

FLEET AND MOBILITY BAROMETER 2026

COUNTRY REPORT 

1 FLEET CHARACTERISTICS

2 FINANCING METHODS

3 ENERGY MIX

4 CONNECTED FLEETS

5 EMPLOYEE MOBILITY

6 FUTURE CHALLENGES



RESEARCH APPROACH

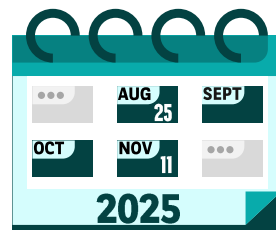


10,157

INTERVIEWS WITH
CORPORATE FLEET
DECISION MAKERS

20-MINUTE
PHONE INTERVIEWS

FIELDWORK
(ALL COUNTRIES)



READING NOTES ABOUT THE REPORT

Some graphics may not be perfectly equal to 100%. It is due to roundings.

RESEARCH OBJECTIVES

1



What short term shifts
are shaping the market?

2



What kind of vehicles will
the market expect in 3 years?

3

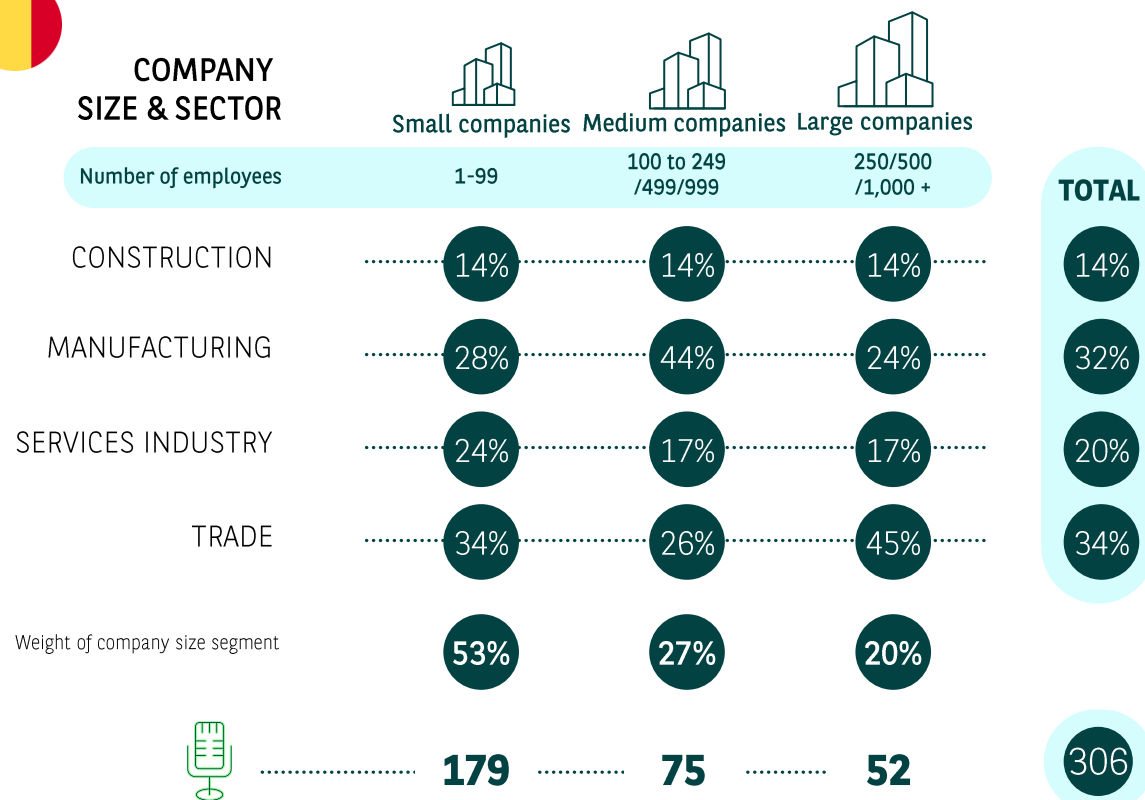


How do mobility solutions
impact corporate mobility?

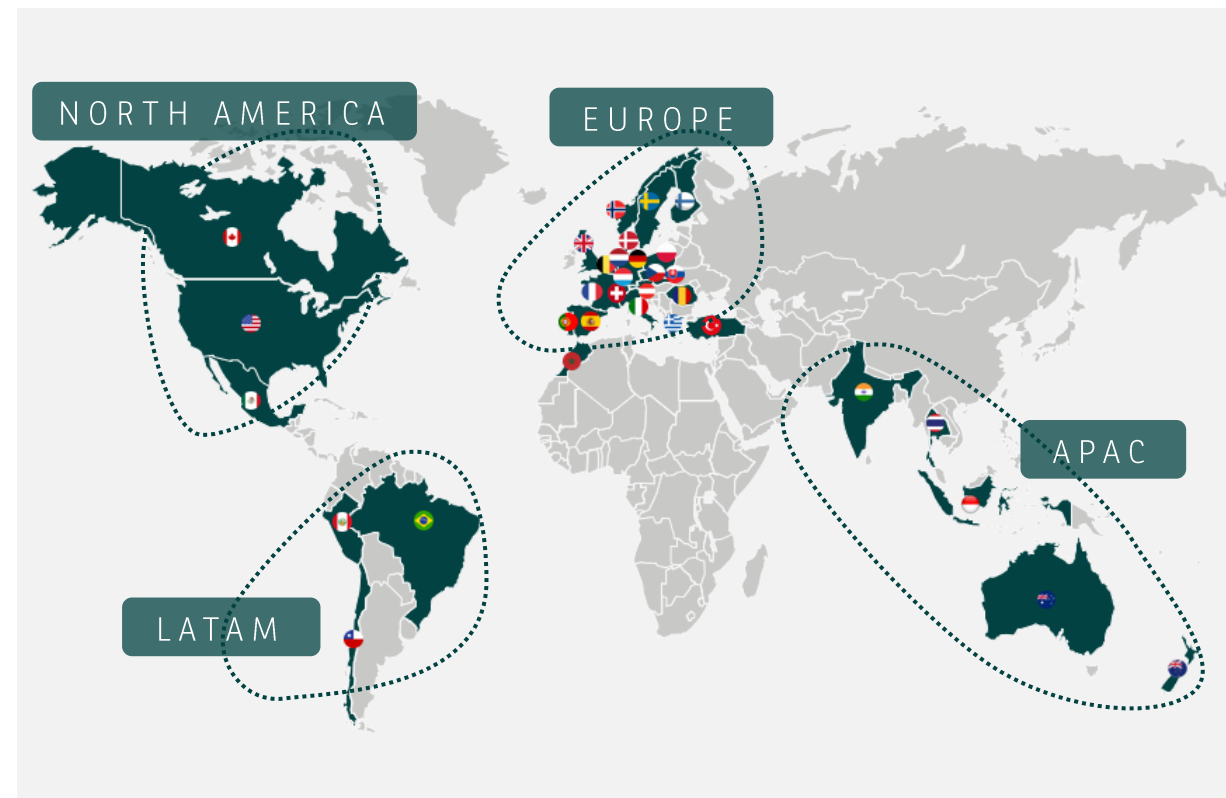
QUOTAS ON COMPANY SIZE & INDUSTRY



COMPANY SIZE & SECTOR



33 COUNTRIES - 4 REGIONAL BENCHMARKS



Morocco and Turkey: compared with Europe benchmark





MOST ROMANIAN COMPANIES MAINTAIN A POSITIVE FLEET OUTLOOK

91% anticipate their fleet will either remain stable or grow in the next 3 years (with 25% expecting growth)

42% include second-hand vehicles in their fleets, aligning the European average of 41%. 36% are considering it



A STABLE AND PROMISING GROWTH POTENTIAL FOR OPERATIONAL LEASING

49% intend to introduce or increase their use of full-service leasing to finance their fleet, higher than the European average of 36%

14% quote full-service leasing as the main financing method for their fleet. A stable figure lower than the European average of 28%



FLEET ELECTRIFICATION REMAINS LIMITED COMPARED TO THE EUROPEAN AVERAGE

24% already use electrified passenger cars, below the European average of 57% and stable vs. 2025. 38% are considering it

54% of fleet managers claim they would take all necessary measures to comply if regulations required an exclusive switch of passenger cars to BEVs by 2030, while **41%** would offer a mobility budget instead of a company car



STABLE TELEMATICS ADOPTION WITH SIGNIFIANT GROWTH POTENTIAL AHEAD

39% have adopted telematics, aligning the European average of 37%

Only **20%** of them use telematics data. However, the potential remains significant, with **47%** of companies considering leveraging this data.



ROMANIAN COMPANIES CONTINUE TO SUPPORT MOBILITY POLICIES AND SOLUTIONS, GUIDED BY CSR PRIORITIES

23% have already implemented short or mid-term rental or are considering to do so. Public transport compensation and mobility budgets remain the most used/considered

44% cite CSR considerations as their main motivation for developing corporate mobility, closely followed by HR needs (42%)



DECARBONIZATION AND INNOVATIVE FLEET MANAGEMENT SOLUTIONS TOP MANAGERS' AGENDA

Only **9%** have set targeted decarbonization goals to date but 39% are currently evaluating such goals. Electrification and adapting to ICE policies being are on top of the agenda

47% are spontaneously eager for innovative solutions that enhance fleet performance management

01

FLEET CHARACTERISTICS

What are the key characteristics of fleets?



Romanian companies remain confident about the future of their fleets for 2026

91% of Romanian companies expect their fleet size to remain stable or grow over the next three years, with 25% anticipating growth. These figures are consistent with the European average and stable across various company sizes and vehicle types.

Notably, medium-sized companies anticipating growth have increased from 15% in 2025 to 29% in 2026.

The share of Romanian companies using or considering second-hand vehicles remains significant

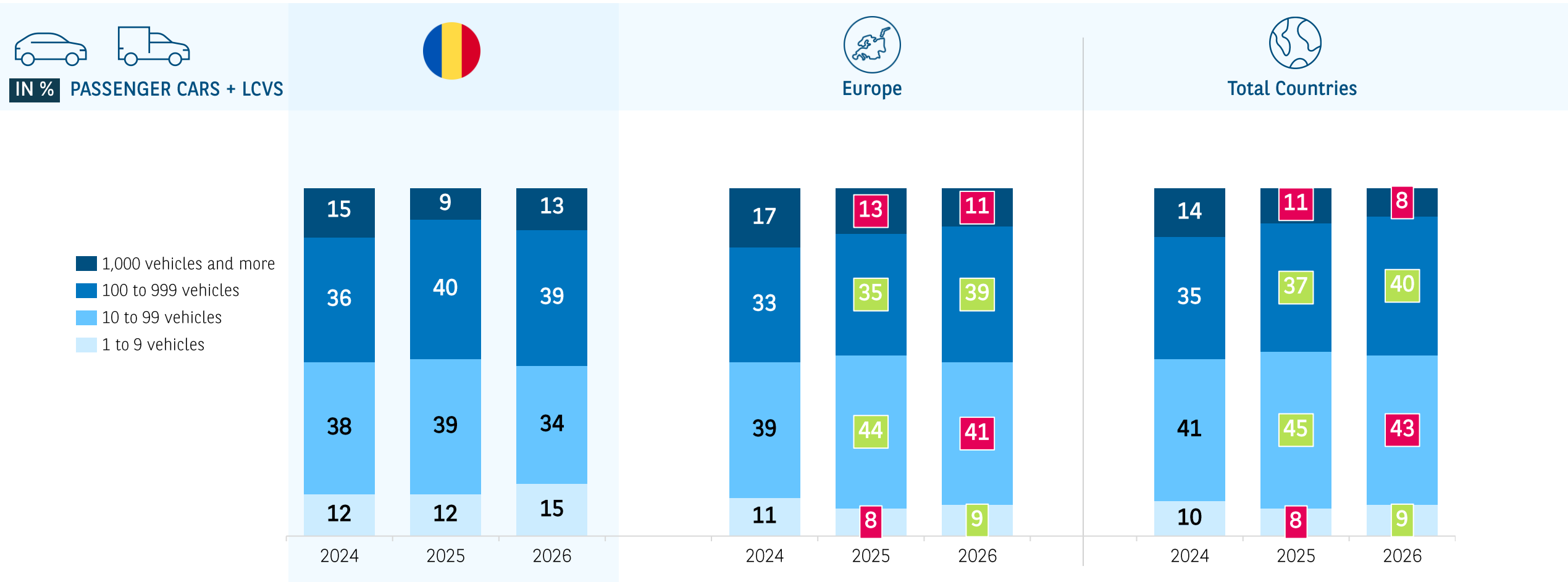
In 2026, 42% of companies in Romania already include second-hand vehicles in their fleets, aligning with the European level of 41%. Additionally, 36% are considering incorporating second-hand vehicles within the next three years, driven by large companies (49%) and medium-sized companies (42%) rather than by small ones (29%).

The penetration of second-hand vehicles is greater in passenger cars (33%) compared to light commercial vehicles (LCVs) (18%).

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In Romania in 2026, vehicle fleets are composed of: 15% with 1-9 vehicles, 34% with 10-99 vehicles, 39% with 100-999 vehicles and 13% with 1,000 or more.



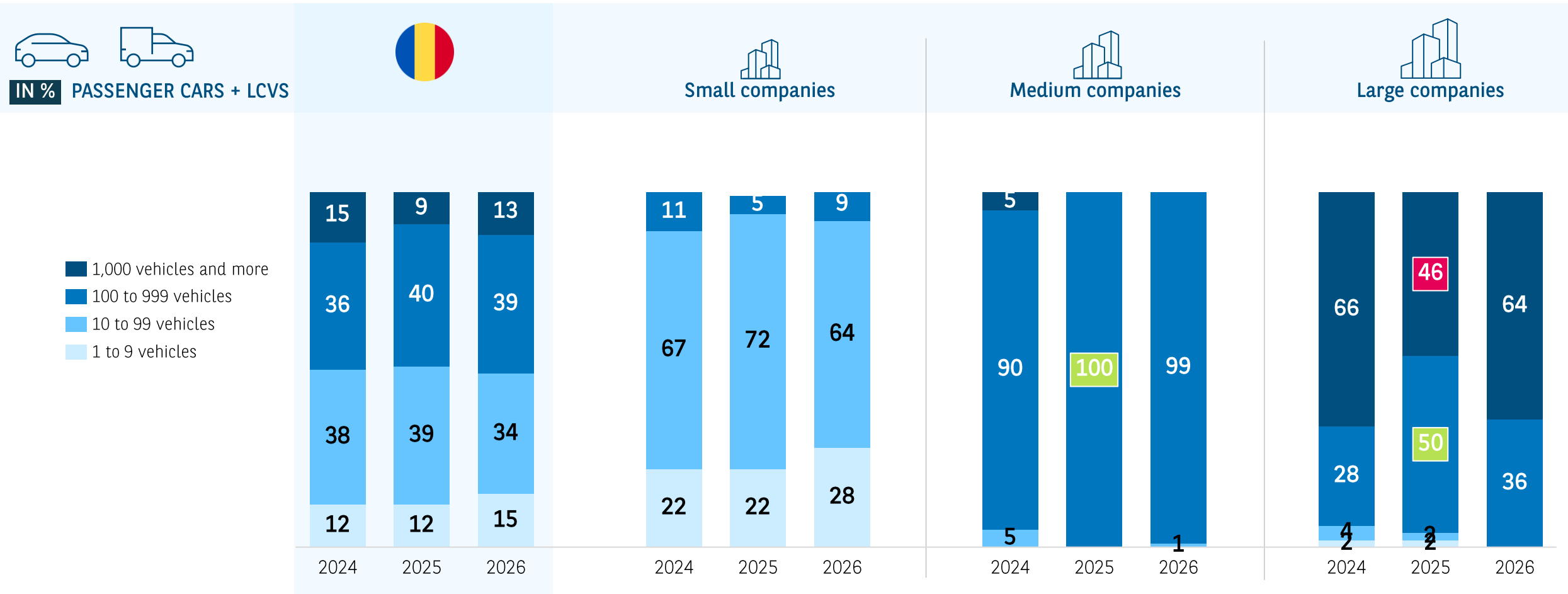
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF VEHICLES IN FLEETS

HOW TO READ THE RESULTS ?

In Romania in 2026, vehicle fleets are composed of: 15% with 1-9 vehicles, 34% with 10-99 vehicles, 39% with 100-999 vehicles and 13% with 1,000 or more.



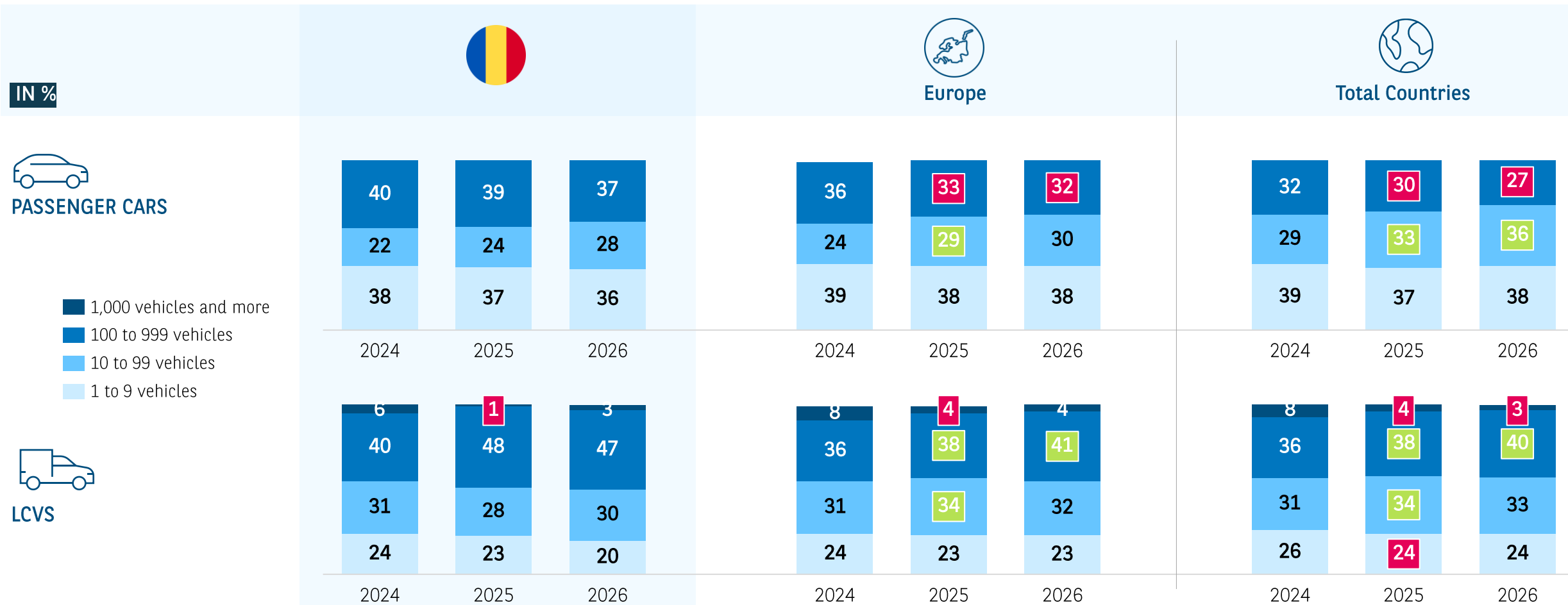
A5/ZDA5. Can you please tell us the total number of vehicles of less than 3.5 tons in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

NUMBER OF PASSENGER CARS AND LCVS IN FLEETS

HOW TO READ THE RESULTS ?

In Romania in 2026, passenger car fleets are composed of: 36% with 1-9 vehicles, 28% with 10-99 vehicles, 37% with 100-999 vehicles and 0% with 1000 or more. And LCV fleets are composed of: 20% with 1-9 vehicles, 30% with 10-99 vehicles, 47% with 100-999 vehicles and 3% with 1,000 or more.



A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

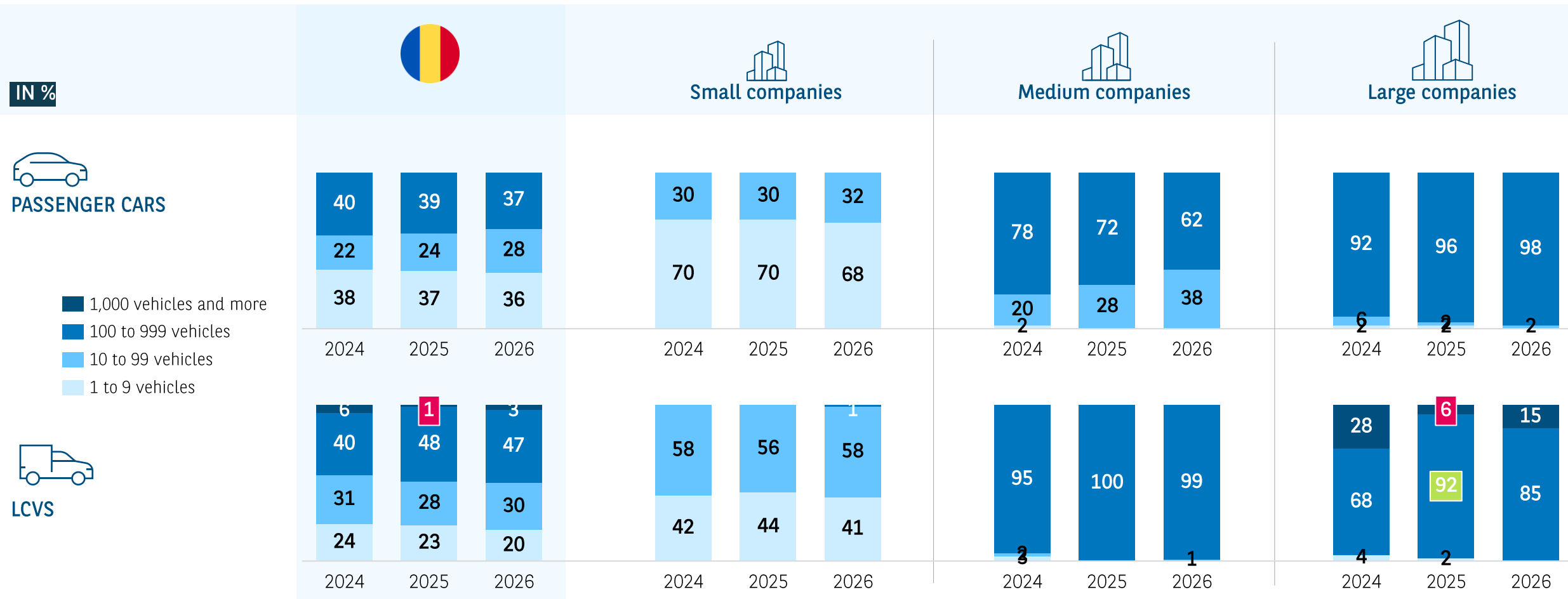
X% Significantly higher / lower vs. previous wave

NUMBER OF PASSENGER CARS AND LCVS IN FLEETS

HOW TO READ THE RESULTS ?

In Romania in 2026, passenger car fleets are composed of: 36% with 1-9 vehicles, 28% with 10-99 vehicles, 37% with 100-999 vehicles and 0% with 1000 or more.

And LCV fleets are composed of: 20% with 1-9 vehicles, 30% with 10-99 vehicles, 47% with 100-999 vehicles and 3% with 1,000 or more.



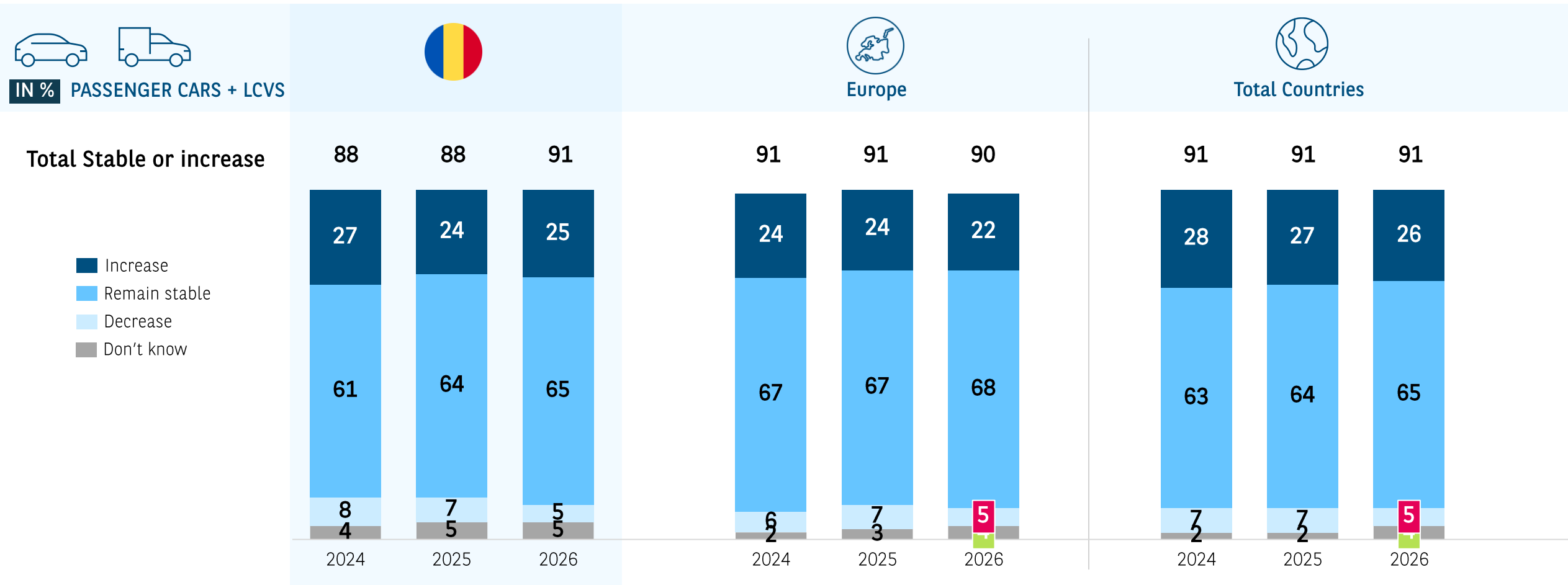
A5F. Can you please tell us the total number of cars and then the number of LCV's or vans in your fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Romania in 2026, 91% of the companies expect their fleet to remain stable or to increase in the next 3 years.

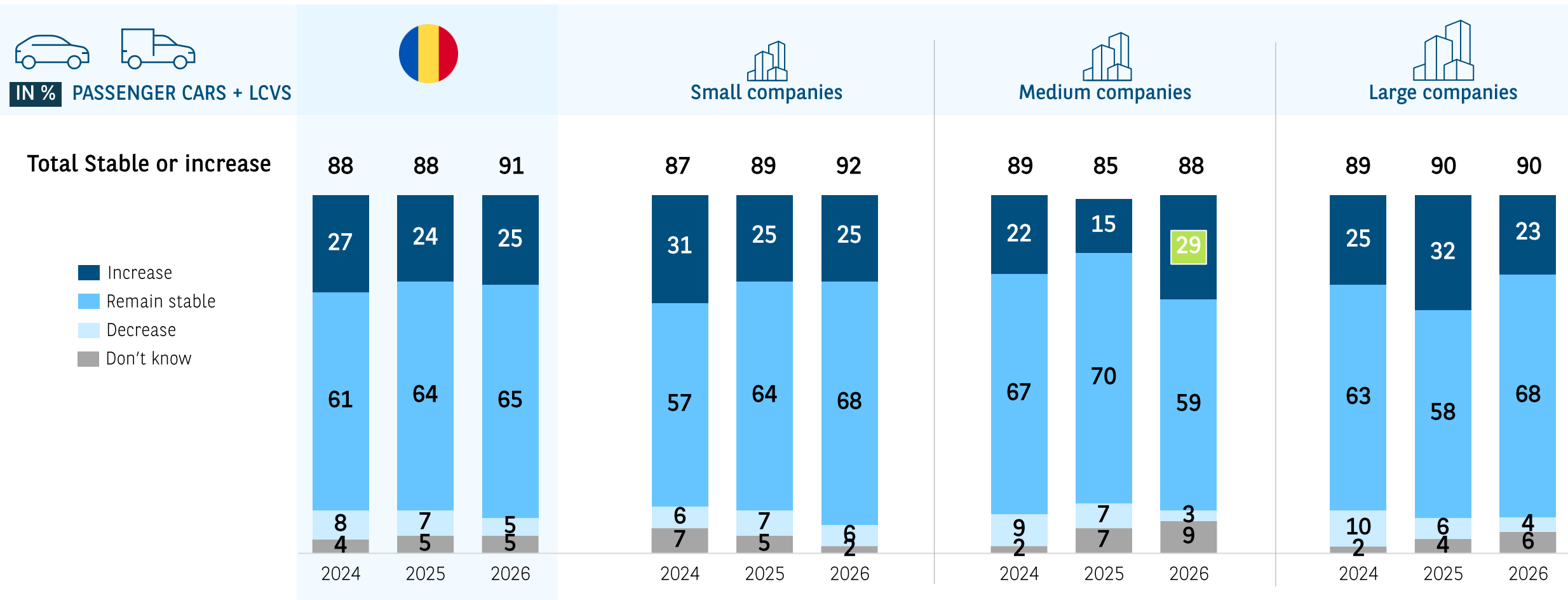


A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

HOW TO READ THE RESULTS ?

In Romania in 2026, 91% of the companies expect their fleet to remain stable or to increase in the next 3 years.



A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Romania in 2026, 91% of the companies expect their fleet to remain stable or to increase in the next 3 years.

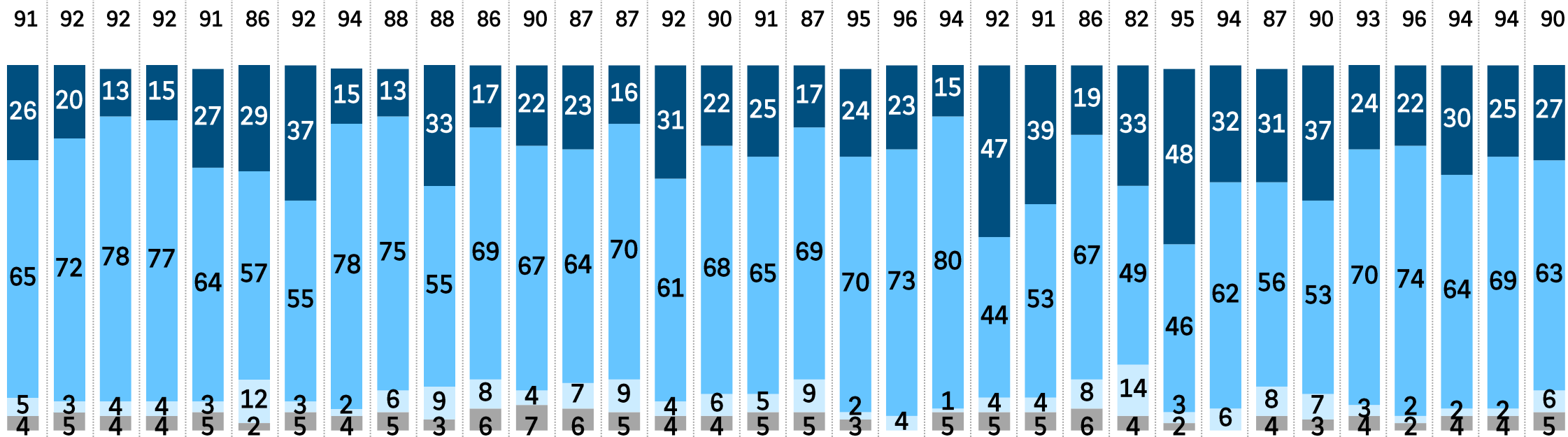


IN % PC + LCVS

- W
- AT
- CH
- DE
- ES
- FR
- GR
- IT
- PT
- UK
- BE
- LU
- NL
- CZ
- PL
- SK
- RO
- DK
- FI
- NO
- SE
- MA
- TR
- BR
- CL
- PE
- US
- CA
- MX
- AU
- NZ
- IN
- ID
- TH

Total Stable or increase

- Increase
- Remain stable
- Decrease
- Don't know



A8. In the next three years, do you think that the total number of vehicles in your company fleet will increase, decrease or remain the same?

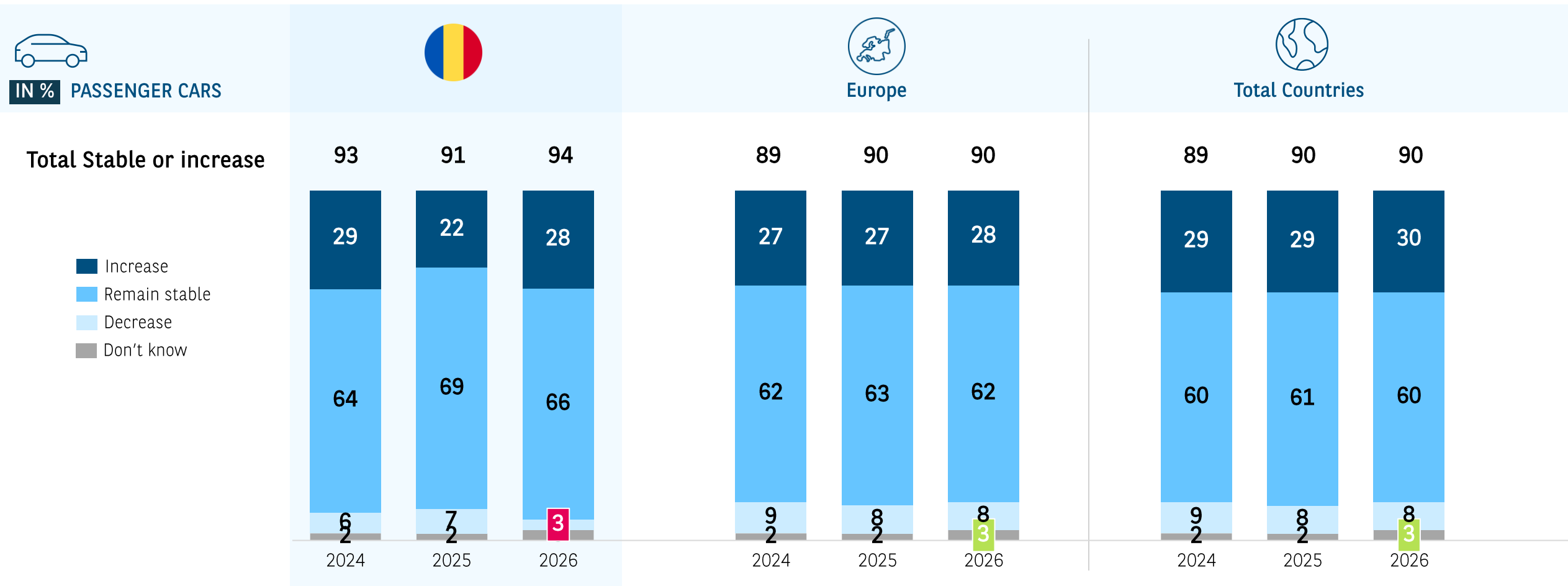
Basis: companies with corporate vehicles = 100%



PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Romania in 2026, 94% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



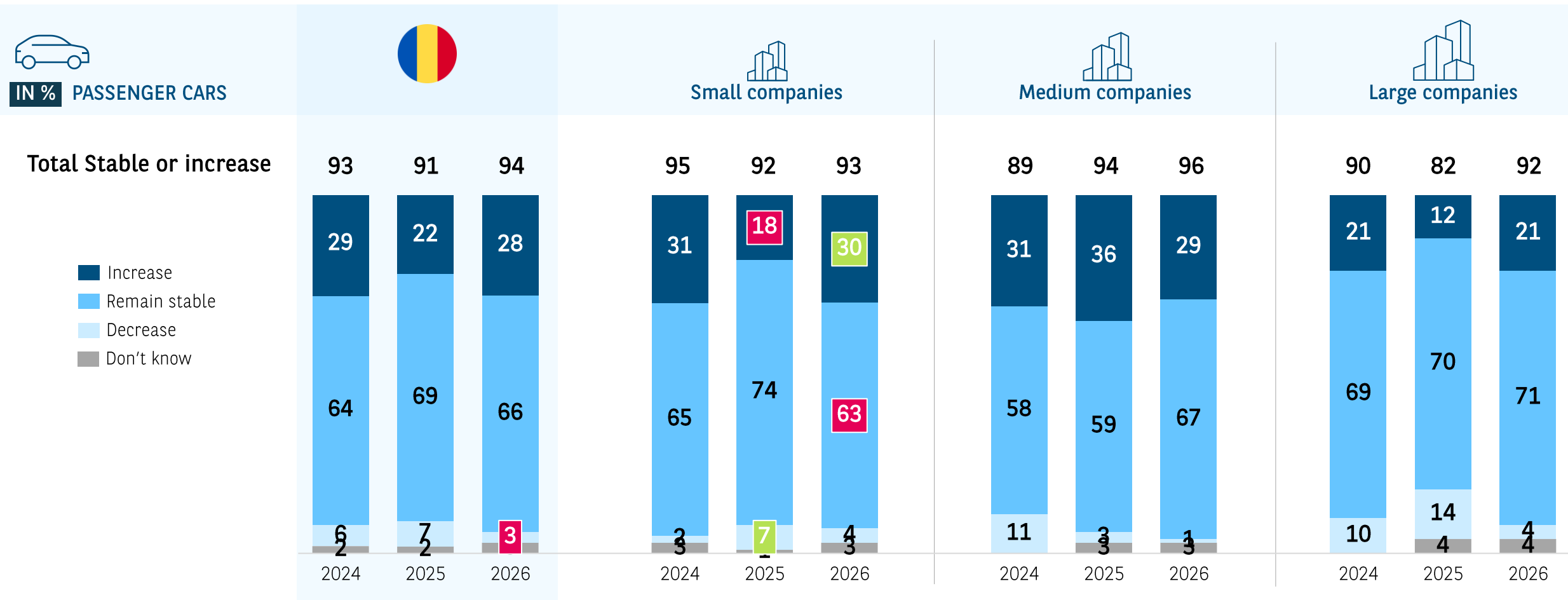
A9. In the next three years, do you think that the total number of your passenger cars will...?
 Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Romania in 2026, 94% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



A9. In the next three years, do you think that the total number of your passenger cars will...?
Basis: companies with passenger cars

X% Significantly higher/lower vs. previous wave

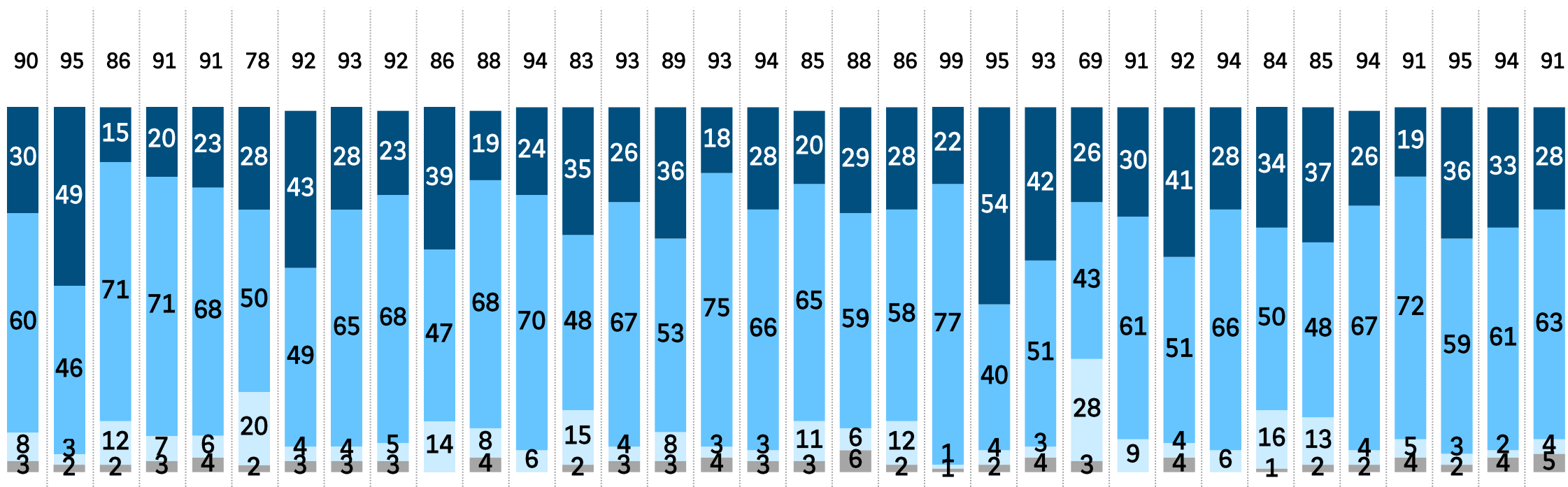
PASSENGER CAR FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Romania in 2026, 94% of the companies expect their passenger car fleet to remain stable or to increase in the next 3 years.



IN % PC



A9. In the next three years, do you think that the total number of your passenger cars will...?

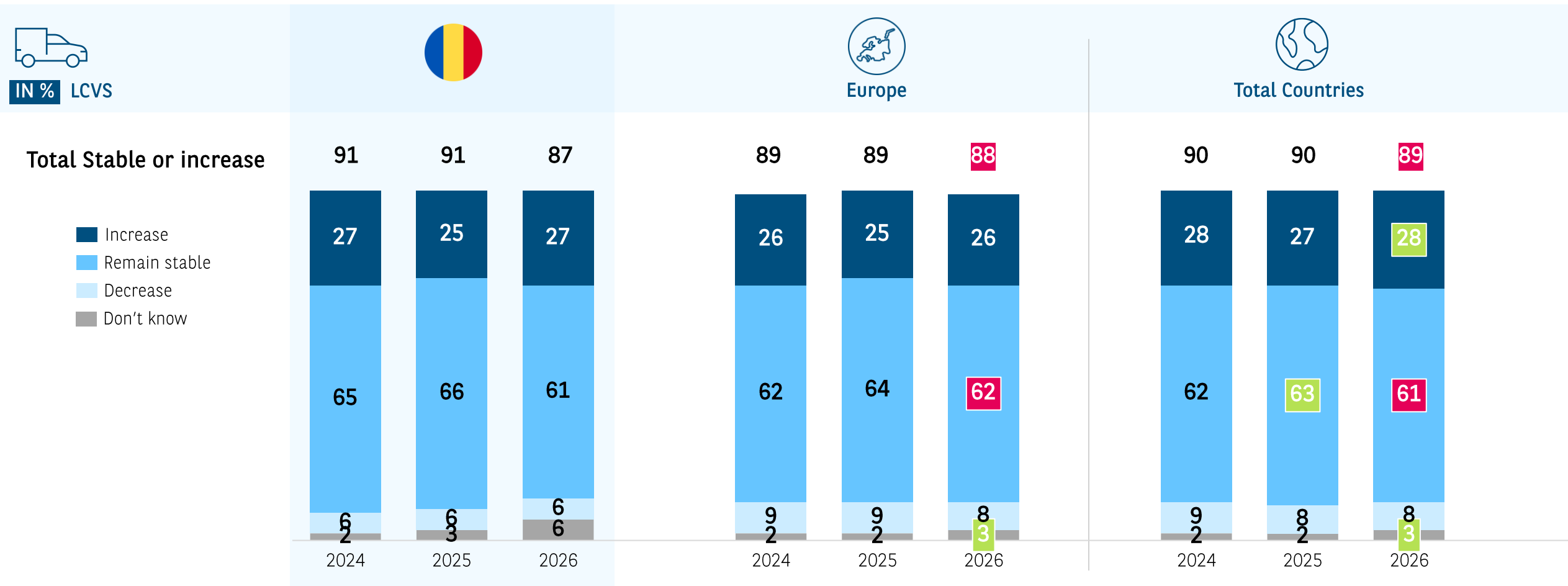
Basis: companies with passenger cars



LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Romania in 2026, 87% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



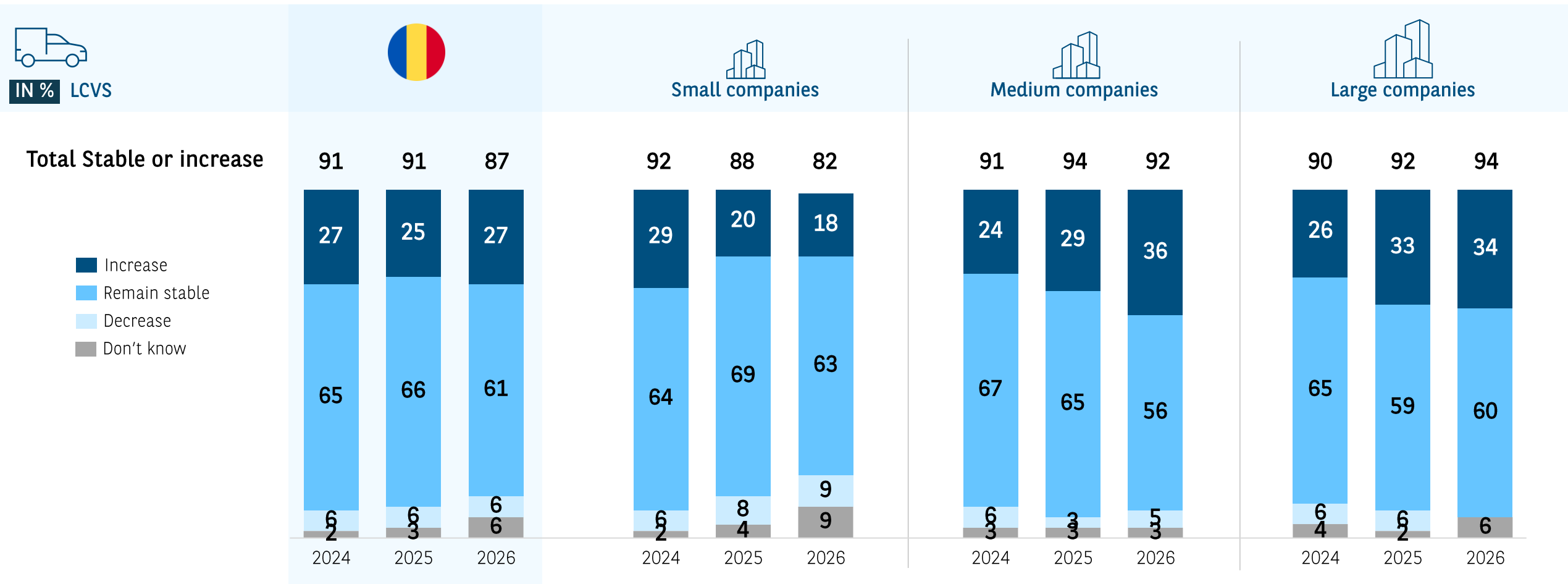
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Romania in 2026, 87% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.



A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs

X% Significantly higher / lower vs. previous wave

LCV FLEET GROWTH POTENTIAL

HOW TO READ THE RESULTS ?

In Romania in 2026, 87% of the companies expect their LCV fleet to remain stable or to increase in the next 3 years.

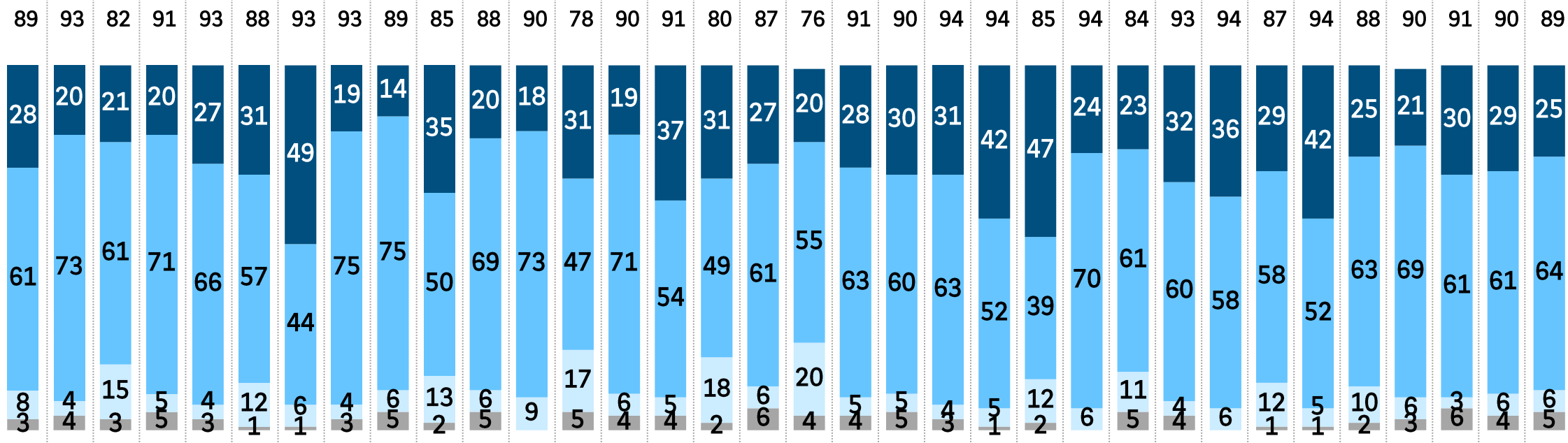


IN % LCVS



Total Stable or increase

- Increase
- Remain stable
- Decrease
- Don't know



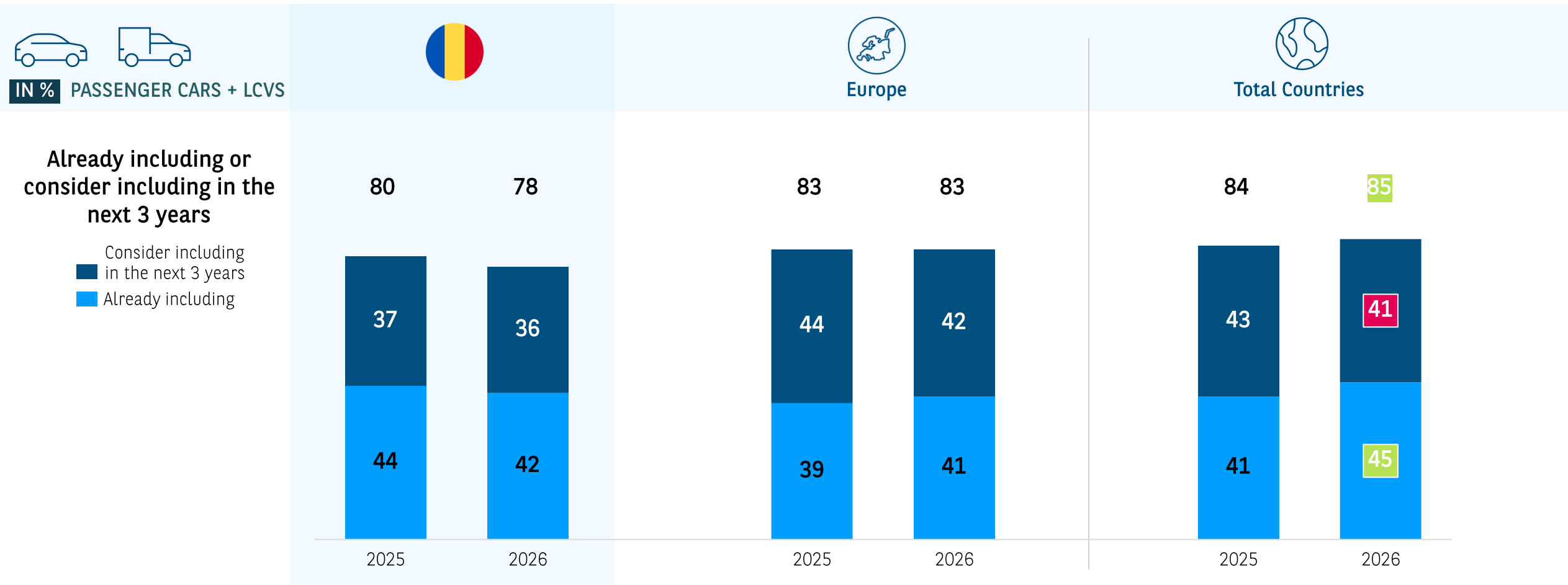
A10. In the next three years, do you think that the total number of your light commercial vehicles or vans will...?
Basis: companies with LCVs



USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Romania in 2026, 78% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



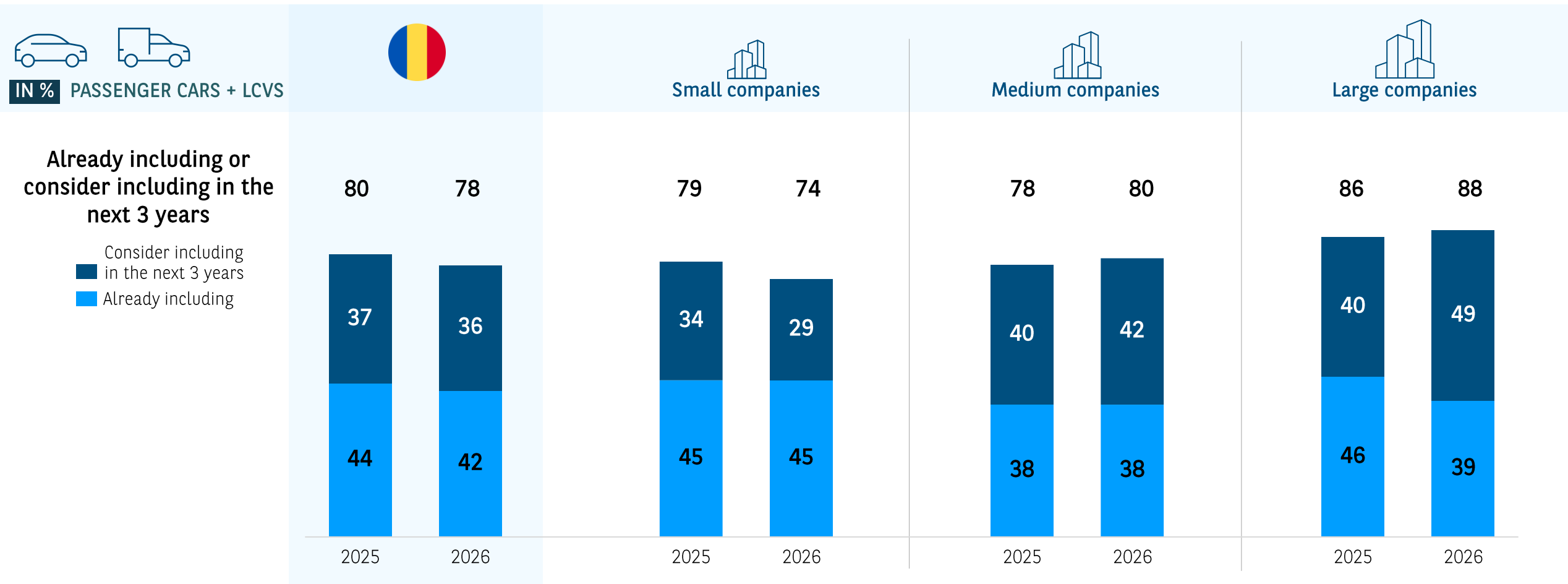
A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Romania in 2026, 78% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



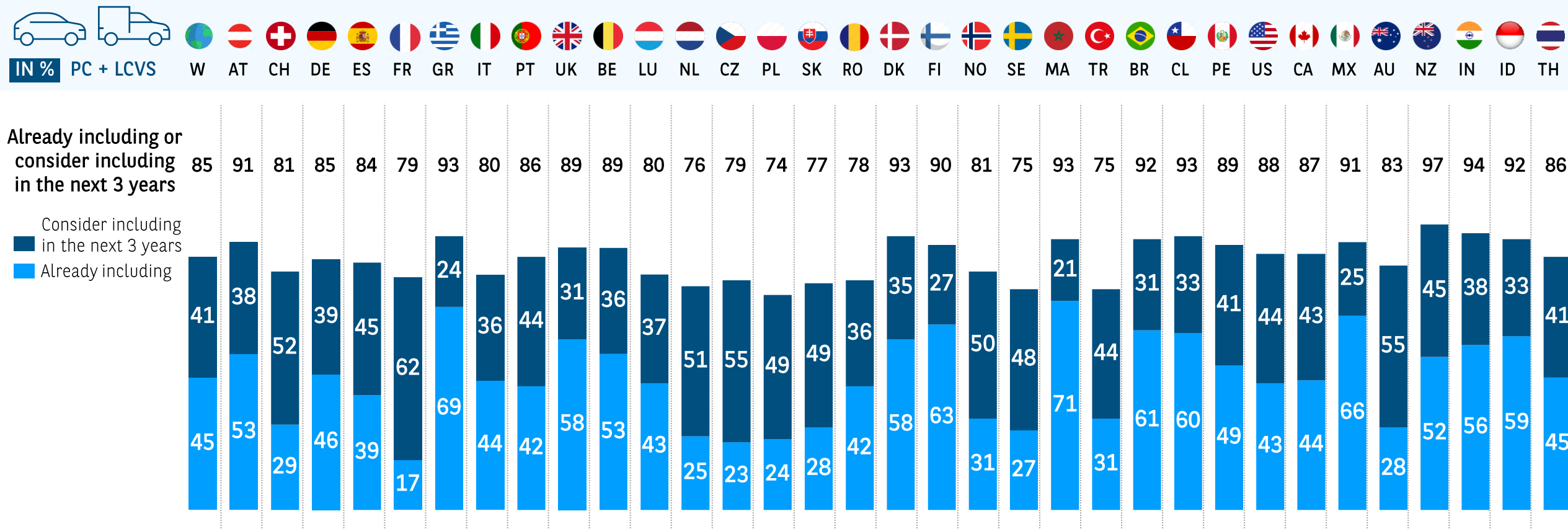
A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher/lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Romania in 2026, 78% of the companies are already including vehicles that were not new when acquired or are considering doing so in the next 3 years.



A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?

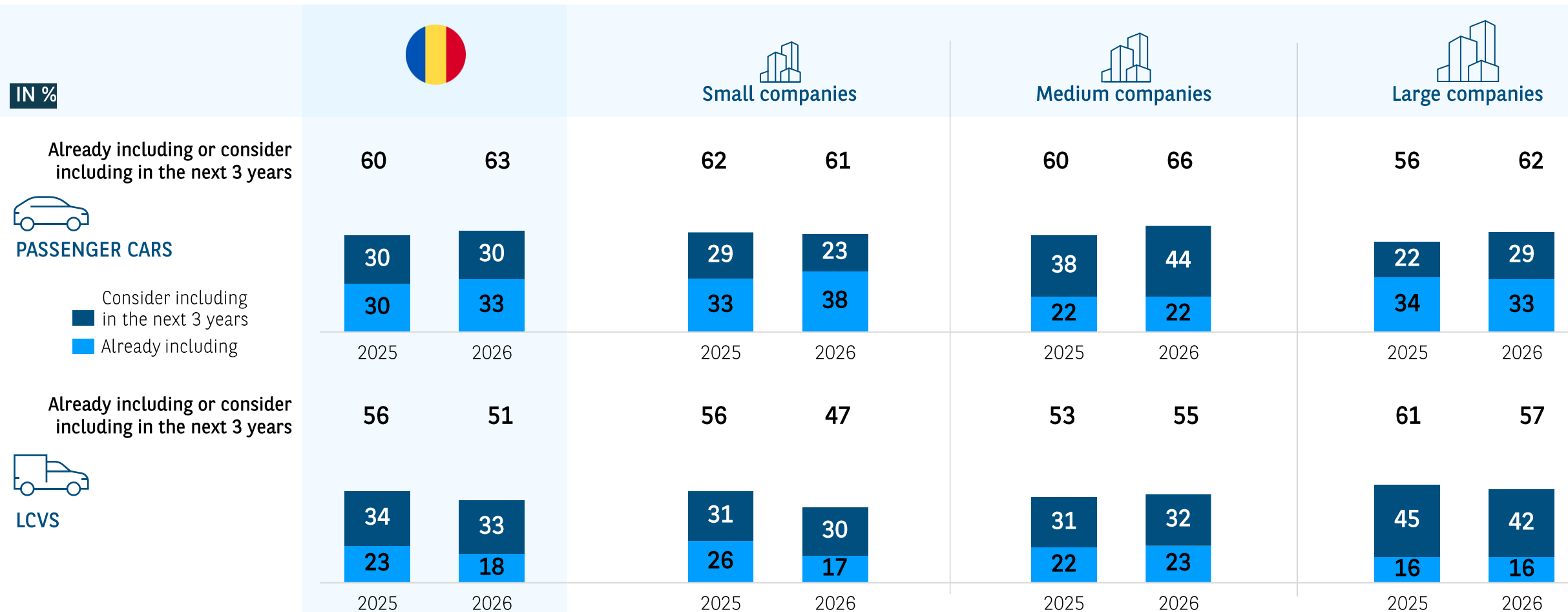
Basis: companies with corporate vehicles = 100%



USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Romania in 2026, 63% of the companies are already including or are considering including passenger cars that were not new when acquired. 51% of the companies are already including or are considering including LCVs that were not new when acquired.



A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?
 Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

USED / SECOND-HAND VEHICLES POSSESSION

HOW TO READ THE RESULTS ?

In Romania in 2026, 63% of the companies are already including or are considering including passenger cars that were not new when acquired. 51% of the companies are already including or are considering including LCVs that were not new when acquired.

IN %

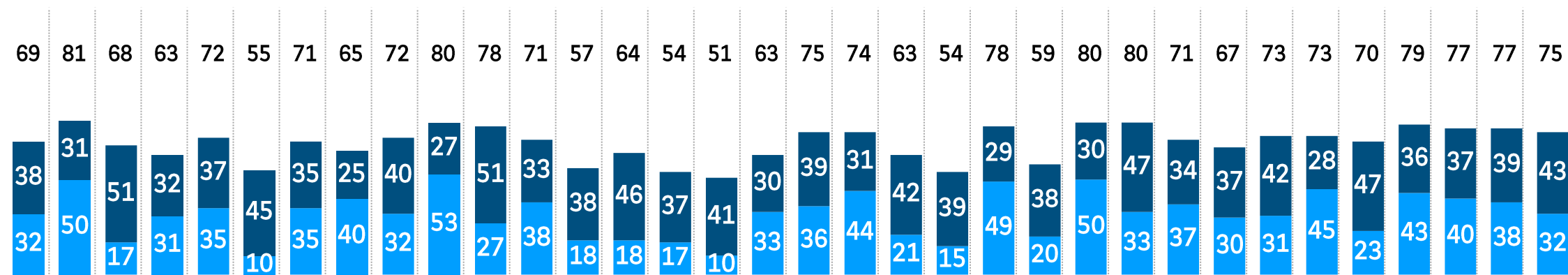


Already including or consider including in the next 3 years

PASSENGER CARS

Consider including in the next 3 years

Already including

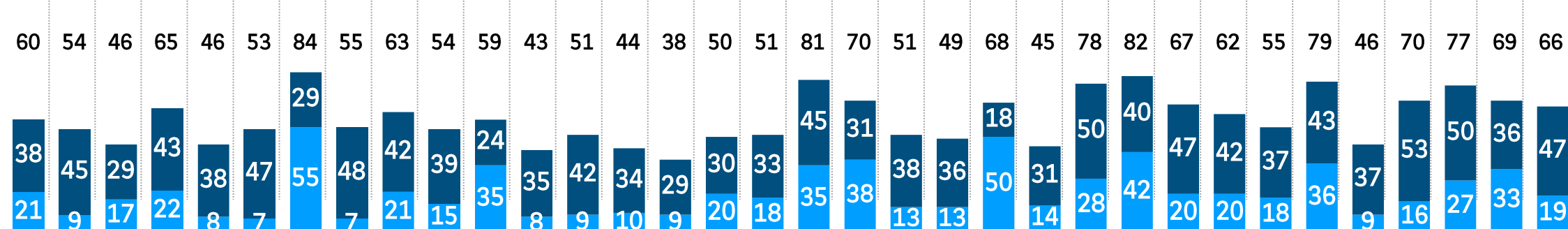


Already including or consider including in the next 3 years

LCVS

Consider including in the next 3 years

Already including



A14. Does your fleet include vehicles that were not new when you acquired them, or do you consider including some in the next 3 years?

Basis: companies with corporate vehicles = 100%



02

FINANCING METHODS

How do companies finance their fleets?



Operational/full-service leasing remains significantly less common than financial leasing and outright/direct purchase as the main financing method among companies in Romania

Currently, 14% of Romanian companies use Operational leasing as the main financing method for their fleets, a stable figure that is consistent across company sizes and lower than the European average of 28%.

Financial leasing is the predominant financing method, employed by 47% of companies, followed by Outright/direct purchase, used by 36%.

A similar use of the operational/full-service leasing for second-hand vehicles

Among Romanian companies using or considering second-hand vehicles, 19% use Operational leasing as their main financing method, or plan to do so if considering second-hand vehicles, below the European average of 28%.

The growth potential for operational leasing remains stable and promising

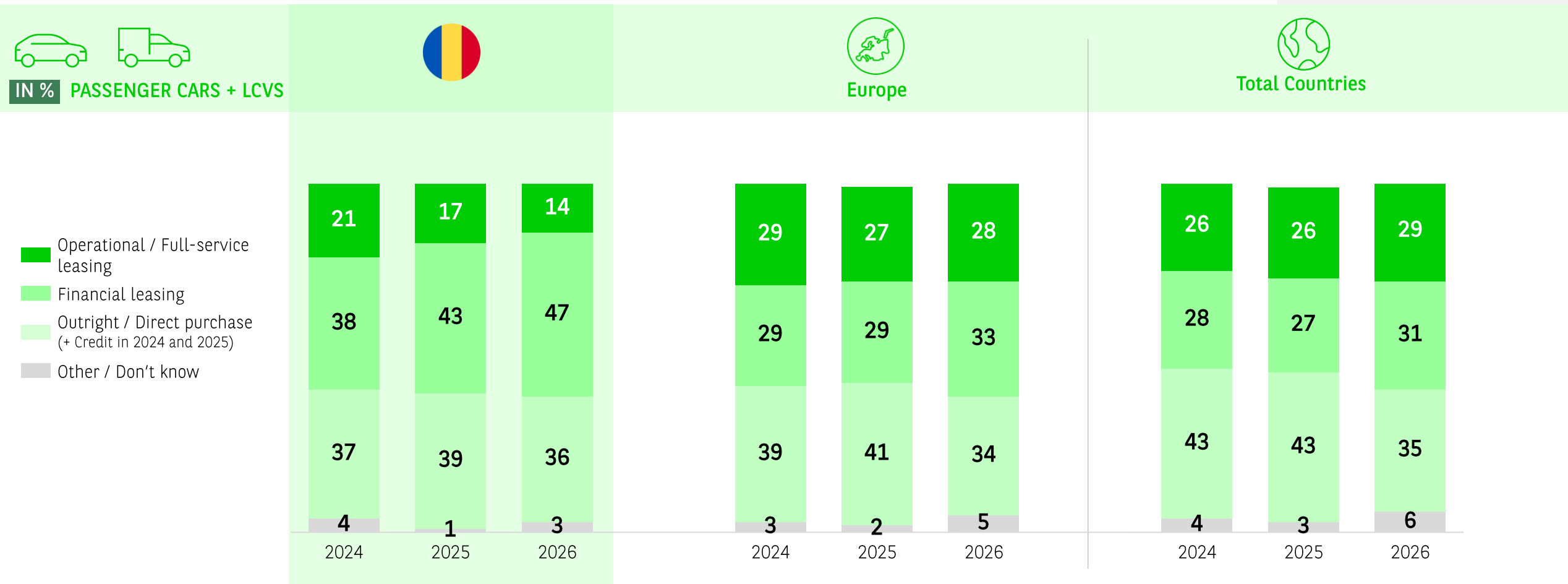
In 2026, 49% of Romanian companies intend to introduce or increase their use of operational leasing for fleet financing, up from 42% in 2024 and exceeding the European average of 36%. This growth potential is driven by small companies (54%) and medium-sized companies (48%), rather than large companies (37%)

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In Romania in 2026, 14% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

Item "Credit" deleted in 2026 – No comparison versus last waves



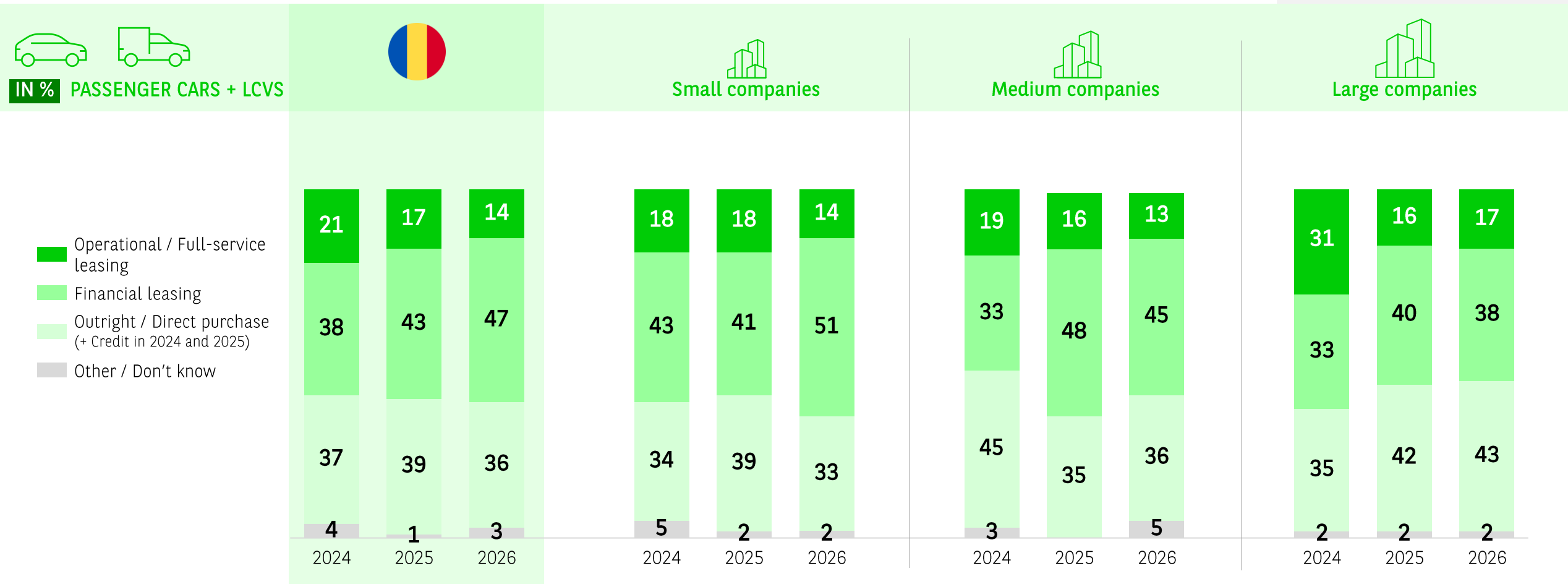
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In Romania in 2026, 14% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

Item "Credit" deleted in 2026 - No comparison versus last waves



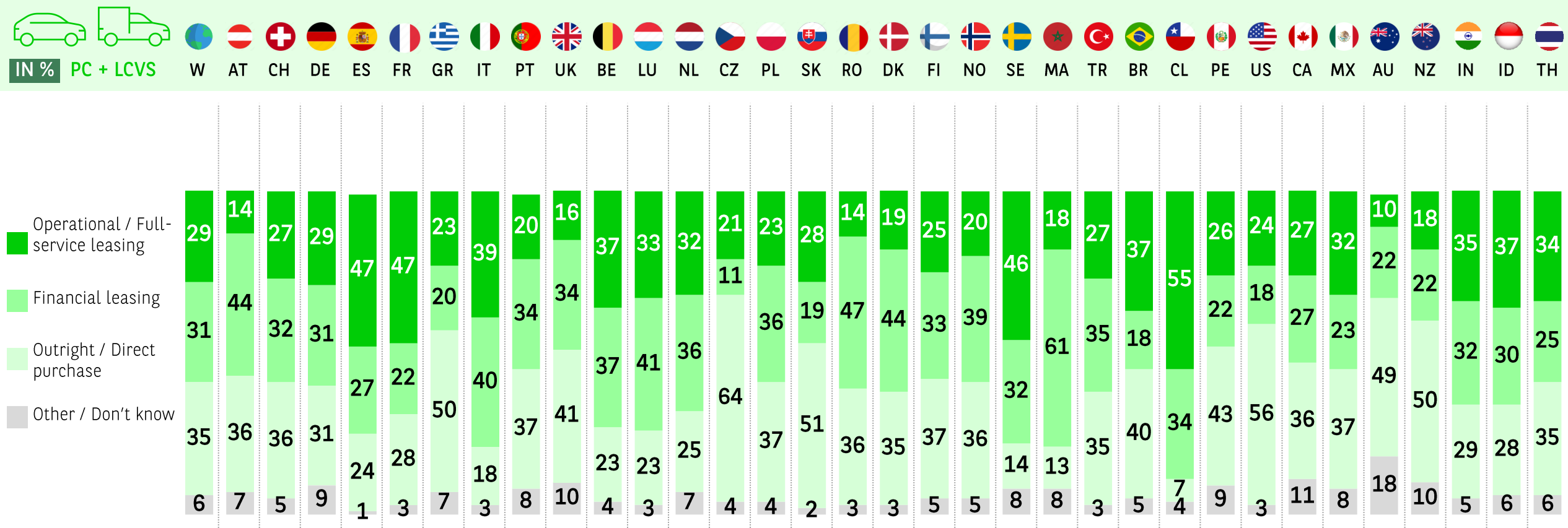
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN FLEET FINANCING METHOD

HOW TO READ THE RESULTS ?

In Romania in 2026, 14% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their company vehicles.

Item "Credit" deleted in 2026



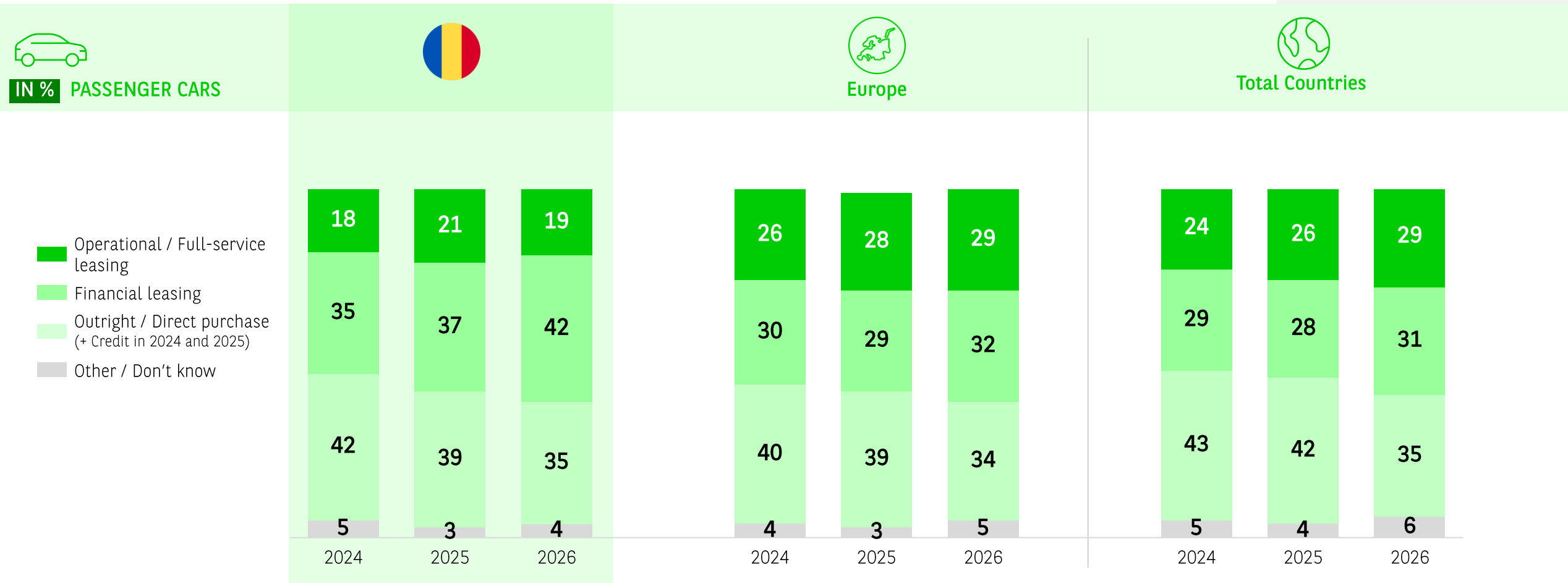
B2. What is the main method used to finance your company vehicles today?
Basis: companies with corporate vehicles = 100%

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Romania in 2026, 19% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

Item "Credit" deleted in 2026 - No comparison versus last waves



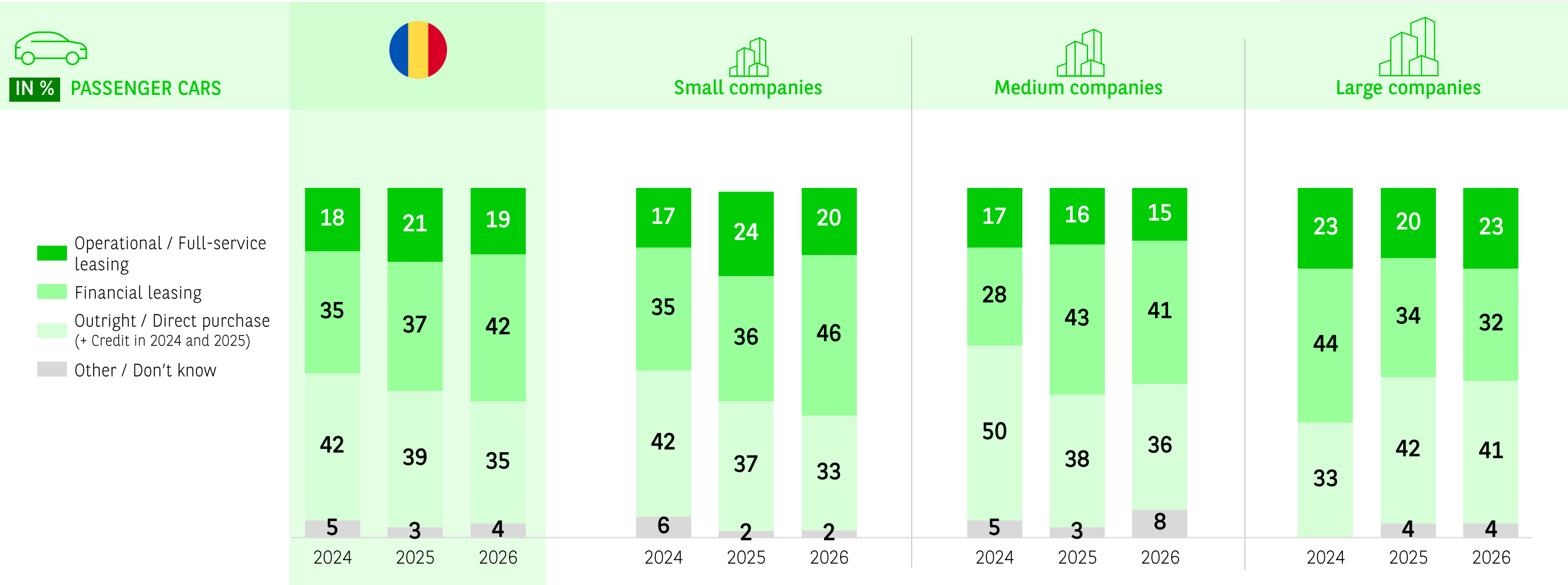
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Romania in 2026, 19% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

Item "Credit" deleted in 2026 - No comparison versus last waves



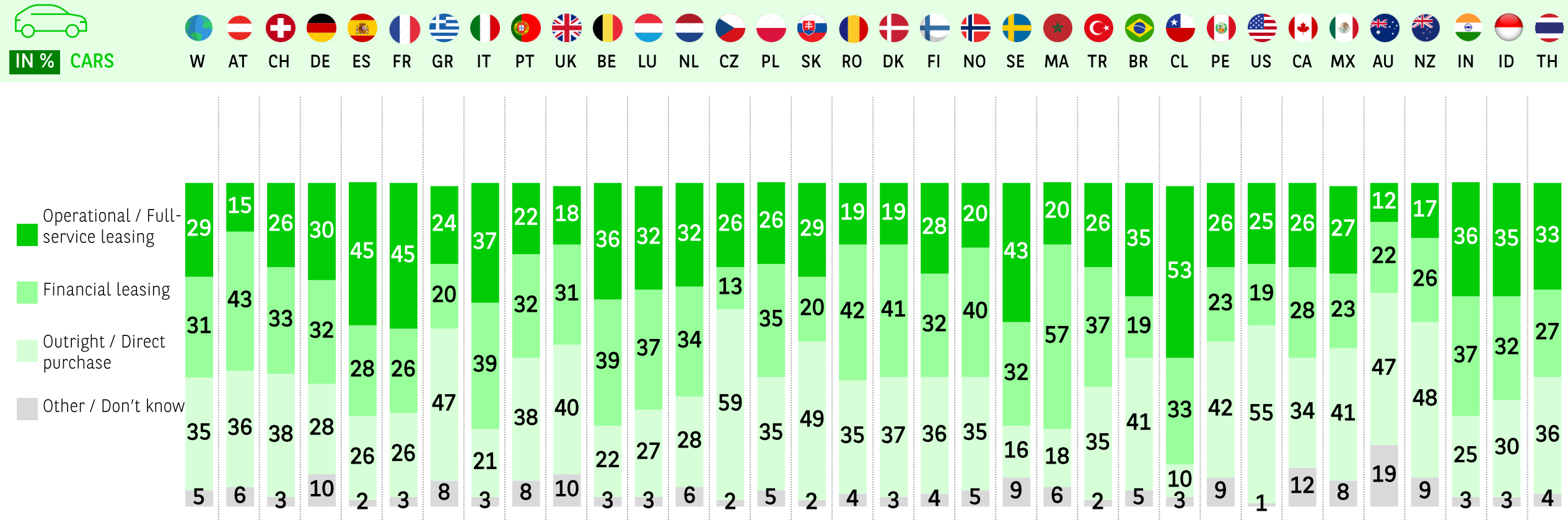
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN PASSENGER CARS FINANCING METHOD

HOW TO READ THE RESULTS ?

In Romania in 2026, 19% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their passenger cars.

Item "Credit" deleted in 2026



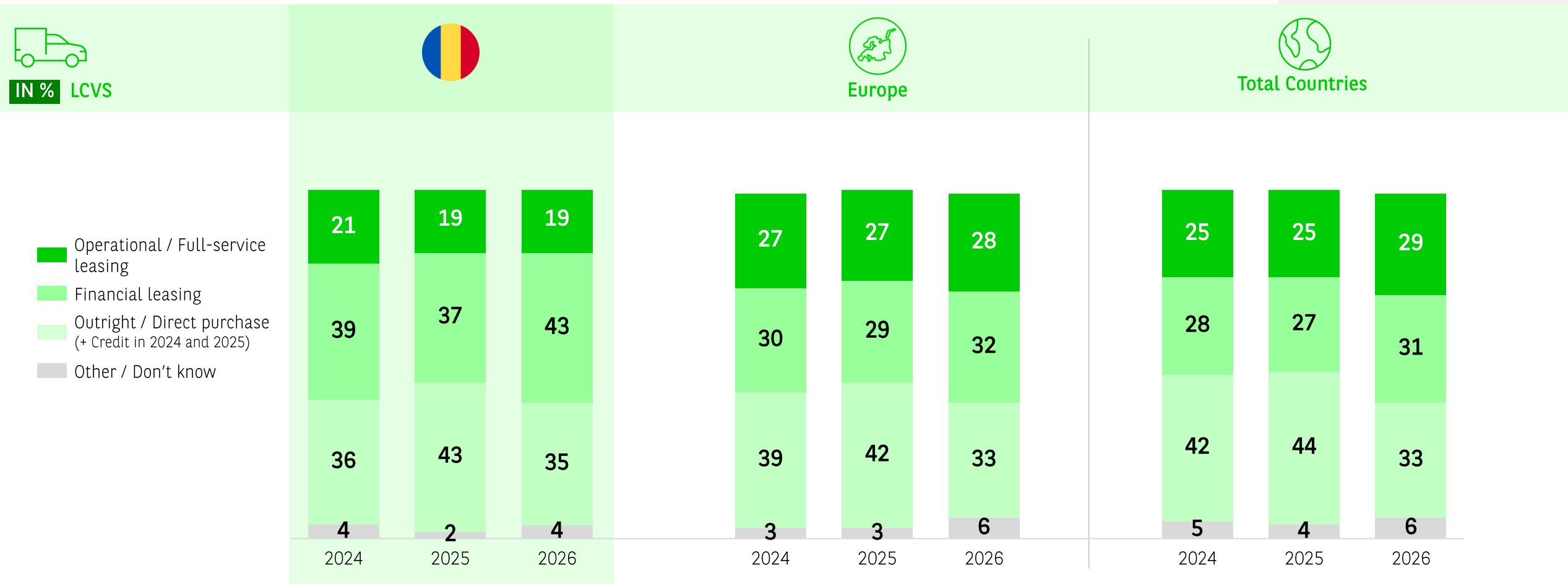
B3. And what is the main method used to finance your passenger cars today?
Basis: companies with passenger cars

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In Romania in 2026, 19% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

Item "Credit" deleted in 2026 - No comparison versus last waves



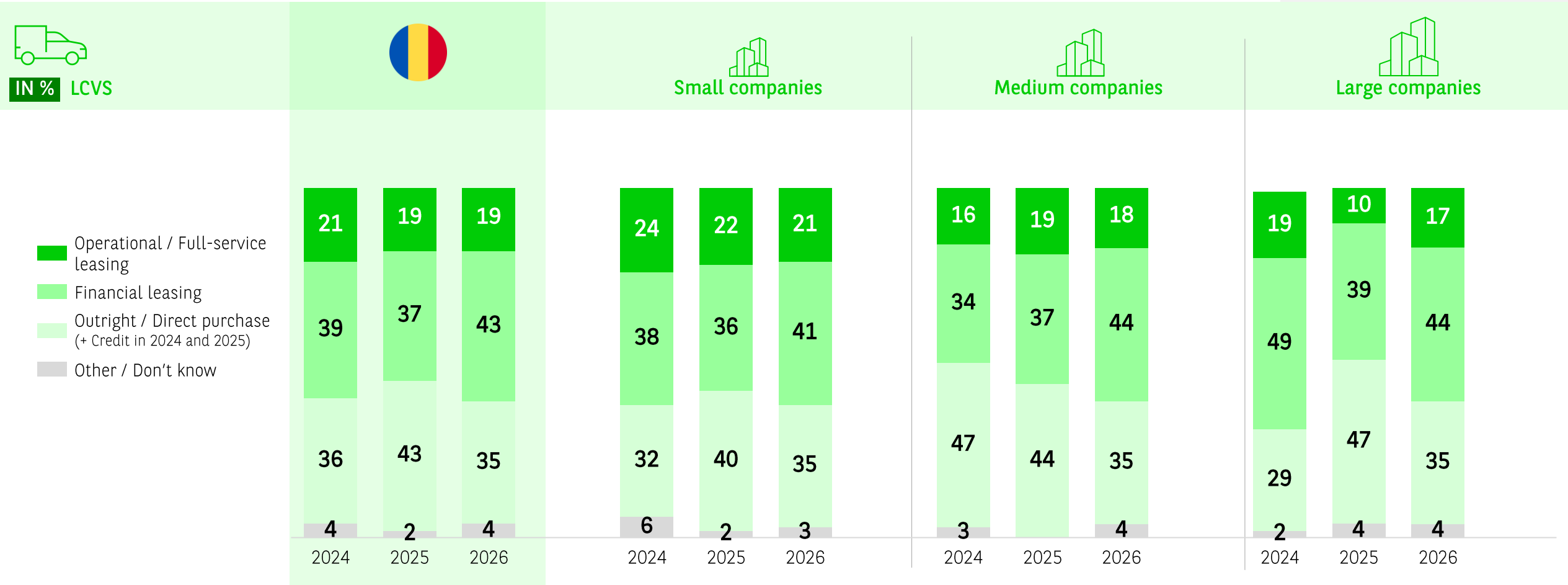
B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

MAIN LCV FINANCING METHOD

HOW TO READ THE RESULTS ?

In Romania in 2026, 19% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

Item "Credit" deleted in 2026 - No comparison versus last waves



B4. And what is the main method used to finance your light commercial vehicles or vans today?
Basis: companies with LCVs

MAIN LCV FINANCING METHOD

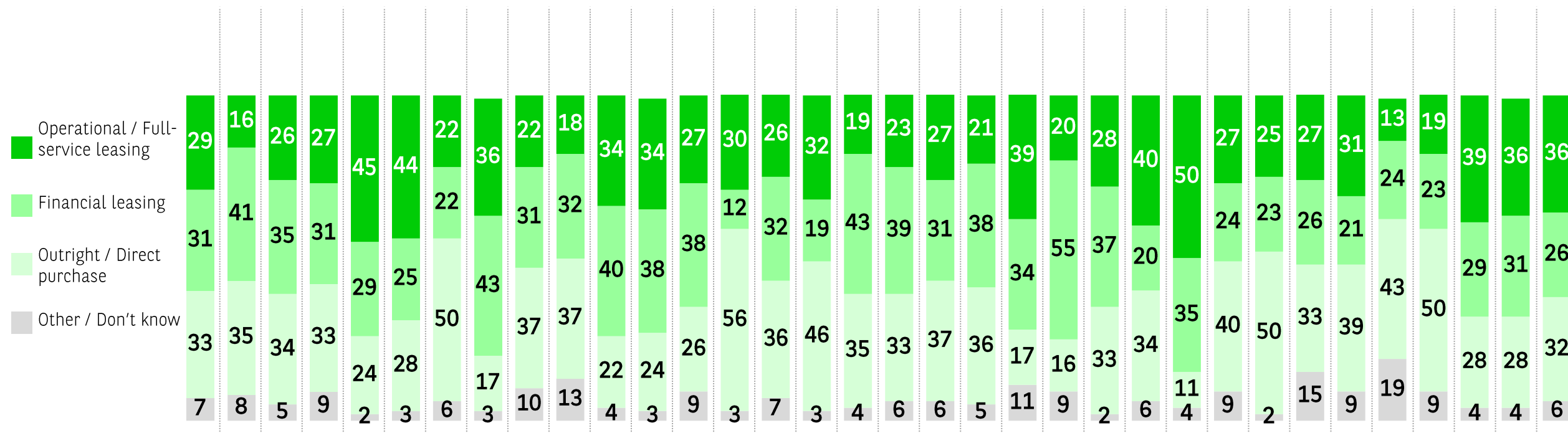
HOW TO READ THE RESULTS ?

In Romania in 2026, 19% of the companies are using Operational Leasing / Full-Service Leasing as main method to finance their LCVs.

Item "Credit" deleted in 2026



IN % LCVS



B4. And what is the main method used to finance your light commercial vehicles or vans today?

Basis: companies with LCVs

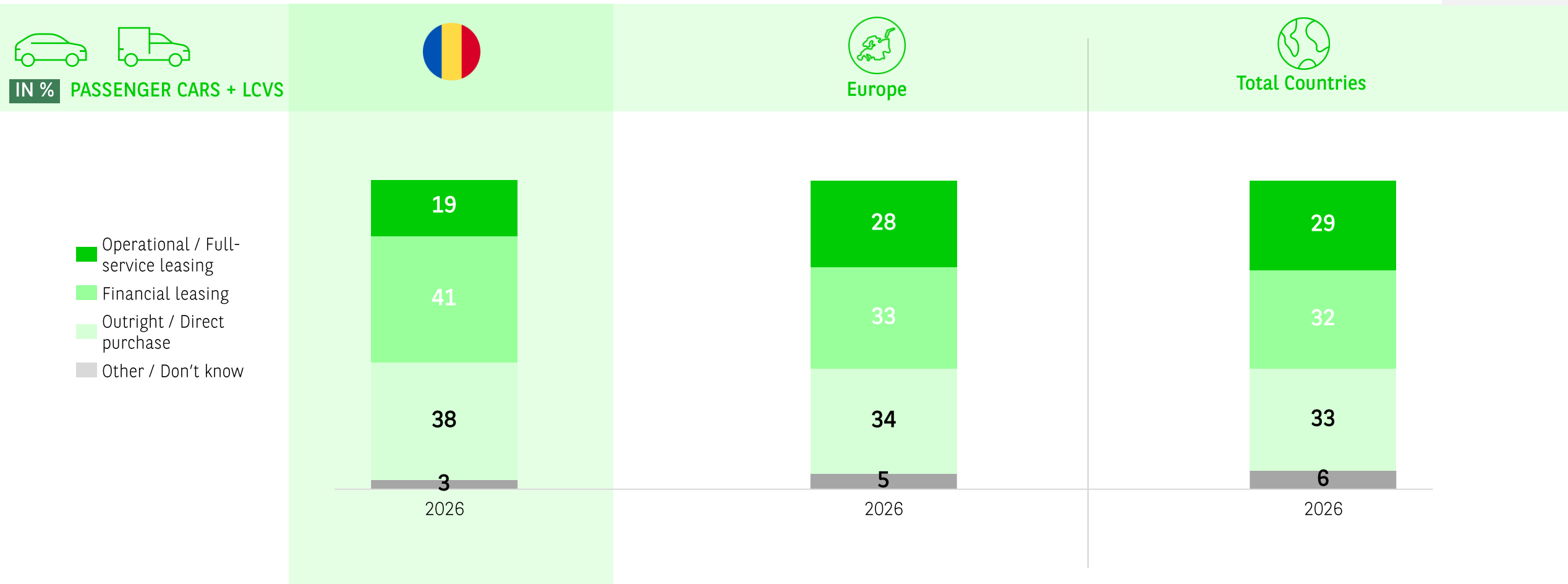


MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

In Romania in 2026, 19% of the companies considering or having second-hand vehicles are (plan on) using Operational Leasing / Full-Service Leasing as main method to finance their company second-hand vehicles.

New question



B5. What is the (planned) main method currently used to finance the second-hand vehicles in your fleet?
Basis: companies considering or having corporate second-hand vehicles"

MAIN FLEET FINANCING METHOD FOR SECOND-HAND VEHICLES

HOW TO READ THE RESULTS ?

In Romania in 2026, 19% of the companies considering or having second-hand vehicles are (plan on) using Operational Leasing / Full-Service Leasing as main method to finance their company second-hand vehicles.

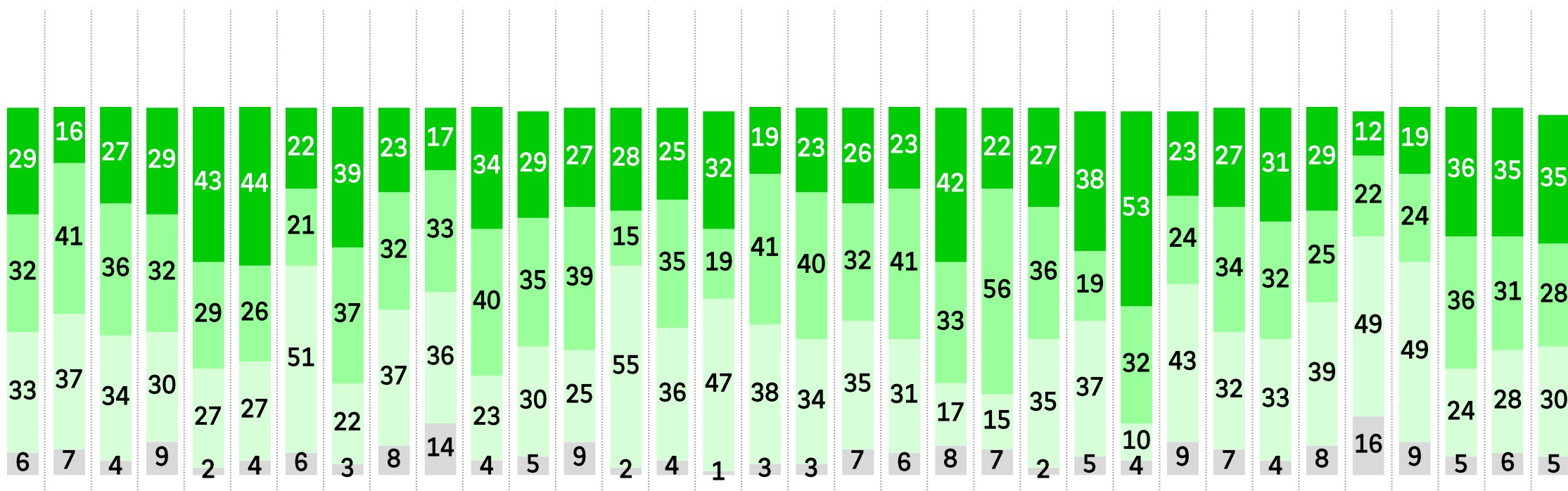
New question



IN % PC + LCVS

- W
- AT
- CH
- DE
- ES
- FR
- GR
- IT
- PT
- UK
- BE
- LU
- NL
- CZ
- PL
- SK
- RO
- DK
- FI
- NO
- SE
- MA
- TR
- BR
- CL
- PE
- US
- CA
- MX
- AU
- NZ
- IN
- ID
- TH

- Operational / Full-service leasing
- Financial leasing
- Outright / Direct purchase
- Other / Don't know



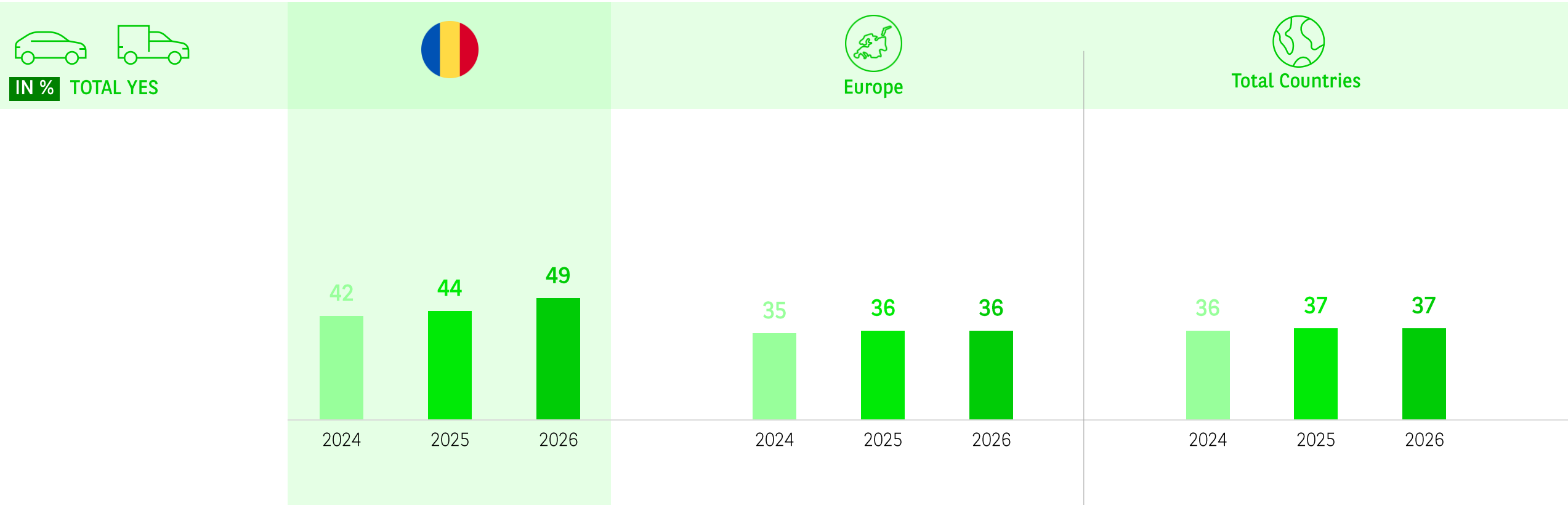
B5. What is the (planned) main method currently used to finance the second-hand vehicles in your fleet?
Basis: companies considering or having corporate second-hand vehicles"



INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In Romania in 2026, 49% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



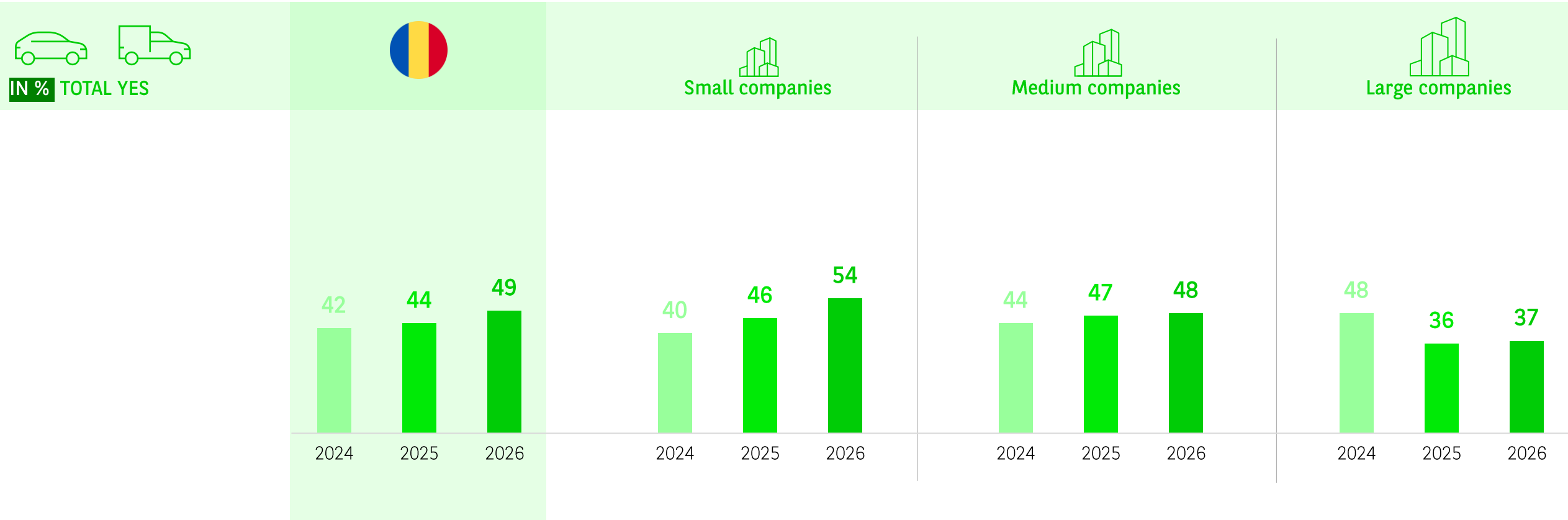
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In Romania in 2026, 49% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



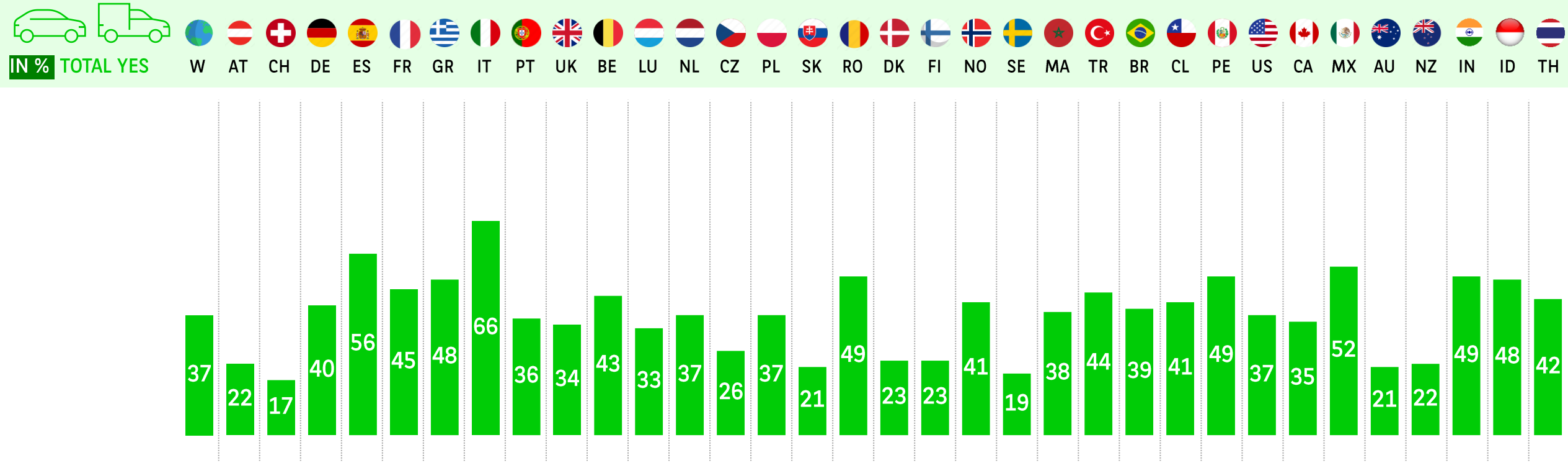
B8bis. In the next three years do you intend to either introduce or increase the use of Operational Leasing / Full-Service Leasing to finance your corporate fleet?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

INTENTION TO INTRODUCE OR INCREASE THE USE OF OPERATIONAL LEASING

HOW TO READ THE RESULTS ?

In Romania in 2026, 49% of the companies intend to introduce or increase the use of Operational Leasing / Full-Service Leasing to finance their corporate fleet in the next three years.



B8bis. In the next three years do you intend to either introduce or increase the use of Operational leasing / Full-Service Leasing to finance your corporate fleet?

Basis: companies with corporate vehicles = 100%



03

ENERGY MIX

What energy technologies are used?
What changes are to be expected in the near future?



Passenger car fleet electrification remains stable in Romania

24% of companies in Romania have implemented at least one type of electrified technology (HEV, PHEV or BEV) for passenger cars. This trend is stable, below the European average of 57%. When considering plans for adoption, this figure rises to 38%, vs. 19% for Europe. These figures are rather consistent across company sizes.

Hybrids remain the preferred technology for the passenger cars fleets' transition in Romania

In 2026, 13% of Romanian companies are equipped with PHEVs, 12% with HEVs and 4% with BEVs, maintaining stable levels compared to 2025. PHEVs are the most considered (26%), followed by HEVs (20%) and BEVs (17%).

Romanian companies continue to embrace electrification to anticipate future restrictive policies

In 2026, 49% of Romanian companies are transitioning to electrified technologies for this reason, a percentage higher than the European average of 27%, and up from 35% in 2024.

The ability to drive in Low Emission Zones (39%) and the lower environmental impact (39%) are also significant motivations for adopting electrification.

The electrification for LCVs remains confidential

4% of companies in Romania have adopted BEVs for their LCV fleets, slightly below the European average of 9%. 10% are considering this adoption. These figures are stable compared to 2025.

The lack of infrastructure, higher than the European average, remains the top barrier to electrification

The main constraint to broader EV adoption for passenger cars remains the lack of charging points, whether on streets, at home, or in corporate settings, as reported by 80% of Romanian companies - a level higher than the European average of 68%.

On-site charging and home-charging support remain priorities

In 2026, charging at the company premises is currently or will be a part of the charging policy for 81% of fleets in Romania (passenger cars or LCVs), aligning with the European trend. Among these fleets, 53% have already installed charging stations or plan to within the next year, aligning with the European average of 57%.

Public charging follows as the second most popular option, with 68% of companies considering this approach, vs. 66% for the European average. Among these, 56% reimburse energy costs through expense claims, while others provide energy cards to drivers.

Home charging remains the least common practice, adopted by only 23% of companies, like the rate in Europe (21%). Among these companies, 89% offer or plan to offer at least one charging solution to company car drivers, such as wallboxes (58%), reinforced sockets (43%), or smart cables (29%). Additionally, 94% provide financial support for home charging, with 62% offering partial coverage, another 23% offering full coverage, and 10% providing lump-sums. Furthermore, 39% fully reimburse energy costs, while 24% offer partial reimbursement.

A divided strategy regarding the 2030 regulations for BEVs

54% of the companies in Romania would take all necessary measures to comply with the regulations required to switch fleet of passenger company cars exclusively to BEVs by 2030 at the latest. 41% of the companies would transfer the choice of mobility means to their employees by offering them a mobility budget instead of a company car. And 6% of the companies would remove all mobility benefits from their compensation package, unless they are mandatory by law.

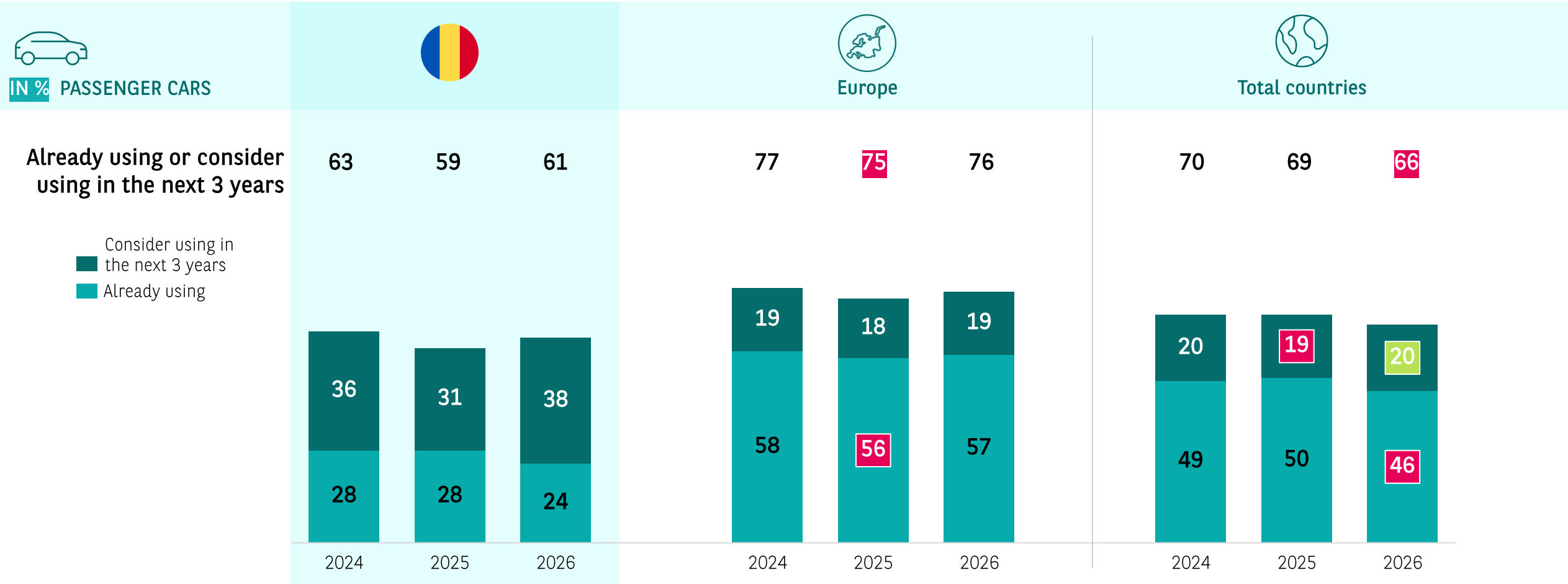
Leasing providers influence energy mix decisions

75% of Romanian companies using operational or financial leasing claim that their provider influences their energy mix choices.

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

In Romania in 2026, 61% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



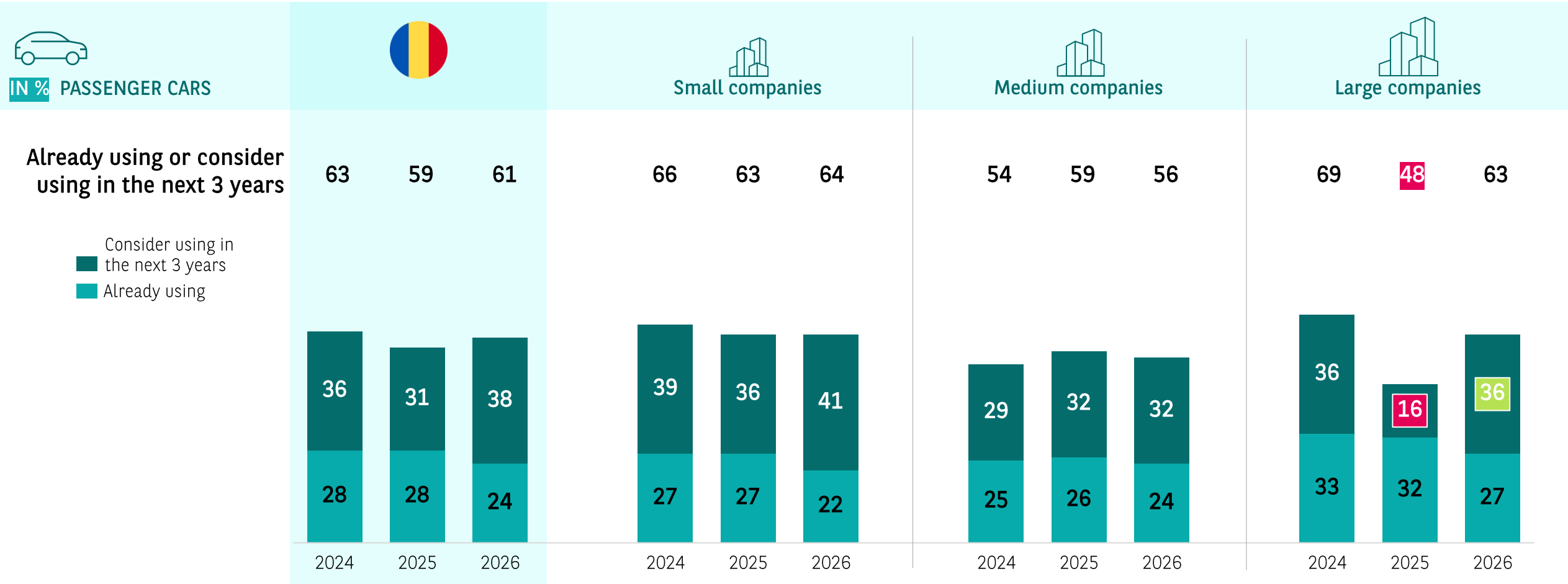
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? / E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...? Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

In Romania in 2026, 61% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? /
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE AT LEAST ONE TECHNOLOGY AMONG BEV, PHEV, HEV

HOW TO READ THE RESULTS ?

In Romania in 2026, 61% of the companies with passenger cars are already using at least one electrified vehicles technology among BEV, PHEV, HEV or are considering doing so in the next 3 years.

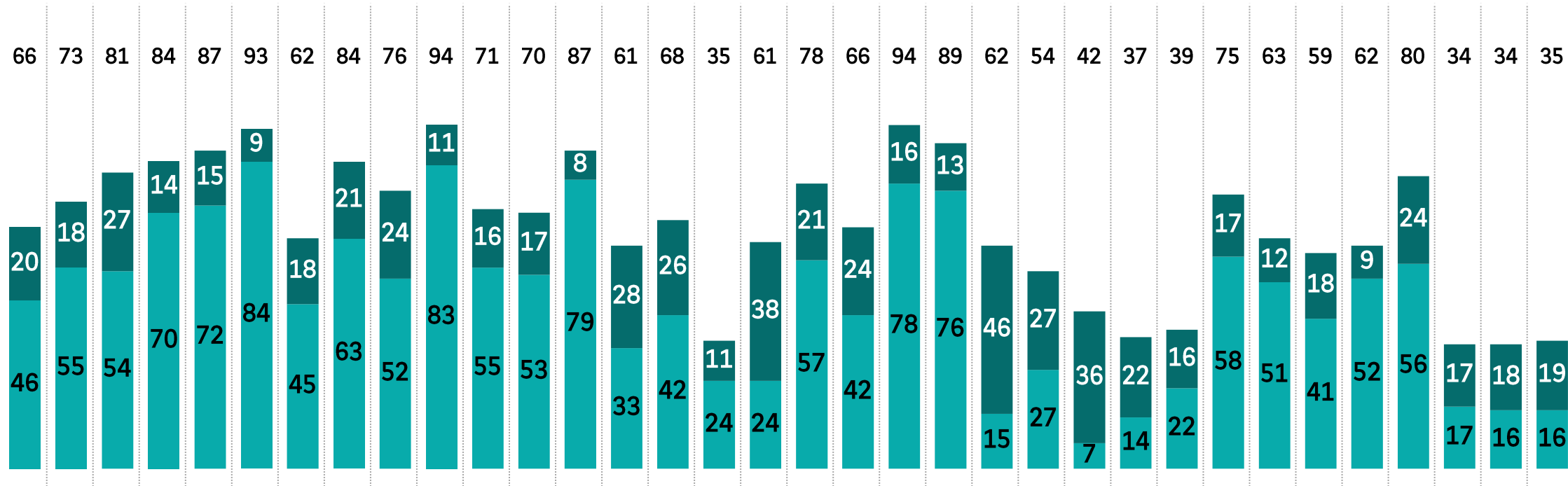


IN % PC



Already using or
consider in the
next 12 months

Consider using
Already using



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...? /
E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
Basis: companies with passenger cars

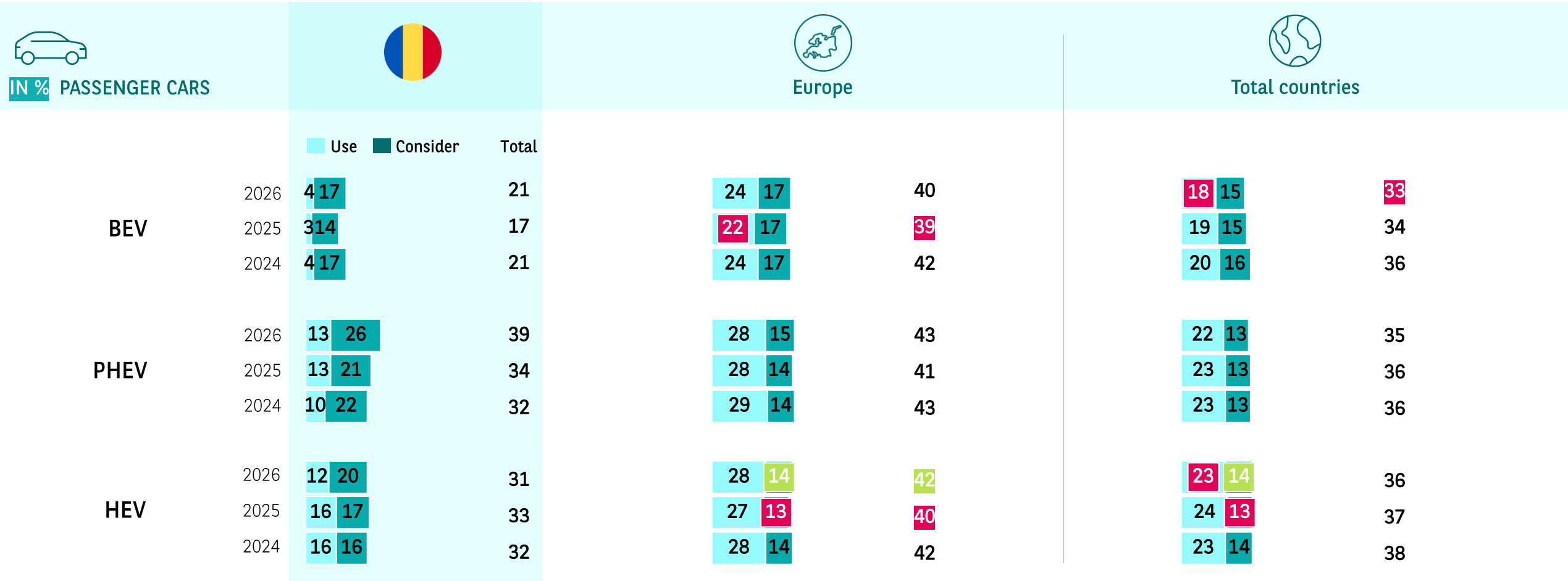


ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

DETAIL PER TECHNOLOGY

HOW TO READ THE RESULTS ?

In Romania in 2026, 21% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?

E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?

Basis: companies with passenger cars

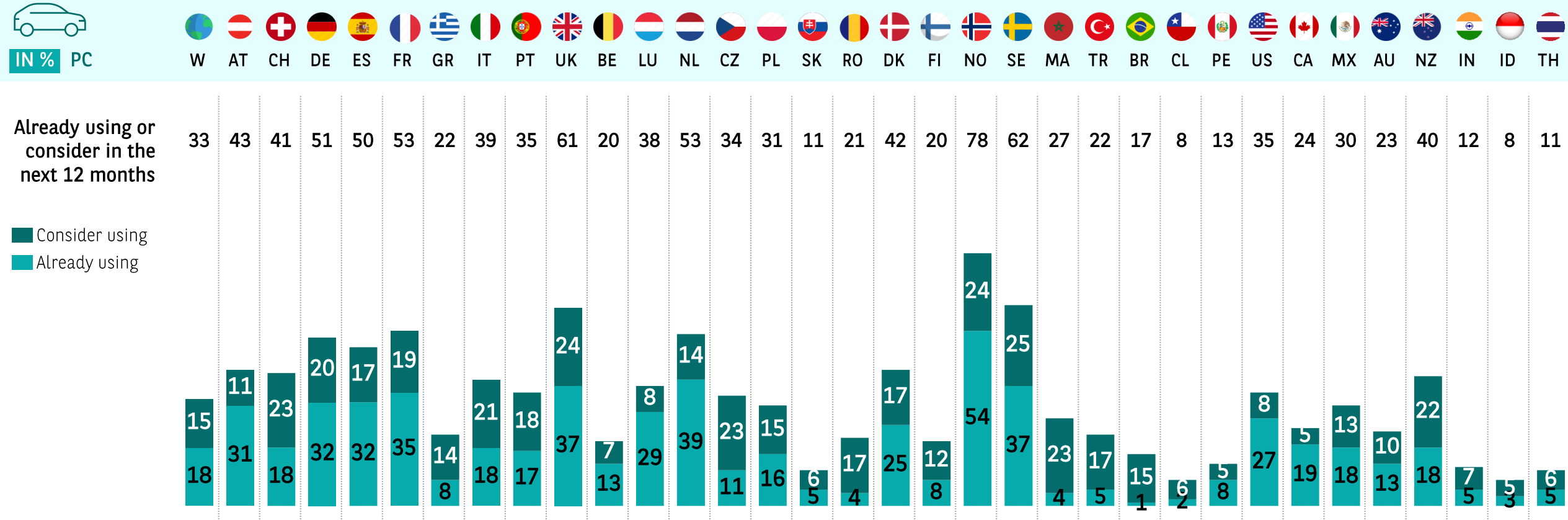
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Romania in 2026, 21% of the companies with passenger cars are already using BEV or are considering using it in the next three years.



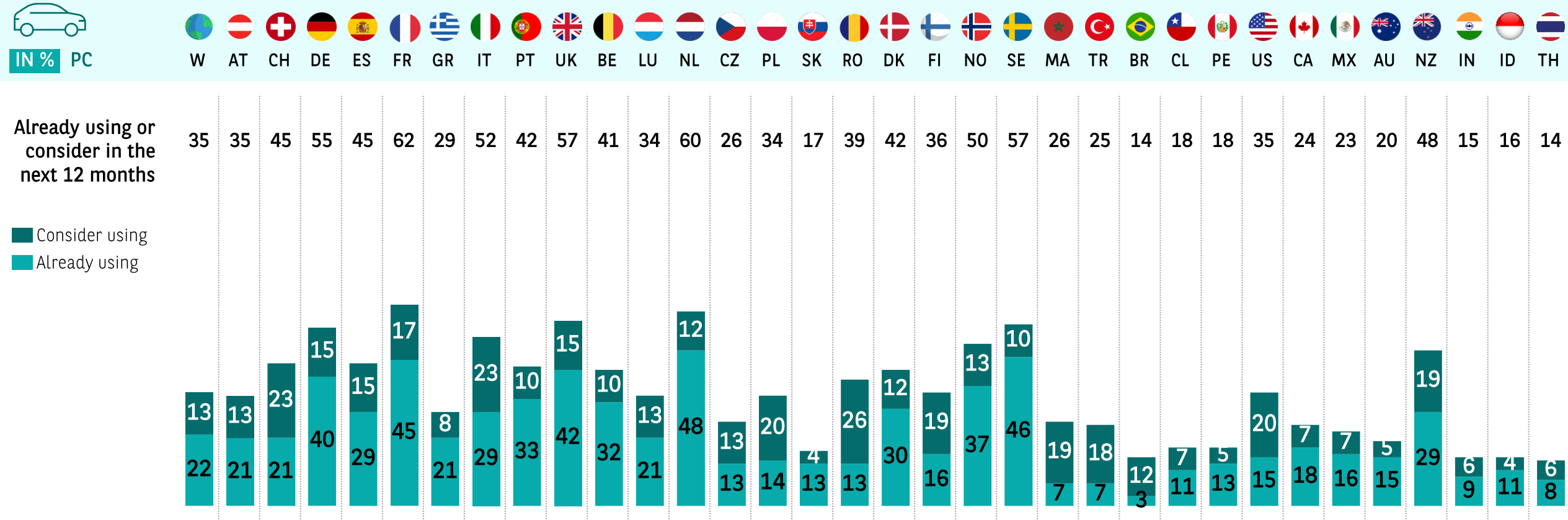
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON PHEV

HOW TO READ THE RESULTS ?

In Romania in 2026, 39% of the companies with passenger cars are already using PHEV or are considering using it in the next three years.



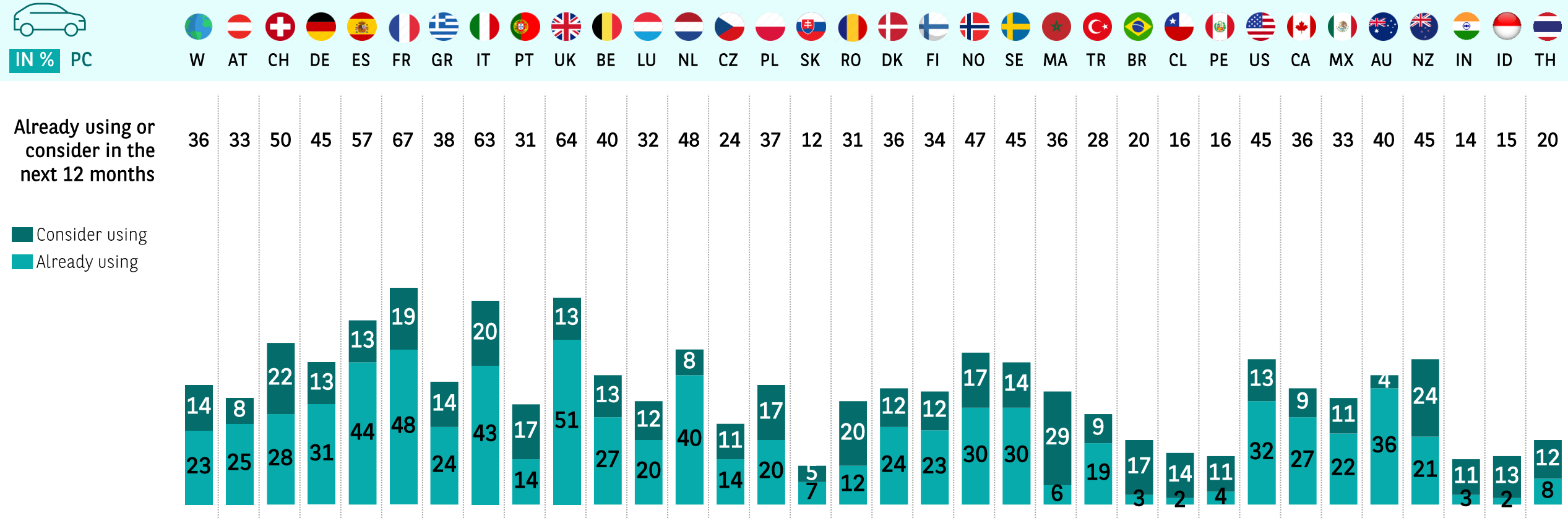
E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON HEV

HOW TO READ THE RESULTS ?

In Romania in 2026, 31% of the companies with passenger cars are already using HEV or are considering using it in the next three years.



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with passenger cars

REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

In Romania in 2026, 49% of the companies with passenger cars are already using electrified vehicles technologies or are considering it To anticipate future restrictive public policies (Low Emission Zones, Green Deal, quotas on EV, etc.).



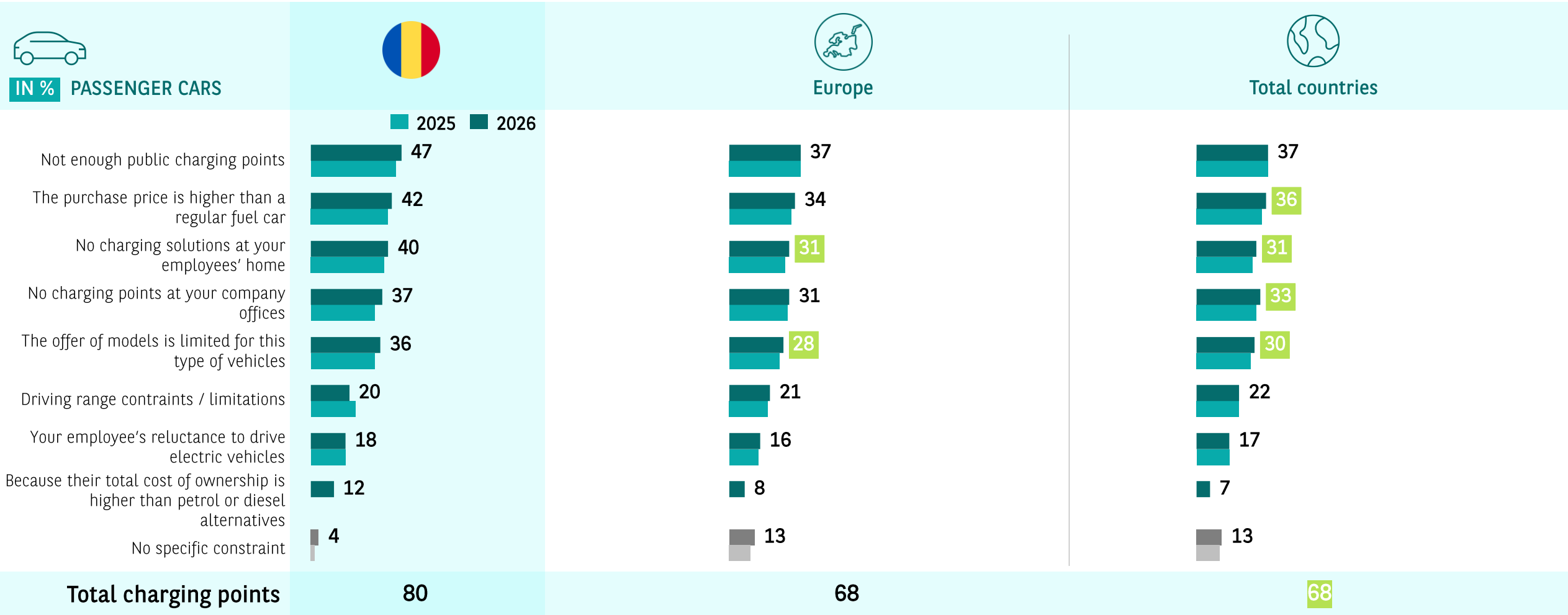
E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?
Basis: companies that are already using or considering using electrified vehicles technologies for passenger cars

X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC PASSENGER CARS

HOW TO READ THE RESULTS ?

In Romania in 2026, 47% of the companies with passenger cars declare that the main constraint for using electric passenger cars is: Not enough public charging points. And 80% of the companies mention at least one reason related to charging points.



E28B_1. What are the constraints of using electric passenger cars (Battery Electric Vehicles)?
Basis: companies with PCs and aware of EV technology

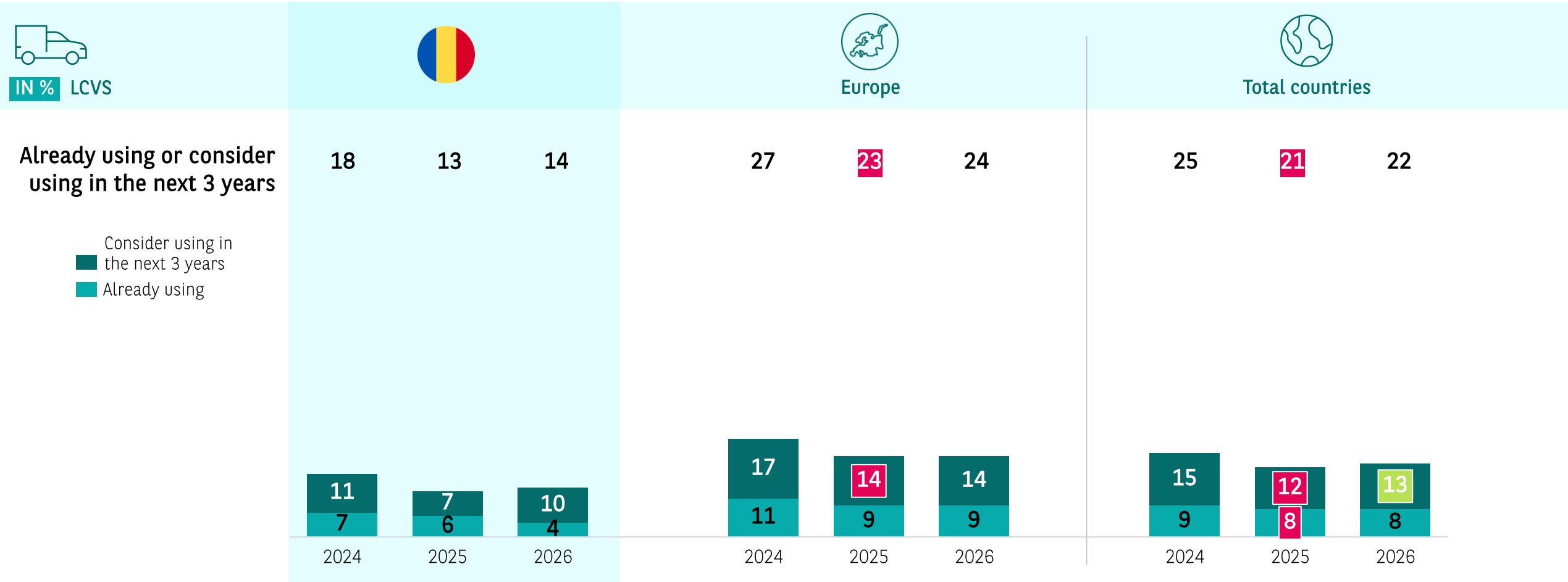
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Romania in 2026, 14% of the companies with LCVs are already using BEV or are considering doing so in the next 3 years.



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with LCVs

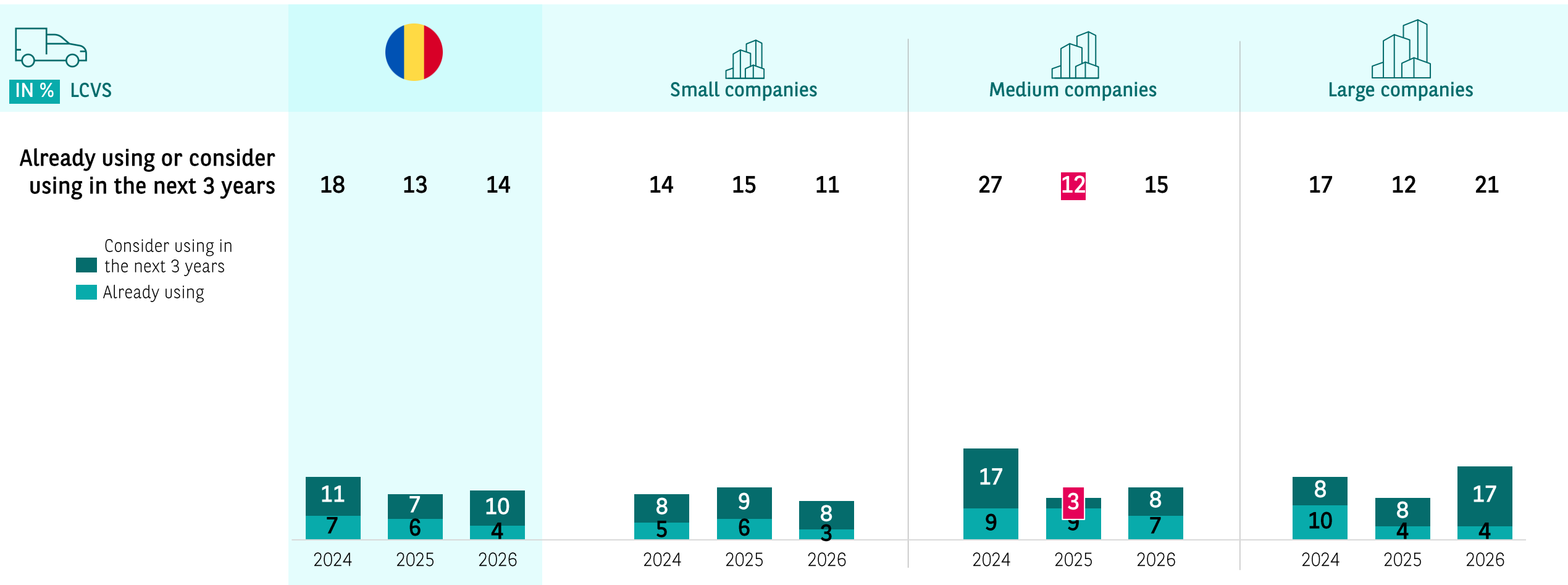
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Romania in 2026, 14% of the companies with LCVs are already using BEV or are considering doing so in the next 3 years.



E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with LCVs

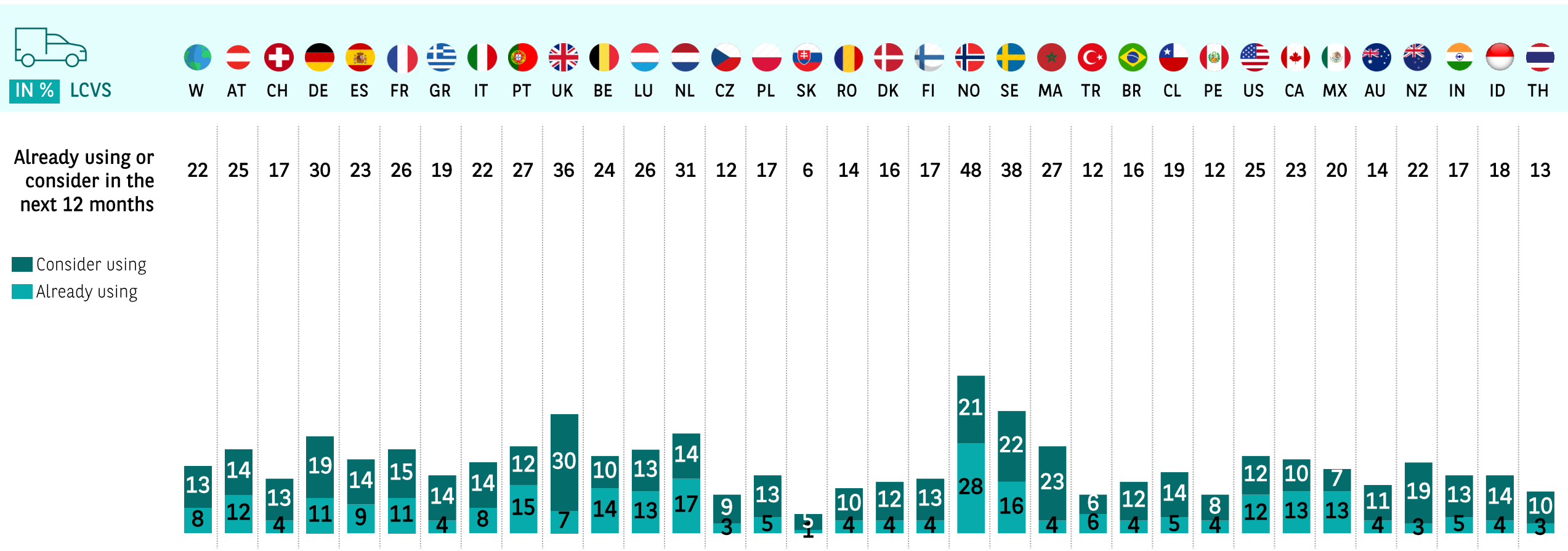
X% Significantly higher / lower vs. previous wave

ELECTRIFIED VEHICLES TECHNOLOGIES USAGE

FOCUS ON BEV

HOW TO READ THE RESULTS ?

In Romania in 2026, 14% of the companies with LCVs are already using BEV or are considering using it in the next three years.

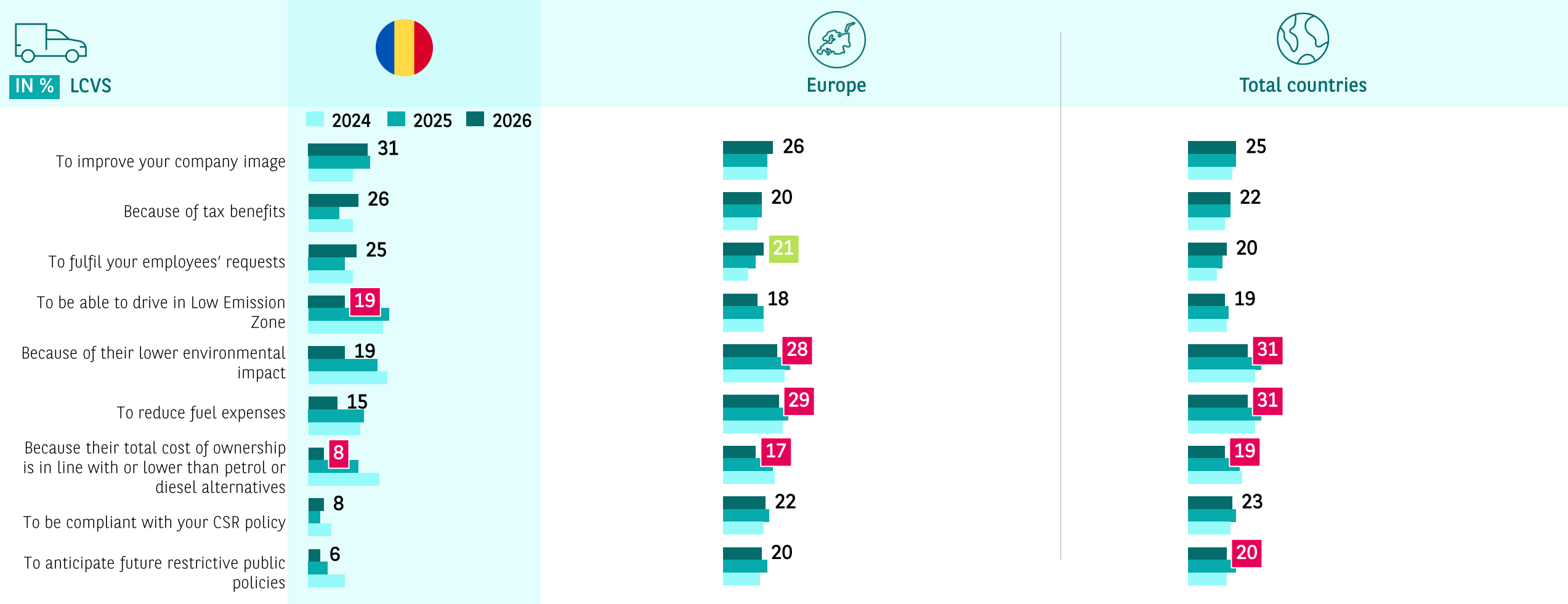


E28. Amongst the following electrified vehicles technologies, which ones do you currently use...?
 E28bis. Amongst the following electrified vehicles technologies, which ones are you considering using...?
 Basis: companies with LCVs

REASONS FOR IMPLEMENTING ELECTRIFIED VEHICLES TECHNOLOGIES FOR LCVs

HOW TO READ THE RESULTS ?

In Romania in 2026, 31% of the companies with LCVs are already using electrified vehicles technologies or are considering it To improve your company image.



E28A. Why have you already implemented or why do you consider implementing these electrified vehicles technologies?
Basis: companies that are already using or considering using electrified vehicles technologies for LCVs

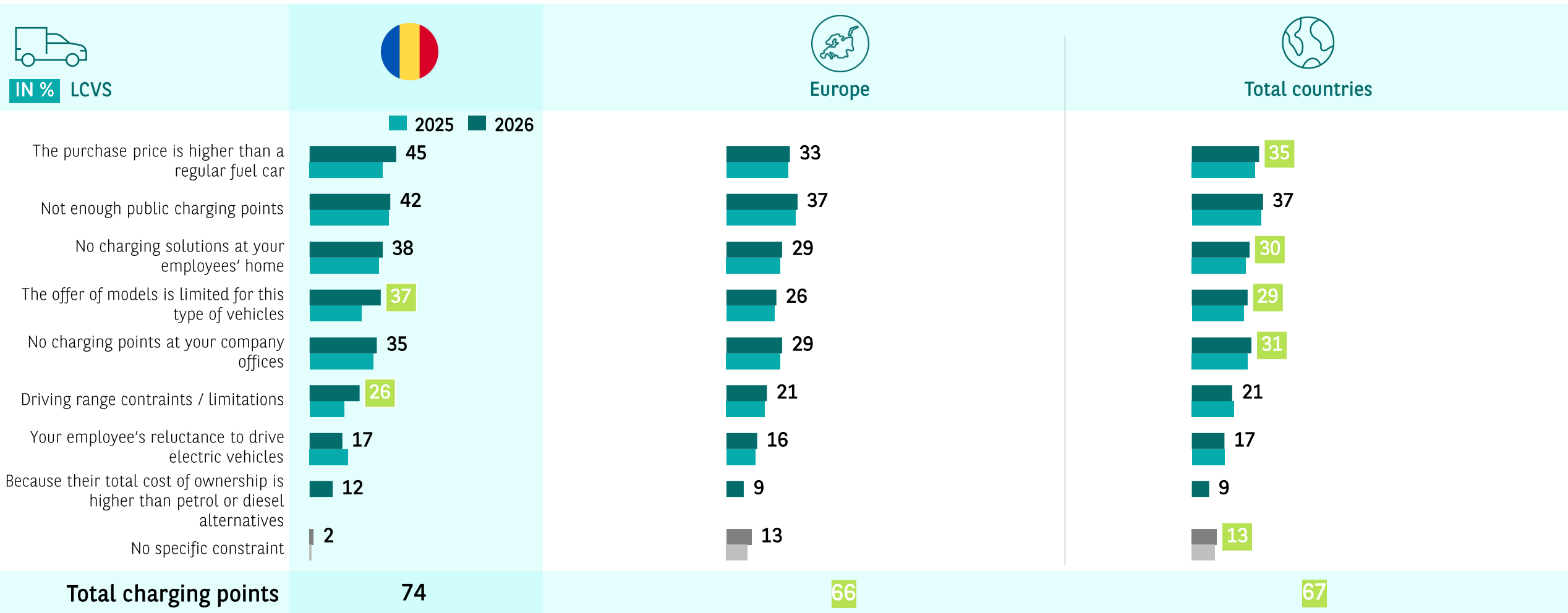
X% Significantly higher / lower vs. previous wave

CONSTRAINTS FOR USING ELECTRIC LIGHT COMMERCIAL VEHICLES

HOW TO READ THE RESULTS ?

In Romania in 2026, 45% of the companies with LCVs declare that the main constraint for using electric LCVs is: The purchase price is higher than a regular fuel car.

And 74% of the companies mention at least one reason related to charging points.



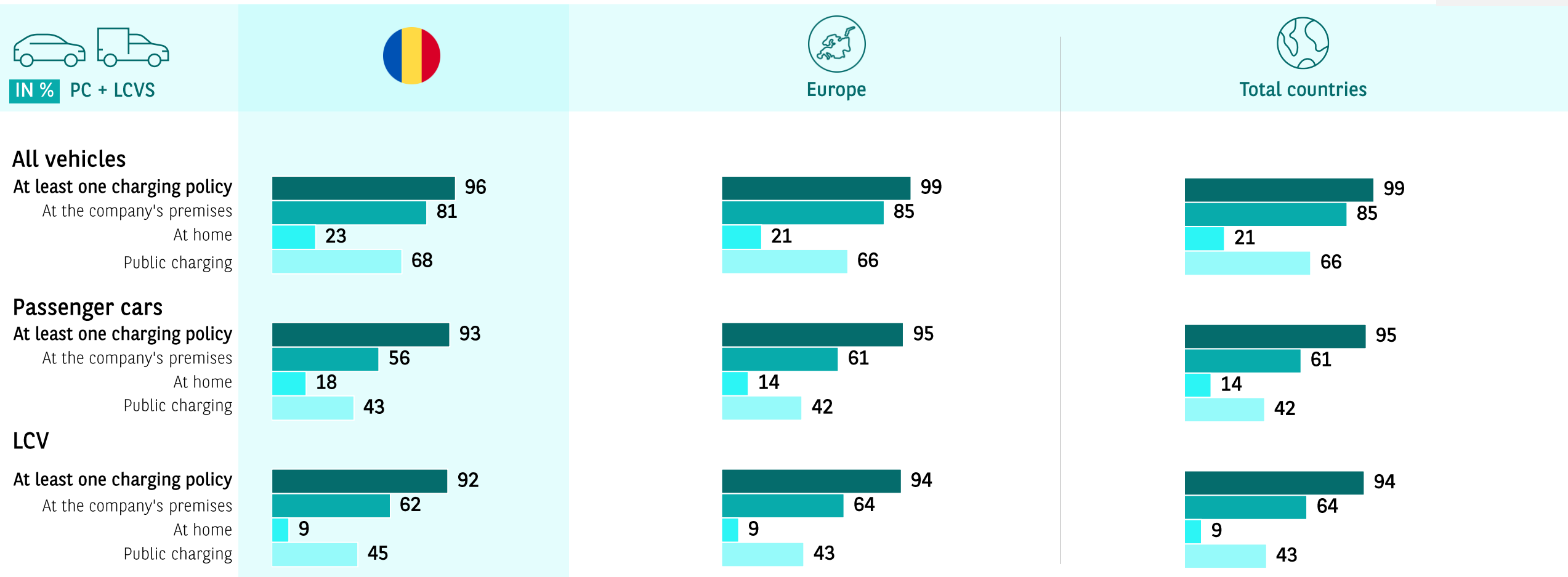
E28B_2. What are the constraints of using electric light commercial vehicles (Battery Electric Vehicles)?
Basis: companies with LCVs and aware of EV technology

X% Significantly higher/lower vs. previous wave

HOW TO READ THE RESULTS ?

In Romania in 2026, 96% of the companies have at least one charging policy or will have in the future for all vehicles.

New question



E31. What charging policy does your company currently use, or what policy will it use in the future?

Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Romania in 2026, 96% of the companies have at least one charging policy or will have in the future for all vehicles.

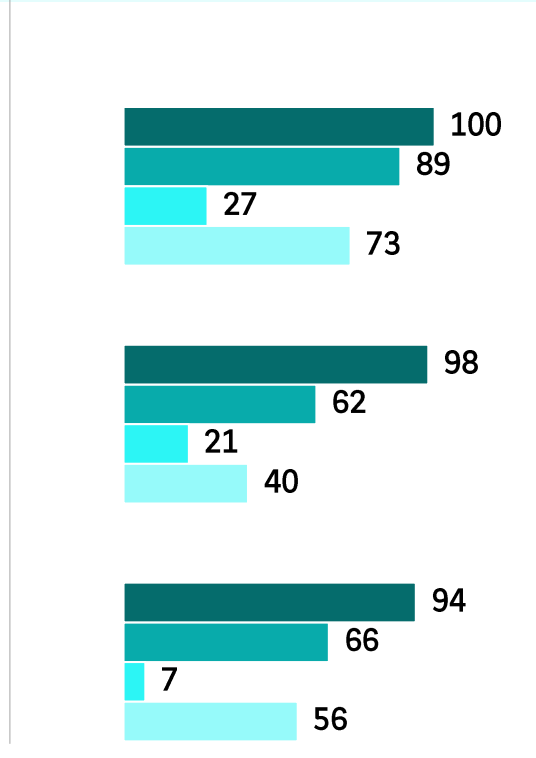
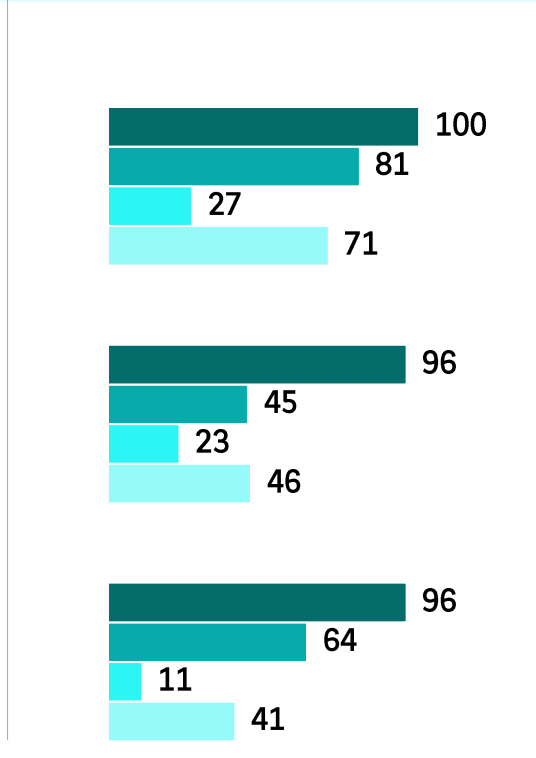
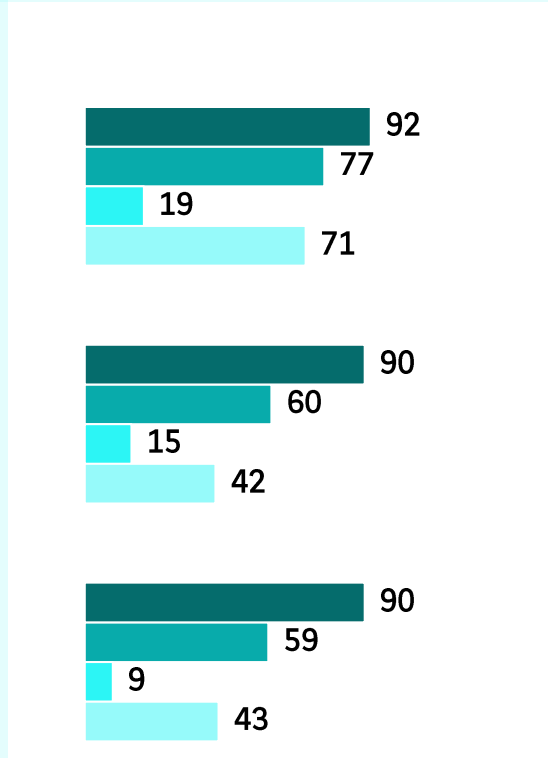
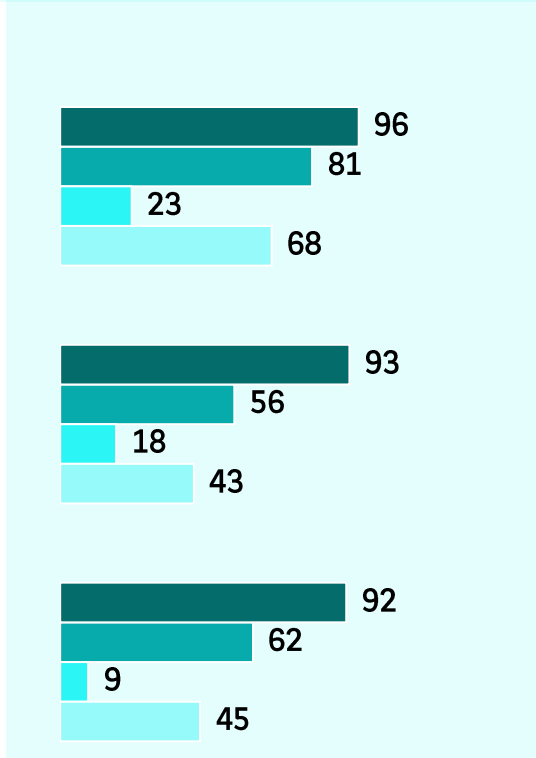
New question



All vehicles
At least one charging policy
 At the company's premises
 At home
 Public charging

Passenger cars
At least one charging policy
 At the company's premises
 At home
 Public charging

LCV
At least one charging policy
 At the company's premises
 At home
 Public charging

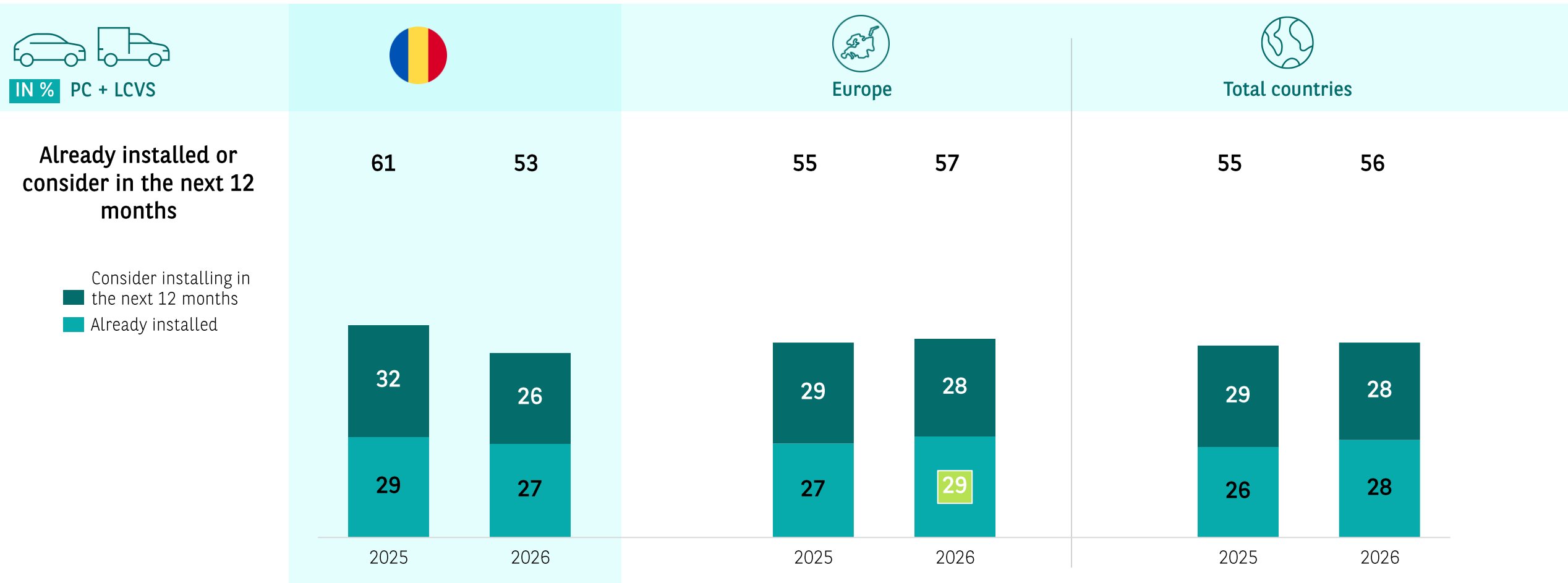


E31. What charging policy does your company currently use, or what policy will it use in the future?
 Basis: companies with corporate vehicles = 100%

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In Romania in 2026, 53% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



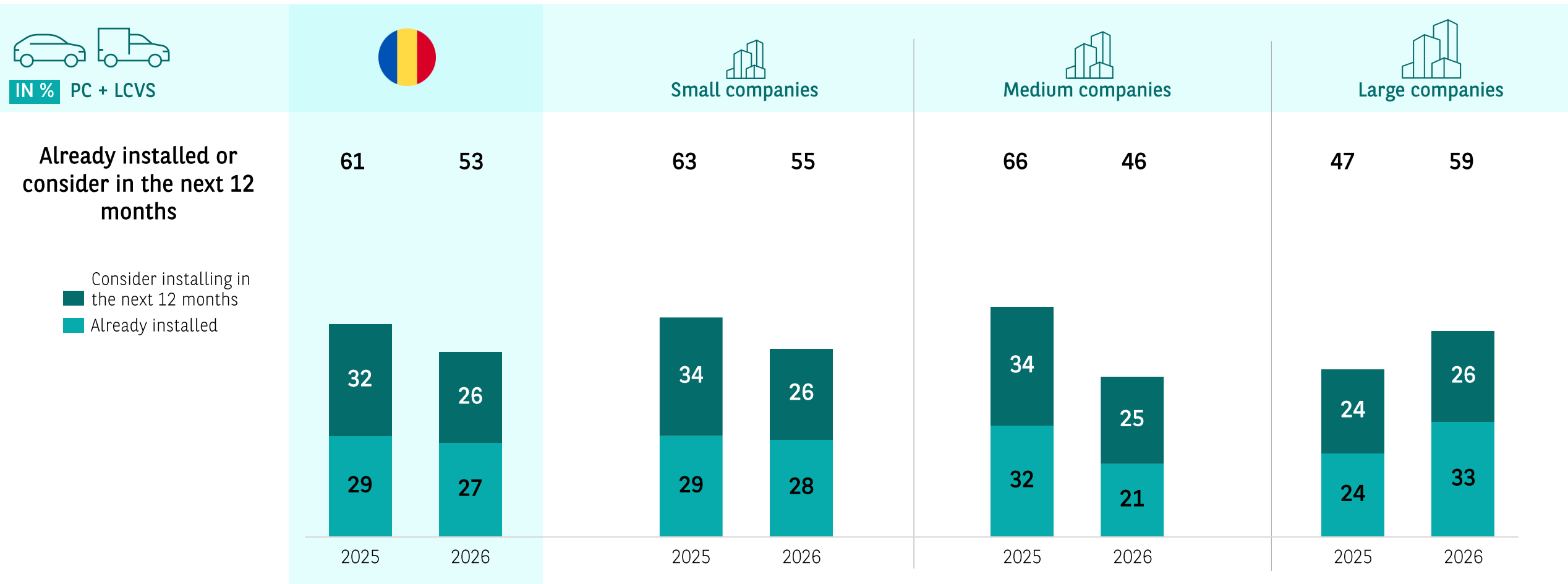
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher / lower vs. previous wave

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In Romania in 2026, 53% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



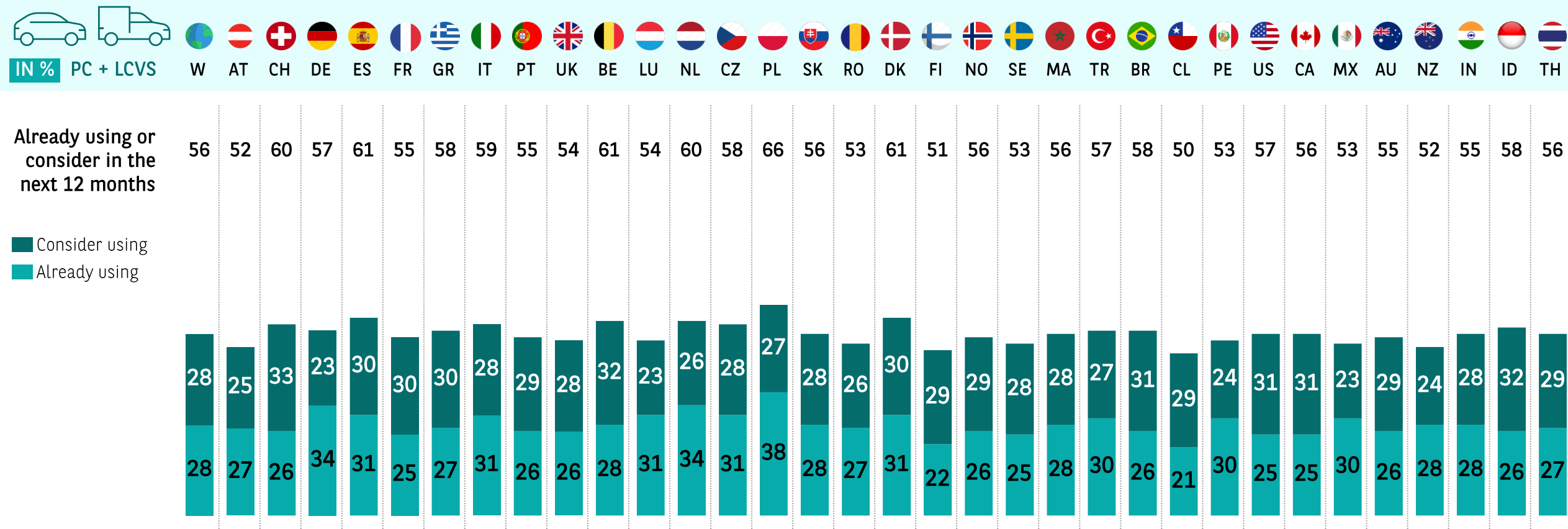
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

X% Significantly higher / lower vs. previous wave

INSTALLATION OF CHARGING POINTS AT COMPANY'S PREMISES

HOW TO READ THE RESULTS ?

In Romania in 2026, 53% of the companies that are using or considering charging at the company's premises have already installed charging points at the company's premises or are considering doing so in the next 12 months.



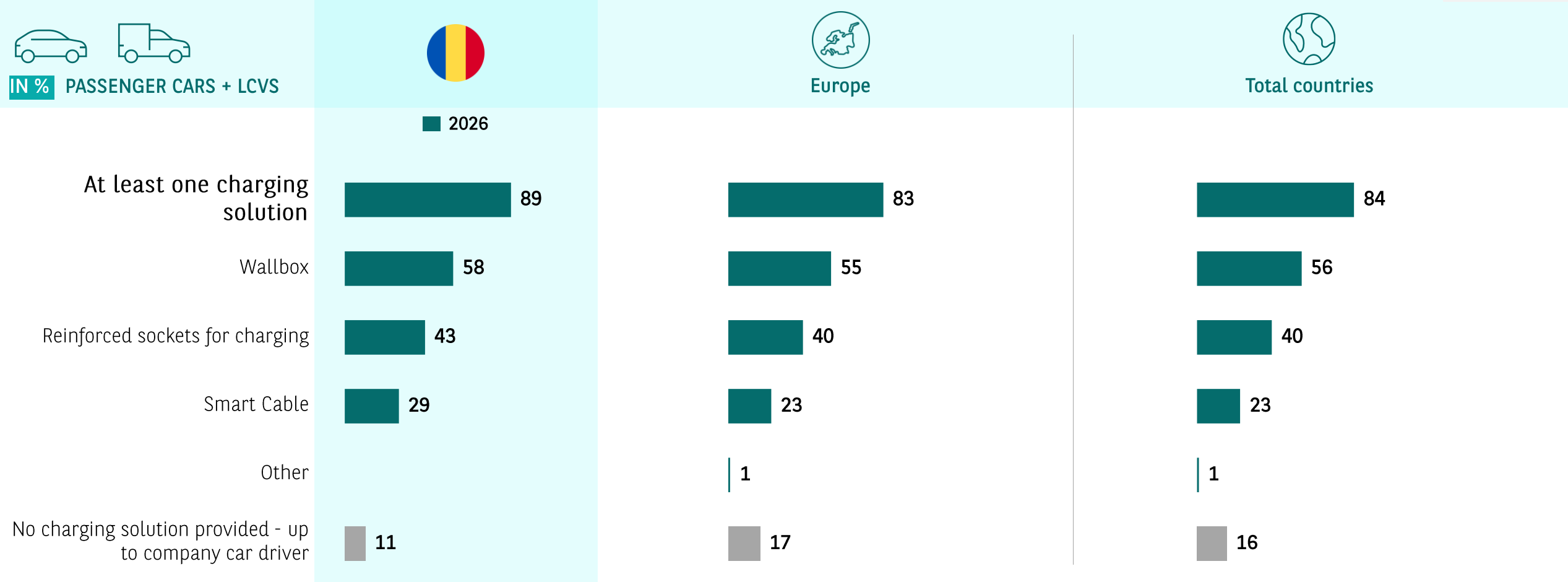
E32. Regarding charging at the company's premises, have you already installed charging points, or are you considering doing so in the next 12 months?
 Basis: companies that are using or considering charging at the company's premises for passenger car or LCVs

TYPE OF HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In Romania in 2026, 89% of the companies that are using or considering home charging offer or plan to offer at least one charging solution to company drivers.

New question



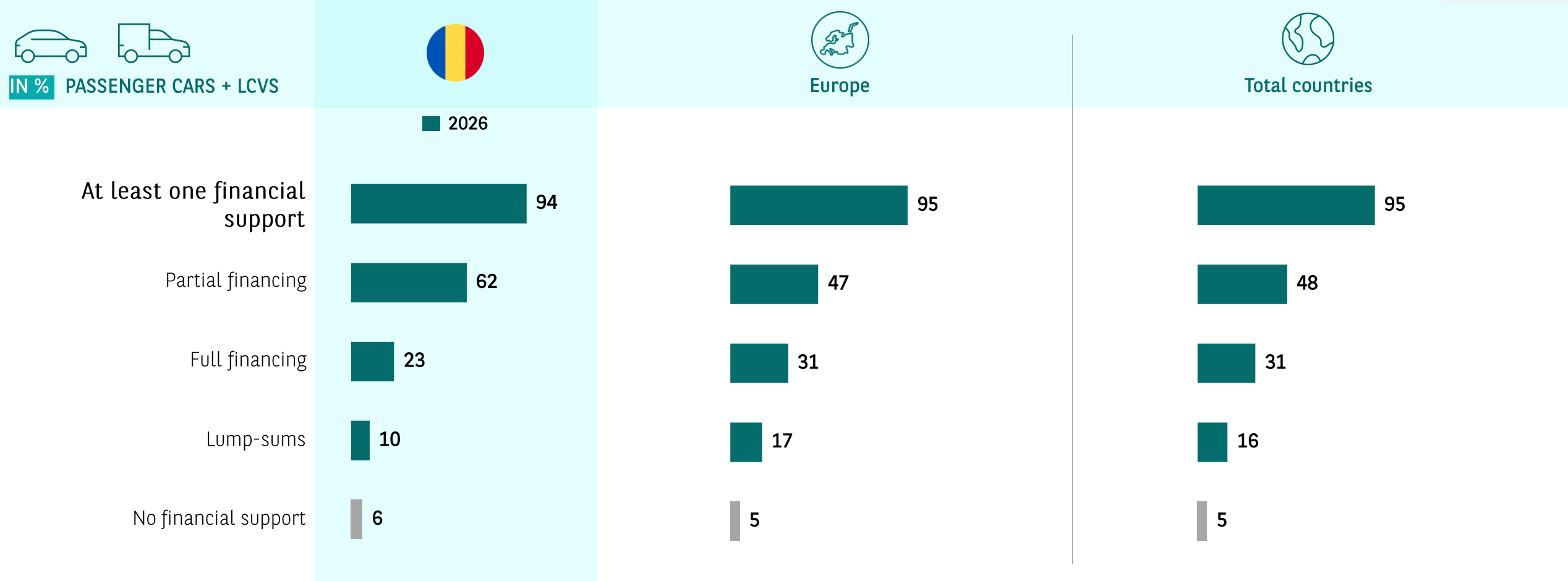
E34.NEW. Regarding home charging, what kind of home charging solutions does your company offer or plan to offer for the company car drivers?
Basis: companies that are using or considering home charging for passenger car or LCVs

TYPE OF FINANCIAL SUPPORT FOR HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In Romania in 2026, 94% of the companies that offer or plan to offer at least one charging solution to company drivers, provide at least one solution to support the provision of home charging solutions to company car drivers or plans to do so in the next 12 months.

New question



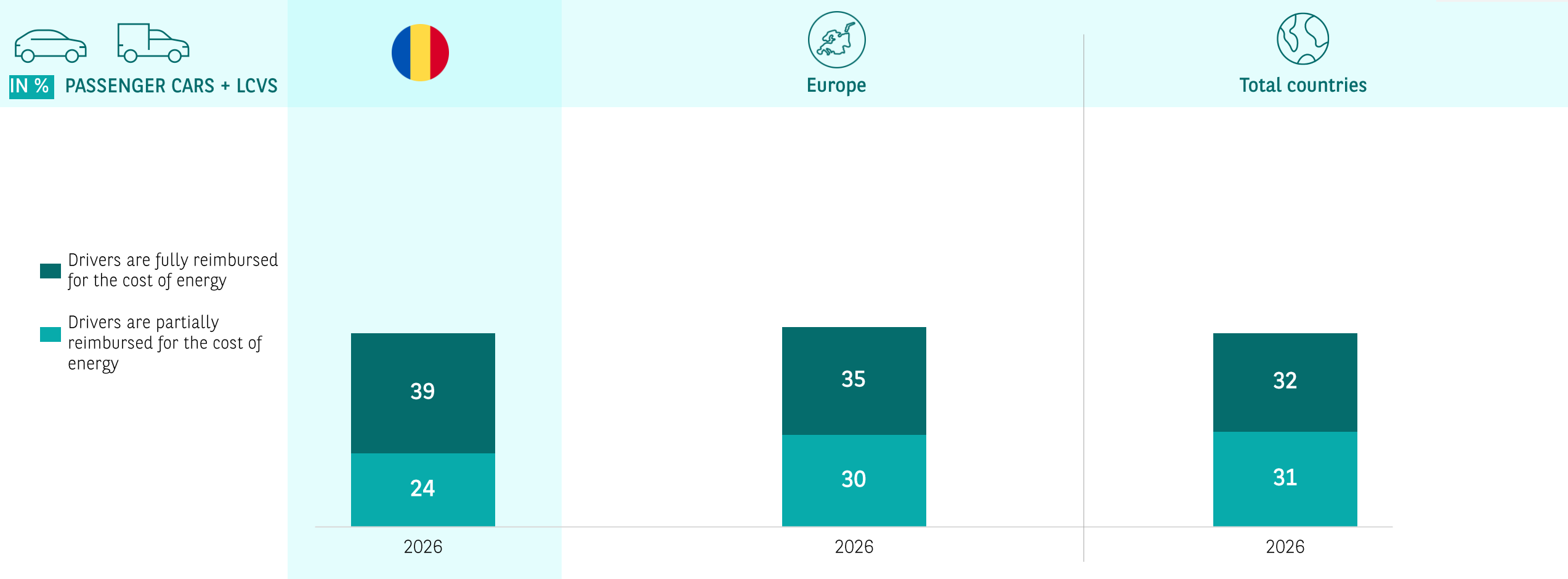
E35.NEW. How does your company financially support the provision of home charging solutions to company car drivers, or plans to do so in the next 12 months?
Basis: companies that offer or plan to offer at least one charging solution to company drivers

COST MANAGEMENT OF HOME CHARGING POINTS

HOW TO READ THE RESULTS ?

In Romania in 2026, 39% of the companies that are already financially supporting or are considering financially supporting home charging points, fully reimburse drivers for the cost of energy, or plan doing so.

New question

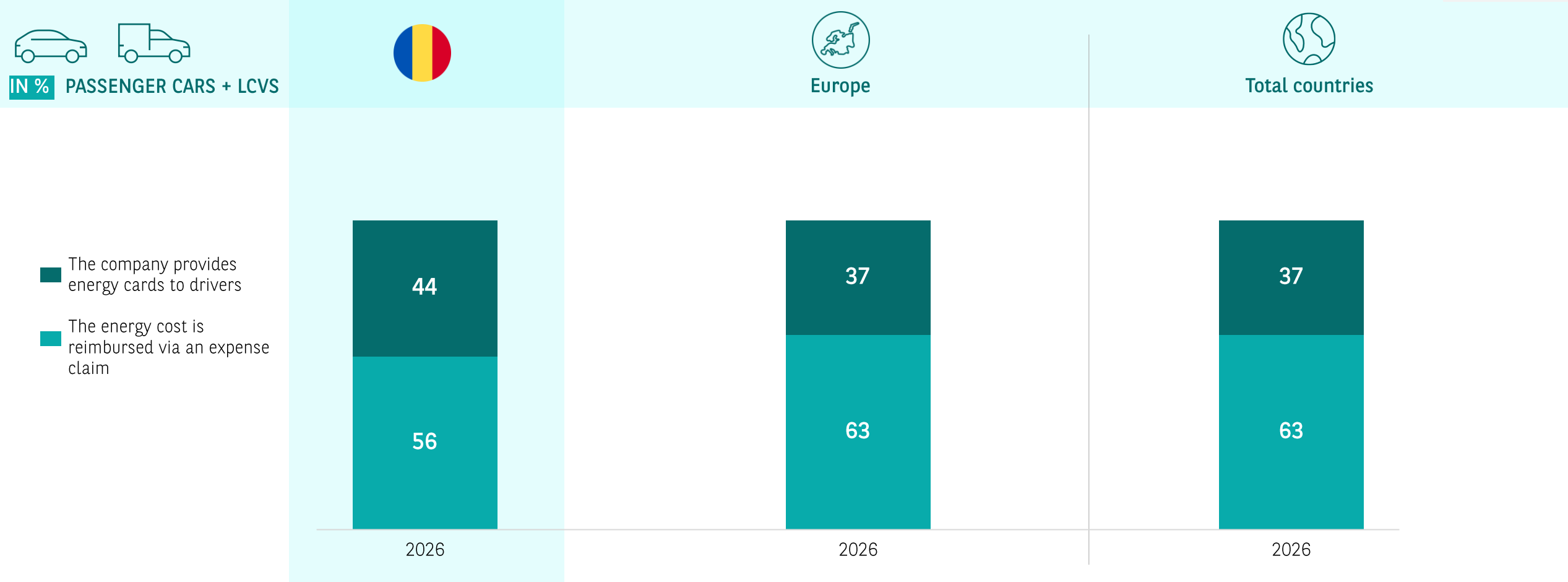


E36. How do you manage or plan to manage the energy costs of home charging for company car drivers?
Basis: companies that are already financially supporting or are considering financially supporting home charging points

HOW TO READ THE RESULTS ?

In Romania in 2026, 44% of the companies that are using or considering public charging provide energy cards to drivers.

New question



E37. Regarding public charging, how does your company manage or plan to manage the cost of recharging for professional usage of company cars?
 Basis: companies using or considering public charging for passenger cars of LCVs

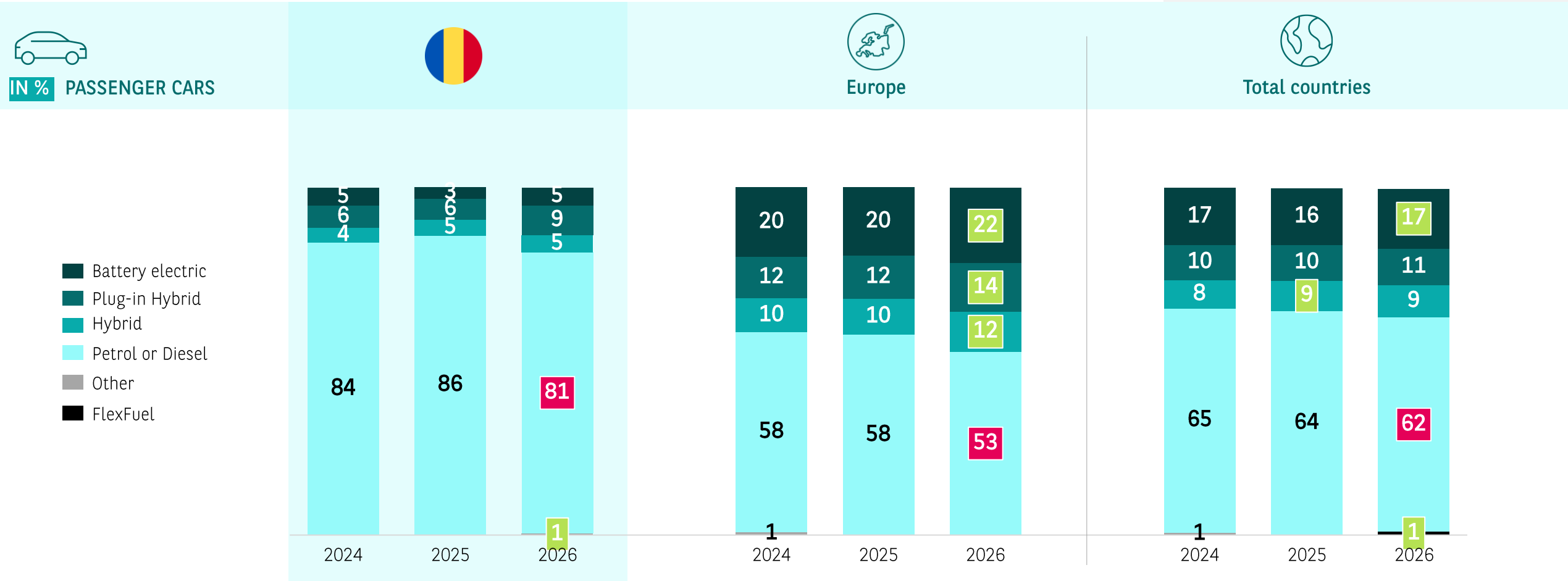
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In Romania in 3 years, 5% of the passenger car fleet is expected to be BEV.

Item "FlexFuel" new and only asked in BR, CL, PE



A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

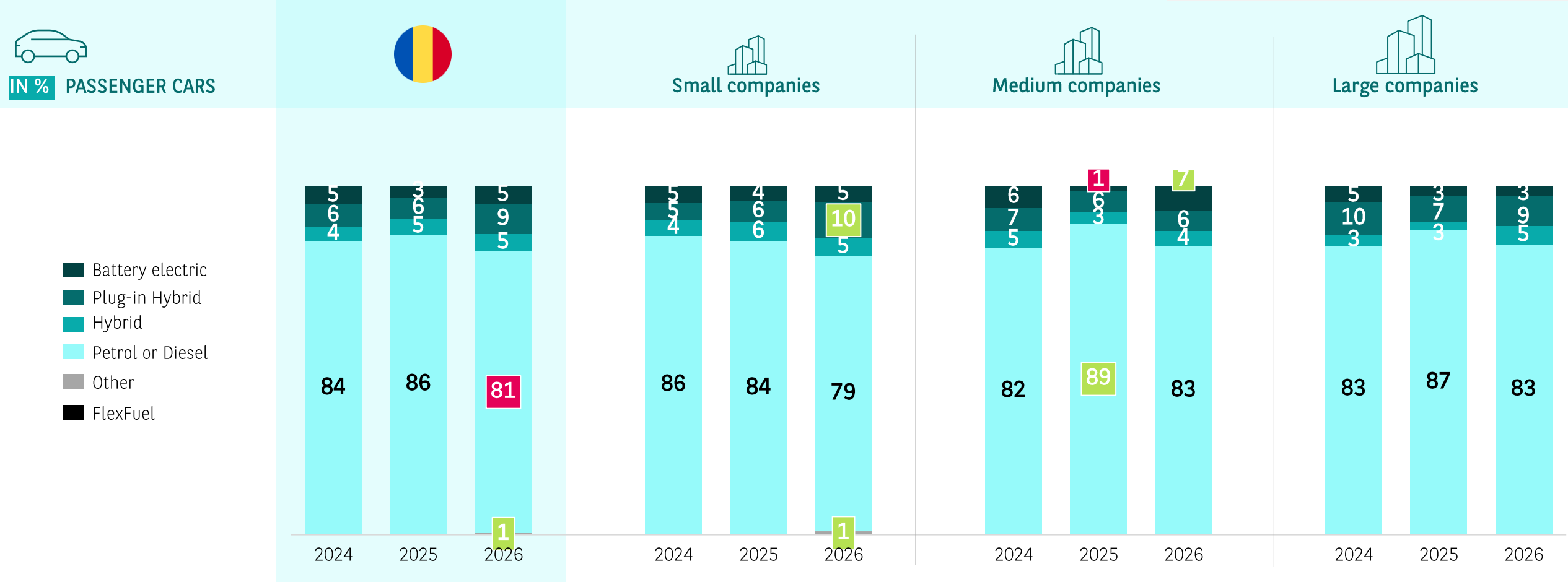
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In Romania in 3 years, 5% of the passenger car fleet is expected to be BEV.

Item "FlexFuel" new and only asked in BR, CL, PE



A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

X% Significantly higher / lower vs. previous wave

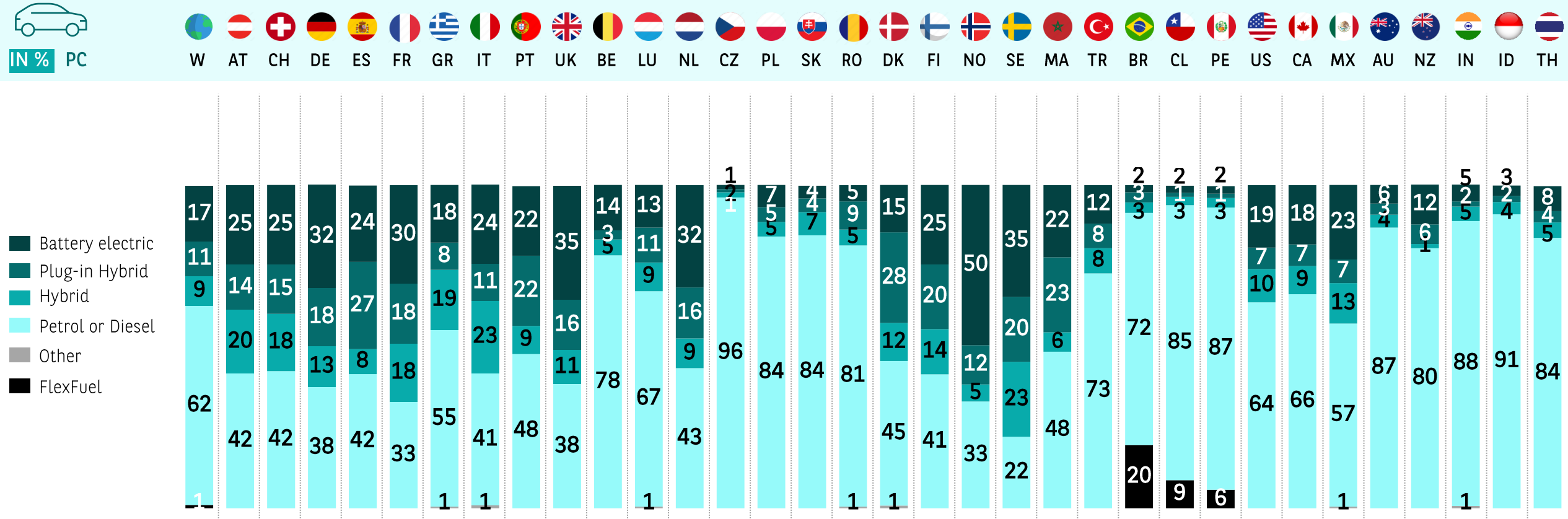
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON PASSENGER CARS

HOW TO READ THE RESULTS ?

In Romania in 3 years, 5% of the passenger car fleet is expected to be BEV.

Item "FlexFuel" new and only asked in BR, CL, PE



A52. What percentage of your passenger car fleet do you expect to be: battery electric, Plug-in Hybrid, Hybrid, petrol or diesel vehicles in 3 years?
Basis: companies with passenger cars

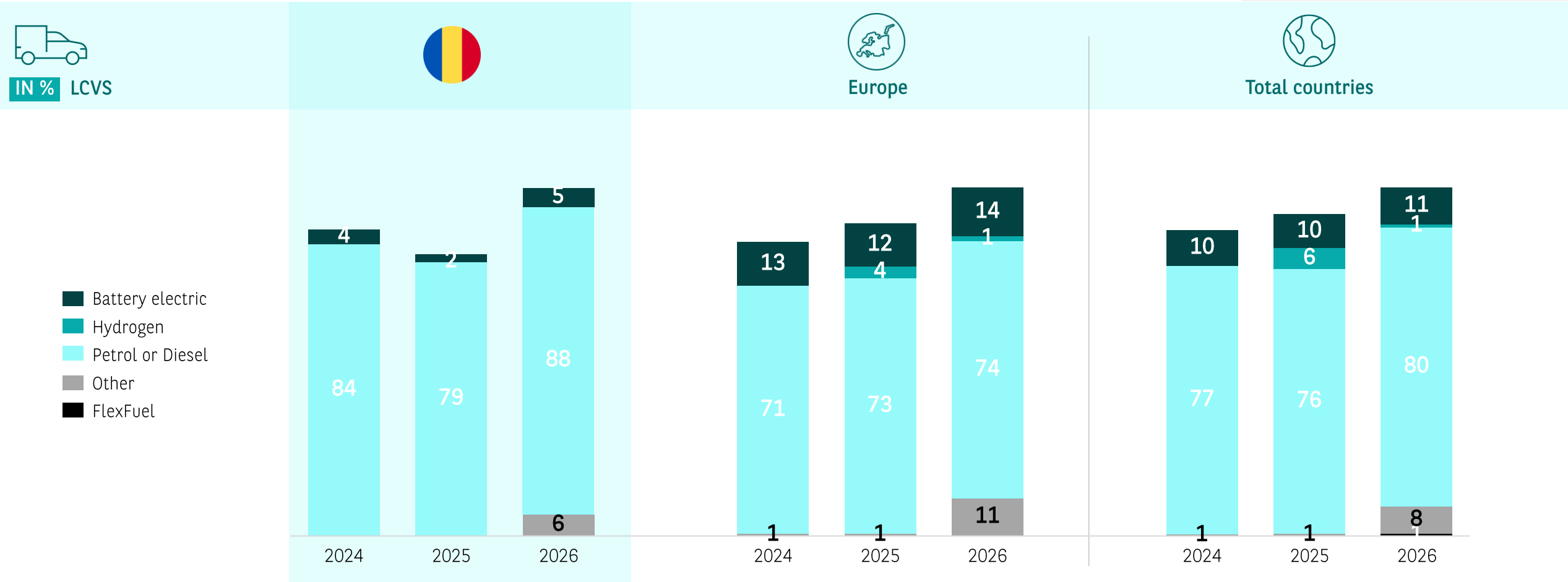
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

HOW TO READ THE RESULTS ?

In Romania in 3 years, 5% of the LCV fleet is expected to be BEV.

Item "Plug-in hybrid" deleted in 2026
Item "Hydrogen" asked for 18 countries in 2025 / DE and NL only in 2026



A53. What percentage of your LCV fleet do you expect to be: battery electric, petrol or diesel or Hydrogen fuel cell] vehicles in 3 years?
Basis: companies with LCVs

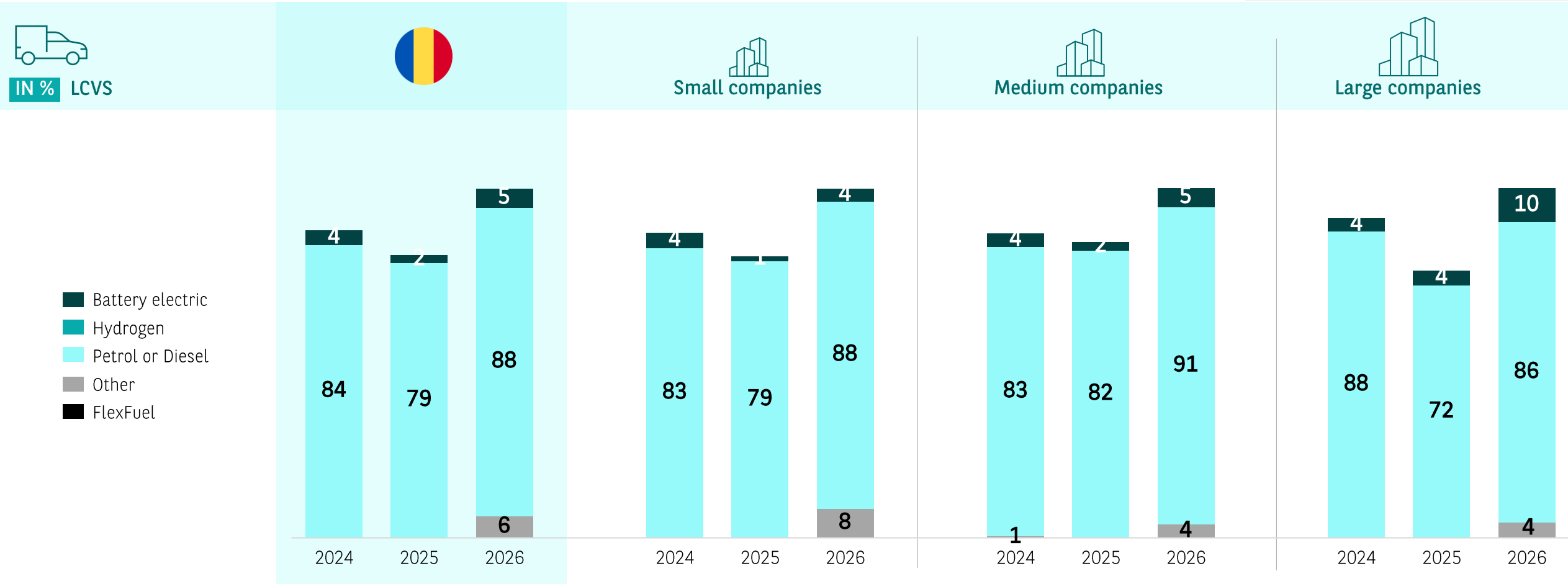
EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVS

HOW TO READ THE RESULTS ?

In Romania in 3 years, 5% of the LCV fleet is expected to be BEV.

Item "Plug-in hybrid" deleted in 2026
Item "Hydrogen" asked for 18 countries in 2025 / DE and NL only in 2026



A53. What percentage of your LCV fleet do you expect to be: battery electric, petrol or diesel or Hydrogen fuel cell] vehicles in 3 years?
Basis: companies with LCVS

EXPECTED FLEET SHARE PER ENERGY

FOCUS ON LCVs

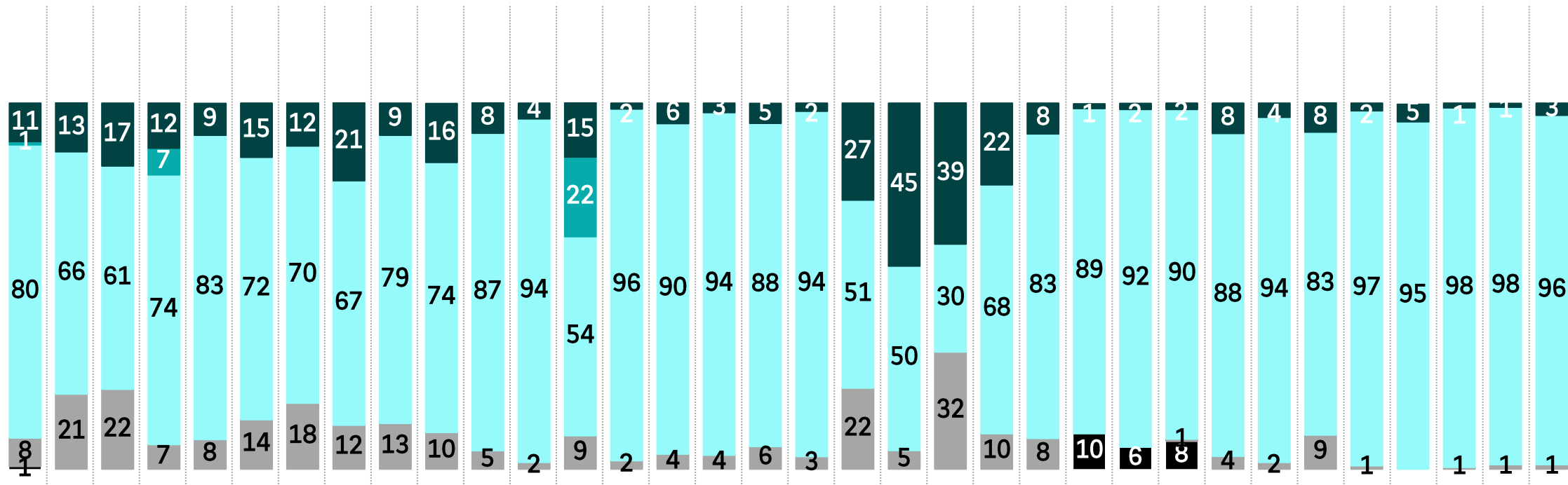
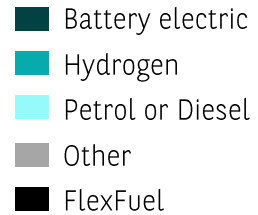
HOW TO READ THE RESULTS ?

In Romania in 3 years, 5% of the LCV fleet is expected to be BEV.

Item "Plug-in hybrid" deleted in 2026
Item "Hydrogen" asked for DE and NL only



IN % LCVs



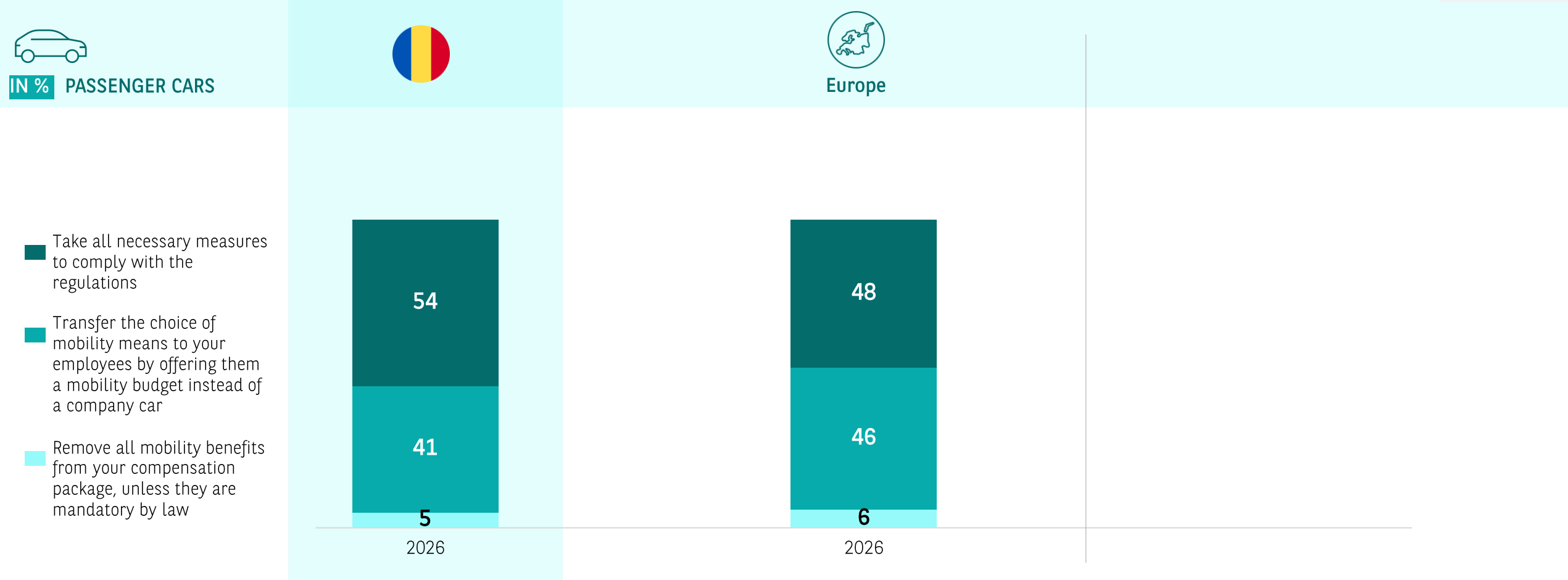
A53. What percentage of your LCV fleet do you expect to be: battery electric, petrol or diesel or Hydrogen fuel cell] vehicles in 3 years?
Basis: companies with LCVs



HOW TO READ THE RESULTS ?

In Romania in 2026, 54% of the companies with passenger cars would take all necessary measures to comply with the regulations, if regulations required them to switch their fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest.

New question

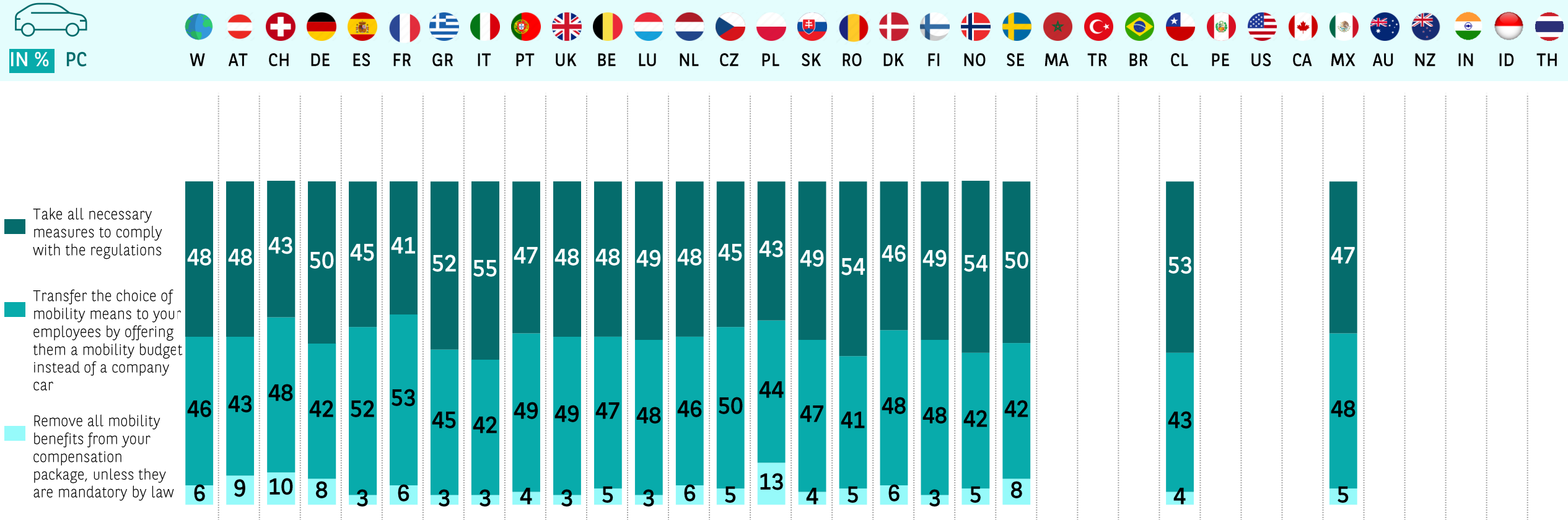


E38. What would you do if regulations required you to switch your fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest?
Basis: companies with passenger cars

HOW TO READ THE RESULTS ?

In Romania in 2026, 54% of the companies with passenger cars would take all necessary measures to comply with the regulations, if regulations required them to switch their fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest.

New question



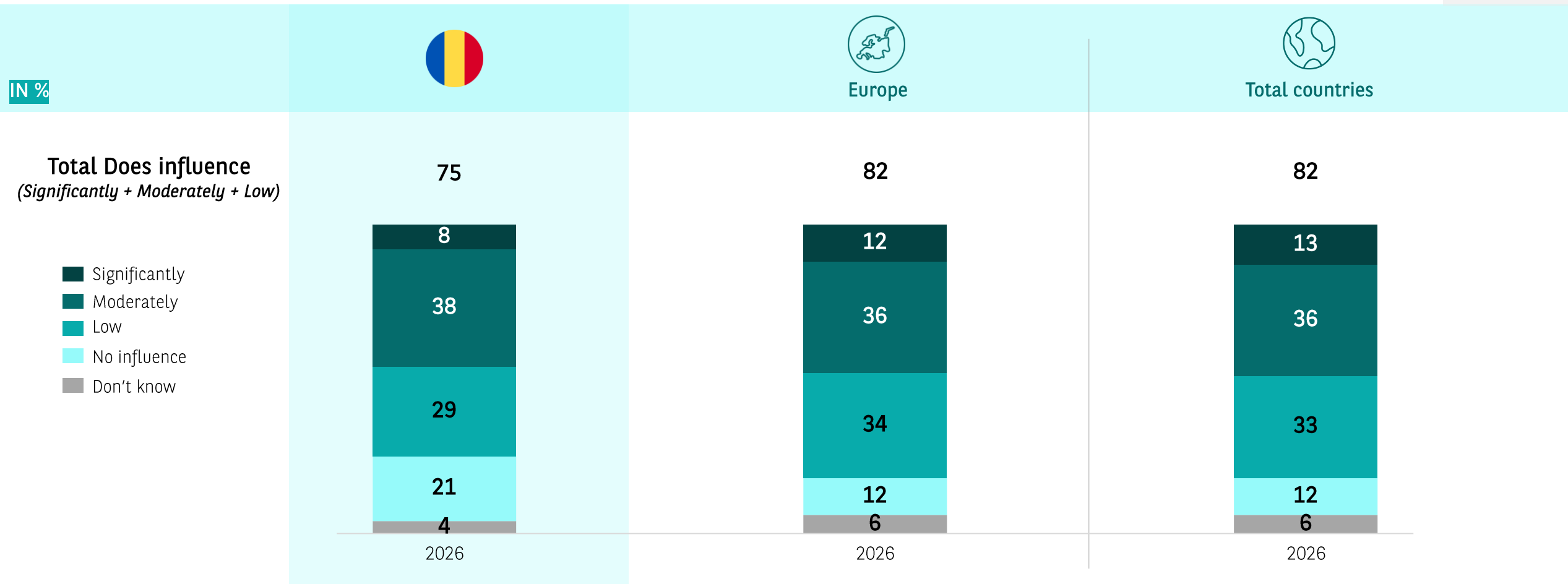
E38. What would you do if regulations required you to switch your fleet of passenger company cars exclusively to battery electric vehicles (BEVs) by 2030 at the latest?
Basis: companies with passenger cars

INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

HOW TO READ THE RESULTS ?

In Romania in 2026, 75% of the companies financing their vehicles with Operational leasing or Financial Leasing declare that their leasing provider influence their decision to move from a thermic vehicle to an electric vehicle.

New question



E29. To what extent does the leasing provider influence your decision to move from a thermic vehicle to an electric vehicle ?
Basis: companies financing their vehicles with Operational leasing or Financial leasing

INFLUENCE OF LEASING PROVIDER ON ENERGY MIX CHOICES

HOW TO READ THE RESULTS ?

In 2026, 75% of the companies financing their vehicles with Operational leasing or Financial leasing declare that their leasing provider influence their decision to move from a thermic vehicle to an electric vehicle.

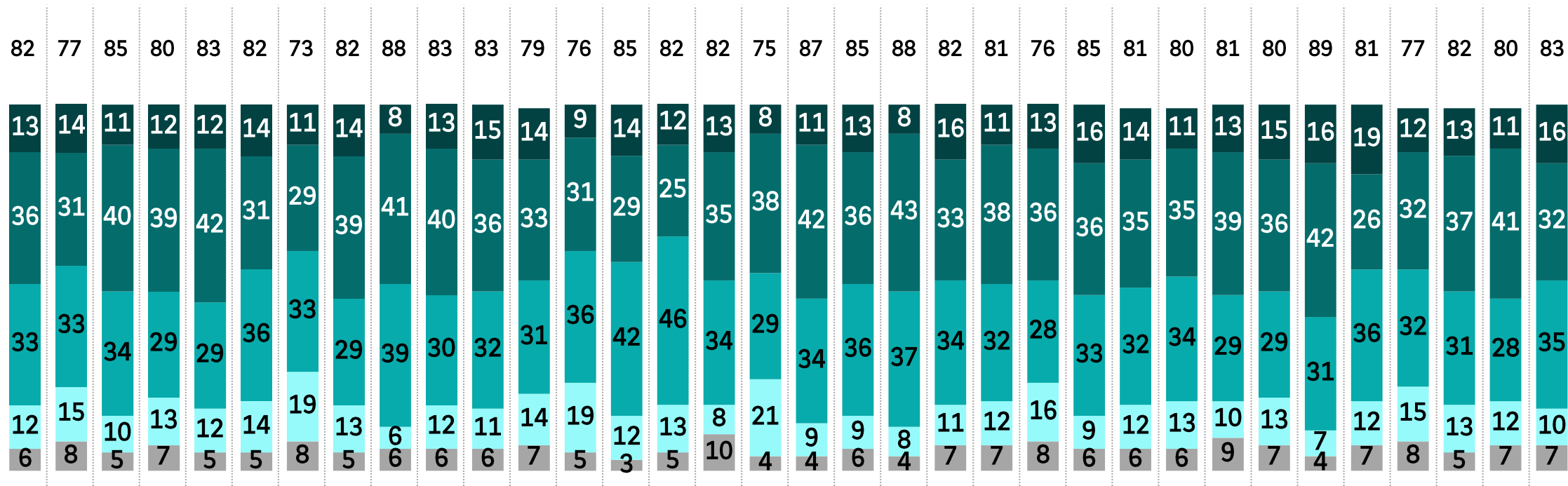
New question

IN %



Total Does influence
(Significantly + Moderately + Low)

- Significantly
- Moderately
- Low
- No influence
- Don't know



E29. To what extent does the leasing provider influence your decision to move from a thermic vehicle to an electric vehicle ?
Basis: companies financing their vehicles with Operational leasing or Financial leasing

04

CONNECTED FLEETS

What are the applications in terms of connected vehicles, data management solutions, and road safety equipment?



Stable telematics adoption aligning with the European standards

In 2026, 39% of companies in Romania have connected vehicles for all or part of their fleet, remaining steady over 2025 and aligning the European average of 37%. A trend driven by large companies (49%) and medium-sized companies (44%) rather than small companies (33%).

Data usage is modest, but significant potential lies ahead

In 2026, 20% of the companies in Romania claimed using data from telematics platforms, steady from the past two years and in line with the European average of 16%. 47% of companies are still considering leveraging this data, maintaining its potential.

Vehicle location and operational efficiency are key reasons for using telematics data

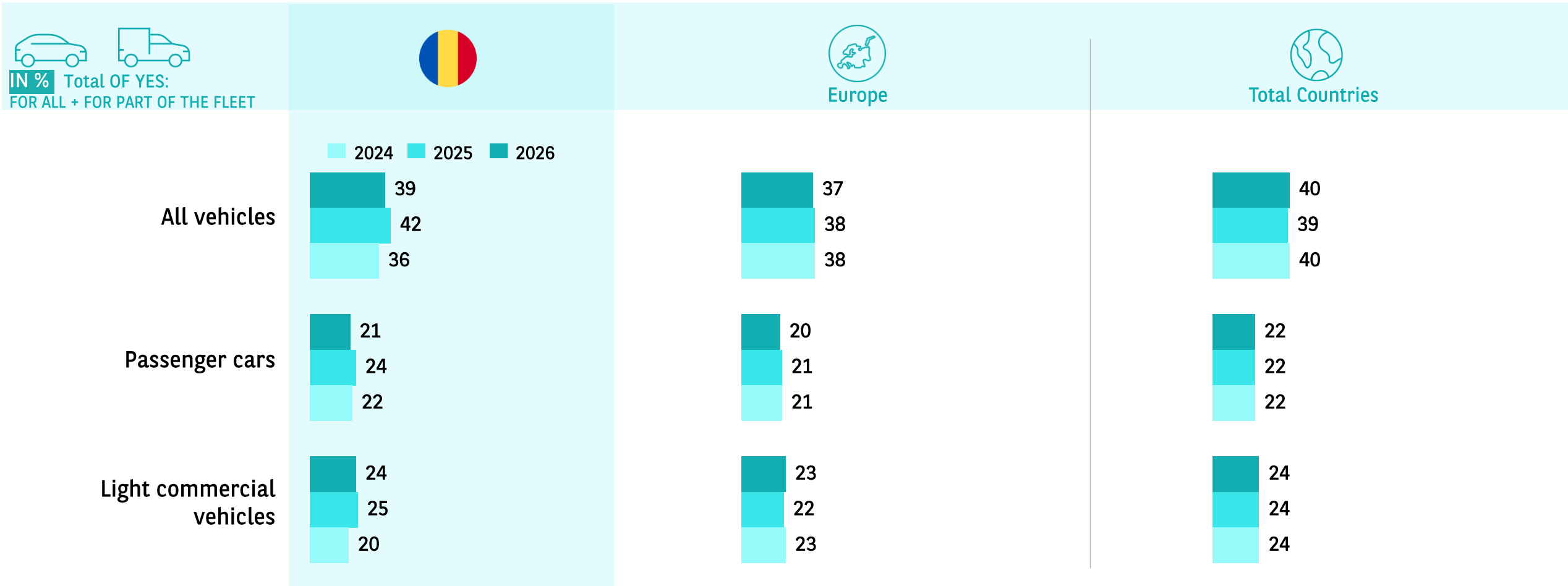
The primary purposes for using telematics data are to locate vehicles or enhance vehicle security, applicable to both passenger cars (27%) and LCVs (34%), and to improve operational efficiency (26% for passenger cars and 34% for LCVs). Another top reason for LCVs is to improve driver safety and behavior (30%).

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Romania in 2026, 39% of the companies have connected vehicles for all or part of their fleet.

21% have connected passenger cars and 24% have connected LCVs.



E23c. Is your fleet connected thanks to a telematic tool?

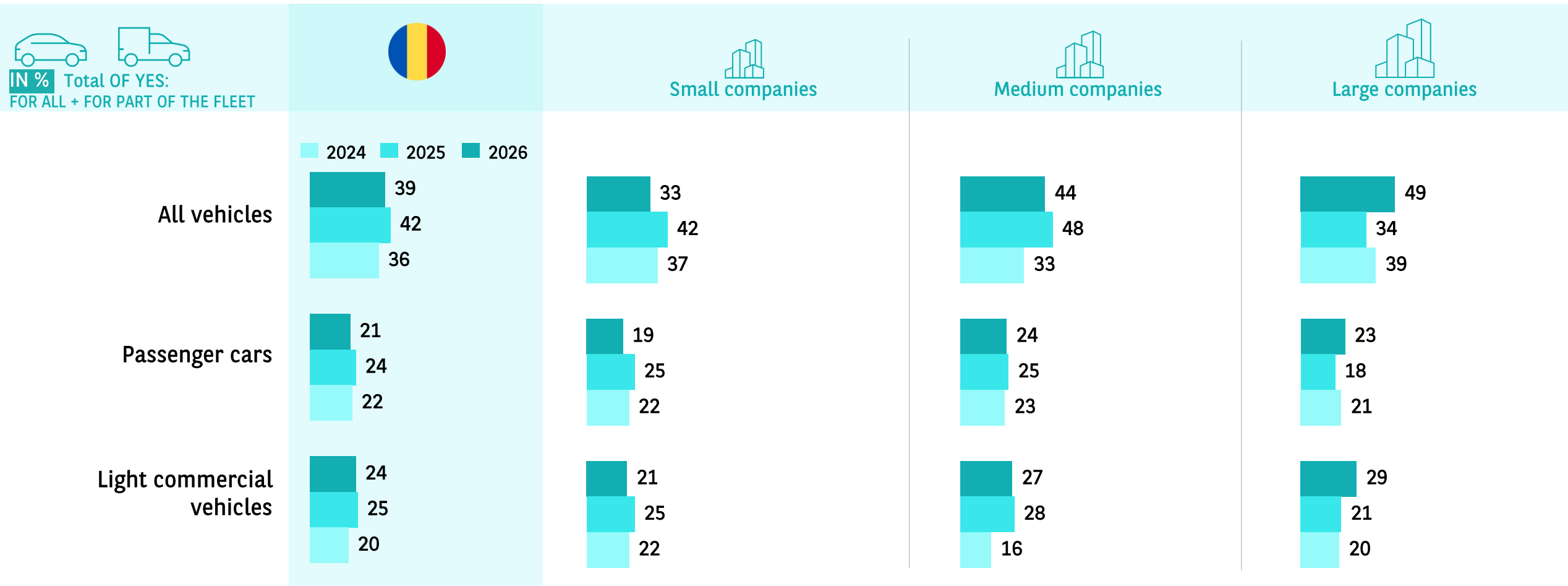
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Romania in 2026, 39% of the companies have connected vehicles for all or part of their fleet. 21% have connected passenger cars and 24% have connected LCVs.



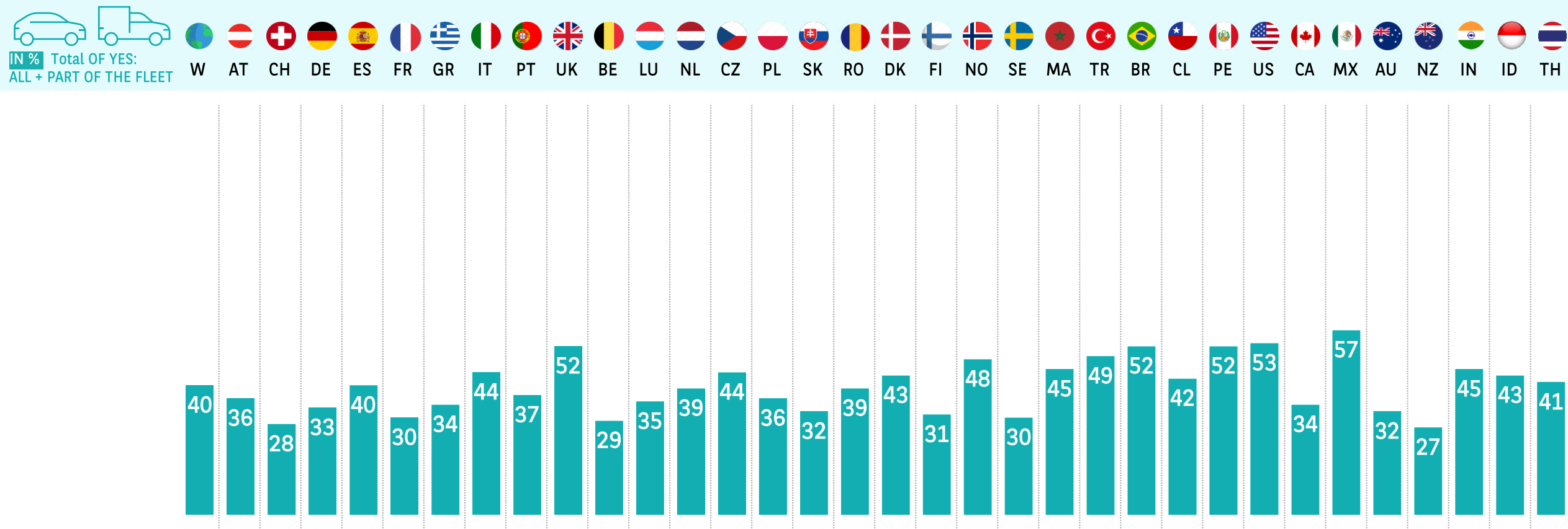
E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING CONNECTED VEHICLES

HOW TO READ THE RESULTS ?

In Romania in 2026, 39% of the companies have connected vehicles for all or part of their fleet.

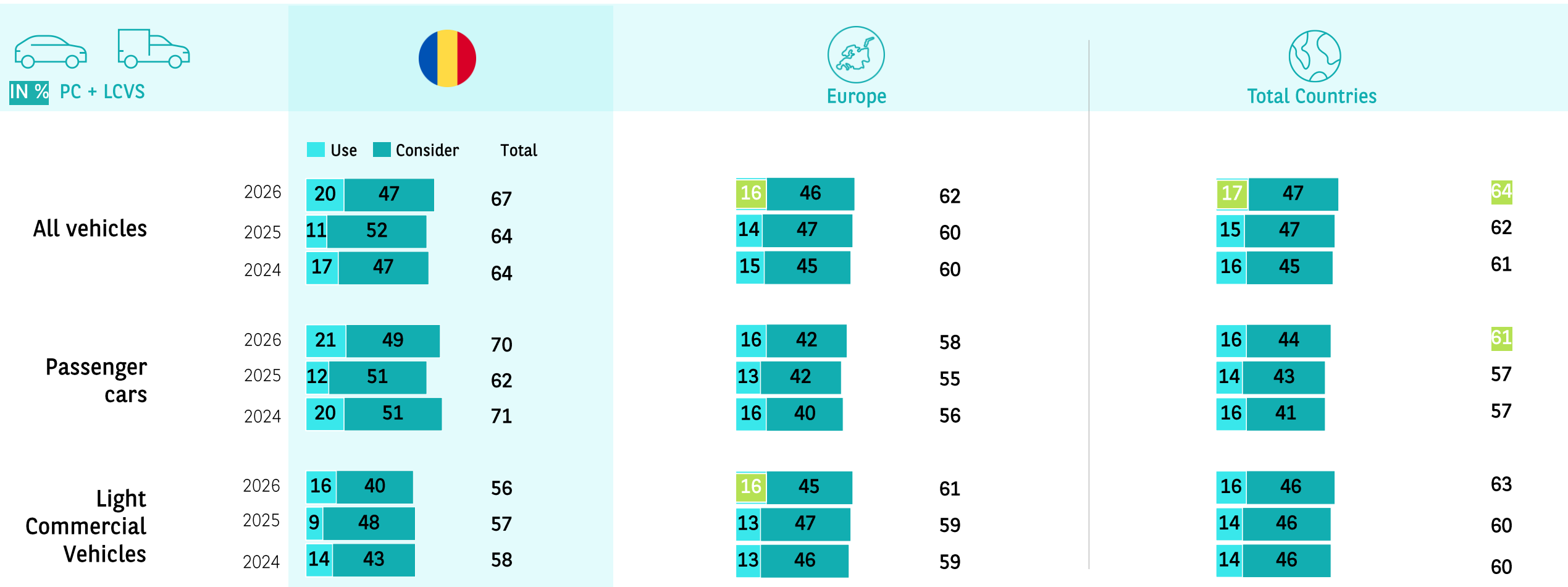


E23c. Is your fleet connected thanks to a telematic tool?
Basis: companies with corporate vehicles = 100%

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Romania in 2026, 67% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



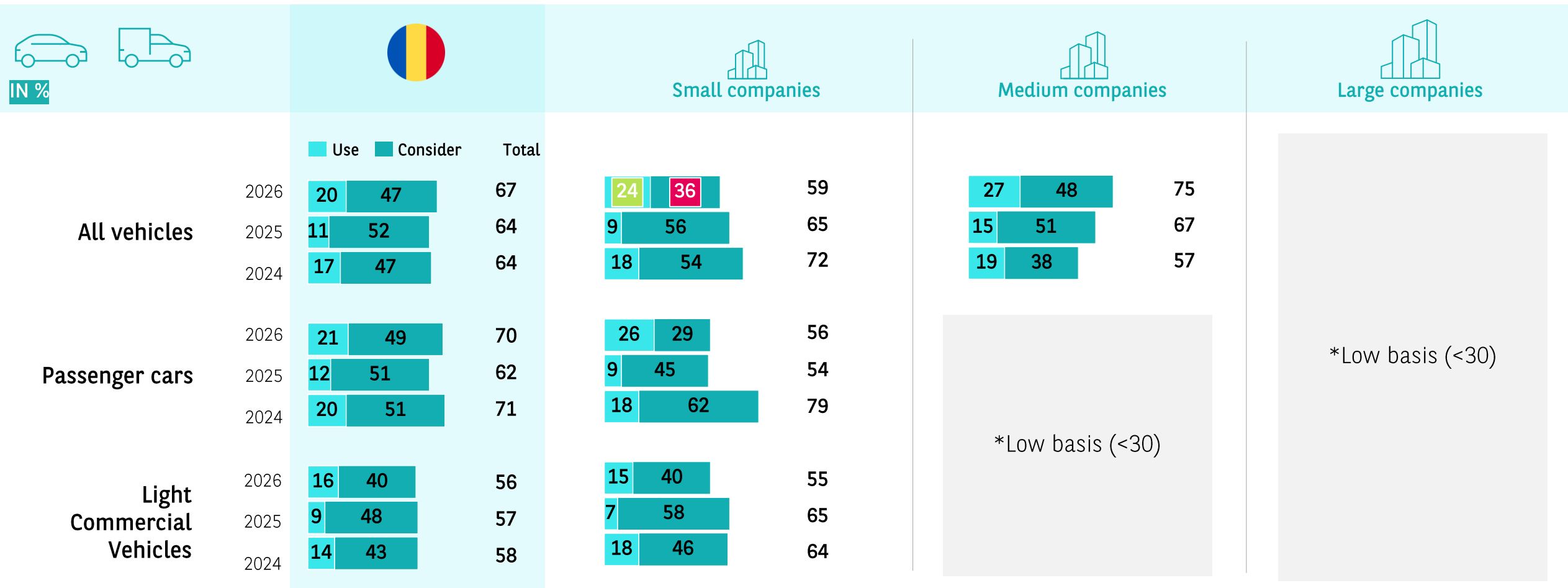
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Romania in 2026, 67% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



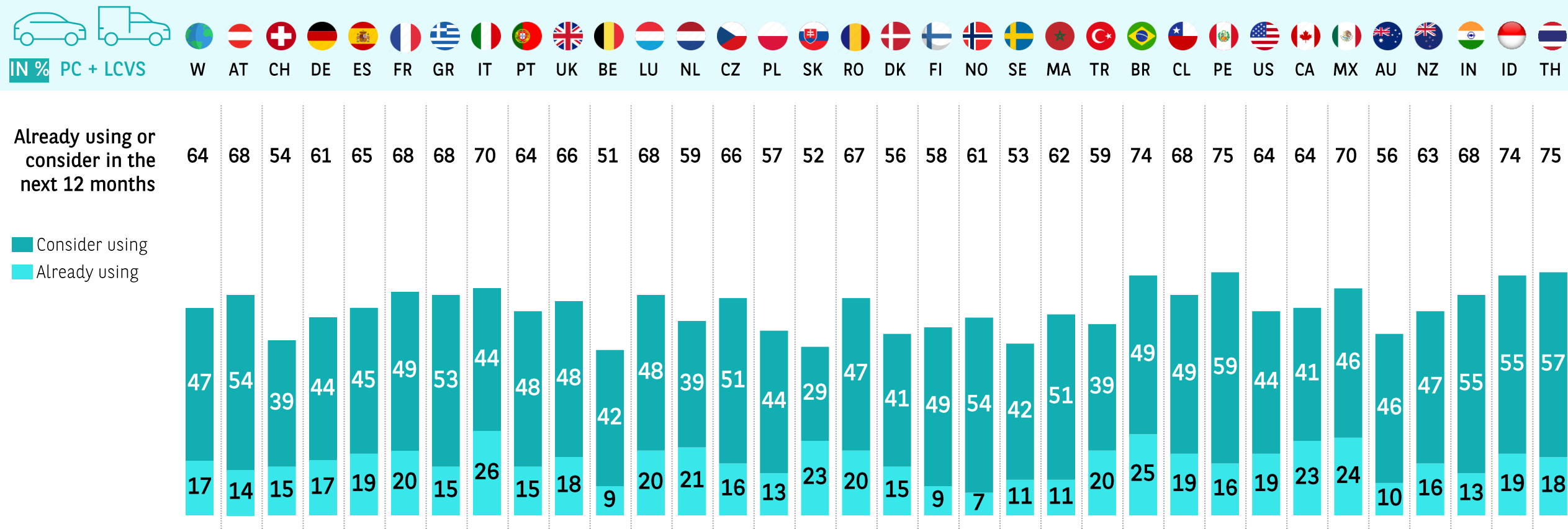
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
Basis: companies with connected vehicles thanks to a telematic tool

X% Significantly higher / lower vs. previous wave

PROPORTION OF COMPANIES USING DATA COMING FROM TELEMATICS

HOW TO READ THE RESULTS ?

In Romania in 2026, 67% of the companies with connected vehicles are already using the data coming from the vehicle box thanks to a telematics platform or are considering doing so in the next 3 years.



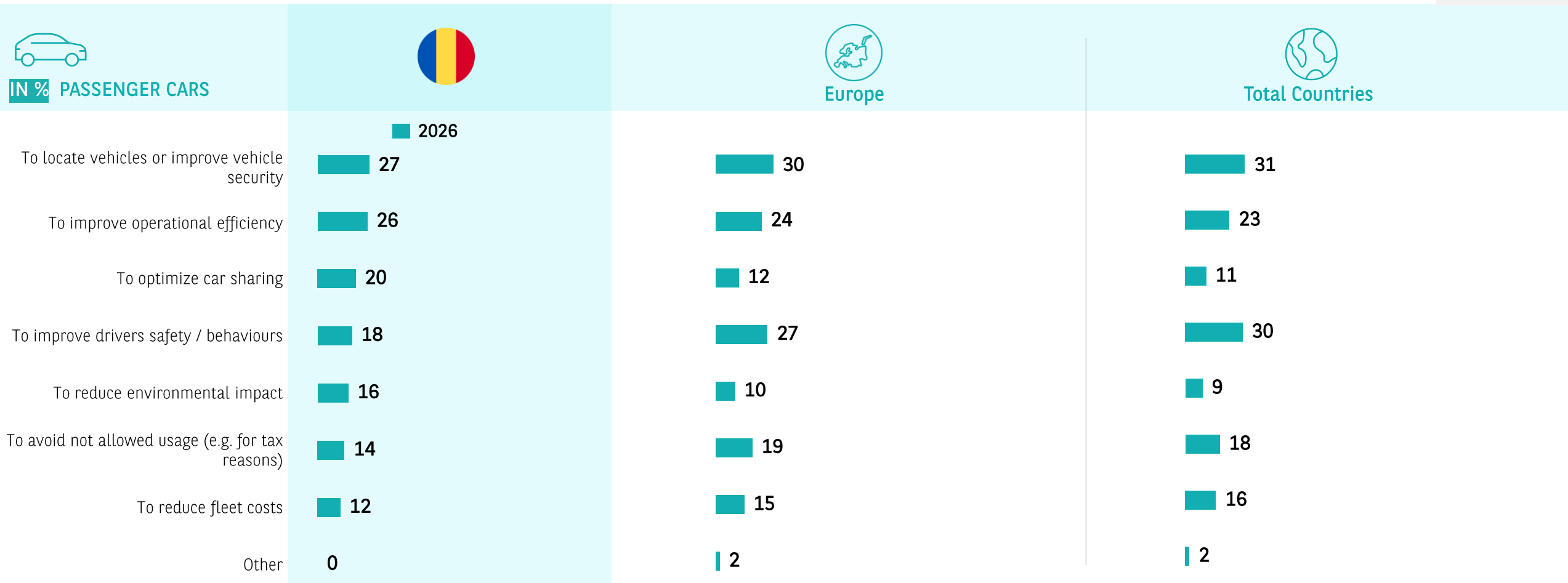
E23d. Do you use or consider using the data coming from the vehicle box thanks to a telematics platform ?
 Basis: companies with connected vehicles thanks to a telematic tool

REASONS FOR USING TELEMATICS DATA FOR PASSENGER CARS

HOW TO READ THE RESULTS ?

In Romania in 2026, 27% of the companies that are already using data or considering doing so, declare that the main reason to use Telematics data for passenger cars is: To locate vehicles or improve vehicle security.

New question



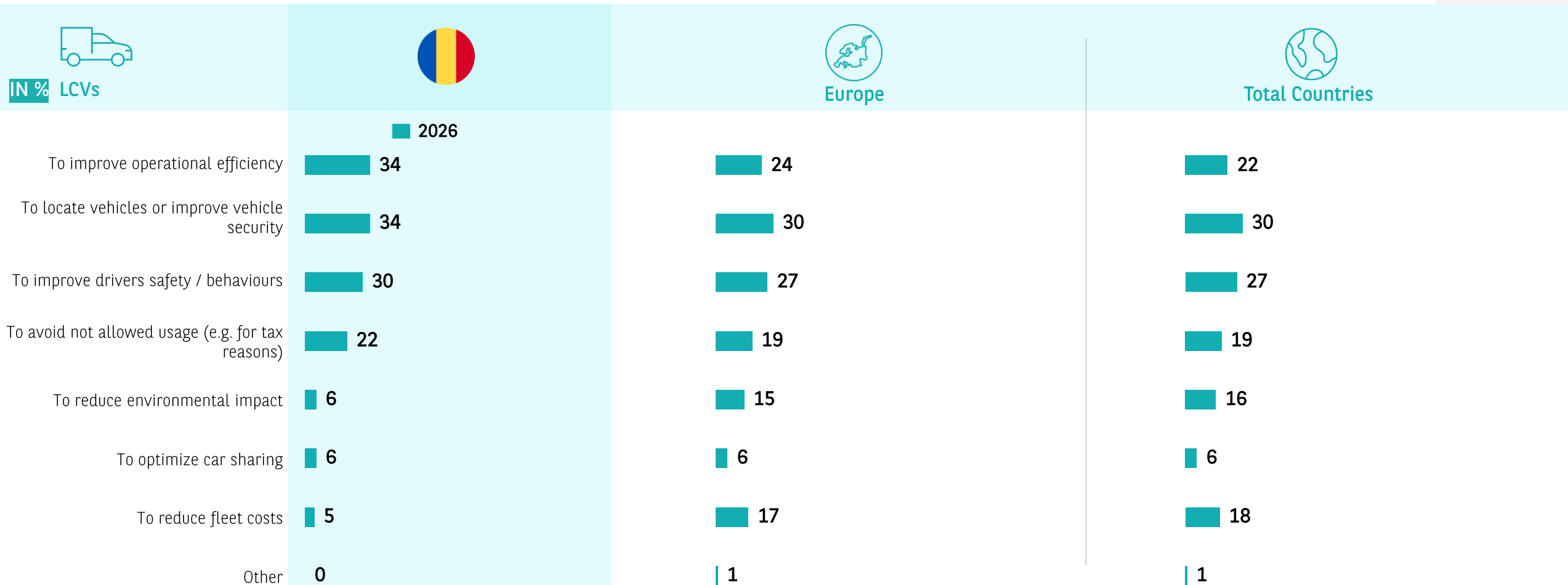
E25AB. What are or would be the two main reasons for you to use telematics data to manage your fleet?
Basis: companies already using data coming from Telematics or considering doing so for passenger cars

REASONS FOR USING TELEMATICS DATA FOR LCVs

HOW TO READ THE RESULTS ?

In Romania in 2026, 34% of the companies that are already using data or considering doing so, declare that the main reason to use Telematics data for passenger cars is: To improve operational efficiency.

New question



E25AB. What are or would be the two main reasons for you to use telematics data to manage your fleet?
Basis: companies already using data coming from Telematics or considering doing so for LCVs

05

EMPLOYEE MOBILITY

What are the perspectives in terms of mobility policies and solutions?



Romanian companies remain committed to corporate mobility policies and solutions

86% of Romanian companies have implemented or are planning to implement at least one mobility policy or solution, with 57% having already implemented at least one, a figure below the European average of 77% following a decrease since 2025 (67%).

Public transport reimbursement and mobility budgets remain the most common mobility policies

Public transport expense reimbursement continues to be the leading mobility policy, with 38% of companies implementing or considering it, followed by mobility budgets at 28%. These figures are stable and align with the European average.

Mobility solutions are less common in Romania yet, with 49% implementation or consideration overall, compared to the European average of 67%.

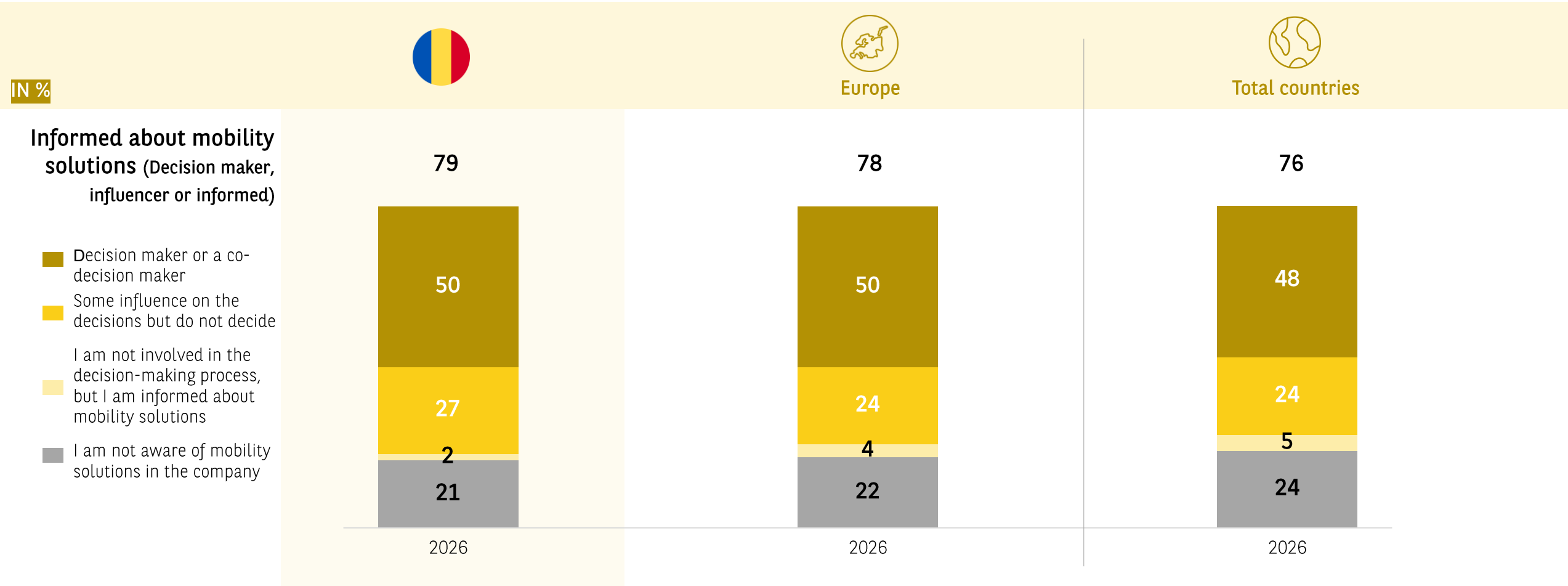
CSR policies and HR-needs continue to drive corporate mobility solutions

In 2026, 44% of Romanian companies are implementing mobility solutions and policies due to CSR considerations, and 42% for HR related needs. 35% do so to anticipate upcoming regulations.

RESPONDENTS' INVOLVEMENT IN MOBILITY SOLUTION DECISIONS

HOW TO READ THE RESULTS ?

In Romania in 2026, 79% of the respondents are informed about mobility solutions.



A12. To what extent are you informed about mobility solutions using other modes of transportation than company cars (such as car sharing , bike sharing etc...)?

Basis: companies with corporate vehicles = 100%

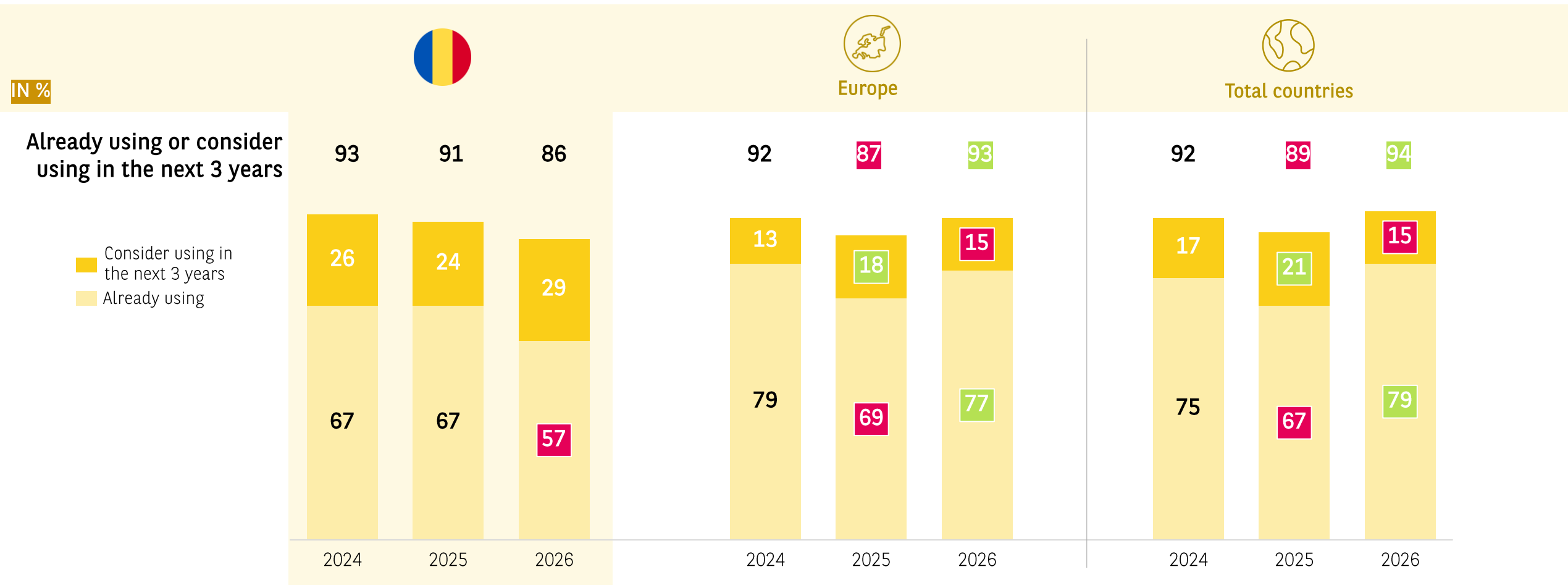


MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

Overall in Romania in 2026, 86% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



MM13/MM15. Which of the following mobility policies / solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

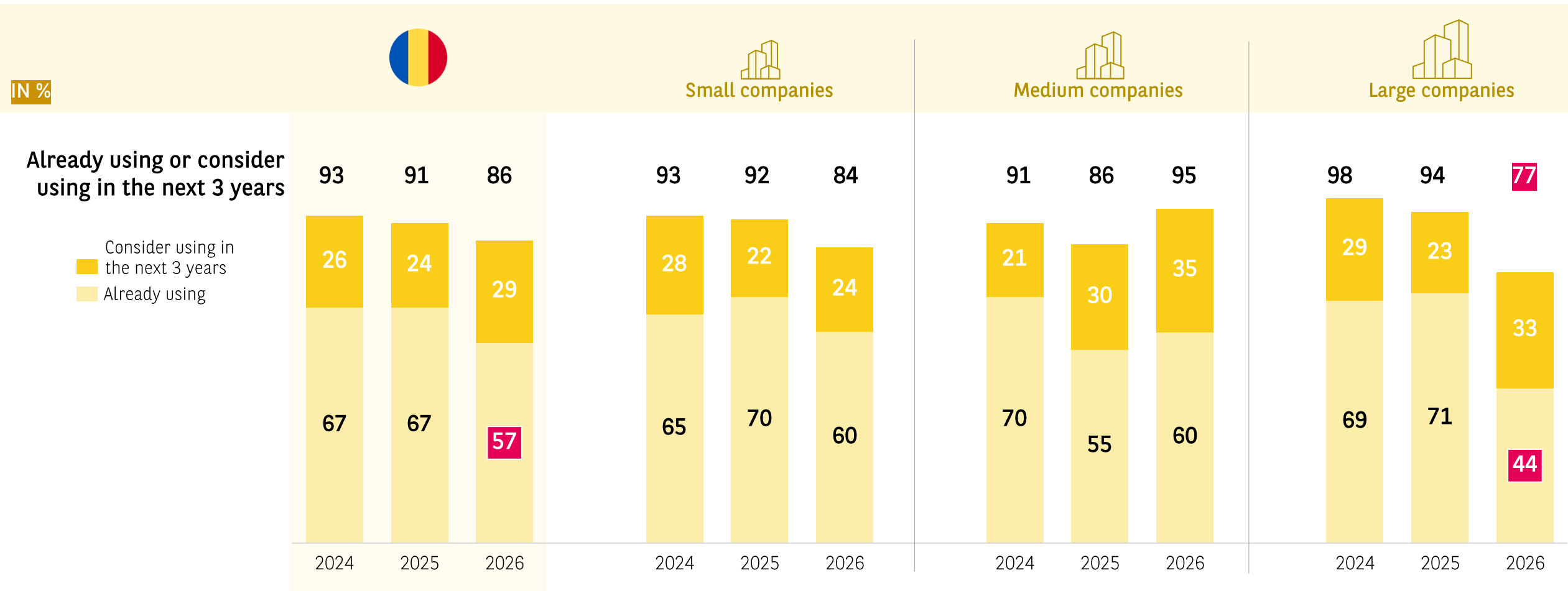
X% Significantly higher / lower vs. previous wave

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

In Romania in 2026, 86% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



MM13/MM15. Which of the following mobility policies / solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

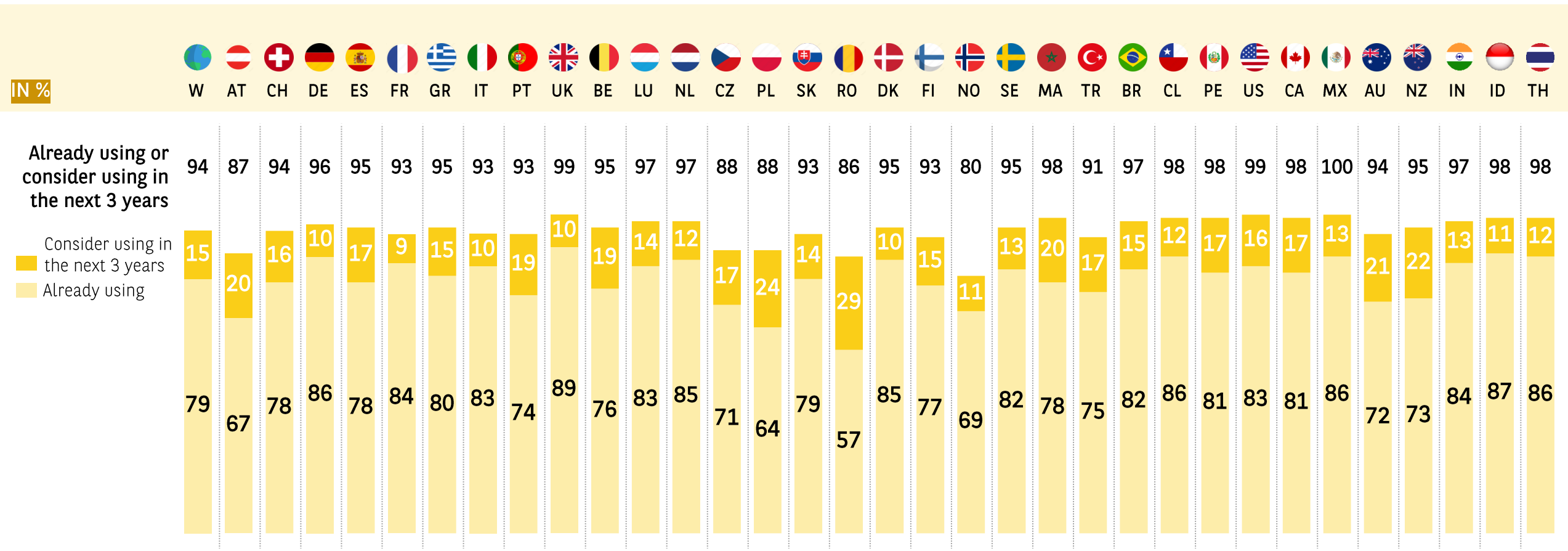
X% Significantly higher / lower vs. previous wave

MOBILITY POLICIES AND SOLUTIONS IMPLEMENTATION

AT LEAST ONE MOBILITY POLICY AND SOLUTION

HOW TO READ THE RESULTS ?

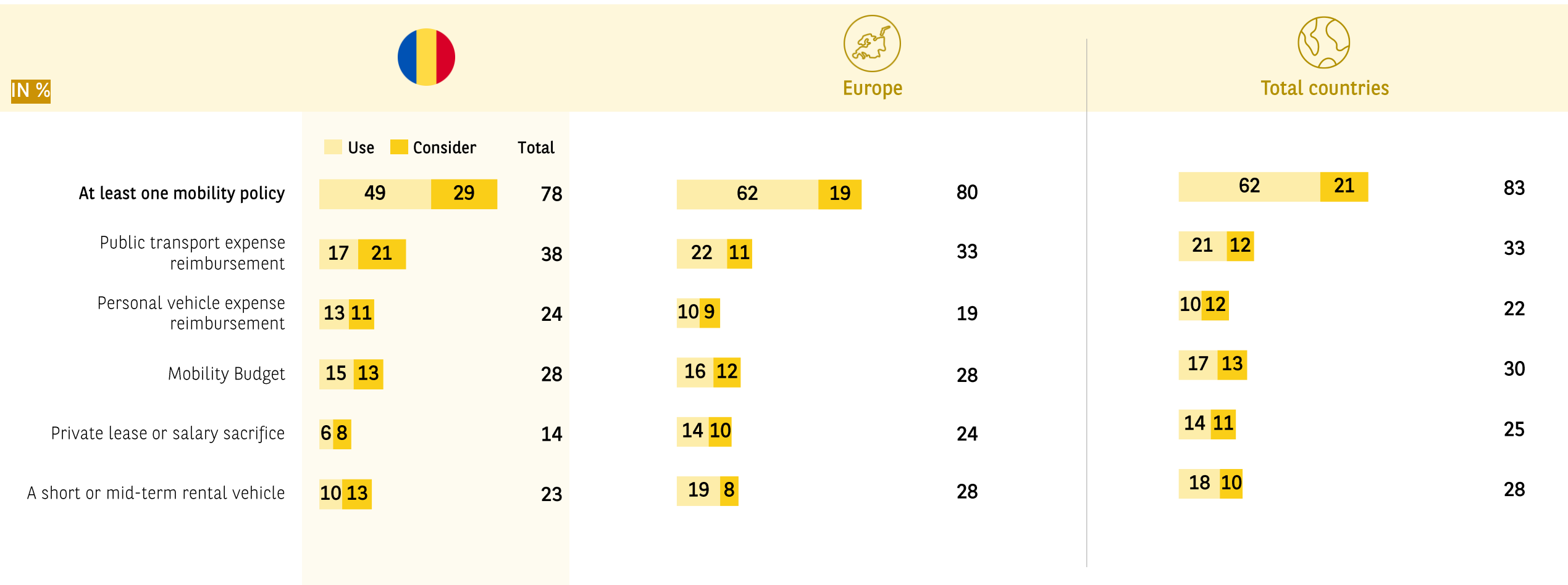
In Romania in 2026, 86% of the companies are already using at least one mobility policy or solution or are considering doing so in the next 3 years.



MM13/MM15. Which of the following mobility policies / solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Romania in 2026, 38% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?

Basis: companies with corporate vehicles = 100%



HOW TO READ THE RESULTS ?

In Romania in 2026, 38% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.



Europe



Total countries

	IN %	2024	2025	2026	2024	2025	2026	2024	2025	2026
Public transport expense reimbursement	Use	21	20	17	23	21	22	21	19	21
	Total (use + consider)	40	39	38	32	33	33	31	32	33
Personal vehicle expense reimbursement	Use		9	13		8	10		8	10
	Total (use + consider)		20	24		16	19		19	22
Mobility Budget	Use	14	20	15	15	16	16	15	15	17
	Total (use + consider)	31	32	28	26	28	28	28	29	30
Private lease or salary sacrifice	Use	8	2	6	15	6	14	13	6	14
	Total (use + consider)	17	10	14	24	13	24	24	15	25
A short or mid term rental vehicle	Use	11	10	10	19	18	19	17	17	18
	Total (use + consider)	25	24	23	28	28	28	27	29	28

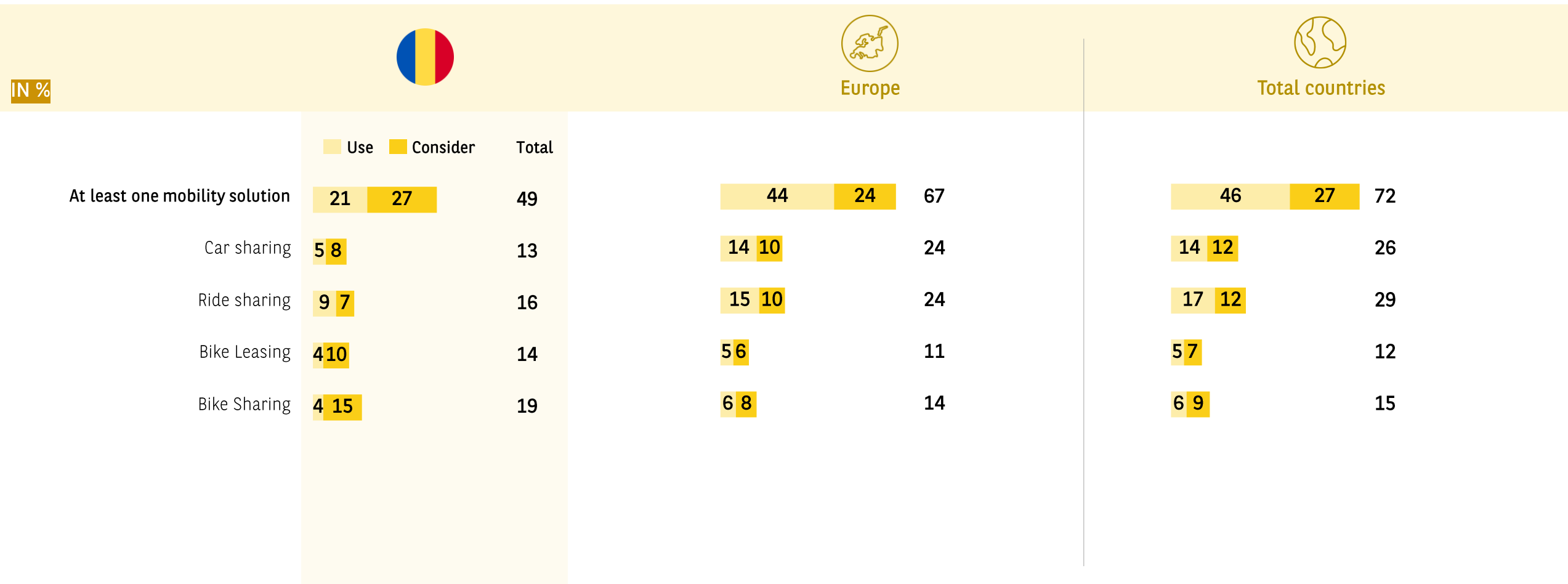
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave



HOW TO READ THE RESULTS ?

In Romania in 2026, 13% of the companies are already using Car sharing or are considering doing so in the next 3 years.



MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?

Basis: companies with corporate vehicles = 100%



HOW TO READ THE RESULTS ?

In Romania in 2026, 13% of the companies are already using Car sharing or are considering doing so in the next 3 years.



Europe



Total countries

	IN %	2024	2025	2026	2024	2025	2026	2024	2025	2026
Car sharing	Use	4	6	5	12	13	14	12	12	14
	Total (use + consider)	12	14	13	21	23	24	23	23	26
Ride sharing or car pooling	Use	17	9	9	18	7	15	19	8	17
	Total (use + consider)	26	21	16	28	16	24	29	19	29
Bike Leasing	Use		5	4		4	5		4	5
	Total (use + consider)		17	14		11	11		12	12
Bike Sharing	Use		6	4		5	6		5	6
	Total (use + consider)		19	19		14	14		15	15

MM15. Which of the following mobility solutions have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

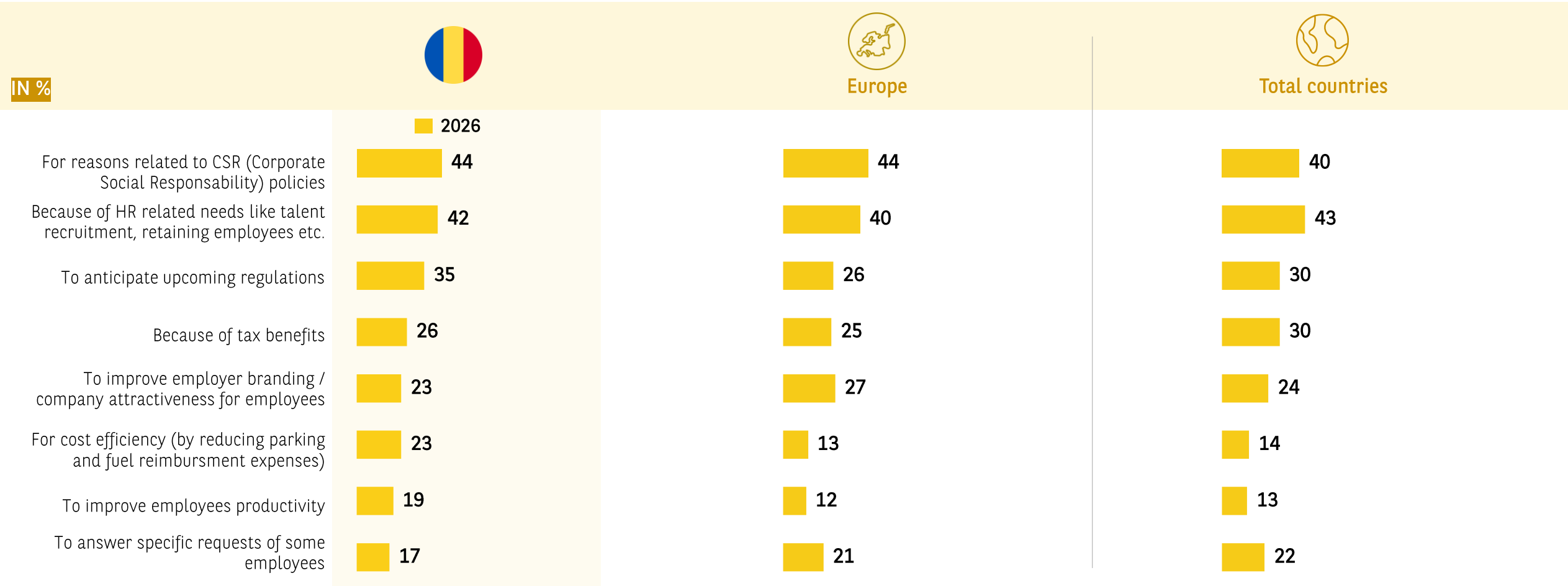
X% Significantly higher / lower vs. previous wave



REASONS FOR IMPLEMENTING MOBILITY SOLUTIONS & POLICIES

HOW TO READ THE RESULTS ?

In Romania in 2026, 44% of the companies declare that the main reason for introducing mobility solutions & policies is: For reasons related to CSR (Corporate Social Responsibility) policies.



MM16. For what reasons has your company introduced, or does your company intend to introduce, these mobility solutions and policies?
Basis: companies using or considering at least one mobility solution or policy

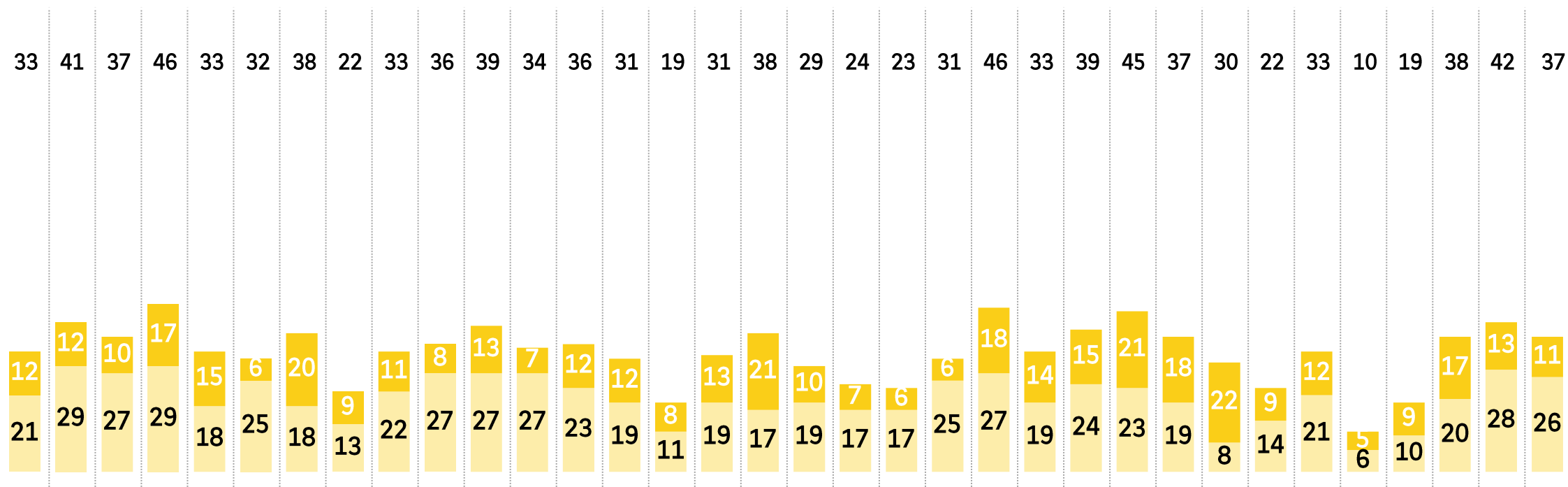


PUBLIC TRANSPORT EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

In Romania in 2026, 38% of the companies are already using Public transport expense reimbursement or are considering doing so in the next 3 years.

IN %



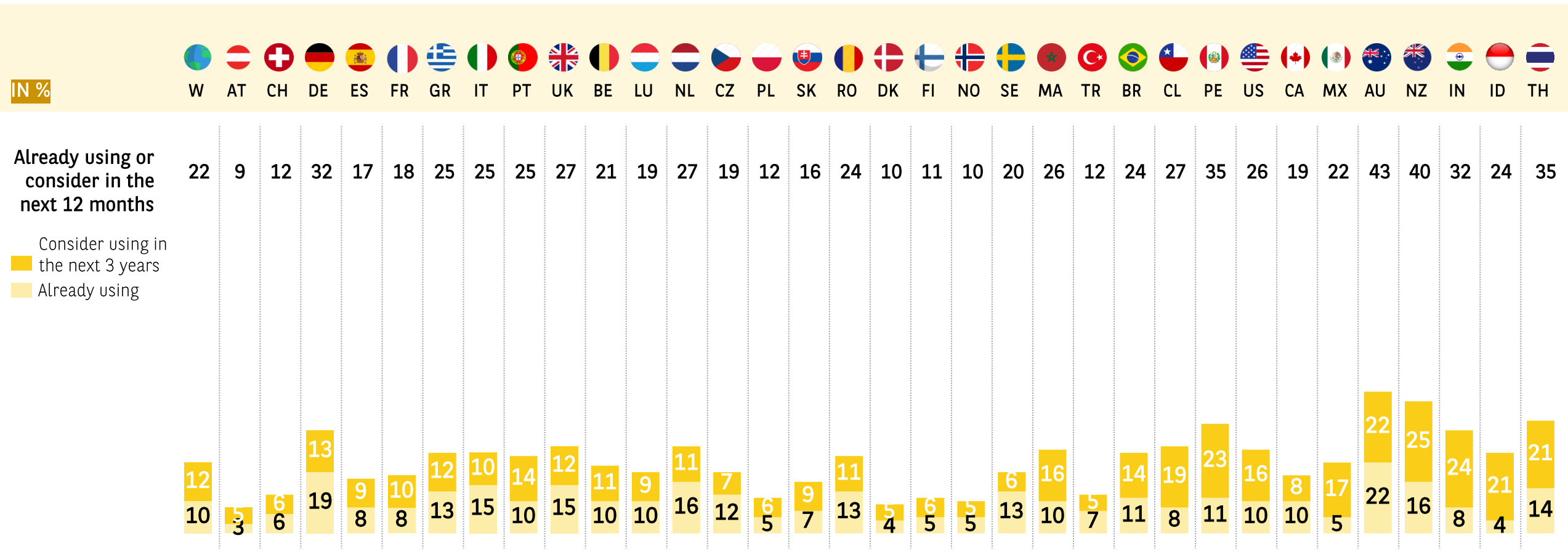
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%



PERSONAL VEHICLE EXPENSE REIMBURSEMENT

HOW TO READ THE RESULTS ?

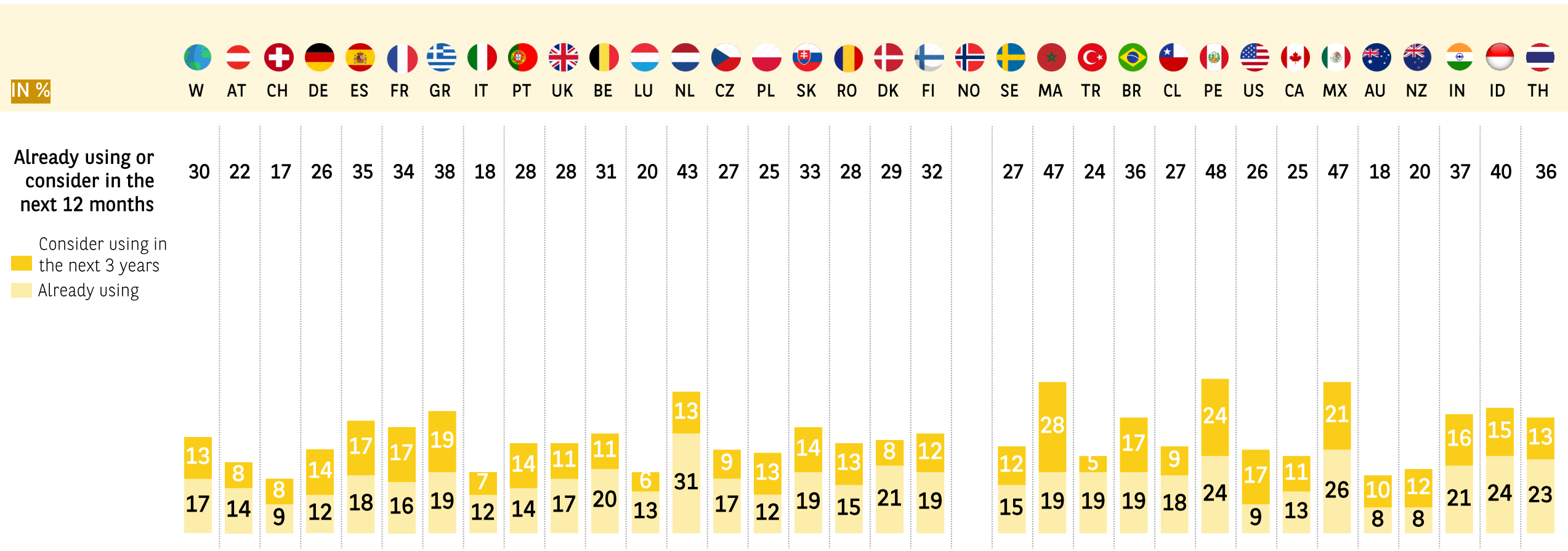
In Romania in 2026, 24% of the companies are already using Personal vehicle expense reimbursement or are considering doing so in the next 3 years.



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

In Romania in 2026, 28% of the companies are already using Mobility Budget or are considering doing so in the next 3 years.



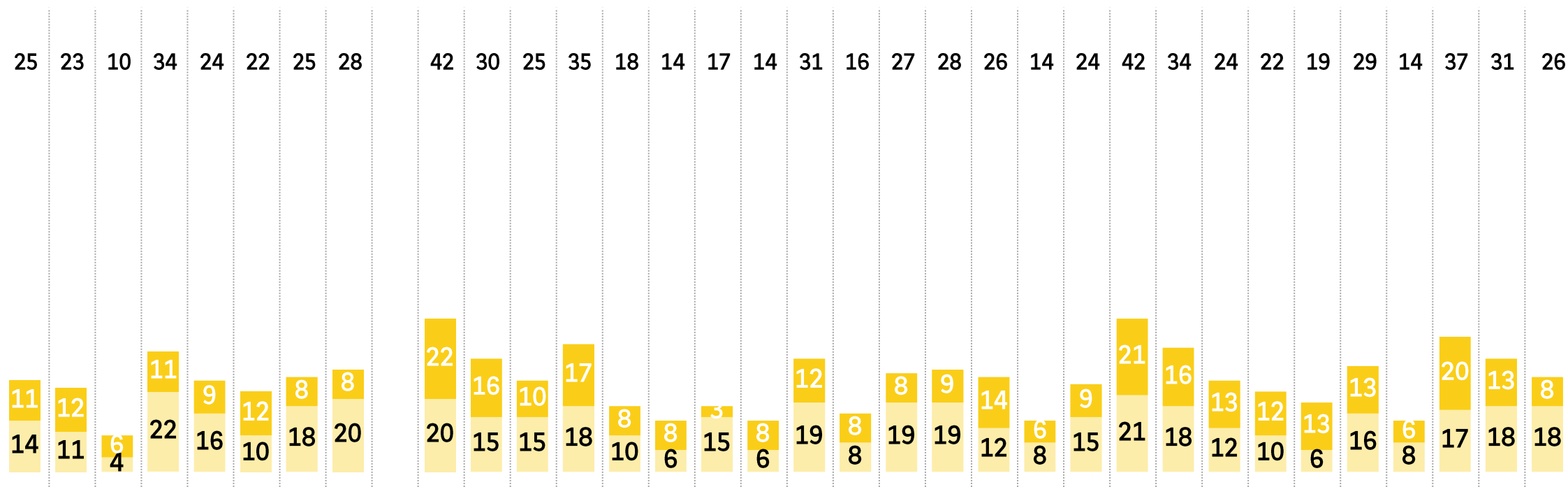
MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

PRIVATE LEASE OR SALARY SACRIFICE

HOW TO READ THE RESULTS ?

In Romania in 2026, 14% of the companies are already using Private lease or salary sacrifice or are considering doing so in the next 3 years.

IN %



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

SHORT OR MID TERM RENTAL VEHICLE

HOW TO READ THE RESULTS ?

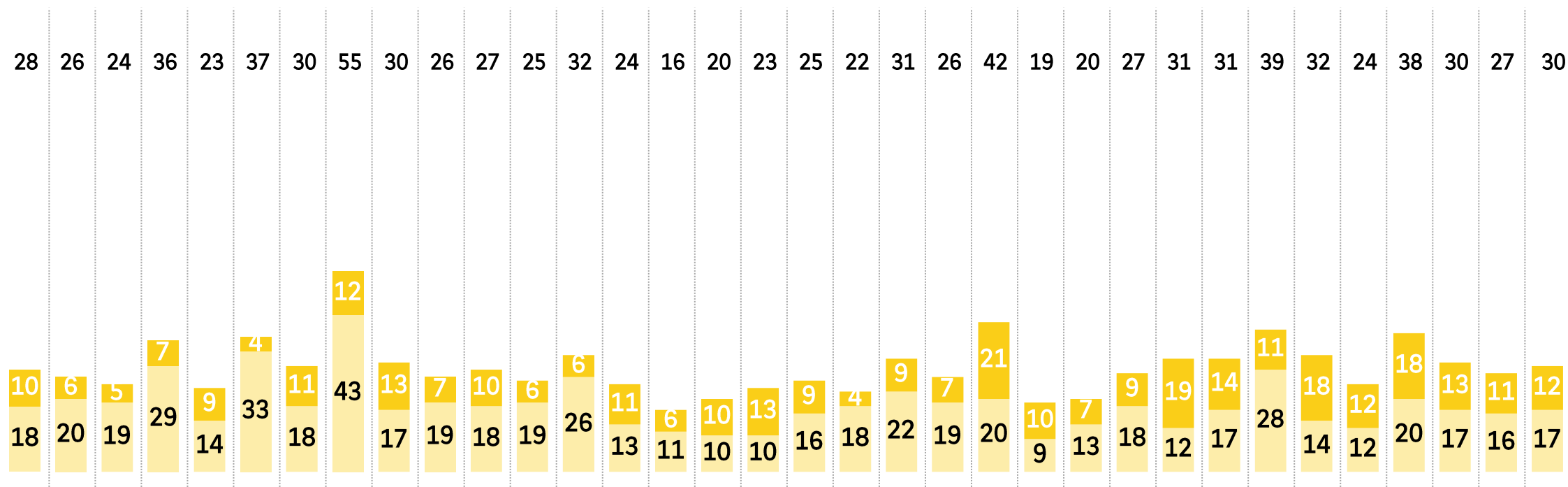
In Romania in 2026, 23% of the companies are already using short or mid term rental vehicle or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



MM13. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

CAR SHARING / POOLED VEHICLES

HOW TO READ THE RESULTS ?

In Romania in 2026, 13% of the companies are already using Car sharing / pooled vehicles or are considering doing so in the next 3 years.

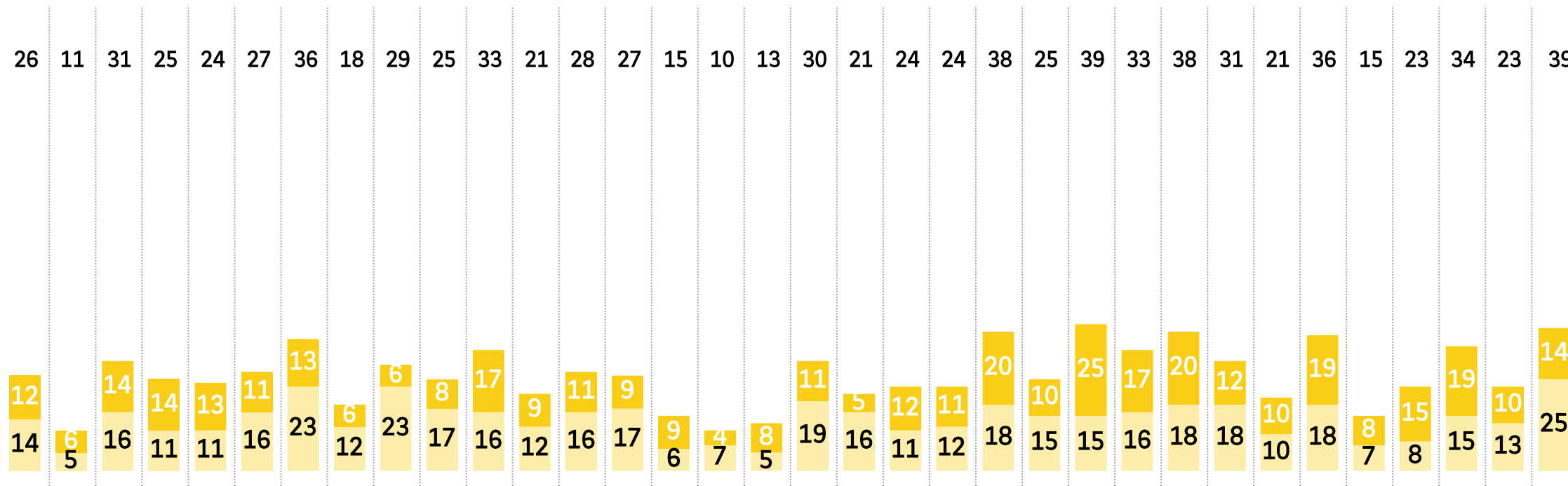
IN %



W AT CH DE ES FR GR IT PT UK BE LU NL CZ PL SK RO DK FI NO SE MA TR BR CL PE US CA MX AU NZ IN ID TH

Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?

Basis: companies with corporate vehicles = 100%



RIDE SHARING / CARPOOLING

HOW TO READ THE RESULTS ?

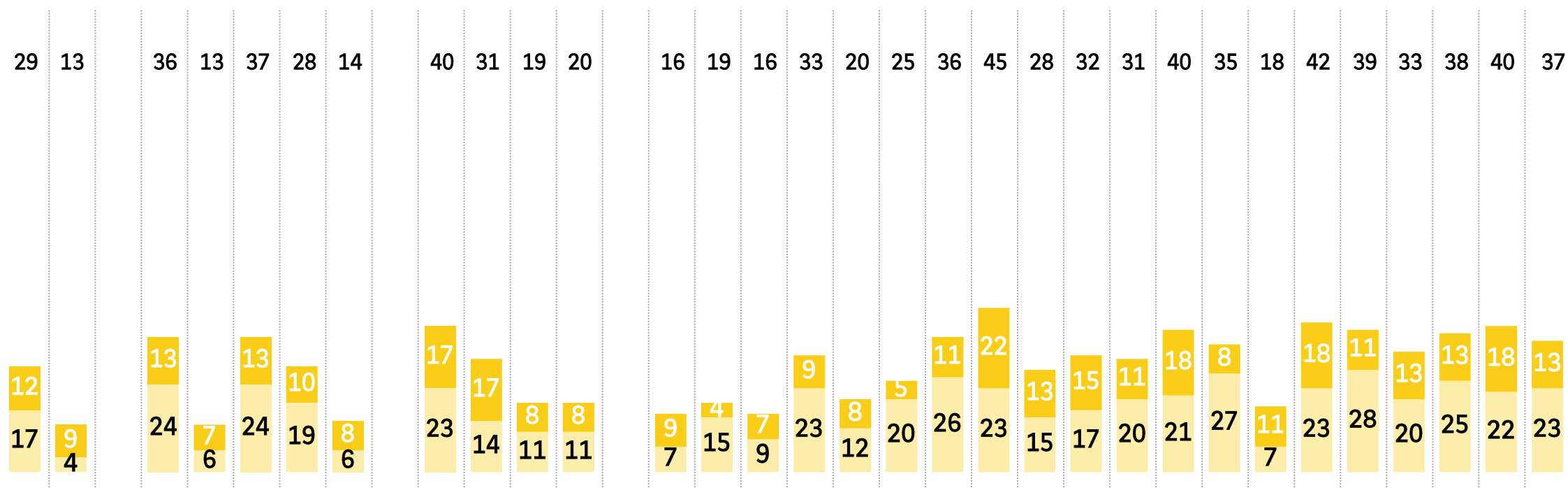
In Romania in 2026, 16% of the companies are already using Ride sharing / carpooling or are considering doing so in the next 3 years.

IN%



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

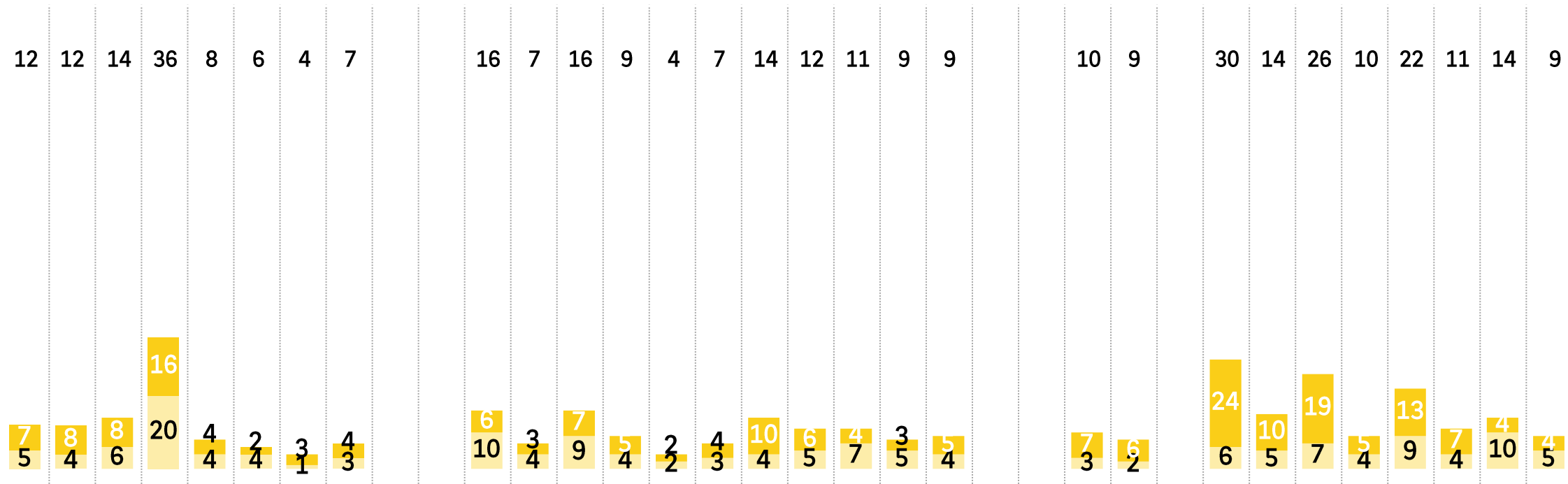
In Romania in 2026, 14% of the companies are already using Bike leasing or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

HOW TO READ THE RESULTS ?

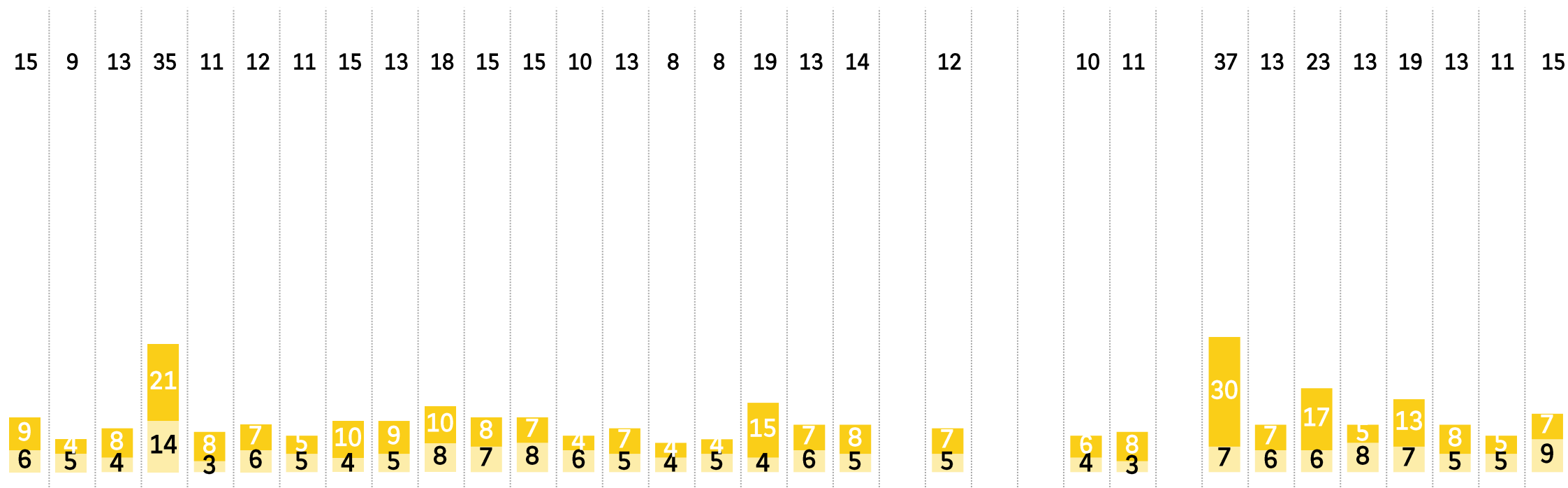
In Romania in 2026, 19% of the companies are already using Bike sharing or are considering doing so in the next 3 years.

IN %



Already using or consider in the next 12 months

Consider using in the next 3 years
Already using



MM15. Which of the following mobility policies have you implemented or are you considering implementing in the next 3 years?
Basis: companies with corporate vehicles = 100%

06

FUTURE CHALLENGES

What are the future challenges for fleet management in the coming years?



Decarbonization goals in Romanian companies are still implemented with limited scope

Only 9% of companies in Romania have set targeted decarbonization goals, and 27% are currently evaluating them. Among large companies, only 4% have implemented such goals, but 39% are considering doing so.

20% of Romanian companies state that the contribution of employee mobility to their decarbonization targets is significant, 40% viewing it as a moderate contributor, aligning with the European level.

Adapting to restrictive ICE policies and implementing electrification remain the primary challenges for fleet managers, alongside the growing challenge of promoting more responsible driving

The top challenges include adapting to restrictive ICE policies (41%) and implementing alternative energy technologies (41%). Meanwhile, promoting responsible driving has become more challenging (35% compared to 27% in 2025), and mitigating the increase in total cost of ownership (TCO) has become less challenging (23% compared to 31%).

Romanian managers are in demand of innovative solutions for future fleet enhancements

47% of Romanian fleet managers claim they would need help in terms of fleet performance management, and more specifically they would need:

- Automated vehicle performance monitoring and predictive maintenance (21%)
- Fuel consumption monitoring and optimization (14%)
- Cost control and financial oversight of fleet operations (12%)
- An all-in-one fleet management software / platform (12%)

They would also need help in logistics and fleet operations management (30%):

- Route and delivery optimization (17%)
- Fleet allocation, operations coordination and optimization (16%)

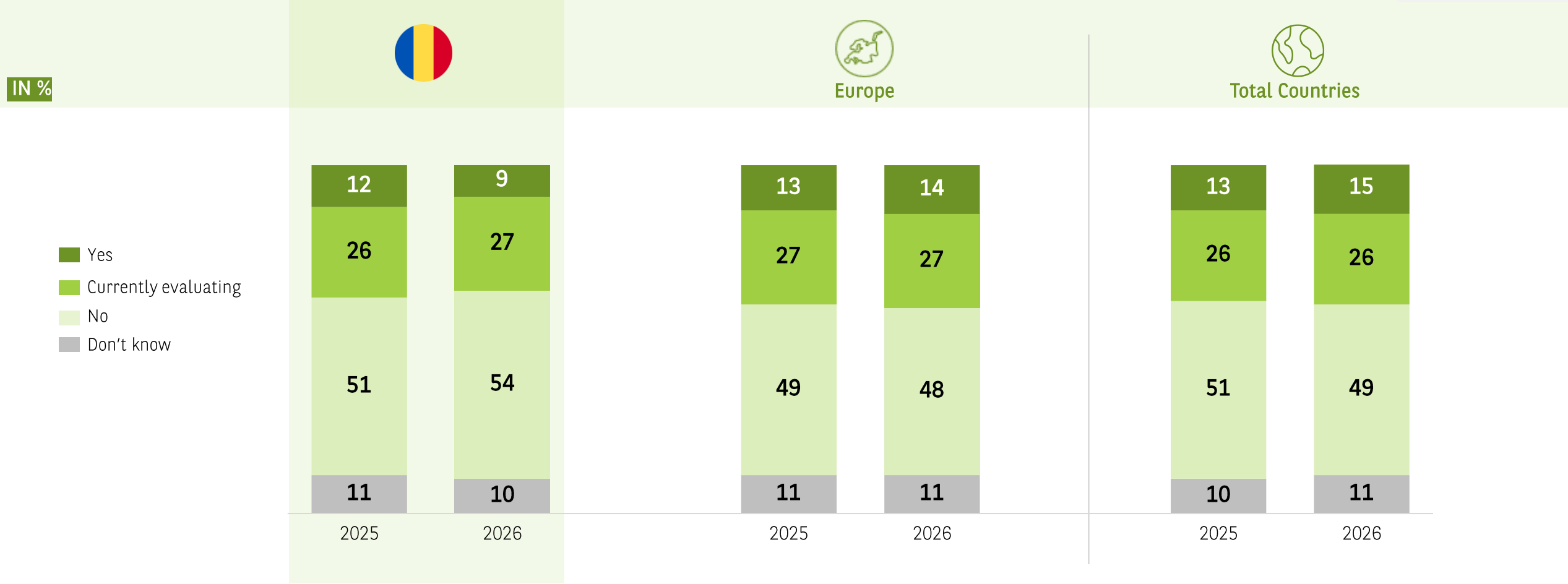
21% would also need vehicles real-time tracking and monitoring.

DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Romania in 2026, 9% of the companies have targeted decarbonization goals.

Change of question



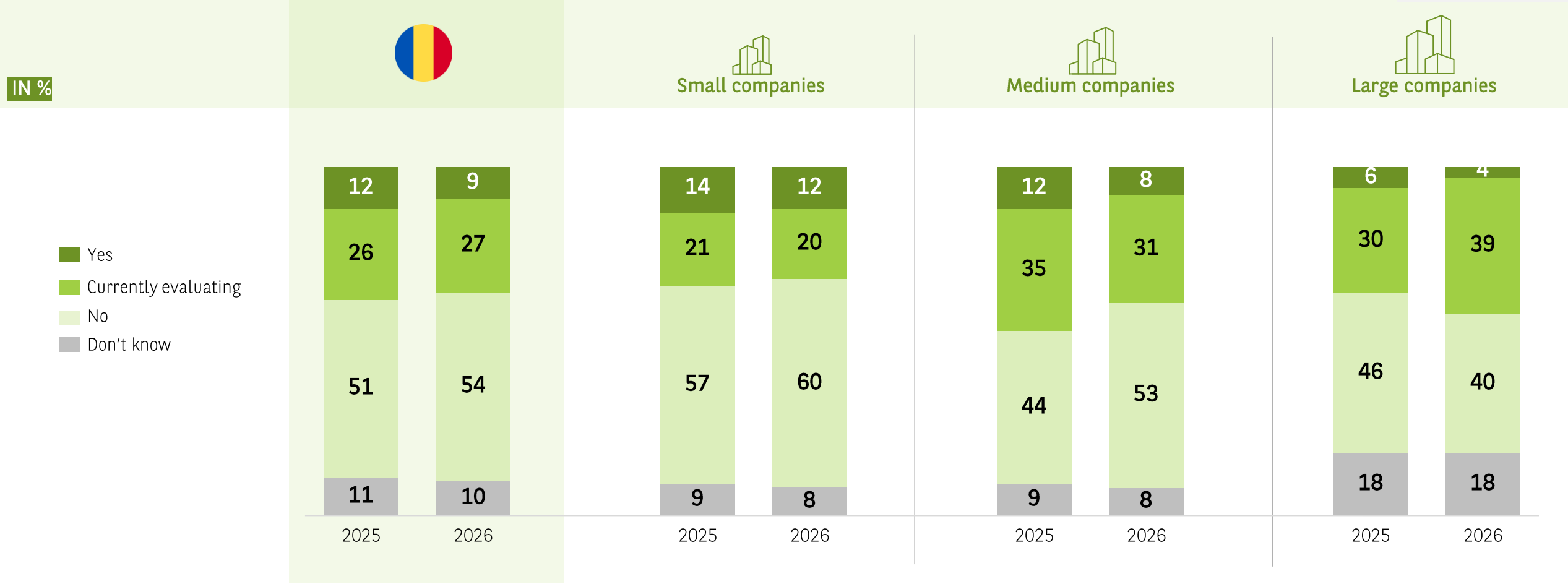
A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%

DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Romania in 2026, 9% of the companies have targeted decarbonization goals.

Change of question



A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%

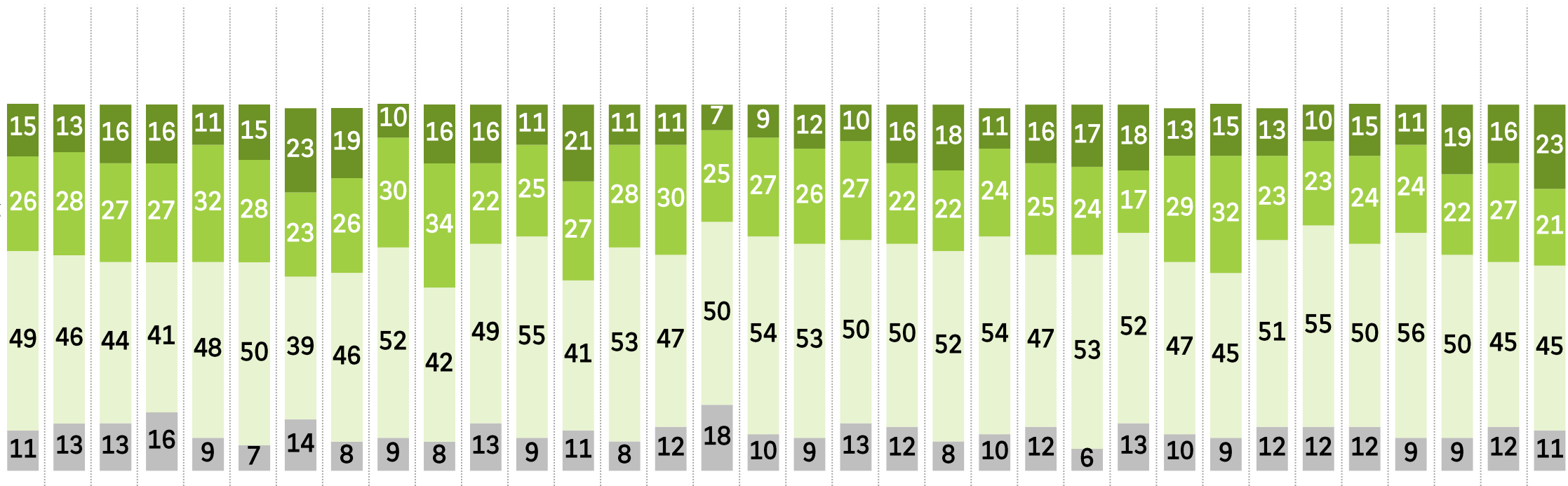
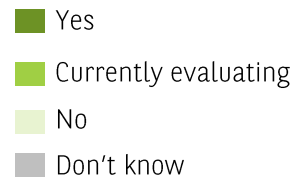
DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Romania in 2026, 9% of the companies have targeted decarbonization goals.

Change of question

IN %



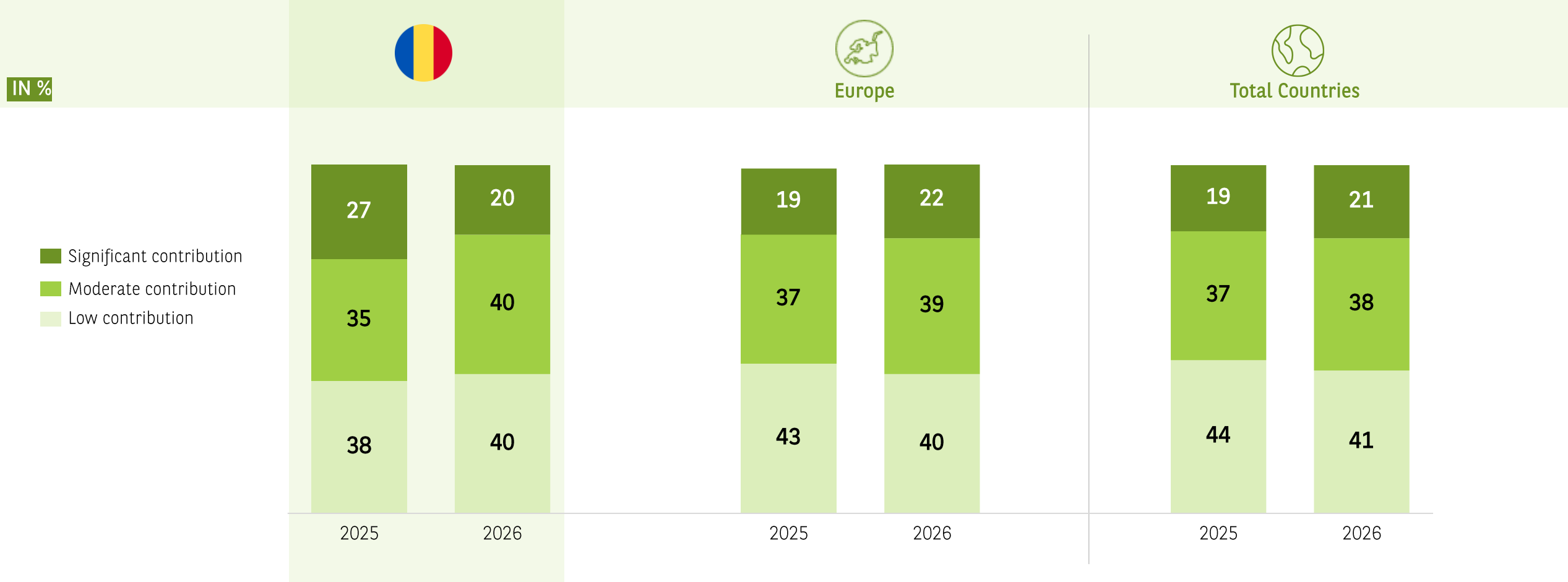
A56. Does your organization have targeted decarbonization goals? It is not limited to fleet, for instance "Net 0"
Basis: companies with corporate vehicles = 100%



IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

HOW TO READ THE RESULTS ?

In Romania in 2026, 20% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.



A57. How would you rate the contribution of employees' mobility in these decarbonization targets?
Basis: companies that have targeted decarbonization goals

IMPORTANCE OF EMPLOYEE'S MOBILITY TO DECARBONIZATION GOALS

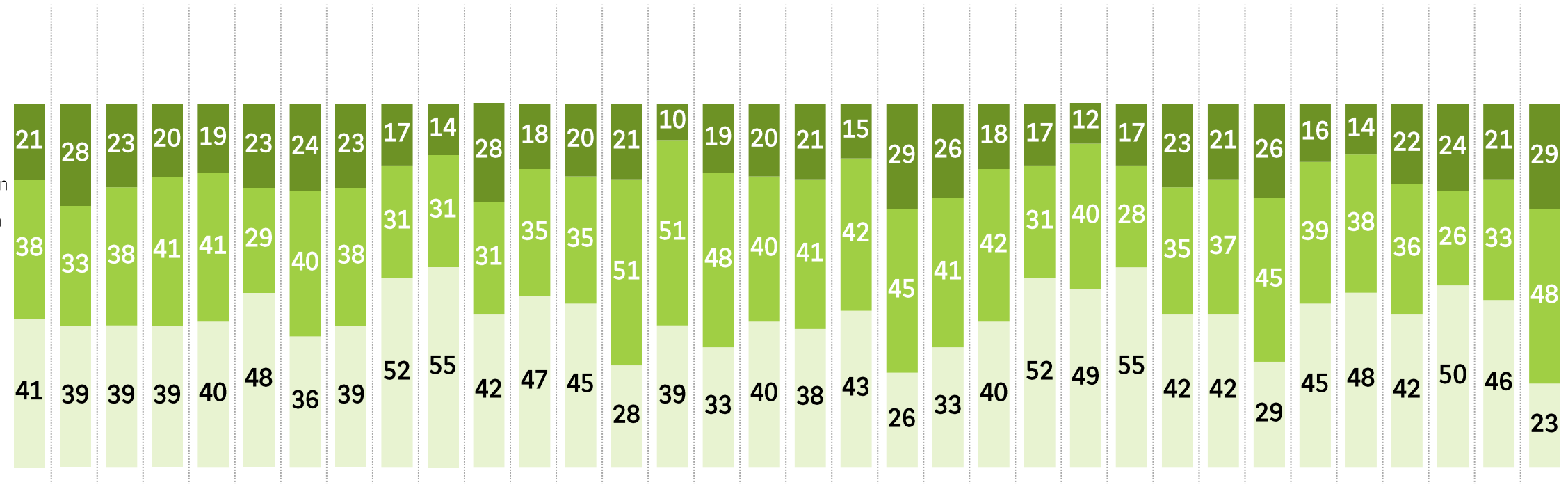
HOW TO READ THE RESULTS ?

In Romania in 2026, 20% of the companies that have targeted decarbonization goals rate the contribution of employee's mobility in these decarbonization targets as significant contribution.

IN %



Significant contribution
 Moderate contribution
 Low contribution



A57. How would you rate the contribution of employees' mobility in these decarbonization targets?
 Basis: companies that have targeted decarbonization goals

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Romania in 2026, 41% of the companies declare that Adapting to restrictive public policies on ICE is in the top 3 challenges for fleet management in the next 3 years.



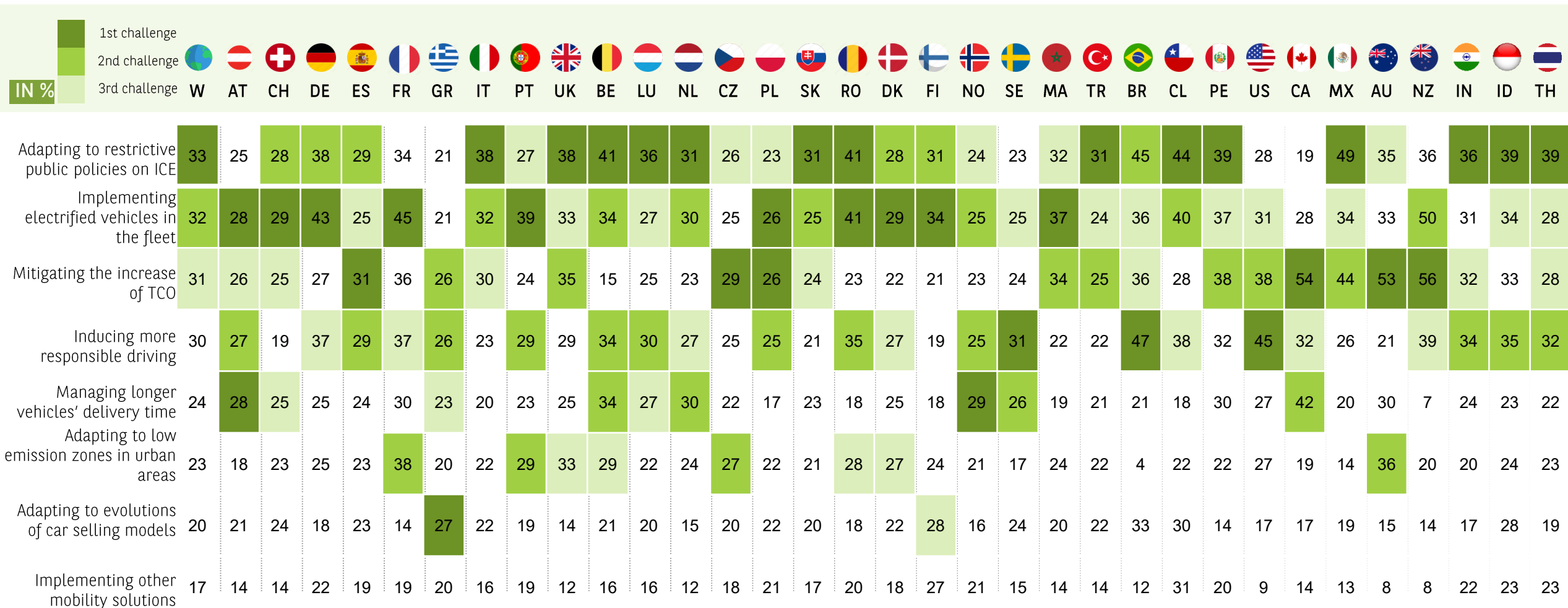
A11. According to you, what will be the three main challenges for fleet management in the next 3 years?
Basis: companies with corporate vehicles = 100%

X% Significantly higher / lower vs. previous wave

THREE MAIN CHALLENGES FOR FLEET MANAGEMENT IN THE N3Y

HOW TO READ THE RESULTS ?

In Romania in 2026, 41% of the companies declare that Adapting to restrictive public policies on ICE is in the top 3 challenges for fleet management in the next 3 years.






A11. According to you, what will be the three main challenges for fleet management in the next 3 years?
Basis: companies with corporate vehicles = 100%

OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

In Romania in 2026, 21% of the respondents declare that Automated vehicle performance monitoring and predictive maintenance would help them as a fleet manager.

New question

IN %		 Europe	 Total Countries
Fleet performance management	47%	43%	44%
Automated vehicle performance monitoring and predictive maintenance	21%	17%	18%
Fuel consumption monitoring and optimization	14%	13%	13%
Cost control and financial oversight of fleet operations	12%	11%	11%
An all-in-one fleet management software / platform	12%	14%	14%
Logistics and fleet operations management	30%	26%	27%
Route and delivery optimization	17%	14%	15%
Fleet allocation, operations coordination and optimization	16%	13%	14%
Intelligent cargo and load optimization	3%	2%	2%
Driver and safety	26%	21%	21%
Vehicles real-time tracking and monitoring	21%	17%	17%
Driver management and safety standards implementation	3%	3%	3%
Fleet security and protection systems	3%	2%	2%
Administrative & Compliance	6%	9%	9%
Centralizing and digitizing fleet documentation	5%	7%	7%
Proactive compliance deadline management	1%	2%	2%
Environment & Sustainability	3%	5%	5%
Support for the adoption and management of electric vehicles	1%	2%	2%
Tools and practices for a sustainable fleet management	1%	2%	2%
Vehicle emissions monitoring	1%	2%	2%
Others	20%	23%	22%
Other	17%	21%	20%
Enhanced refrigerated vehicles	2%	2%	2%

A13. From your personal perspective, what would help you with your daily tasks as a fleet manager and enable you to manage your fleet more effectively?

Basis: companies with corporate vehicles = 100%

Administrative & Compliance	Proactive compliance deadline management (insurance, inspections, licenses, regulatory requirements)	Proactive reminder systems that notify users about upcoming insurance renewals, vehicle inspection dates, license expirations, and regulatory requirement deadlines. Fleet managers seek integrated platforms that reduce manual tracking burden and prevent costly lapses in compliance coverage.
	Centralizing and digitizing fleet documentation (insurances, maintenance, invoices)	Automated systems that can store, organize, and manage vehicle-related documentation (insurance papers, maintenance records, invoices, and inspection certificates). It reduces paperwork burden through digital transformation, provides automatic reminders for important deadlines, and centralizes all fleet documentation in easily accessible platforms.
Driver and safety	Driver management and safety standards implementation	Solutions that help monitor and improve driver performance, facilitate driver scheduling and shift management, and implement safety measures to prevent accidents and ensure secure transportation. It encompasses training programs for safe driving practices, telematics systems for real-time monitoring of driver behavior, safety equipment installation (cameras, sensors), and management platforms that provide comprehensive oversight of driver activities.
	Fleet security and protection systems	Anti-theft systems (remote locking, immobilizers), cargo and equipment protection during transport, driver and vehicle monitoring through dashcams and telematics, and access control systems (badges, PIN codes). It encompasses both preventive security measures and real-time monitoring capabilities.
	Vehicles real-time tracking and monitoring	GPS tracking systems, telematics platforms, fleet monitoring software, sensor-based condition monitoring, and integrated management dashboards that provide instant oversight of vehicle utilization.
Environment & Sustainability	Support for the adoption and management of electric vehicles	Electric vehicle adoption support, including battery performance monitoring, charging infrastructure access, and specialized training for electric vehicle operation. It includes tools that help evaluate the cost-effectiveness of switching from traditional to electric vehicles. Fleet managers seek both the technology and knowledge needed to successfully implement sustainable transportation solutions while reducing operational costs and environmental impact.
	Tools and practices for a sustainable fleet management	Tools and technologies that help track carbon footprint, implement sustainable driving practices, and transition to electric fleets. It encompasses solutions such as eco-driving training programs, fleet electrification support services...
	Vehicle emissions monitoring	Measurement tools, sensors, and diagnostic systems that can track vehicle pollution levels, alert when emissions exceed acceptable limits, and support decision-making for fleet renewal.



Fleet performance management	An all-in-one fleet management software / platform	Centralized dashboards that provide real-time visibility into fleet performance, costs, maintenance, and operations through customizable reporting and analytics. An all-in-one management software that combines data from various sources (telematics, maintenance, fuel consumption, scheduling) into easy-to-understand visual displays.
	Automated vehicle performance monitoring and predictive maintenance	Automated systems / platforms that continuously monitor vehicle conditions, performance, component status, and maintenance schedules while delivering real-time alerts and notifications to prevent unexpected breakdowns and optimize fleet operations. It means transitioning from reactive maintenance approaches to predictive, data-driven strategies.
	Cost control and financial oversight of fleet operations	Digital platforms and management systems that track fleet-related expenses (fuel costs, maintenance expenses, insurance costs, overall operational spending) and provide detailed cost breakdowns, expense forecasting, budget management capabilities. It encompasses solutions ranging from fuel card management systems and maintenance cost scheduling to comprehensive financial dashboards that enable total cost of ownership calculations and cost-reduction strategies across the entire fleet.
	Fuel consumption monitoring and optimization	Automated tracking systems that provide real-time fuel data, consumption reports, and alerts to identify inefficiencies or anomalies. Fleet managers seek solutions that combine both technological solutions (sensors, automated reporting systems, dashboards) and strategic approaches (driver education, route planning).
Logistics and fleet operations management	Fleet allocation, operations coordination and optimization	Tools that streamline vehicle allocation, coordinate driver assignments, track fleet status and availability, and improve overall transport efficiency. Fleet managers seek integrated systems that can automate scheduling, provide real-time fleet visibility, optimize resource utilization, and facilitate better communication between dispatchers and drivers. It encompasses solutions ranging from vehicle tracking and maintenance management to intelligent dispatch systems and automated shift planning tools.
	Intelligent cargo and load optimization	Systems that can monitor vehicle capacity, optimize loading based on cargo volume and destination, and track load conditions in real-time including specialized monitoring for fragile or sensitive cargo. The focus is on maximizing efficiency by reducing unnecessary trips, ensuring optimal vehicle utilization throughout the transportation process, and maintaining cargo integrity through intelligent monitoring of transport conditions.
	Route and delivery optimization	Digital tools and software that can plan optimal routes, track vehicles in real-time, manage delivery schedules, and coordinate logistics operations. Fleet managers seek integrated platforms that combine route planning with performance monitoring and predictive capabilities to minimize delays and reduce costs. It encompasses solutions ranging from AI-powered route optimization software and GPS tracking systems to centralized management platforms that coordinate vehicles, equipment, and personnel for improved delivery performance.
Others	Enhanced refrigerated vehicles	Refrigerated vehicles equipped with real-time temperature monitoring systems, sensors that track climate conditions, and automated alert mechanisms to prevent cold chain interruptions.
	Others	Minor topics that have not been assigned to the code frame.





VERBATIM FOR TOP 3 TOPICS

Automated vehicle performance monitoring and predictive maintenance

21%

Vehicles real-time tracking and monitoring

21%

Route and delivery optimization

17%



"Integrating advanced monitoring systems for predictive vehicle maintenance, which can detect anomalies early and reduce the risk of failures"

"Real-time vehicle tracking to monitor the status of deliveries would be of great help"

"A system that tracks vehicle usage between factories and construction sites in real time, so I can optimize routes and reduce operating costs"

A13. From your personal perspective, what would help you with your daily tasks as a fleet manager and enable you to manage your fleet more effectively?
Basis: companies with corporate vehicles = 100%

OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

In Romania in 2026, 21% of the respondents declare that Automated vehicle performance monitoring and predictive maintenance would help them as a fleet manager.

New question

IN %



	W	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE
Fleet performance management	44%	41%	47%	45%	44%	46%	39%	36%	48%	46%	41%	40%	42%	45%	38%	40%	47%	45%	41%	43%	43%
Automated vehicle performance monitoring and predictive maintenance	18%	16%	16%	17%	17%	17%	13%	14%	16%	21%	17%	14%	18%	21%	17%	18%	21%	15%	18%	18%	16%
Fuel consumption monitoring and optimization	13%	14%	12%	10%	13%	14%	14%	11%	20%	14%	11%	12%	14%	12%	11%	14%	14%	15%	9%	10%	13%
Cost control and financial oversight of fleet operations	11%	9%	12%	10%	11%	14%	7%	11%	15%	13%	12%	12%	8%	9%	10%	8%	12%	15%	14%	12%	10%
An all-in-one fleet management software / platform	14%	12%	18%	18%	17%	18%	15%	9%	13%	14%	15%	15%	11%	12%	10%	12%	12%	16%	11%	15%	11%
Logistics and fleet operations management	27%	24%	23%	23%	27%	31%	21%	29%	26%	29%	28%	26%	23%	23%	25%	29%	30%	27%	34%	24%	27%
Route and delivery optimization	15%	15%	11%	12%	14%	19%	11%	15%	12%	13%	15%	16%	11%	13%	15%	16%	17%	14%	19%	12%	15%
Fleet allocation, operations coordination and optimization	14%	10%	12%	13%	13%	14%	9%	13%	14%	15%	13%	13%	12%	14%	11%	12%	16%	14%	17%	13%	14%
Intelligent cargo and load optimization	2%	2%	2%	1%	4%	2%	2%	4%	1%	4%	3%	1%	3%	1%	2%	3%	3%	2%	3%	2%	3%
Driver and safety	21%	24%	21%	19%	18%	24%	19%	17%	21%	23%	22%	20%	17%	19%	18%	23%	26%	19%	24%	24%	20%
Vehicles real-time tracking and monitoring	17%	21%	17%	16%	14%	22%	14%	13%	18%	19%	19%	18%	13%	15%	16%	19%	21%	15%	18%	21%	16%
Driver management and safety standards implementation	3%	4%	3%	3%	3%	2%	4%	2%	2%	2%	3%	2%	3%	2%	1%	3%	3%	2%	3%	2%	4%
Fleet security and protection systems	2%	2%	3%	1%	2%	1%	4%	2%	1%	4%	0%	1%	2%	3%	2%	4%	3%	3%	4%	2%	2%
Administrative & Compliance	9%	8%	10%	13%	12%	5%	8%	14%	7%	10%	6%	7%	14%	8%	9%	9%	6%	10%	5%	7%	12%
Centralizing and digitizing fleet documentation	7%	6%	7%	11%	9%	4%	6%	8%	5%	8%	5%	5%	12%	6%	6%	7%	5%	8%	4%	6%	10%
Proactive compliance deadline management	2%	2%	2%	3%	3%	1%	2%	6%	3%	3%	1%	2%	3%	2%	3%	1%	1%	2%	1%	2%	2%
Environment & Sustainability	5%	6%	5%	5%	7%	6%	3%	6%	8%	5%	5%	6%	7%	4%	2%	5%	3%	6%	6%	5%	5%
Support for the adoption and management of electric vehicles	2%	2%	1%	2%	4%	3%	1%	4%	3%	2%	2%	3%	2%	3%	1%	3%	1%	2%	2%	1%	2%
Tools and practices for a sustainable fleet management	2%	2%	3%	2%	2%	2%	1%	1%	3%	2%	2%	3%	4%	0%	1%	2%	1%	3%	2%	2%	2%
Vehicle emissions monitoring	2%	2%	1%	2%	1%	2%	2%	1%	3%	1%	1%	2%	3%	1%	0%	1%	1%	3%	3%	2%	2%
Others	22%	24%	20%	22%	20%	22%	24%	27%	19%	23%	25%	21%	25%	23%	29%	23%	20%	23%	22%	22%	19%
Other	20%	22%	20%	21%	19%	20%	23%	26%	18%	20%	24%	20%	23%	21%	27%	22%	17%	21%	20%	20%	18%
Enhanced refrigerated vehicles	2%	2%	0%	1%	0%	2%	2%	1%	1%	2%	1%	1%	1%	2%	2%	2%	2%	2%	3%	2%	1%

A13. From your personal perspective, what would help you with your daily tasks as a fleet manager and enable you to manage your fleet more effectively?

Basis: companies with corporate vehicles = 100%



OPEN-ENDED QUESTION: WHAT WOULD HELP FLEET MANAGERS?

HOW TO READ THE RESULTS ?

In Romania in 2026, 21% of the respondents declare that Automated vehicle performance monitoring and predictive maintenance would help them as a fleet manager.

New question

IN %



	W	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ	IN	ID	TH
Fleet performance management	44%	39%	45%	46%	45%	47%	45%	49%	47%	47%	47%	43%	51%	45%
Automated vehicle performance monitoring and predictive maintenance	18%	17%	21%	19%	18%	14%	20%	26%	19%	21%	19%	17%	27%	22%
Fuel consumption monitoring and optimization	13%	11%	12%	14%	14%	18%	11%	15%	12%	12%	17%	12%	15%	12%
Cost control and financial oversight of fleet operations	11%	6%	12%	12%	15%	14%	10%	10%	12%	13%	11%	11%	9%	8%
An all-in-one fleet management software / platform	14%	13%	13%	13%	12%	15%	16%	13%	16%	15%	15%	16%	15%	15%
Logistics and fleet operations management	27%	24%	24%	27%	29%	33%	30%	26%	32%	28%	34%	32%	24%	31%
Route and delivery optimization	15%	15%	13%	16%	14%	21%	17%	15%	21%	13%	15%	20%	12%	19%
Fleet allocation, operations coordination and optimization	14%	9%	13%	14%	15%	16%	13%	11%	19%	16%	20%	14%	11%	17%
Intelligent cargo and load optimization	2%	2%	1%	0%	3%	3%	3%	1%	1%	2%	3%	2%	1%	2%
Driver and safety	21%	19%	19%	17%	21%	17%	30%	17%	22%	18%	19%	27%	25%	25%
Vehicles real-time tracking and monitoring	17%	15%	15%	13%	18%	13%	25%	14%	18%	14%	15%	21%	21%	20%
Driver management and safety standards implementation	3%	2%	3%	2%	2%	3%	3%	3%	4%	3%	3%	4%	5%	5%
Fleet security and protection systems	2%	4%	3%	3%	3%	4%	2%	1%	1%	1%	2%	4%	0%	2%
Administrative & Compliance	9%	9%	7%	11%	11%	11%	8%	11%	11%	11%	7%	12%	9%	7%
Centralizing and digitizing fleet documentation	7%	8%	6%	9%	10%	7%	6%	9%	9%	9%	6%	9%	8%	4%
Proactive compliance deadline management	2%	2%	1%	3%	2%	3%	2%	2%	3%	2%	1%	3%	1%	3%
Environment & Sustainability	5%	5%	7%	8%	4%	4%	5%	7%	5%	5%	8%	5%	7%	3%
Support for the adoption and management of electric vehicles	2%	3%	3%	3%	2%	2%	3%	3%	2%	2%	3%	1%	2%	1%
Tools and practices for a sustainable fleet management	2%	1%	4%	3%	2%	2%	2%	3%	2%	2%	3%	2%	4%	1%
Vehicle emissions monitoring	2%	1%	2%	3%	1%	2%	0%	3%	2%	2%	3%	2%	2%	1%
Others	22%	25%	25%	21%	21%	19%	17%	21%	17%	21%	16%	16%	18%	22%
Other	20%	24%	21%	21%	19%	16%	14%	19%	16%	20%	15%	14%	16%	21%
Enhanced refrigerated vehicles	2%	2%	4%	0%	2%	3%	2%	1%	2%	1%	1%	3%	3%	1%

A13. From your personal perspective, what would help you with your daily tasks as a fleet manager and enable you to manage your fleet more effectively?

Basis: companies with corporate vehicles = 100%

APPENDIX



Vehicles in fleets

- **PC:** Passenger Cars
- **LCVs:** Light Commercial Vehicles
- **Second-hand vehicles:** Vehicles that were not new when acquired. "Not new" means already used by others outside the company. It does not consider 0 km pre-registered cars from dealers/OEMs.

Financing methods

- **Operational Leasing / Full Service Leasing with residual value risk for the lessor:** a service which, in exchange for a monthly rental, enables the customer to have a vehicle for a defined amount of time and mileage with associated optional services. The customer chooses the vehicle along with the associated optional services such as maintenance, insurance, fuel management, breakdown and replacement vehicle, tyre replacement...
- **Financial leasing with residual value risk for the lessee:** can be defined as renting a vehicle with the possibility to buy it at the end of the contract, for a price agreed at the beginning of the contract
- **Outright purchase / Direct purchase:** Using customer's own funds (cash or bank loan)

Electrified vehicles technologies

- **BEV (Battery Electric Vehicle):** Powered only by electricity using energy stored in rechargeable batteries
- **PHEV (Plug-in Hybrid):** Combines a petrol or diesel engine with an electric motor and a battery that can be recharged by plugging into an electrical outlet
- **HEV (Hybrid):** Combines a petrol or diesel engine with an electric motor and small battery, with no possibility to recharge by plugging into an electrical outlet
- **Hydrogen Fuel cell:** Uses hydrogen fuel for motive power (not related to pilot test of a vehicle)
- **FlexFuel:** Can be powered on different fuels or blends (e.g. ethanol, LPG)

Telematics

- **Telematics** enables transmission of data to the fleet manager to monitor fuel consumption, driver behaviour, vehicle location, driver's impact on environment... from vehicles on the move. Data is transmitted by means of a car manufacturer box or by an after sales box installed in the vehicle. Telematics do not include data transmission by the means of the users' smartphones.

Mobility policies

- **Public transport expense reimbursement** (partial or total)
- **Personal vehicle expense reimbursement** (partial or total)
- **Mobility Budget**: predefined budget granted by the employer allowing employees to choose their mode of transport
- **Private lease or salary sacrifice**: private lease where an employee leases a car on his own behalf / salary sacrifice where an employee leases a car via their employer
- **A short or mid-term rental vehicle** to provide mobility for an employee
- **Car or cash allowance**

Mobility solutions

- **Car sharing or pooled/unassigned vehicles**: a pool of cars put at your disposal by your company that can be booked and used for professional or personal use.
- **Ride sharing**: arranging for travel between several parties in a private vehicle driven by its owner, free or for a fee, by means of a website or app provided by your company
- **Car pooling**: meaning in exchange for a payment
- **Bike Leasing**: solution provided by the company
- **Bike Sharing**: solution provided by the company
- **Scooter and moto leasing**: solution provided by the company
- **An app** provided by the company to book multiple mobility solutions
- **A card** provided by the company to pay multiple mobility solution

Charging policies

- **Partial financing:** A shared-cost model where the employer covers a portion (e.g. 50%) of the purchase/installation costs of charging solutions at employee's homes
- **Lump-sums:** A fixed allowance paid by the employer for purchase/installation of charging solutions at employee's homes
- **Smart Cable:** Charging cable with technologies and features beyond traditional cable, such as adjustable charging speed or charging cost / reimbursement data management
- **Reinforced sockets for charging:** Upgraded version of a regular socket, with a bigger maximum output. It's usually made for indoor and outdoor installation and comes with a locking mechanism

Future challenges

- **Car-selling models:** Contractual models that define who signs the leasing contract and who carries the financial responsibility. Three models:
 - B2B (company signs; company is fully responsible),
 - B2B2E (employee signs under employer facilitated scheme; employee is financially responsible),
 - B2C/Retail (private individual signs and bears all responsibilities).

COMPANY SIZE SEGMENT DEFINITION



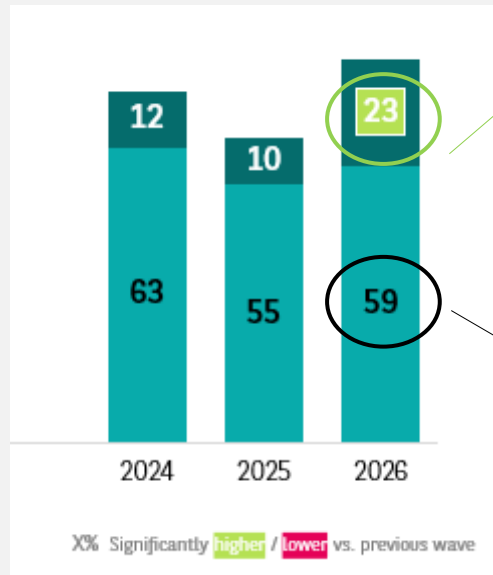
	AT	CH	DE	ES	FR	GR	IT	PT	UK	BE	LU	NL	CZ	PL	SK	RO	DK	FI	NO	SE	MA	TR	BR	CL	PE	US	CA	MX	AU	NZ	IN	ID	TH			
Less than 99 empl.	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●	●		
100 - 249 empl.	●					●					●				●		●	●	●	●	●	●		●	●			●	●	●	●	●	●	●		
100 - 499 empl.		●		●				●		●		●	●	●		●							●					●								
100 - 999 empl.			●		●		●		●																	●										
250 empl. or more	●					●					●				●		●	●	●	●	●	●	●		●	●			●	●	●	●	●	●		
500 empl. or more		●		●				●		●		●	●	●		●							●					●								
1000 empl. or more			●		●		●		●																	●										

STATISTICAL FOCUS: SIGNIFICANT EVOLUTIONS

WHAT IS IT?

This barometer monitors changes between waves.

We use **significance tests** to determine whether an observed increase or decrease is likely to be a market reality or a random variation. These tests are statistical methods that determine whether the results of a survey are likely to be true or occurred by chance.



The gap between 10% and 23% is large enough
→ the increase is significant

The gap between 55% and 59% is too small
→ there is no increase

HOW DOES IT WORK?

The significance of the test depends on the **sample size**: significant evolutions appear with larger samples, whereas smaller samples require larger evolutions to be considered significant.

Also, for statistical reasons, the required evolution depends on the result of the KPI being tested.

⇒ According to the sample size and the KPI result, the required evolution to make the increase/decrease significant is :

	KPI = 5%	KPI = 50%
Sample = 300 interviews (1 country)	At least 2.5 points	At least 5.7 points
Sample = 6,000 interviews (Europe)	At least 0.6 point	At least 1.3 point
Sample = 10,000 interviews (Global)	At least 0.4 point	At least 1 point

Warning: if the KPI is a filtered question (i.e. not asked of all respondents), the sample size is smaller, and the required evolution is larger.

THANK YOU