



Leading Through the Mobility Transformation: A CxO Agenda

■ by Stephanie von Bary and Johanna Prasch

After a period of intense transformation, Europe's mobility sector appears to be pausing its implementation of change to a large extent. While new technologies, shifting societal values, and ecological imperatives are opening significant opportunities for innovation, sustainability, and new business models, geopolitical uncertainty, economic tensions, regulatory lag, and skilled labor shortages are slowing progress. Yet, this is not a standstill but a sorting moment.

In this environment, transformation demands more than technological renewal. It requires strategic leadership, cultural change, and organizational resilience. The central question is no longer which technology wins, but which leaders can navigate complexity successfully, turning it into new forms of value creation. Leaders who sharpen focus, leverage policy leeway, and treat culture as operating system can convert today's pause into advantage. Those waiting for political direction risk falling behind.

Insights from conversations with more than a dozen senior executives across the mobility ecosystem - from rail and infrastructure operators to mobility tech innovators and charging providers - underline this divergence. While many cite political gridlock and labor scarcity as limiting factors, others point to proactive leadership, strong partnerships, and strategic clarity as drivers of progress. Ultimately, an organization's ability to transform depends less on its sector and more on the mindset of its leadership.

Part I: The Diagnosis Why Transformation Paused

The mobility sector in Germany and Europe faces a paradox: the pressure to change has never been greater - driven by ecological, technological, and geopolitical forces - yet progress remains fragmented, slow, and often reactive. Transformation has stalled not for lack of ambition but for structural reasons. Three pressures currently shape mobility in Europe: 1) technology has matured faster than the system can absorb it, 2) mobility's historic role as a growth engine is under strain because implementation capacity trails strategy, and 3) political volatility increases planning risk and leadership tension. Understanding these forces clarifies why many organizations focus on maintaining stable operations rather than pushing on transformation - and what it will take to restart momentum.

1. The mobility revolution is on hold.

The first wave of the mobility revolution - centered around EVs, autonomous driving, and mobility-as-a-service - raised expectations for cleaner, safer, more efficient mobility, yet the market step-change has not materialized at the anticipated pace. Much of the technology is already reality: Autonomous driving is largely viable, and electric mobility continues to grow. But infrastructure, grid capacity, and user adoption lag behind. Market dynamics have shifted from aggressive expansion to consolidation, with many providers focusing on profitability. Companies are

using the pause to reassess business models, reset portfolios and partnerships, and align more closely with long-term value creation. While this recalibration can be healthy, it carries a competitive risk as other countries push ahead fast, establishing new regulatory and operating benchmarks.

2. Mobility as an economic driver is losing momentum.

Mobility has long powered Europe's and Germany's economy, anchored in a strong automotive sector and supported by rail, public transport, and logistics. But this engine is losing momentum: despite record public investment, implementation capacity trails ambition, and short- and medium-term improvements to rail and road systems lag behind targets and maintenance needs. Planning, permitting, and execution are slowed by limited engineering and operational capacity, while a growing shortage of skilled labor in public transport, logistics, and field operations acts as a structural constraint. Without rebuilding delivery capacity and workforce pipelines, the sector's growth role will continue to erode.

3. Political uncertainty reinforces structural paralysis.

Strategic transformation requires reliable conditions. However, today's political landscape characterized by geopolitical instability, national polarization, and regulatory volatility creates the opposite: global trade conflicts, geopolitical tensions, and energy shocks complicate long-term planning;

domestic discourse in Germany is increasingly fragmented and mobility policy remains ideologically charged; and frequent legal changes with unclear responsibilities slow approvals - especially for long-term infrastructure. This combination heightens planning risk, triggers more cautious corporate investment, and creates leadership challenges around employee safety, internal communication, and external positioning when societal events demand a stance. Political uncertainty becomes a bottleneck: where clarity is lacking, bold decisions are less likely.

Part II: The Leadership Response Three Archetypes Outmaneuvering the System

These structural constraints mean that transformation is not primarily a question of technology or capital; it is a question of **leadership clarity and courage**. The interviews reveal three distinct archetypes - the Shaper, the Realist, and the Culture Architect - who are refusing to be paralyzed by the current environment.

1. The Shaper: Countering the "Hype Gap" with Radical Focus and Platform Thinking

The Shaper archetype, typically operating in dynamic, tech-driven environments, views the current market contraction not as a setback, but as a

strategic space to shape their vision for disciplined action. Their leadership is defined by a fierce commitment to Strategic Focus and a wholistic view of the sector. Uniting Trait: They lead through focus, not through activism. They understand that in transformation, doing less - but doing it well - can be the most powerful strategy of all, knowing that in our complex world, each action influences many aspects. Their leadership is anticipatory, systemic, and future-oriented.

Prioritizing Focus: They understand that transformation efforts often lose momentum and impact not because of resistance but because of overextension. *“We have too many projects running at the same time - and too little impact,”* is a common observation. Shapers are moving away from what one executive called the simultaneous pursuit of too many initiatives that stretches organizations thin. The response is a radical shift toward **prioritization** anchored in a clear, shared vision and learning *“to say no - even to good ideas”*.

Platform Logic Over Product Focus: Shapers are using the market deceleration to consolidate their organizations, invest in scalable platforms, and build ecosystems. *“Now is the time to create structures that can scale - when the market is in our favor,”* states a mobility platform CEO. They position mobility not as a product, but as a complex service requiring systemic orchestration of hardware, data, and user experience.

2. The Realist: Countering Political Paralysis with Systemic Co-Creation

The Realist tends to work in heavily regulated, capital-

intensive areas. They navigate within long planning cycles and complex stakeholder environments. In times of growing (political) uncertainty and polarization, they reject a passive stance, recognizing that they must actively shape the system from within. They know that *“if [they] wait for politics to clear the way, [they] will never get going”*. Uniting Trait: They are system-relevant and know it. They understand the critical role the mobility sector plays for the (German) economy. Their leadership is grounded in pragmatism and focused on long-term impact. Realists accept uncertainty as reality and take proactive steps to shape regulation, rather than merely reacting to it. And they know that these kinds of changes require a united (internal) front.

Rejecting the Victim Role: They manage political ambiguity not by waiting for stability, but by leading despite the uncertainty. *“We need to get out of the victim role. We need to co-create,”* one executive asserted. Their strategies include leveraging functional outsourcing and fostering stronger collaboration with municipalities and other intermodal networks to create practical opportunities for maneuvering. Rather than retreating, they are actively shaping the system from within.

Demanding Internal Cohesion: At the same time, Realists are candid about the internal challenges they face. External pressure requires internal alignment. *“We need a board that acts as a team - not as a collection of departments,”* emphasized one leader, stressing that systemic changes require the leadership team to act as a cohesive unit. They create clarity not only in vision, but in execution.

3. The Culture Architect: Redefining Leadership for Lasting Transformation

The Culture Architect understands that technology, capital, and regulation are necessary but insufficient conditions for sustainable transformation. Culture is the operating system in which the success of change processes is decided, especially in challenging environments marked by high turnover, labor shortages, and political complexity. Uniting Trait: Culture Architects lead through their own attitude and emotional intelligence. They believe in the transformational power of leadership and understand that successful change begins with the leader’s willingness to learn, reflect, and evolve, not in the organizational chart.

Culture as a Leadership Task: These leaders do not see culture as an HR topic, but as a leadership topic. They create spaces where people feel empowered to challenge the status quo and contribute to innovation. Their central creed: *“We cannot change reality - but we can change how we respond to it.”* This includes embracing cultural diversity as a strategic asset: *“Techies think differently - and that’s a good thing. But they need an environment that allows for it.”*

Personal Transformation: Culture Architects are willing to reflect on their own development, seeing transformation as a personal journey. *“I realized I was reaching my leadership limits. From doer to coach - that’s a real shift.”* Another executive emphasized the importance of seeking feedback: *“If I’m not willing to change - how can I expect others to?”* These leaders understand

that inspiring and guiding others through uncertainty requires emotional intelligence, humility and the courage to evolve.

Part III: The CxO Agenda Turning the Pause into a Pivot

The interviews make clear that the next phase of the mobility revolution will be determined by those who possess the courage to lead through uncertainty. Four strategic fields of action emerged as principles for effective leadership in the coming years, based on the already successful Leadership Archetypes. These principles are not independent of one another; they interlock like gears in a new understanding of leadership:

1. Weaponize the Pause - Use Market Slowdown to Sharpen Focus and Build Resilient Ecosystems:

The current market slowdown is a strategic window. Conduct a ruthless review of your portfolio: sharpen target visions and consolidate projects. Rethink

partnerships, seeking strategic allies even beyond your own traditional industry to build resilient ecosystems. Strategic focus means aligning resources, leadership attention, and organizational energy around what truly matters.

2. Occupy the Political Space - Lead with Conviction Amid Uncertainty:

Accept political volatility as a leadership reality and shape the environment wherever possible. Make informed decisions despite uncertainty and communicate them transparently. Take a stand based on core values rather than partisan interests. Organizations that demonstrate conviction enhance their credibility, both internally and externally.

3. Lead From the Inside Out - Start Cultural Transformation as Personal Transformation:

Redefine the leadership model from the "hero leader" to the "enabler." Actively shape culture by prioritizing psychological safety and diversity, creating

an environment that allows people to act with purpose and resilience. Transformation starts with strengthening self-leadership, ensuring that the leader's willingness to learn sets the tone for the entire organization.

4. Orchestrate Mobility Beyond Technology - Creating System-Level Value:

Treat mobility as societal infrastructure. The biggest gains come from integrating transportation modes, governing data well, and designing services around availability, affordability, and quality.

Conclusion

The future of mobility is open. And it belongs to those who choose to lead it, navigating complexity with clarity, conviction, and consistency.

About Egon Zehnder

Egon Zehnder is the world's preeminent leadership advisory firm, inspiring leaders to navigate complex questions with human answers. We help organizations get to the heart of their leadership challenges and offer honest feedback and insights to help leaders realize their true being and purpose.

We are built on a foundation that supports partnership in the truest sense of the word and aligns our interests with the interests of our clients. Our 600 consultants across 71 offices and 37 countries are former industry and functional leaders who collaborate seamlessly across geographies, industries and functions to deliver the full power of the Firm to every client, every time.

We partner closely with public and private corporations, family-owned enterprises, and non-profit and government agencies to provide executive search, leadership solutions, CEO search and succession, board advisory, and diversity, equity & inclusion.

Our services include discovering leaders, developing leadership, advancing governance, shaping successions, and unlocking transformations. We partner with Mobius Executive Leadership to offer highly experiential, personalized and transformational programs for senior leaders.

We believe that together we can transform people, organizations and the world through leadership.

For more information, visit www.egonzehnder.com and follow us on [LinkedIn](#).

For more information:



Stephanie von Bary
Munich
stephanie.bary@egonzehnder.com



Johanna Prasch
Munich
johanna.prasch@egonzehnder.com