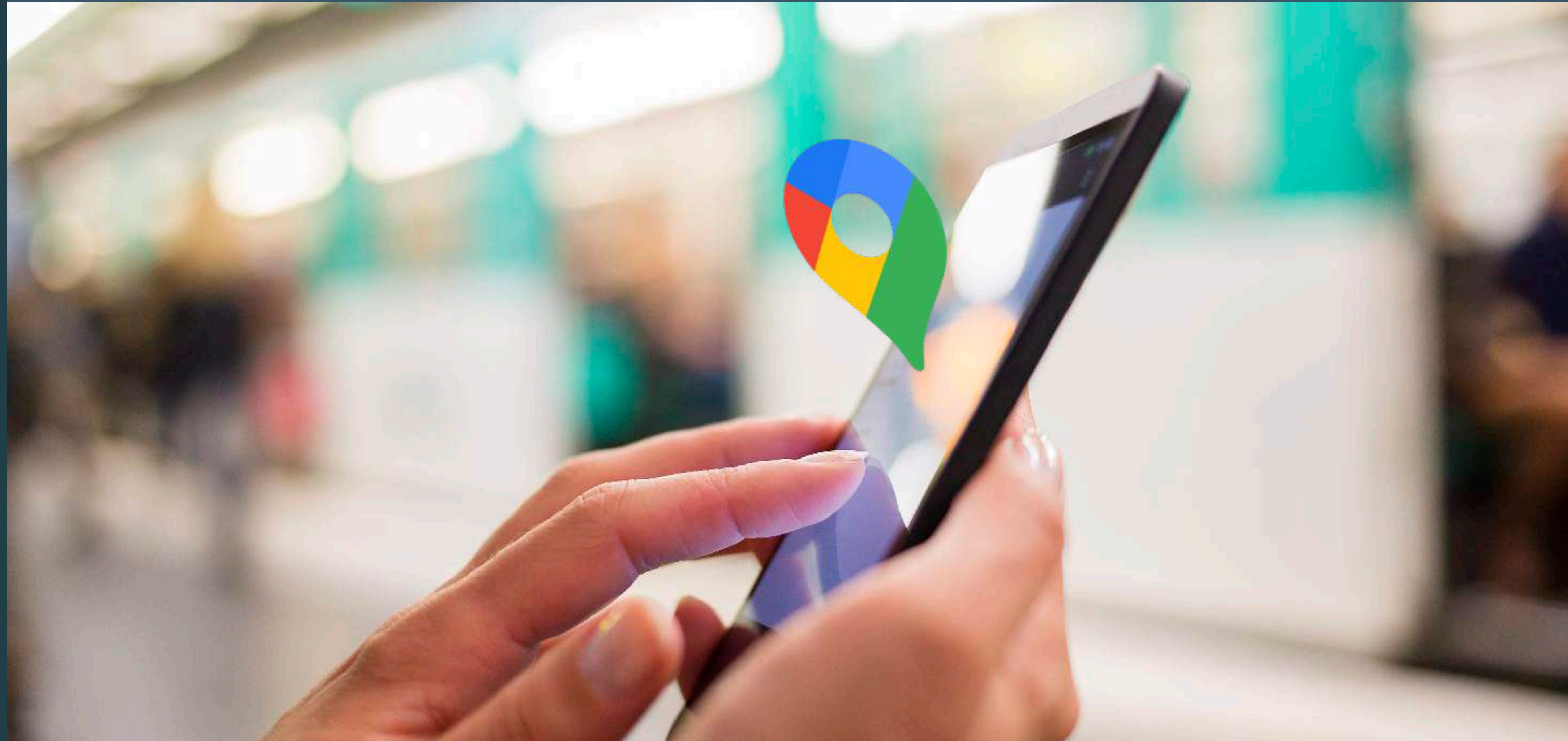


GOOGLE IN MOBILITY

Report

**FREE
ABSTRACT**

The first analysis
of Google's
future urban
mobility strategy



*From Google Maps to Google MaaS
Will Alphabet take over mobility?*

The first report analysing whether, how and when Google will take over the urban mobility market

- A **130+ page analysis** of Google's current and future strategy in the MaaS market, based on:
 - **10** years of constant market surveillance
 - PTOLEMUS mobility experience with nearly **200** consulting assignments across the mobility ecosystem
 - **8** months of research and analysis including interviews with more than **15** mobility stakeholders
- **An in-depth analysis of Google's success to date**
- **An analysis of Google's partnerships and actions in urban mobility**
- **An overview of Google's strategy and initiatives in the mobility field, including Google Maps, Google Wallet, Waze and Waymo**
- **A detailed analysis of 4 strategy alternatives that Google could adopt in MaaS, including booking and ticketing & payment**
- **An evaluation of the future MaaS evolution scenarios, including customer segment needs and future drivers of demand and supply**
- **An assessment of the future role, position and strategy of Google in the MaaS market based on**
 - The 3 main scenarios we identified and their respective likelihood to be enacted
 - A forecast of Google's revenues and EBITDA generated by MaaS in Europe in the 3 main strategy alternatives



More than just market research.

In-depth strategic analysis and a complete tool to help your organisation make the right decision in the MaaS market

In this report, we respond to 11 questions that are absolutely crucial to understand the future of Google in MaaS



The report leverages PTOLEMUS' mobility experience and the expertise of 8 consultants and researchers (1/2)



Frederic Bruneteau

Managing Director



Alberto Lodieu

Senior Manager



Andrew Jackson

Research Director



Svetlana Tvorogova

Research Consultant

Experience

27 years

The founder of PTOLEMUS, Frederic has accumulated 25 years of experience of the mobility and transport domain.

He has become **one of the world's foremost experts of connected mobility** and is interviewed on the subject by publications such as the *Financial Times*, *Forbes*, the *Wall Street Journal* and *The Economist*.

He has **led over 180 consulting projects and helped many world leaders define their strategy and implement it.**

Clients he has served include A-to-Be, Abertis Mobility Services, AGC Automotive, Allianz, Axxès, AXA, Baloise, Bombardier, BP, Bridgestone, HERE, the European Commission, Hitachi, Octo Telematics, Orange, Société Générale, ST Engineering, Telepass, TomTom, Toyota, Transurban, wejo and WEX.

Frederic supervised the research of the Mobility Platform Suppliers Handbook in 2018 and fully reviewed this report.

14 years

Alberto has 14 years of experience in strategy consulting, and has participated to over 60 consulting assignments.

He has specialised in connected mobility, location-based services, electronic toll collection, road usage charging, autonomous vehicles, and usage-based insurance.

He has assisted 40+ organisations in defining their mobility strategies, launch new services, perform commercial due diligence

Alberto has been leading our work to build a global picture and forecast of mobility trends: new players, new vehicle types, new business models, smart city initiatives, etc.

Alberto is a regular speaker at mobility, location-based services and fleet conferences.

He led the research and writing of our landmark 750-page Global Mobility Roadbook (2019)

Alberto coordinated the research, writing and review of the report.

15 years

With a career in market research spanning 15 years, Andrew has over 11 years of experience working in the automotive and industrial sectors.

Andrew has led and participated in many automotive and telematics market research projects:

Provided forecasts for the growth of EVs in the UK, to a leading automotive media company;

Provided insights to a major telematics technology provider regarding the future of connected vehicles

Led the global research and created 5-year sales forecasts for a major geospatial data analysis company's go-to-market strategy;

Provided insight and analysis on the automotive aftermarket for some of Europe's key tier-1 suppliers.

As PTOLEMUS' Research Director, Andrew supervised and contributed to the research and writing of this report.

20 years

Svetlana has gained experience with a very large set of organisation such as Arthur D. Little, Bamberg University (Germany), Erasmus University Rotterdam, the Higher School of Economics of Moscow, EuroWejo and the World Bank.

For more than 10 years, Svetlana taught at the Research University - Higher School of Economics (Moscow, Russia), which nominated her for the Nation's best lecturer, and at Bamberg University, Germany.

Some key projects Svetlana completed include:

Helped a vehicle data hub understand fleets' use of telematics and interest for vehicle data services in Europe and North America;

Helped a private equity firm evaluate the future demand from insurance companies for UBI solutions in Europe and North America;

Svetlana led the primary research, and participated to the writing and review of the report.

Biography

The report leverages PTOLEMUS' mobility experience and the expertise of 8 consultants and researchers (2/2)



Laura Pájaro
Research Analyst



Damien Orsoni
Business Analyst



Nan Chu
Research Analyst



Claudia Lozano
Senior Business Analyst

Experience

4 years

An architecture, transportation and mobility technologies enthusiast, Laura holds a master degree in Urbanism from the VUB and ULB, Brussels.

Suggested possible functionalities and case uses for a master mobility centre operating in Flanders and Brussels, Belgium

Since Laura joined PTOLEMUS she conducted first and secondary research on Mobility-as-a-Service and User-Based Insurance.

She participated fragmenting regional research reports and creating case studies.

Key projects she completed include:

Helped to understand the likelihood to choose specific tracking technologies for the implementation of RUC in Brussels

Revised business plan to consider opportunities to expand architectural services to the middle east market

Laura participated in the research, writing and review of the report.

3 years

A passionate of strategy consulting and new technologies, Damien Orsoni has studied in France, the Netherlands and Italy. Within PTOLEMUS he has developed an expertise on Usage-Based Insurance (UBI), Telematics and Connected Mobility.

Damien's most important consulting assignments include:

For a major US telecommunication operator, he helped defining its entry strategy into European and Asian emergency services markets,

For a major European assistance group, he designed their connected vehicles strategy, value proposition, MVP and implementation roadmap,

He participated in the research and writing of PTOLEMUS' Connected Auto Insurance Global Study, an in-depth analysis of the connected auto insurance industry, and contributed to the design of the 2020-2030 market forecast.

Damien participated in the research, writing and review of the report.

3 years

Before joining PTOLEMUS, Nan has worked in marketing research covering China & Europe, enabling stakeholders in industries such as ICT, logistics and biopharmaceutical, to identify, explore and leverage business opportunities.

Nan's recent projects include:

For a European telecoms company, he helped identify the top Chinese companies in the mobility business that require cellular connectivity.

For a human resources consulting firm in Europe, he helped organising a major advertising campaign targeted for Chinese speaking clients.

Within PTOLEMUS, Nan has contributed to our new Commercial Fleet Telematics Global Study.

Nan participated in the research and writing of the report.

6 years

A Toulouse Business School alumnus, Claudia worked at Accenture on strategy consulting assignments for the mobility sector:

For a multinational car manufacturer, she helped determining the User Recognition technologies to implement on the connected vehicle.

For several User Recognition technologies, Claudia performed benchmarking analysis including OEMs and OESs, identified relevant use-cases.

For a leading railway company, she supported the definition of a governance structure for the infrastructure projects.

Claudia has also worked on business transformation out of the mobility sector.

Claudia also acquired experience during her internship at IBM as a Junior Consultant on a business transformation project.

Claudia participated in the research and writing of the report.

Biography

This report is divided into 6 sections

1 Introduction

1. Definitions
2. Context
3. The 5 levels of MaaS

2 Google's initiatives in mobility

1. What has Google been doing so far?
2. Alphabet and Google
3. Zoom in to Google Maps
4. Waymo
5. Google Wallet
6. Waze

3 Mapping Google's strategy in urban mobility

1. Cross-selling & synergies
2. Competition in the mobility market
3. EU regulations
4. Alignment with the corporate strategy

4 The future of the MaaS market

1. MaaS drivers and inhibitors
2. Future MaaS scenarios

5 The future role of Google in the MaaS market

1. Google's current position
2. Return and risk assessment
 - 2.1. Potential revenues
 - 2.2. Cross-selling and synergies
 - 2.3. Competition
 - 2.4. Regulation and relationship with the EU
 - 2.5. Alignment with the corporate strategy
3. Google's future alternatives
4. Google's future position in the MaaS ecosystem

6 Conclusion and recommendations to stakeholders

The report comes with a single, worldwide company licence



For more information about the report, email contact@ptolemus.com



You can purchase the report by requesting an invoice or buy online** (Visa or MasterCard) on our website

	Report ONLY
Contents	<ul style="list-style-type: none">• A 130+ page analysis of the current and future Google’s strategy in the MaaS market• An overview of Google’s strategy and initiatives in the mobility field, including Google Maps, Google Wallet, Waze and Waymo• A detailed analysis of 4 strategy alternatives that Google could adopt in MaaS, including booking and ticketing & payment• An evaluation of the future MaaS evolution scenarios, including customers’ segments needs and future drivers of demand and supply• An assessment of the future role, position and strategy of Google in the MaaS market based on<ul style="list-style-type: none">- The 3 main scenarios we identified and their respective likelihood- A forecast of Google’s revenues and EBITDA generated by MaaS in Europe in the 3 main strategy alternatives
Company-wide licence	995 €

Google in MaaS report

About PTOLEMUS



PTOLEMUS is the first strategy consulting and research firm entirely focused on mobility and transportation



Strategy consulting services

Strategy definition	M&A advisory	Procurement strategy
Partnership strategy	Business development	Market forecasting



Market research services

Off-the-shelf reports	Subscription services	Custom market research
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Fields of expertise

Electrification	Emergency services	IoT & connectivity
Mobility services	Motor insurance	RUC and tolling
Vehicle data and analytics	Vehicle services	Vehicle automation

PTOLEMUS has completed nearly 200 consulting assignments and served over 350 clients across the mobility ecosystem

Analytics, maps & apps providers



Automotive OEMs & suppliers



Banks & private equity investors



Device & location suppliers



Mobile telecom operators



Insurers, aggregators & assistance providers



ITS, smart city and infrastructure solution providers



Telematics solution providers



**Our team of consultants, experts and analysts with 12 nationalities,
serve our clients in 41 countries**



PTOLEMUS has published nearly 30 landmark reports and market forecasts on mobility markets

AUTONOMOUS DRIVING



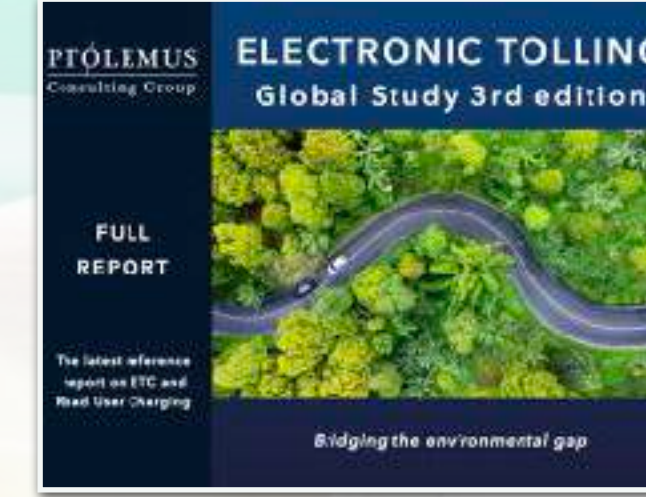
CONNECTED VEHICLE



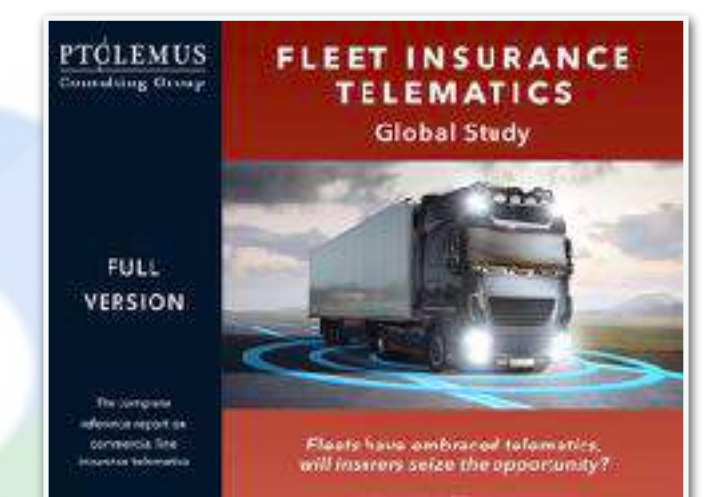
ELECTRIFICATION



ROAD INFRASTRUCTURE FUNDING



FLEET MANAGEMENT



INSURANCE



MOBILITY



Notes: 1. Most of our reports come with bottom-up market forecasts for 18 regions for 10-year timeframe,
2. To receive all our reports & other research, a subscription model exists

PTOLEMUS Consulting Group

Strategies for Mobile Companies

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