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30% saving on your vehicle fleet budget





Reduction of your carbon footprint

Car sharing in brief

During the last decade, the global urban population has grown from 25% to 50%. 25 years from now, there will be nine billion people living together in urban environments, more than the entire population of the world today. In 2005, there were more than 890 million vehicles on the planet's roads. In 2007, this figure reached one billion. Today, the private car, unused 95% of the time, is the standard for urban, peri-urban or long-distance journeys. Are we condemned to accept this paradox? Of course not, there is a solution: car sharing. Rather than owning a private vehicle which remains idle most of the time, members of a car-sharing service have the opportunity to use a vehicle at their convenience and according to their needs.

A number of studies carried out by the University of Berkeley in California have shown that one car-sharing vehicle enables the removal of eleven private vehicles from circulation. According to Kevin Campbell, Manager of Fleet Services for the City of Chicago, his organization has made considerable savings by moving to car sharing. His fleet has decreased from 1,000 to 650 vehicles since the system was introduced. All told, Chicago has saved over seven million dollars since 1 January 2011. What are we waiting for?

This model is also suitable for B2B. Enabling a 30% reduction in the overall cost of a vehicle fleet, car sharing in companies represents an economical, sustainable and effective solution. The renowned consulting firm Frost & Sullivan thus estimates that by 2020, 80,000 vehicles are likely to be in use for car-sharing in European companies. The number of European companies introducing a car-sharing service

for their employees is set to grow from 200 in 2013 to 4,000 by 2020.





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Definition and challenges

Car sharing is defined as being a system in which a group of individuals having taken out a subscription use a fleet of self-service vehicles. In car sharing, there are therefore no privately owned cars, but vehicles available to all. They then use the vehicle according to their needs and only pay for their use. This practice is very beneficial from a financial point of view, since it means that the recurring costs of a vehicle, i.e. initial purchases, insurance, maintenance, etc., can be shared between all users. Furthermore, it enables reduction of the number of vehicles on the road, thereby favoring sustainable development as well as easing traffic congestion in city centers.

A brief history of car sharing



The idea of setting up a car-sharing service officially began in 1948, when the first such organization was founded in Zurich: SEFAGE (Selbstfahrergenossenshaft) which can simply be translated as 'Drivers Club'. Three years later, French engineer Jacques D'Welles had the idea of deploying a shared-car service in a pioneering article on urban traffic, published by the review Urbanisme in 1951! But it would be another twenty years before the launch of pilot initiatives such as the Minicar Transit System in Philadelphia (which went as far as to propose a hybrid vehicle prototype for car-sharing purposes) or projects such as Procotip in Montpellier, Witcar in Amsterdam, and STAR in San Francisco. In 1987, in Zurich once again, the ShareCom cooperative was established, and would become the national carsharing system Mobility Car Sharing. A year later, Germany also entered the car-sharing field with the Stattauto service. As for Asia, it would not be until 1997 that the first pilot initiatives would emerge in Singapore and Japan. In France, the first car-sharing organization, La Caisse Commune, was launched in Paris in 1998, followed by Auto'trement in Strasbourg in 1999.





Several dynamics can be noted with regard to the postmodern evolution of car-sharing. Firstly, a very important figure to be aware of is that the rate of growth among car-sharing subscribers between 2002 and 2006 was more than 130% and has continued to grow exponentially. Ultimately, various studies thus indicate that the number of users of car-sharing services is set to exceed 12 million by 2020!



What is B2B car sharing?

Aligning themselves with the new mobility paradigm, companies too have moved from an approach based on car ownership to one of using an ecomobility service. B2B car sharing has thus become an invaluable tool allowing companies and local authorities to optimize their TCO (total cost of ownership) in a highly effective manner. This new trend therefore represents a real opportunity in terms of fleet management.

Fleet administrators now have their own self-service fleet management tools enabling the collection of information on the rate of use of vehicles and real-time booking management. There are many benefits, including fleet rationalization, outsourcing of services, and optimization of the number of vehicles. Costs are considerably reduced by replacing other expensive means of travel such as shortterm hire, taxis, or mileage allowances.

The democratization of connected vehicles combined with the economic downturn has thus made car-sharing solutions all the more attractive. With the considerable challenges of congestion in urban centers, carbon footprint concerns, and easier access to public infrastructure, the need to have a car dedicated to each employee for professional travel now seems to be on the decline.





A review of the technology

Having developed in various forms according to the needs of users, B2B car sharing currently has three typologies. Since each has its own advantages and limitations, it is important to find the right balance between user experience, fleet administrator considerations, and the resources deployed:

- Return-loop car sharing corresponds to taking a vehicle from one of the stations exclusively dedicated to this service, then returning it to the same station. This form is predominant in the B2B market and facilitates management of the available pool.
- One-way car sharing is quite similar to the loop form but differs in that the user can leave the vehicle at any station. It is therefore essential to closely monitor and supply areas where there is high demand.
- Free-floating car sharing involves providing users with self-service vehicles inside a designated area. The operator's vehicle fleet will therefore always be present within this area, in constant movement, hence the name "free-floating".





Due to the diverse range of stakeholders in the B2B carsharing market, the technological approach is multi-faceted. Operators are therefore looking for technology partners supplying a system which is reliable, efficient and easy to install. While all of them offer automatic vehicle access together with booking and information management, there are differences nonetheless in the solutions available on the market:

- With an access badge. This solution enables users to open the vehicle with an RFID car specific to the service. This technology can also be combined with a company badge.
- With a smartphone (NFC). It is now possible to open the vehicle using a smartphone equipped with NFC technology. This makes for a much simpler user journey, but the main constraint is the need to own a smartphone (27.7 million French people have a smartphone, i.e. one in two).
- Via a mobile application. Connected to the car-sharing service's information system, a mobile car-sharing application enables users to make a booking, unlock a vehicle, etc.





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Having become a reality for the general public, and with an estimated 12 million members worldwide by 2020, the market is enjoying explosive growth of more than 41.35% per year. And yet, this practice in the B2B context is nothing new. For example, it was widespread in Eastern Bloc countries in the 1950s, and many corporations have been using it in the United States for over a decade. Similar growth is being seen in Europe, where the B2B market is predicted to grow significantly from 2,000 vehicles at the end of 2013 to over 100,000 by 2020. It seems, on this basis, to be growing more quickly than the B2C market, as indicated by the English market, where there is a 29% increase in the number of users, compared to 13% for B2C. The number of companies having an in-house carsharing service is, in turn, set to jump from 200 in 2013 to 4,000 by 2020. France has today become the 2nd fastest growing market in the European B2B sector, after England.



- 3.5 million car-sharing service members in late 2013.
- 6 billion dollars in global revenue estimated by 2020.
- 100,000 car-sharing vehicles in Europe by 2020.
- 4,000 European companies will be using car-sharing by 2020 (200 in late 2013).
- 80% growth in the Chinese car-sharing market in 5 years.





The democratization of this practice clearly illustrates the trend towards collaborative consumption. It can be defined as an economic model in which use takes precedence over ownership. The use of an item, a service or a privilege can be augmented by sharing, selling or hiring it. Collaborative consumption has three key pillars: use, the ecological aspect, and the reestablishment of a social link. Until recently, the car represented a status symbol (52% associated it, twenty years ago, with the idea of social success), but now seems destined to become tomorrow's form of public transportation. A real paradigm shift is therefore underway, moving from ownership to use, as shown by figures from the Cetelem market research agency in 2014:



Source: Observatoire Cetelem (2014)







Moving from object to service

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The car is an object which provides a low-cost means of maximizing personal time. Supported by public policies as a strong driver

of regional development, thinking on this issue has undergone significant change. We are now dependent on this means of transportation. Households as well as companies are therefore increasingly turning to alternative solutions, even if they would still like to have cars. At the same time, the barriers which once prevented experimentation with alternatives such as car pooling or car sharing are now falling.

Back in 2007, I wrote that the move from object to service was already underway. Digital technology clearly allows us to envisage other forms of use than the traditional models. I believe that the car as a service will gain increasing market share as we look to 2030-2050. We can already see this with the excitement and mystery surrounding the driverless vehicle. Manufacturers will undoubtedly become just one of a number of other stakeholders, as this service-based approach entirely upends the value chain and legitimizes automation of the overall process.





Gabriel Plassat Specialist at the Transport & Mobility Dept. of the French Environment & Energy Management Agency (ADEME)

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Car-sharing in companies and local authorities represents a genuine response to the challenges of the 21st century. This system offers a solution which could cut the number of vehicles in the pool by 30%, while still ensuring the same volume of travel. With online bookings and keyless access via RFID/NFC, B2B car sharing is easy to use and convenient both for employees and fleet administrators. Finally, there is also a real benefit in terms of CSR, since B2B car sharing is proving to be a real catalyst for the introduction of electric vehicles into corporate automobile fleets, thereby reducing CO2 emissions. Research has shown that, on average, a corporate fleet under a car-sharing system reduces its emissions of CO2 by 15 g per km compared to a traditional pool of vehicles.

A quadruple-benefit asset





What's more, B2B car sharing and its potential to offer employees the possibility of using company vehicles outside working hours enables the attainment of between 20% and 40% of the vehicle's monthly hire costs. The quadruple benefit can be seen as follows: An innovative service for employees, a much lower TCO (total cost of ownership), optimized fleet management, and a reduced carbon footprint.



Focus on the pro/personal option

The idea of now extending a professional car-sharing service to private travel undertaken by its employees on evenings and weekends, in return, naturally for a certain financial contribution, arose from two very concrete factors. Firstly,

the commitment by Orange's management to place people at the heart of the company and therefore offer innovative services to its employees. Secondly, the fact that a certain number of vehicles can be underused in terms of mileage. After all, if the initial service plan is sometimes not reached, readjusting it is expensive! Ensuring that vehicles are driven more often enables closer fulfillment of the contractual service plan.

Orange has underlined its strong commitment in terms of corporate social responsibility. In this way, sharing vehicles between users can be a means of positioning oneself within the framework of servicebased cars whose use will be adapted to a particular purpose (electric for under 100 km per day, hybrid or diesel for longer journeys, for example).

The service was expected, but we did not expect such a high level of popularity among employees. By way of illustration, the post announcing the launch of the pro/personal service at Orange received more clicks than the one which announced our annual results! So it has been a real success, and we can see that there are now as many bookings made in the evenings as there are at weekends.



Patrick Martinoli Orange Projects and Innovations Director.

A multi-modal approach with a single interface

Previously accustomed to basic management tools, on paper then computerized, companies have seen their fleet of vehicles and their use rapidly exceed the resources which were at their disposal. Software platforms dedicated to fleet management very quickly emerged. But business development requires more numerous journeys and, in a general manner, more complex mobility. Today the trend is towards multi-modal, in the sense that the virtuous models are those which have been able to integrate car-sharing into a global mobility service for companies as well as local authorities. B2B car sharing is therefore a natural evolution in the range of services offered by hire firms and should really be thought of as a global corporate mobility platform enabling employees to use different modes of mobility charged within a single cost platform.







Connected to fleet management

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The vehicle fleet, whether purchased or hired, occupies an important position in the life of a company. It often represents the second largest item of expenditure.

With a connected fleet management system, it is now possible, for both large and small fleets, to monitor the cost and use of your vehicles. In other words, the company can take charge of this information once again and improve the use of its vehicles.

Today, more and more companies and local authorities are sensitive to the ecological dimension of their fleets. Being able to set up ecoresponsibility plans makes it possible to accelerate in-house awareness-raising.

In my view, fleet management is closely interconnected with car sharing. The complementarity is of course obvious, in the sense that fleet administrators now have access, through fleet management services, to complete reports. They therefore very quickly realize that the volume of their fleet is not necessarily in line with actual needs. Introducing a shared fleet then represents a real and effective solution allowing them to reduce the size - and therefore the cost - of their fleet, while still ensuring the same volume of travel.

Finally, in terms of market developments, I can certainly imagine the provision of data to insurers, hire firms, mechanics and HR departments, for example! The fact that manufacturers will undoubtedly eventually offer provision of this data is an opportunity, as they will be mono-brand. Multiple interfaces will therefore be a real blessing.





Jean-Philippe Giazzi Commercial Manager Mycar Innovations





The perspective of the TSRC at Berkeley



Susan Shaheen Co-Director,Transport Sustainability Research Center University of Berkeley



Adam Cohen Research Associate, University of Berkeley

The TSRC is recognized for using a broad spectrum of analysis and evaluation tools, including questionnaires, interviews, focus groups and automated data collection to analyze and interpret its findings. The research center produces analysis and recommendations concerning key elements of the transportation industry.



In our previous report devoted to the annual research meeting on transportation, we constructed a ten-year retrospective on the basis of a study

which arrived at the conclusion that there were, to our understanding, three distinct phases in the development of the market: An experimental phase between 1994 and 2002, a diversification phase from 2002 to 2007, then a final large-scale commercialization phase since 2007. We can be certain today that another phase will emerge in the future, one which is not yet known. This next stage will most probably be brought about by technological development, particularly at the level of driverless vehicles, and advances in sharing models towards increasingly flexible and centralized services. Today it seems clear to us that the future of shared mobility services will be composed of a single platform and a multi-modal offer.

Finally, we believe that urban mobility 2.0 will be composed of more individuals using shared transit, home working, a better multi-modal offer (with and without a car) and on-demand services. We do not believe that driverless vehicles alone are the future of mobility, but we feel that they are one of the pillars of its development.



UNIVERSITY OF CALIFORNIA Berkeley Transportation Sustainability RESEARCH CENTER

Shared space: When corporate and personal mobility solutions converge

Urbanisation and connectivity are revolutionizing our ways of thinking. These changes, initially seen in personal mobility, are now indirectly influencing the B2B market. This market is now facing the same challenges as those faced earlier by the B2C market. Companies are questioning the need to own vehicles dedicated to specific employees.



From hybridization of services



The evolution of the B2B car-sharing market is highly predictable due to the advantage of being able to democratize this practice among most of

company employees, so that they become customers for their private travel. This corporate roll-out of car sharing is a win-win-win service at every level.

Furthermore, the company car as a benefit in kind for a corporate executive is losing appeal as corporation tax increases and is also becoming less attractive to executives in any case, some of whom would not hesitate to trade their company car for multi-modal mobility credits such as a public transit subscription + bicycle + car-sharing credits, for example.

Direct car sharing between companies (both public and private) remains, for the moment at least, at the experimental stage as far as we understand, but it is being spoken of more and more. This represents an enormous pool of shared cars, with the advantage of being easily operational anywhere in the country, including areas of lesser density where commercial car sharing may have difficulty developing due to sparse demand.



Jean Maxime CEREMA specialist Mobility Department





To multi-site projects

We are already working today on multi-site car-sharing with Mobility Tech Green. Effectively, the objective was to give each

local transport correspondent an overview of their own vehicles, by organizing several levels of hierarchy in terms of administrator rights (local, regional and national). e-Colibri is thus well-suited to the different constituent layers required for our organization.

On the user side, there is also a considerable gain in terms of accessibility and flexibility. In this way, an employee at Issy-les-Moulineaux can book a car-sharing vehicle located in Arcueil if they require it at a given time. Anyone has access to all types of vehicle, no matter where. The paradigm of use is therefore shifting towards mutualization while that of management moves towards decentralization. A highly innovative form of car sharing has therefore emerged as the natural choice in the course of our partnership with Mobility Tech Green.

Additionally, the fact that it already operates in multi-site car sharing allows Mobility Tech Green to offer a multi-company service. Indeed, we are currently in the experimental phase with Paris City Hall for overflow management. Our internal multi-site management could therefore be easily transferable to inter-company car-sharing experiments. In this regard, it enables savings in term of space and pollution, which clearly links into the CSR aspect. The company does not, however, replace the public authorities, but rather becomes itself one stakeholder among other entities!





Patrick Martinoli Orange Projects and Innovations Director.

What are the consequences for employees?

As we have already seen, a profound change is currently underway in terms of our relationship to mobility. Ownership-based approaches are being superseded by concepts based around use. Rethinking our consumption has thus become essential and is revolutionizing private spheres in its own way.



A paradigm shift



Eric Lebreton Professor of Sociology Specialist in mobility



The company has now become the latest location for sharing. It is therefore entirely normal that current collaborative consumption practices are entering

in these living, interactive spaces Urban frameworks have for a number of years been subject to the concept of what I call "disownership" of the car. There are also very strong indicators in this direction. For example, the age of obtaining a driving license is being significantly deferred. The wish to drive is also diminishing. Indeed, for some ten years now, the distinctive value has greatly decreased, due to the fact that everyone owns a private car. People today are calculating the benefit of purchasing a car and reassessing its importance.

We have therefore observed, for some time now, a deep change in mobility desires among individuals. Companies will therefore be confronted with the same challenges as local authorities, which had to upgrade public transport. In this regard, in 1975, collective transportation barely existed at all. Over the course of twenty years, incentive policies combined with training and information programs brought this practice back into cities. This is a problem of relays, not just of communication. Companies committed to implementing an internal car-sharing service will therefore need to support this change and take advantage of these relays of influence.



So, as we have just seen, the implementation of a car-sharing system positively supports the collaborative culture within companies and local authorities. The importance of handling such a mechanism in an organic manner is therefore key to the success of such services. But what are the motivating factors which encourage employees to use an internal car-sharing service?



The UTAUT model

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A few studies have been conducted around the world on the determinants of car-sharing use. To our knowledge, no study has yet been undertaken

which has essentially focused on company car sharing. And yet, it is logical to suppose that the psychological determinants of the use of a car-sharing service in a professional context are partly different from those observed in relation to use by private individuals. For example, questions of costs (such as insurance-related costs) are no longer relevant when the user does not have to pay anything to use the service.

Generally, if someone is reluctant to use car sharing it is because they believe it will be complicated and restrictive. The most important thing is therefore not to prove them right. In particular, this means having an adequate fleet (to prevent vehicle unavailability) and a booking system which is as simple as possible. The second key lever to encourage acceptance of the service is user support. This involves providing help and information around use of the service. This may take the form, for example, of a video tutorial to be viewed at the time of first use.

For this purpose, an electronic questionnaire was specially designed by LOUSTIC which seeks to asses the principle psychological factors which influence acceptance of the car-sharing service (perceived usefulness, social norms, etc.). This questionnaire was made available online under restricted access and distributed by Mobility Tech Green to a group of professionals having access, within their working structure, to a fleet of car-sharing vehicles.



Sylvain Fleury Scientific Coordinator LOUSTIC

Firstly, the image questionnaire allowed us to examine descriptors which participants associated with car sharing (the number of occurrences identified is in green):



Based on the above results, it turns out that the two most important factors reported by participants are diametrically opposed between simplicity and complexity, although a majority associate car sharing with the simplicity and practicality of the system (185 occurrences). In other words, the image associated with car sharing is mainly related to effort expectancy. It is immediately apparent that the issue of ecology appears much less (33 occurrences) than ease/difficulty of use.

In a second phase, we produced a structural equation model. The primary objective was to observe the impact of the factors measured on use intentions, based on the UTAUT model produced from the literature.

Leboratoire d'observation des usages des technologies de l'information et de la communication



This second stage therefore involved checking for the presence of mediated effects. In other words, it was a guestion of testing the hypotheses according to which a given factor indirectly affects use intentions, by influencing another factor. We looked at the effect of perceived ecological character to finally arrive at the following model:



An analysis of the results shows that the strongest consideration concerns the ease of use of the system. Indeed, if we increase effort expectancy levels by one standard deviation, this increases use intentions by 0.39 and performance expectancy levels by 0.79. This therefore represents a decisive factor for increasing the use of car sharing: the simpler the system is to use, the more use will potentially be made of it. This observation confirms the results of the image questionnaire.

Laboratoire d'observation

et de la communication

Conclusion: Employees are sensitive to three variables in terms of their intention to use a car-sharing service. Firstly, training is the most important thing for them. Supporting the launch of a service with communication tools and an e-learning program will greatly favor their willingness to use the service. Secondly, it is essential for them that the service is easy to use. Since change is often a source of anxiety, perceived ease is absolutely crucial. Finally, the car-sharing service must be efficient and effective both technically and in terms of customer service. It is therefore important to take account of the entire life cycle of your car-sharing program and to include it in the company's internal communication plan.

We will support you with your car-sharing project. Get in touch on 02 23 27 52 52 or at www.mobilitytechgreen.com

LOUSTIC Laboratoire d'observation des usages des technologies de l'information

Looking to the future

Shared vehicles currently represent 0.2% of total European corporate fleets, and are estimated to reach 5% by 2020. The number of employees having access to an in-house car-sharing service is thereby set to grow from 38,000 today to 2 million by 2020. This represents 15-20 employees per vehicle and corroborates the research findings on the rate of replacement of private cars. But a new form of car sharing could emerge within the next few years and disrupt traditional mobility patterns: car sharing with driverless cars.



Car sharing with driverless cars

With the advent of connected vehicles, we immediately and primarily think of road safety. Intelligent cars able to communicate regarding their speeds and their positions with the other cars in circulation promise a significant reduction in road-traffic accidents. But this is only the beginning of a real revolution. Indeed, combining connected vehicle technology with the architecture of Smart Cities and driverless cars opens up an incredible range of possibilities. The very thought of driverless taxis taking you from your home to your workplace is mindboggling. In this sense, a world without road-traffic accidents will only be the prelude to a world where car ownership becomes ridiculous.



A user books a driverless car with their smartphone, the car arrives at their door and takes them to their destination. The driverless vehicle can then either return to its pool and recharge itself, or honor another booking! Indeed, this is an idea which is gaining ground, with a recent study carried out by MIT led by Emilio Frazzoli estimating that a fleet of 300,000 driverless vehicles used for car sharing could meet the mobility needs of the entire population of Singapore (approx. 6 million) with a maximum waiting time of just 15 minutes per booking!





Alain Kornhauser Director, Transportation Program Princeton University



Researcher Alain Kornhauser of Princeton University, working on driverless vehicles, predicts that "what is undoubtedly going to happen is that no one will own a car any more! If you have access to mobility it makes more sense to buy the content than the container." "The problem today is that people buy a vehicle to meet their potential mobility needs. But driverless cars are really changing the equation. At present, fewer than 17% of household vehicles are in circulation at any one time. Even if a tiny fraction of these unused cars were replaced by car sharing with driverless vehicles, the reduction in overall mileage costs would be huge," he explained to us. His claim seems all the more likely when we consider that one in four members of car-sharing services have given up their private car!

Research directors Brandon Schoettle and Michael Sivak refer to how "a driverless vehicle could considerably increase its rate of use and replace a number of private vehicles if used as a shared mobility service." Researchers thus project that the level of ownership of private cars in the United States could then drop from 2.1 to 1.2 with such services.



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In conclusion

In a context of economic stagnation, automobile fleets have become one of the key considerations in cost-reduction strategies. Based on the fact that a non-shared vehicle is idle, on average, for 95% of the time, companies and local authorities are increasingly looking to these alternative solutions. Whether for economic, ergonomic or ecological reasons, B2B car sharing, as we have just seen, has become established as a long-term underlying trend.

I would like to be contacted by an advisor



About Mobility Tech Green

With over 12 years of experience in the B2B car-sharing sector and 100,000 users of our solutions, we offer a range of car-sharing services providing real savings for companies and local authorities, combined with an effective reduction in CO2 emissions. We are now at the forefront of a new vision of mobility, a new world. At the crossroads of the connected car, smart cities and collaborative consumption, Mobility Tech Green is ready to meet the major challenges of the 21st century through technological innovation.

Welcome to the world of disruptive [R]evolution!

Mobility Tech Green



"This is a question of instigating change, of no longer thinking in terms of possession but of use. We are therefore going to offer more employees the option of using a car-sharing vehicle. This will enable us to reduce the use of taxis, prevent the use of private cars and therefore the payment of mileage allowances, and alleviate difficulties with public transport in some areas," explains Jean Zermati. Orange's fleet manager thus plans to have 1,000 vehicles for car sharing by the end of 2015: "After four or five years of deployment, we hope to reduce the size of the fleet by a few thousand units, which will also mean a few million euros in savings." With important benefits such as a 30% decrease in the existing fleet and reduction of mileage costs by 50%, car sharing is becoming the most popular mobility solution for companies.



All-electric cars will not change this; we need to rethink the way in which we travel. There are currently more than a billion vehicles on the planet's roads, and according to the United Nations, this figure is set to triple by 2050. At this time of energy transition, the advances achieved in the automobile sector and beyond may give us cause to believe that we are close to a sustainable solution. And yet, all these developments have no effect on the problems related to congestion in urban centers. The only answer is to reconsider the way in which we travel.