



INTERNATIONAL EXECUTIVE
SEARCH FEDERATION

THE FUTURE OF MOBILITY

We know the leaders and executives
that shift the dimensions of the mobility
industry to new horizons

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The International Executive Search Federation is one of the world's most recognized international executive search groups. Identifying talent and leadership in 40 offices and 21 countries, we are globally known as "The Local Experts" because we understand regional markets and their specific needs when it comes to executive recruitment.

IESF connects knowledge, networks and countries.



REDEFINING THE MOBILITY INDUSTRY

We know the leaders and executives that are ahead of the trends

A growing wave of technology-driven megatrends is redefining mobility. The automotive product is changing, with electronics and software growing in prominence in terms of its value in a vehicle. Features that require skills outside traditional core competencies of automotive engineering.

The next decade will see a range of innovative headwinds shift the dimensions of mobility toward new horizons. IESF connects this knowledge, networks and countries.

The disruption in this industry is likely to be huge, and it will bring both great opportunities and risks.



THE TRENDS TRANSFORMING MOBILITY'S FUTURE

Considering the trends reshaping the industry, the most interesting ones that will drive innovation over the next decade are likely to be:

- Electrification
- Autonomous driving
- Vehicle-to-Everything
- Shared Mobility
- Mobility-as-a-Service

The global share of electric vehicles is expected to increase as government regulation ramps up incentives to encourage adoption. Mobility industry integration with electricity grids is emerging. Self-driving vehicles will progressively integrate levels of driver assistance technology advancements.

Preparing companies for the mobility of tomorrow also means making today's business crisis resistant.

IESF KNOWS THE LEADERS AND EXECUTIVES THAT SHIFT THE DIMENSIONS OF THE MOBILITY INDUSTRY TO NEW HORIZONS



THE MOBILITY ECOSYSTEM

Alternative modes are being sought

Car sales were estimated to reach 70 million in 2020, but ended up down on the year; 2021 is expected to show an acceleration of this decline as the COVID-19 lockdowns and its wider economic malaise cause consumer purchasing pullbacks.

The automotive industry is quickly turning into a true mobility ecosystem. OEMs have traditionally worked hand in hand with tier-one suppliers, but today, we are seeing the emergence of a broader ecosystem.

Restricted mobility is lowering demand for public transport and air travel, but people are not necessarily moving less. Enthusiasm for bikes and scooters shows that alternative modes are being sought.

Source: McKinsey



CHANGING CUSTOMER NEEDS

Consumer-centric
mobility run on
electricity

Changing consumer needs are key, with the industry progressively moving from an ownership model toward a Mobility-as-a-Service (MaaS) access model, especially for younger generations. Three pillars have given rise to this change:

1. Alternative powertrain options
2. Electric vehicle advances
3. Popularity of on-demand service access

New mobility forms are required to serve such needs, which is leading to predictions that the contemporary vehicle-centric system of fossil fuel-powered mobility will gradually be replaced by a consumer-centric one run on electricity.

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THE ENGINE OF INNOVATION

We connect the leaders of the world on mobility

Generally, the automotive industry has always been an engine of innovation, because cars combine multiple technologies: chemical, mechanical, electrical, and (increasingly) digital ones. Cars are productive data centers – and increasingly – parts of larger mobility networks due to leaps in computing power, data generation through sensors and cameras, and cheap data storage.

Modular design will play an important role in the future of mobility due to the changing function of the car. Many automakers are presenting multipurpose concept vehicles that can be utilized to carry people while providing more functionality for other uses, such as item delivery.



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Mobility is seeing a pronounced growth of investment in new technologies, which are influencing the industry's transformation.

Companies and organizations are considering how to grow properly across multiple markets and segments and how their supporting operating models are structured. A new combination of cross-sectoral capabilities in a leader is required to build reliable solutions to move people and goods. Increased collaboration among managers acting in different sectors will become essential for fostering innovation. IESF plays an active role in that collaboration.

2021 will be characterized as the year of the intensifying "double mobility transformation," with players operating in an economic slowdown but, at the same time, needing to rethink their business models in a time of heightened city regulation, technology disruptions, and changing consumer needs.