



for



EUROPEAN  
RENTAL  
ASSOCIATION

**ERA** (European Rental  
Association)

# From Digitalization to AI

KPMG Strategy | Final report  
November 2025





# Executive Summary (1/2)

| Main topic                    | Key insights                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| AI scope, definition & trends | <ul style="list-style-type: none"><li>AI has been developed in the 1950's and now encapsulates <b>a wide variety of concepts</b> (machine learning, deep learning, gen-Ai, agentic AI) and <b>ever-more advanced applications</b>, including for rental companies</li><li><b>Generative AI</b> is a type of AI that relies on Large Language models (LLM) and generates new content such as text, images, audio, video, code, 3D objects and data. Natural Language Functionality is built in by default so you can seamlessly interact with the models</li><li><b>Agentic AI</b> are software entities that autonomously or semi-autonomously gather information, reason with LLMs, and use tools to plan and execute actions toward goals</li><li>Across the rental industry, <b>AI is perceived as a core business enabler</b> (e.g., for fleet management and utilization, operational efficiency and logistics, pricing and demand planning, damage and theft prevention), yet with very <b>limited adoption rates</b>. The sales function finds many mature AI use cases and could be significantly improved</li></ul>                                                                                                                                                                                                                                                                                  |
| AI use cases for rental co    | <ul style="list-style-type: none"><li>This report gathers <b>40 AI use cases meaningful for rental companies</b>. 17 AI experts from 10 rental companies <b>selected</b> the most relevant use cases for the industry and <b>scored their impact</b> (economic gain, non-economic gain and scalability) <b>and accessibility</b> (compatibility with existing assets, required investments, risk level). The presented outcomes are <b>preliminary</b> and should be referred to as an indicative baseline to work with and to be refined.</li><li><b>The risks</b>, associated to each AI use cases depend on each company and should be looked at carefully before any AI implementation.</li><li>Fleet management optimization, inventory optimization, rental demand forecasting, maintenance assistant, delivery route optimization, and pricing optimization use cases are considered <b>the most strategic to address</b>, despite high implementation barriers</li><li>Sales-related use cases (online product comparison tool, customer chatbot, customer visits prioritization for salesforces) were scored as easier to implement, yet with still quite high impact</li><li>Market-wise, <b>multiple tech providers</b> (rental-specific or not) have developed AI solutions for those use cases, however the global maturity of those solutions remains <b>exploratory/early stage</b>.</li></ul> |

# Executive Summary (2/2)

| Main topic                   | Key insights                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| AI implementation guidelines | <p>For a successful AI implementation at scale, rental companies require <b>a clear vision</b>, based on:</p> <ul style="list-style-type: none"><li>• A <b>dedicated and clear AI governance</b>:<ul style="list-style-type: none"><li>• As AI has both front and back-office impacts, <b>tech must co-evolve with business</b>, ensuring AI is not only built but also useful, usable and effectively used</li><li>• An <b>AI Lead should be designated</b> to embody the vision and coordinate AI initiatives. This AI lead may be either someone with an existing C-suite role or someone new, external</li><li>• This AI lead will help <b>raise awareness about AI within the company, ensure the AI solutions used deliver targeted business outcomes</b> and that people utilize the appropriate AI tools, regulatory compliant</li></ul></li><li>• An <b>adequate delivery model</b>:<ul style="list-style-type: none"><li>• Depending on a company size, its AI maturity and strategic goals, different delivery models might be relevant. As most rental companies are SMEs, an <b>approach with off-the-shelf AI products suitable for standard AI use cases with limited in-house configuration or development</b> might be the ideal initial AI path to engage in</li><li>• However, this scenario might vary depending on key constraints around cost and time, expertise and resources, security and regulation, evolution and agility. In certain cases, <b>customizing and training a foundation AI might be a better option</b>, or even building its own in-house AI</li></ul></li><li>• The <b>right actionable data</b>: AI solutions all rely on data, therefore <b>ensuring the quality, relevance and structuring of the data is a fundamental prerequisite</b> before any AI implementation. For certain use cases, requiring large amounts of aggregated data, issued from multiple sources, a <b>data lake implementation can be necessary</b>.</li><li>• A <b>robust change management approach</b>: cultivating AI talents and ensuring the development of technical skills for all – meaning employees are continuously informed and actively engaged to integrate AI innovations into their daily practices</li><li>• The <b>right ecosystem of partners/providers</b>: to refine progressively and co-build AI applications relevant for the industry, with rental-specific tech providers for core business AI use cases and rental-specific or more generic providers for support function AI use cases</li><li>• A <b>thoughtful and secure framework</b>: to control and mitigate AI-related risks, ensuring compliance with regulations (such as the <b>EU AI Act</b>), standards, and best practices</li></ul> |



for



# Contents

## 01 – Introduction to AI

02 – Panorama of most relevant AI use cases for rental companies

03 – Preliminary top priorities for rental companies

04 – Global AI implementation recommendations

05 – Appendix



# AI has been developed in the 1950’s and now encapsulates a wide variety of ever-more advanced applications, including for rental companies

| Key AI concepts                                                                                                                                                            | Scope & definitions                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Illustrative rental AI use case                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <div><div>Artificial Intelligence1950's</div><div>Machine Learning1980's</div><div>Deep Learning2010's</div><div>Generative AI2020's</div><div>Agentic AI2025+</div></div> | <div><div><ul style="list-style-type: none"><li>Refers to <b>systems that mimic human intelligence to analyze, interpret, predict, or perform tasks</b></li><li>Uses input data such as numbers to produce outputs like probabilities or numerical values</li></ul></div><div><div><ul style="list-style-type: none"><li><b>Simulates human learning</b> by continuously analyzing and evaluating data sets</li><li>Develops and continuously improves performance, adapting based on patterns and feedback</li></ul></div></div><div><div><ul style="list-style-type: none"><li><b>Uses artificial neural networks with many layers</b> to learn from large amounts of data</li><li>Doesn't rely on structured datasets and learns through trial and error, adjusting its algorithms</li></ul></div></div><div><div><ul style="list-style-type: none"><li><b>Goes beyond analysis, creates</b></li><li>Generates new content by leveraging patterns learned from existing data (e.g., text, images, music...)</li></ul></div></div><div><div><ul style="list-style-type: none"><li><b>Is capable of independent reasoning, decision-making and goal-oriented execution</b></li><li>Can proactively manage complex processes, adapt to changing conditions and collaborate with humans and other systems</li></ul></div></div></div> | <div><div><p><i>If the site is uneven, then recommend the adequate undercarriage (wheels or tracks)</i></p></div><div><div><p><i>Predict increased demand for equipment type based on data sets such as weather conditions</i></p></div></div><div><div><p><i>Detect cracks or wear on a backhoe loader using customer-submitted photos</i></p></div></div><div><div><p><i>Create a technical report on equipment condition with maintenance suggestions, based on visual and sensor data</i></p></div></div><div><div><p><i>Detect a motor anomaly via sensors, schedule a technician, inform the client, propose a temporary replacement, and update the rental calendar</i></p></div></div></div> |

Sources: KPMG Research & Analysis

# Generative AI has potential to accelerate content production and personalization

## Zoom Gen AI

### Definition & usage

1

Generative AI is a type of AI that relies on **Large Language models (LLM)** and **generates new content** such as text, images, audio, video, code, 3D objects and data

2

**Natural Language Functionality is built in by default** so you can seamlessly interact with the models

### Key GenAI applications and illustrative rental use cases

ILLUSTRATIVE, NON-EXHAUSTIVE



#### Content Creation



GenAI can generate text, image, reports, music, videos...

##### Rental example

*Generate product descriptions, write equipment utilization guides, create how-to use videos...*



#### Personalization



GenAI can create personalized content for marketing and customer service

##### Rental example

*Create personalized marketing emails and landing pages tailored to different customer segments*



#### Data Augmentation

MOSTLY AI

GenAI can create synthetic data to supplement real data, improving performance of models

##### Rental example

*Generate synthetic datasets to train predictive models for equipment failure without exposing sensitive customer data, ensuring GDPR compliance*



#### Simulation and testing

KLARITY

GenAI can generate business scenarios and test strategies

##### Rental example

*Produce simulated demand scenarios (e.g., peak rentals during major construction projects) and test fleet allocation strategies*



#### Design and prototyping

Midjourney

GenAI can create new design concepts in very short time

##### Rental example

*Rapidly create prototypes for a new mobile app interface, to facilitate equipment inspection at delivery & pickup*



#### Risk Management

Anaplan

GenAI can create a wide array of possible risk scenarios to be better prepared for potential issues

##### Rental example

*Generate financial risk scenarios to model the impact of sudden interest rate hikes or concrete sales increases on profitability*

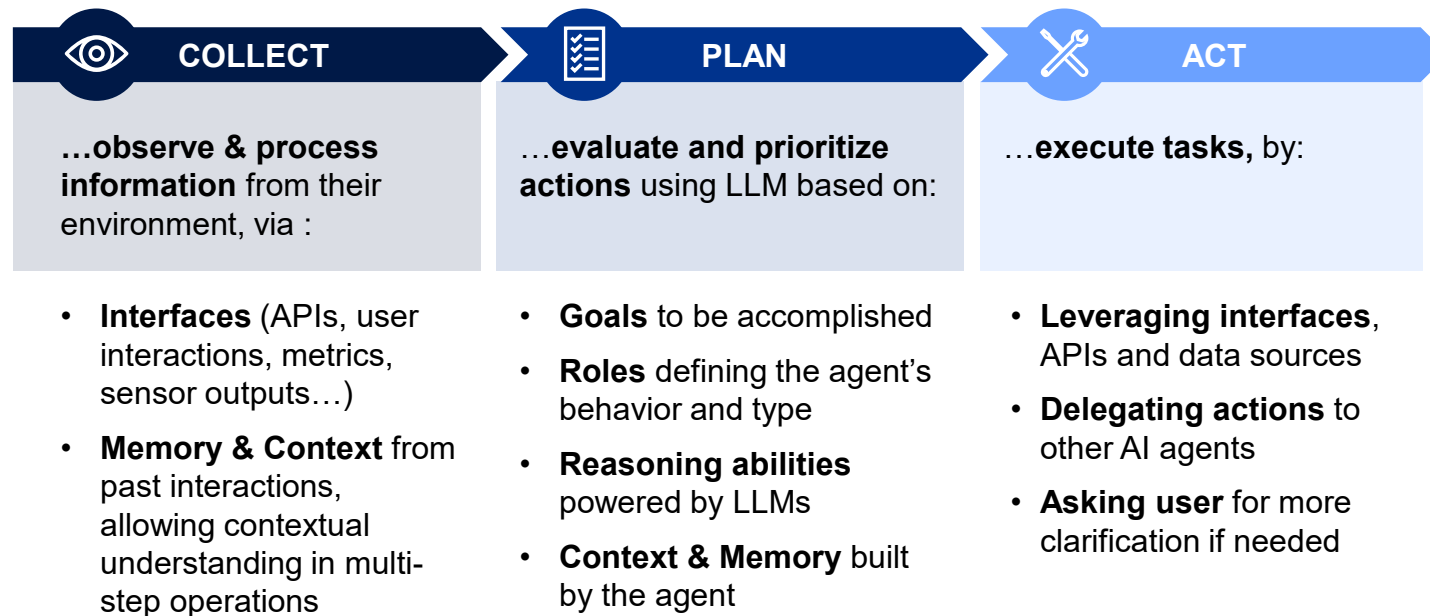
Sources: Corporate websites, KPMG Research & Analysis

# Even more so with agentic AI that marks a shift towards autonomous execution...

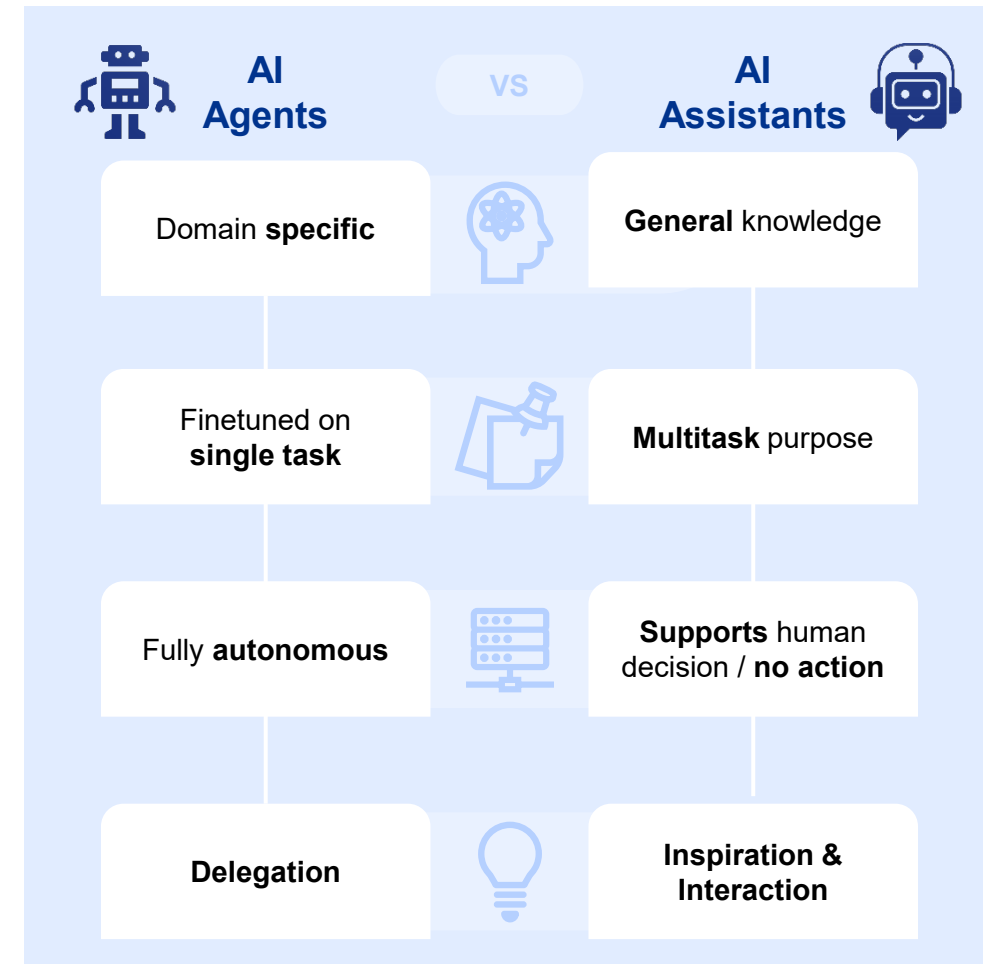
Zoom agentic AI

## Definition and function of an **agentic AI**...

*Agentic AI are software entities that **autonomously or semi-autonomously gather information**, reason with LLMs, and use tools to **plan and execute** actions toward goals*



## ... more advanced and autonomous than an **AI assistant**



Sources: KPMG Research & Analysis

# ...unlocking new opportunities with a diverse landscape of AI agents, from simple automation to self-learning systems

Zoom agentic AI

## Typology of AI agents

|                                                                                   | Fixed Automation                                                    | LLM-enhanced                                                                     | ReAct                                                                | ReAct + RAG                                                             | Tool enhanced                                          | Self reflecting                                                                     | Memory-enhanced                                          | Environment Controllers                                                 | Self-learning Agent                                                       |
|-----------------------------------------------------------------------------------|---------------------------------------------------------------------|----------------------------------------------------------------------------------|----------------------------------------------------------------------|-------------------------------------------------------------------------|--------------------------------------------------------|-------------------------------------------------------------------------------------|----------------------------------------------------------|-------------------------------------------------------------------------|---------------------------------------------------------------------------|
|  | THE DIGITAL ASSEMBLY LINE                                           | SMARTER, BUT NOT EINSTEIN                                                        | REASONING MEETS ACTION                                               | GROUNDING INTELLIGENCE                                                  | THE MULTI-TASKER                                       | THE PHILOSOPHER                                                                     | THE PERSONALIZED POWERHOUSES                             | THE WORLD SHAPER                                                        | THE EVOLUTIONARIES                                                        |
| Main characteristics                                                              | No real intelligence, predictable actions, narrow functionality     | Rule-based, context-sensitive, no memory retention                               | Multi-step execution, dynamic planning, basic problem-solving        | Access to outside data, reduced hallucination risk, real-time updates   | Combines tools, executes dynamically, highly automated | Self-monitoring, transparent decision-making, continuous learning                   | Long-term memory, learns from interaction, user-adaptive | Autonomous system control, environment-responsive, feedback loop-driven | Learns and adapts independently, scalable behavior, evolves over time     |
| Examples of use cases                                                             | RPA workflows, auto-reply emails, basic scripting                   | Spam filters, content moderation, support ticket triage                          | Trip planners, AI-based project tools, interactive gaming assistants | Legal research bots, AI medical assistants, advanced support systems    | Code writing assistants, data analytics bots           | QA bots, systems that self-assess or optimize                                       | Smart assistants, AI for personalized project management | AutoGPT, smart cities, adaptive robotics                                | Predictive AI in finance, neural networks, swarm intelligence             |
| Best suited for                                                                   | Routine tasks with structured inputs that don't require flexibility | High-volume tasks with some variation, where accuracy and cost efficiency matter | Strategic tasks, scenario planning, and adapting to evolving inputs  | High-risk decision-making, specialized areas, real-time data dependency | Complex workflows with heavy API/tool usage            | Environments where traceability, responsibility, and iterative improvements are key | Personalized experiences and sustained interactions      | IoT management, autonomous systems, infrastructure-level automation     | Cutting-edge R&D, systems that learn and grow without direct intervention |

Sources: KPMG Research & Analysis

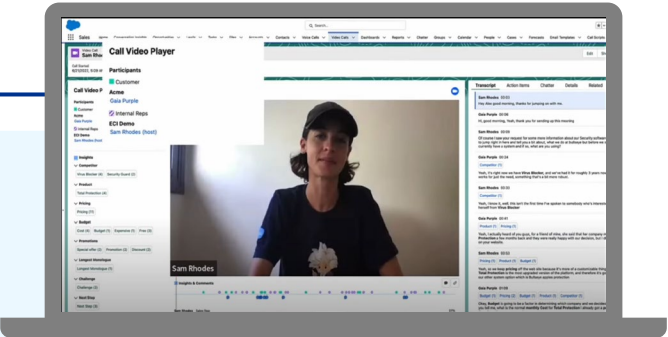




# For instance, AI agents can significantly improve the efficiency of the customer services: from client call to CRM data consolidation

Zoom **agentic AI**

## Example of process redesign with AI agents



Sources: KPMG Research & Analysis



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# Ultimately, AI has the power to deeply transform businesses with diverse levels of impact, depending on deployed solutions and their adoption scale

## Multiple levels of impact

1 On daily ways of working

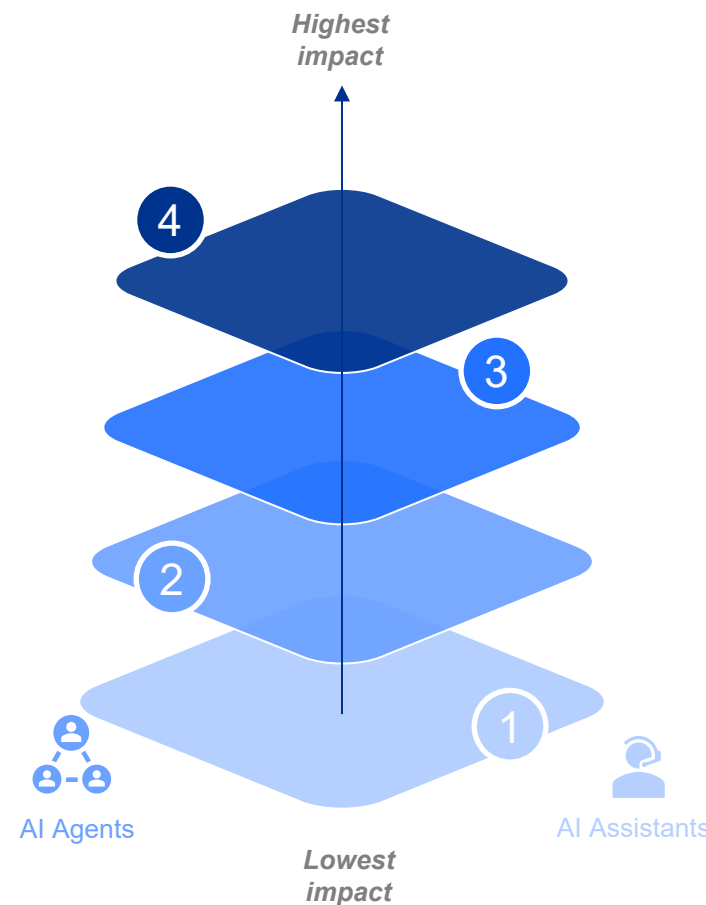
- New office tools with AI
- Automation of tasks, decision support, knowledge
- Personal productivity, employee satisfaction, error reduction

**Challenge** → Problem adoption & ROI

2 On functions & macro-processes

- Reshape of functional process with AI
- Empower employees with AI capabilities on functional expertise and optimize workflows
- Revenue growth, Cost reduction, efficiency & time to market

**Challenge** → Difficult to initiate transformation at scale with all angles



3 On business models

- New product & services with AI
- Enlarge offer with data/AI-based hyper personalized services for customers, data monetization
- Revenue diversification, competitive advantage

**Challenge** → Potential disruption in market, how to position in my sector?

4 On society

- New relation to information, transformation of work, new leisure with AI, new products & services as citizen
- AI is going to be more & more embedded in personal daily life
- More connected & augmented

**Challenge** → Fear, trust, sovereignty, AI for good

Sources: KPMG Research & Analysis

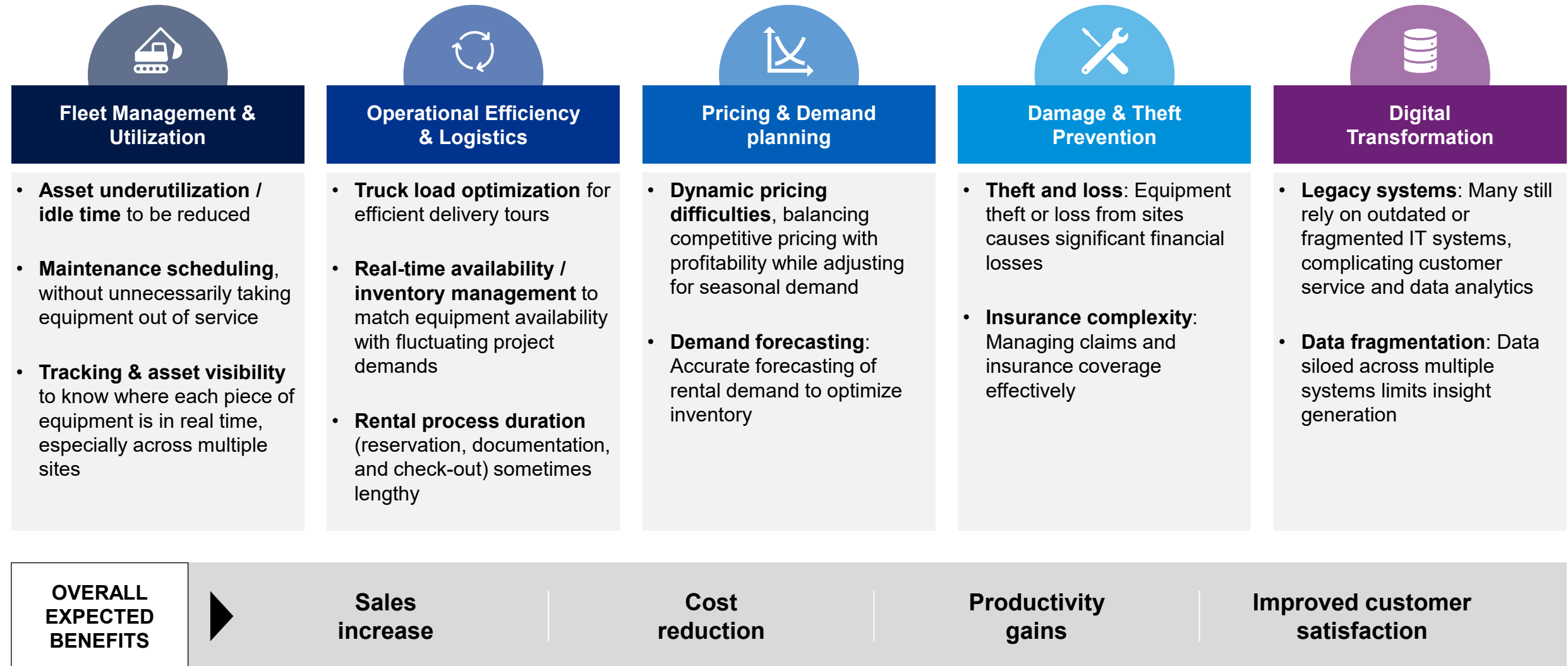
# Across the industry, AI is at least perceived as a core business facilitator, at best being adopted widely with already significant positive outcomes

## Key AI-adoption metrics across the industry in Europe & North America



Sources: RateGain State of Car Rentals 2025, Car Rental Industry Report 2025, McKinsey Global AI Survey 2025, ~1,300 execs, Deloitte Smart Manufacturing Survey 2025, AllAboutAI – AI Statistics in Manufacturing 2025, KPMG Research & Analysis | \* Figures displayed in this section were gathered during a workshop session held at the 2025 ERA Convention in Dublin

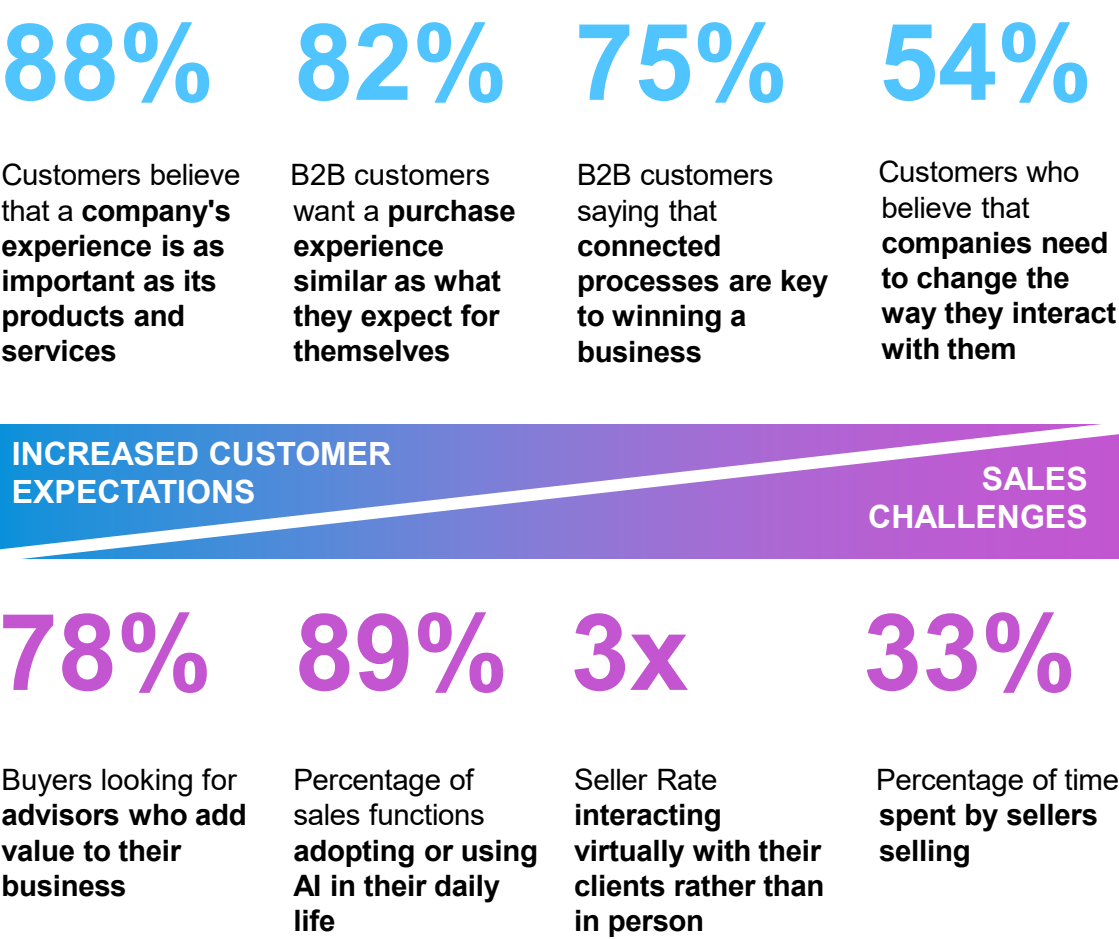
# Indeed, rental companies face key challenges in managing their fleet, revenue and customer service that could be addressed leveraging AI solutions



Sources: ERA, KPMG Research & Analysis

# For instance, the sales function, addressing key customer concerns, could be significantly improved with AI

Across industries, sales challenges increase...



Sources: KPMG Research & Analysis

... highlighting potential for sales transformation in the rental industry

| NON-EXHAUSTIVE  |                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                  |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | Transformative action                                                                                                                                                                     | Illustrative rental use case                                                                                                                                                                                                                                                     |
| AUTO-MATION     | <ul style="list-style-type: none"><li>Allowing sales forces to <b>improve their efficiency</b> and gain time...</li><li>...to <b>focus on more value-added tasks</b></li></ul>            | <i>Reduce time spent on the phone with customers by <b>streamlining document generation and sending</b> (e.g., equipment info, rental contracts t&amp;c)</i>                                                                                                                     |
| CUSTOMER FOCUS  | <ul style="list-style-type: none"><li>Developing a more customer-centric approach...</li><li>...to <b>meet expectations of hyper-personalized services</b></li></ul>                      | <i>Customize service with <b>virtual assistants</b> that <b>provide recommendations</b> for adequate product selection &amp; use and <b>answer questions</b> along the rental process</i>                                                                                        |
| TRANS-VERSALITY | <ul style="list-style-type: none"><li>Developing a <b>stronger integration with marketing and customer services</b>...</li><li>...to ensure a best-in-class customer experience</li></ul> | <i>Mutualize databases to <b>prioritize customer visits</b>. <b>Analyze customer interactions from varied data sources</b> (e.g., phone records, claim records, web traffic). <b>Rank clients</b> based on potential value and risk of churn; <b>plan visits</b> accordingly</i> |





for



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01 – Introduction to AI

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# Looking at a typical rental operating model, a large variety of challenges can be addressed through targeted data-driven and AI solutions

Examples of role-specific challenges and the data solutions to address them

|                    |  Hire Consultant                                                                 |  Branch Manager                                                      |  Maintenance Manager          |  Driver                                             |  Fleet Manager                                     |  Sales Executive                                 |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| Role               | Primary client interface; Manage <b>daily operations</b> including transport, rental quotation, invoicing, and aftersales support                                 | Lead the branch's <b>performance</b> , overseeing P&L, staffing, and fleet availability; Ensure business growth and <b>operational efficiency</b>     | Ensure the <b>proper condition, safety, and regulatory compliance</b> of equipment both on-site and in the fleet | Ensure <b>timely and safe equipment delivery</b> / return of equipment to / from client sites, following quality and safety guidelines | Manage the <b>availability, inspection, and condition</b> of the <b>equipment fleet</b> ; Oversee fleet turnaround between rentals    | Expand client portfolio and nurtures existing relationships; Drive revenue by <b>promoting rental services and offers</b>           |
| Challenge          | Time lost handling <b>repetitive</b> administrative tasks, inconsistent customer responses, difficulty in <b>prioritizing</b> customer requests during peak times | <b>Limited visibility</b> on operational performance, difficulty in <b>forecasting demand</b> and managing branch profitability, fragmented reporting | Lack of preventive insights on equipment issues, <b>heavy manual workload</b> to monitor compliance and safety   | <b>Unpredictable delivery routes</b> , risk of non-compliance with safety standards, lack of visibility on last-minute changes         | Difficulty <b>tracking</b> usage and condition of equipment <b>in real time</b> , high idle time, lack of visibility on return status | Low visibility on customer behavior and needs, <b>limited support to target prospects</b> effectively, difficult ROI justification. |
| Technical solution |  Workflow Automation                                                           | Dynamic Pricing                                                                                                                                       | Predictive Maintenance                                                                                           | Route Optimization                                                                                                                     | Fleet Health Monitoring                                                                                                               | Sales Forecasting Assistant                                                                                                         |
|                    |  Quotation Assistant                                                           | Assistant for Workforce Planning                                                                                                                      | Technical Instruction Chatbot / Assistant                                                                        | Delivery Report assistant                                                                                                              | Return Inspection Checklist Assistant                                                                                                 | CRM Assistant                                                                                                                       |

Sources: Corporate websites, Research & KPMG analysis

# AI can be deployed within multiple functions across rental companies

## Definition of key functions within a rental company

| Core business functions                                                                                                                                                                                                                        |                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                    |                                                                                                                                                                                                                      |                                                                                                                                                            |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Sales & Aftersales                                                                                                                                           |  Fleet Management                                                                                                                                           |  Operations                                                                                                                                                           |  Maintenance                                                                                                                    |                                                                                                                                                                                                                      |                                                                                                                                                            |
| <ul style="list-style-type: none"><li>• Customer <b>support for purchase and use</b></li><li>• Satisfaction measurement, <b>claims</b> handling</li><li>• <b>Business development</b>: customer acquisition &amp; account management</li></ul> | <ul style="list-style-type: none"><li>• <b>Selection and purchase</b> of machines, tools, and vehicles</li><li>• Vendor negotiations and <b>partnerships with OEMs &amp; Suppliers</b></li><li>• Fleet <b>renewal</b> and disposal</li></ul> | <ul style="list-style-type: none"><li>• <b>Rental contract</b> management</li><li>• <b>Reservation</b>, check-out, and return processes at branch level</li><li>• Scheduling, dispatching, and <b>logistics</b> of equipment (delivery/pickup)</li></ul> | <ul style="list-style-type: none"><li>• <b>Safety inspections</b> and compliance checks</li><li>• <b>On-site service interventions</b></li><li>• <b>Equipment repairment</b> and workshop operations</li></ul>     |                                                                                                                                                                                                                      |                                                                                                                                                            |
| Support functions                                                                                                                                                                                                                              |                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                    |                                                                                                                                                                                                                      |                                                                                                                                                            |
|  Finance                                                                                                                                                      |  HR                                                                                                                                                         |  IT                                                                                                                                                                   |  Marketing                                                                                                                      | Legal                                                                                                                                                                                                                |  Strategy                                                               |
| <ul style="list-style-type: none"><li>• Budgeting, cost control, and <b>profitability tracking</b></li><li>• <b>Billing and payment</b> collection</li><li>• Risk management and <b>insurance</b></li></ul>                                    | <ul style="list-style-type: none"><li>• <b>Recruitment</b>, and <b>career management</b> of employees</li><li>• Ongoing <b>training</b></li><li>• Compensation and <b>payroll</b></li></ul>                                                  | <ul style="list-style-type: none"><li>• Rental management systems (<b>ERP</b>)</li><li>• Online <b>platforms</b> and apps for booking</li><li>• Telematics and <b>IoT</b> for fleet tracking</li><li>• <b>Cybersecurity</b> and data analytics</li></ul> | <ul style="list-style-type: none"><li>• <b>Brand management</b> and market positioning</li><li>• <b>Digital marketing</b> and customer acquisition</li><li>• Promotions, <b>events</b>, and sponsorships</li></ul> | <ul style="list-style-type: none"><li>• <b>Contract</b> drafting and negotiation</li><li>• <b>Litigation and claims</b> handling</li><li>• <b>Compliance</b> with labor, transport, and environmental laws</li></ul> | <ul style="list-style-type: none"><li>• <b>Market analysis</b> (trends, competition)</li><li>• <b>Growth scenarios</b> (organic or acquisitions)</li></ul> |

Sources: ERA, KPMG Research & Analysis

# AI can be deployed within multiple functions across rental companies

40 AI use cases relevant for rental companies, but non-exhaustive, have been identified

| 15 | Core business functions                                                                                                                                                                                                                                  |                                                                                                                                             |                                                                                                                                                                |                                                                                                                                                                               | 4                                                                                                                                                       | Transversal                                                                                                                                                                                            |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Sales & Aftersales                                                                                                                                                                                                                                       | Fleet Management                                                                                                                            | Operations                                                                                                                                                     | Maintenance                                                                                                                                                                   |                                                                                                                                                         | Daily tasks                                                                                                                                                                                            |
|    | <div>1 Online product comparison tool</div> <div>2 Customer chatbot</div> <div>3 Customer visits prioritization</div> <div>4 Tailored commercial plan</div> <div>5 Customer care analysis</div> <div>6 Claims classification &amp; smart rerouting</div> | <div>7 Supplier assessment</div> <div>8 Equipment &amp; spare parts inventory optimization</div> <div>9 Fleet management optimization</div> | <div>10 Delivery route optimization</div> <div>11 Rental demand forecasting</div>                                                                              | <div>12 Safety inspection support</div> <div>13 Incident pattern detection</div> <div>14 Maintenance assistant (reactive / preventive)</div> <div>15 Damage recognition</div> |                                                                                                                                                         | <div>37 AI-powered task automation</div> <div>38 Document intelligence &amp; knowledge management</div> <div>39 Automated report generation</div> <div>40 RFQ automation (vendor &amp; customer)</div> |
| 21 | Support functions                                                                                                                                                                                                                                        |                                                                                                                                             |                                                                                                                                                                |                                                                                                                                                                               |                                                                                                                                                         |                                                                                                                                                                                                        |
|    | Finance                                                                                                                                                                                                                                                  | HR                                                                                                                                          | IT                                                                                                                                                             | Marketing                                                                                                                                                                     | Legal                                                                                                                                                   | Strategy                                                                                                                                                                                               |
|    | <div>16 Automated billing validation</div> <div>17 Insurance risk modelling</div> <div>18 Asset profitability analysis</div> <div>19 Intelligent capital planning</div> <div>20 Pricing optimization</div> <div>21 Automated financial closing</div>     | <div>22 AI-powered recruitment</div> <div>23 Talent management optimization</div> <div>24 Payroll automation</div>                          | <div>25 Data harmonization</div> <div>26 Cybersecurity threat detection</div> <div>27 Internal support chatbot</div> <div>28 IT developments accelerator</div> | <div>29 Creation of SEO-optimized text content</div> <div>30 Multi-channel marketing campaign generation</div> <div>31 NPS / Brand sentiment analysis</div>                   | <div>32 Document compliance checker</div> <div>33 Client Risk profiling / Fraud prevention</div> <div>34 Contract lifecycle management automation</div> | <div>35 M&amp;A opportunity screening</div> <div>36 Automated market intelligence watch</div>                                                                                                          |

Click on business function names and use case numbers to access more details

Sources: ERA, KPMG Research & Analysis

Quick win Strategic recommendation

# Overview of top 40 most relevant AI use cases for rental companies



# Panorama of AI use cases relevant for rental companies (1/8)



Click to return to the  
panorama of use cases

| Functions     | 🛒 Sales & Aftersales                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                   |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use case      | 1 Online product comparison tool                                                                                                                                                                                        | 2 Customer chatbot                                                                                                                                                                                                                                                                                                                                                                          | 3 Customer visits prioritization                                                                                                                                                                                                                                                                                           | 4 Tailored commercial plan                                                                                                                                                                                                                                                                                                                     | 5 Customer care survey analysis                                                                                                                                                                                   |
| Outcome       | <p><i>Cf. p 39</i></p> <p>● Grow revenue / Cut cost<br/>Optimize operations<br/><b>Interact seamlessly</b><br/>Transform workforce<br/>Ensure compliance</p>                                                            | <p><i>Cf. p 40</i></p> <p>● Grow revenue / Cut cost<br/>Optimize operations<br/><b>Interact seamlessly</b><br/>Transform workforce<br/>Ensure compliance</p>                                                                                                                                                                                                                                | <p><i>Cf. p 41</i></p> <p>● Grow revenue / Cut cost<br/>Optimize operations<br/><b>Interact seamlessly</b><br/>Transform workforce<br/>Ensure compliance</p>                                                                                                                                                               | <p>● Grow revenue / Cut cost<br/>Optimize operations<br/><b>Interact seamlessly</b><br/>Transform workforce<br/>Ensure compliance</p>                                                                                                                                                                                                          | <p>● Grow revenue / Cut cost<br/>Optimize operations<br/><b>Interact seamlessly</b><br/>Transform workforce<br/>Ensure compliance</p>                                                                             |
| Objective     | <ul style="list-style-type: none"> <li>Help customers <b>compare equipment features and performance</b> (e.g., loading capacity, power system) to support informed decision-making during the rental process</li> </ul> | <ul style="list-style-type: none"> <li>Help customer <b>select adequate products</b> and right-size their fleet</li> <li>Answer <b>questions related to the rental process</b> (e.g., contract types, branch opening hours, equipment availability) and <b>equipment use</b> (e.g., configurations)</li> <li>Provide <b>personalized recommendations</b> based on customer needs</li> </ul> | <ul style="list-style-type: none"> <li><b>Score and rank customer accounts</b> based on urgency, strategic value, and churn risk (e.g., transaction frequency or engagement decline)</li> <li>Recommend <b>prioritized visit scheduling</b> across the portfolio to maximize retention and upsell opportunities</li> </ul> | <ul style="list-style-type: none"> <li>Analyze <b>outcomes of recent interactions</b> (visits, calls, emails)</li> <li>Recommend <b>next best action</b> (e.g., follow-up call, revisit, targeted promotion, marketing campaign)</li> <li><b>Automate personalized action plans</b> to improve conversion and customer satisfaction</li> </ul> | <ul style="list-style-type: none"> <li>Structure and analyze <b>customer feedback</b> to assess satisfaction and service quality</li> <li>Identify <b>improvement areas</b> and track sentiment trends</li> </ul> |
| Required data | <ul style="list-style-type: none"> <li>Product catalogue</li> <li>Equipment specs (e.g., engine type, load capacity)</li> </ul>                                                                                         | <ul style="list-style-type: none"> <li>Product catalog, equipment specs, availability data</li> <li>Contract terms and conditions</li> </ul>                                                                                                                                                                                                                                                | <ul style="list-style-type: none"> <li>Transactional data (rental history, payment records)</li> <li>Customer engagement metrics (e.g., CRM data, visit logs, satisfaction or complaint history)</li> </ul>                                                                                                                | <ul style="list-style-type: none"> <li>Sales records</li> <li>Customer engagement metrics (e.g., CRM data, visit logs)</li> </ul>                                                                                                                                                                                                              | <ul style="list-style-type: none"> <li>Survey responses (ratings, comments)</li> <li>Aftersales discussion feedbacks</li> <li>Online reviews</li> </ul>                                                           |

Sources: ERA, KPMG Research & Analysis

● Client-oriented UC

■ Quick win

■ Strategic recommendation

● Core business function

● Support function



# Panorama of AI use cases relevant for rental companies (2/8)

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| Functions     | Sales & Aftersales                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                    | Fleet Management                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                | Operations                                                                                                                                                                                                                            |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use case      | 6 Claims classification & smart rerouting                                                                                                                                                            | 7 Supplier assessment                                                                                                                                                                                                                                                                                              | 8 Equipment & spare parts inventory optimization                                                                                                                                                                                                                                                                                                                                      | 9 Fleet management optimization                                                                                                                                                                                                                                | 10 Delivery route optimization                                                                                                                                                                                                        |
| Outcome       | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br><b>Ensure compliance</b>                                                                      | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                                                                                           | <small>Cf. p 35</small><br>Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                                                                                                                                   | <small>Cf. p 31</small><br>Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                            | <small>Cf. p 32</small><br>Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                   |
| Objective     | <ul style="list-style-type: none"><li>Automatically <b>categorize incoming customer claims</b></li><li><b>Route claims</b> towards dynamic Q&amp;A page and/or teams for faster resolution</li></ul> | <ul style="list-style-type: none"><li><b>Evaluate OEMs</b> based on factors such as price, delivery time accuracy, quality of products/services provided, compliance to standards, and responsiveness</li><li><b>Recommend optimal sourcing strategies</b> by comparing OEM performance to market trends</li></ul> | <ul style="list-style-type: none"><li>Automate <b>inventory tracking of acquired, sold, out of service or rented equipment</b>, extracting asset-related data from invoices, contracts</li><li>Anticipate <b>equipment availability</b> and <b>schedule allocation</b> to meet demand by region and season</li><li>Anticipate <b>spare parts</b> demand and optimize stocks</li></ul> | <ul style="list-style-type: none"><li>Predict <b>optimal timing for equipment purchases</b> based on usage patterns and market conditions</li><li>Recommend when to <b>renew or retire assets</b> to maximize fleet performance and financial return</li></ul> | <ul style="list-style-type: none"><li>Optimize <b>scheduling, routing, and resource allocation</b> for field technicians</li><li><b>Visualize and optimize delivery and pick up routes</b> to customer sites using GPS data</li></ul> |
| Required data | <ul style="list-style-type: none"><li>Claim description, claim types, routing rules</li></ul>                                                                                                        | <ul style="list-style-type: none"><li>Supplier performance history (e.g., delivery delays, response time), product quality reports, compliance audits, market benchmarks</li></ul>                                                                                                                                 | <ul style="list-style-type: none"><li>Inventory database, rental booking schedules, asset records</li><li>Equipment availability forecasts (e.g., regional demand forecast, seasonal usage trends)</li></ul>                                                                                                                                                                          | <ul style="list-style-type: none"><li>Equipment usage logs (e.g., hours, fuel), market trends, asset age and depreciation records</li></ul>                                                                                                                    | <ul style="list-style-type: none"><li>GPS data, real-time traffic data, fleet schedules</li></ul>                                                                                                                                     |

Sources: ERA, KPMG Research & Analysis

 Quick win    Strategic recommendation    Core business function    Support function





# Panorama of AI use cases relevant for rental companies (3/8)

 [Click to return to the panorama of use cases](#)

| Functions     | Operations                                                                                                                                                                                                |                                                                                                                                                                                                                        | Maintenance                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                         |
|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use case      | 11 Rental demand forecasting                                                                                                                                                                              | 12 Safety inspection support                                                                                                                                                                                           | 13 Incident pattern detection                                                                                                                                                                                                                                                                                                                 | 14 Maintenance assistant (reactive / preventive)                                                                                                                                                                                                                                                                                               | 15 Damage recognition                                                                                                                                                                                                                   |
| Outcome       | <div>Cf. p 37</div> <div>Grow revenue / Cut cost</div> <div>Optimize operations</div> <div>Interact seamlessly</div> <div>Transform workforce</div> <div>Ensure compliance</div>                          | <div>Cf. p 33</div> <div>Grow revenue / Cut cost</div> <div>Optimize operations</div> <div>Interact seamlessly</div> <div>Transform workforce</div> <div>Ensure compliance</div>                                       | <div>Grow revenue / Cut cost</div> <div>Optimize operations</div> <div>Interact seamlessly</div> <div>Transform workforce</div> <div>Ensure compliance</div>                                                                                                                                                                                  | <div>Cf. p 36</div> <div>Grow revenue / Cut cost</div> <div>Optimize operations</div> <div>Interact seamlessly</div> <div>Transform workforce</div> <div>Ensure compliance</div>                                                                                                                                                               | <div>Cf. p 38</div> <div>Grow revenue / Cut cost</div> <div>Optimize operations</div> <div>Interact seamlessly</div> <div>Transform workforce</div> <div>Ensure compliance</div>                                                        |
| Objective     | <ul style="list-style-type: none"><li>Forecast <b>rental demand by region and season</b> using historical and external data</li><li>Support inventory planning and pricing strategies</li></ul>           | <ul style="list-style-type: none"><li>Identify <b>missing or outdated safety checks</b> conducted on equipment</li><li>Ensure <b>timely inspections</b> of equipment to meet safety and regulatory standards</li></ul> | <ul style="list-style-type: none"><li>Analyse historical incident data to identify <b>recurring safety issues</b></li><li><b>Trigger alert</b> to inspect other units of the same model across the fleet in case of an issue detected on a specific machine</li><li><b>Recommend preventive actions</b> and compliance improvements</li></ul> | <ul style="list-style-type: none"><li><b>Optimize reactive maintenance</b>: detect early signs of equipment failure using sensor data, classify repairment needs, route to the adequate maintenance operator</li><li><b>Schedule preventive maintenance</b> to reduce downtime and extend asset lifespan, based on predictive models</li></ul> | <ul style="list-style-type: none"><li><b>Streamline inspection process</b>, by <b>automatically checking equipment</b> in and out to assist staff in quickly identifying and documenting any damages before or after a rental</li></ul> |
| Required data | <ul style="list-style-type: none"><li>Historic rental data (volumes by equipment type, region, time)</li><li>External data (e.g., weather forecasts, construction permits, economic indicators)</li></ul> | <ul style="list-style-type: none"><li>Inspection checklists, safety logs, regulatory compliance records</li></ul>                                                                                                      | <ul style="list-style-type: none"><li>Incident logs (e.g., breakdowns), equipment model metadata, asset records, maintenance records, regulatory compliance records</li></ul>                                                                                                                                                                 | <ul style="list-style-type: none"><li>IoT sensor data, maintenance history, repair classification rules</li><li>Operator skillset, location and availability</li><li>Predictive maintenance models</li></ul>                                                                                                                                   | <ul style="list-style-type: none"><li>Equipment images (before/after rental), rental timestamps</li><li>Damage classification database, inspection history, equipment metadata (model, ID)</li></ul>                                    |

Sources: ERA, KPMG Research & Analysis

 Quick win  Strategic recommendation  Core business function  Support function





# Panorama of AI use cases relevant for rental companies (4/8)

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| Functions     | Finance                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                            |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use case      | 16 Automated billing validation                                                                                                                                                                                                                                                            | 17 Insurance risk modelling                                                                                                                                                                                      | 18 Asset profitability analysis                                                                                                                                                                                                                                                                                                                | 19 Intelligent capital planning                                                                                                                                                                                                                                                                                               | 20 Pricing optimization                                                                                                                                                                                                                                                                                                                                    |
| Outcome       | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br><b>Ensure compliance</b>                                                                                                                                                            | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                         | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                                                                                                                       | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                                                                                                      | Cf. p 34<br>Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                                                                                                                       |
| Objective     | <ul style="list-style-type: none"><li>• <b>Automatically generate invoices</b> collecting and structuring the data</li><li>• Automatically <b>approve for payment</b> or <b>flag for review</b> by cross-checking invoices against purchase orders, contracts, delivery receipts</li></ul> | <ul style="list-style-type: none"><li>• <b>Tailor insurance coverage</b> and premiums based on client profiles</li><li>• Predict <b>likelihood of claims / damage / incident</b> per asset or customer</li></ul> | <ul style="list-style-type: none"><li>• <b>Automate ROI and TCO calculations</b> for each equipment unit</li><li>• Determine the <b>minimum rental duration required</b> for each equipment unit to break even</li><li>• Conduct <b>scenario planning</b> to identify the impact of shifting resources allocation or changing prices</li></ul> | <ul style="list-style-type: none"><li>• <b>Analyze historical capital spending</b> data including financial performance and operational data</li><li>• <b>Recommend the most suitable capital spending</b> allocation factoring in <b>external drivers</b> (e.g., market trends) that may impact the strategic plan</li></ul> | <ul style="list-style-type: none"><li>• Adjust prices based on customers segment and <b>personalized pricing strategies</b> (e.g., promotions)</li><li>• Adjust prices <b>dynamically</b> based on real-time competitor activity, local demand (e.g., equipment category, rental length), and external factors such as weather and nearby events</li></ul> |
| Required data | <ul style="list-style-type: none"><li>• Invoice files, purchase orders, contracts, delivery receipts, invoice status rules</li></ul>                                                                                                                                                       | <ul style="list-style-type: none"><li>• Claim history, asset profiles, customer risk data, insurance coverage details</li></ul>                                                                                  | <ul style="list-style-type: none"><li>• Financial statements, asset inventories</li><li>• Equipment acquisition cost, usage data, ROI/TCO models</li></ul>                                                                                                                                                                                     | <ul style="list-style-type: none"><li>• Financial KPIs, capex history, market trends, macroeconomic indicators</li></ul>                                                                                                                                                                                                      | <ul style="list-style-type: none"><li>• Market &amp; demand data (real-time rental demand, historical pricing)</li><li>• Competitor pricing</li><li>• Asset data (e.g., equipment availability, rent frequency)</li></ul>                                                                                                                                  |

Sources: ERA, KPMG Research & Analysis

 Quick win    Strategic recommendation    Core business function    Support function





# Panorama of AI use cases relevant for rental companies (5/8)

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| Functions     | Finance                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                | HR                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                | IT                                                                                                                                                                                                                                                                                                                                         |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use case      | 21 Automated Financial closing                                                                                                                                                                                                                       | 22 AI-powered recruitment                                                                                                                                                                                                                                                                                      | 23 Talent management optimization                                                                                                                                                                                                                                                                    | 24 Payroll automation                                                                                                                                                                                                                                                                                                                          | 25 Data harmonization                                                                                                                                                                                                                                                                                                                      |
| Outcome       | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                             | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br><b>Transform workforce</b><br>Ensure compliance                                                                                                                                                                                | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br><b>Transform workforce</b><br>Ensure compliance                                                                                                                                                                      | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                                                                                                                       | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                                                                                                                   |
| Objective     | <ul style="list-style-type: none"><li>Automate <b>matching of transactions</b> across accounts and systems</li><li>Detect and <b>flag discrepancies</b> or missing entries</li><li><b>Streamline</b> monthly or year-end closing processes</li></ul> | <ul style="list-style-type: none"><li>Draft <b>job requisitions</b></li><li><b>Analyse CVs</b>, screen and rank candidates based on job fit</li><li><b>Assist the interviewer</b> during candidate interviews by providing targeted questions</li><li>Test candidates</li><li>Generate offer letters</li></ul> | <ul style="list-style-type: none"><li>Oversee and support employees throughout their career journey <b>from onboarding to career development</b></li><li><b>Develop tailored</b> online workforce <b>trainings matching operational needs</b>, effective through tracking and gamification</li></ul> | <ul style="list-style-type: none"><li><b>Classify</b> payroll documents (e.g., timesheets, leave requests) and <b>validate</b> inputs against employee contracts and policies</li><li><b>Flag anomalies</b> (e.g., missing approvals, excessive overtime)</li><li>Automate payroll <b>calculations</b> and payment <b>scheduling</b></li></ul> | <ul style="list-style-type: none"><li>Clean and <b>unify data across systems</b> to improve consistency and reporting</li><li>Identify and consolidate duplicates, <b>fix</b> formatting issues, missing values and inconsistent naming</li><li>Ensure real-time <b>synchronization</b> and enable <b>cross-system analytics</b></li></ul> |
| Required data | <ul style="list-style-type: none"><li>Transactional data (e.g., journal entries, bank statements)</li><li>System data (e.g., exports from ERP or accounting tools)</li></ul>                                                                         | <ul style="list-style-type: none"><li>Job descriptions, CVs, interview scores, test results</li></ul>                                                                                                                                                                                                          | <ul style="list-style-type: none"><li>HR database (e.g., tenure, reviews), employee surveys, career paths, onboarding checklist</li><li>Skill matrix, job role requirements, learning platform data</li></ul>                                                                                        | <ul style="list-style-type: none"><li>Payroll documents and employee profiles, contracts</li><li>Payroll rules and validation logic, payment schedules and exception handling rules</li></ul>                                                                                                                                                  | <ul style="list-style-type: none"><li>Rental system data (e.g., ERP, CRM), schema definitions, data quality metrics</li></ul>                                                                                                                                                                                                              |

Sources: ERA, KPMG Research & Analysis

 Quick win    Strategic recommendation    Core business function    Support function







# Panorama of AI use cases relevant for rental companies (6/8)

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| Functions     | IT                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                  | Marketing                                                                                                                                                                                                                                                                        |                                                                                                                                                                    |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use case      | 26 Cybersecurity threat detection                                                                                                                                                                                                                                                                                                                                      | 27 Internal support chatbot                                                                                                                                                                                           | 28 IT developments accelerator                                                                                                                                                                                                                                                                                                                   | 29 Creation of SEO-optimized text content                                                                                                                                                                                                                                        | 30 Multi-channel marketing campaign generation                                                                                                                     |
| Outcome       | <div>Cf. p 41</div> <div>Grow revenue / Cut cost</div> <div>Optimize operations</div> <div>Interact seamlessly</div> <div>Transform workforce</div> <div>Ensure compliance</div>                                                                                                                                                                                       | <div>Grow revenue / Cut cost</div> <div>Optimize operations</div> <div>Interact seamlessly</div> <div>Transform workforce</div> <div>Ensure compliance</div>                                                          | <div>Grow revenue / Cut cost</div> <div>Optimize operations</div> <div>Interact seamlessly</div> <div>Transform workforce</div> <div>Ensure compliance</div>                                                                                                                                                                                     | <div>Grow revenue / Cut cost</div> <div>Optimize operations</div> <div>Interact seamlessly</div> <div>Transform workforce</div> <div>Ensure compliance</div>                                                                                                                     | <div>Grow revenue / Cut cost</div> <div>Optimize operations</div> <div>Interact seamlessly</div> <div>Transform workforce</div> <div>Ensure compliance</div>       |
| Objective     | <ul style="list-style-type: none"><li>Monitor systems for <b>suspicious activity</b>: detect unusual login patterns, data access, or system behavior and automatically notify IT/security teams of potential breaches</li><li>Simulate <b>phishing attacks</b>: test employee response to fake phishing emails, provide training based on simulation results</li></ul> | <ul style="list-style-type: none"><li>Provide employees with instant <b>answers, especially to IT and HR questions</b> using AI-powered chatbots</li><li>Reduce support workload and improve responsiveness</li></ul> | <ul style="list-style-type: none"><li><b>Automate repetitive development tasks</b> (e.g., ticketing, testing, code optimization) to free up developer time and reduce both dev. costs and time-to-market</li><li><b>Structure and build add-ons / websites / tools / app prototypes</b> through guided interfaces or low/no-code tools</li></ul> | <ul style="list-style-type: none"><li>Generate multilingual, SEO-optimized content using <b>high-ranking keywords</b> to boost website traffic and visibility</li><li>Create <b>engaging app store content</b> (ASO) to improve app discoverability and attractiveness</li></ul> | <ul style="list-style-type: none"><li>Automatically <b>generate marketing campaigns</b> across channels, with tailored messages and assets by audience</li></ul>   |
| Required data | <ul style="list-style-type: none"><li>System logs, login records, access logs, network traffic, email metadata, known threat patterns</li></ul>                                                                                                                                                                                                                        | <ul style="list-style-type: none"><li>IT/HR knowledge base, employee queries, chatbot logs</li></ul>                                                                                                                  | <ul style="list-style-type: none"><li>Business requirements (user stories, workflows, ...)</li><li>Repetitive dev tasks (e.g., ticketing, testing, optimization)</li></ul>                                                                                                                                                                       | <ul style="list-style-type: none"><li>Website/app content, target keywords per language, SEO performance data, app store metadata, supported languages</li></ul>                                                                                                                 | <ul style="list-style-type: none"><li>Customer profiles, campaign templates, channel performance data, social media activity logs, brand tone guidelines</li></ul> |

Sources: ERA, KPMG Research & Analysis

 Quick win  Strategic recommendation  Core business function  Support function







# Panorama of AI use cases relevant for rental companies (7/8)

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| Functions     | Marketing                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                                                | Legal                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                | Strategy                                                                                                                                                                           |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use case      | 31 NPS / Brand sentiment analysis                                                                                                                                                                                                           | 32 Document compliance checker                                                                                                                                                                                                                                                                                                                                 | 33 Client Risk profiling / Fraud prevention                                                                                                                                                                                                                                                                                      | 34 Contract lifecycle management automation                                                                                                                                                    | 35 M&A opportunity screening                                                                                                                                                       |
| Outcome       | Grow revenue / Cut cost<br>Optimize operations<br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                           | Grow revenue / Cut cost<br>Optimize operations<br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                                                                                                                                              | ● Grow revenue / Cut cost<br>Optimize operations<br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                                                                                                              | Grow revenue / Cut cost<br>Optimize operations<br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                              | Grow revenue / Cut cost<br>Optimize operations<br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                  |
| Objective     | <ul style="list-style-type: none"><li>Monitor <b>online reputation</b> and customer sentiment across platforms (social media, reviews, forums)</li><li>Measure <b>Net Promoter Score</b> and identify areas for brand improvement</li></ul> | <ul style="list-style-type: none"><li>Streamline the client onboarding process by automatically <b>validating customer-provided documents</b> (e.g., KYC, insurance certificates, licenses) against legal and operational standards</li><li><b>Flag missing, expired, or non-compliant</b> documents to prevent operational risks and legal exposure</li></ul> | <ul style="list-style-type: none"><li>Utilizes machine learning to <b>analyze client financial data</b>, investment history, and behavioral patterns to <b>create accurate risk profiles</b>, ensuring investments are aligned with client risk tolerance</li><li>Forecast <b>potential payment delays or defaults</b></li></ul> | <ul style="list-style-type: none"><li>Streamline <b>drafting, approval, and renewal</b> processes</li><li>Detect <b>contract anomalies</b> and ensure legal and financial compliance</li></ul> | <ul style="list-style-type: none"><li>Identify <b>potential acquisition targets</b> using public and internal data sources</li><li>Conduct <b>AI-based due diligence</b></li></ul> |
| Required data | <ul style="list-style-type: none"><li>Social media &amp; online mentions</li><li>Brand performance metrics (NPS scores, brand indexes from third party analytics)</li></ul>                                                                 | <ul style="list-style-type: none"><li>Onboarding forms</li><li>KYC databases, certificates</li><li>Contract templates, approval workflows, renewal dates, compliance checklists</li></ul>                                                                                                                                                                      | <ul style="list-style-type: none"><li>Financial statements, investment history, payment timelines, overdue records, risk indicators</li></ul>                                                                                                                                                                                    | <ul style="list-style-type: none"><li>Contract documents, approval workflows, compliance rules, renewal timelines</li></ul>                                                                    | <ul style="list-style-type: none"><li>Financial statements, performance KPIs, acquisition criteria</li></ul>                                                                       |

Sources: ERA, KPMG Research & Analysis

● Client-oriented UC    Quick win    Strategic recommendation    Core business function    Support function





# Panorama of AI use cases relevant for rental companies (8/8)

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| Functions     | Strategy                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                          | Transversal                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                        |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use case      | 36 Automated market intelligence watch                                                                                                                                                                                                                                                                                                               | 37 AI-powered task automation                                                                                                                                                                                            | 38 Document intelligence & knowledge management                                                                                                                                                                                                                                                     | 39 Automated report generation                                                                                                                                                                                        | 40 RFQ automation (vendor & customer)                                                                                                                                                                                                                                                                                                                                  |
| Outcome       | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br><b>Ensure compliance</b>                                                                                                                                                                                                                      | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br><b>Transform workforce</b><br>Ensure compliance                                                                                          | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br><b>Transform workforce</b><br>Ensure compliance                                                                                                                                                                     | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br><b>Transform workforce</b><br>Ensure compliance                                                                                       | Grow revenue / Cut cost<br><b>Optimize operations</b><br>Interact seamlessly<br>Transform workforce<br>Ensure compliance                                                                                                                                                                                                                                               |
| Objective     | <ul style="list-style-type: none"><li>Automatically monitor and analyse <b>market trends</b>, <b>competitive landscape</b>, and <b>sector-specific developments</b></li><li>Automatically watch <b>tender platforms</b> to detect relevant opportunities</li><li>Monitor <b>regulatory changes</b> and alert teams to non-compliance risks</li></ul> | <ul style="list-style-type: none"><li>Automate low-value repetitive tasks such as <b>email sorting</b>, <b>meeting transcriptions</b>, <b>summaries</b>, and <b>reminders</b> to improve employee productivity</li></ul> | <ul style="list-style-type: none"><li>Simplify <b>access to internal and external knowledge</b> bases (e.g., inventories records), centralized on a <b>unique data platform</b></li><li><b>Automatically retrieve</b>, <b>translate</b>, <b>summarize</b> recurring documents and queries</li></ul> | <ul style="list-style-type: none"><li>Automate the creation and distribution of <b>business reports</b> using AI tools</li><li>Make <b>tailored recommendations</b>, provide <b>visually impactful data</b></li></ul> | <ul style="list-style-type: none"><li><b>Extract</b> client RFQs from online channels, and <b>prioritize high-value ones</b> and suggest <b>automated responses</b> (e.g., pricing, terms)</li><li>Automatically <b>generate supplier RFQs</b>; <b>compare</b> responses and <b>recommend</b> the best options (e.g., based on cost, lead time, reliability)</li></ul> |
| Required data | <ul style="list-style-type: none"><li>News feeds, competitor websites, regulatory bulletins, tender APIs</li></ul>                                                                                                                                                                                                                                   | <ul style="list-style-type: none"><li>Keyword databases, multilingual content libraries, traffic analytics</li></ul>                                                                                                     | <ul style="list-style-type: none"><li>Knowledge base content, document repositories, query logs, language preferences, metadata schemas</li></ul>                                                                                                                                                   | <ul style="list-style-type: none"><li>Business data sources, reporting templates</li></ul>                                                                                                                            | <ul style="list-style-type: none"><li>Client requests (e.g., emails, platforms), historical RFQ data (e.g., pricing, terms)</li><li>Equipment data (e.g., stock)</li><li>Supplier catalogs &amp; profiles (e.g., availability, reliability, lead times)</li></ul>                                                                                                      |

Sources: ERA, KPMG Research & Analysis

 Quick win    Strategic recommendation    Core business function    Support function





for



# Contents

01 – Introduction to AI

02 – Panorama of most relevant AI use cases for rental companies

**03 – Preliminary top priorities for rental companies**

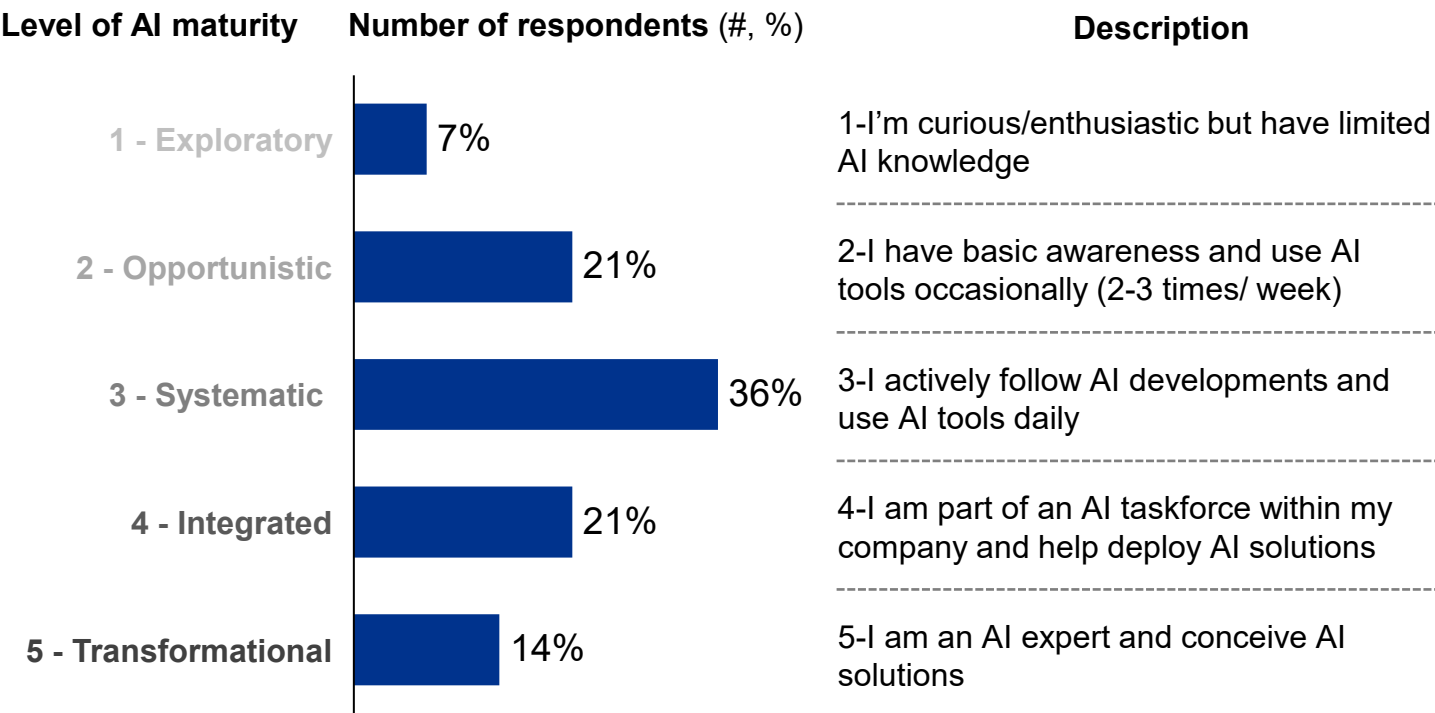
04 – Global AI implementation recommendations

05 – Appendix

# 17 respondents from 10 rental companies provided their vision on most relevant AI use cases for their industry; ~70% of them having expertise in data, digital or IT

## Respondents by perceived individual AI maturity

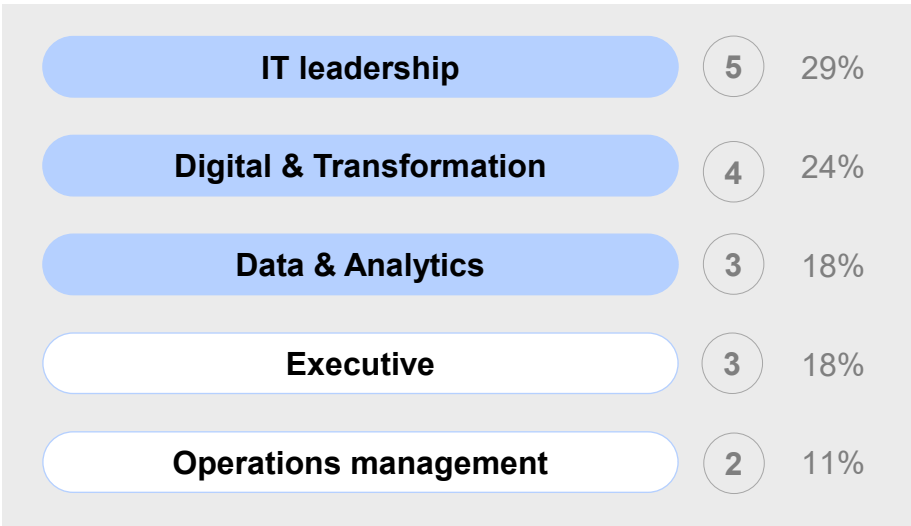
→ **Question asked:** How would you describe your personal familiarity with AI topics? Please select an option, from 1: AI-enthusiastic to 5: AI expert



## Companies of the respondents



## Respondents by type of job (#, %)



Sources: LinkedIn, Corporate websites, KPMG Research & Analysis

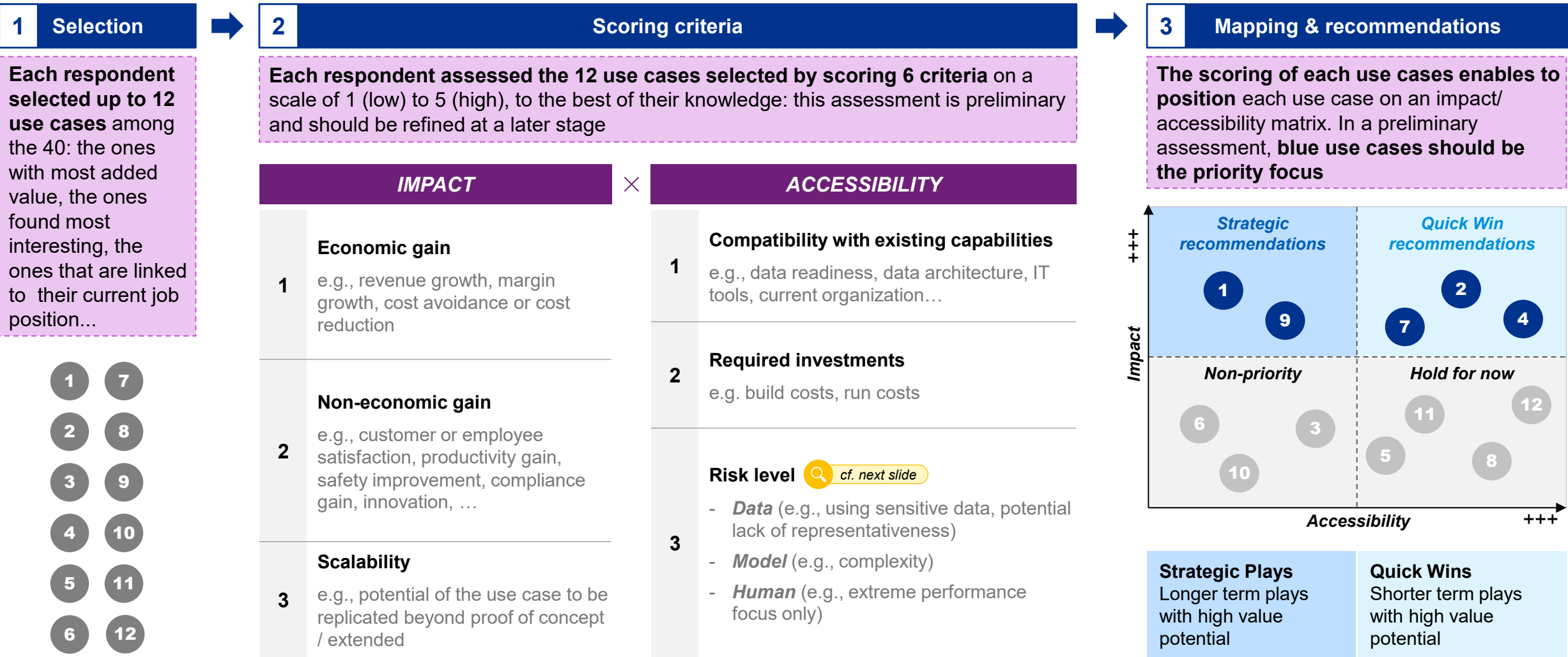


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Top respondents   AI-oriented   Business-oriented

# They selected 12 use cases among 40 and prioritized them using an impact / accessibility assessment, through 6 key criteria

## Prioritization methodology breakdown



Sources: ERA, KPMG Research & Analysis

# Those criteria encapsulated a preliminary assessment of AI-related risks, covering data, model and human-related risks

Zoom AI risks

## Types of AI-related risks

|             | DATA                                                                                                                                                                                                                | MODEL                                                                                                                                                                            | HUMAN                                                                                                                                                                                                                              |
|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| MAIN RISKS  | <ul style="list-style-type: none"><li>Lack of <b>representativeness</b></li><li><b>Intellectual property</b> infringement</li><li><b>Sensitive/confidential</b> data</li><li>Data <b>quality</b> problems</li></ul> | <ul style="list-style-type: none"><li>Use of <b>non-optimized</b> models</li><li>Inadequate <b>security</b></li><li>Lack of <b>explicability</b> and <b>complexity</b></li></ul> | <ul style="list-style-type: none"><li><b>Dehumanized</b> processes</li><li><b>Extreme performance focus only</b> (over human/CSR considerations)</li><li><b>Confirmation bias</b> through lack of awareness and training</li></ul> |
| KEY IMPACTS | <ul style="list-style-type: none"><li><b>Unusable/ inaccurate</b> data</li><li><b>Legal actions</b></li></ul>                                                                                                       | <ul style="list-style-type: none"><li><b>Hallucinations</b></li><li><b>Cyberattack</b></li><li><b>Unusable</b> data</li></ul>                                                    | <ul style="list-style-type: none"><li><b>Safety, ethical</b> and <b>social</b> impact</li><li><b>Over-reliance</b> on AI</li><li><b>Significant consumption</b> of energy resources</li></ul>                                      |

Most AI-related risks can be mitigated with proper human supervision

## Illustrative risk mitigation approach

### When implementing an AI chatbot for HR...

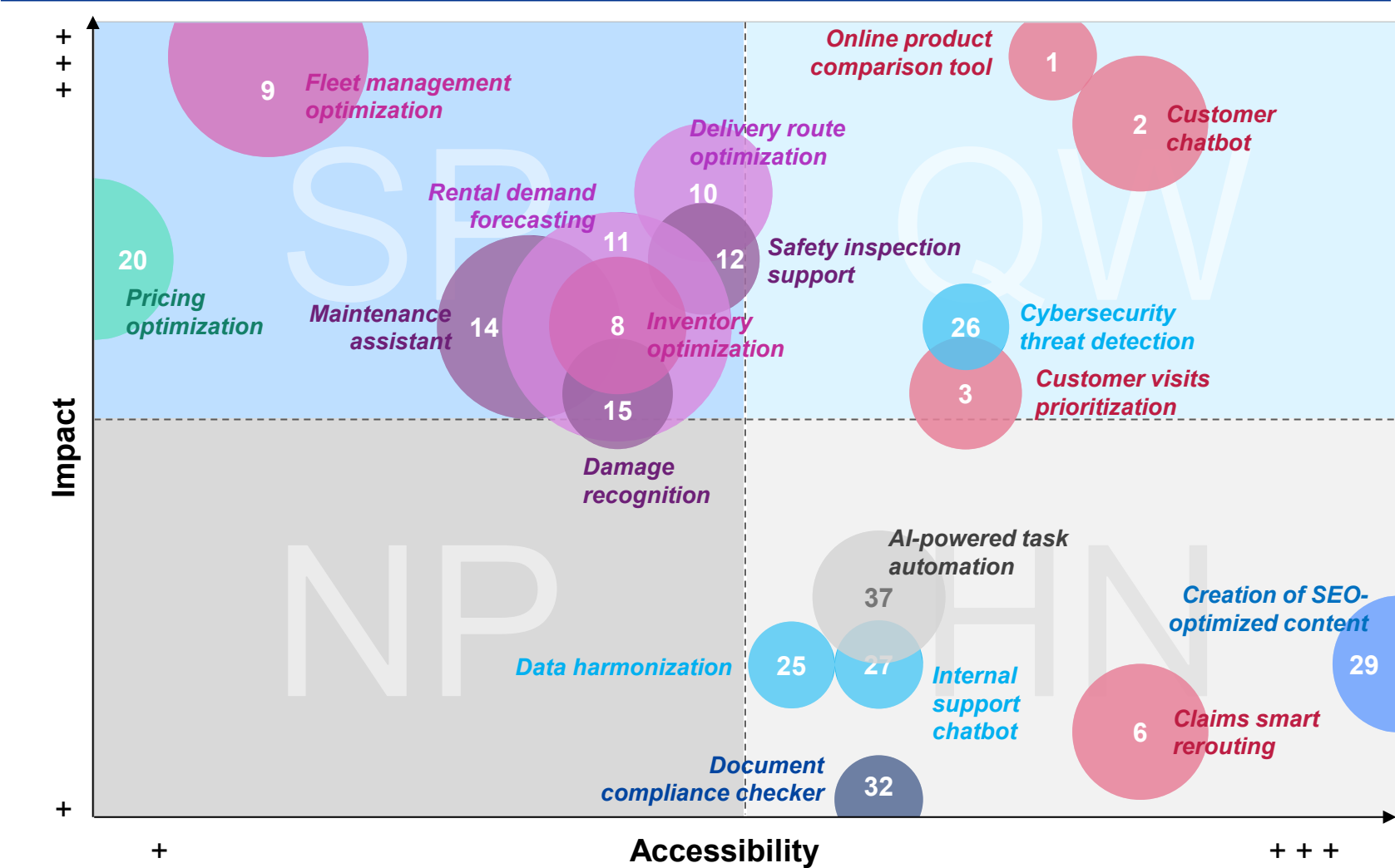
- ...The **confidentiality** of employee-related data induces ethical and legal issues
  - It can be mitigated by **training teams to be aware** of the importance of confidentiality
- ...The developed solution risks being a **sub-optimal** search engine
  - It can be mitigated by ensuring **queries go beyond most frequently asked questions**
- ...The reduction of human interaction hinders **the personal aspect** of the process
  - It can be mitigated by integrating the **possibility of making appointments with the HR**

Sources: ERA, KPMG Research & Analysis



# Fleet management, Operations and Maintenance-related AI use cases are considered the most strategic to address, despite high implement barriers

Prioritization matrix of top use cases (selected 4 times or more)



Sources: ERA, KPMG Research & Analysis



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## Comments

- Out of 40 AI use cases:
  - 8 strategic use cases (7 of which are core business related)
  - 4 quick wins (3 core business)
- Top 4 picks are:
  - 11 Inventory optimization (10 votes)
  - 9 Fleet management optimization (9 votes)
  - 14 Maintenance assistant (8 votes)
  - 20 Pricing optimization (7 votes)

SP

Strategic Plays

QW

Quick Wins

NP

Non-Priority

HN

Hold for Now

Core business functions

Sales & AS (4)

Fleet management (2)

Operations (2)

Maintenance (3)

Support functions

Finance (1)

IT (3)

Marketing (1)

Legal (1)

Transversal (1)

Number of respondents

31

9

Fleet management optimization

Fleet mgmt



Click to return to the description of use cases

Use case description



CHALLENGE ADDRESSED

- **Limited visibility on fleet condition** and performance across branches
- **Lack of centralized insights**, relying on manual processes over data-driven decisions
- Unclear demand patterns, making **purchase and resale decisions difficult**
- High costs from **underutilized assets** and **delayed fleet renewal**



BENEFITS

- **Cost reduction** through optimized purchase and renewal cycles
- **Higher financial returns** by maximizing asset lifecycle and resale value
- **Improved fleet utilization** and reduced idle time, in alignment with operational needs

Towards implementation

IMPACT\*

3,8 / 5

ACCESSIBILITY\*

2,7 / 5

Economic gain

4,3 / 5

Compatibility w/ assets

2,8 / 5

Non-economic gain

3,7 / 5

Required investments

2,4 / 5

Scalability

3,4 / 5

Risk level

2,9 / 5

*DISCLAIMER: The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined*

ESTIMATED MATURITY OF THE SOLUTIONS



Very limited, exploratory



Few live business cases



Multiple providers

Prerequisites

- **Asset data:** usage logs (hours, fuel, maintenance history), age, depreciation records, and residual value
- **Market trend information:** pricing, demand forecasts, and economic indicators
- Integration with **fleet management or ERP systems**
- AI/Machine learning models to analyze patterns and **predict optimal timing for purchases or retirements**

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis



Limited



Moderate



High

10

Delivery route optimization

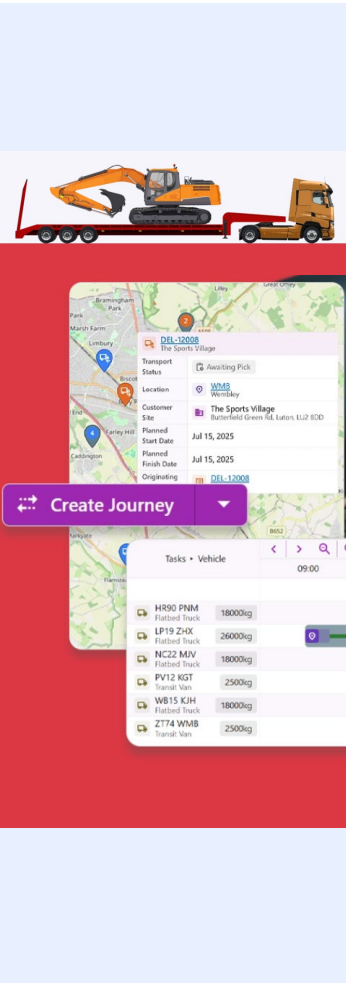
Operations



Click to return to the description of use cases

Strategic play

Use case description



CHALLENGE ADDRESSED

- High operational costs due to **non-optimized routes** (fuel, driving time, maintenance)
- **Delivery and pickup delays** impacting customer satisfaction
- Difficulty managing **unexpected events** (traffic, cancellations) with static schedules
- **Inefficient resource utilization** (vehicles, drivers) caused by manual planning



BENEFITS

- **Lower operational costs** (fuel, overtime)
- Improved on-time delivery and **customer satisfaction**
- **Increased productivity** through better resource allocation
- **Real-time visibility** to adjust routes based on traffic or weather conditions
- **Reduced carbon footprint** thanks to optimized routes

Towards implementation

| IMPACT*           | 3,6 / 5 | ACCESSIBILITY*          | 3,2 / 5 |
|-------------------|---------|-------------------------|---------|
| Economic gain     | 3,7 / 5 | Compatibility w/ assets | 3,2 / 5 |
| Non-economic gain | 3,5 / 5 | Required investments    | 2,8 / 5 |
| Scalability       | 3,7 / 5 | Risk level              | 3,5 / 5 |

*DISCLAIMER: The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined*

ESTIMATED MATURITY OF THE SOLUTIONS



Very limited, exploratory



Few live business cases



Multiple providers

Prerequisites

- **Vehicle & route data:** GPS data, real-time traffic information, delivery/pickup schedules
- Integration with **fleet management or ERP systems**
- **Mobile connectivity** for drivers for dynamic route updates
- AI/Machine learning algorithms to analyze traffic patterns, predict delays and **optimize route planning**

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis



Limited



Moderate



High

12

Safety inspection support

Maintenance



Click to return to the description of use cases

Use case description



CHALLENGE ADDRESSED

- Missed or outdated safety checks create compliance risks and **potential accidents**
- **Inefficient manual inspection processes**, impacting customer experience and productivity
- Lack of documented inspections increases **fraud risk and financial losses**
- Non-compliance exposes companies to **finances and costly delay**



BENEFITS

- **Reduced risk of accidents and improved customer safety** through timely, systematic inspections
- Faster, automated workflows **enhance customer experience** and **minimize downtime**
- **Reduced financial losses** via documented equipment condition and fraud prevention
- **Compliance assurance** reduces risk of penalties and costly disruptions

Towards implementation

| IMPACT*           | 3,5 / 5 | ACCESSIBILITY*          | 3,2 / 5 |
|-------------------|---------|-------------------------|---------|
| Economic gain     | 3,2 / 5 | Compatibility w/ assets | 3,2 / 5 |
| Non-economic gain | 3,8 / 5 | Required investments    | 2,4 / 5 |
| Scalability       | 3,4 / 5 | Risk level              | 4,0 / 5 |

*DISCLAIMER: The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined*

ESTIMATED MATURITY OF THE SOLUTIONS



Very limited, exploratory



Few live business cases



Multiple providers

Prerequisites

- **Inspection data:** checklists, safety logs
- **Compliance records:** regulatory standards and certification documentation
- Integration with **fleet management or ERP systems**
- **Digital tools** for scheduling and tracking inspections
- AI/ Machine learning models to **identify** gaps and **predict inspection needs**

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis



Limited



Moderate



High

20

Pricing optimization

Finance



Click to return to the description of use cases

Strategic play

Use case description



CHALLENGE ADDRESSED

- Static pricing models failing to capture **real-time market fluctuations**, leading to:
  - **Slow responsiveness to competitor** price adjustments
  - Revenue loss due to **underpricing** during high demand or **overpricing** during low demand
- **Lack of personalization** for different customer segments



BENEFITS

- **Increased revenue** through dynamic and personalized pricing strategies
- **Improved competitiveness** by reacting to market and competitor changes in real time
- **Enhanced customer experience** with tailored promotions and offers
- **Optimized asset utilization** by aligning pricing with demand and availability

Towards implementation

IMPACT\*

3,5 / 5

Economic gain

4,6 / 5

Non-economic gain

2,6 / 5

Scalability

3,3 / 5

ACCESSIBILITY\*

2,5 / 5

Compatibility w/ assets

2,6 / 5

Required investments

2,0 / 5

Risk level

2,9 / 5

*DISCLAIMER: The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined*

ESTIMATED MATURITY OF THE SOLUTIONS



Very limited, exploratory



Few live business cases



Multiple providers

Prerequisites

- **Market and demand data:** real-time rental demand, historical pricing
- **Competitor pricing information**
- **Asset data:** equipment availability, rental frequency
- Integration with **pricing/ booking and ERP systems**
- AI/ Machine learning models to **adjust prices dynamically**

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis



Limited



Moderate



High



8

# Equipment & spare parts inventory optimization

Fleet mgmt



Click to return to the description of use cases

Strategic play

## Use case description



### CHALLENGE ADDRESSED

- **Inefficient manual inventory tracking** that is **time-consuming** and prone to errors
- **Complex anticipation of equipment availability** and **asset allocation** across regions and seasons
- Inefficient spare parts management leading to **stock shortages or excess inventory**
- **Limited visibility into asset status**, causing delays, operational inefficiencies, and increased risk of theft



### BENEFITS

- **Automated tracking of equipment status** (acquired, sold, rented, out of service) for real-time visibility improving operational efficiency and preventing theft
- **Cost reduction** by minimizing shortages and overstock through better planning
- **Optimized allocation** of equipment and spare parts by forecasting availability and demand

## Towards implementation



### IMPACT\*

3,4 / 5

Economic gain

3,7 / 5

Non-economic gain

3,3 / 5

Scalability

3,3 / 5



### ACCESSIBILITY\*

3,1 / 5

Compatibility w/ assets

3,3 / 5

Required investments

1,8 / 5

Risk level

4,2 / 5

**DISCLAIMER:** The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined

### ESTIMATED MATURITY OF THE SOLUTIONS



Very limited, exploratory



Few live business cases



Multiple providers

### Prerequisites

- **Inventory database** and **asset records**
- Rental **booking schedules** and **maintenance history**
- Integration with **fleet management** or **ERP systems**
- AI/ Machine learning models to **predict shortages/ overstock** and **optimize allocation** of equipment and spare parts

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis



Limited



Moderate



High



14

Maintenance assistant (reactive / preventive)

Maintenance



Click to return to the description of use cases

Strategic play

Use case description



CHALLENGE ADDRESSED

- Unplanned equipment failures causing **costly downtime and delays**
- **Inefficient manual** maintenance scheduling, reducing productivity
- Difficulty predicting failures and **prioritizing repairs** across large fleets
- **Limited visibility into asset health**, leading to reduced lifespan and compliance risks



BENEFITS

- **Early detection of equipment issues** through sensor data
- **Reduced downtime and extended asset lifespan** via preventive maintenance
- **Improved operational efficiency** with automated scheduling and task routing
- **Enhanced visibility and control** over maintenance activities and thus asset management

Towards implementation

IMPACT\*

3,4 / 5

ACCESSIBILITY\*

3 / 5

Economic gain

3,9 / 5

Compatibility w/ assets

2,6 / 5

Non-economic gain

3,3 / 5

Required investments

2,5 / 5

Scalability

3,0 / 5

Risk level

4,0 / 5

*DISCLAIMER: The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined*

ESTIMATED MATURITY OF THE SOLUTIONS



Very limited, exploratory



Few live business cases



Multiple providers

Prerequisites

- **Equipment data:** real-time IoT sensor readings and historical maintenance records
- **Operator info:** skillset, location, and availability data
- Integration with **fleet management or ERP systems**
- AI/ Machine learning **models to detect** failures and **plan preventive maintenance** schedule

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis



Limited



Moderate



High

11

Rental demand forecasting

Operations



Click to return to the description of use cases

Strategic  
play

Use case description



CHALLENGE ADDRESSED

- Without demand forecast, the lack of forward visibility can lead to:
  - inefficient asset allocation**, with costly overstock and missed rentals
  - missed revenue opportunities** without efficient price adjustment to demand
- With manual forecasting, the limited data risks leading to **time-consuming and inaccurate predictions**



BENEFITS

- Accurate demand forecasts** using historical and external data at varied granular levels (by category, by geography, by season, ..., daily, quarterly, yearly)
- Optimized inventory planning and asset allocation** by region and season
- Improved pricing strategies** aligned with market demand

Towards implementation



3,4 / 5



3,1 / 5

Economic gain

3,4 / 5

Compatibility w/ assets

2,8 / 5

Non-economic gain

3,1 / 5

Required investments

3,0 / 5

Scalability

3,6 / 5

Risk level

3,6 / 5

**DISCLAIMER:** The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined

ESTIMATED MATURITY OF THE SOLUTIONS



Very limited,  
exploratory



Few live  
business cases



Multiple  
providers

Prerequisites

- Historic rental data:** volumes by equipment type, region, and time to identify patterns
- External data sources:** weather forecasts, construction permits, concrete sales, economic indicators
- Integration with **pricing/booking CRM and ERP systems**
- AI/ Machine learning algorithms to **predict demand at granular level** (e.g. by region, season)

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis



Limited



Moderate



High



15

Damage recognition

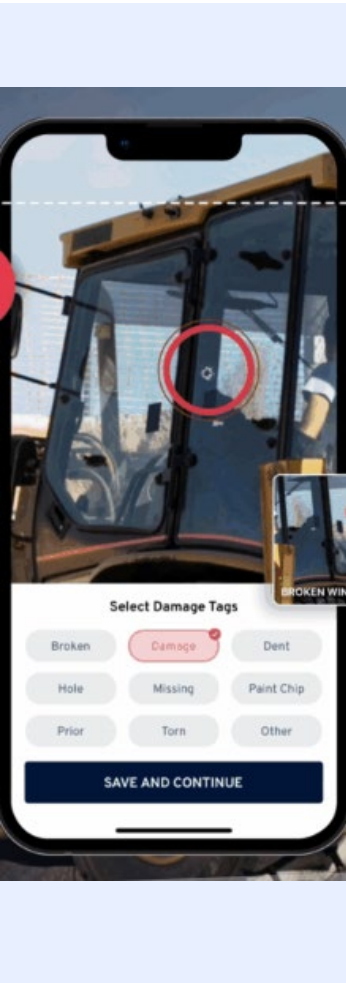
Maintenance



Click to return to the description of use cases

Strategic play

Use case description



CHALLENGE ADDRESSED

- Manual inspections are slow and error-prone, causing **missed or undocumented damages**
- Poor documentation increases **disputes and financial losses**



BENEFITS

- **Accurate damage detection** with automated image checks
- **Reduced fraud and liability risks** through better traceability
- Streamlined workflows **saving time** and **improving customer experience**

Towards implementation

| IMPACT*           | 3,3 / 5 | ACCESSIBILITY*          | 3,1 / 5 |
|-------------------|---------|-------------------------|---------|
| Economic gain     | 3,4 / 5 | Compatibility w/ assets | 2,6 / 5 |
| Non-economic gain | 3,4 / 5 | Required investments    | 2,6 / 5 |
| Scalability       | 3,0 / 5 | Risk level              | 4,0 / 5 |

*DISCLAIMER: The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined*

ESTIMATED MATURITY OF THE SOLUTIONS



Very limited, exploratory



Few live business cases



Multiple providers

Prerequisites

- **Equipment images** before/ after rental
- **Equipment metadata** (model, ID) and rental timestamps for traceability
- **Damage classification database** and historical inspection records for accurate identification
- **Integration with fleet management or ERP systems** to link inspection with contracts, billing
- AI/ Machine learning models to **detect** and **classify** damages automatically

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis



Limited



Moderate



High



1

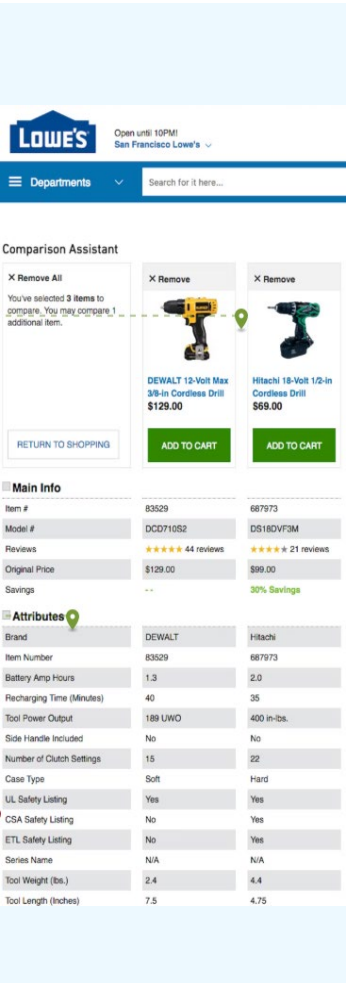
# Online product comparison tool



Click to return to the description of use cases

Quick win

## Use case description



### CHALLENGE ADDRESSED

- **Long decision-making process** without a comparison tool, slowing down rentals
- **Difficulty identifying the right equipment** for specific needs, creating uncertainty
- **Poor customer experience** due to lack of clarity and transparency in options



### BENEFITS

- **Simplified comparison** of equipment features and performance for informed decisions
- **Improved customer confidence** through clear, transparent specifications
- **Opportunity for upselling** by highlighting alternative or premium options (e.g., electric models), increasing revenue
- **Faster rental process** thanks to streamlined online comparison

## Towards implementation

### IMPACT\*

3,8 / 5

### ACCESSIBILITY\*

3,6 / 5

Economic gain

3,3 / 5

Compatibility w/ assets

2,8 / 5

Non-economic gain

3,3 / 5

Required investments

3,5 / 5

Scalability

4,8 / 5

Risk level

4,5 / 5

*DISCLAIMER: The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined*

### ESTIMATED MATURITY OF THE SOLUTIONS



Very limited, exploratory



Few live business cases



Multiple providers

### Prerequisites

- Comprehensive **product catalog** with accurate and up-to-date equipment details
- **Structured equipment specifications** (engine type, load capacity, power system)
- **Integration with online rental platform** for real-time availability and pricing
- AI/ Machine learning models to enable **dynamic comparison** and **highlight optimal options**

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis



Limited



Moderate



High



2

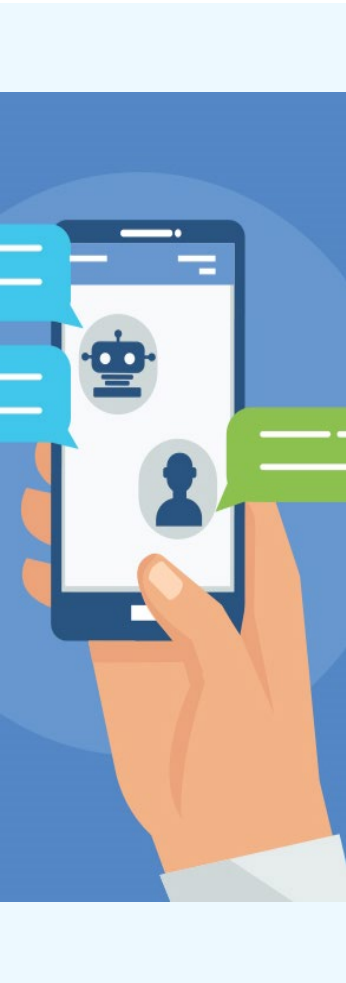
Customer chatbot

Sales

Click to return to the description of use cases

Quick win

Use case description



CHALLENGE ADDRESSED

- Complexity of product catalogs and technical specifications, making **equipment selection difficult**
- **Fragmentation of information** on availability, contract terms, and delivery options
- **Lack of personalized recommendations** tailored to specific customer needs
- **Time wasted** by staff answering repetitive questions about rental processes.

BENEFITS

- **Optimized operations** through fast, accurate responses to customer inquiries
- **Reduction of support costs** by automating routine interactions
- **Improvement of customer experience** with personalized, context-aware recommendations through a seamless, proactive service

Towards implementation

| IMPACT*           | 3,7 / 5 | ACCESSIBILITY*          | 3,7 / 5 |
|-------------------|---------|-------------------------|---------|
| Economic gain     | 3,7 / 5 | Compatibility w/ assets | 4,2 / 5 |
| Non-economic gain | 3,3 / 5 | Required investments    | 3,3 / 5 |
| Scalability       | 4,0 / 5 | Risk level              | 3,5 / 5 |

Prerequisites

- **Product** catalog, technical specs and availability info for accurate equipment matching
- **Contract** terms, penalties, insurance policies
- **Customer context**: usage intent, location, and live metrics (e.g., weather)
- Integration with **CRM and rental platforms**
- AI/Natural Language Processing models: **to interpret queries and provide context-aware answers**

DISCLAIMER: The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined

ESTIMATED MATURITY OF THE SOLUTIONS

Very limited, exploratory

Few live business cases

Multiple providers

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis

Limited

Moderate

High

3

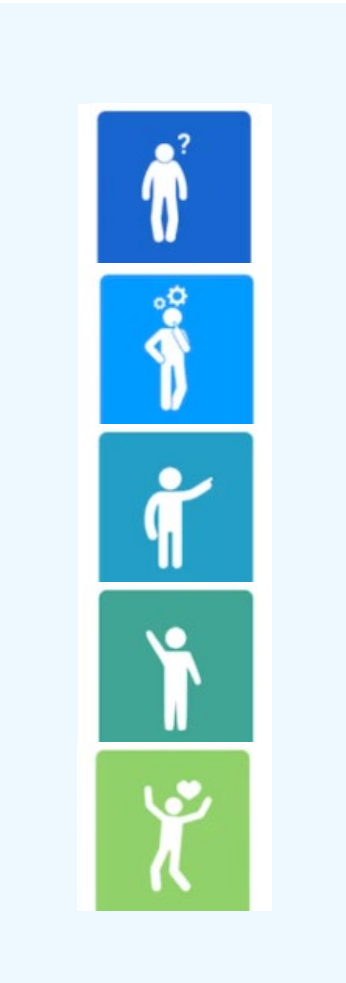
Customer visits prioritization

 Sales

 Click to return to the description of use cases

Quick win

Use case description



 **CHALLENGE ADDRESSED**

- **Difficulty in identifying which customers require urgent attention** or have high strategic value
- Inefficiency in scheduling visits without clear prioritization, leading to **missed upsell opportunities**
- **Risk of churn** due to lack of proactive engagement with declining or inactive accounts

 **BENEFITS**

- **Improved prioritization of customer visits** based on data-driven scoring
- **Maximized retention and upsell potential** through targeted scheduling
- **Optimized resource allocation** by focusing on high-value and at-risk accounts

Towards implementation

| IMPACT*           | 3,3 / 5 | ACCESSIBILITY*          | 3,5 / 5 |
|-------------------|---------|-------------------------|---------|
| Economic gain     | 3,6 / 5 | Compatibility w/ assets | 3,2 / 5 |
| Non-economic gain | 3,0 / 5 | Required investments    | 3,4 / 5 |
| Scalability       | 3,4 / 5 | Risk level              | 3,8 / 5 |

**Prerequisites**

- **Historic visit data:** frequency, outcomes, and customer profiles to identify patterns
- Integration with **CRM and sales platforms** for real-time customer and contract information
- AI/ Machine learning algorithms **to rank and prioritize customers** based on potential value and urgency

**DISCLAIMER:** The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined

**ESTIMATED MATURITY OF THE SOLUTIONS**

Very limited, exploratory

Few live business cases

Multiple providers

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis



26

Cybersecurity threat detection

IT

Click to return to the description of use cases

Use case description



CHALLENGE ADDRESSED

- **Increasing sophistication** of cyberattacks targeting rental company systems and data
- **High vulnerability** due to multiple access points across branches
- **Limited visibility into** unusual login patterns, data access, or system **anomalies**
- **Human factor risk** from phishing emails and lack of employee awareness

BENEFITS

- **Early detection of suspicious activity** to prevent data breaches and financial loss
- Automated alerts to IT/security teams for **faster incident response**
- **Improved resilience** through phishing simulations and targeted employee training
- **Regulatory compliance** by strengthening cybersecurity protocols and monitoring

Towards implementation

| IMPACT*           | 3,4 / 5 | ACCESSIBILITY*          | 3,5 / 5 |
|-------------------|---------|-------------------------|---------|
| Economic gain     | 2,3 / 5 | Compatibility w/ assets | 3,8 / 5 |
| Non-economic gain | 4,0 / 5 | Required investments    | 3,3 / 5 |
| Scalability       | 4,0 / 5 | Risk level              | 3,5 / 5 |

Prerequisites

- **System logs and access records** to track user activity and detect anomalies
- **Network traffic data and email metadata** for phishing detection and threat analysis
- **Threat patterns** and attack signatures for accurate identification
- Integration with **IT/security platforms**
- AI/ Machine learning models **to analyze behaviors and predict breaches**

DISCLAIMER: The estimation below reflects preliminary information available on tech providers' websites and needs to be further refined

ESTIMATED MATURITY OF THE SOLUTIONS

Very limited, exploratory

Few live business cases

Multiple providers

\*averaged scores provided by respondents

Sources: ERA, Corporate websites, KPMG Research & Analysis

Limited

Moderate

High



for



# Contents

01 – Introduction to AI

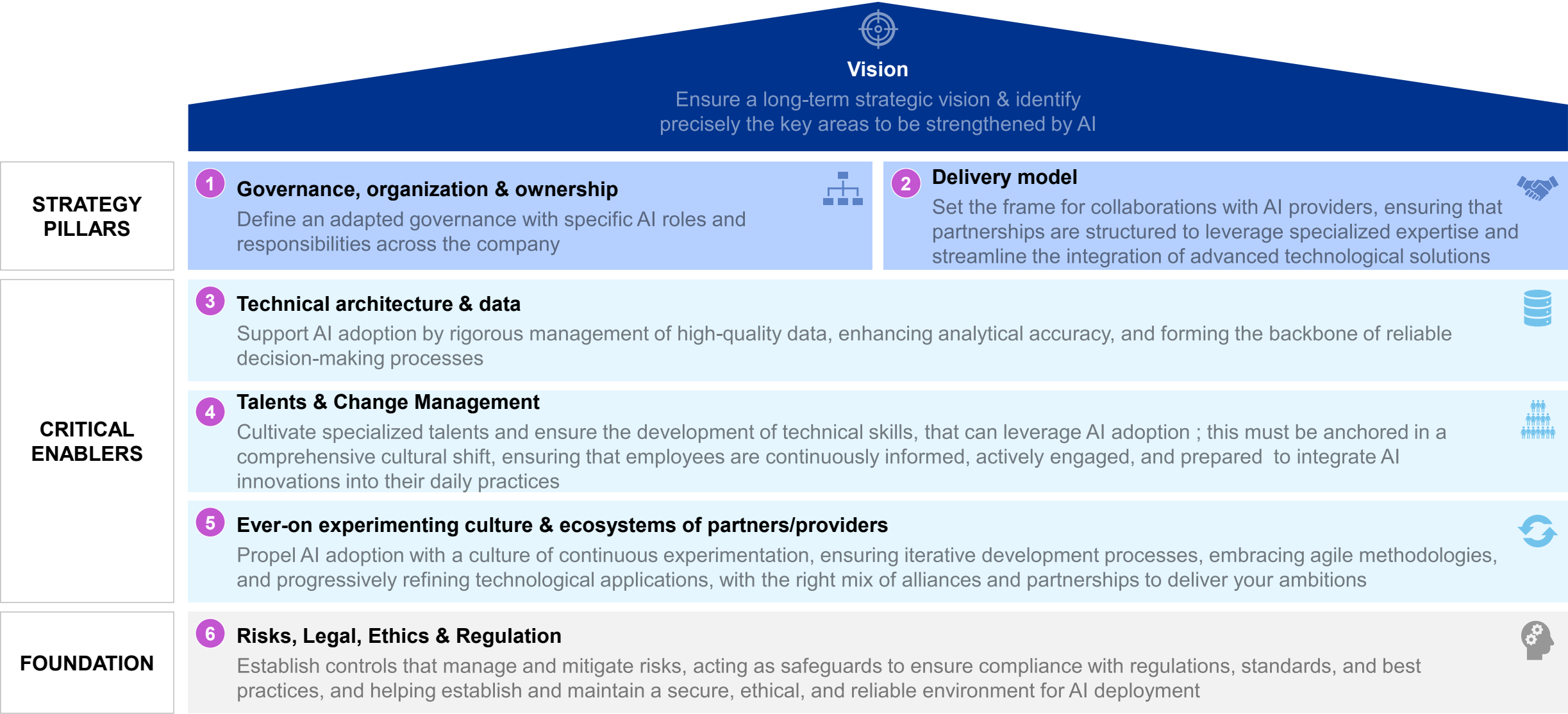
02 – Panorama of most relevant AI use cases for rental companies

03 – Preliminary top priorities for rental companies

**04 – Global AI implementation recommendations**

05 – Appendix

# Key success factors when engaging in an AI journey at scale

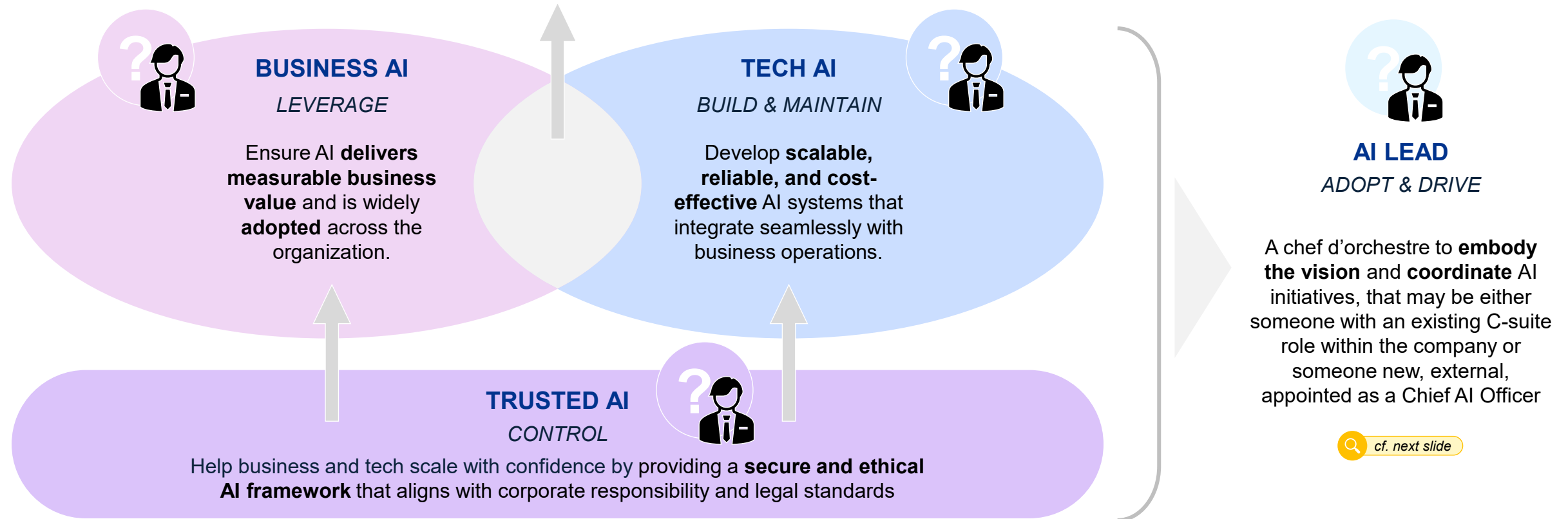


Sources: KPMG research & analysis

# As AI has both front and back-office impacts, it concerns every employee within a firm and inevitably involves ownership challenges

→ 3 key dimensions to consider when talking about AI ownership

Tech must co-evolve with business, ensuring AI is not only built but also useful, usable and effectively used



Sources: KPMG Knowledge base

# In the early stages of your journey, establish an AI Lead as the guiding force for enterprise-wide AI experimentation and scaling

Zoom AI lead

Robust leadership is a foundational enabler of any business change, and AI adoption is no different. To ensure this, we recommend establishing a dedicated role of an **AI Adoption Lead**. With the right leadership, strategic vision, and expertise, they will help ensure the journey delivers the key business outcomes, utilizes the appropriate tools, maintains regulatory compliance, and demonstrates clear benefits to stakeholders.



AI Adoption Lead

| TYPICAL RESPONSIBILITIES                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• <b>Shaping AI vision and strategy</b> to support organization’s business outcomes, catering to its strengths, challenges, and technological maturity.</li><li>• <b>Driving investment processes for AI initiatives</b>, ensuring alignment with the organization's goals.</li><li>• <b>Establishing a trusted AI framework</b> for ethical, sustainable, and responsible AI use to ensure compliance with relevant regulations and ethical guidelines.</li><li>• <b>Integrating AI into the portfolio of offerings</b>, to enhance efficiency, effectiveness, and customer experience.</li><li>• <b>Overseeing change management, upskilling and communication programs</b> to enable adoption across the enterprise.</li><li>• <b>Raising awareness about AI</b> within the organization and promoting its benefits.</li></ul> |

| SKILLS / EXPERIENCE                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• <b>Strategic thinker:</b> a voice with a vision for how AI can transform the business and go from pilots to value creation and scale for customers and employees.</li><li>• <b>Empathetic and inclusive leader:</b> demonstrates exceptional people skills and the ability to build strong relationships across the organization. This individual is a trusted leader who can effectively communicate the value of AI to diverse audiences, inspiring buy-in and mitigating various types of biases.</li><li>• <b>Visionary change agent:</b> possesses a proven track record of driving successful business transformations through innovative thinking and a deep understanding of how to leverage AI to create new value streams and optimize existing processes.</li><li>• <b>Knowledge of the AI domain:</b> a deep understanding of the technical capabilities and limitations of AI, as well as all things data.</li><li>• <b>Adept at risk management:</b> can balance the risks and opportunities from AI to monetize initiatives safely and to help progress the organization on their AI journey.</li></ul> |

Sources: KPMG Knowledge base



# Depending on context, size and AI maturity, AI Lead role may be assigned to an existing C-Suite role...

Zoom AI lead

| Chief Information Officer                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Chief Data Officer                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                | Chief Digital Officer                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Great "default" candidate to lead AI adoption, especially in the short and medium term when the volume of AI activity is still moderate. As this increases, capacity challenges may cause them to compromise on either, or both, their CIO and AI roles.</p>                                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <p>Excellent AI adoption Lead candidate for organizations with particularly challenging data landscapes and objectives. In the long term, fulfilling both CDO and AI roles may cause similar capacity challenges as described for the CIO.</p>                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                | <p>Strong contender to lead AI adoption, particularly in organizations where digital transformation and customer experience are key priorities. Their expertise positions them well to integrate AI into business processes and strategies but their focus on digital goals may limit a broader AI perspective.</p>                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Opportunities                                                                                                                                                                                                                                                                                                                                                                                                                   | Risks                                                                                                                                                                                                                                                                                                                                                                                                                                           | Opportunities                                                                                                                                                                                                                                                                                                                           | Risks                                                                                                                                                                                                                                                                                                                                                                                                                          | Opportunities                                                                                                                                                                                                                                                                                                                                                                                                                     | Risks                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <ul style="list-style-type: none"><li>• <b>Deep understanding of technology</b> - IT infrastructure, systems, and security, crucial for integrating AI seamlessly</li><li>• <b>Low change management effort:</b> Well-embedded into existing tech organization and business structures, allowing them 'to hit the ground running'</li><li>• <b>Cost-effective</b>, thanks to leveraging existing leadership resources</li></ul> | <ul style="list-style-type: none"><li>• <b>Risk of competing priorities</b> between the CIO and AI responsibilities, especially when the volume of AI adoption activity increases</li><li>• <b>Potential for technological bias</b> resulting in a focus on tech over broader business goals and AI strategy</li><li>• <b>Potentially limited AI expertise</b>, which may require additional training or external AI advisory support</li></ul> | <ul style="list-style-type: none"><li>• <b>Deep understanding of data</b>, and of the critical role it plays in AI success</li><li>• <b>Analytics expertise</b> allowing to better leverage data to measure AI impact and demonstrate ROI</li><li>• <b>Cost-effective</b>, thanks to leveraging existing leadership resources</li></ul> | <ul style="list-style-type: none"><li>• <b>Risk of competing priorities</b> between the CDO and AI responsibilities, especially when the volume of AI adoption activity increases</li><li>• <b>Data-centric bias</b>, which may overshadow broader AI strategy and its business application</li><li>• <b>Potentially limited AI expertise</b>, which may require additional training or external AI advisory support</li></ul> | <ul style="list-style-type: none"><li>• <b>Deep understanding of digital transformation</b>, including customer experience and business process optimization</li><li>• <b>Expertise in leveraging AI for digital innovation</b>, enhancing the adoption of AI-powered tools and services</li><li>• <b>Ability to act as a bridge</b> between technology, data, and business units, ensuring seamless integration of AI.</li></ul> | <ul style="list-style-type: none"><li>• <b>Risk of conflicting priorities</b> between digital transformation goals and AI-specific initiatives, especially as AI expands</li><li>• <b>Focus on digital strategies</b> may result in less emphasis on AI applications beyond digital innovation</li><li>• <b>Limited technical expertise</b> in AI may require additional support from specialized teams or external advisors</li></ul> |

Sources: KPMG Knowledge base

# ... or warrant a dedicated resource, a new AI Lead role

Zoom AI lead

Chief AI Officer

**Most challenging option** due to the requirement to redefine the boundaries within and beyond the C-Suite. This may be justifiable for organizations with particularly ambitious AI objectives, a higher level of AI maturity, or an increased need to balance individual functions' competing AI agendas.

- Opportunities
- Risks
- Introduces an impartial perspective on AI to balance function-focused agendas of other CxO with a broader, enterprise level point of view
  - Deep AI expertise enabling better prioritization of AI initiatives and management of adoption requirements
  - Dedicated capacity, ensuring AI initiatives receive the necessary support
- Risk of organizational disruption due to the consequent restructuring and adjustments to existing leadership dynamics
  - Costly, due to the requirement to fund a new C-level position
  - Potentially extended onboarding timelines due to required seniority and rare skillset (unless staffed with an existing in-house resource)

| Comparison between potential candidates to be AI Lead      |                                                                                     |                                                                    |                                                                    |                                                                    |                                                                    |
|------------------------------------------------------------|-------------------------------------------------------------------------------------|--------------------------------------------------------------------|--------------------------------------------------------------------|--------------------------------------------------------------------|--------------------------------------------------------------------|
| Key skills                                                 |  | C Information O                                                    | C Data O                                                           | C Digital O                                                        | Chief AI Officer                                                   |
| Organizational change effort                               |                                                                                     | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> |
| Capacity for AI initiatives                                |                                                                                     | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> |
| Cost effectiveness                                         |                                                                                     | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> |
| Technology expertise                                       |                                                                                     | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> |
| Data expertise                                             |                                                                                     | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> |
| Speed of onboarding                                        |                                                                                     | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> | <div><div></div><div></div><div></div><div></div><div></div></div> |
| These positions might be grouped based on the company size |                                                                                     |                                                                    |                                                                    |                                                                    |                                                                    |

- Best practices
- Regardless of who takes on the role of AI Adoption Lead, there are several common best practices that should be followed to ensure successful AI implementation and scaling across the enterprise.

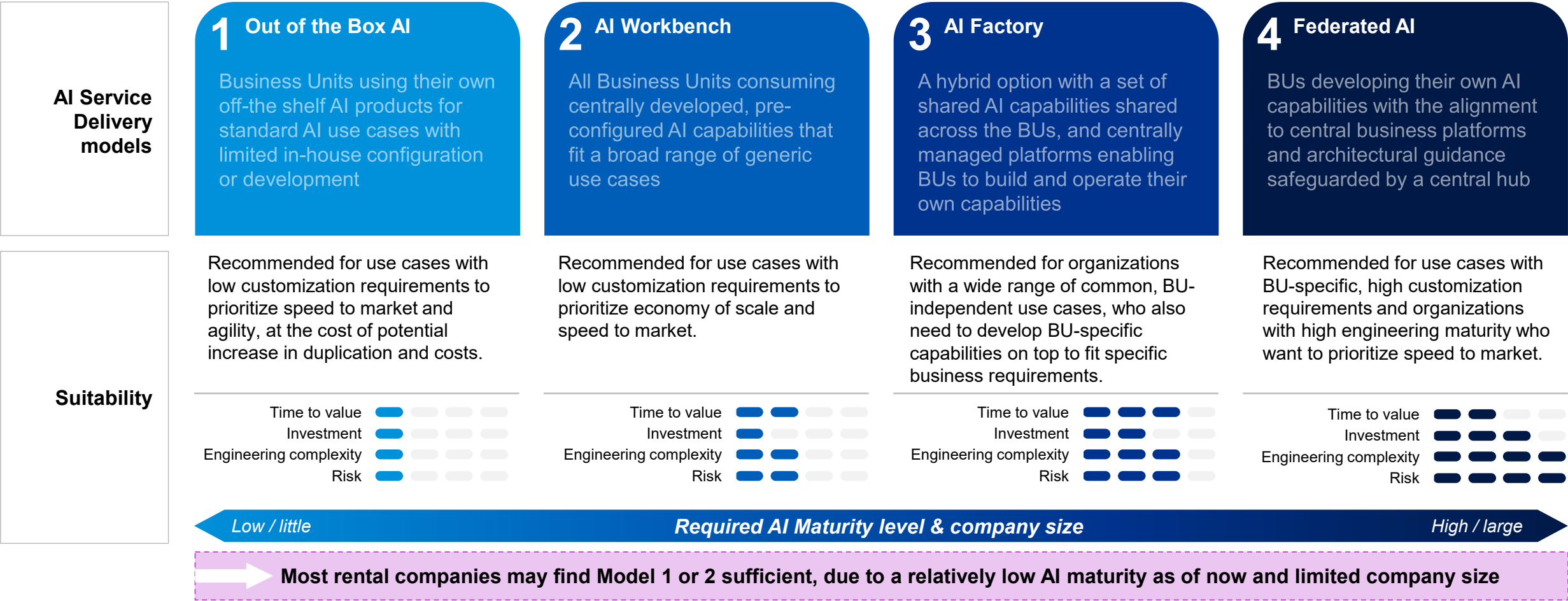
  - Establish or redefine key roles:** establish an AI Adoption Lead role, upskill and retrain employees, ensuring they are fit to support the immediate and future AI adoption requirements
  - Develop or recruit specialized AI skills:** cultivate necessary roles and skills within your existing workforce and consider bringing in external talent where needed.
  - Drive cultural change:** build awareness and understanding of AI, address common fears, and highlight the benefits for employees and the organization.
  - Embody a bridge between front and back teams:** facilitate communication and collaboration to ensure a seamless work towards common AI goals.

Sources: KPMG Knowledge base

# 4 key AI delivery models exist to integrate AI effectively into one’s company: the best solution depending on one’s size, AI maturity, and strategic goals

Zoom service delivery model

Each organization may choose to adopt **one**, a **selection**, or **all patterns concurrently**, or **even move between them** depending on their requirements, size and AI maturity.

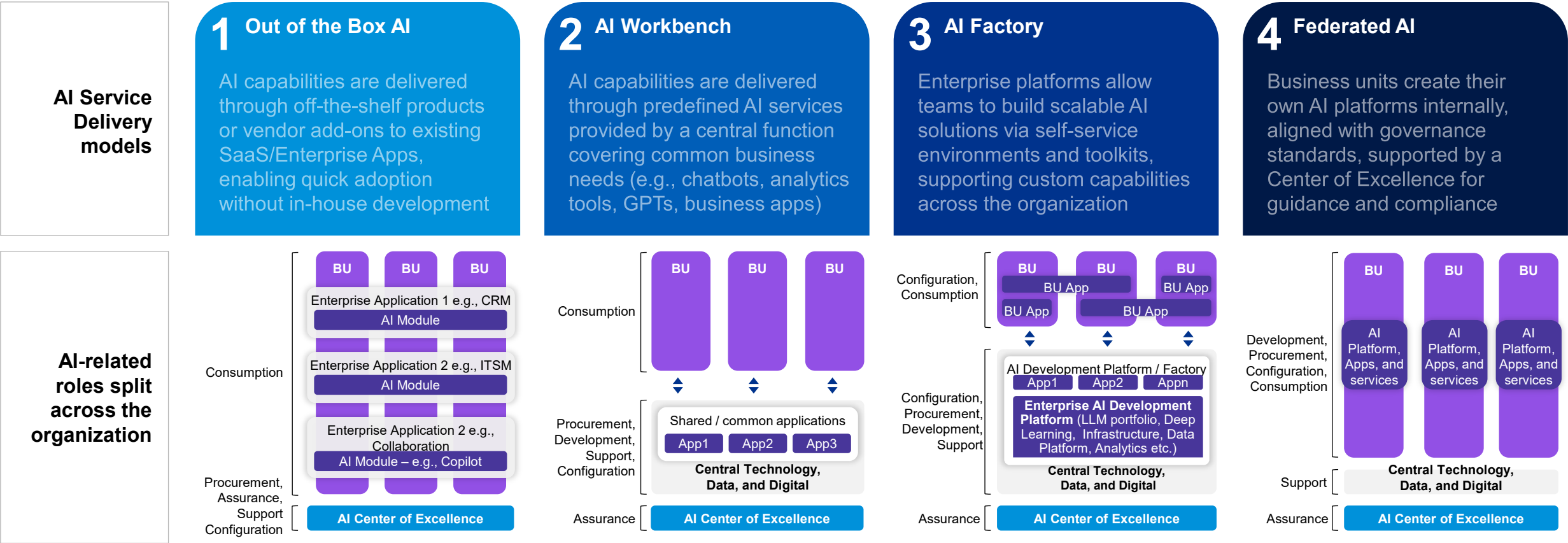


Sources: KPMG Knowledge base

# Each AI delivery model comes with a different split of AI-related responsibilities across the organization

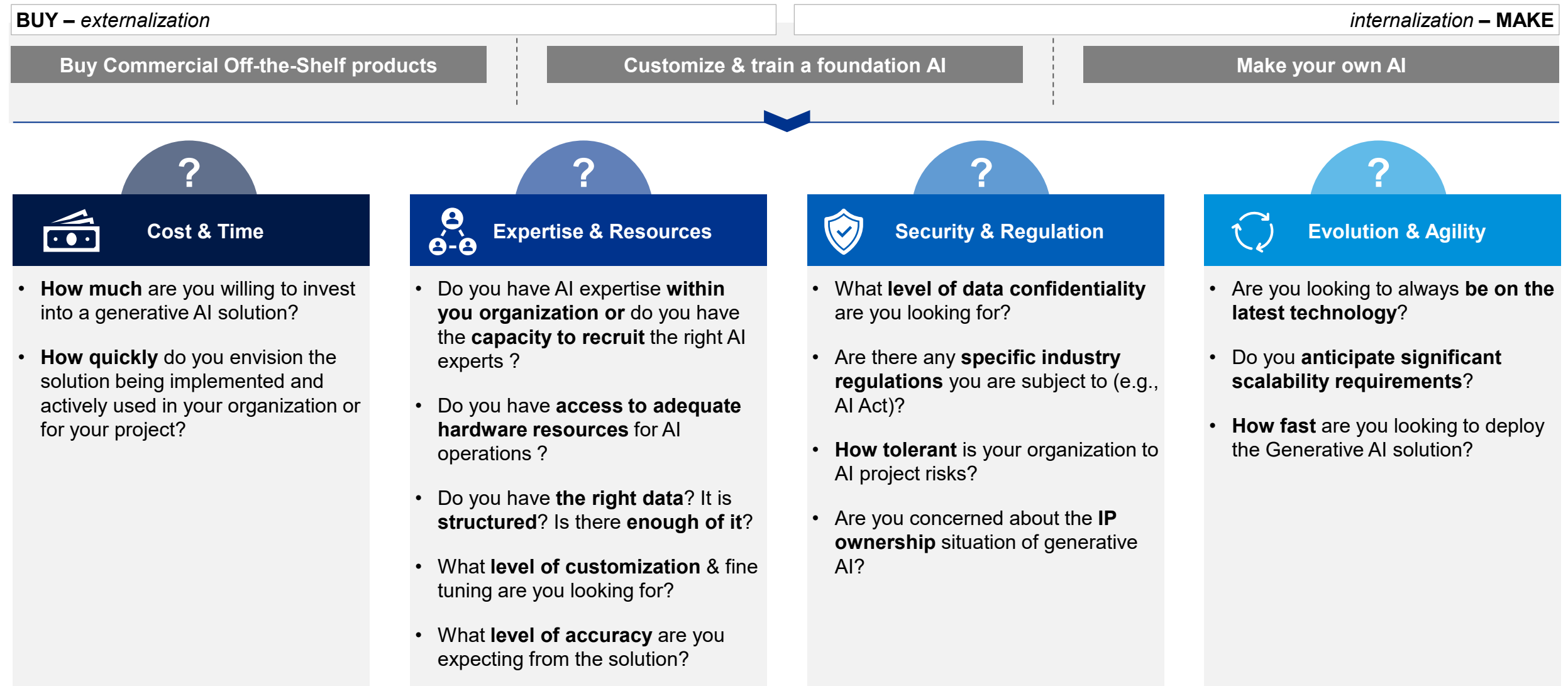
Zoom service delivery model

We recommend caution and diligence when choosing the right model, as it will drive **significant changes in the distribution of AI funding, headcount, and decision rights**



Sources: KPMG Knowledge base

# The choice of the right AI development scenario can be guided by answering a few questions relative to the core objective and main constraints



Sources: KPMG Research & Analysis

# Assessing investments to develop external AI solutions implies anticipating build and run costs, relative to AI pricing models

Key pricing models of external AI solutions

|        | Model            | Description                                                                     | Example                                                                                          | Key benefit                                                                                                             | Key constraint                                                                                                        |
|--------|------------------|---------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Access | User/<br>License | Fixed cost charged per user or per license                                      |  grammarly    |  Easy to predict cost                |  Costly when scaled up             |
|        | Token            | Fixed cost charged per token (i.e., unit of text) processed                     | OpenAI                                                                                           |  Fair cost with pay-per-use          |  Large potential overcost          |
| Usage  | Prompt           | Fixed cost charged per query or task submitted                                  |  cohere       |  Good for discrete tasks             |  Requires prompting skills         |
|        | Service          | Fixed cost charged per service (e.g., API call or compute time)                 |  Midjourney   |  Flexible for advanced users         |  Large potential overcost          |
| Result | Output           | Fixed cost charged per unit of output delivered (e.g., image)                   |  DALL·E     |  Cost aligned with deliverable     |  Requires prompting skills       |
|        | Value            | Fixed cost charged per business value delivered (e.g., time saved, solved case) |  chargeflow |  Cost aligned with business impact |  Hard to measure delivered value |

➡ Please note that due to overall low maturity of their solutions, rental-specific tech providers offer on-demand custom made pricing packages, therefore they were not fitting the above categories

Comments

| Hybrid                                                                                     |                                                                                                        |
|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| Access & usage-based                                                                       | Packages                                                                                               |
| Fixed subscription cost combined with variable usage-based                                 | Fixed subscription cost per predefined bundles (e.g., Basic, Pro, Enterprise) with increasing features |
|  jasper |  Microsoft          |

Key insights

- The most relevant pricing model **varies** depending on a company's needs and usage
- These needs and usage patterns **may evolve over time** and require a reassessment of the chosen option

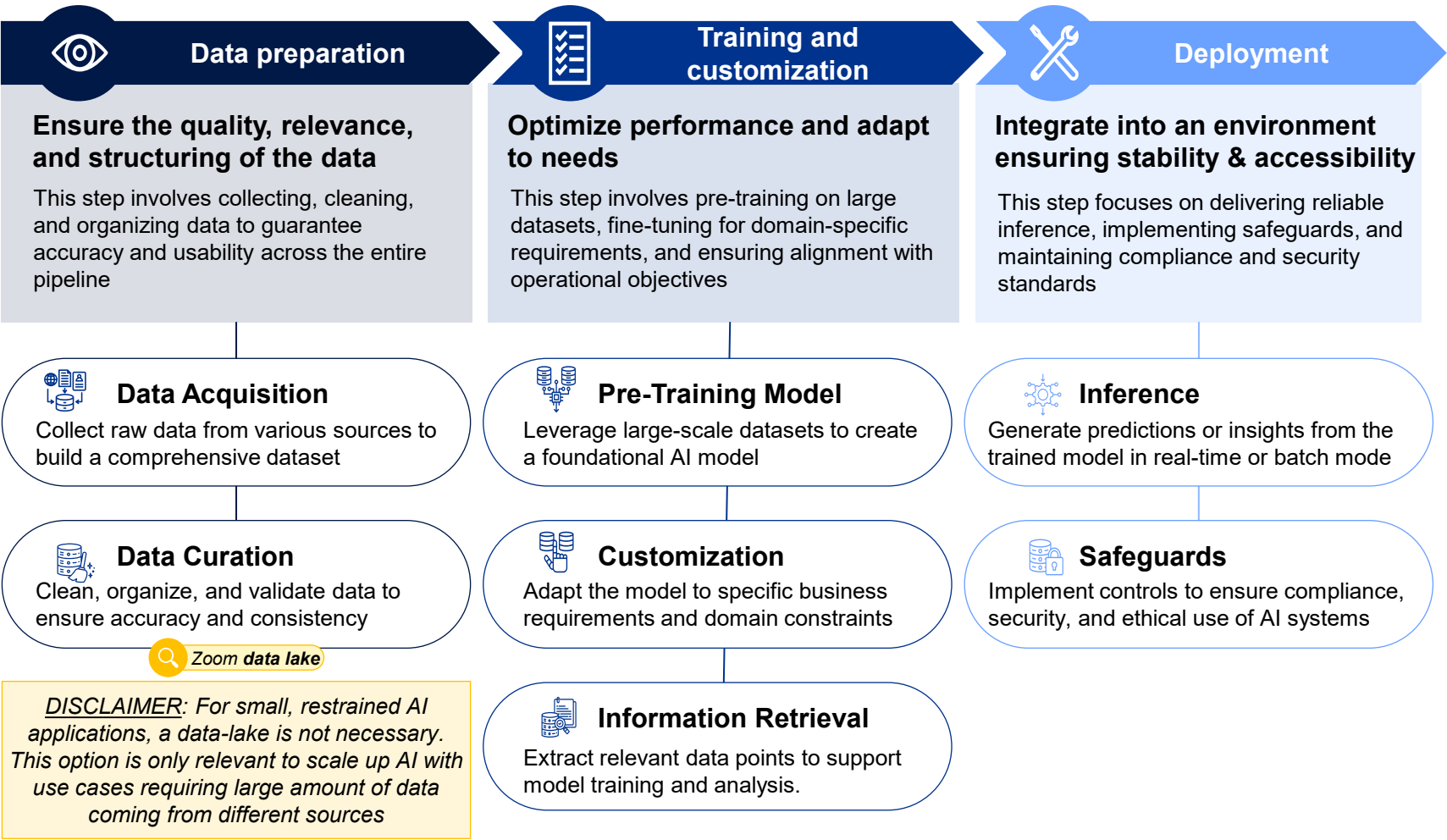
Sources: Corporate websites, KPMG Research & Analysis

 Highly limiting     Moderately impactful     Highly beneficial



# A first must-have step towards AI implementation is having the right actionable data

Macro-illustration of data flow from extraction to exploitation



Comments

- Data can be a strategic enabler, however...
- ... some **simple AI applications do not require extensive data rework** and can be activated directly
  - ... **ensuring data quality is challenging but key**. Companies need to **define clear business objectives from the start**, a/o embark on an iterative journey with a test & learn methodology
  - ... depending on amounts of data, preparing data may represent a **costly amount of work** ; especially for large rental companies with IT legacy and multiple **non-harmonized systems**

Sources: ERA, KPMG Knowledge base

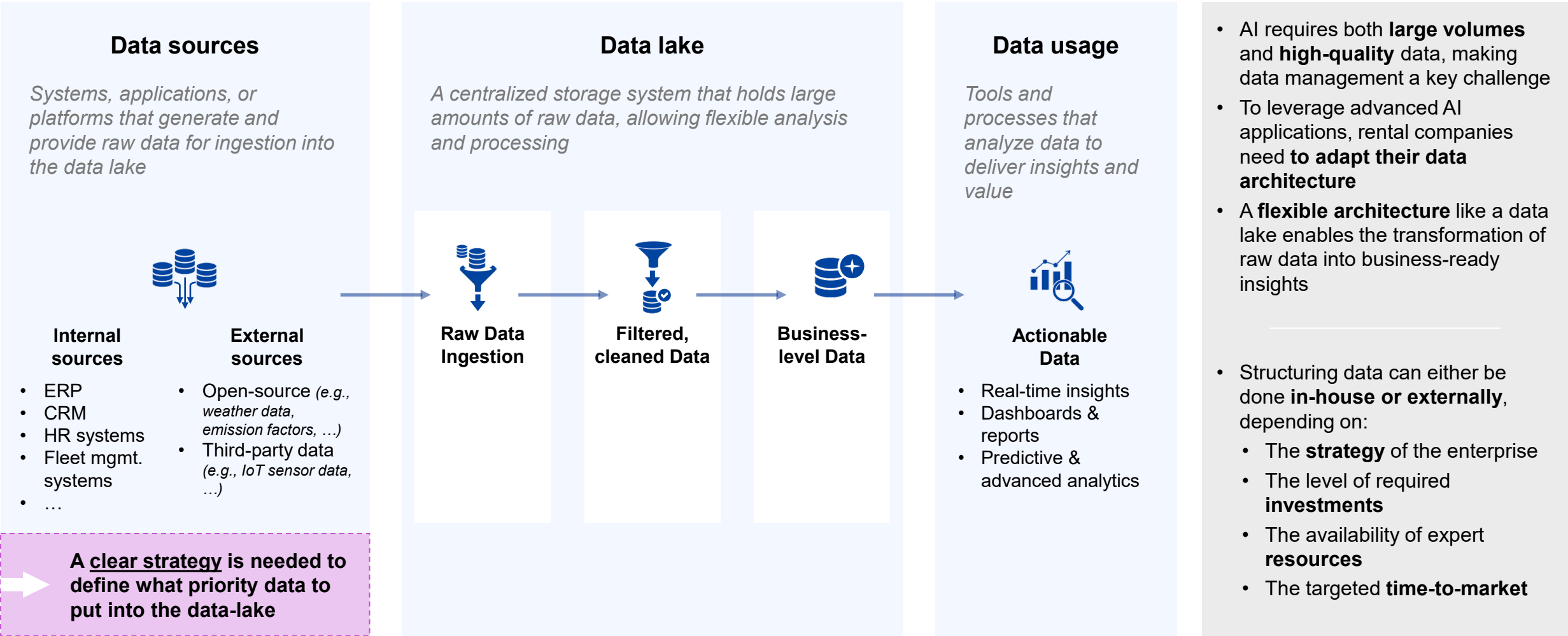
# Ensuring the right data architecture with data-lakes: the cornerstone to scale up AI with use cases requiring large amount of data coming from different sources

Zoom data lake

Macro illustration of data refinement from sources to usage

ILLUSTRATIVE

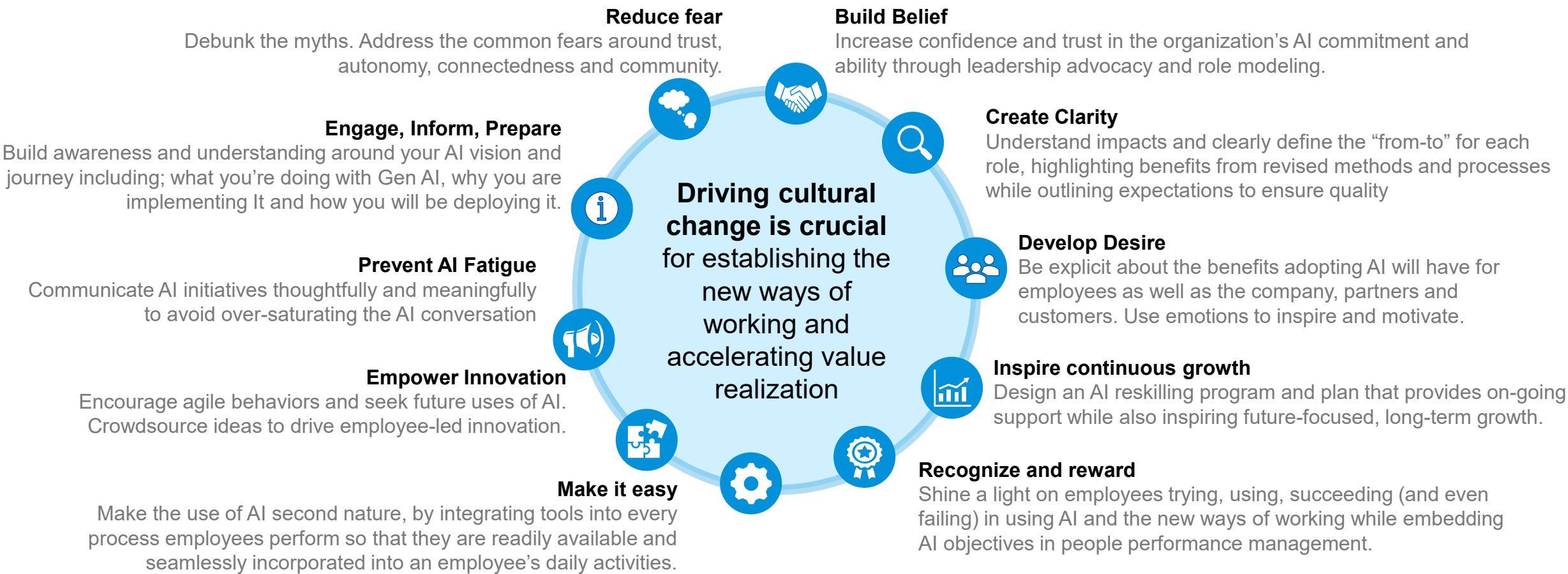
Comments



# Whatever the chosen model, foster a future-ready culture that prioritizes people. If not the case, change management will be key

80% about people  
20% about technology

Changing the DNA organization is about changing the culture first. Driving cultural change is important for **establishing the new ways of working** and **accelerating value realization**.

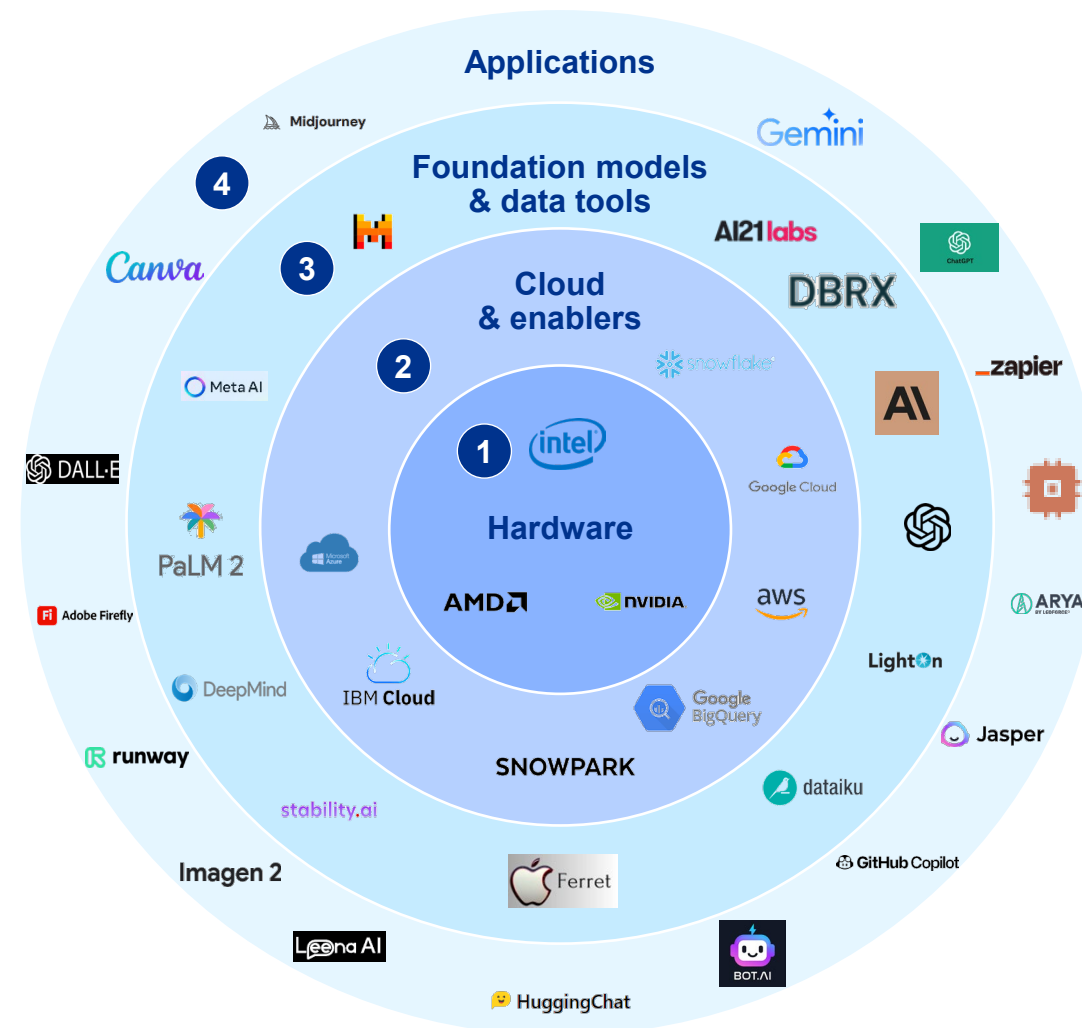


Sources: KPMG Knowledge base

# The selection of key partners to implement AI solutions must come with a clear understanding of their positioning on the value chain

## Macro illustration of the AI value chain

ILLUSTRATIVE



## Key evolutions of the AI value chain

### 1 2 Existing layers, reinforced by AI

- **Hardware**  
Optimized accelerator chips (GPU/TPU) for training and running models
- **Cloud and enablers**  
Management of AI models to facilitate access to computing power and optimize costs (plus new technologies)

### 3 4 New links in the value chain related to AI

- **Pre-trained models / foundation models**  
Used to generate specific types of content and perform tasks, based on large volumes of data. These models can be proprietary or open source.
- **APP / BOT**  
B2B and B2C products that leverage the value chain for specific use cases, adding functionalities or content (e.g., RAG)

Sources: KPMG Research & Analysis

# For core business AI use cases, rental companies can leverage specialized tech providers and draw inspiration from success stories...

ILLUSTRATIVE

## Improve customer experience

KALOUTOU

Sales



### Simplified customer access to fleet information

"With ShareMat, our customers have access at all times to their rental fleet, as well as regulatory and technical documents for the time of rental."  
Transformation Director



Ops



### Optimized delivery with smart routes

"With Webfleet's HGV routing, we can set much more accurate routes avoiding low bridges, weight restrictions and narrow lanes." General Manager, Transport & Logistics



Ops



### Optimized delivery with smart routes

"In the past, we needed one working day for to plan our routes. Today, we do it in either one hour for simple routes or two hours for more complex routes." ARMO GmbH

## Gain efficiency through automation



Finance



### Streamlined transactional and customer order management

"Ainscough Crane Hire has grown its revenue significantly [...] This has been enabled by a deep understanding of the end-to-end transactional and customer order data." IT & Transformation director



Finance



### Streamlined transactional and customer order management

"[From] Word documents and a basic online booking form [to] a more efficient way to invoice, quote, email, and take payment from clients" Founder



Maintenance



### Streamlined equipment inspection

"They create a quick inspection right there on the spot and it's automatically stored and catalogued. They've obviously embraced it because it makes their job that much easier." Director of Product support

## Enhance insights for strategic decision-making



Fleet mgnt



### Centralized multi-brand equipment data

"Before Hiboo, we had to struggle with multiple platforms to gather partial information, which made any strategic use extremely complex." Key account manager



Fleet mgnt



### Enhanced equipment data for further utilization insights

"We use [Trackunit] today to make sure we're not only operating the machines very effectively, but also looking into the future to address the ESG." VP of Digital Product Management



Sales



### Enhanced visibility on operations and schedules

"Quipli has saved [Flagstaff Equipment] a lot of time, easily decreasing the time we are on the phone with customers by about half." Rental Manager

Sources: Corporate websites, KPMG Research &amp; Analysis



# ... learning from rental companies who already implemented AI use cases to drive operational and business performance, with in-house or external solutions

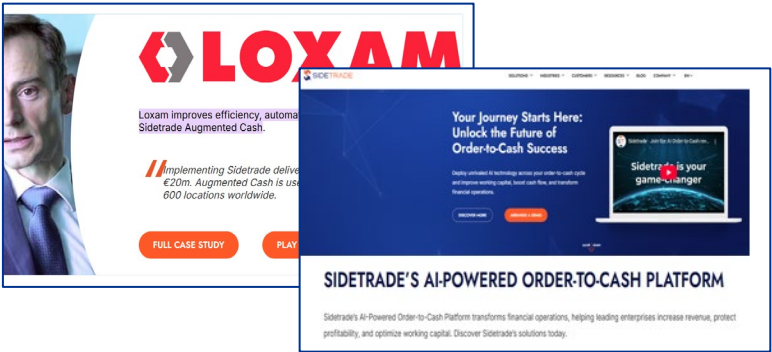
## Examples of AI solutions actioned by Rental Companies

### AI for finance and customer service



Loxam uses **Sidetrade’s AI-powered Augmented Cash platform** to **predict payment behavior**, **automate follow-ups**, and improve **cash collection**

This led to a reduction in **Days Sales Outstanding (DSO)**, freeing up nearly **€20 million**

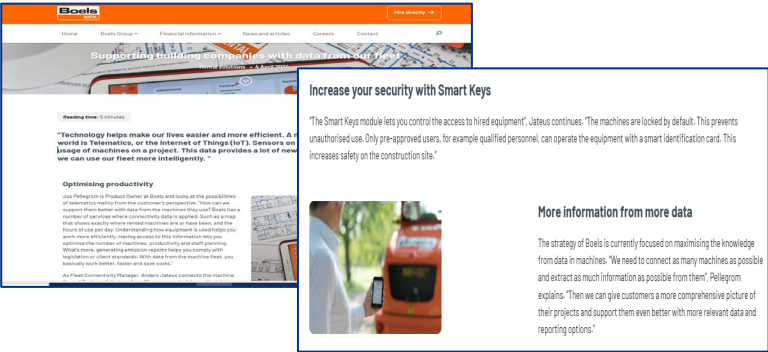


### AI for predictive maintenance and fleet management



Boels improves **decision-making** and **operational efficiency** by using **telematics data** from its fleet, collected via ZTR, to **monitor equipment usage, health, and location**

Although still evolving, the system supports future improvements such as **proactive servicing** and **downtime reduction**

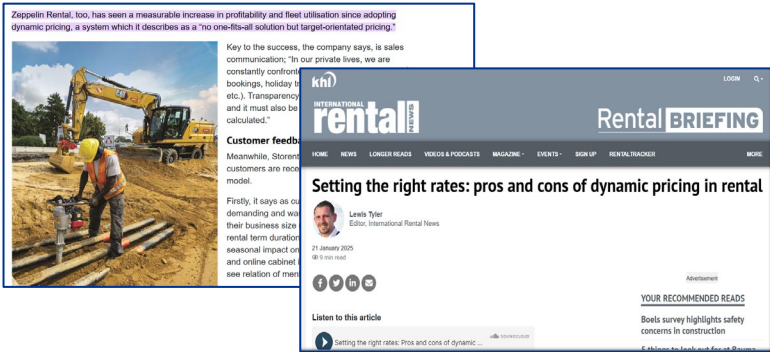


### AI for dynamic pricing



Zeppelin Rental has implemented an **AI-assisted dynamic pricing** algorithm to **maximize profitability and fleet utilization**. The system adjusts rental rates in real time based on **demand, utilization, seasonality, and location**

This approach helps **reduce idle time** and **increase revenue per asset**



Sources: Corporate websites, KHL, Research & KPMG analysis



# For non-rental specific use cases, a wide variety of tech providers exists (1/6)

Finance

Overview of finance-oriented AI solution providers

NON-EXHAUSTIVE

| Category                         | Illustrative examples of tech providers*                                                        |                                                                                                  |                                                                                                                |                                                                                             |
|----------------------------------|-------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| Financial Closing                |  BLACKLINE     |  highradius   |  Numeric                    |                                                                                             |
| Budgeting                        |  cube          |  datarails    |  Anaplan                    |  planful |
| Billing                          |  ramp          |  Brex         |  coupa navi                 |                                                                                             |
| Audit & Insurance                |  datasnipper |  MindBridge  |  Validis                   |                                                                                             |
| Regulatory, TAX & ESG Compliance |  Avalara     |  workiva    |  blue dot                 |                                                                                             |
| Business Insights                |  StackAI     |  AlphaSense |  Power BI<br>by Microsoft |                                                                                             |

Illustrative success story

 Numeric

×

 posit

Key challenge

Time-consuming month close and error risk

AI solution

Real-time integration and AI-powered flux analysis

Outcome

Financial closing went from 7 to 2.5 days

Key insights\*

- AI leaders use 3x more AI in finance than other organizations — creating a **major performance gap**
- AI is especially implemented in **financial planning** and **accounting** with the highest rates of wide adoption (10% vs 3% for tax operations)

Sources: Corporate websites, 2025 KPMG global AI in finance study, KPMG Research & Analysis | \*Please note certain providers may cover multiple categories. Current positioning reflect their most important field of application

# For non-rental specific use cases, a wide variety of tech providers exists (2/6)

HR

Overview of HR-oriented AI solution providers

NON-EXHAUSTIVE

| Category               | Illustrative examples of tech providers*                                                         |                                                                                                   |                                                                                                    |                                                                                             |
|------------------------|--------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| Talent acquisition     |  fetcher        |  HiredScore     | TALENTERIA                                                                                         |                                                                                             |
| Onboarding             |  Coursebox      |  Talentech      |  Microsoft Mesh |  HEYTEAM |
| Learning & development |  lingio         |  SC training   |  Dextego        |  zavvy   |
| Talent analytics       |  visier        |  seekout       |  NEOBRAIN      |                                                                                             |
| Performance management |  Peoplebox.ai |  effy         |                                                                                                    |                                                                                             |
| Career management      |  gloat        |  eightfold.ai |                                                                                                    |                                                                                             |

Illustrative success story

 × 

Key challenge

Unoptimized internal talent management

AI solution

Talent intelligence bridging skills and operational needs

Outcome

"Employees now see opportunity for growth in the company."  
VP of People and Culture, CCEP

Key insights\*

- HR-oriented solutions have strong **potential for efficiency gains**
- Their **adoption is limited** by **compliance-related risk** (e.g., sensitive personal data use, **bias and unfairness**) due to the lack of human qualities (e.g., emotional intelligence) affecting candidates or employees

Sources: \*AIHR (Academy to innovate HR), Corporate websites, KPMG Research & Analysis | \*Please note certain providers may cover multiple categories. Current positioning reflect their most important field of application

# For non-rental specific use cases, a wide variety of tech providers exists (3/6)

## Overview of IT-oriented AI solution providers

NON-EXHAUSTIVE

| Category                           | Illustrative examples of tech providers*                                                               |                                                                                                 |                                                                                                     |                                                                                                 |
|------------------------------------|--------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| Code generation                    |  GitHub Copilot       |  replit      |  tabnine         |                                                                                                 |
| Code testing & fixing              |  qodo                 |  CodeRabbit   |  CodeMate.ai     |  Claude Code |
| Documentation & code understanding |  mintlify             |  Scribe      |                                                                                                     |                                                                                                 |
| Collaboration & workflow           |  CodeStory by GitHub |  Bugasura    |  What The Diff |                                                                                                 |
| Low/ No-code development           |  appian             |  outsystems |  quickbase     |                                                                                                 |
| Cybersecurity                      |  HOXHUNT            |  knowbe4    |  Gophish       |                                                                                                 |

## Illustrative success story

 CodeRabbit

×

 VISMA

Key challenge

Hard-to-navigate codebase (decades-old, massive, error-filled)

AI solution

Smart bug detection to enhance code quality and streamline reviews

Outcome

90%+ of bugs detected, 50% shorter reviews  
4x faster integration in master

## Key insights

- AI tools for developers are **mature solutions**, **widely adopted** at company-level
- In a study conducted with Accenture, GitHub revealed a **successful adoption rate** of their AI solution (96%), and average **intensive usage** among developers (5 days per week)

Sources: Corporate websites, KPMG Research & Analysis | \*Please note certain providers may cover multiple categories. Current positioning reflect their most important field of application

# For non-rental specific use cases, a wide variety of tech providers exists (4/6)

Marketing

Overview of marketing-oriented AI solution providers

NON-EXHAUSTIVE

| Category                                   | Illustrative examples of tech providers*                                                             |                                                                                                    |                                                                                                 |                                                                                               |
|--------------------------------------------|------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
| Content & SEO                              |  SURFER             |  frase          |  Koala       |  jasper    |
| Visual & Video creation                    |  Canva              |  Midjourney     |  synthesia   |  descript  |
| Ad performance                             |  BlendAI            |  adΣxt          |  AdRoll      |                                                                                               |
| Customer engagement & behavioural analysis |  INTERCOM          |  zendesk       |  Optimizely |  crazyegg |
| Email marketing automation                 |  INTUIT mailchimp |  klaviyo      |                                                                                                 |                                                                                               |
| Marketing intelligence reporting           |  whatagraph       |  Supermetrics |  Looker    |                                                                                               |

Illustrative success story

 × 

|                                                                     |                                                                          |
|---------------------------------------------------------------------|--------------------------------------------------------------------------|
| <b>Key challenge</b>                                                | <b>AI solution</b>                                                       |
| Low brand visibility and recognition of the service trustworthiness | Scaled content creation: industry-specific, with SEO-boosted performance |
| <b>Outcome</b>                                                      | increased web traffic with scaled qualitative content                    |

Key insights\*

- About **75% of marketers consider AI either very or critically important** to the success of their marketing
- **ChatGPT is still the undisputed leader** of AI tools, but its popularity declines as companies get bigger

Sources: \*2025 State of marketing AI report by Marketing AI Institute, Corporate websites, KPMG Research & Analysis | \*Please note certain providers may cover multiple categories. Current positioning reflect their most important field of application

# For non-rental specific use cases, a wide variety of tech providers exists (5/6)

Legal

## Overview of legal-oriented AI solution providers

NON-EXHAUSTIVE

| Category                           | Illustrative examples of tech providers*                                                        |                                                                                                     |                                                                                                  |                                                                                              |
|------------------------------------|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| Contract drafting                  |  Spellbook     | GENIE AI                                                                                            |  Robin        |           |
| Contract review                    |  ThoughtRiver™ |  LITERA Kira      |  Luminance    |                                                                                              |
| Litigation & claims handling       |  Briefpoint    |  Everlaw          |  DISCO        |                                                                                              |
| Compliance & regulatory monitoring |  KLARITY      |                                                                                                     | ContractPodAi                                                                                    |                                                                                              |
| Legal research                     |  CoCounsel   |  Thomson Reuters |  Lexis+ AI® | Harvey                                                                                       |
| Contract lifecycle management      |  docusign.   |  LINKSQUARES    |  Ironclad   |  sirion |

## Illustrative success story

 Luminance

×

 Avianca

Key challenge

Time consuming contract reviews

AI solution

Seamless review of the full data set and insights

Outcome

From a month to a 3-hour review of all contracts

## Key insights

- Although AI solutions **allow for automation and efficiency gain**, their effective use might depend on the level of **seniority**
- AI adoption is also limited by a potential **low appetite for change** as the legal sector is typically slow to adopt new technology

Sources: Corporate websites, KPMG Research & Analysis | \*Please note certain providers may cover multiple categories. Current positioning reflect their most important field of application

# For non-rental specific use cases, a wide variety of tech providers exists (6/6)

Strategy

Overview of strategy-oriented AI solution providers

NON-EXHAUSTIVE

| Category                                 | Illustrative examples of tech providers*                                                                                                                                                                                                                                                                                                                                                                       |  |  |  |
|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|
| Competitive intelligence                 |  CRAYON  Browse AI                                                                                                                                                                                                                          |  |  |  |
| Consumer intelligence & trends detection |  GLIMPSE  Brandwatch                                                                                                                                                                                                                       |  |  |  |
| Gen-AI market research                   |  Quinn by quantilope  GWI Spark  qualtrics <sup>XM</sup>  perplexity |  |  |  |
| Interviews & survey automation           |  SEMBLY <sup>AI</sup>  Speak  Poll the People  SurveyMonkey  |  |  |  |
| Voice of customer                        |  Cloutrack  Medallia  SurveySparrow  canvs                   |  |  |  |
| Revenue intelligence                     |  GONG                                                                                                                                                                                                                                                                                                                       |  |  |  |

Illustrative success story

Key challenge

Democratizing fast access to expert-level insights

AI solution

AI-powered market research assistant

Outcome

Quick access to strategic insights to launch targeted marketing action

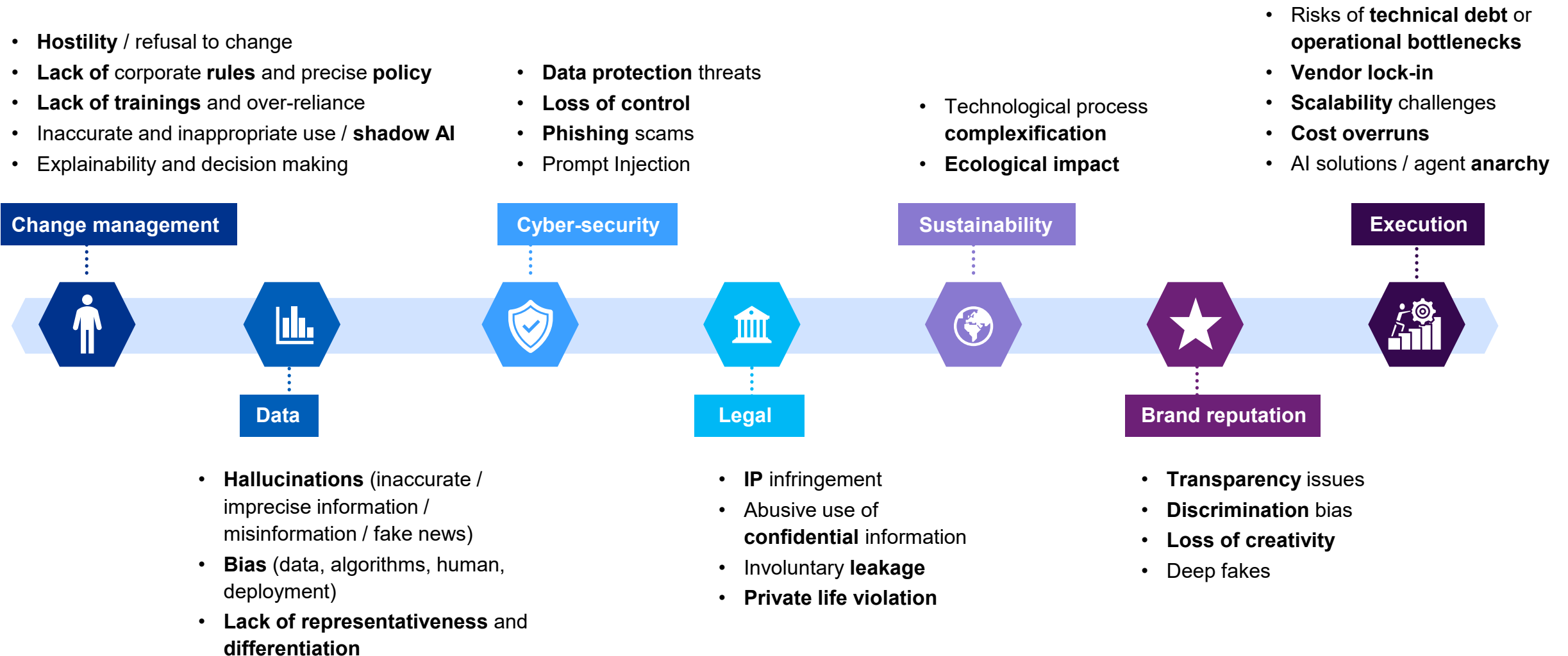
Key insights\*

- Although AI solutions **democratize insights**, their effective use might depend on the level of **seniority**
- They might be too generic; **not be able to separate signal from noise** or to own **executive-level synthesis**

Sources: Corporate websites, KPMG Research & Analysis | \*Please note certain providers may cover multiple categories. Current positioning reflect their most important field of application



# AI implementation and use at scale come with numerous risks to be mitigated and anticipated to ensure compliance with regulations and best practices



Sources: KPMG Knowledge base

# To regulate AI and safeguard users, international organizations – particularly the EU – have established several legal frameworks



→ The **European AI Act** is considered the **most far-reaching regulation of AI worldwide**, with a rights-driven approach, whereas US are following a market-driven approach and China a state-driven one

Sources: EU AI Act, KPMG research & analysis

# The EU AI Act is a risk-based approach, to ensure AI systems utilized within the EU or affecting EU citizens are trustworthy, legally compliant, and ethical



Zoom AI Act



## DEFINITION

The EU AI Act is a proposed regulation that aims to **ensure AI systems** utilized within the EU or affecting EU citizens **are trustworthy, legally compliant, technically robust, and ethically sound**.

The regulation adopts a **risk-based approach** that requires operators to assess and document potential risks posed by AI systems to comply with existing EU laws, rights, and values to prevent harm to its citizens.



## KEY OBJECTIVES

1

**Correct abuses and regulate usage**, with strict requirements and **penalties** for the riskiest systems

2

**Prohibit AI systems that present unacceptable risks** to fundamental rights

3

**Ensure secure and transparent AI systems** to provide a stable legal framework for investment and innovation



## REACH

The AI Act obliges **providers, authorized representatives, importers and users** of AI systems. Yet, the impact of the obligations varies

The AI Act has **extra-territorial reach**. Thus, it applies to:

- **All providers**, who introduce an AI system into the EU market or make it available for use in the EU market
- **All users:**
  - **Located within the EU**, regardless of where the system originates
  - **Based outside of the EU**, if their AI system is used or has an output within the EU market



**Maximum fine of 15M€ or 3% of global turnover, whichever is higher, for users of AI system trust passing the EU AI Act**

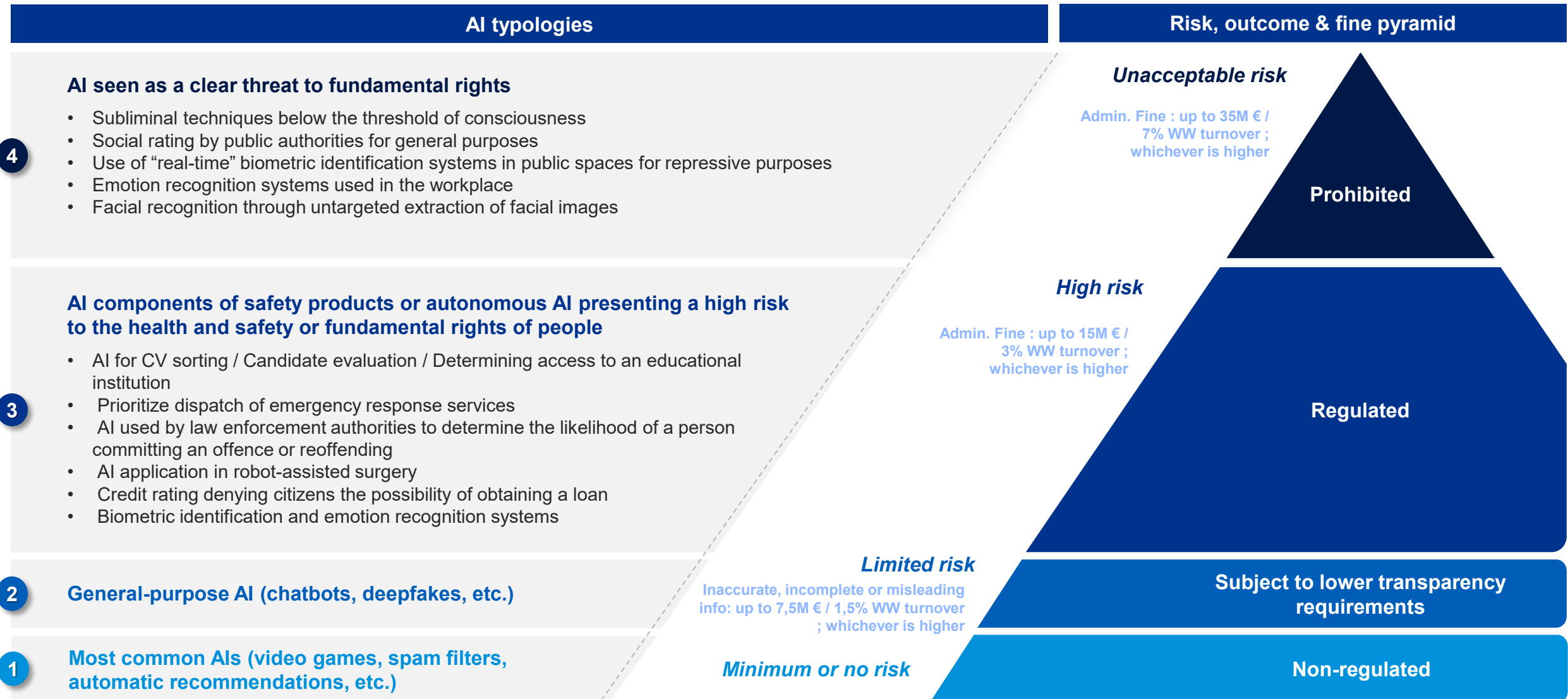
Sources: EU AI Act, KPMG research & analysis



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# This approach classifies risk levels and sets obligations for both AI providers and AI using companies

Zoom AI Act



Sources: EU AI Act, KPMG research &amp; analysis

# Within your organization, you may define an AI clause/charter to clarify rights, obligations, responsibilities, risks, and potential sanctions if any



This clause / charter should be:

1. **Wide enough** to encapsulate all upcoming AI usage and **potential risks**
2. **Reassuring about the technical and legal safeguards** AI deployment will face

1

## Clarify the definition and purpose of AI

Within the company and how and why it is used

2

## Display ethical commitments of the company regarding AI use

Particularly in terms of transparency and fairness

3

## Define the rights, obligations and responsibilities

of employees concerning the use of AI in a professional context

### EXAMPLE

- **Data Protection:** Define rules to prevent disclosure of confidential or personal data, ensuring GDPR compliance and respect for privacy
- **Responsible Use:** Require verification of AI-generated content before sharing and promote critical, informed evaluation of AI tools

4

## Anticipate and prevent the specific risks

associated with these emerging technologies (leakage, copyright, bias, discrimination... )

### EXAMPLE

- **Intellectual property rights:** raise awareness of the risks of copyright infringement and define best practices for respecting intellectual property rights

5

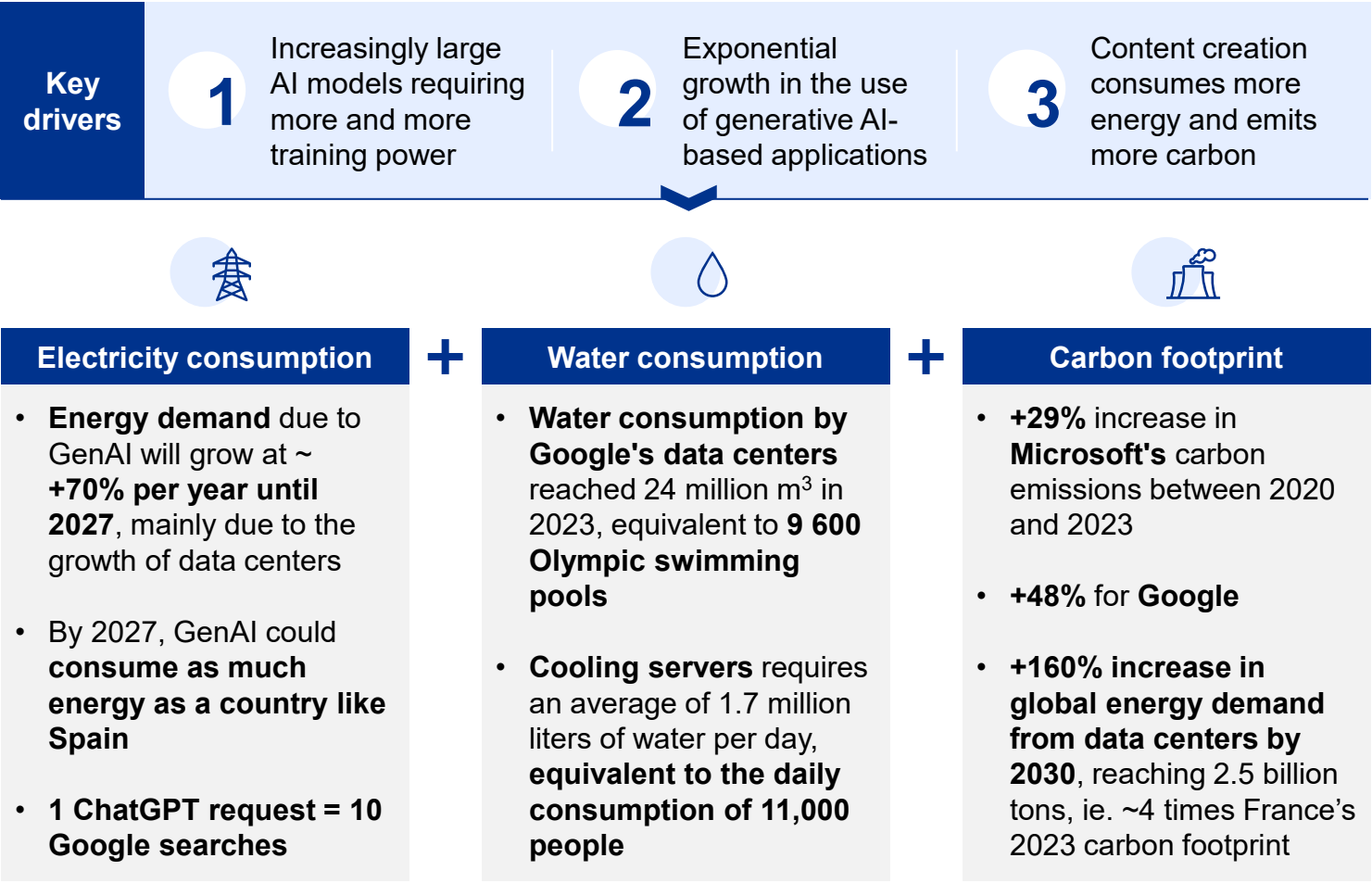
## Define potential sanction measures

in the event of non-compliance with the defined rules

Sources: KPMG research & analysis

# The rise of AI is far from carbon neutral and 2030 global energy demand from data centers is expected to equal ~4 times France’s 2023 annual carbon footprint

## AI usage is more and more energy consuming





# The remedies? A sensible and even deliberately targeted use of AI to improve air quality and energy consumption

## A few recommendations to lower AI’s environmental impact...

Conception

Design more energy-efficient data centers

Leverage **Corporate Power Purchase Agreements (CPPA)\***, **green hydrogen**, **waste heat**, **underwater data centers**, etc. to reinforce data center energy sustainability

Prioritize less energy-intensive AI models

**Limit the use** of deep learning, **minimize** algorithm and neural network **training**, and **implement a policy** for archiving, expiring, and deleting data

Utilization

Using AI with restraint

Encourage AI use that asks “Do I really need this?” before launching new projects

Raise awareness and train users

**Educate and equip consumers and end users** so that they understand their environmental impact when using AI

## ... or to use it to support sustainable practices

ILLUSTRATIVE



Improve air quality

- Forecasting and anticipating increases in air pollution
- Simulation of various air quality scenarios based on data such as traffic patterns, industrial activities, and weather conditions
- IQAir Initiative (UN): the project uses AI to analyze data from 25,000 stations and provide air quality forecasts and anticipate pollution peaks



Reduce energy consumption

- Real-time data processing: AI analyzes sensor readings to detect anomalies and excessive consumption
- Learning consumption habits: models are trained on historical data to predict energy needs
- The Energiency project enables manufacturers to identify potential energy savings. The goal is to achieve up to 15% energy savings in one year.

Sources: KPMG research & analysis | \* long-term contracts with renewable energy producers, enabling data centers to secure energy supplies and meet legal obligations regarding renewable energy



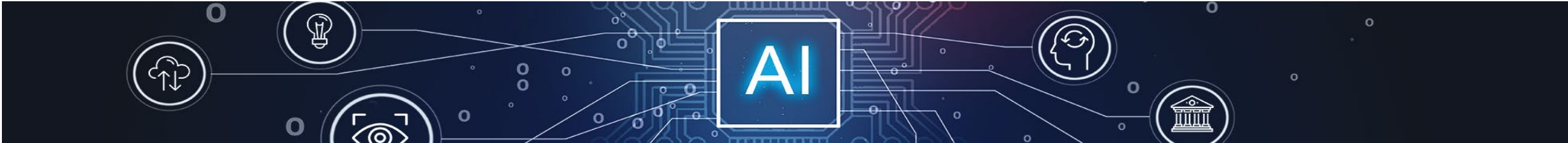
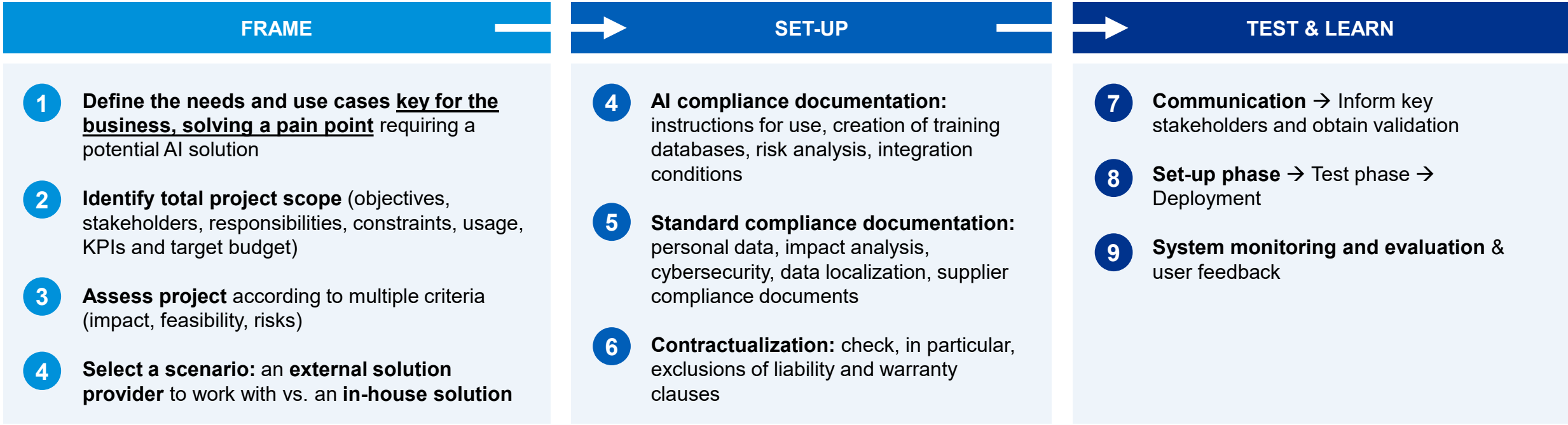
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72

# To put it in a nutshell, a 9-step recommendation for cross-functional AI project mode and use case implementation



The recommendation below is to adapt according to the context of each rental company  
Please note project speed may vary



Sources: KPMG Knowledge base



for



# Contents

01 – Introduction to AI

02 – Panorama of most relevant AI use cases for rental companies

03 – Preliminary top priorities for rental companies

04 – Global AI implementation recommendations

**05 – Appendix**

# The identification of relevant AI use cases and their assessment was enriched by responses from rental companies to the online survey

## Key survey features

| Objective                                                                                                                                          | Respondents                                                                                                                   |
|----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|
|  To collect preliminary insights from ERA members on AI use cases |  With 17 respondents from rental companies |

## Comments

### Approach to survey answer

- Respondents were given a leaflet for online survey, gathering:
  - a selection of 40 AI use cases, organized by business functions
  - a prioritization methodology, detailing scoring criteria and guiding the assessment process

### Respondents profile

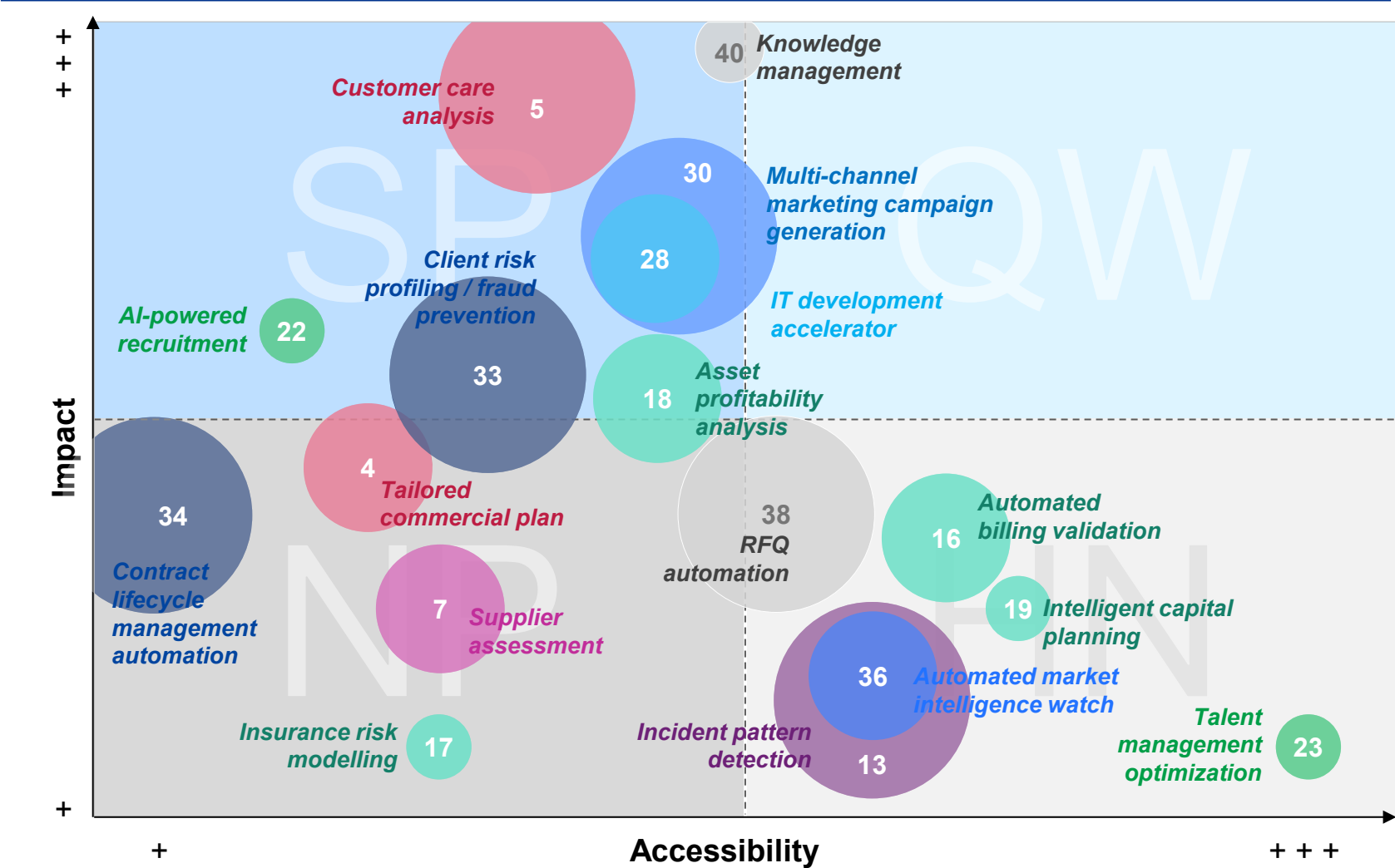
- Respondents have varied AI maturity, with equally distributed levels - a third being either enthusiastic, confirmed or expert
- Companies have overall a rather low AI maturity, with 64% considered as experimenting or having a limited AI adoption

| Questions asked |                                                                                                                                                                         |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1               | How would you describe your <b>personal familiarity with AI topics</b> ? Please select an option, from 1: AI-enthusiastic to 5: AI expert                               |
| 2               | How would you describe your <b>company maturity on AI topics</b> ? Please select an option, from 1:AI-enthusiastic to 5: AI expert                                      |
| 3               | <b>Select</b> among the 40 <b>AI use cases</b> a maximum of 12 that resonate with you or your company                                                                   |
| 4               | For each selected AI use case, please <b>assess</b> the following use case, <b>by scoring the impact/accessibility criteria</b>                                         |
| 5               | Is there <b>any other use case(s)</b> not included in the list that is implemented in your company?                                                                     |
| 6               | Is there <b>any other use case(s)</b> not implemented in your company that you don't see in the list and think would be particularly relevant for the rental industry ? |

Sources: ERA, KPMG Research & Analysis

# Use cases around fraud prevention, client risk profiling, customer care analysis, multi-channel marketing campaigns and incident pattern detection also emerged

Prioritization matrix of less selected use cases (selected 1 to 3 times)



Sources: ERA, KPMG Research & Analysis



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## Comments

- Few impactful use cases**
- 7 strategic use cases** (6 of which are related to support functions)
- Top picks** (selected 3 times) are:
  - 5 Customer care analysis
  - 30 Multi-channel marketing campaign
  - 33 Client risk profiling / Fraud prevention
  - 34 Contract lifecycle management
  - 38 RFQ automation

SP

Strategic Plays

QW

Quick Wins

NP

Non-Priority

HN

Hold for Now

Core business functions

Sales & AS (2)

Fleet management (1)

Maintenance (1)

Transversal (2)

Support functions

Finance (4)

HR (3)

IT (1)

Marketing (1)

Strategy (1)

Legal (2)

Number of respondents

# Example of a complete risk impact analysis matrix when implementing an AI chatbot for HR

Most AI-related risks can be mitigated with proper human supervision

| CAUSES   |                                                                                                        | IMPACTS   |       |              |             |                |          |               | PROBABILITY            | REMEDIES                                                                                                                                     |
|----------|--------------------------------------------------------------------------------------------------------|-----------|-------|--------------|-------------|----------------|----------|---------------|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Families | Examples & ideas                                                                                       | Financial | Legal | Reputational | Operational | Organisational | Societal | Environmental | Occurrence probability |                                                                                                                                              |
| HUMAN    | Dehumanization of processes : reduced human interaction and loss of the personal aspect of recruitment | 1         | 1     | 4            | 4           | 1              | 1        | 1             | 2                      | Integrate the possibility of making appointments with the HR department despite the presence of the chatbot, reassuring users                |
| DATA     | Data confidentiality : risks of data leakage, ethical and legal issues                                 | 3         | 4     | 3            | 1           | 1              | 1        | 1             | 3                      | Reinforce data security measures. Ensure compliance with regulations such as the GDPR. Make teams aware of the importance of confidentiality |
| MODEL    | Risk of hallucination or generation of harmful content                                                 | 1         | 4     | 3            | 3           | 1              | 1        | 1             | 2                      | Add a prevention step , automated and/or human control loop                                                                                  |
|          | Risk of sub-optimal solution, which serves as a simple search engine on a work chart                   | 2         | 1     | 1            | 1           | 1              | 1        | 3             | 3                      | Ensure that employee queries go beyond the most frequently asked questions, implement an upstream FAQ                                        |

Scale from 1 to 4, 1 being low risk and 4 the highest

Sources: KPMG Knowledge base



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for

