From now on
Mobility Boost, a new phase coming
This article aims at answering four questions:

1. What are the impacts of the current pandemic on new mobility stakeholders?

2. What impacts will the new macroeconomic scenario have on the establishment of new mobility models?

3. What are the first responses to the health and economic emergency formulated by the new mobility sector?

4. What are the opportunities still unexploited by this sector that could accelerate a full spreading of new mobility?
What are the impacts of the current pandemic on new mobility stakeholders?

The health emergency we are currently dealing with globally is quickly producing effects also on the economy. It is estimated that the current emergency will significantly affect the economy starting from 2020 already (Figure 1), with potential negative impacts on GDP in the EU and the U.S. that may range, according to the different scenarios, from -10% (worst-case scenario) to -5% (best-case scenario). However, the impact is expected to be more limited in China, where GDP is anticipated to remain even unaffected in the best-case scenario (-3%, +3%). The effects of the crisis will be felt also in 2021 on account of the expected slowdown in the global economy, with GDP ranging from 0 to -6%.

The new context is paving the way for a scenario in which all new mobility stakeholders (enterprises, citizens and the public sector) will be affected.

As concerns some of the sectors that play a role in the value chain of new mobility, the following can be observed:

- The Automotive sector has been particularly affected by the crisis. For example, in March 2020 only, new car registrations in the main European countries fell sharply: Germany (-38%), Spain (-69%), France (-72%) and Italy (-85.4%). Moreover, over 1.1 million European workers have been affected by the interruption of production activities, which means that over 1.2 million vehicles were not produced in March 2020 (namely 6.25% of the total number of vehicles produced in 2019).

- The crisis has affected also the transport sector: in Germany, for example, the financial impact of COVID-19 has had an effect on 87% of companies in this sector⁴, while in Italy 98% of fast trains has been cut⁵. New mobility players have also been affected as a result of the personal movement restrictions that have been introduced in all the countries hit by the pandemic. If we consider Car-sharing services, for example, Italy (one of the markets where this type of mobility has particularly developed) has recorded a 60% reduction in use, with peaks as high as 70%⁶. Similarly, the car rental segment in Italy recorded a sharp drop in new registrations in March 2020 compared to 2019 (-98% for short-term rentals, -80% for long-term rentals)⁷.

- An analysis of related sectors, such as the insurance sector, highlights once again the potential impacts that may be generated by this emergency. If, on one hand, this industry is benefiting from reduced use of vehicles (reduction up to -95% in the number of kilometers driven for recreational purposes)⁸ and consequently from a lower number of accidents (up to 80%)⁹, on the other hand, it is suffering from a marked reduction in car insurance renewals.

Fig. 1 - 2020 Forecasted GDP evolution following 3 scenarios

Source: Deloitte Estimation
(for example, in March 2020 third-party car insurance renewals in Italy decreased by 23% overall and by 86,1% in the case of newly-registered cars compared to last year13) and a plausible increase in competition on premiums. Against this background, some players have launched initiatives aimed at retaining customers and increasing brand awareness, returning to their customers part of the benefits obtained from reduced mobility (such as the reduction in the number of claims). For example, UnipolSai – a leading Italian insurance group with over 10 million “Motor” customers - is offering its customers the possibility of requesting through the company’s website a voucher amounting to one month of the annual motor insurance paid that can be used for insurance renewal14.

Citizens, too, have been affected by the crisis both from an economic and social point of view. Indeed, it has been observed that:

• The economic crisis generated by the COVID-19 pandemic will have an impact on the economic situation of European households. Indeed, 41% of households in Italy, 32% in the UK and 22% in France say they will be financially affected15. In Italy, namely, the first country to deal with the crisis in Europe, concern about losing one’s job is increasing: in less than one month it went from 21% (February 29) to 51% (March 13)16. Moreover, 81% of the population in the U.S. believe their life has changed dramatically and in general, only 1% have not experienced a radical change so far17.

• At the same time, the current situation is accelerating the process of digitalization among the general population. Indeed, citizens are increasingly inclined to use digital services both for personal use and for business. For example, in Italy, where e-commerce penetration is 7% (lower than in other European countries such as the UK where it reaches 30%)18, 57% of the respondents19 say they tend to use digital services more, and 75%20 of people who bought online in March say they had never done it before, in a context where e-commerce sales increased by 150% only in the week from 16 to 22 March19.

• COVID-19 will probably have an impact also on citizens’ mobility habits both in terms of reduction in travel frequency and the type of means of transport used, as people will increasingly opt for the options that ensure greater safety and not for the most cost-effective or environmentally friendly ones as they’ve done so far.

The new economic scenario will have impacts also on the public sector that fall into three macro-categories:

• The inevitable increase in the costs of public transport management:
  – The need to ensure social distancing on public transport will call for different ways to manage mobility demand, which may translate into an increased trip frequency on individual routes. This is already happening in several European cities, such as Hamburg20 and Bucharest21 where the number of daily trips of trains and buses has been increased. Another solution aimed at optimizing mobility demand is the development of queue management systems based on ticket reservation on demand; they have already been implemented in Beijing22 and Dubai23 where passengers can access, respectively, subway trains and local transport by “reservation”.
  – The need to ensure the safety of citizens through frequent sanitization of public transport vehicles (for example, every day Dubai employs 1,000 staff to clean and sanitize public transport24) and the installation of stalls for hand sanitizing before boarding public transport (Bangkok and Kochi in Rwanda have installed dedicated hand sanitizing stalls in public stations)25.

• An improvement of the transport infrastructure to ensure users’ safety given the expected increases in the use of some mobility solutions that are considered safer for the community (for example, a 67% increase in the use of bicycles was recorded in NYC only in March 202026). This is the case of Berlin27 and Bogotá28 where the cycling infrastructure has been extended.

The need to improve the public transport network is determined by an increased mistrust of public means of transport (which at the moment are not equipped to ensure social distancing) on the part of citizens, as clearly shown in Germany, for example, where the number of people using public transport has decreased by 80-90% since the beginning of the emergency29.

• The need to strengthen the collaboration between the public and private sectors to encourage full data sharing, which would help monitor and coordinate people’s movement while at the same time reducing the risks of infection. This is already happening in China, where a real-time individual tracking system, that relies on personal identity codes, developed in collaboration with Alibaba30, has been introduced. On the other hand, Italy is considering the possible options that would enable a controlled restart of the country’s economic activities. The Ministry of Innovation, the Ministry of Health and the National Institute of Health in Italy have opened a call for contributions addressed to private companies and focused on the identification of technologies enabling the development of a personal tracking and monitoring system to contain the risks of infection.31
Deloitte, through its Future of Mobility™ competence center, has developed a model that enables the outlining of four different future mobility scenarios. The time needed for these scenarios to become established may vary and they may even coexist.

The development of each scenario depends on two factors (Figure 2):

• The first factor, represented on the Y axis, is technology. Thanks to technology, vehicles become increasingly connected, even with the surrounding environment, and this enables their progressive automation and a gradual shift from a “driver-centric” to a “passenger-centric” logic.

• The second factor, represented on the X axis, is linked to the habits of transport users. Indeed, as purchasing habits increasingly change, car ownership becomes more and more obsolete and alternative options emerge enabling the exclusive (e.g. Long-Term Rental) or non-exclusive (e.g. car-sharing) use of the car.

What impacts will the new macroeconomic scenario have on the establishment of the new mobility models?
In the first scenario (“Incremental change”), increasingly connected vehicles owned and still controlled by the driver enable an easier and interactive driving experience.

The second scenario (“A world of sharing”) envisages consolidation of shared mobility phenomena. The gradual shift from ownership to shared use is complemented with a “hybrid” type of mobility, namely Long-Term Rental (LTR) schemes. Indeed, rental is a mobility option that reflects the needs of many users as it enables car possession without the constraints associated with car ownership.

The third scenario (“The driverless revolution”) represents the stage when autonomous driving becomes a viable, safe and affordable option but car ownership still prevail.

In the fourth scenario (“Shared autonomous”), autonomous driving and car-sharing converge.

The macroeconomic and social scenario shaped by the COVID-19 emergency may generate impacts on the two development paths characterizing the mobility scenarios.

As to technology, the following conflicting elements will play a key role:

- On the one hand, the digitalization “race”, driven by the new emergency context, could accelerate the development of new communications technologies (e.g. 5G), with possible positive impacts also on mobility services (e.g. innovative solutions to increase driver’s safety – Nissan’s Invisible to Visible combines information collected by vehicle sensors with traffic data and information about the surrounding area transmitted over the Internet and displays it to the driver using a 3D graphic interface providing him/her information on road conditions, traffic at intersections as well as potential hazards hidden behind buildings or curves)32.
  - On the other, the economic crisis currently experienced by the sectors related to mobility could lead automotive manufacturers to reduce the investment in R&D for new technologies, such as autonomous driving and vehicle electrification, and encourage them to use liquidity to support a relaunch of their core business. However, this phenomenon could be partially mitigated by regulatory intervention aimed at supporting the affected sectors and encouraging a planned “shift” towards sustainable mobility solutions; such intervention could leverage the present disruption and the increased attention to sustainability aspects and improve the aspects that have hindered the spreading of such mobility solutions until now (e.g. high price of electric vehicles, limited extension of charging infrastructures).

The current emergency will have effects also at the social level, thus accelerating and changing the evolution of mobility:

- The expected negative financial impact on households and enterprises will lead users to consider more favorably new mobility solutions that offer them more flexibility and certainty in their expense planning (for example, vehicle rental, instead of purchase, based on more flexible and innovative payment options, such as the “pay-as-you-go” mechanism).
Increased trust in non-traditional purchasing methods (e.g., digital payments via apps) could further accelerate the spreading and use of new mobility services, whose growth had already been forecasted by 45% of Europeans before the emergency started. The context is favorable as mobility services are already widely known, although still little exploited, by Europeans (for example, 70% of them are familiar with car-sharing, but only 7% use it regularly) and the current situation could stimulate greater use of these new solutions which respond to the emerging needs determined by the crisis (e.g., safety, flexibility, etc.).

Therefore, the COVID-19 emergency might have a twofold impact on new mobility services:

- It could accelerate the development of some vehicle sharing options that are still considered in their embryonic stage (e.g., micro-mobility solutions – kick scooter, bike and scooter-sharing, ...) and represent a safe and affordable way to move around cities (e.g., in China, three months after the virus outbreak, the use of bike-sharing services has increased by 150%).
- It could dramatically change the mobility solutions that are more consolidated but whose survival is now at risk, such as:
  - Car-pooling, a strongly increasing phenomenon that started in response to environmental sustainability needs but does not to comply with the new social distancing requirements.
  - Car-sharing, a mobility solution that has recorded a significant increase over the last few years (2014-2018). For example, the number of subscribers to the “free-floating” service has grown around six-fold in Italy, the number of fleet vehicles has more than doubled, and the average vehicle use per day has doubled [Figure 4]. If before the COVID-19 emergency this sector could be considered in the process of
consolidating, also from an economic viewpoint, and was expected to achieve economic balance already by 2020-21, today it can be expected that the impact of the emergency may delay the achievement of this goal depending on how the players respond to the emergency. Two scenarios may be assumed: if Covid-19 wanes during this year and car-sharing players respond to this situation with measures aimed also at ensuring passenger safety (e.g. through adjustments to the operating model such as vehicle sanitization, user experience optimization, ...), we expect that after some initial difficulties resulting from higher investments and a natural demand shock, recovery may start as early as 2021 and the breakeven point be reached during 2022; on the other hand, should the Covid emergency continue in 2021, its consequences would translate into a further negative impact on the income statement of the players in this sector and the breakeven point would probably be reached only at the beginning of 2023 when hopefully the health emergency will be only a distant memory.

- Rental services - both short and long term - will need to evolve their operating model and their offering to ensure options that are increasingly safe (for example, thanks to the implementation of vehicle sanitization systems for short-term rentals) and flexible (for example, thanks to the adoption of a “pay-as-you-go” approach for long-term rentals), together with access to premium services that are safe and enable cost savings.

The framework outlined is part of a context in which players continue to offer a wide and innovative range of services that meet the needs of citizens. The development and the success of the individual models will depend on the ability of players to identify and meet society’s emerging needs. This sector has great potential, especially as it has managed to transform our mobility habits over the last few years.
What are the first responses to the health and economic emergency formulated by the new mobility sector?

Inevitably, the new mobility sector will be impacted by the economic crisis caused by the COVID-19 pandemic. Offering fragmentation, the high number of small-sized players and the presence of business models that are still suffering economically could impact this sector in two ways. On the one hand, they could cause smaller players to disappear from the market in case no structural and economic intervention to support them is planned by the regulator, on the other, consolidation phenomena through M&A deals could be observed, involving also the public sector in some cases (e.g. mergers among small-sized players, acquisitions, ...).

However, players are responding to the present situation with actions that can turn a threat into an opportunity. The actions are mainly concentrated in three macro-areas:

• Active social involvement, thanks to which new mobility players can play a key role in the general response to the health emergency. Indeed, they complement and support the public transport sector as they cover the mobility needs of the categories that have been most affected by the COVID-19 emergency (e.g. healthcare sector, ...). This, for instance, is what Lyft has done:

Lyft, one of the major international ridesharing companies, offers free electric kick scooter rides to healthcare professionals, first-aid responders and transport workers in some US cities until April 30.

• Initiatives aimed at reviewing the operating model to increase the safety level of new mobility services, as in the case of Wheels:

Wheels Mobility, a German car-sharing company, has extended the car-sharing service area in some German cities, including also peripheral areas. This initiative is a response to the decreasing use of public transport also by residents in areas outside cities.

• Identification of strategies to support the use of public transport also during the emergency and, in particular: a review of the rules governing pricing (e.g. introduction of prices that incentivize the continued use of public transport by the same customer over longer periods) and accessibility to service (e.g. extension of the service to areas beyond municipal borders). An example of this approach is Miles:

Miles Mobility, a German car-sharing company, has extended the car-sharing service area in some German cities, including also peripheral areas. This initiative is a response to the decreasing use of public transport also by residents in areas outside cities.
The rapid spreading of the COVID-19 pandemic and its significant social and economic impacts force all industrial sectors to reflect on:

• The response given by companies to deal with the current emergency and to ensure business continuity.
• How to get ready for the restart, during which companies learn how to adapt to the new context.
• How to achieve a lasting competitive positioning suitable for the so-called “Next Normal”.

Therefore, companies need to develop a short to medium-term plan enabling them to deal with the emergency and organize the restart of activities in a way that is in line with the new social and economic context.

Even in this emergency period, new mobility is a strategic and interesting topic for all the sectors – even those that have not been traditionally related to mobility – that nowadays play a key role along the value chain (for example, the insurance industry, energy, ...). These players have the opportunity to further strengthen their position by offering new services and extending their presence (for example, through partnerships or M&A deals), also in light of the current situation. As a matter of fact, today over 70% of Europeans are already willing to buy new mobility services provided by players not traditionally linked to mobility [Figure 5].

For example, insurance companies could leverage their deep knowledge of the mobility habits of policyholders through technology and develop innovative mobility solutions with pricing policies tailored to the “profile” of each driver and dynamically adapted based on the driver’s history, travel patterns and driving style.

What are the opportunities still unexploited by this sector that could accelerate a full spreading of new mobility?

Fig. 5 - European citizens openness towards services provided by new players

6 out of 10 Europeans do not know the mobility offers of important service providers not traditionally linked to mobility

* do not exclude the possibility of buying from the following service providers

- Insurance
- Energy
- Tech
- Banking

Awareness of the operator

...are willing to buy services from service providers that are not traditionally linked to mobility

...do not exclude that these service providers are capable of offering mobility services

71% 81%
The energy sector, too, could exploit this emergency-related disruption to become a key new mobility player. This sector, in conjunction with the regulator, could develop a charging infrastructure to support and promote the use of sustainable mobility solutions. For example, it could deploy Vehicle-to-Grid (V2G) charging stations to make the charging network more stable and efficient, thus ensuring a significant economic advantage to customers (according to Nissan, up to €1,500 could be saved on the charging cost for a Nissan Leaf that covers 20,000 kilometers per year)42.

New mobility represents a valuable industrial element for players in this sector as well as an opportunity to grow through:

- Access to new revenue sources thanks to the introduction of new services associated with mobility.
- The use of data to improve the service.
- Upstream and downstream integration of the value chain to improve the level of service.

Thus, new mobility needs to remain high on the CEO’s agenda as it is an essential strategic tool for organizations in various industries that can be used to respond to the needs emerging in the different stages of this crisis:

- **Managing a Cash flow during a period of crisis** – Development of an offering that, in periods like this one, helps simplify cash management; for example, new mobility solutions for companies that, because of the emergency, have fleets that are underused or not used at all and stay in the parking lot for most of the time (e.g. pay-per-use rental solutions).
- **Maintaining customer loyalty and trust during times of uncertainty** – Development of new initiatives in favor of the community that increase brand awareness and allow the brand/company to come across as one that has actively responded during the health emergency, with potential benefits in terms of customer retention over the long term. In this regard, some car-sharing companies have included in the vehicle reservation app a special icon that shows how recently the vehicle was cleaned and sanitized43; another noteworthy initiative has been launched in Dublin, where a crowdfunding campaign has been organized online to support free-of-charge use of the bike-sharing platform Moby by healthcare professionals44.

### Managing supply chain risk and disruption

- **Development of new supply models enabling the companies that are facing tough times because of the COVID-19 pandemic to overcome constraints in production.** For example, the grounding of fleets has highlighted the need to think of innovative solutions that enable companies to “flexibilize” the cost-of-mobility structure according, on one hand, to the frequency of use (for example, through “pay-as-you-go” models) and, on the other, to patterns of use (30% of the cost of company cars is linked to driving behavior and 55% of this portion could be reduced by using telematics45).

Another example concerns the retail and catering sectors, which are facing a dramatic change in their business model that requires a changeover to the delivery concept. In this sector, new mobility players can play an active role and seize opportunities through targeted initiatives, such as:

- A revision of the operating model: for example, Felyx, a Belgian scooter-sharing company, has immediately updated its software and operating model to enable deliveries, making part of its fleet available to the most heavily affected companies46.

- The use of advanced technologies such as Artificial Intelligence and Robotics to support the development of a digital supply chain and overcome the challenges of the present situation. This is happening, for example, in the United States, where Starship Technologies, a manufacturer of autonomous robots for last-mile deliveries47, has recorded a sharp increase in orders over the last period.

### The heart of resilient leadership

- **In a situation of great uncertainty like the one generated by the rapid spreading of COVID-19, it is essential that CEOs and Management Teams become resilient and invest in the development of new distinctive features to create value not only for the company but also for society in general.** Mobility remains a strategic topic that plays a pivotal role in all stages of the crisis; therefore it is fundamental that all the players involved continue to monitor the market to seize the opportunities offered also during this emergency (for example, by considering potential acquisitions).

A response to the current crisis scenario should necessarily be combined with a system public-private intervention that enable a full relaunch of the mobility sector. Indeed, the latter plays a strategic role for country systems as it accounts for a large portion of GDP in the main European countries (for example, 20% of the GDP in Italy48) and is relevant to citizens (for 67%49 of Europeans mobility has a great impact on household finances).

Thus, initiatives should be launched by institutional and private players in order to stimulate the full development and use of new mobility solutions. These initiatives should be mainly focused on:

- Systems intervention.
- Offer-side interventions.
It is essential that institutional players understand their role as the flywheel of new mobility and consequently implement actions aimed at:

- Accelerating the development of new urban ecosystems by promoting synergistic collaboration between public and private sectors, while at the same time emphasizing the need for players to coordinate and share their data so as, for example, to manage traffic flows and citizens’ demand for mobility more safely and effectively.
- Reviewing the legislative framework to deal with the uncertainty generated by the emergency; incentives and stimulus packages should be introduced to support the most innovative players that provide services that are complementary to public transport and respond to the demand for mobility and increased safety in the medium term.
- Integrating public and private mobility services and making them:
  - Easily accessible to citizens (through the development of MaaS platforms, for example); indeed, 7 Europeans out of 10 consider ease of access to services essential, whereas 61%52 think it is important to have a single point of access to the various mobility services [Figure 6].
  - Affordable and flexible in terms of pricing, envisaging a gradual transition from “fare-based tickets” to “all-in-one tickets” that allow users to access all the services available in the urban/regional area. Indeed, 40%53 of Europeans are interested in using mobility services if “all-in-one” packages are offered [Figure 6].
  - Stimulating an integrated use of public and private services through communication campaigns aimed at incentivizing mobility options that are affordable and safe for citizens, so as to ease the burden on local public transport and reduce the need to enhance public infrastructure.

At the same time, private players can immediately encourage the change already underway by identifying concrete strategies and interventions that respond to the needs of citizens and starting actions aimed at:

- Reviewing the operating model for service provision, introducing monitoring systems that ensure the safety of the users of new mobility services.
- Adopting pricing methods that respond to changing needs in this specific period, increasing the flexibility of solutions while ensuring service cost-effectiveness.
- Enhancing technological infrastructures so as to guarantee increasingly higher data generation to support the community, e.g. through demand tracking to ensure greater accessibility to and safety of the services.
- Extending service accessibility also to areas beyond municipal borders, especially at a time when there is widespread distrust of traditional means of transport such as trains, subways and buses.
- Investing in brand awareness also through indirect communication campaigns that support the country system; for example, provision of mobility solutions with dedicated rates to players that deliver key services.
- Considering options to enhance their position within the value chain by leveraging their assets and capabilities and evaluating the integration or partnerships with other players, even in related sectors (e.g. insurance, energy, ...).

In this context of great uncertainty, the good news is that many of the trends described are already happening, also thanks to the initiatives undertaken and the investments made by public institutions and private players in various industries. The disruption resulting from the current emergency opens up new opportunities for companies interested in playing a role in this sector. It is therefore essential that companies can rely on technological assets and ready-to-use solutions that support and encourage the process of innovation and business transformation. These solutions would generate value for all stakeholders: for the service providers (e.g. new sources of revenue, increase in customer retention, ...), for service users (e.g. increased level of safety, cost savings, ...) and the community in general.

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**Fig.6 - Users must be able to easily access mobility services, especially through “all-in-one” packages**

For Europeans it is important to have a single access point that integrates different services...

- 61%...and they are interested in “all-in-one” packages valid for different mobility forms

For Europeans 7 out of 10 consider the ease of access to the service as an essential element.

- 61%
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