

2025

# UNLOCKING THE FUTURE OF CORPORATE MOBILITY:

STRATEGIES FOR A CONNECTED, SUSTAINABLE AND EMPLOYEE-CENTRED APPROACH



# EXECUTIVE SUMMARY

Employee mobility is undergoing a shift. For the scope of this whitepaper, employee mobility is defined as daily and short-distance travel of employees for commuting and business purposes.

Whereas mobility policies used to focus on fleet management and the reimbursement of expenses, a new opportunity is emerging. Forward-thinking companies are using mobility as a strategic lever to meet key business goals, such as saving costs, meeting sustainability targets, and talent management.

New habits, technologies, and developing regulations change the way we look at employee mobility for companies of all sizes. Hybrid work models and more sustainable travel options may be more popular with employees than traditional company car benefits. The expansion of electric vehicle (EV) charging networks makes it more viable to offer EVs in company fleets. The inclusion of employee commuting emissions in mandatory reporting of direct and indirect GHG emissions (eg: Corporate Sustainability Reporting Directive) puts mobility to the front of ESG compliance. And, for many employees, ESG commitment is no longer optional; instead, they expect to see genuine action from their employers to sustainability and social responsibility.

Now is the time to reshape corporate mobility policies to address the many emerging pressures and lead effectively.

As companies are driven to focus more on environmental impact, employee well-being and cost control, mobility policies are becoming a powerful and often overlooked, way to deliver on these goals. Acting early and managing change strategically is critical to staying ahead.

This whitepaper presents a structured path to shaping the future of mobility policies in clear, simple steps. Whether your company is just beginning to review its mobility policies or is refining its approach, HR leaders, Corporate and Social Responsibility (CSR) managers, and Fleet and Mobility teams, will find actionable insights to turn them into strategic advantage.

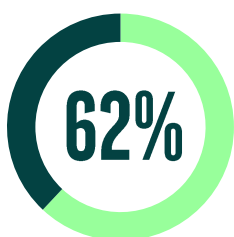
# TABLE OF CONTENTS

<b>1/ SHAPING THE FUTURE OF CORPORATE MOBILITY: THE OPPORTUNITY .....</b>	<b>P.04</b>
<b>2/ WHY YOU NEED TO RETHINK YOUR CORPORATE MOBILITY STRATEGY NOW .....</b>	<b>P.06</b>
<b>3/ THE ROLE OF CROSS-FUNCTIONAL LEADERSHIP IN MOBILITY TRANSFORMATION .....</b>	<b>P.08</b>
<b>4/ HOW TO RESHAPE YOUR CORPORATE EMPLOYEE MOBILITY STRATEGY .....</b>	<b>P.09</b>
<b>5/ GET READY FOR THE FUTURE OF MOBILITY POLICIES: EARLY ACTION MATTERS .....</b>	<b>P.13</b>
<b>6/ UNLOCKING THE POTENTIAL OF CORPORATE MOBILITY NOW .....</b>	<b>P.17</b>



# UNLOCKING THE FUTURE OF CORPORATE MOBILITY:

## STRATEGIES FOR A CONNECTED, SUSTAINABLE AND EMPLOYEE-centred APPROACH.



Part of employees considering mobility offerings important in choosing an employer



Sustainability goals

Digital integration

Employee experience

## 01/ SHAPING THE FUTURE OF CORPORATE MOBILITY: THE OPPORTUNITY

Mobility is becoming an important factor in employee satisfaction, environmental responsibility and operational efficiency. Unlike traditional fleet policies, which focus on managing vehicles for a limited group of eligible employees, modern mobility policies take a broader approach, including all employees and all means of transport.

The focus is shifting to policies that are inclusive, flexible, and low-carbon – designed to meet the changing needs of modern employees and growing environmental expectations from both governments and individuals.

Employee demand is a key driver of change. According to the Arval Employee Mobility Survey 2024, **62% of employees** considered mobility offerings important when choosing a company to work for, and only 50% of employees surveyed were satisfied with their company's current mobility offers. Additionally, 55% of employees anticipate that companies will enhance their mobility offers within the next five years.

The message is clear – companies need to invest in mobility solutions that help them attract top talents and nurture a satisfied workforce.

Employees are looking for flexibility, balance and purpose, and providing them with diverse, accessible, and low-carbon commuting options is now more of a responsibility than a benefit. At the same time, corporate budgets are under pressure and mobility strategies that rely only on private cars are becoming unsustainable from a cost and environmental perspective.

And, as a younger generation of employees enter the workplace, changing demands mean that policies tolerated by previous generations may no longer be sufficient. According to the 2024 Arval Employee Mobility Survey, 68% of employees under 35 said they would choose an employer that offers sustainable commuting options over one that doesn't.

Mobility policy transformation is an opportunity to drive change and innovation by aligning employee expectations, environmental targets, and cost-efficiency. By embracing digitalization, simplification, and greater flexibility, companies can shift towards more sustainable, employee-centred mobility options. The more you understand what factors are shaping mobility at a local, regional, and global level, the better you can tailor your strategies to meet changing demands.

“

Our employees often asked us for new solutions for their mobility, especially in connection with changes in the way they work (such as remote work) and having access to more flexible offers. The main advantage of the sustainable mobility pass [that we introduced at Nickel France] is that it can combine reimbursement, transport and the use of sustainable mobility solutions.

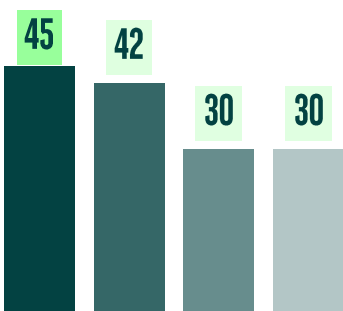
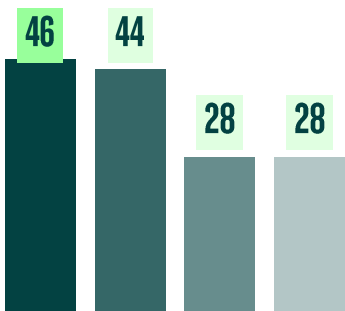
Julien Foucher,  
HR Manager at Nickel France.

”

TOP 4 REASONS

FOR IMPLEMENTING MOBILITY POLICIES

FOR IMPLEMENTING MOBILITY SOLUTIONS



- In %  
For Global + Regional bench in 2025
- Because of HR related needs like talent recruitment
  - For reasons related to CSR policies
  - To anticipate upcoming regulations
  - Because of tax benefits

How to read the results?

46%

of the companies, overall in 2025, declare that the main reason for **introducing mobility policies** is: **Because of HR related needs like talent recruitment.**

Employee mobility key insights. Source: [Arval Fleet and Mobility Barometer 2025](#)

Smarter mobility policies offer cost control through shared transport, multiple offerings, and better demand planning.

This is a key moment for cross-functional leadership. HR leaders can integrate mobility into the employee experience, CSR managers can use this shift to advance Environmental, Social and Governance (ESG) goals, and fleet and mobility teams can transition from being asset administrators to strategic enablers of change.

Companies operating with outdated or fragmented approaches to mobility that focus on car benefits or mileage policies will miss the bigger opportunity: to align mobility with corporate values, carbon targets, and workforce expectations.

## 02/ WHY YOU NEED TO RETHINK YOUR CORPORATE MOBILITY STRATEGY NOW

In their report [The future of mobility in 2035](#), McKinsey & Company identified a profound transformation in mobility that is expected to happen by 2035, due to shifts in technology, regulations, and society, driving change at pace.

Looking ahead to the corporate mobility strategy of the future, it will need to cater to a new reality. Many city centres may be zero-emission zones in the future, while employees will have likely forsaken designated company cars for a personalised mobility budget that they can spend for example on trains, car-sharing, or e-bikes. Beyond regulations, another key catalyst for change is the progressive improvement of city mobility infrastructures, such as bike lanes, bike sharing, public transport, and more. Hybrid working schemes are expected to be the norm, and CO<sub>2</sub> emissions to be disclosed on ESG reports. In parallel, governments will likely offer tax incentives to companies that promote decarbonized transport modes.

### Amsterdam's push for zero-emission mobility



Amsterdam is phasing out polluting vehicles and promoting cleaner transport options. New transport policies prioritise public transport, car-sharing, cycling, and walking to create a healthier, more sustainable urban environment.

A 'Clean Air Plan' was introduced in 2019, coordinated with the National Government, businesses, and industries, with a gradual and detailed well-communicated plan on how to transition from low-emission zones to zero-emission urban transport.

(Source: [Setting the trend for emission-free mobility](#), February 2023)

### In some places, this is already happening:

- In France, the [Forfait Mobilités Durables](#) (FMD) encourages employers to subsidize more sustainable commuting.
- Belgium's [federal mobility budget](#) allows employees to swap a company car for a budget they can use on public transport, cycling or other sustainable options.
- The [EU's Corporate Sustainability Reporting Directive](#) makes it compulsory to include disclosures about corporate transport in ESG reporting.

# 2035

Profound transformation  
in mobility

Zero-emission zones



Electrification, shared and multi-modal transport, data-driven planning and employee empowerment are already transforming mobility policies as we know them. Companies that aren't ready now will be caught off-guard, operationally and legally.

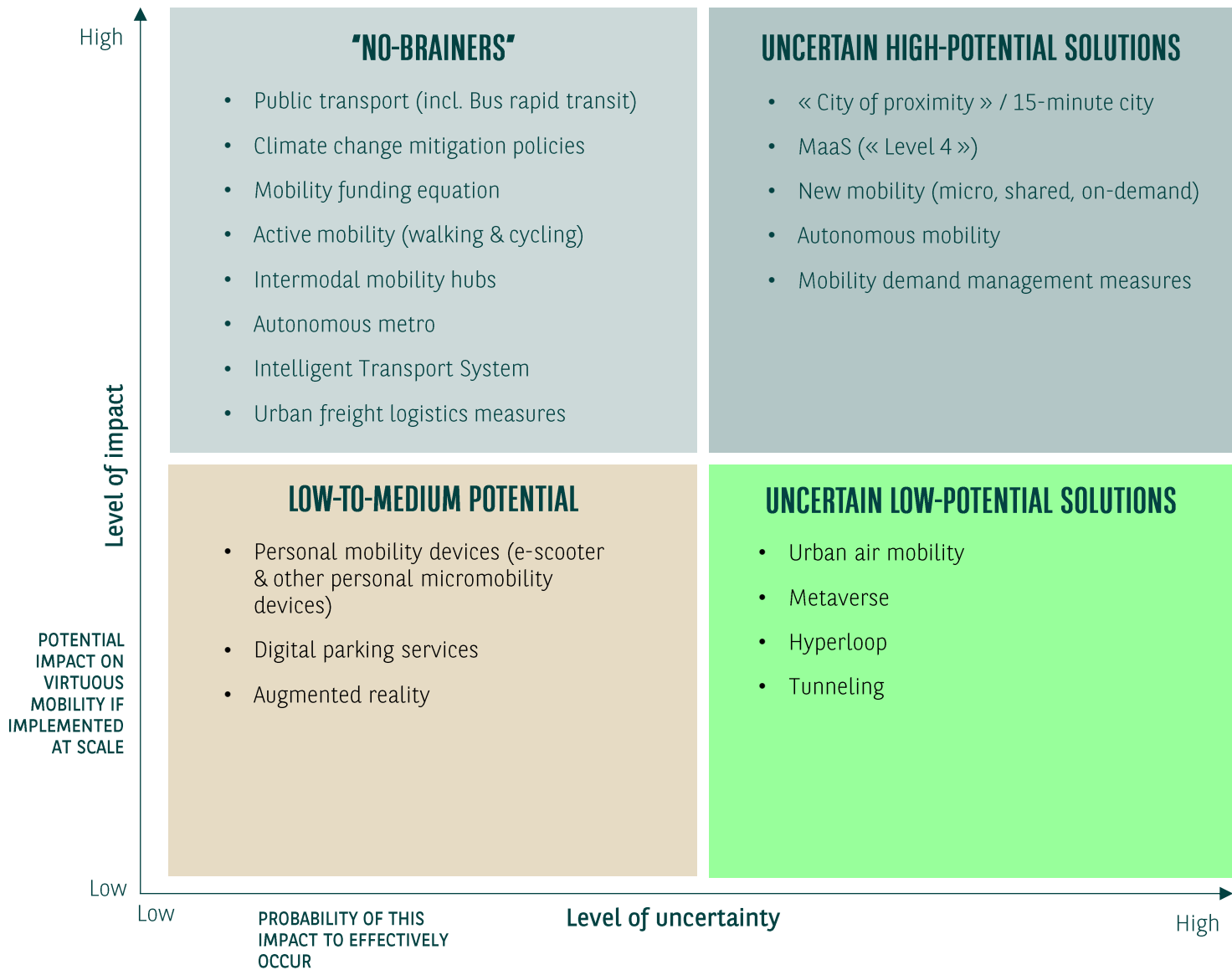
The way most of us work has changed radically over the past few years. When given the choice, employees split their time between home, co-working spaces and company offices. And this makes one-size-fits-all mobility benefits, such as a company car or train season pass, obsolete.

Mobility policies now need to cater for inconsistent commuting requirements, employees living further from offices, and evolving employee expectations. Policies need to be flexible and inclusive to meet these changing needs.

This diagram below illustrates the potential scope of transformation and the impact these changes will have on employee mobility, with a number of solutions, from the immediately applicable to those possible in a more distant future.

## MOBILITY SOLUTIONS

(CONCEPTS, POLICIES, AND SERVICES) AND LIKELY IMPACT ON MODAL SHIFT



Mobility concepts, policies and services that are most likely to drive change. Source: *The future of mobility 5.0* | Arthur D. Little

Furthermore, where previously HR might have overseen benefits while fleet teams managed vehicles and CSR staff reported on emissions, the inter-connected nature of changing needs will, going forward, require a connected, cross-functional team that can build a holistic approach to employee mobility.

### 03/ THE ROLE OF CROSS-FUNCTIONAL LEADERSHIP IN MOBILITY TRANSFORMATION

The future of mobility requires cross-functional collaboration. While fleet and operational teams have long played a key role—contributing to cost control, emissions reduction, and HR strategies—mobility now intersects with other strategic areas across the business such as emissions reduction and HR strategies. A joined-up approach will help unlock its full potential.

How employees get to work, and whether they have real choice in the matter, directly impacts inclusion and equality strategies. It also affects employee satisfaction, talent retention and company attractiveness. Limited commuting options can disadvantage lower-income or remote workers, while flexible and sustainable alternatives can boost engagement and help with talent retention.

**Germany: company bike leasing for employees as a perk**



In Germany, company bikes can be used for work and personal purposes, with monthly payments taken from gross income, thus reducing employees’ taxable income. Some companies also have policies that recognise commuting time as work time.

When asked about their preferred work benefits, respondents to a Future of Mobility Lab research project ranked availability of e-bikes second only to additional paid vacation days.

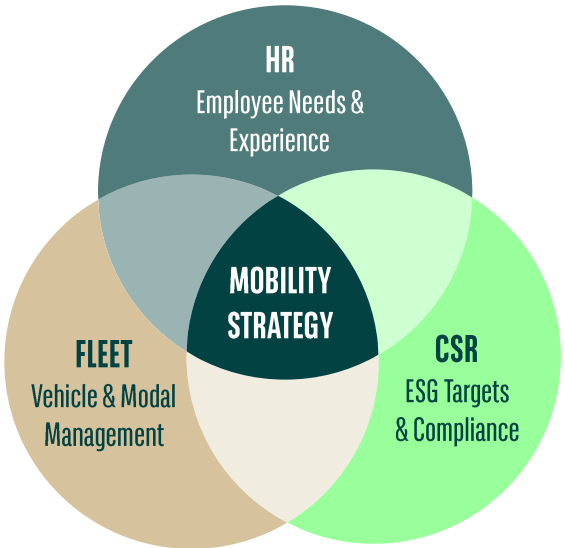
*(Source: The Future Mobility Lab of the Institute for Mobility at the University of St. Gallen, October 2024)*

Employee travel is a source of corporate emissions and can be a critical lever in achieving net zero goals and demonstrating climate leadership. According to FutureTracker, [transport accounts for around 17% of all global greenhouse gas emissions](#). Commuting to work can be an important contributor in this, depending on the industry of a company.

As regulations and legislation become stricter, with directives on air quality and reporting of direct and indirect GHG emissions, companies need mobility strategies that not only meet legal requirements but also keep them competitive while answering their employees’ demands for flexibility.

#### HOW MOBILITY STRATEGY COMES FROM CROSS-FUNCTIONAL COOPERATION

How cross-functional sharing of responsibilities leads to a solid mobility strategy.



Collaboration across functions is critical to success, as mobility policies touch so many diverse areas of a business. Companies need to break down silos and build cross-functional mobility teams.

These teams will need to take into account the perspectives and priorities of HR, CSR, Fleet Management, and Finance, with shared and measurable KPIs aligned to common business goals. Only by working together can companies design future-ready mobility policies that are inclusive and scalable – and that can transform mobility from a hidden cost to a strategic asset.



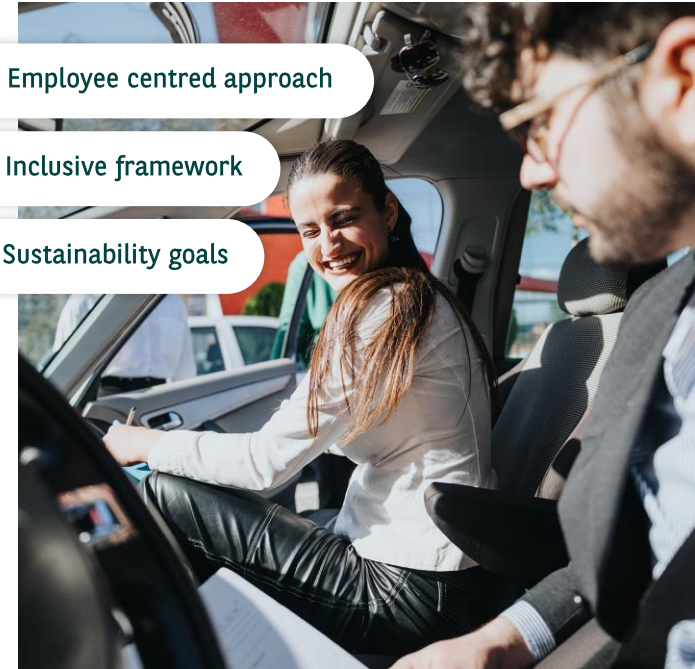
# 04/ HOW TO RESHAPE YOUR CORPORATE EMPLOYEE MOBILITY STRATEGY

## Understanding the shift

Most companies already have a car policy that details the eligibility for company cars, types of available vehicles, fuel reimbursement, and usage rules. But this type of policy typically only covers a selected number of employees, such as the sales team and management / executive teams.

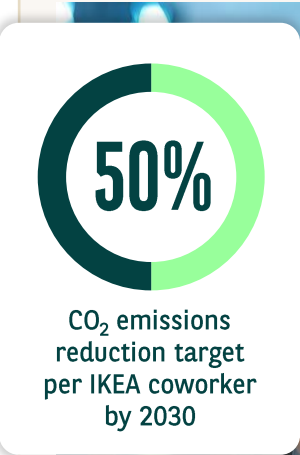
A comprehensive mobility policy needs to be much bigger than this, essentially being a holistic and inclusive framework that addresses how all employees travel for work, from commuting to business travel to inter-office meetings – aligning all those elements with company values, budgets, and policies fighting against climate change.

Mobility policies need to be employee-centred and designed to be flexible and future-ready, while meeting environmental targets through the effective use of technology.



### IKEA includes co-worker commuting and business travel in its climate footprint

💡 IKEA's key performance indicator (KPI) for co-worker commuting and business travel is to reduce greenhouse gas (GHG) emissions from employee travel by 50% per co-worker (i.e., in relative terms) by FY2030, compared to the baseline year FY2016. This target was established as part of IKEA's broader climate strategy, which uses FY2016 as the baseline year for all major emissions reduction goals.



As of FY2024, this specific KPI shows a steady reduction, but the pace will need accelerate to meet the 50% per co-worker reduction target by FY2030. The emissions from co-worker commuting and business travel were 0.5 million tons of CO<sub>2</sub> equivalent in FY2016, down to 0.44 million tons in FY2024

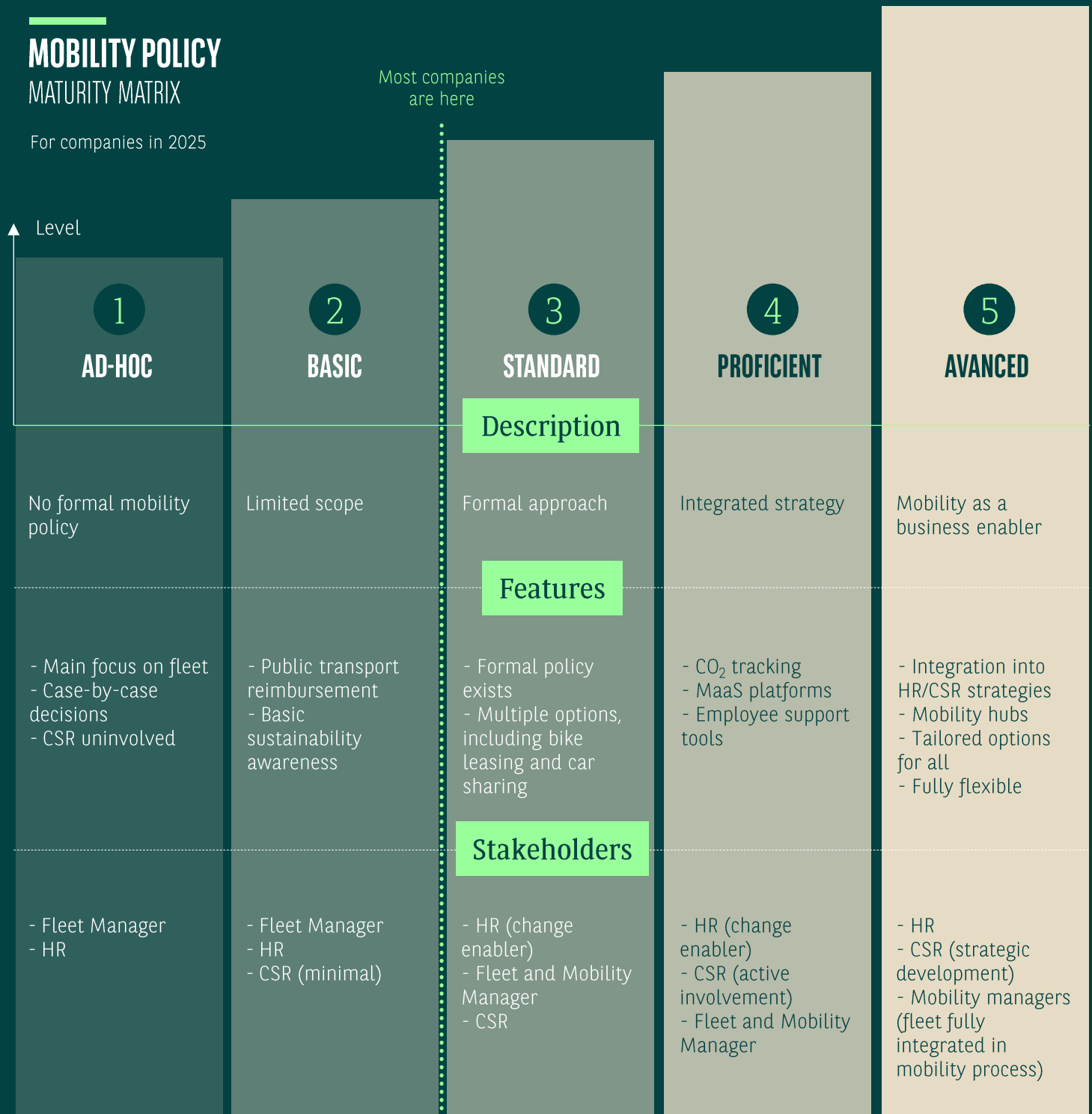
In Fiscal Year 2024 (FY24), 95% of IKEA's employee business travel in Sweden was undertaken sustainably. The total climate footprint of IKEA decreased by 1.1 million tonnes of CO<sub>2</sub> equivalent in absolute terms compared to FY23 which was a reduction of 5%.

*(Source: [IKEA Sustainability Report 2024](#), p.13, [The climate footprint across the IKEA value chain](#))*

## Identifying your starting point: the mobility policy maturity matrix

The simple framework outlined here aims to capture progress, help you assess your current position, and enable you to plan how to develop your policy in the future.

You can use the matrix as a diagnostic tool and a roadmap. Most companies currently sit between levels 2 and 3. The goal is to move towards levels 4 and 5, where mobility becomes a real differentiator.



## Building a future-ready mobility policy

Once you've assessed where you sit on the matrix and where you want to be, you'll need to consider what a modern mobility policy needs to include. As a minimum, it should cover the following:

1. **Policy scope and eligibility:** Clear definition of business vs personal mobility to cover all employees.
2. **Eligible transportation modes:** Walking, cycling (leasing, bonuses, mileage reimbursement), public transport (fully or partially reimbursed), cars (car-leasing, carpooling/car-sharing, ride-hailing or taxi usage), electric vehicles (battery electric vehicles and plug-in hybrid), and more.
3. **Tools and platforms:** Mobility budget management systems (e.g. fixed monthly allowance), Mobility-as-a-Service apps, CO<sub>2</sub> dashboards, or e-wallets for commuting.
4. **Safety and compliance:** Legal conformity to national mobility laws, driver safety policies, insurance coverage, helmet mandates for bikes, GDPR and data compliance for tracking tools, etc.
5. **Communication and support:** Employee onboarding, FAQs, self-service portals, help desks.

Modular policies will help employees tailor their needs to their location, life stage and company role, while still adhering to company policies and helping drive strategic changes.

### CHECKLIST:

#### WHAT TO INCLUDE IN YOUR POLICY

- ✓ Types of transport covered
- ✓ Reimbursement models
- ✓ Eligibility
- ✓ Incentives
- ✓ Booking and tracking tools
- ✓ ESG alignment
- ✓ Safety and compliance

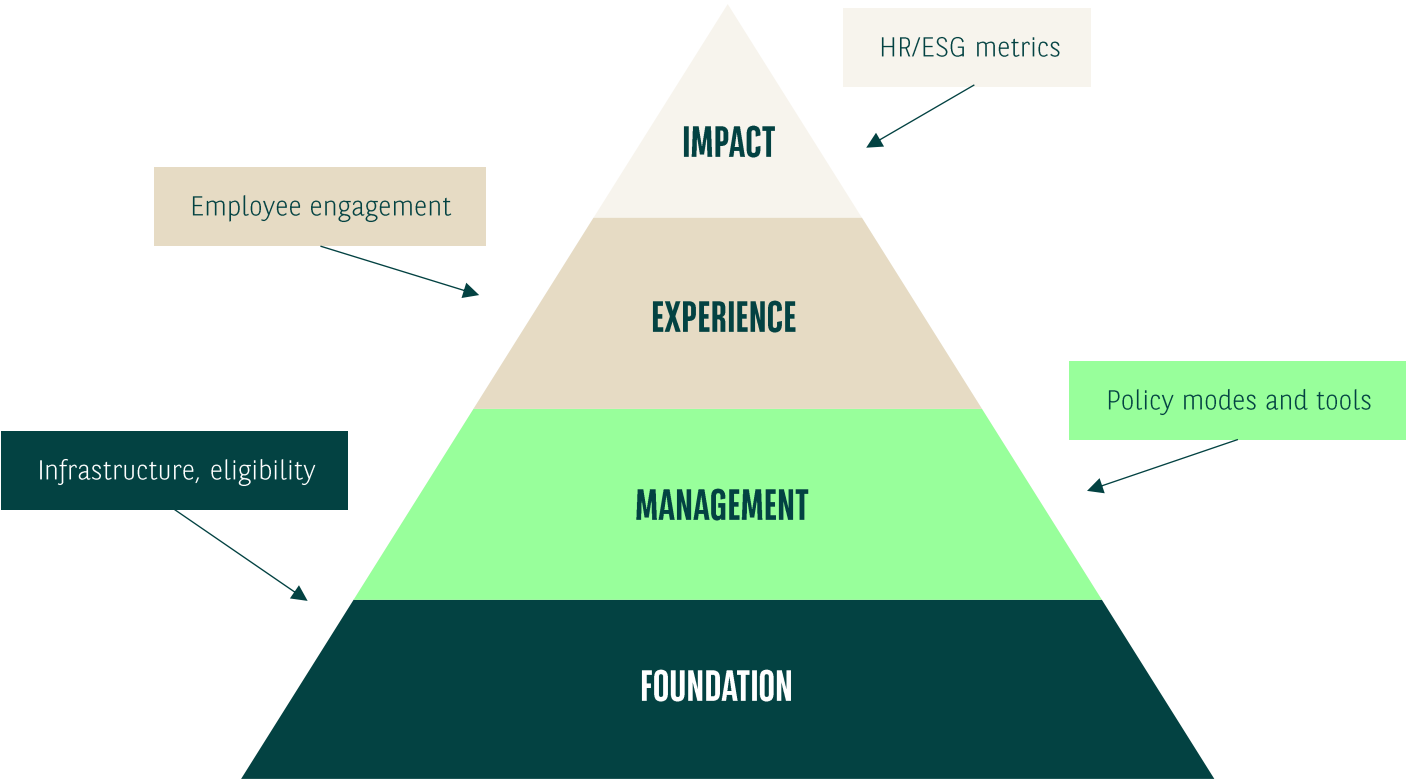


Future-ready mobility policy

Drive strategic change

Tailored needs

# THE BUILDING BLOCKS OF INTEGRATED MOBILITY POLICIES



- Integrated mobility policies
- Employee experience
- Management tools



## 05/ GET READY FOR THE FUTURE OF MOBILITY POLICIES: EARLY ACTION MATTERS



The shift from traditional fleet-based frameworks to a future-proof and flexible mobility policy isn't an easy fix. It needs a phased approach, buy-in from different business units, and a disruptive approach to existing ways of working that may have become ingrained over time.

Change management is critical. Waiting until new legislation forces you to change, or until competitors move first, means playing catch up. It's better to start now and design policies that evolve alongside your workforce and ahead of legislation or policies fighting against climate change demands.

To help you establish a roadmap that will take you in the right direction, you can use a 5-step approach, as below:

## 1/ AMBITION

### Define ambitions

Decide what you want to achieve as an organisation and your overall strategy.

## 2/ EXPLORE

### Explore and align

Use the mobility matrix to assess where you are, how far you have to go, and discover opportunities:

- Start with an audit of current practice
- Map out mobility related costs, CO<sub>2</sub> impact and employee satisfaction
- Align key departments (HR, CSR, Fleet, Finance) on shared objectives

## 3/ DESIGN

### Design and test

Take a soft approach to roll out so that you can learn as you go and discover the optimal path:

- Draft a pilot policy including diverse commuting options
- Start with adoption of simple and popular aspects of the policy (volunteers or designated employees)
- Test new digital tools

## 4/ DEPLOY

### Deploy and support

Roll out the policy, leading with promotion and education:

- Launch the policy company-wide
- Train HR teams and line managers
- Establish employee support and helplines including FAQ, internal webinars, newsletters...

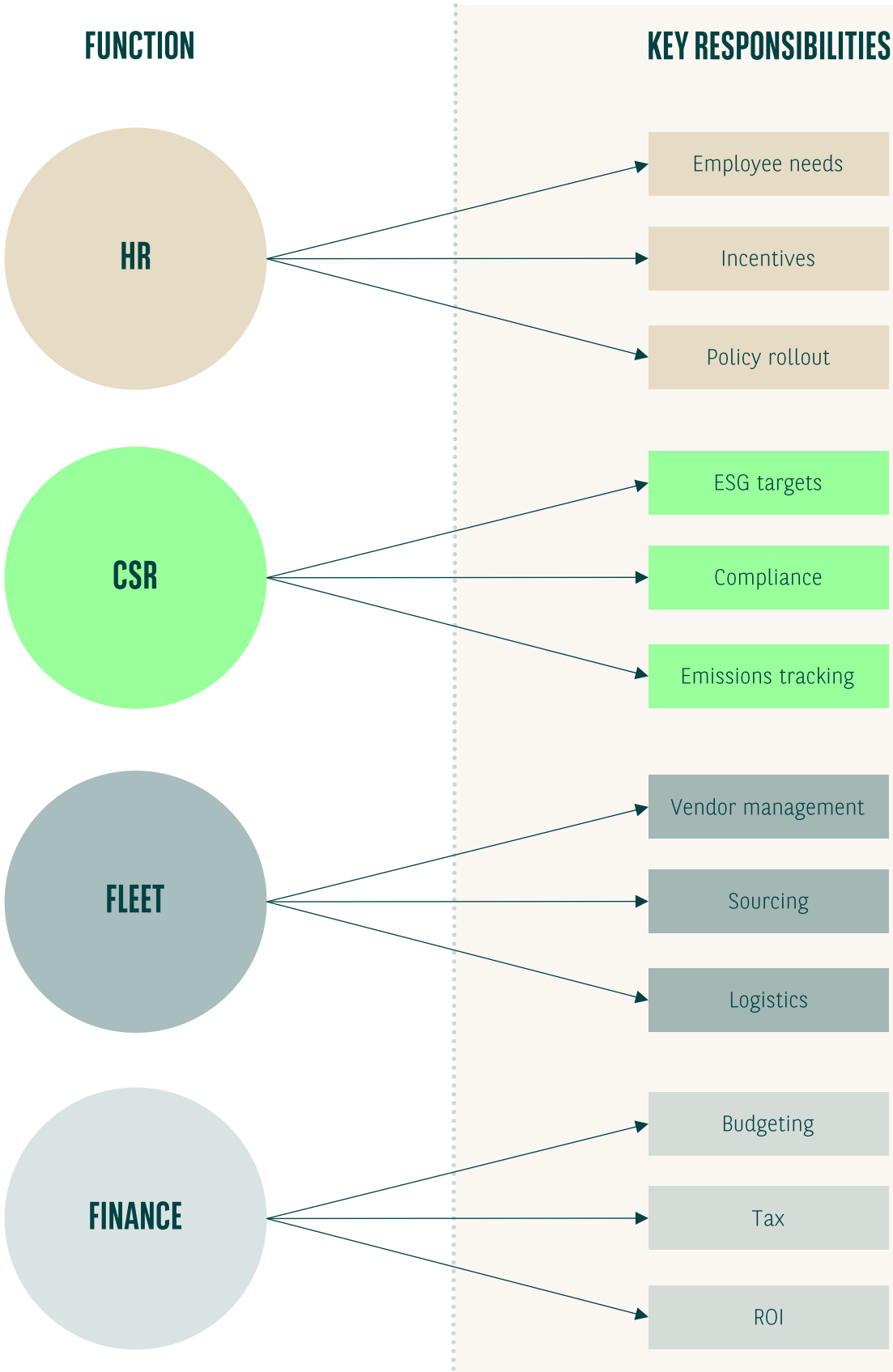
## 5/ MONITOR

### Monitor and evolve

Create momentum for continuous improvement:

- Measure adoption, user feedback, and effect on emissions
- Adjust policies based on feedback and changing legislation
- Share successes across company to encourage further adoption

A successful transformation isn't driven by a single department, so it's important to establish ownership and accountability as you start the process in your company. Setting up a cross-functional steering team with clear ownership and accountability early in the process will help you move faster from the start.



## What tomorrow could look like

Every organisation will have its own particular needs and requirements, but here we highlight three different use cases of how you might approach your strategy.

COMPANY A	Young urban workforce	
Strategy	Options	Results
Phased removal of parking spaces, all-staff mobility budget, MaaS platform	Public transport, e-scooters, shared e-cars, bike leasing, monthly bike passes	Significant drop in solo car use, improved employee engagement
COMPANY B	Distributed office, hybrid work	
Strategy	Options	Results
Policy built around flexibility and fairness with tiered mobility benefits by region	Train and carpool for suburban offices, e-bike leasing for HQ, car sharing	Lower travel expense claims, increased satisfaction across all regions
COMPANY C	ESG-focused enterprise	
Strategy	Options	Results
Employee mobility that’s fully integrated into carbon footprint strategy	BEVs for essential fleet roles, walking/cycling incentives, tracked emissions per employee	Featured in CSR reporting, cut in Scope 3 commuting emissions



## QUICK WINS

### TO GET STARTED

- ✓ **Create a baseline report** on how current employees commute
- ✓ **Identify** one or two regions or teams for a **pilot**
- ✓ Introduce **internal champions** or set up a **task force**
- ✓ **Offer reimbursement** for **cycling** or using a **bike leasing** program
- ✓ **Communicate widely** within the organisation by positioning champions as **role models**
- ✓ Engage with payroll and legal to **ensure mobility budgets can be processed**, once management decides to implement them

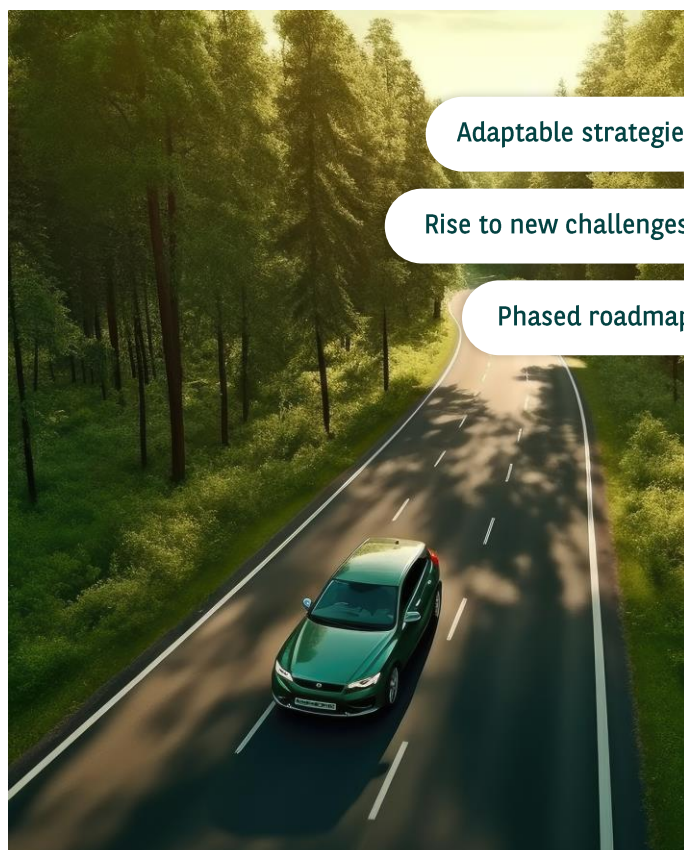
## 06/ UNLOCKING THE POTENTIAL OF CORPORATE MOBILITY NOW

Corporate mobility is no longer a back-office concern. Instead, it now has the potential to be a key differentiator for your business. With constant change on the horizon, as cities evolve and employee needs shift, corporate mobility needs to rise to new challenges.

We've explored why mobility matters in its position at the intersection of environmental responsibility, employee experience, cost efficiency and digitalization. Mobility is evolving, driven by regulatory changes, new ways of working, and changing employee priorities.

We've looked at tools and frameworks you can start to use now to help you create future-ready mobility policies that align people, purpose, and performance.

And, by showing how you can take action through a phased roadmap and adaptable strategies, we have mapped the way for you to future-proof your own approach and turn mobility policies into a true strategic asset.



## START HERE

TAKE YOUR FIRST 3 STEPS TO FUTURE-PROOF YOUR EMPLOYEE MOBILITY

### 1/ DO A MOBILITY AUDIT

- ✓ How do employees travel now?
- ✓ What are the quick wins and biggest issues?
- ✓ Map out current costs, benefits, and gaps



### 2/ BUILD A CROSS-FUNCTIONAL TASKFORCE

- ✓ Bring together HR, CSR, Fleet, and Finance
- ✓ Agree on a shared vision and key outcomes
- ✓ Nominate a senior sponsor to champion the strategy



### 3/ SET UP A TEST PILOT

- ✓ Launch a cycling initiative, or a mobility budget for a test group
- ✓ Use feedback and data to refine the approach
- ✓ Celebrate the small wins to build momentum

Connected

Sustainable

Future-proof your own approach

Employee-centred

### SPIE's bike leasing program: over 300 orders in one month!



SPIE provides complex technical services for buildings, facilities, and infrastructures with a focus on a climate-friendly and digital future. When they introduced a bike leasing scheme, they were positively surprised by the speed and scale of growth this solution has achieved.

The program was successfully launched in March 2025, three months after preparations began. In the first month alone:

- over 300 bikes were ordered
- 200 employees were able to immediately benefit from them.

SPIE recognises this as an important step in their journey towards providing alternative and sustainable mobility solutions using bike leasing. When asked, their advice to other companies considering overhauling their mobility policies is:

« Don't wait, just do it! The approach does not have to be complicated, especially with the right partner. » says Like Bosboom-IJzermans, HR Manager at SPIE Nederland.



Only 2 months after the introduction of the mobility pass at Nickel, 90% of our employees had connected to the site and used the solution.

There is no longer any human intervention in the management of transport reimbursements, which used to take us a lot of time. It also allowed us to offer employees new possibilities for purchasing sustainable mobility packages, which we were unable to manage manually.

Julien Foucher,  
HR Manager at Nickel France.



## CONTACTS



LinkedIn



**Oana Duma**

Head of Arval Mobility Observatory  
email : [oana.duma@arval.com](mailto:oana.duma@arval.com)



LinkedIn



**Dan Boiangiu**

International Arval Consulting & Arval Mobility  
Observatory Director  
email : [dan.boiangiu@arval.com](mailto:dan.boiangiu@arval.com)