Moving People Forward

class is mytaxi

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mytaxi history
rapid expansion across Europe

- 2009: founded in Hamburg
- 2010: rollout Germany
- 2011: launch in Austria
- 2011/12: launch in Spain & Poland
- 2014: Daimler acquisition
- 2015: Rollout Italy, Portugal & Sweden
- 2016: Merger with Hailo
- 2017: Acquisition of Beat & Clever
- 2018: Daimler & BMW JV
Some numbers
Quickly becoming Europe's largest taxi e-hailing company

- World's first taxi app to establish direct connection between driver and passenger in 2009
- Leading taxi e-hailing company in Europe
- Available in 11 countries and > 50 cities
- > 120,000 registered drivers
- > 700 employees
- Tech hubs in Hamburg, Barcelona and Berlin
Europe is a highly competitive market

Global players looking to enter Europe due to high GMV potential

- Uber across the continent
- Lyft to start in Germany?
- Cabify in Spain and Portugal
- Gett in London and Moscow
- Taxify with focus on Eastern Europe, entering London, Paris, Portugal (Didi investment)
- Rich landscape of local players including taxi.eu & iTaxi, various radio companies
Europe ≠ Europe

The EU is a highly fragmented market - on many levels!

Italy ≠ United Kingdom

Germany ≠ France

Poland ≠ Portugal
Europe ≠ Europe

Some examples that we encounter in our daily work

<table>
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<tr>
<th>Customer characteristics</th>
<th>vs.</th>
<th>Italian drivers who may only share taxi with family members</th>
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<td>Berlin taxi owner with 500 drivers</td>
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<th>Regulatory environment</th>
<th>vs.</th>
<th>Deregulated Polish market</th>
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<td>Micro regulations in Spain</td>
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<th>Vehicle quality</th>
<th>vs.</th>
<th>Romanian Dacia</th>
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<td>German E-Class taxis</td>
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Our take

1. Taxis are extremely relevant for the future of on-demand mobility

2. Important to get regulation right and create a level playing field for taxis and PHV. EC should not shy away.

3. Change is imminent and inevitable, need to stay on top of the game
Chance for one European player to glue the different pieces together!