



REDEFINING CONVENIENCE,
TOGETHER.

THE ROAD AHEAD

Innovating in an Era of Unprecedented
Complexity and Change

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THE ROAD AHEAD...

➤➤➤➤ Context and Current Challenges

➤➤➤➤ Unlocking Growth & Productivity with Flexible Retail Technology

➤➤➤➤ Emerging Use Cases

➤➤➤➤ What's Next



Our Products



**Passport
POS**



**Engage
Media**



**FlexPay
Terminals**



**Transact
Payment**



**Forecourt
Automation**



**Fuel
Management**



**The Hub
(Asset Management)**



**iNFX
(Retail Operating System)**



+80k

Point-of-Sale
install base

50+

Countries

~350

Global
Customers

1800+

Employees

~20%

of rev. invested
in R&D

~200k

Devices
Managed

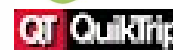
~3M

Loyalty/Payment
Subscribers

800+

Engineers

Select Customers





Our Products



Fuel Dispensers



ATG



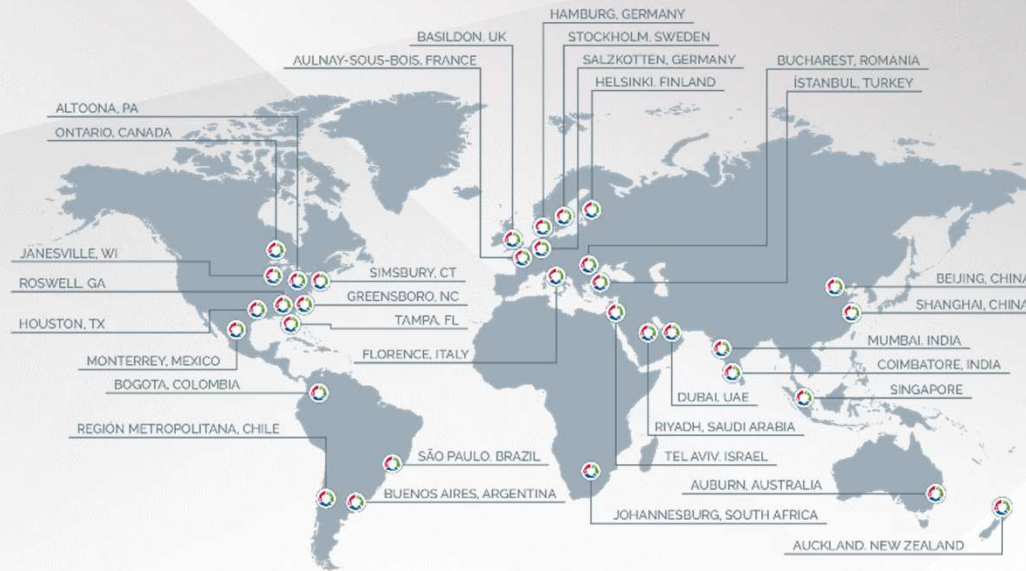
STP



EV



Spare Parts



Highlights

>1M

Devices
Globally

#1

Global
Provider

5,000+

Employees

>260k

Sites
Managed

\$2B

Revenue

600+

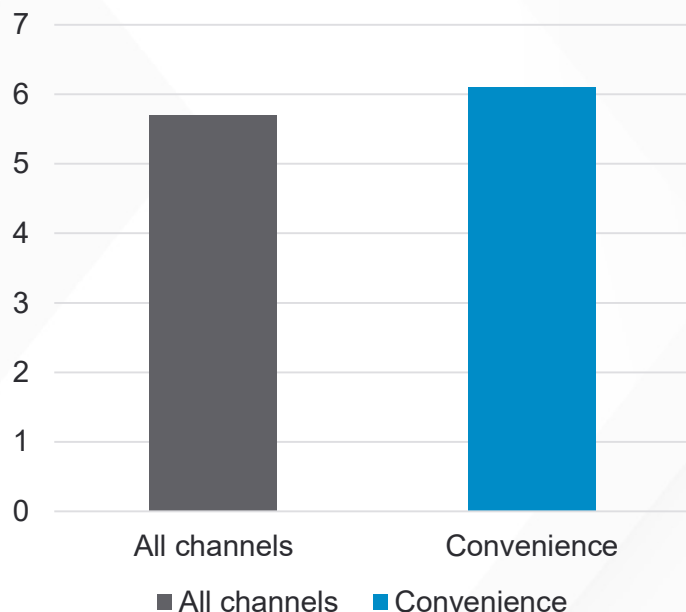
Engineers

Select Customers



CONVENIENCE RETAIL SECTOR GROWTH

FMCG Sales Volume
YoY Growth, %¹



FMCG Sales in Convenience
YoY Growth, %²

Country	Growth, %
France	10.5
Spain	8.9
Portugal	7.9
Netherlands	7.9
Italy	6.1
Austria	5.1
UKI	3.6

11% Convenience store sales growth outpacing growth of all channels¹

35% Full-service stations (with a convenience store) in Europe

366% Increase in electric vehicle sales since 2018³

47% Passenger car registrations were alternatively fueled⁴

6% Increase in labor costs⁵

- 1) Nielsen NACS European Convenience Tracker
- 2) NACS Global Convenience Store Industry Report, 2023
- 3) Statista Mobility Market Outlook
- 4) Fuels Europe Statistical Report, 2023
- 5) McKinsey, State of Grocery Europe 2024

There is significant headroom for growth via different consumer-focused innovations

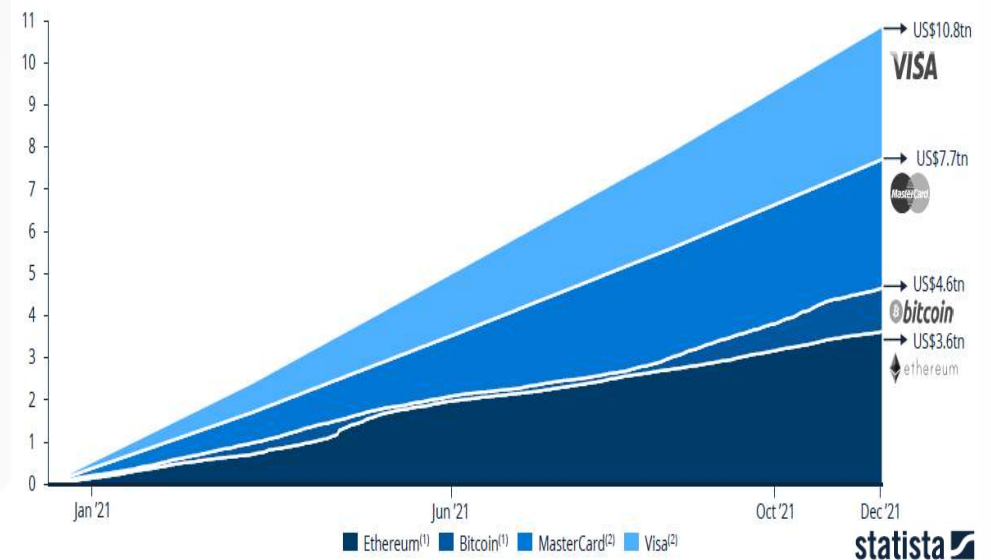
PREPARING FOR AN UNKNOWN PAYMENT FUTURE

Payment Trends

- EMV / P2P Encryption
- Mobile Apps
- Contactless / Wearables
- QR Code
- ANPR
- Connected Car
- Closed loop/fidelity schemes
- Crypto/digital currencies
- Open Banking – PSD directive

Digital Currency on The Rise

Total transaction volume for 2021 in US\$ trillion



*European Central Bank discussing issuance of digital euro

PREPARING FOR AN UNKNOWN FUELING FUTURE

E-mobility Grows

- Changing consumers behavior
- Increasing government regulations

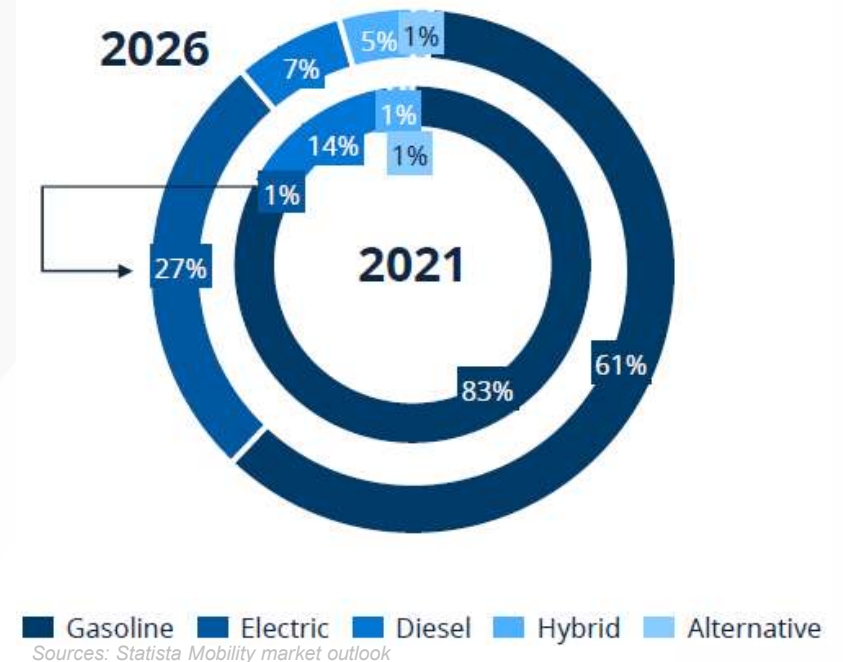
Alternative Fuels On The Rise

- Hydrogen
- Compressed Natural Gas
- Synthetic fuels

Implications

- No clear winner, forecourt equipped for them all.
- Service station real estates to be redesigned.
- Plan to continue “owning the customer” and not to leave utilities to steal them.

Fuel or drive-type share on new passenger cars in 2021 and 2026



INDUSTRY IS AT ITS WATERSHED MOMENT



Payments & Compliance

- EMV
- Cybersecurity
- Certification regimes / cumbersome new feature rollout
- **New payment modes**
- Maintenance of tech. footprint



Technology Changes

- **E-Mobility**
- **Multi-fuel future**
- Remote management via cloud
- AI-led analytics
- Hyper targeting
- Personalization
- Mobile
- Healthy
- Frictionless
- Delivery / order-ahead / curbside pickup / convenience



Consumer Expectations / Behaviors



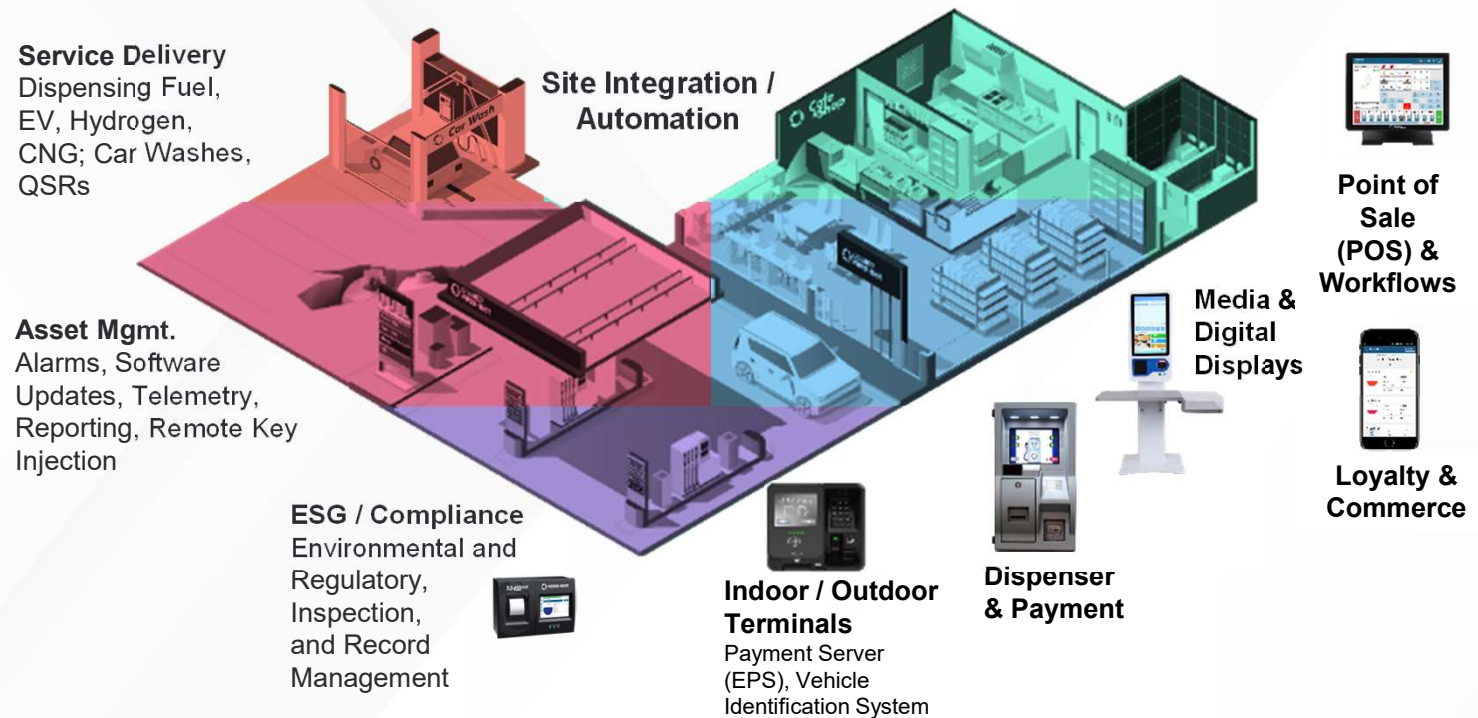
Scarcity of Labor

- Gig economy stealing workforce
- Increased cost of labor
- Manning the store 24/7
- Maintenance of equipment

CURRENT PROBLEMS ARE ADDRESSED WITH POINT SOLUTIONS...

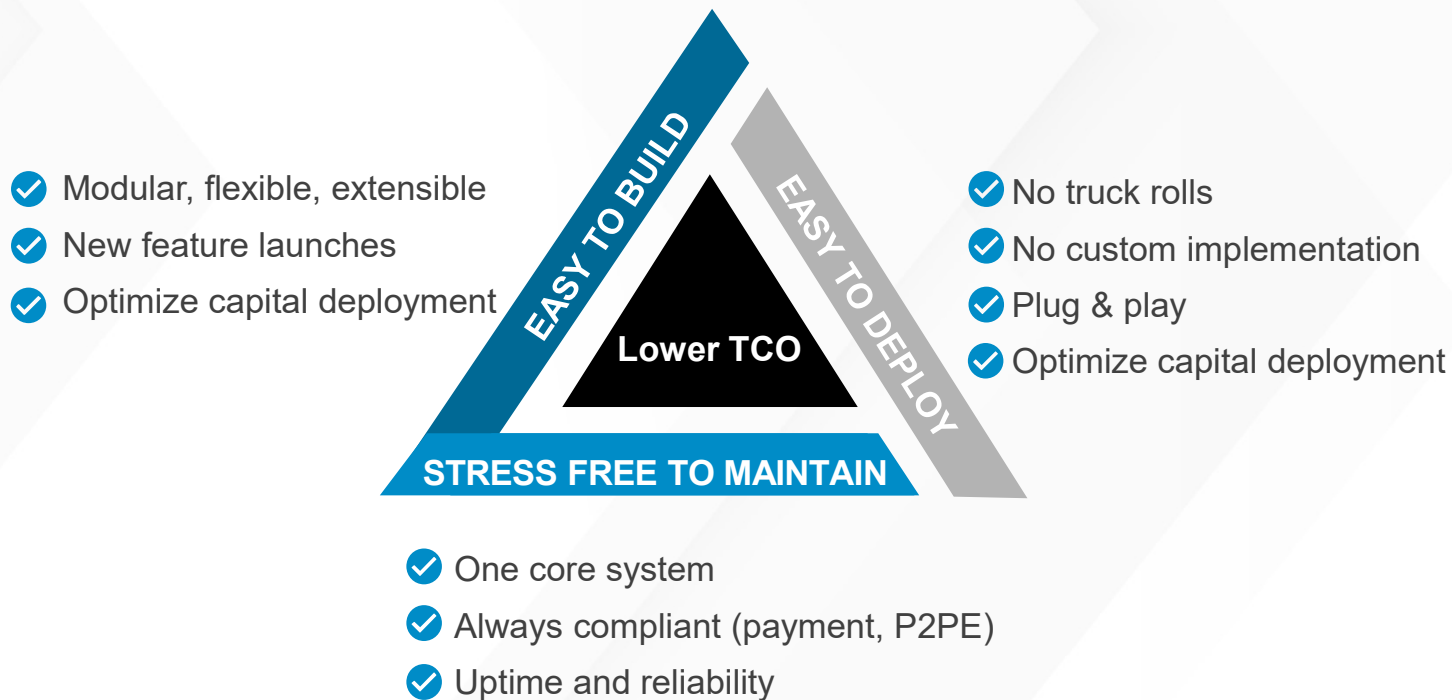
RETAILER OPPORTUNITIES

- Increase Revenue Yield
- Increase Uptime
- Always on Productivity
- Reduce Complexity



...resulting in inflexible and expensive 'monolithic islands' and cumbersome to create new consumer experiences

BENEFITS OF FLEXIBLE RETAIL



20% - 50%
Better TCO¹

50% - 75%
Certification Time

Monthly
Releases -
Faster time to Market

1. Total Cost of Ownership will vary based on services selected and overall customer spend
at 20% TCO benefit: reduction in # of truck rolls and support costs
at 50%: incr. upside from rapid feature launches and certification reductions in addition to cost savings

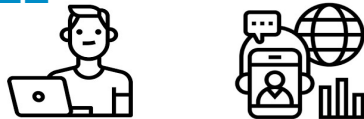
IMPLICATIONS FOR RETAILERS

BUSINESS



- Gradual evolution from points of sale to multi-service hubs with heavy retail focus.
- Customer retention and intimacy is key despite differentiation of the portfolio.
- Managing the transition.

PEOPLE



- New business models and the generic digitalization of the information require a generalized development of skills.
- Being customer/consumer centric requires development of soft skills too.

- Support the **widest range of experiences via diversified touchpoints** that support advanced user interaction.
- **Architecture enabling a flexible retail concept** to speed up changes and facilitate integrations.
- Foster pervasive **Cloud and IOT** adoption for productivity and powerful analytics.
- Feature reach and **omnichannel ready POS platform** at the heart

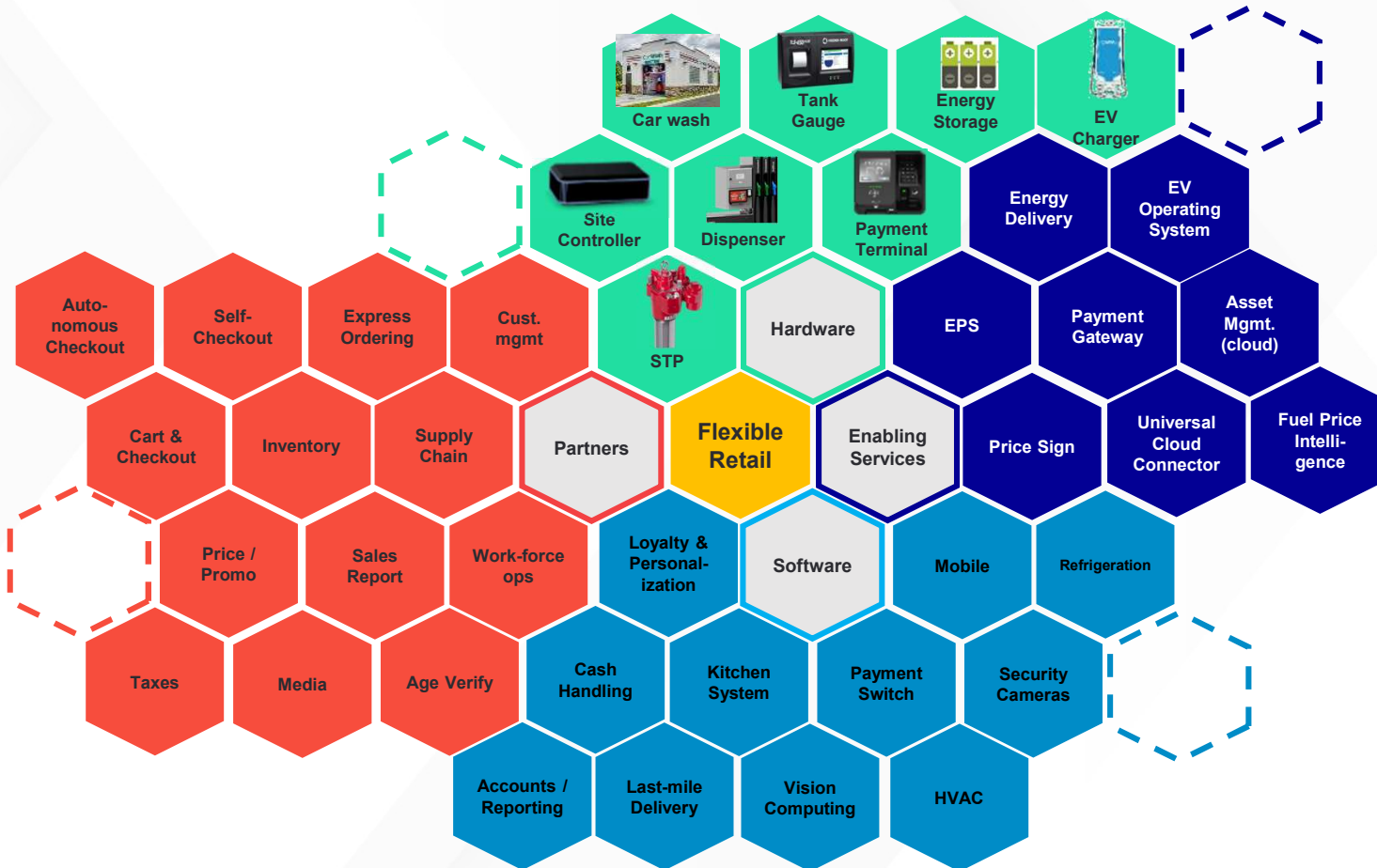
TECHNOLOGY



DIVERSIFIED RANGE OF TOUCHPOINTS

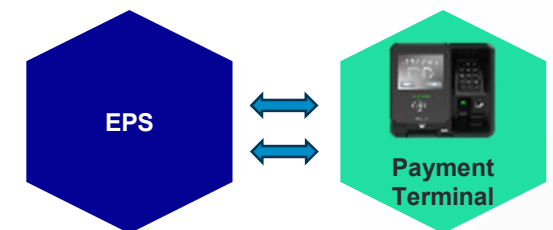


FLEXIBLE RETAIL VIA A COMPOSABLE SOLUTION



- ✓ Shift from the traditional concept of point/monolithic solutions to a modular & interoperable design
- ✓ Easily bolt-on new features & services
- ✓ Seamlessly rollout of updates
- ✓ Enhanced uptime
- ✓ Simplified compliance
- ✓ Optimal capital outlays

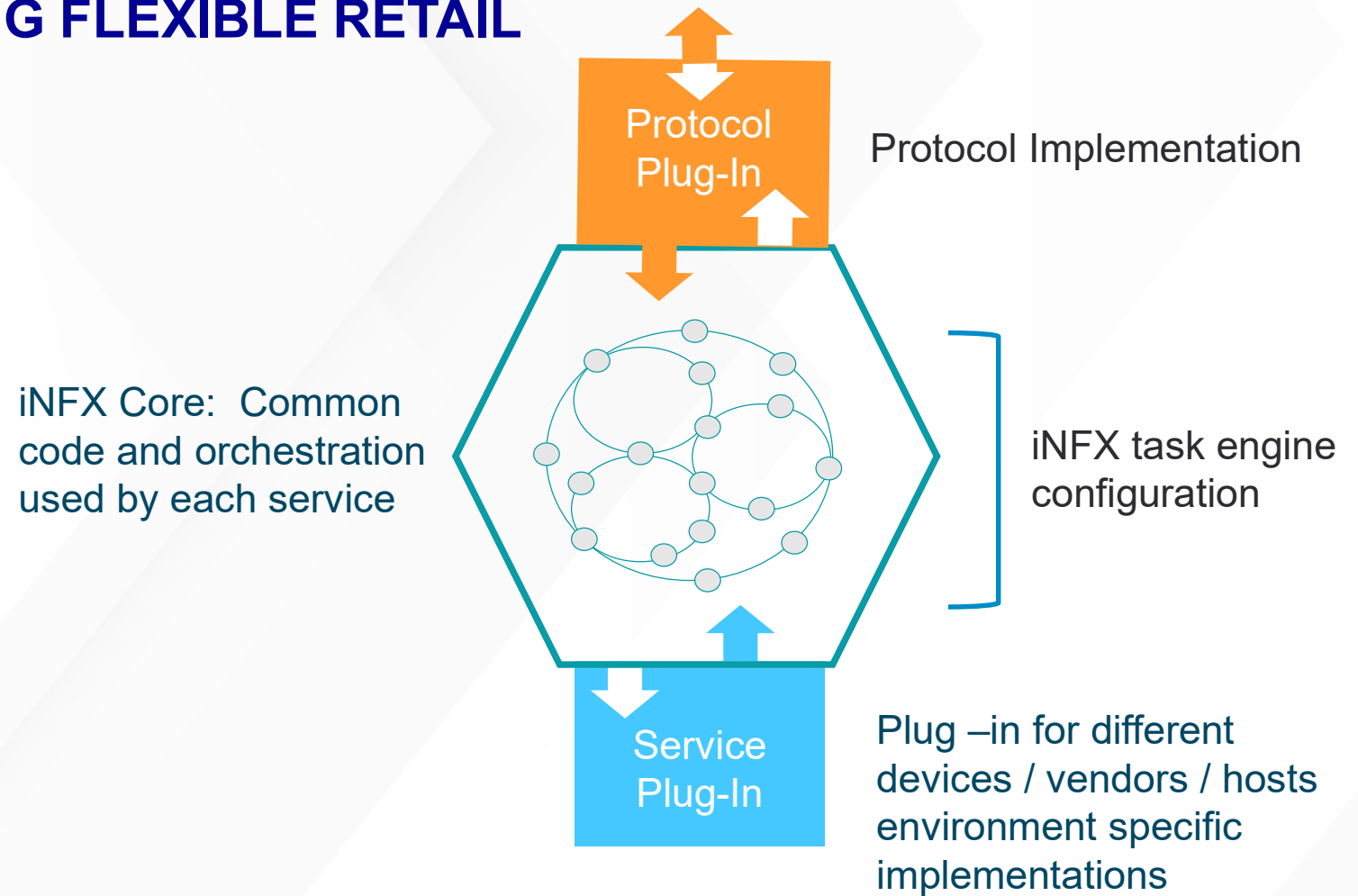
Industry Standard Interoperability



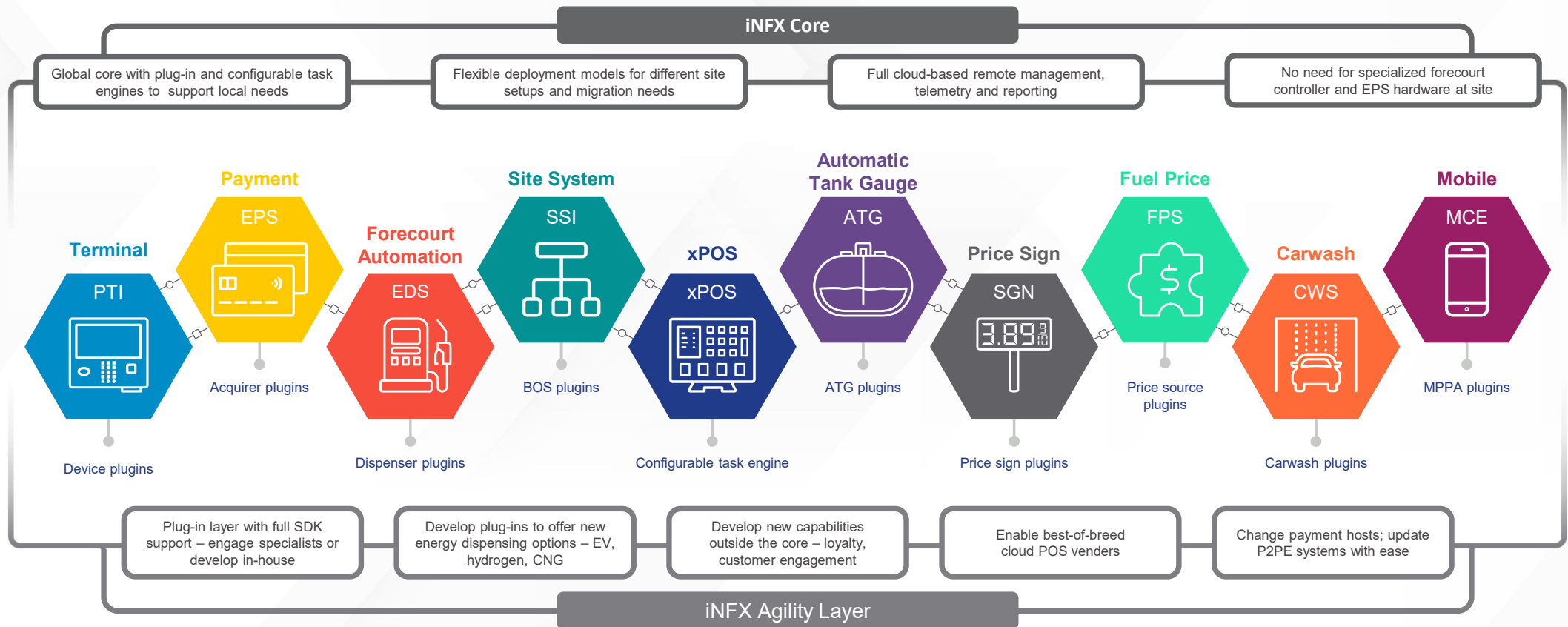
Built on the concept of microservices

INFX MICROSERVICES

THE CORE ENABLING FLEXIBLE RETAIL



iNFX | Bringing composable architecture to the fuel retail



EMERGING USE CASES FIT FOR FLEXIBLE RETAIL



Increase Revenue Yield

By streamlining the possibility to customize and evolve the consumer experience with agility while driving higher throughput.



Increase uptime

By deploying innovative architectures that maximize resilience (as an example with a fully autonomous dispenser), and restrict scope of upgrades to the target capability.



“Always On” Productivity

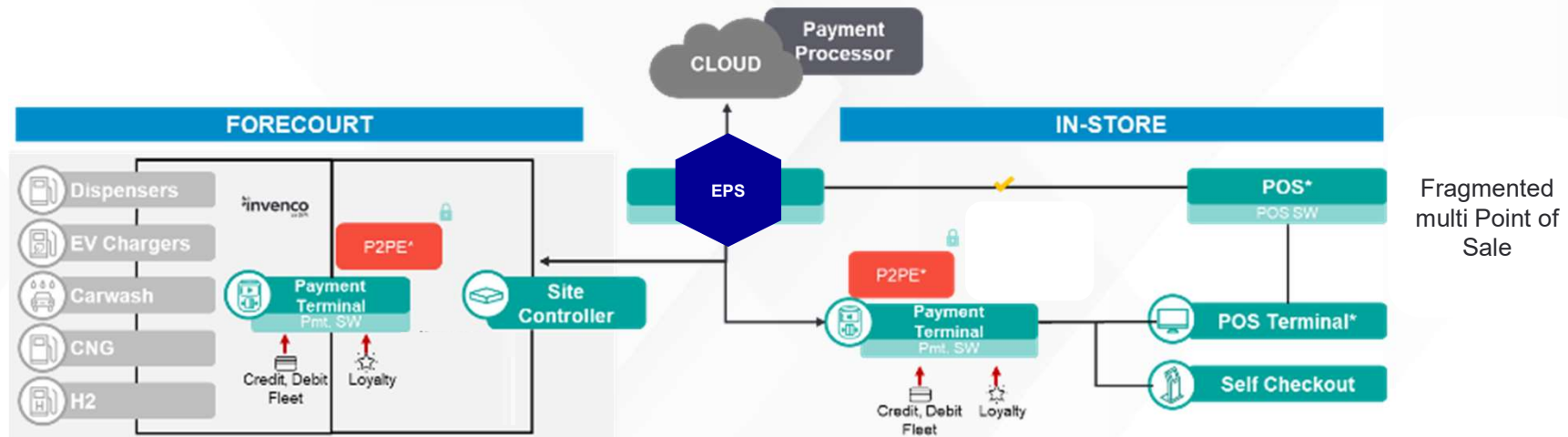
By linking devices and applications to the cloud for remote management including over-the-air updates and configurations.



Reduce Complexity

By completely splitting services of different nature with potentially different lifecycle.

REDUCE COMPLEXITY AND ALWAYS ON NEW PAYMENT INFRASTRUCTURE IN A MULTI POS ENVIRONMENT



Customer Challenges

- Large mixed asset estate with different POS/integrators
- High TCO on payment infrastructure
- Expensive, complex and time consuming adaptations over time

Solution

- New payment infrastructure delivered via one EPS microservice
- Minimal to no changes required on different POS platforms and split on lifecycles
- Security/functional updates delivered over-the-air
- Real-time asset management

INVENCO HUB, CLOUD & IOT



4 DELIVERY

The experience can also be customized by choosing specific features and selecting between DIY or managed services where applicable.

3 EXPERIENCE

The solution is open for being experienced via integrated UI or integrated via APIs available in dedicated implementation portals.

2 APPLICATIONS

A set of productivity and engagement apps is built on top of the hub. Common data schemas enable powerful analytics

1 HUB

Any hardware or software asset is managed, configured and tracked into the Hub platform

Solution

- Different business models in aprox.10 countries
- Different POS providers in place and present in multiple government regulations
- Existent integration with payment partners
- Visibility of service performance
- Increased the offer of payments methods in station with a POS and mobile application agnostic solution
- Partnership with payment partners and easy integration with 3rd party POS providers
- Development of a monitoring dashboard for visibility of transactions done by app
- Project management team & Help Desk for supported roll out

PASSPORT X RETAIL PLATFORM

Passport X POS



Easy-to-use online/offline Point of Sale that manages all types of sales and integrates with any modern hardware.

Passport X mPOS



A mobile Point of Sale for fuel attendants, providing ultimate flexibility in operating the forecourt.

Passport X e-commerce



A secure eCommerce platform supporting personalized connections both online and in the store.

Passport X Self



An agnostic POS solution that provides a frictionless shopping experience, while generating higher revenues

Passport X Engine



Centralized site business logic management that enables stability, modularity, and customizability.

Passport X HOS/BOS



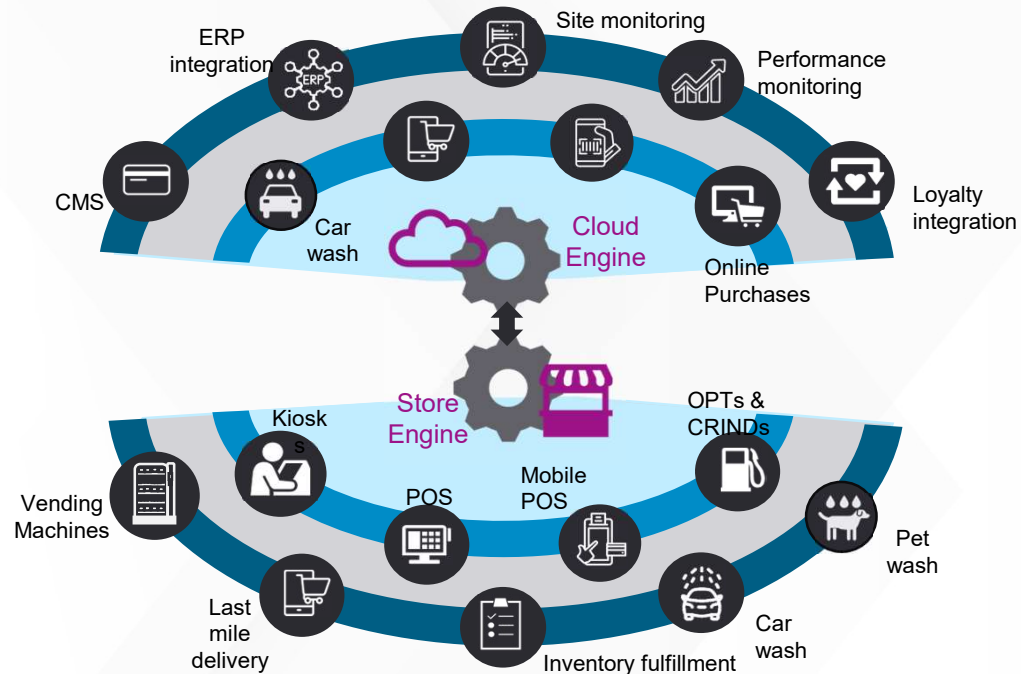
Multi-tenant cloud-based system for central management of any type of retail fuel network, specific stations, or stores.

Passport X Analytics



A flexible self-service tool that monitors the site data and creates impactful dashboards to highlight business insights and opportunities.

KEY CUSTOMER PROBLEMS BEING RESOLVED THROUGH PASSPORT X



Customer Challenges

- Uneven customer experience and unintegrated touchpoints
- Data collection from the field and reconciliation
- Inefficient control over partners (CODO, COFO, DODO...)
- Need more agility to pass from business ideas to their implementation in the retail network

Solution

- **Omnichannel** integrated customer experience through: Native touch points (POS, mobile POS, Self Check Out) and 3rd party touch points integration (Last mile delivery, Car Wash, Pet Wash, OPTs, Vending Machines...)
- **Single source of truth** through a connected quasi-real-time POS/BOS/HOS suite integrated with customers' ERP and other backend systems integration via API
- **Multitenant** solution to deliver the maximum benefits to both the company and its partners.
- Through Passport X open architecture, API and extensibility, integrations at site or HQ level are possible and easier. The retail ecosystem can grow organically and through 3rd parties' additions.

WHAT'S NEXT - FLEXIBLE RETAIL & THE AI FUTURE



- ✓ Creates foundation for rapid technology deployment
- ✓ Unlock revenue growth & productivity
- ✓ Optimize capital allocation



Flexible Retail creates the platform to rapidly implement AI solutions