RENTAL SUMMIT 2026

TODAY'S SCHEDULE

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13:00	Carole Bachmann | European Rental Association The TCO Alliance: Navigating the Market Challenges Together
13:20	Neil Bravery | Hire Association Europe The importance of Longevity: Why high Fleet Maintenance Cost is killing your Profit
13:40	Frederic Lietaer | ELIET The Architecture of Savings: Why Flexible Machine Design is Key to Cutting Cost
14:00	Coffee Break
14:30	Harald Schreibmüller | HAINZL Motion & Drives The TCO Effect: How Selecting the Right Components Multiplies Value
14:50	David Frank | Briggs & Stratton | Vanguard The Dual-Track Fleet: Why Fleet Viability Demands a Parallel Strategy
15:10	John Smeets | Boels Rental From Cost to Value: Mastering the Rental Lifecycle
15:30	Conclusion + Q&A
16:00	Coffee Break
16:30	Airport Tour & Transition to Dinner

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Welcome & Introduction

Sjoerd van de Velde
Managing Director EMEA
Briggs & Stratton

WELCOME TO FRANKFURT

RENTAL SUMMIT2026

Beyond the Price Tag - Powering the Future of Rental

- From CapEx to Long-Term Yield
- Total Cost of Ownership (TCO) as Profitability Shield
- Initial Price Tag vs. True Lifecycle Value
- Modularity & Data-Driven Fleet Insights
- Navigating Regulatory Pressures & Energy Costs
- Cross-Industry Alignment & Action

FACTS & FIGURES

- 90 industry experts
- 16 countries
- 43 companies & organisations
- 3 media representatives
- 23 applications

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TODAY'S SPEAKERS

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Carole Bachmann
Secretary General
European Rental Association

The TCO Alliance:
Navigating the Market Challenges Together

Neil Bravery
Commercial Director
Hire Association Europe

The Importance of Longevity:
Why High Fleet Maintenance Cost is Killing Your Profit

Frederic Litaer
Chief Executive Officer
Eliet

The Architecture of Savings:
Why Flexible Machine Design is Key to Cutting Cost

Harald Schreibmüller
Head of Sales
Hainzl Motion & Drives

The TCO Effect:
How Selecting the Right Components Multiplies Value

David Frank
SVP & President of Electrification
Briggs & Stratton | Vanguard

The Dual-Track Fleet:
Why Fleet Viability Demands a Parallel Strategy

John Smeets
Director Fleet Uptime
Compliance & Excellence
Boels Rental

From Cost to Value:
Mastering the Rental Lifecycle

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HAINZL MOTION & DRIVES

INTERNATIONAL rental NEWS

khl

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The TCO Alliance: Navigating the Market Challenges Together

Carole Bachmann
Secretary General

EUROPEAN RENTAL ASSOCIATION

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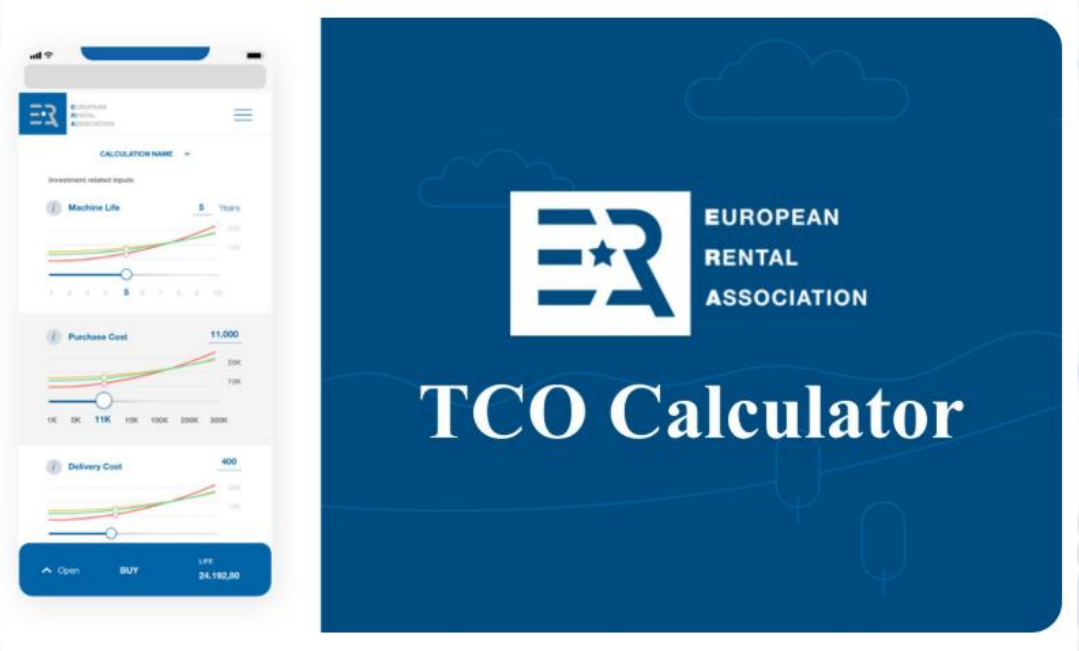
AGENDA

TCO is important for the industry's transition to lower-emission equipment.
It is no longer only a calculation.
It can become a common language for the rental industry.

1. Why TCO matters now
2. ERA's experience with TCO
3. What the energy transition changes
4. What the updated calculator will contain
5. Why collaboration and data are essential
6. Where the project is going



FROM COST CALCULATION TO STRATEGIC DECISION-MAKING

The energy transition is not only a technology change. It changes cost structures, investment decisions, customer conversations and business models.

Rental has always been based on:

- better asset utilisation,
- professional maintenance,
- lifecycle thinking.

Low-emission equipment creates new questions:

- different investment and operating costs,
- energy logistics,
- maintenance requirements,
- utilisation patterns,
- resale assumptions.

TCO BECOMES ESSENTIAL TO IDENTIFY THE RIGHT SOLUTION FOR THE RIGHT USE CASE.

ERA HAS BEEN WORKING ON TCO FOR MORE THAN A DECADE

The ERA TCO Calculator was created to help compare the total cost of using equipment when rented, purchased or leased. The current update builds on that legacy, rather than replacing it.

Original ERA TCO Calculator:

- comparison between rent, buy and lease
- originally developed under the Promotion Committee
- made freely available as an industry tool

Updated ERA TCO Calculator:

- closely linked to energy transition and equipment technology
- moving to the Technical Committee
- building on the existing tool

THE ENERGY TRANSITION CHANGES THE TCO EQUATION

Traditional TCO models do not fully capture the reality of electric and low-emission equipment.

Energy costs depend on:

- the source,
- the location,
- the supply method.

Refuelling and charging logistics can be specific to each project.

Maintenance profiles differ between diesel and electric machines.

Different machine categories have different use and cost profiles.

Reliable comparisons require credible, real-world assumptions.

FOCUS ON IMPORTANT AND SUFFICIENTLY RELIABLE ELEMENTS
VS. VERY LARGE NUMBER OF FACTORS.

UPDATING THE ERA TCO CALCULATOR: WHAT NEEDS TO BE ADDED

ERA wants the Calculator to remain simple and practical, while reflecting the evolving realities of equipment rental.

- Retain the existing rent, buy and lease functions
- Enable direct comparisons between traditional and electric equipment within the same equipment category
- Rebuild the calculator on a modern, secure and future-ready platform
- Add maintenance-cost differences for electric machine
- Integrate refuelling and charging logistics into the calculation
- Define relevant new equipment categories
- Rebuild the platform with a more modern and user-friendly interface
- Use a member survey to establish credible baseline assumptions

EVERY ADDITIONAL PARAMETER MUST ADD MORE VALUE THAN COMPLEXITY.
WE WANT TO PROVIDE BETTER ANSWERS, NOT MORE COMPLEXITY.

THE TCO ALLIANCE

No single stakeholder has the full picture.

- Rental companies contribute operating and maintenance experience.
- OEMs contribute technical performance data.
- ERA provides a neutral framework and shared methodology.
- The member survey will create credible baseline assumptions.
- Additional data sources may support future development.

THE CREDIBILITY OF THE TOOL DEPENDS ON THE QUALITY OF THE METHODOLOGY AND THE WILLINGNESS OF THE STAKEHOLDERS TO CONTRIBUTE.

FROM CALCULATION TOOL TO COMMON INDUSTRY LANGUAGE

ERA wants to deliver a credible tool that the industry will actually use.

FIRST PHASE

- Collect baseline information through an ERA member survey.
- Rebuild the existing calculator on a modern, user-friendly platform.
- Introduce direct electric versus traditional equipment comparisons.
- Add maintenance and energy-logistics assumptions.
- Support investment decisions, customer dialogue, training and advocacy.

BUILDING FOR THE FUTURE

- Add further functionality progressively, without compromising ease of use.
- Potential developments include more sophisticated residual-value modelling, carbon pricing, dynamic energy costs and additional energy sources.
- Create a flexible foundation that can evolve with technologies, regulations and market needs.

GUIDING PRINCIPLE: ADD SOPHISTICATION PROGRESSIVELY, WITHOUT COMPROMISING EASE OF USE.

CONCLUSION

ERA has a responsibility to help the industry overcome the barriers to lower-emission equipment.

Make the full value equation visible

Not favouring one technology
Making the economic case clear
Providing credible information for customers and practical comparisons for rental companies

The updated TCO Calculator: a common language for confident decisions

Together, we can use that common language to remove uncertainty and accelerate the transition to lower-emission equipment.

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The Importance of Longevity: Why High Fleet Maintenance Cost is Killing Your Profit

Neil Bravery
Commercial Director

HIRE ASSOCIATION EUROPE

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THE MONEY IS IN THE METAL

A strong asset register made up of quality machinery equals revenue and customer loyalty.

01
What makes an asset a good asset?

02
The lifecycle of an asset

03
Maintenance costs over the life cycle

04
Buy cheap buy twice

05
Depreciation & Net Book Value / Market Value

06
Summary

WHAT IS A GOOD ASSET?

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Core Objectives: Maximize Utilization • Minimize Total Cost of Ownership (TCO) • Generate High ROI

1. High Financial Return (ROI)

Short Payback Period

The asset generates enough rental revenue to quickly recover its initial purchase price.

Strong Rental Demand

High market popularity ensuring the equipment spends minimal time sitting idle in the yard.

Resilient Resale Value

The equipment maintains a strong residual market value at disposal.

2. High Reliability & Durability

Low Breakdowns

Built to withstand heavy, repetitive use by inexperienced or rough users on busy worksites.

Minimal Downtime

High-quality manufacturing prevents early mechanical failure, keeping customers trusting.

Extended Service Life

Capable of remaining safely operational over many years before requiring replacement.

3. Ease of Maintenance

Accessible Parts

Spare components are affordable and easy to source quickly, preventing fleet delays.

Simple Mechanics

Quick to clean, inspect, and service between hire periods to maximize turnaround speeds.

Standardised Fleet

Matching equipment makes diagnostic training and spare parts inventory highly efficient.

TCO–THE LIFECYCLE OF THE ASSET

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01

Acquisition & Fleet Integration

Procurement, asset tagging, safety certification

02

Operational Hire Phase

On hire, test & run, service

03

Preventative Maintenance

Timed service schedule

04

Mid-Life Refurbishment

Cosmetic refresh, investment to meet overall ROI

05

Decommissioning & Disposal

Retire from fleet, NBV vs market value or scrap

BUY CHEAP BUY TWICE!

The Hidden Costs of Cheap Tools

- Premature Failure: Cheap tools hit their "mid-life crisis" in months rather than years.
- No Parts Support: Budget brands rarely support spare parts; a £10 broken switch can force you to scrap a £200 machine.
- Voided Warranties: Comes with consumer-grade terms that are completely voided the moment tools are used for commercial hire.
- Workshop Backlogs & Labour: Mechanics waste valuable hours repairing low-margin tools instead of servicing heavy, high-margin equipment.
- Turnaround Delays: High breakdown rates keep tools stuck in the ‘service’, thereby reducing fleet utilisation rates.

The Solution: Buy Premium

- Buy Premium: Investing in robust, high-tier brands shifts the lifecycle from constant maintenance to reliable revenue generation.
- High Residual Value: Premium brands (Hilti, Makita, Kubota, Stihl) hold incredible value, often recovering 30–40% at auction after 3–5 years.
- Standardised Fleet Savings: Matching models streamline diagnostics, simplify training, and require only a small inventory of universal spare parts.
- Maximized Utilisation: Keeps tools active in the "ready for hire" bay, significantly improving lifetime ROI and customer trust.

WHY HIGH FLEET MAINTENANCE COSTS KILL PROFITS

High tool fleet maintenance costs directly destroy profitability by creating a compound financial leak.

1. The Loss in Revenue

- **Zero-Earning Assets**

Broken tools sitting in the repair bay cannot be rented out, driving down utilization and cutting off primary revenue.

- **Labour Cost Inflation**

Mechanics spend costly workshop hours repairing low-margin, cheap tools, completely destroying lifetime ROI.

2. Operational Overhead

- **Logistics & Transport Waste**

On-site breakdowns force unbillable transport expenses for fuel, vehicles, and drivers to deliver replacements.

- **Inflated Inventory Costs**

Frequent breakdowns tie up vital cash flow in maintaining a massive, diverse inventory of spare parts.

3. Customer Lifetime Value

- **Site Delays & Brand Damage**

Equipment failures delay projects. Angry clients blame the hire company, cancel contracts, and post negative reviews.

- **The Discount Drain**

Staff routinely issue refunds, waive hire fees, or offer deep discounts to appease customers, wiping out profit margins.

NET BOOK VALUE VS MARKET VALUE – END OF LIFECYCLE

Net Book Value (NBV)

Determined By
Your accounting policy (straight-line depreciation)

Predictability
100% predictable; drops steadily over time

Reflects Abuse / Condition?
No — purely theoretical math model

Primary Use
Tax calculations and official financial reporting

Market Value (MV)

Determined By
Real-world supply, demand, and physical condition

Predictability
Variable; fluctuates dynamically based on market trends

Reflects Abuse / Condition?
Yes — directly impacts auction and sale price

Primary Use
Fleet disposal strategies and capital asset realization

SUMMARY RECOMMENDATIONS

1. Fleet & Quality

- **Invest in Quality**

Invest in your fleet; high-quality equipment directly drives and builds customer loyalty.

- **Avoid Cheap Assets**

Don't buy cheap; low-cost alternatives often result in higher maintenance costs over time.

2. Asset Management

- **Standardise Brands**

Standardise brands across your depot network where possible to streamline fleet operations.

- **Defined Lifecycle**

Have a clearly defined lifecycle of asset groups to understand exactly when to replace them.

3. Maintenance & Resale

- **Proactive Care**

Keep on top of fleet maintenance and refurbishment and invest in training your mechanics.

- **Market Awareness**

Understand market trends for used machinery to optimize disposal and residual value realization.

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The Architecture of Savings: Why Flexible Machine Design is Key to Cutting Cost

Frederic Lietaer
CEO

ELIET®

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WHO IS ELIET

- Belgian manufacturer since 1984
- Founder Emiel Lietaer
- R&D and production site in Belgium
- 40 products, specialised in 3 product areas
- Export worldwide to 44 countries
- Mission: To be the reference in our market

Emiel Lietaer

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MARKET EVOLUTION

Changing environment: Combustion vs Electric

What drives real product evolution: R&D or Customer ?

Challenges for product development:

- Timing to market
- Volume
- Customer Requirements
- Continuous technical evolution

Solution: Modular Product Design

Win - Win - Win:

- R&D: Limiting development cost
- Production: Economy of scale, Flexibility
- Customer: Can experiment on TCO

MODULAR PRODUCT DESIGN

by ECL ELIET CREATIVE LAB

Project name : ELIET PROF 6

KEY FEATURES :

Product:	Green Waste Shredder
Capacity:	10 cm
Feeding:	Hydraulic infeed roller
Technology:	State of the art

4 SEASON shredder™

CHOPPING PRINCIPLE trademark

TURBO DISCHARGE

ABM SYSTEM ELIET

ECO EYE SYSTEM™

fast pitstop

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MODULAR FLEXIBILITY

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POWER OPTION

Vanguard 14 HP

Vanguard 18 HP

ePOWER

Vanguard 7 KW

PTO

MOBILITY OPTION

On Wheels

Cross Country

On Road

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SIMULATION

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PROF 6 ON WHEELS		VANGUARD 14HP	VANGUARD 18HP	E VANGUARD 7kW
COST				
CAPEX		€ 10.714	€ 12.701	€ 23.965
COST OF SERVICE		€ 16.562	€ 17.325	€ 13.734
COST OF POWER	*0,26 €/kWh → 7 kW = 1,82 €*	€ -	€ -	€ 1.365
TOTAL COST OF OWNERSHIP (1500 H)		**€ 27.276**	**€ 30.026**	**€ 39.063**
REVENUE				
	Rental rate	**€ 130**	**€ 150**	**€ 140**
REVENUE FROM RENTAL	*750 sessions*	€ 97.500	€ 112.500	€ 105.000
REVENUE FROM POWER	*consumption 3,5L/h = 7 €*	€ -	€ -	€ 5.250
TOTAL REVENUE		**€ 97.500**	**€ 112.500**	**€ 110.250**
NET INCOME		**€ 70.223**	**€ 82.473**	**€71.186**

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The TCO Effect:
How Selecting the Right Components Multiplies Value

Harald Schreibmüller
Head of Sales

HAINZL
MOTION & DRIVES

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THE TCO EFFECT

The real cost of a component is revealed over its lifecycle

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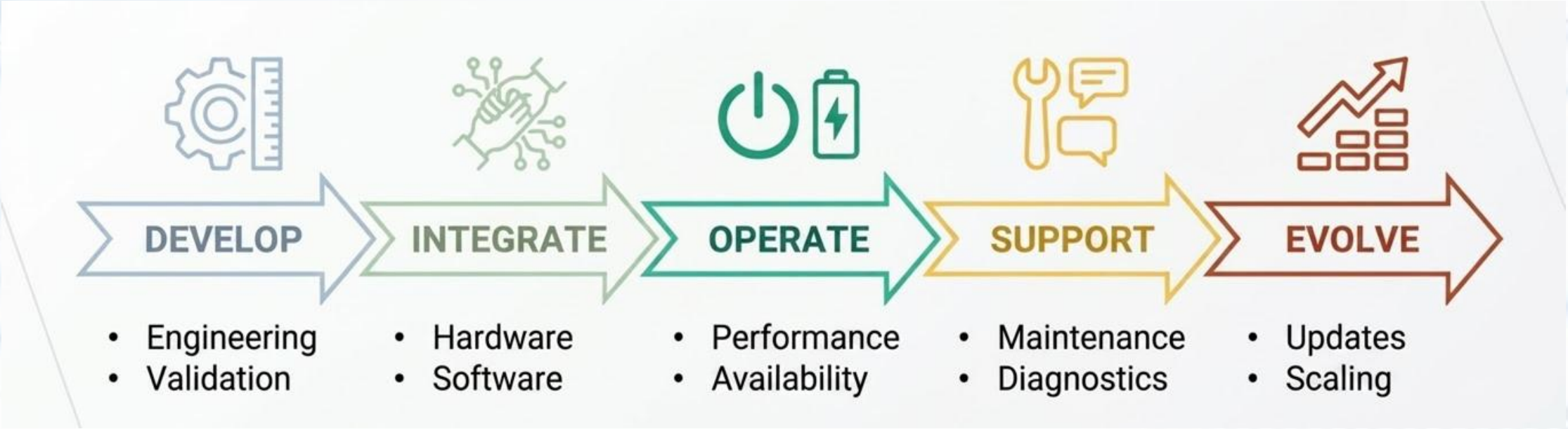
BEYOND PRICE

TCO is calculated by finance, but shaped by engineering



TCO = Initial Cost + Lifecycle Cost + Operational Risk

INTEGRATED VALUE

Turning component quality into lasting lifecycle value

PREMIUM TECHNOLOGY PARTNERS → SYSTEM INTEGRATION HAINZL → LIFECYCLE VALUE

Lifecycle Value

- Reliable
- Safe
- Serviceable
- Scalable

HAINZL MOTION & DRIVES

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MOTIC CargoBeast

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TC

Control and communication
- **Coordinated HMI** and **electronics**
- Secure telematics and connectivity

Energy Storage
- **Capacity and power**
  → fewer interruptions

Diagnostics and service
- Predictive maintenance support
- Rapid fault location

Drive System
- **Controlled performance**
  → reduced component stress

Safety functions
- **Integrated** crash structures
- Active assistance systems

Diagnostics
- **System transparency**
  → faster troubleshooting

Mechanical Integration
- **Integrated protection**
  → lower operational risk

One vehicle. Multiple technologies. One integrated system.

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HAINZL MOTION & DRIVES

ENSURE MAXIMUM OPERATING TIME

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VANGUARD Fi3.5 vs. Standard Cargo-bike battery

2.4× PERFORMANCE

- **2.4× nominal energy per pack** (3.5 kWh vs. 1.44 kWh). Greater operating range and fewer charging interruptions.
- **2.2× continuous current capability** (134 A vs. 60 A). Power reserve for payload, acceleration and gradients.

2.2× AVAILABILITY

- **up to 2,000 cycles** to 80% initial capacity. Designed for intensive commercial operation.
- **no scheduled maintenance.** Less service effort, more predictable availability.

2,000 LIFECYCLE CONTROL

- **BMS and CAN J1939.** Monitoring, diagnostics and system communication.
- **commercial-grade system and support.** Rugged enclosure, application support, worldwide availability.

Comparison with Tritek TP6068 based on published specifications.

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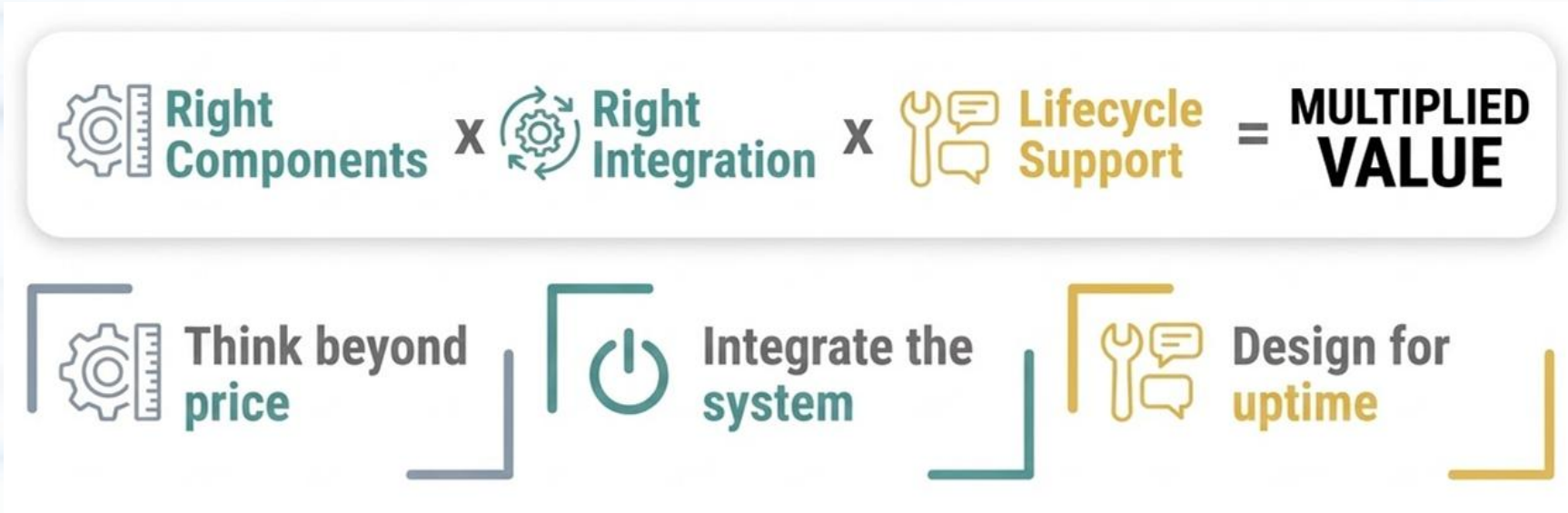
Not just more energy. More time on the job.

HAINZL MOTION & DRIVES

THE TCO EFFECT

The cheapest component may win the purchase order...



The right system wins the lifecycle

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The Dual-Track Fleet: Why Fleet Viability Demands a Parallel Strategy

David Frank
SVP & President of Electrification

BRIGGS&STRATTON VANGUARD

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MARKET DEMAND

Regulatory Pressure

507 LEZ500+ European cities / 507 Low-Emission Zones*

Strict European Union zero-emission directives, municipal low-emission zones, and corporate ESG mandates are rapidly rendering internal combustion fleets obsolete for urban construction and indoor maintenance.

Total Cost of Ownership

41% Loss
Construction/Technician workforce retiring by 2031**

Accelerating demographic retirements paired with declining entry-level frontline. Organizations must navigate severe recruiting constraints, rising wage premiums, and an acute loss of legacy institutional knowledge.

Safety

New guidelines mandate actionable thresholds for heat-stress prevention, hydration breaks, and preventative controls on repetitive heavy lifting. Verification of occupational health indicators and auditable safety incident metrics.

Technology

Up to 2x (80–100%) higher billable asset utilization.

Electric equipment transitions machinery from a pure tool into an all-in-one solution. Rental operators who electrify early capture higher daily yields, double equipment utilization rates, and secure multi-year municipal contracts.

*Figure projected by the *Clean Cities Campaign* (up from 320 in 2022) alongside the binding **2030 municipal Zero-Emission Zone (ZEZ)** construction site compliance deadlines across major hubs (Paris, London, Amsterdam).
** *McKinsey / NCCER*
*** European Rental Association (ERA) and OEM telematics benchmarks

REGULATORY PRESSURE

Engine

Escalating Restrictions • Compliance Liabilities

Emission Standards	Strict EPA Phase 3 & Euro VII
Urban Route Access	Zero-Emission Zone Bans
Fiscal Penalties	Rising Carbon Taxes & Tariffs
Fleet Valuation	High Stranded Asset Risk

Battery

Statutory Subsidies • Mandate Protection

Purchase Incentives	Tax Credits
Urban Route Access	Unrestricted Core Freight Entry
Corporate Mandates	100% Scope 1 Decarbonization
Depot Infrastructure	Utility Make-Ready Grants

Be prepared for upcoming US and EU compliance deadlines

TOTAL COST OF OWNERSHIP

Engine

EFI / ETC/Hybrid: Precision fuel injection, throttle control under load and hybrid power systems.

Maintenances: Leveraging innovation to extend oil & air filter maintenance to maximize uptime. Genuine replacement parts.

Transport Guard: Simultaneous fuel and ignition shutoff prevents transit dilution & costly downtime.
Low upfront cost

Battery

Zero Powertrain Fluids: Eliminates oil, filter, and spark plug servicing.

Charging Logistics:
Requires structured depot grid hardware.

Predictable Energy Cost: Stable off-peak electricity rates per hour. Low long-term cost

Improves Fleet Utilization, Reduces Operating Costs

SAFETY (INDOOR EFFICIENCY)

Engine

Air Quality

LP: Run engines off LP (still has CO)

Direct Exhaust Routing and Mechanical Ventilation

Catalytic Converters and Scrubbers

Noise

Active Noise Cancellation (ANC)

Advanced Exhaust and Intake Tuning

Physical Acoustic Shielding

Turbocharging and Engine Downsizing

Battery

Air Quality

Zero-Emission (ZEZ)

Noise

Enables night work & indoor jobsite access

Eliminate toxic indoor fumes, slashes jobsite noise, operational efficiency

TECHNOLOGY

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Engine

E-gov

IoT and Telematics

Predictive Maintenance

Battery

Fast charging

IoT and Telematics

Variable Speed Customization

Safety

Robotics

Automation

Taking Innovation beyond the Power

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From Cost to Value: Mastering the Rental Lifecycle

John Smeets
Director Fleet Uptime Compliance & Excellence

Boels RENTAL

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THE FUNDAMENTAL CHALLENGE FOR THE RENTAL INDUSTRY

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Sustaining and improving margins in an era of geopolitical uncertainty, rapid technological development, and declining technical knowledge and capacity

DOWNTIME AS A LEVER

From fragmented value-chain players to one European Rental Ecosystem

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THE CORE MESSAGE

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Geopolitics

Costs, interest rates and supply chains

Technology

Emission technology, Electrification, AI & Data, software solutions

Increasing Downtime

Knowledge & capacity

Fewer experts, greater complexity

Fragmented value chain

OEMs, rental, software and logistics

The common thread: less downtime creates more rentable hours, lower TCO, reduced fleet requirements, and higher Money Utilization.

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EXTERNAL PRESSURE IS INCREASING

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A low-growth environment increases the need to generate profitability from productivity and availability.

€34bn	1.7%	0.8%	€30.9bn
expected European rental market in 2027	expected CAGR 2025–2027	expected Western Europe CAGR 2025–2027	2024 European market in ERA/KPMG outlook

Why this affects margins

- Weak construction markets and low growth constrain pricing and volume growth.
- Inflation, conflicts, and geopolitical uncertainty weigh on confidence and investment.
- Chinese competitors are strengthening their position through cost, speed, innovation, and scale.
- Availability and cost per rental hour therefore become more important than CAPEX alone.

Sources: ERA/KPMG European Rental Outlook 2025–2027; VDMA China position paper 2026.

DOWNTIME IS THE SHARED ECONOMIC OUTCOME METRIC

Almost every strategic challenge ultimately translates into lost rentable hours.

Margin improvement = downtime reduction + TCO reduction + knowledge multiplication + supply-chain optimisation

THE CAPACITY SPIRAL REINFORCES ITSELF

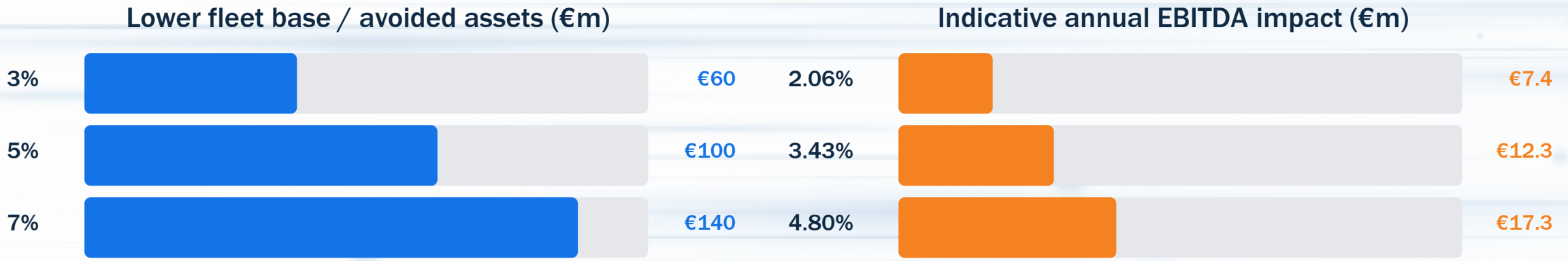
Both rental companies and OEMs have less technical capacity while equipment becomes more complex.

1. **Fewer experts**
2. **Longer support lead times**
3. **Longer downtime**
4. **More escalations**
5. **Even greater support pressure**

ECONOMIC LEVER:

FEWER ASSETS, THE SAME REVENUE

Illustrative sensitivity analysis based on €2,000m fleet value and €1,000m revenue.



Asset reduction	New EBITDA	EBITDA margin	Money Utilisation	Equity V uplift @ 8× EBITDA
0%	€360.0m	36.00%	50.0%	€0.0m
3%	€367.4m	36.74%	51.5%	€59.2m
5%	€372.3m	37.23%	52.6%	€98.4m
7%	€377.3m	37.73%	53.8%	€138.4m

Assumptions: baseline EBITDA margin 36%; R&M = 3.5% of fleet acquisition value (€70m); depreciation excluded from EBITDA.

2030 AND 2035 WITHOUT COLLABORATION

The risks shift from an efficiency gap to loss of control over the value chain.

2030 | EFFICIENCY GAP

- Faster diagnosis, but hardly faster recovery
- Support lead times increase
- Integration costs and manual work keep rising
- Technical knowledge drains from both organisations
- Revenue grows and profitability decreases

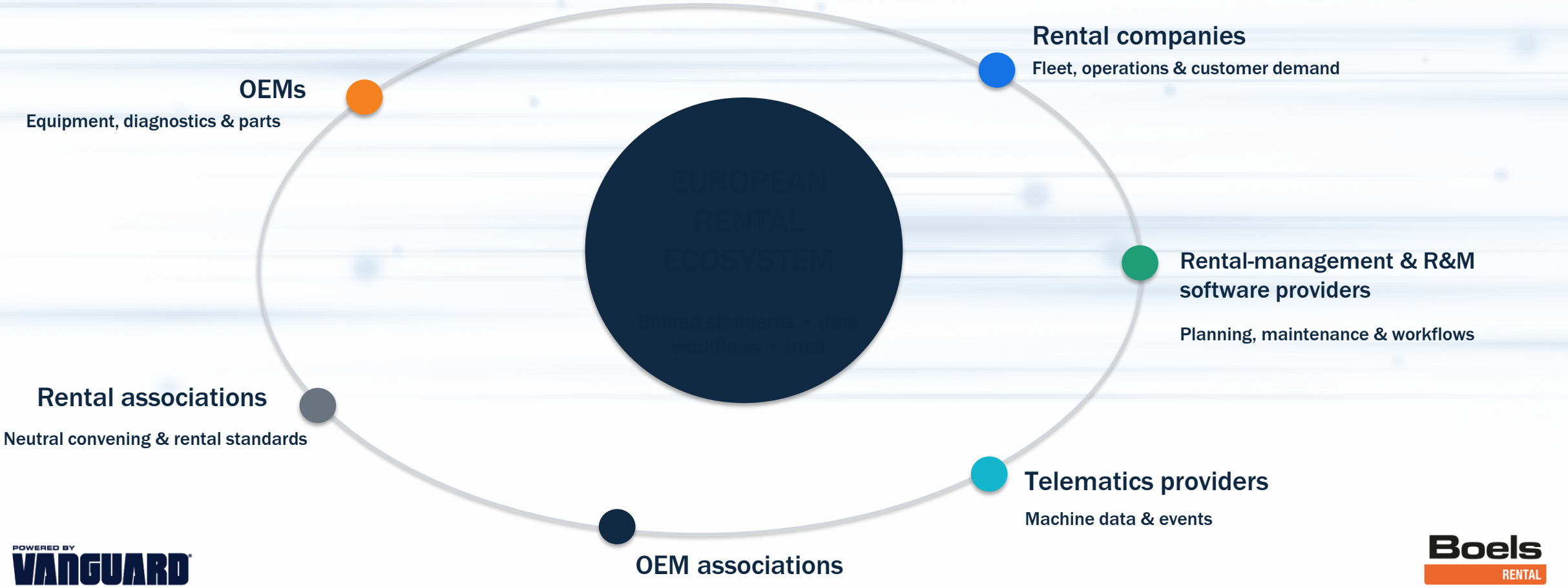
2035 | LOSS OF CONTROL

- OEMs without an ecosystem become commodities
- Rental companies become dependent on scarce experts
- Software platforms capture profit—and control data and workflows
- Consolidation accelerates
- Platform players determine data and standards

Not collaborating is not a neutral choice:
dependency grows while problem-solving capacity declines.

THE RENTAL ECOSYSTEM NEEDS TO CONNECT EVERY ACTOR SHAPING AVAILABILITY

The risks shift from an efficiency gap to loss of control over the value chain.



START BUILDING ON A RENTAL ECOSYSTEM

Partnerships, shared services centred on availability & Open standards.

1. Data & governance
2. Interoperability
3. Knowledge network
4. Connected parts & logistics
5. Workforce & skills
6. AI & orchestration
7. Uptime & TCO governance

Strategic design principle

Compete on customer value.
Collaborate on standards, knowledge, data, and availability.

KNOWLEDGE MUST BE MULTIPLIED, NOT MERELY DEPLOYED

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From one expert solving one case to one solution helping thousands of technicians.

OEM KNOWLEDGE

Engineering, bulletins, fault codes

RENTAL EXPERIENCE

Failure modes, repair time, usage

SOFTWARE INTELLIGENCE

AI diagnostics, search, translation

WORKFORCE

Education, Certification, communities, remote support

Shared Failure Database + Knowledge Cloud + Remote Expert Model

EUROPE'S CHOICE

Do we continue optimising within separate organisations, or jointly build the ecosystem that makes availability scalable?

1. **Launch the focused coalition**
   OEM + ental + ERA Technical Committee + software supplier

2. **Select one use case**
   Parts waiting downtime in one equipment category, Knowledge sharing improvement

3. **Establish standards**
   Asset ID, uptime, ETA, data ownership + integration standards

4. **Prove EBITDA and economic value**
   Downtime, EBITDA, asset requirements + free cash flow

"Nothing is as fast as the speed of trust."

The sector does not need to be cheaper than China.
The sector must demonstrably deliver more available customer hours with less fleet.

QUESTIONS & ANSWERS