

PTOLEMUS Consulting Group

Mapping connected vehicle & mobility markets

Our research publications



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The consulting & research firm for the connected world

Consulting services

Strategy
definition

Investment
assistance

Procurement
strategy

Innovation
management

Business
development

Deployment

Research services



Fields of expertise

Mobility services

Car pooling
Car sharing
Smart parking

Multimodal
mobility
Ride hailing

Road side
assistance
Tax refund

Vehicle services & telematics

bCall
eCall
FMS
SVT / SVR

Tracking
VRM
In-car Wi-Fi
Fuel cards

Parking
Navigation
Speed cameras
Traffic information

Usage-based charging

Car As A Service
Electronic Toll
Collection

Mobility-as-a-
Service
Road charging

UBI / PAYD
Vehicle rental
Vehicle leasing

Vehicle data & analytics

AI
CAN-bus
Crowd-sourcing
Data protection

Driving behaviour
OBD
Predictive
analytics

Remote
diagnostics
xFCD

Vehicle automation

ADAS

Autonomous
cars

Autonomous
trucks

Enabling technologies

Positioning (GNSS
/ WiFi / cellular)

M2M /
connectivity
Smartphones

Telematic devices
V2X

Clients across the mobility ecosystem...

Analytics providers



Automotive manufacturers & suppliers



Mobile telecom operators



Applications providers



Telematics solution providers



ITS operators, regulators & fleets



Device / location suppliers



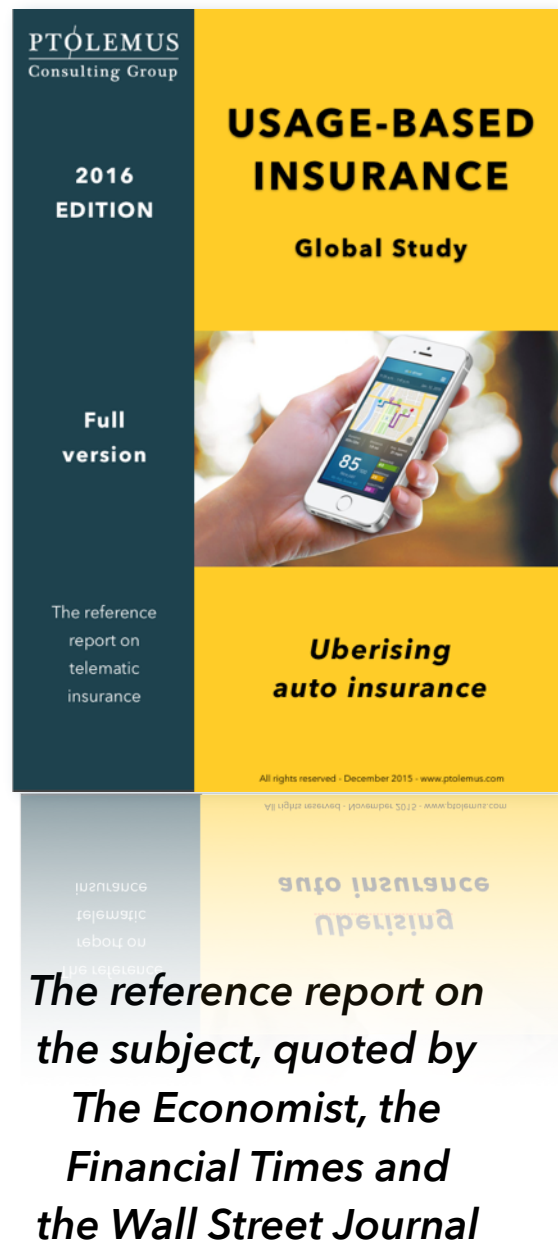
Insurers, aggregators & assistance providers



Banks & private equity investors



The study reveals how UBI will become mainstream and 'uberise' the auto insurance sector



- **1,200 pages of research using:**
 - 286 interviews in 28 countries
 - 5 years of research performed by 6 consultants in 4 countries
 - Insights from 45+ consulting projects
 - Our experience & vision of the ecosystem incl. OEMs and TSPs
 - 422 figures (charts, tables, etc.)
- **42 case studies** including Allianz, AllState, Carrot Insurance, Vodafone Auto, Ingenie, OnStar- Progressive, Discovery Insure, Liberty Mutual, Octo Telematics, Renault Amaguiz, State Farm, Unipol, Zurich
- **A handbook of 69 suppliers' solutions** including our own evaluation and ranking
- **28 insurance markets profiled**
- **2020 & 2030 market forecasts**
 - Canada, US, Latin America, Europe, Russia, South Africa, India, Chinese and Japan
 - Personal line / commercial line
 - Aftermarket / OEM
- **Analyses of the disruptive forces at play**
 - ADAS and autonomous vehicles
 - The eCall & ERA Glonass mandates
 - The rise of smartphone apps
 - Big Data & analytics
- **Targeted recommendations** for insurers, regulators, TSP, OEMs and operators

The UBI Study is a searchable PDF document that can be used by the whole company, worldwide



Reports

Full Study
with 2020 & 2030 market forecasts

Contents

- 1,200+-page study (PDF format, password-protected)
- Bottom-up 2015-30 market forecasts outputs with graphs (Excel format, password-protected)
- 69 company profiles (Analytics suppliers, TSPs, TTPs, start-ups)
- 30 country profiles

**Company-wide
licence**

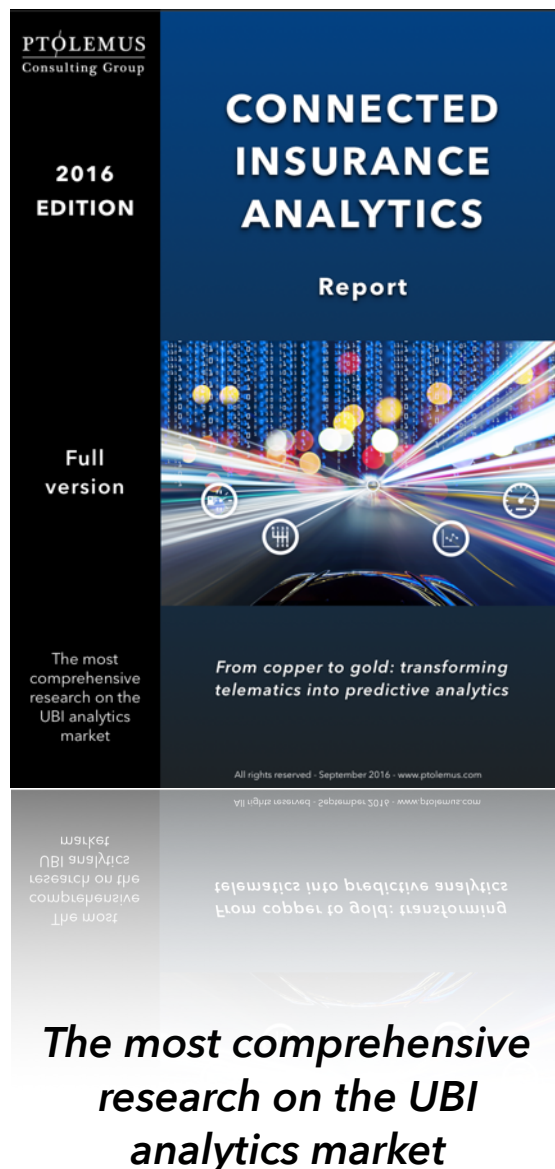
€ 8,990

Approx. \$9,300

**Now also
includes the
CIA report**

For more information and to order the study, contact fbruneteau@ptolemus.com

This report has one objective: helping insurers transform Big Data **copper** into Analytics **gold**



- Analysis of the pricing and data management policies of the **27 largest UBI programmes** including :
 - Admiral, Allianz, Allstate, American Family, AXA, Generali, Desjardins, Direct Line Group, State Farm, The Hartford, UnipolSai, Uniqa and Zurich
- Based on **40 in-depth interviews** with Telematics Service Providers (TSPs), analytics providers and insurers
- **5 interviews transcribed:** Nationwide, Insurethebox, LexisNexis Wunelli, Octo Telematics and The Floow
- Illustrated by case studies from companies using advance analytics such as: Progressive, Generali, Insure the box and many more
- Profile and review of **10 advanced analytics suppliers** active in UBI
 - Accenture, Cambridge Mobile Telematics, Cognizant, HERE, IBM, IMS, SAS, Verisk Analytics and Willis Towers Watson
- Findings and recommendations **validated by 150 academic papers** and journals
- All that in a **340+ page document** with over 150 graphs and tables
- Resulting in **20 best practices** including recommendations on how to record and process driving data, score drivers and interact with them.

Download the 90-page abstract today at www.ptolemus.com/cia-abstract

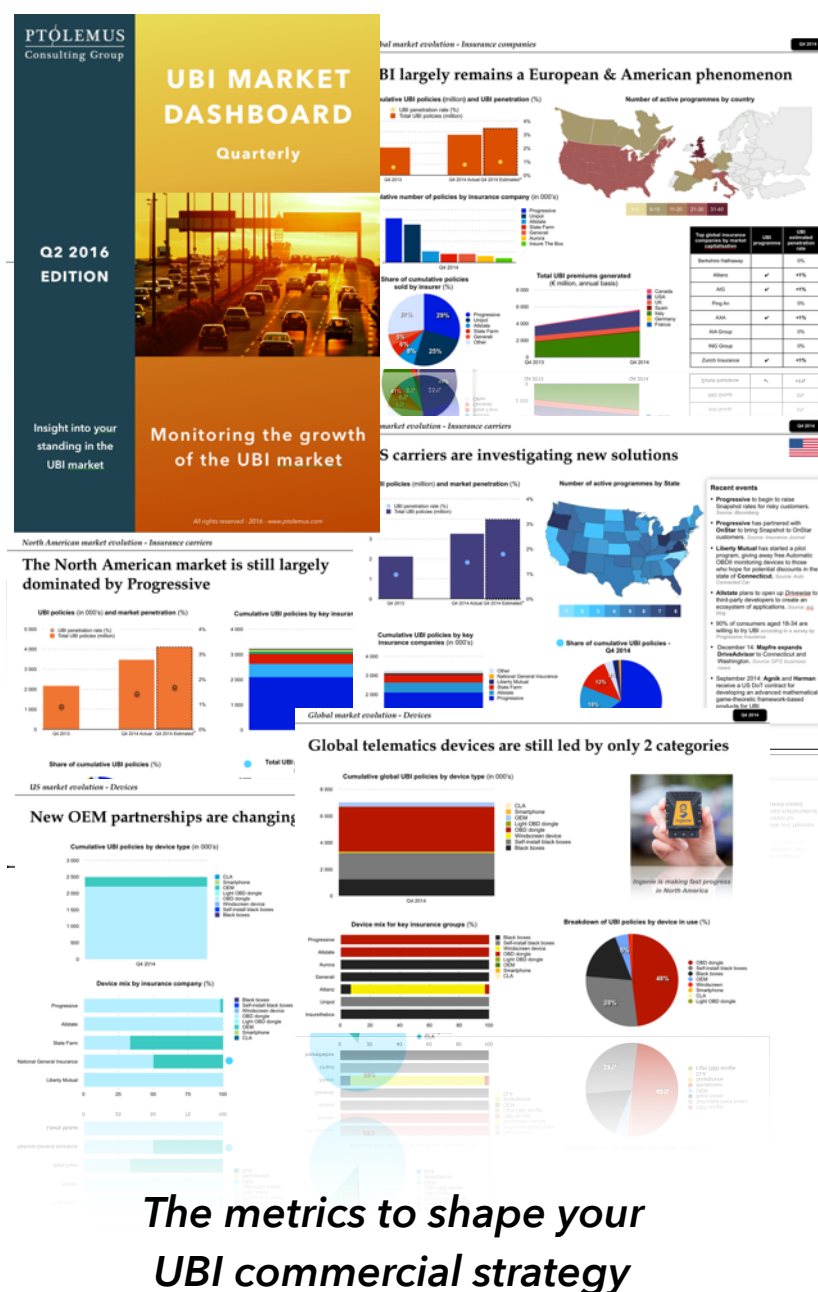
The CIA report is a searchable pdf document that can be used by the whole company, worldwide



Reports	Connected Insurance Analytics Report Only
Contents	<ul style="list-style-type: none">• 340-page study (pdf format, password-protected)• 10 company profiles• 20 best practices• Recommendations to insurers and analytics providers
Company-wide licence	€ 3,995 Approx. \$4,350

For more information and to order the update if you already have the UBI Global Study 2016, contact me at fbruneteau@ptolemus.com

Our quarterly UBI dashboard monitors the market metrics every quarter in 14 countries



- **100-page barometer of the global UBI industry**
 - Covers 170 companies
 - Issued on a quarterly basis
 - 230 charts, tables & figures
- **A global dashboard covering**
 - Mature markets: US, Canada, France, Germany, Italy, Spain, UK
 - **Emerging markets:** APAC, Australia, Benelux, China, Latin America, other European markets
- **Leverages both public information and primary research**
 - A large set of public information collected from conferences, desk research, etc.
 - Supplemented and validated by primary research & data (Interviews, supplier questionnaires, own market forecasts, etc.)
- **Brings all key market news**
- **Estimates UBI volumes and sales for all main players**
 - Insurance companies
 - TSPs
 - Technology providers
- **Deciphers the key market trends**
 - UBI penetration
 - Number of programmes
 - Mix by business model (PAYD, PHYD, TBYB, etc.)
 - Market share of all main insurers, TSPs and device makers
 - Technology mix (Black boxes, OBD, apps, etc.)
 - Business line mix
 - Segment mix (Young drivers, mature drivers, etc.)
 - Channel mix aftermarket / OEM

On top of a quarterly subscription product



The metrics to shape your UBI commercial strategy

Reports	UBI market dashboard		UBI market dashboard + Business Intelligence service (quarterly)
	Annual version (1 copy)	Quarterly version (4 copies)	
Full Scope	<ul style="list-style-type: none"> • 100-page slide presentation (pdf format, password-protected) • All UBI market statistics globally and in 14 countries • 230 charts, tables & figures 		<ul style="list-style-type: none"> • 120-page slide presentation (pdf format, password-protected) • All UBI market statistics globally and in 14 countries • 230 charts, tables & figures • Key UBI market news
Company-wide licence	€ 58,000 <i>Approx. \$62,000</i>	€ 88,000 <i>Approx. \$94,000</i>	€ 120,000 <i>Approx. \$128,000</i>

For more information and to order the update if you already have the UBI Global Study 2016, contact me at fbruneteau@ptolemus.com

The UBI dashboard can also be split by regional focus



The metrics to shape your UBI commercial strategy

Reports	Global + North America	Global + Europe	Global + Asia & emerging markets
	Quarterly version (4 copies)		
Regional scope	<ul style="list-style-type: none"> • 40-page slide presentation (pdf format, password-protected) • All UBI market statistics in the chosen area • 60 charts, tables & figures 	<ul style="list-style-type: none"> • 60-page slide presentation (pdf format, password-protected) • All UBI market statistics in the chosen area • 110 charts, tables & figures 	<ul style="list-style-type: none"> • 40-page slide presentation (pdf format, password-protected) • All UBI market statistics in the chosen area • 90 charts, tables & figures
Company-wide licence	<p>€ 45,000</p> <p>Approx. \$48,000</p>	<p>€ 45,000</p> <p>Approx. \$48,000</p>	<p>€ 45,000</p> <p>Approx. \$48,000</p>

For more information and to order the update if you already have the UBI Global Study 2016, contact me at fbruneteau@ptolemus.com

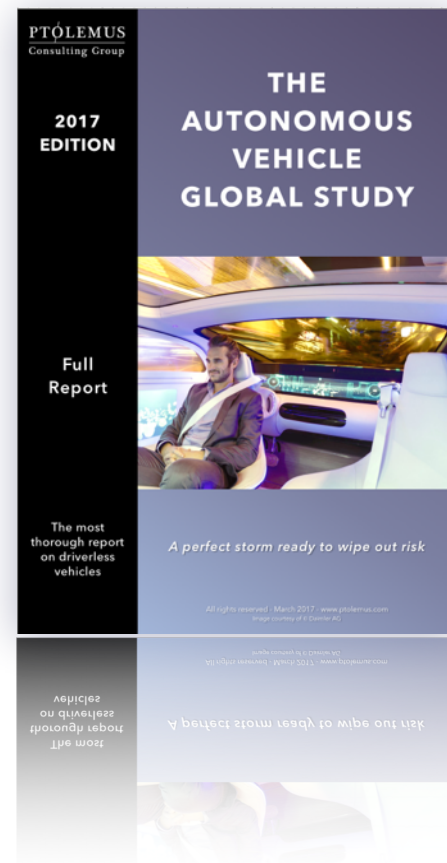
PTOLEMUS brings unparalleled depth of knowledge in connected and autonomous vehicle services



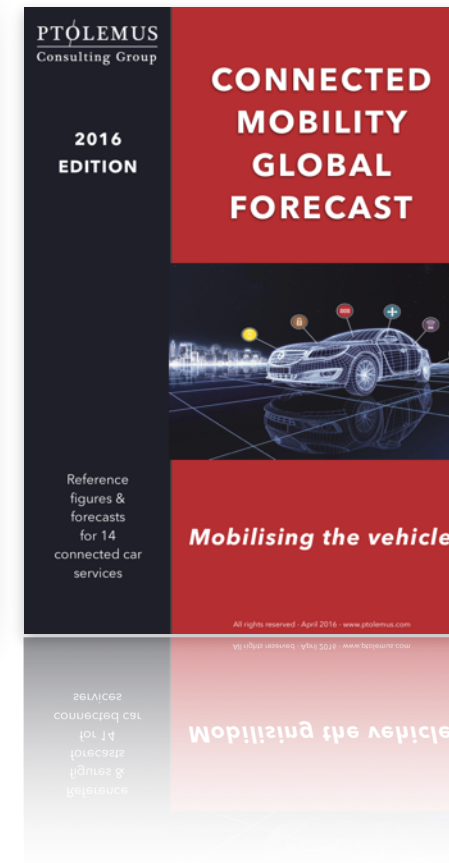
The reference report on UBI, quoted by The Economist, the Financial Times and the Wall Street Journal



The most comprehensive research on insurance analytics



The most thorough analysis of ADAS and AVs



Referenced figures and forecasts for 14 connected car services



The reference on vehicle payment services

Outstanding research, recognised globally

They mentioned PTOLEMUS research



PTOLEMUS Consulting Group

Strategies for Mobile Companies

Brussels - Boston - Chicago - London - Milan

New York - Moscow - Paris - Toronto

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