

"How Green and Mobility make European Fleet Management Smarter"

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Complexity of Europe

- 745 million habitants
- 50 countries
- Over 35 languages
- 28 currencies
- 6 hours time difference

- European Union = 28 countries
- Euro in 19 countries
- 265 million passenger cars in European Union

- Over 14 million new passenger cars each year registrations
- Diesel = 50% in Europe
- Electric = only 1%
- CO₂ average new sold cars in European Union = 118 g/km

- **No One Size Fits All** with a continent that is a puzzle, a patchwork of countries and cultures

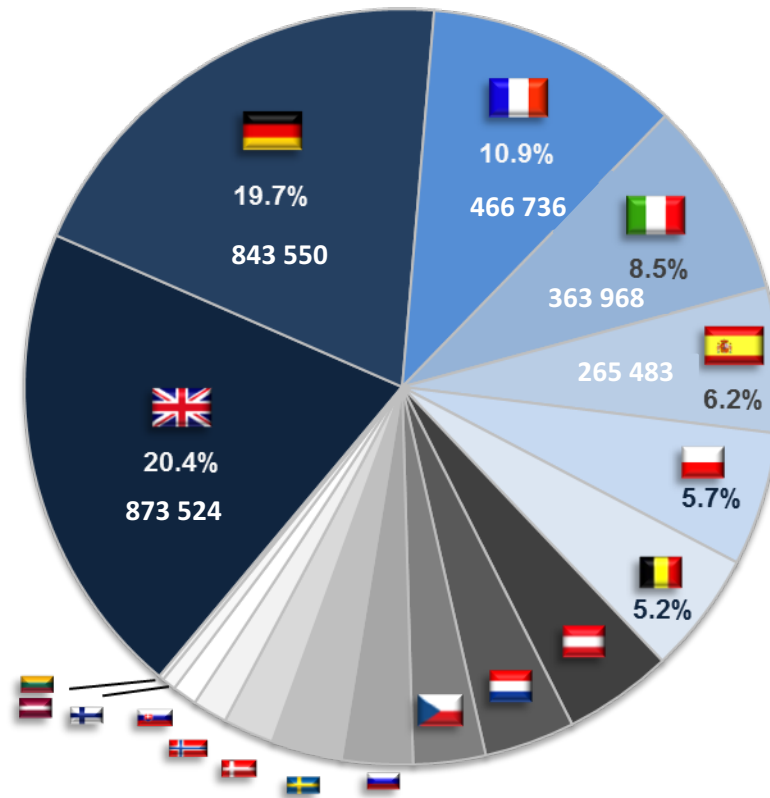


1. The EU Fleet Market in 2017

True Fleet Market in Europe is dominated by Big 5



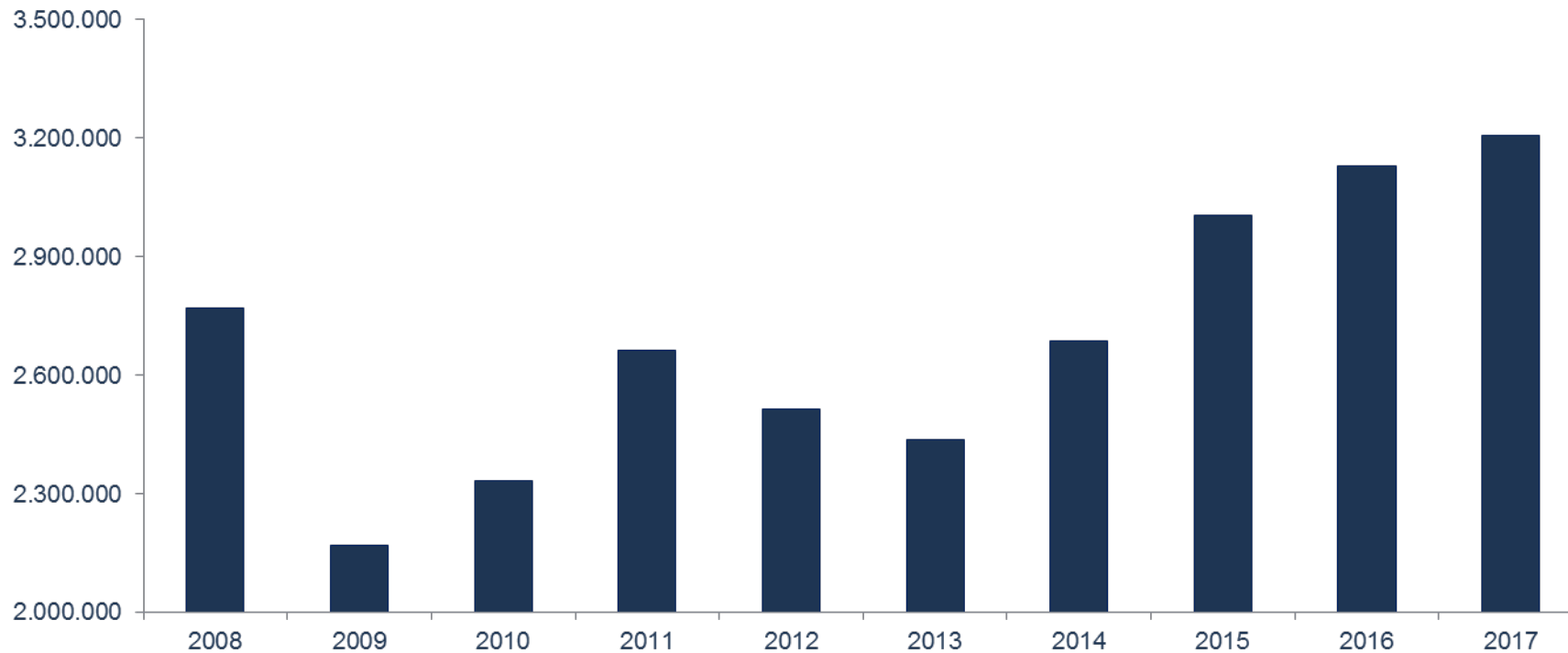
Top-7:
3.28
million
= 76.6%



Source : Dataforce, 2018

1. The Fleet Market in 2017

New Car Registration - True Fleets 2008-2017 in EU-7

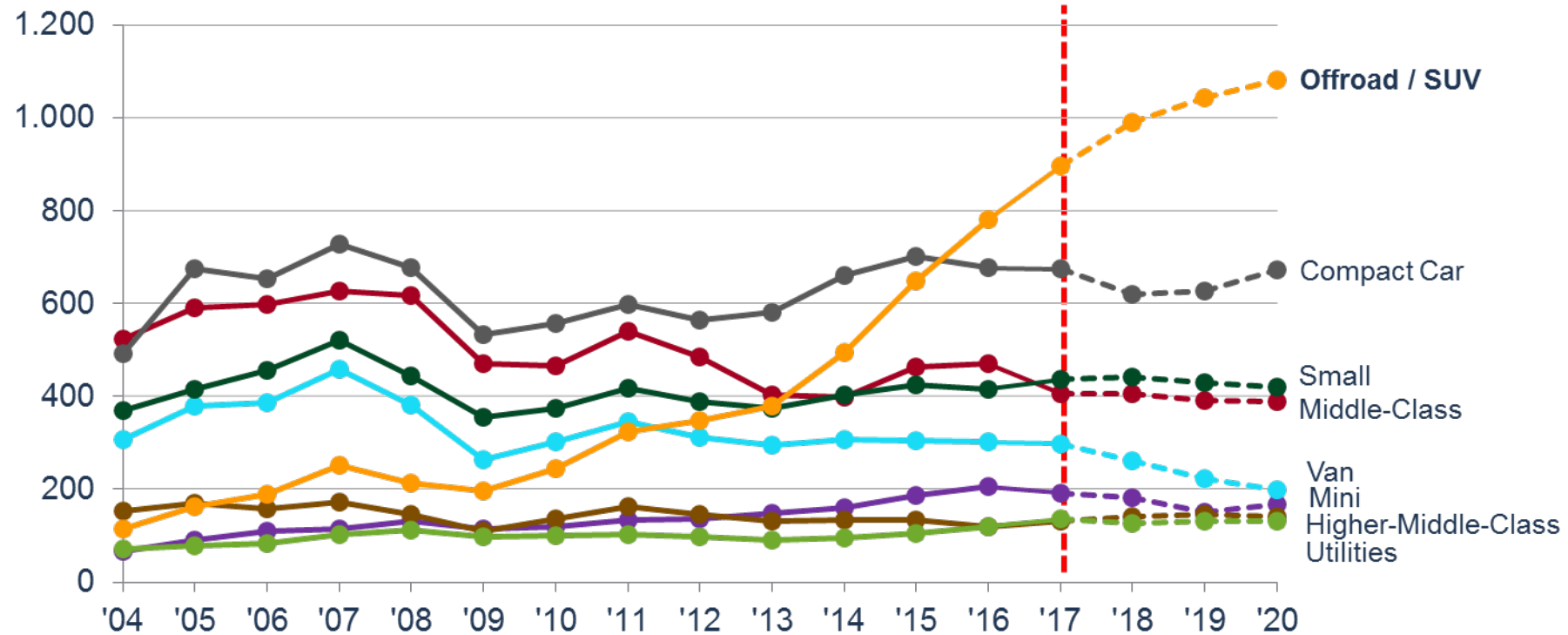


Source : Dataforce, 2018

1. The Fleet Market – The rise of the SUV in EU

SUV boom keeps up the momentum

New Car Registrations in the True Fleet Market (thousands)



1. The Fleet Market – Volkswagen Group still dominates

Top 10 True Fleet Vehicles for 2016 in European Union

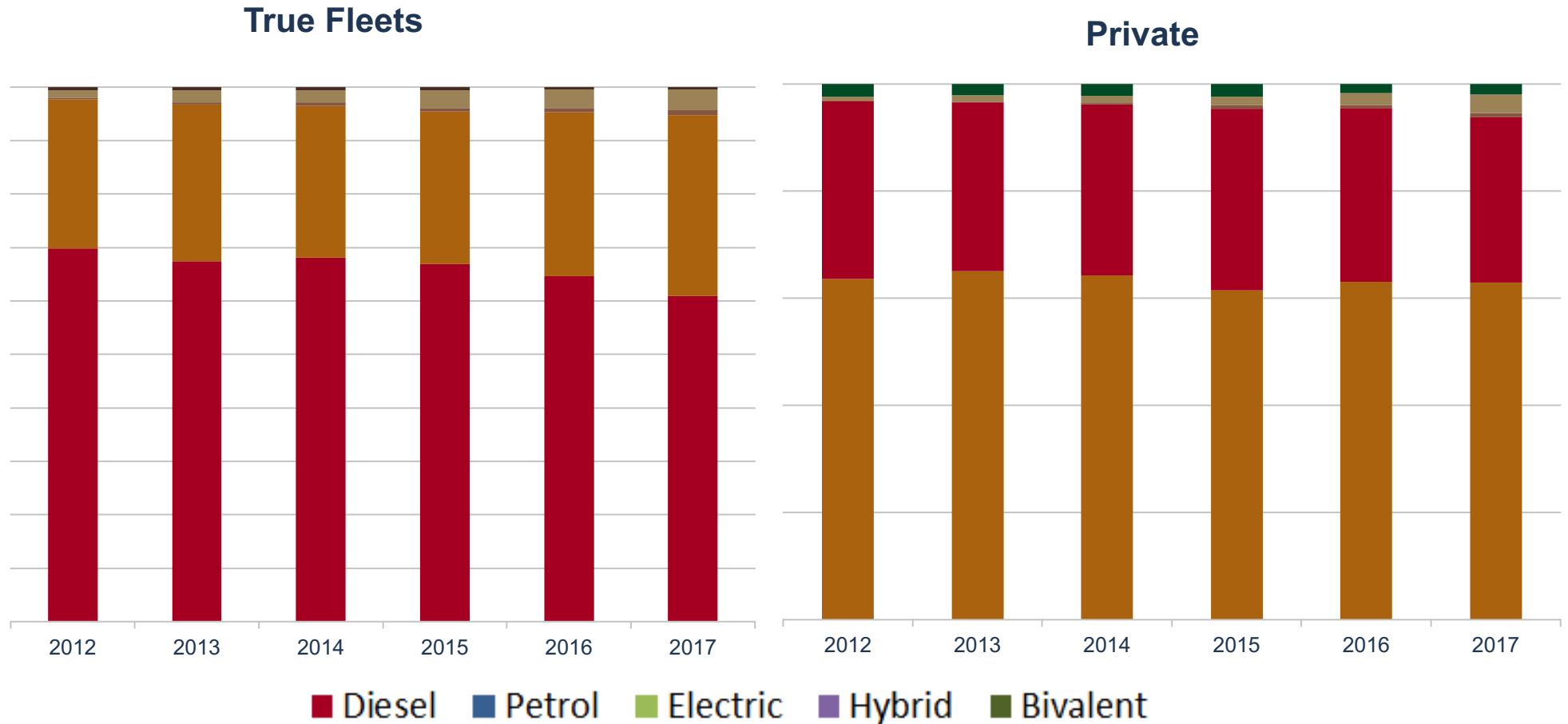
1. Volkswagen Golf
2. Volkswagen Passat
3. Skoda Octavia
4. Audi A4 / S4
5. Opel Astra
6. Renault Clio
7. Nissan Qashqai
8. BMW 3 Series
9. Peugeot 308
10. Mercedes C-Class



Source : Dataforce, 2017

1. The Fleet Market – Diesel still King but

Fuel Evolution in European Union



Source : Dataforce, 2017

2. Funding and Financing

>8,5 million cars in operational leasing

- **50%** is owned by the **Top 5** of the multibrand lessors



2. Funding and Financing

Why is operational leasing so popular



Cost & Risk Management:

- VAT & Accounting
- No RV risk
- Profit from discounts

Budget Control:

- Cost known in advance
- Driver management
- Reports

Focus on Core Business:

- Time
- Money
- Mobility of employees
- Repair & maintenance

2. Funding and Financing: The future

- Bigger discrepancy between international players and local heroes
- Opportunities for captive lease companies
- Legislative impact – IFRS16 from 2019
- Flexible lease and outsource solutions

3. Taxation... steers fleet management



**Greenification via taxation still gains popularity.
20 European Member States apply CO2 taxation.**



3. Taxation... will become even greener than before



**By 2030 one in three cars
will be an EV or plug-in hybrid in Europe.**



3. Legislation...Local Green pressure is rising

Paris intends to remove diesel vehicles from its streets entirely by 2025.

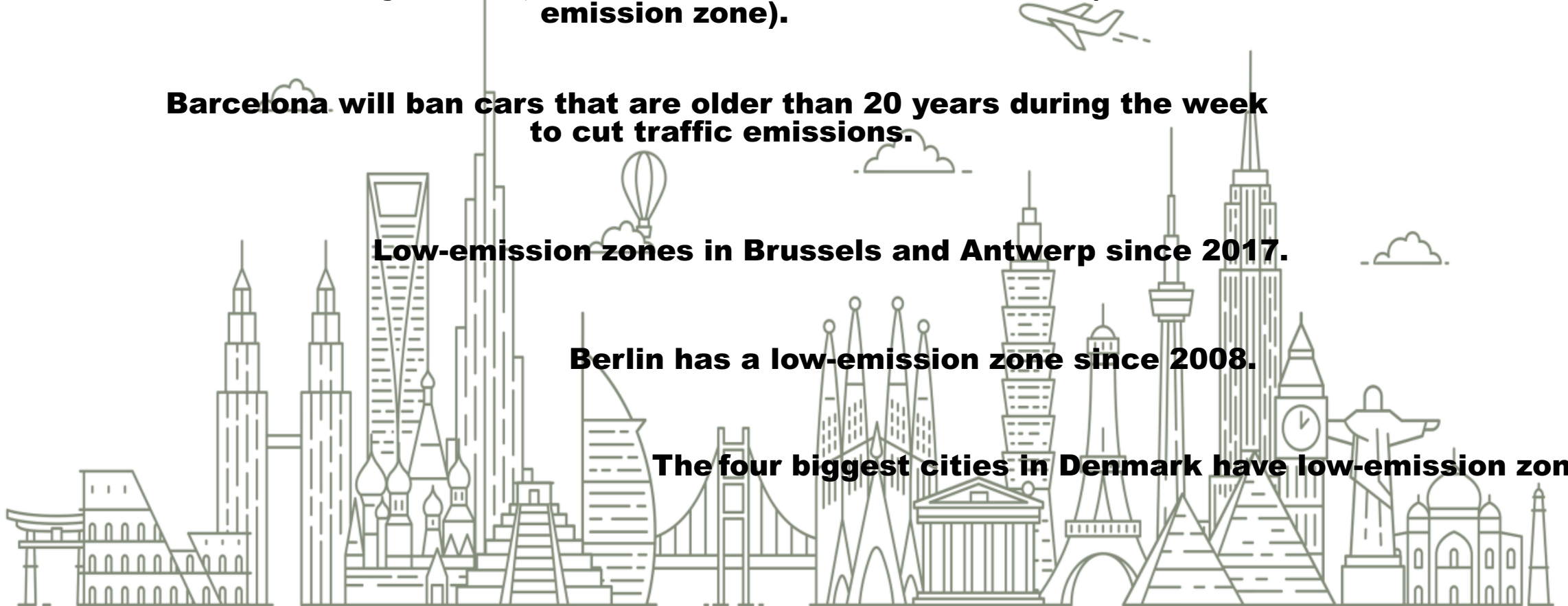
London has already its LEZ, but from 2019 it will add an ULEZ (ultra low emission zone).

Barcelona will ban cars that are older than 20 years during the week to cut traffic emissions.

Low-emission zones in Brussels and Antwerp since 2017.

Berlin has a low-emission zone since 2008.

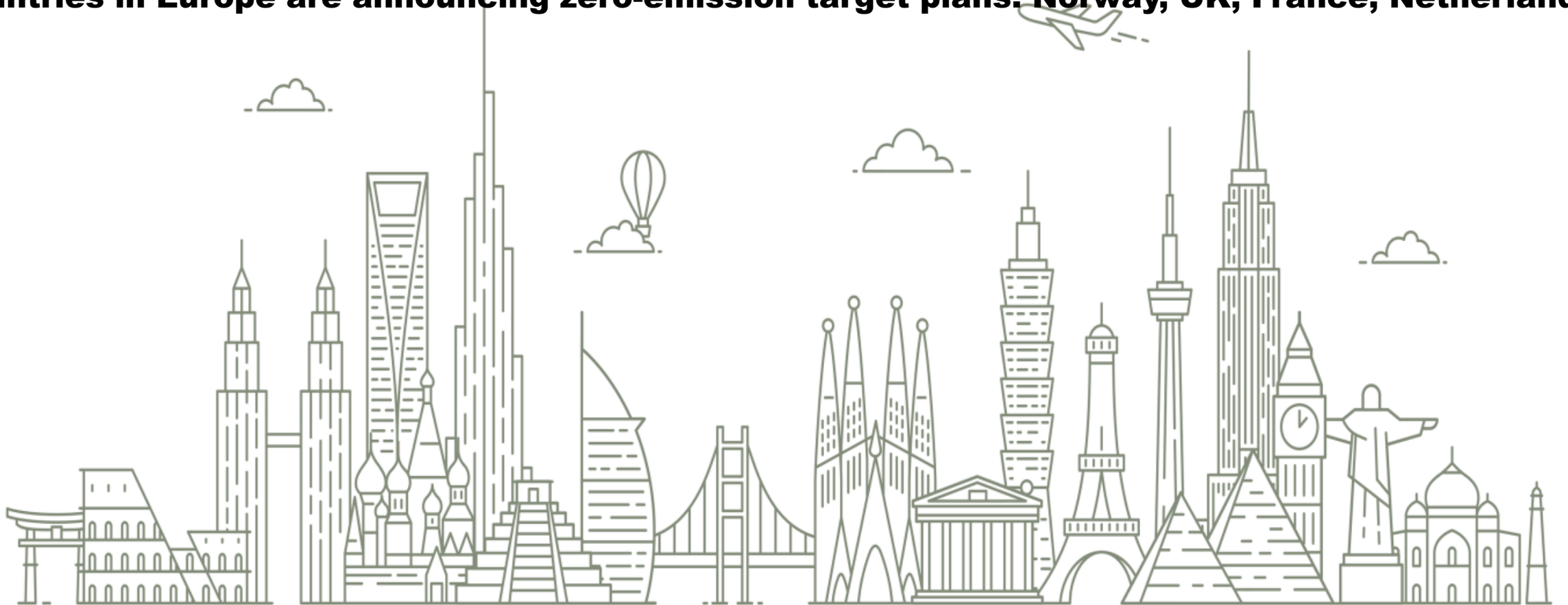
The four biggest cities in Denmark have low-emission zones.



3. Legislation...Local Green pressure will continue to rise

Over 200 different urban access regulations are already in place across Europe.

Countries in Europe are announcing zero-emission target plans: Norway, UK, France, Netherlands.



3. Taxation... steers green fleet management

- **Greenification all over in today's fleet programmes**
 - Fleet Europe Awards' finalists - Everyone focuses on Green
 - HSE consciousness rising - initiatives like EV100 with Unilever, Vattenfall, IKEA and LeasePlan to go for fleet electrification in upcoming years and zero-emission mobility by 2030.

4. From Fleet to Mobility

Influencers for Mobility

- Urbanisation
- Technology
- Consumer behaviour
- Millennials
- Legislation
- ...

Suppliers looking for new business opportunities with new services

From Fleet to Mobility

- Suppliers offering services that are **no longer only car-centric but user-centric**
 - shared mobility
 - multi-modal mobility
 - B2E and B2C scope with private lease
- **New players and start-ups** are entering the corporate fleet and mobility environment with disruptive services
- **Success factors:** Flexibility and User-friendliness

Mobility will grow internationally

- **Implementation still locally driven** due to taxation and offer
 - Examples : Bike in Denmark; car-sharing in France ; salary sacrifice in UK ; private lease in Netherlands ; Cash4car in Belgium, ...
- **Internationalisation** = pilots becomes products and get implemented across Europe and beyond : China, Brazil, Mexico, Russia
- So **also in Mobility** : one size doesn't fit all => **Think global but act local**

Until today: The Fleet Manager

- LEASING & FLEET MANAGEMENT COMPANIES

- OEM's



FLEET MANAGERS



From tomorrow: The Mobility Architect

LEASING & FLEET MANAGEMENT COMPANIES

OEM's



GLOBAL CORPORATE MOBILITY ARCHITECT



EMPLOYEES



MOBLITY PLAYERS & START-UPS



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- Global Fleet
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