






MOVE – EVOLVE - TRANSFORM

CONNECTED VEHICLES
G. Leivaditis, Head of SIXT Division



MEGA TRENDS ●

CUSTOMERS

-  Democratization of ownership
-  Environmental consciousness
-  Game of thrones for generations

A CUSTOMER FOR EVERY COMPANY

- ✓ Sharing vs. ownership
- ✓ Spending appetite for green products
- ✓ Diversity in purchasing behavior

MEGA TRENDS ●

TECHNOLOGY

- 5G now and 6G by 2030 - fast and furious
- IOT, 46 billion devices are now interconnected
- Big Data capturing, storage & management
- Data Privacy issues
- Artificial Intelligence

TRANSFORMATION CATALYST



Autonomous cars, Robo Taxis, Flying cars
– **Innovation**



Millions of sensors, live traffic & vehicle
condition info - **Safety**



Smart cities, roads, transportation, fleet
management – **Productivity**

MEGA TRENDS ●

COVID-19

- ⚠ Disruption
- ⚠ Psychological distress
- ⚠ Crisis in production and supply chain
- ⚠ Change of focus and priorities

POST-PANDEMIC LEGACY

- 😊 Hybrid working – Online living –
Contactless mode
- 😊 Faster thinking process – **Evolution**
- 😊 Adaptation mode – **Transformation**

MEGA TRENDS ●

ECONOMY

- Wealth concentration and re-distribution challenge
- Inflationary era
- Supply prevails over demand
- Higher administrative control and measures

ECONOMY IS MOVING

- Electrification wave – **Promise to transform**
- Start up initiatives – **Investments and high valuations**
- Urban/City economy is gaining power and focus – **Evolution of micro-mobility**

VALUE CHAIN ●



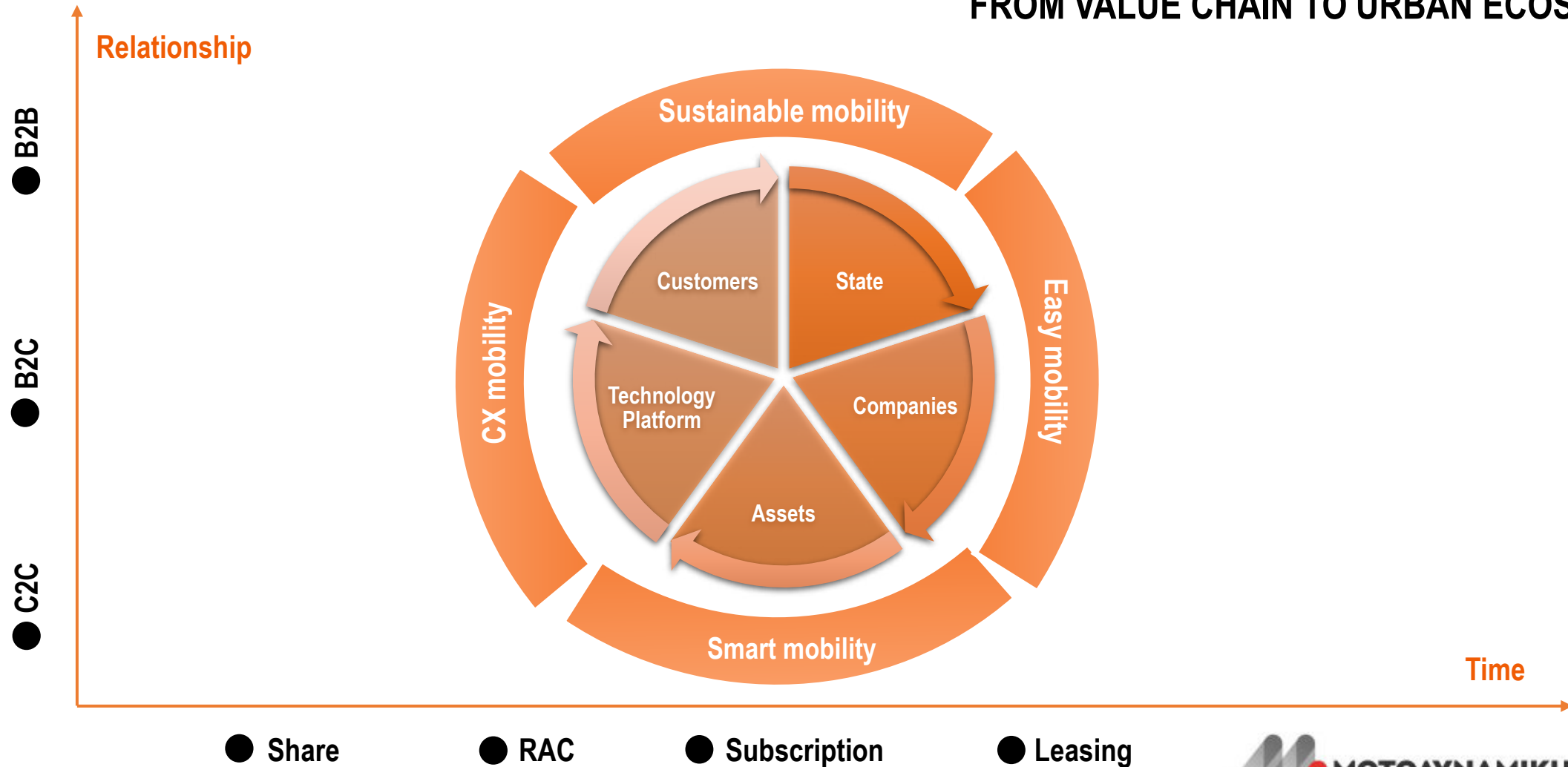
Source: BCG Analysis 2021

End to end mobility platform is the catalyst

Demand > Product > Service > Fleet > Tech. All customer touchpoints in one

MOBILITY ●

FROM VALUE CHAIN TO URBAN ECOSYSTEM



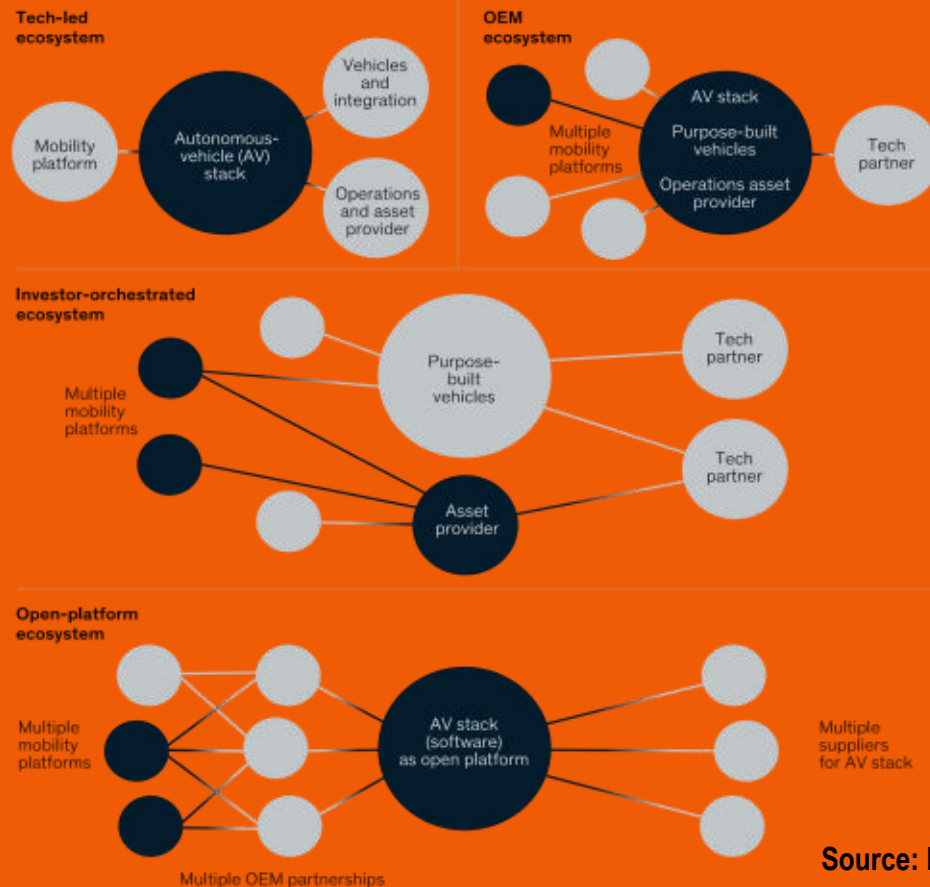
MOBILITY ●

MaaS ECOSYSTEMS

Several ecosystem archetypes are emerging to dominate the market.

Potential ecosystems

● Leading player in ecosystem



Source: McKinsey 2019

EVOLUTION OF ECOSYSTEMS

- ✓ Ecosystems diversity
- ✓ Technology is the King
- ✓ Service prevails over products
- ✓ Ease is the new Premium

KEY INSIGHTS ●

Ecosystems and business models

Shape, don't react

Drive innovation of new solutions even if they harm traditional business models

Allocate resources

Shift resources to new technologies

Partnerships

Share pain

Turn competitors into partners to share investment burdens and decrease risks

Team up to gain

Cooperate with technology leaders to explore new opportunities

Efficiency

Explore new technologies

Unlock new frontiers of profitability by actively exploring the potential of artificial intelligence

Attract new talent

Enhance talent pools to expand data – and technology-driven business models

Source: McKinsey 2019

THE SIXT WAY ●

Move - Evolve - Transform

2030 : 6,7 TN \$ expected mobility Market Value!

“Good is not good enough, better is expected” E. Sixt.

Forget about leasing, forget about renting... forget about subscriptions, **RE-INVENT** yourself!



Understand your customers & match with your company strengths



Embrace technology and data analytics



Choose your fights and be prepared for constant change & transformation

“If 5 years from now you are in the same business, then you will be out of business” P. Kotler



THANK YOU
G. Leivaditis, Head of SIXT Division

