

ELECTRONIC TOLLING

Global Study

**2019
EDITION**

The updated reference
report on electronic toll
collection



Towards connected vehicle payments

The first strategy consulting & research firm entirely focused on augmented 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
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)

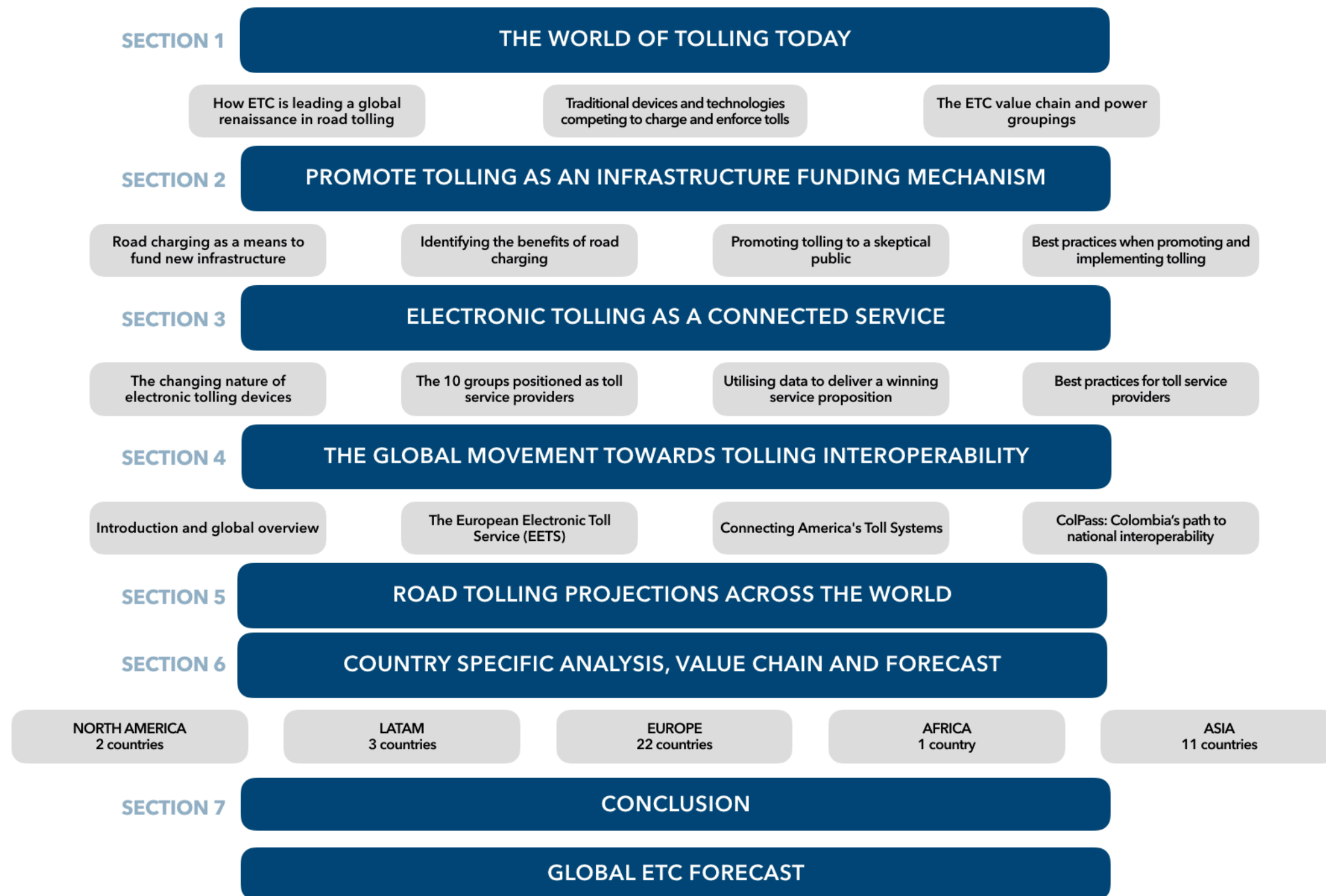
M2M /
connectivity
Smartphones

Telematic devices
V2X

How PTOLEMUS can help you beyond this study

- **Strategy definition**
 - Road policy strategy assistance
 - Market entry assistance
 - Data strategy and analysis
 - Mobile tolling strategy development
 - Multimodal mobility design and planning
 - Future vision of vehicle payments
- **Investment assistance**
 - Due diligence
 - Feasibility studies
 - Market forecasting
 - Cost benefit analyses
- **Procurement**
 - Definition of road charging schemes
 - Assistance to tenders
 - Selection and sourcing of ETC technology
- **Business development**
 - Partnership strategy definition
 - Assistance to tender response
- **Project management**
 - Assistance in management of road pricing projects
 - Congestion charge project management

The Electronic Tolling Global Study is the go-to report for the entire road charging ecosystem



The most comprehensive report on electronic tolling and road user charging



More than just market research

A strategic analysis on the future of ETC as a connected mobility service

- An **update to our 2015 Electronic Toll Collection Global Study** providing an all-encompassing overview and outlook on the electronic tolling market. It includes:
 - Strategic position
 - Service breakdown
- **750-page analysis of the global electronic tolling landscape** based on:
 - 7 years of constant market surveillance
 - 50 interviews with key stakeholders
 - 6 months of desk research by a team of 7 consultants
 - 20 strategy consulting assignments
- **An in-depth review of the 40 biggest toll domains worldwide** with traffic volumes, technology, model, size and revenues projections
- **A comparative assessment of all tolling technologies:**
 - Deployment models and impacting trends for ANPR, DSRC, Infrared, GNSS and RFID
 - Forecast of the technology mix
- **An impact analysis of interoperability in tolling:**
 - Forces and models shaping interoperability
 - Review of current projects in Europe, US and Colombia
 - Impact of the different models on toll chargers and service providers
- **12 EETS service providers profiled, analysing:**
 - Strategic position
 - Service breakdown
- **The study is a strategic tool for service providers and toll chargers worldwide**
 - Effectively promote tolling as a funding mechanism
 - Defining and outlining a sound communication strategy
 - Lessons learned from best practices around the world
 - Learn how the competition for toll service provision will transform the ecosystem
 - The role of vehicle manufacturers, technology giants, fleet telematics providers and mobile wallets
- **Strategic recommendations to service providers**
 - Best practices for winning market share in future tolling markets
 - How to ensure control of the future toll payment interface
- **2015 - 2025 bottom-up market forecast**
 - Global scope: **40 countries investigated in details**
 - **Regional and global projections** of the toll and electronic toll market: toll revenues, subscription volumes, share of ETC, key influencing factors
 - 1,500-line Excel file with **subscription volumes by technology** and vehicle type, devices sold, total revenues collected and ETC only revenues collected

The study will answer the key strategic questions

What technology and model will be used in my geographical market in 2025?

What toll technology should I invest to future-proof my business?

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How is AliPay changing tolling in China?

Will new technologies help drivers accept tolling?

Who in the new value chain will own the end customer?

Will toll devices disappear?

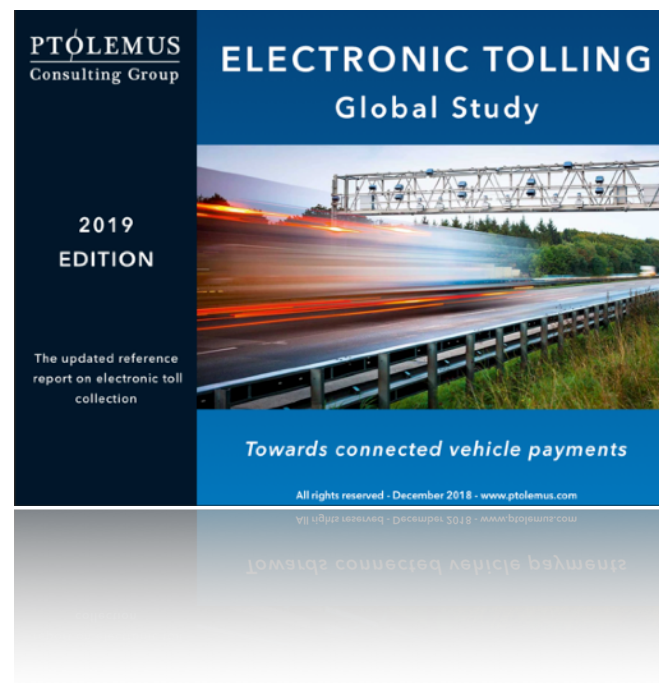
As competition explodes, how to gain market share in the future tolling market?

What is the impact of interoperability programmes on toll chargers and service providers?

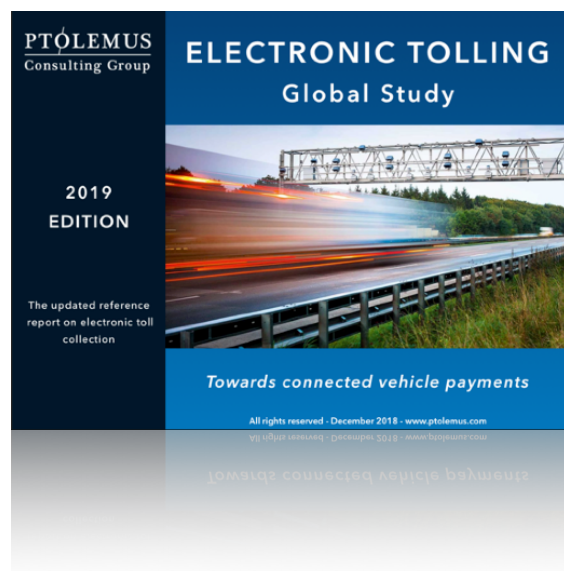
Will the tech giants take over toll payment processes?

Will OEMs manage customer interface and service delivery in the future?

To what extent smartphones will supplant existing tolling devices?



The study comes with a single, worldwide company licence



*The reference
report on ETC and
road user charging*

	Full Study		Additional market forecast	Additional workshop
	Buy direct (Invoice)	Buy online (Visa or MasterCard)		
Contents	<ul style="list-style-type: none"> • 750-page study with 40 country profiles, including qualitative, competitive and value chain analysis • Service provider best practices • Interoperability models analysis • Smartphone-based tolling model analysis • 12 profiles of EETS service providers 		<ul style="list-style-type: none"> • 1,500-line Excel file with outputs and charts • Estimates of the subscription volumes by technology and vehicle type • Devices sold, total revenues collected and ETC-only revenues 	<ul style="list-style-type: none"> • The full study presented to your board or strategy team • Half-day workshop at your office*
Company-wide licence	€ 5,995 Approx. \$6,445	€ 6,300 Approx. \$7,400	€ 2,000 Approx. \$2,350	€ 2,000 Approx. \$2,350
	E-mail us to request an invoice	Click here to purchase online		

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