Strategic Summary

***Course**: Real Project – Digitization WS2025/26*

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***Responsibility**: Market Analysis & Competitor Analysis& Research*

***Structure of this report**: A strategic summary for market and competitive report. This file references the provided Excel file **Market_Competition_Analysis_MoritzHoeltl.xlsx**.*

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Executive Summary

The Market Reality: The search for on-street parking is widely pain-pointed as the most inefficient, frustrating segment of urban mobility. Our analysis of the Market Environment reveals a critical imbalance in the DACH region, exemplified by the beachhead market Munich. With a vehicle density of 635 cars per 1,000 residents and only ~120,000 publicly usable spots for over 883,000 registered vehicles, the scarcity is acute. This results in an average of 50 hours wasted per year per driver, translating to an annual economic loss of approx. €1,092 per capita.

Competitive Landscape: The competitive analysis identifies a distinct functional gap between existing market players:

1. **Technological Gap (vs. Data Giants):** Incumbents like INRIX or Google rely on historical data and probabilistic algorithms. This creates a "weather forecast" scenario with high data latency**,** often leading users to occupied spots.
2. **Monetization Gap (vs. Community Rivals):** Direct competitors like TiPark fail to scale due to transactional friction. Their "Pay-per-Park" models impose a psychological barrier on every interaction, preventing the formation of critical mass.

The Solution: Deterministic Discovery OGAP positions itself as the missing **"**Discovery Layer**"** between Navigation (Google) and Payment (EasyPark) in Munich & Surroundings. By adapting the proven OOONO Logic (one-click community reporting) to the parking sector, OGAP replaces probabilistic guessing with deterministic facts.

- **Zero Latency:** Handshake-technology confirms spots the second they become free.
- **Zero Friction:** Instead of monetary barriers, a gamified credit system and data sharing, solving the "Chicken-and-Egg" problem.

Go-to-Market Strategy: To mitigate entry risks, OGAP employs a hyper-local Beachhead Strategy. The first launch focuses exclusively on high-pressure districts in Munich (e.g., Schwabing) to force local network effects. The strategy aims to achieve 10% of the Serviceable Obtainable Market (SOM) in the initial phase, generating an estimated annual revenue of ~€470k before scaling to other DACH metropolises.

Conclusion: The market analysis confirms that the technology for navigation and payment exists, but the solution for *finding* is missing. OGAP fills this void by shifting the paradigm from "paying for a spot" to "rewarding the finder," creating the first scalable, community-driven ecosystem for on-street parking.

Market Analysis: Key Takeaways

Massive Pain Point: Drivers in Germany waste 41 hours per year searching for parking, resulting in an economic loss of ~€1,092 per driver annually (Time, Fuel, Emissions). The problem is getting worse, with traffic volumes in Munich rising by 10% in 2024.

High-Pressure Beachhead (Munich): Munich creates the perfect storm for a solution. With 635 cars per 1,000 residents (Bavaria average) clashing with only ~120,000 publicly usable spots for over 880,000 registered cars, the scarcity is real and measurable.

Market Potential (The Numbers):

- **TAM (Total Addressable Market):** ~710k users in the initial scope (~€8.5M potential revenue).
- **SAM (Serviceable Available Market):** ~390k users (focus on mobility-savvy drivers).
- **SOM (Serviceable Obtainable Market):** We aim for ~39k users (10% market share) in the first phase, generating approx. €470k in annual revenue in the beachhead.

Competitive Analysis: Key Takeaways

The "Discovery Gap": The market is crowded with apps that help you *navigate* (Google) or *pay* (EasyPark), but almost no one helps you *find* the spot. This " Discovery Layer" is the strategic spot, OGAP occupies.

Competitor Weaknesses (Why they fail):

- **Data Giants (e.g., INRIX/Google):** Rely on probabilistic data (guessing based on history), leading to a data latency. They offer a "weather forecast" when users need "live facts" to search most efficiently for a parking spot.
- **Community Rivals (e.g., TiPark):** Fail due to transactional friction. Their Pay-per-Park models create psychological barriers ("Is this spot worth €2?"), preventing the formation of a critical mass.

The Winning Formula (USP): We combine the deterministic accuracy of a handshake feature (like TiPark) with the zero-friction model of a flatrate subscription (like Netflix). By adapting the OOONO-Logic, we are delivering live, spot-level parking information – in advance location-independent.

Strategy in the Market

OOONO logic applied to OGAP

The Blueprint (OOONO Logic): The OOONO success model relies on radical simplicity and community reciprocity: users warn each other of hazards (like speed traps) with a single button press to collectively avoid fines. By minimizing interaction barriers, this approach transforms the passive act of driving into an effortless data contribution habit that functions without complex financial transactions (Source: Expert interview with Heiko Albert Otto; https://ooono.com/de [accessed latest by 6 January 2026]).

The Application (OGAP Solution): OGAP transfers this mechanic to the parking sector by flipping the scenario from "avoiding a threat" to "seizing an opportunity" (finding a free spot). We replace the cumbersome data entry of competitors with an intuitive "report-on-departure" trigger, effectively removing technological barriers. Unlike rivals that rely on monetary friction (e.g., Pay-per-Park), we incentivize the community through a gamified "Give-to-Get" credit system that rewards solidarity. This approach solves the critical mass problem and establishes reporting as a natural, seamless habit within the Munich traffic flow.

Strategy Approach - From the perspective of a market expert

1. Analysis Synthesis: Our comprehensive analysis of the Market Environment and Competitive Landscape reveals a highly attractive entry point for OGAP:

- **Market Pressure:** With a vehicle density of 635 cars per 1,000 residents in Bavaria and an annual search time of ~50 hours per driver, the pain point in our target market (DACH) is severe. The trend (+10% traffic in Munich) confirms a growing urgency.
- **Competitive Void:** Despite a crowded market, our cluster analysis shows a functional gap. "Data Giants" (e.g., INRIX) suffer from latency due to probabilistic modeling, while "Payment Perfectionists" (e.g., EasyPark) only address the post-parking phase. Direct "Community Rivals" struggle with transactional friction and have no foothold in the DACH region.
- **Conclusion:** No player delivers real-time, deterministic parking discovery at the moment of need.

2. Positioning: The "Discovery Layer" - Based on these insights, OGAP positions itself not as a payment tool or general navigation app, but as the specialist for Search & Finding a spot.

- We transform the search process from a "probabilistic guess" (Competitor Standard) into a **"**deterministic retrieval**"** (OGAP Standard) by leveraging the community as a human sensor network.
- Unlike US-centric competitors (e.g., ParkSwap), we adapt the successful OOONO-logic to parking in europe: Low friction, high community engagement, and focus on the DACH cultural mindset.

3. Beachhead Strategy: To validate the model efficiently, we execute a hyper-local Beachhead Strategy in Munich before scaling nationally.

- Munich serves as the ideal lab environment due to the extreme gap between supply (120k public spots) and demand (880k+ registered cars).

4. Scaling Roadmap: Once the "Discovery Layer" is established in Munich, we intend to Roll-out to DACH cities with similar "Pain Profiles" (Hamburg, Berlin, Vienna).

Fictional Press Release (low fidelity pretotype)

OGAP ogap.app

Stop the Guessing Game: OGAP Brings the "OOONO Logic" to Munich's Parking Chaos

"Make Parking Simple. Find. Share."

www.ogap.app / hmmuenchen.ogap.app

Munich, January 8, 2026 – Five students from the Munich University of Applied Sciences (HM) are launching **OGAP**, an intelligent solution for one of the biggest urban problems: the search for a parking space. The self-developed app revolutionizes on-street parking through a community-based approach and real-time predictions. In doing so, the team is guided by the success principle of OOONO and has already secured the Danish company for a **strategic partnership** to rapidly scale the community. Following intensive market analysis and user surveys, OGAP is now entering the next phase: Fueled by a successful **€50,000 pre-seed financing** round, the MVP (Minimum Viable Product) is launching for commuters and residents in the greater Munich area to kickstart the **market entry**.

What it's about: The average driver in Munich spends around **50 hours** a year just looking for a parking spot. This costs not only time and nerves but causes an average loss of **€1,100** per year due to fuel and wear and tear – not to mention the unnecessary CO_2 pollution. While the number of registered vehicles in Munich has risen to over 883,000, public parking space remains scarce. This is exactly where **OGAP** comes in: A platform that makes vacating parking spaces visible in real-time, drastically reducing search traffic.

"We wanted to close the gap left open by navigation systems and parking garage apps: parking directly on the street. OGAP is designed to be as simple as possible: Find a spot, share it, done," says Moritz Höltl, Co-founder of **OGAP**. "Our vision is 'Make Parking Simple' – we want to take the daily stress out of the commuter's routine."

Why this matters: Many existing solutions (such as parking garages or B2B providers) only cover private or commercial parking spaces. However, over **70%** of drivers fight for public "on-street" spots daily. Competitors often focus on payment processes or vague zone data. OGAP, on the other hand, uses a community approach to deliver precise information at the parking spot level. This is particularly relevant for the more than **600,000 commuters** who stream into Munich daily and require flexibility that public transport often cannot offer during off-peak hours.

The team's preliminary studies showed that the demand is huge: Over **50%** of those surveyed are dissatisfied with the current parking situation. The "last-mile" search, in particular, causes frustration. The concept of OGAP is oriented towards users like "Anna Weber" (32, Project Manager), who depend on their car but have no time for long search loops. "An app that tells me where someone is leaving before I even turn into the street changes my whole morning," was the feedback from early user interviews.

Following the successful concept phase, **OGAP** celebrates the start of the pilot phase today: The app is now available to selected test users. Initial tests show that prediction accuracy increases significantly through community inputs ("I'm leaving now"). OGAP is therefore not just a navigation tool, but a tool for more efficient, stress-free, and eco-friendly urban mobility.

OGAP saves time, reduces emissions, and works through the power of the community. Interested parties can register for the Beta phase via our landing page immediately. Further features and collaborations with the city are being planned. Images and project data are available in the Media Kit.

Press Contact
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FAQ – Frequently Asked Questions

1) What exactly is OGAP? An app that simplifies the search for public parking spaces (On-Street Parking). It uses community data and algorithms to display free or soon-to-be-free parking gaps.

2) Is this just another navigation app? No. While Google Maps & Co. get you to your destination, OGAP handles the "last mile" of the parking search. We focus specifically on the availability of parking space at the curbside.

3) How does the prediction work? Through the community ("Social Parking"). Users report when they are leaving a parking spot ("Handshake"). Additionally, we use historical data to calculate probabilities for available spots.

4) Who is OGAP for? For everyone who relies on a car in metropolitan areas – especially commuters, residents in managed parking zones, and Young Professionals like our persona "Anna".

5) Where does OGAP work? At launch, the focus is on the Munich city area and heavily frequented districts (e.g., Schwabing, Maxvorstadt). Expansion to the surrounding area is planned. A major advantage is location independence.

6) How much does it cost? In the current phase, usage is free as we want to build the community. Later premium features for guaranteed predictions are conceivable.

7) How does OGAP differ from parking garage apps? Competitors often focus on paid parking garages (Off-Street). We solve the problem where it hurts the most: with free or affordable parking on the street.

8) Do I need to register? For active participation (reporting parking spots) and handshake actions, an account is required.

9) Does this really save CO_2? Yes. Those who circle the block less consume less fuel. With 50 hours of search traffic per year, there is enormous potential for savings here.

11) What happens if someone takes the spot before me? Since this is public space, we cannot reserve spots. However, the app displays the **probability** and **live reports** to maximize your chances.

12) How current is the data? As current as the community. The more users participate ("Share Free Parking"), the more precise the network becomes in real-time.

13) Is the app safe to use in traffic? Operation is designed for minimal distraction. We recommend setting the route before starting your journey or using voice output.

14) Data privacy & tracking? We use location data only to facilitate parking spots. Your movement profiles are not sold. Transparency is our top priority.

15) Contact for Press & Investors? Please contact us at press@ogap-parking.de or directly via our website for partnerships.

Press Contact
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