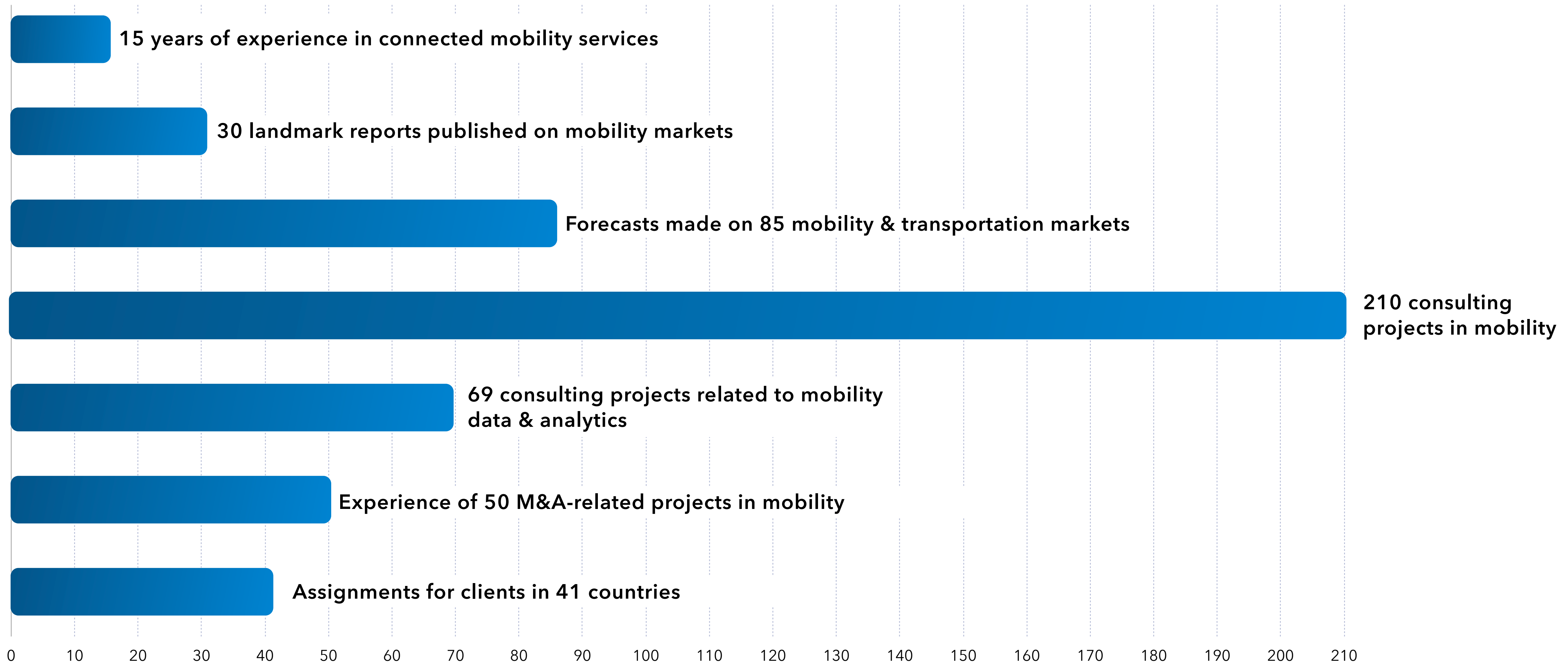


MOBILITY



Notes: 1. Most of our reports come with bottom-up 2020-2030 market forecasts for 18 regions
 2. To receive all our reports & other research, a subscription model exists

A unique experience of mobility globally



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