

PTOLEMUS in a nutshell

Advising all stakeholders in mobility markets

December 2022

Strictly confidential - PTOLEMUS intellectual property



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

Strategy consulting services

Strategy definition

Investment assistance

Procurement strategy

Innovation management

Business development

Project management

Market research services

Off-the-shelf reports

Subscription services

Custom market research

Fields of expertise

Mobility services	Car pooling Car sharing MAAS	Micro-mobility Ride hailing Shared mobility	Smart parking Tax refund
Vehicle services	bCall eCall Fleet telematics SVT / SVR	Tracking VRM In-car Wi-Fi Parking	Navigation Speed cameras Traffic information
New energies	BEV EV charging Fuel cards	Fuel cells Hydrogen	PHEV Vehicle-to-grid
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 Robo-taxis	Driverless Shuttles
Enabling technologies	Positioning (GNSS / WiFi / cellular) M2M / connectivity	Smartphones Sensors Telematics devices	V2X DSRC / RFID ANPR

We serve over 350 clients across the ecosystem of mobility

Analytics,
maps &
apps
providers



Automotive
OEMs &
suppliers



Mobile
telecom
players



Telematics
solution
providers



Tolling &
ITS



Device &
location
suppliers



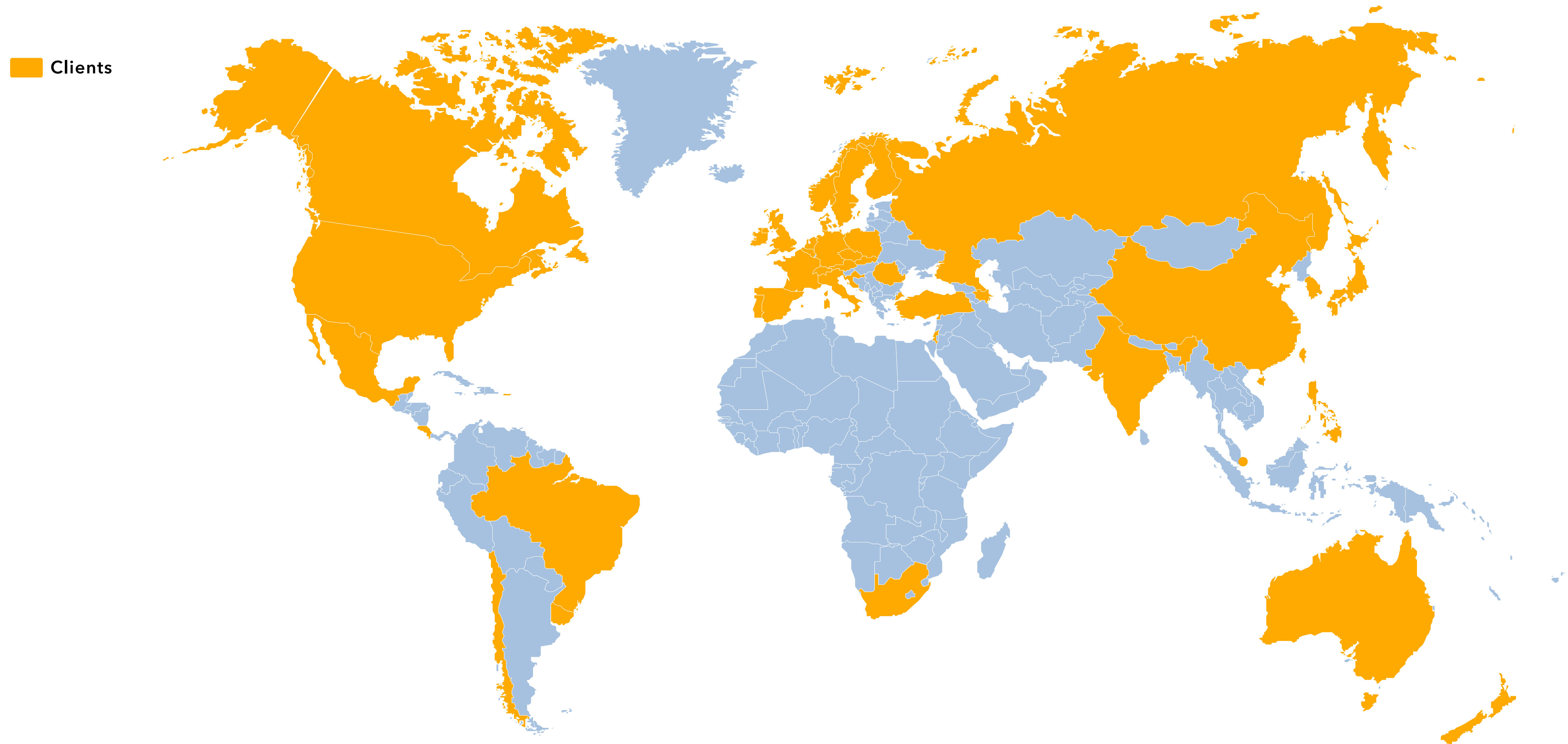
Insurers,
aggregators
& assistance
providers



Banks &
private
equity
investors



Our team of consultants, experts and analysts with 13 nationalities serves our clients in 41 countries



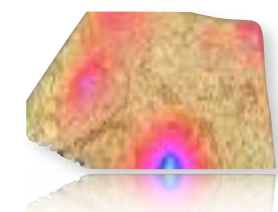
We have performed nearly 200 consulting assignments in mobility and transportation



Defined strategic positioning in insurance telematics value chain



Helped evaluate global OEMs' interest for its Open Location Platform



Defined the company's strategy to leverage mass cellular positioning data



Evaluated the technologies & business potential of the EU electronic tolling market



Helped the OEM leverage its data for its insurance telematics strategy



Quantified future opportunities in shared mobility services



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



Advised on the optimal structuring of the Dutch truck tolling scheme



Ministry of Infrastructure and Water Management



Helped start-up its new connected car services business



Assisted in identifying all building blocks of its telematics solution and sourcing them



We have performed nearly 200 consulting assignments in mobility and transportation



Benchmarked the European market for ETC, fuel card & tax refund services

Major fuel card provider



Conducted the strategic review of a major road operator's mobility services business

Major road operator



Defined its strategic positioning in the field of fleet connected vehicle services



Built company strategy, value proposition & go-to-market plan in fleet mobility services

Global electronic tolling supplier



Assisted in forging partnerships in EU connected vehicle ecosystem

Global tolling system provider



Understand the trends of the commercial road transport & payment markets

Group of energy companies



Helped the company define its telematics investment strategy



Detected opportunities from connected & autonomous vehicles for the space industry

Space agency



Defined an automotive tier-1 supplier's entry into the European ETC market











European oil company



Helped the fuel card business unit the impact of key mega-trends in fleet services on their strategy

European oil company

We have performed nearly 200 consulting assignments in mobility and transportation

	Perform a market sizing of the global EV market opportunity	Power grid & power generation systems group		Perform a high level analysis of EV OEMs in North America	Large IT supplier
	Help our client make acquisitions in the fleet electrification supply market	Large Asian engineering group		Help the company in defining its 10-year future strategic plan	Global ITS leader
	Identify the best practices of EV apps to help it design the app of its new EV	Major outdoor vehicle OEM		Assisted the board of its technology unit in its strategy definition	Global motorway operator
	Valuation of a global EV bus & coach fleet telematics solution provider	Charging solution provider		Definition of their future mobility services value proposition, strategy and roadmap	Roadside assistance group
	Conduct the due diligence of 2 fleet / EV software companies	Large engineering group		Conducted the strategic review of a major road operator's mobility services business	Major road operator

Source: PTOLEMUS - Note: * Our project qualifications are further described in the "PTOLEMUS detailed qualifications" document

PTOLEMUS' research business unit also publishes landmark reports and market forecasts

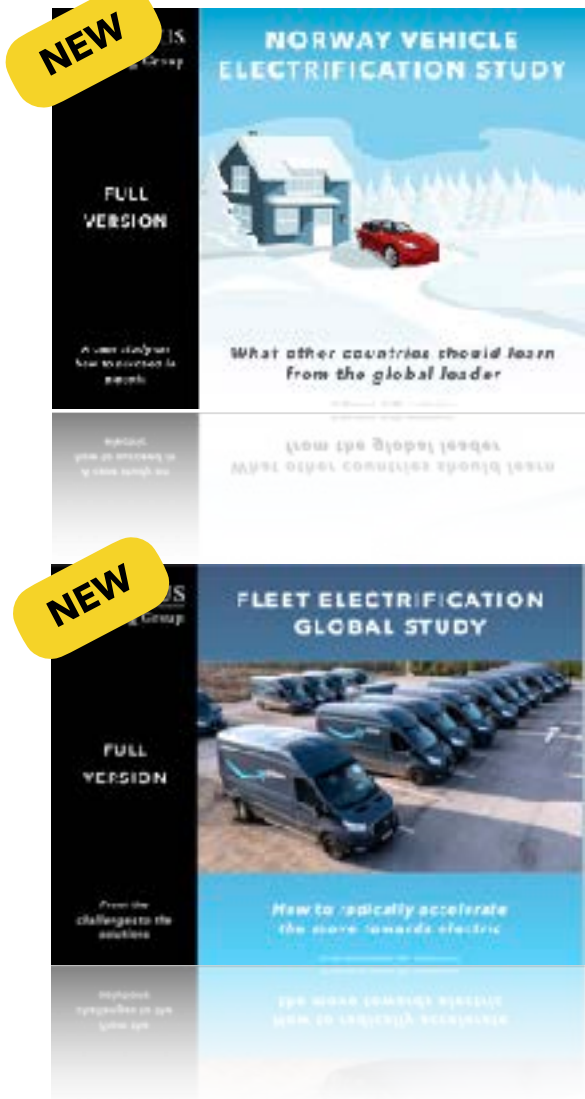
AUTONOMOUS DRIVING



CONNECTED VEHICLE



ELECTRIFICATION



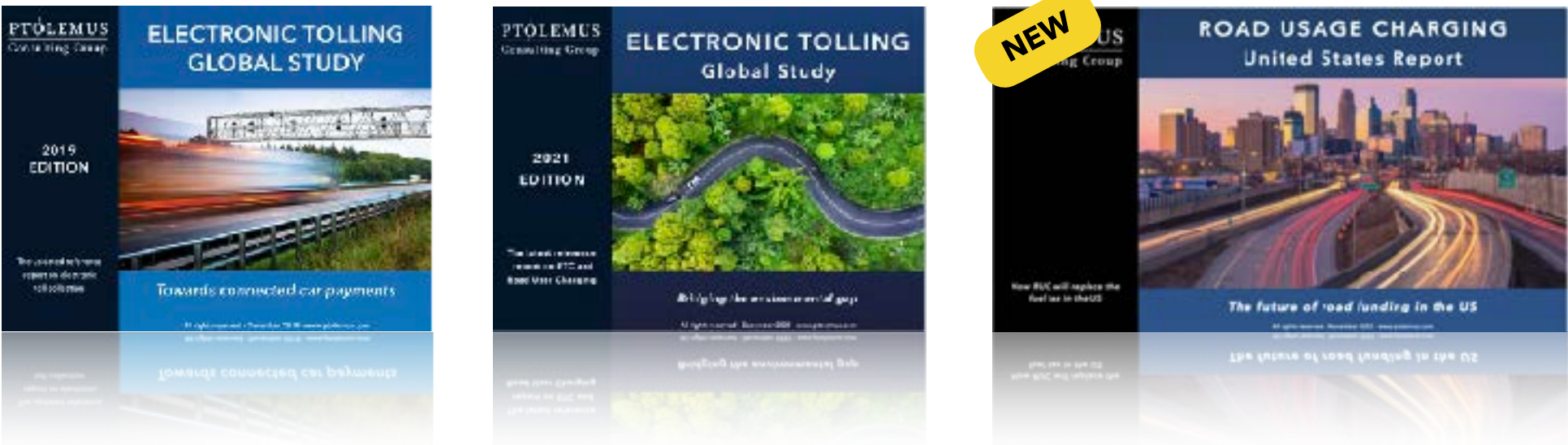
FLEET MANAGEMENT



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

We recently advised ST Engineering on the largest tolling & ITS M&A transaction of the year

On 3rd October 2021, ST Engineering announced its acceleration in the Smart City growth with the acquisition of TransCore for \$2.7 billion



Men Leong Chew,
President, Urban Solutions
ST Engineering



*« PTOLEMUS Consulting Group supported us in the commercial due diligence for the proposed acquisition of **TRANSCORE**. »*

Their team demonstrated commitment and dedication.

We were able to leverage on both their deep expertise of the global tolling & ITS industries and outstanding analysis to achieve a good outcome. »

PTOLEMUS Consulting Group

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