

# VEHICLE SHARING START GUIDE FOR NGOs



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# Our Strategy 2023-2028

## Sustainable transport for a better world

### ABOUT FLEET FORUM

Fleet Forum is the world's only not-for-profit organisation dedicated to cleaner, safer and more effective humanitarian transport in developing nations.

Our members include (international) non-governmental organisations, United Nations agencies, Red Cross/Crescent organisations, commercial fleet operators and mobility product and service suppliers. Through professional fleet management, we help our members to deliver life saving and life changing aid to communities in need.

### THE WORLD WE WORK IN

The global climate and ecological crises, conflict, inequality and the Covid-19 pandemic have all made the world we work in more complex in the last six years since the UN Sustainable Development Goals (SDG's) were adopted. Meanwhile, technology offers opportunities to innovate and work differently. Fleet Forum is here to bring together aid and development organisations with transport and mobility experts to tackle these global challenges and benefit from new ways of working.



#### Expanding sustainability:

Environmental, social and financial sustainability is core to professional fleet management. We will define and celebrate sustainability best practice to inspire others and drive progress.



#### Towards mobility management:

We will develop our expertise to support members' transition from managing vehicles to mobility management, to benefit from solutions like vehicle sharing.

### ACKNOWLEDGMENTS

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Fleet Forum wishes to extend its gratitude to USAID Bureau of Humanitarian Affairs who made this project possible. The guide will be reviewed based on ongoing learnings and its review will be published in amended versions.

Users are responsible for the correct application of the information provided in this guide. We would like to thank Terre des Hommes, Action Against Hunger and Medecins du Monde for their active participation in the project and IRC and Acted for their valuable contributions to this guide.



## IN A NUTSHELL, WHAT DO I NEED TO START SHARING MOVEMENTS?

DO I NEED...?	RESPONSE...
An opportunity	Yes / You need to have identified shared movements opportunities (concurrency of journeys, airport drops...)
A clear objective	Yes / Ex: share movements, reduce costs, reduce co2, reduce empty seats...
Willingness to bring change to my organisation	Yes
Readiness to fail	Yes
Time	Yes
Patience	Yes
Leadership	Yes (project coordinator, project focal point)
Participating agencies	Minimum 2 (for a start)
1 focal point per agency	Yes, (motivated, willing to make it happen, clear about the objective)
Senior management endorsement	Yes, (but not necessarily a must-have for starting)
Participating agencies' weekly movement plans	Yes
Money	Not necessarily
Technology	Not necessarily

## 1 - DEFINE YOUR OBJECTIVES

### 1.1 - SUGGESTIONS OF PROJECT GOALS:

- 1-Increase fleet cost effectiveness
- 2-Reduce environmental footprint fleet/transport of humanitarian operations
- 3-Reduce road traffic crash risk

### 1.2 - SUGGESTIONS OF SUCCESS CRITERIA:

Critical size: At least 2 organisations committing to the initiative and allocating resources to it

Costs: The vehicle sharing initiative generates costs savings

Sustainability: The vehicle sharing initiative generates a reduction of Co2 eq. and other negative externalities (traffic, noise, pollution...)

Operational effectiveness: is ensured/maintained (compared to pre-sharing setup)

Resources optimisation: resources allocated to the sharing modality are less than those required at pre-sharing stage

Continuity: The initiative is continued after a period of XX months after its start-up

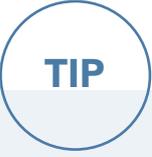


## 2 - SETUP YOUR PROJECT MANAGEMENT STRUCTURE

### 2.1 - ROLES AND RESPONSIBILITIES

Here are suggestions of roles and responsibilities:

ROLE	RESPONSIBILITIES	SKILLS
<p><b>Project Coordinator</b>  <a href="#">See Annex 09 for suggested ToR</a></p>	<ul style="list-style-type: none"> <li>- facilitates/animates the project</li> <li>- ensures alignment with objectives</li> <li>- reminds focal points about their deliverables</li> <li>- proposes next steps</li> <li>- identifies issues</li> </ul>	<ul style="list-style-type: none"> <li>- team player</li> <li>- leadership</li> <li>- sense of result</li> <li>- collective intelligence</li> <li>- change management</li> <li>- fleet management/logistics (a plus but not compulsory)</li> </ul>
<p><b>Focal points</b>  <a href="#">See Annex 09 for suggested ToR</a></p>	<ul style="list-style-type: none"> <li>- represent their organisations</li> <li>- dedicate time/resource to the initiative</li> <li>- share key information on time (movements plans...)</li> <li>- ensure their organisation's homework is done</li> <li>- solicitates other department from their organisations (finance...)</li> </ul>	<ul style="list-style-type: none"> <li>- team player</li> <li>- fleet management/logistics (a plus but not compulsory)</li> <li>- committed and perseverant</li> <li>- collective intelligence</li> </ul>
<p><b>Sponsors</b>  <a href="#">See Annex 09 for suggested ToR</a></p>	<ul style="list-style-type: none"> <li>- provide backup support to the focal point in order to move actions within the organisations that are not fully under its scope of responsibility (senior management mobilisation, change management, staff engagement, other departments involvement...)</li> <li>- supports the project buy-in within each organisation participating</li> <li>- guarantees that the project is not simply left to be a logistics/ fleet management task but that is strategically placed in the organisation</li> </ul>	<ul style="list-style-type: none"> <li>- willing to support change management</li> <li>- capacity to interact with other management layers (hq, senior management...)</li> </ul>

 TIP

### Logistics only?

Bare in mind that although such initiative can be initiated unilaterally by logisticians or fleet managers; it will have to involve at some point key stakeholders within the organisation in order to gain scale, acceptance and drive the change.

## **2.2 - SETTING SHORT TERM SPECIFIC OBJECTIVES:**

Here are some suggestions of short term (2-3 months) specific objectives

- 100% MoU signed by current participating agencies by end of XXX
- Cost model mechanism and modalities closed/agreed by end of XXX
- 100% of agencies share their movement plans every Friday (allowing proper identification of shared movements for the following week)
- At least 1 shared movement is implemented per week
- All participating agencies implement at least 1 sensitisation session per month about the initiative, covering at least 20 staff per session
- At least 3 more agencies are joining the initiative by end of the XXX

## **2.3 - MEETINGS AND COMMUNICATION**

Suggestions:

- Set up a weekly meeting in which advancements and situation reports are discussed as well as next steps
- A WhatsApp group can be created in order to ease smoothness of communication
- A shared working space can be provided from one of the participating agencies allowing centralisation of information and documents (ex: MS TEAMS thread)



### 3 - IDENTIFY THE PROJECT MINDSET / APPROACH:

#### TIP

Baby steps: having the 1st movement implemented is the most important, once this is done, our learnings are that things go easier, you therefore need to focus on that 1 objective.

The different approaches/mindset presented below can be representative of one or several of the agencies participating to the project, the different approaches can therefore live together in the project, it is essential to be flexible while dealing with different work cultures while simultaneously trying to create the projects' own approach/identity.

#### 3.1 - THE BUREAUCRAT APPROACH:

In the case you evolve in a rather procedure-oriented environment, you might want to have the initiative framed by a document such as MoU ([see Annex 01](#)). That could help reassuring stakeholders/managers/logisticians that the initiative they are engaging into is 'safe'.

## ! LESSONS LEARNED

Never forget the main objective: share movements!

Some agencies may need to be reassured with an operational framework such as a MoU, but their reassurance is not a guarantee that they will engage practically into action. You need to find the right balance between reassurance and practical action.

Our experience: Agencies the most demanding for the MoU before engaging concretely into sharing movements are in the end the one not having signed the MoU, nor engaged into sharing...

### 3.2 - THE RISK MANAGER APPROACH:

You identify and list the threats to sharing movements between NGOs and identify their respective level of risks. Using a simple benchmarking table is good enough ([See Annex 05](#)) to compare agencies practices and set minimum requirements for topics such as insurance, how to deal with mechanical issues, visibility and reputation, etc.

For security and safety risks this exercise should be done with the participation of safety/security focal points of participating agencies and ensure that they are in the mindset of 'making things happen' and not only identifying the red flags of vehicle sharing between NGOs. Project sponsors can play a crucial role in making this happen (see 2.1).

See [Annex 02](#) for minimum requirements.

## ! LESSONS LEARNED

- All agencies have rather identical protocols and approaches.

Despite having different mandates and organisational cultures, NGOs are overall implementing the same standards (security and safety management, vehicles maintenance, driver's recruitment...) therefore the residual level of risk involved by stepping into another agency's car is low.

### 3.3 - THE LET'S DO IT APPROACH:

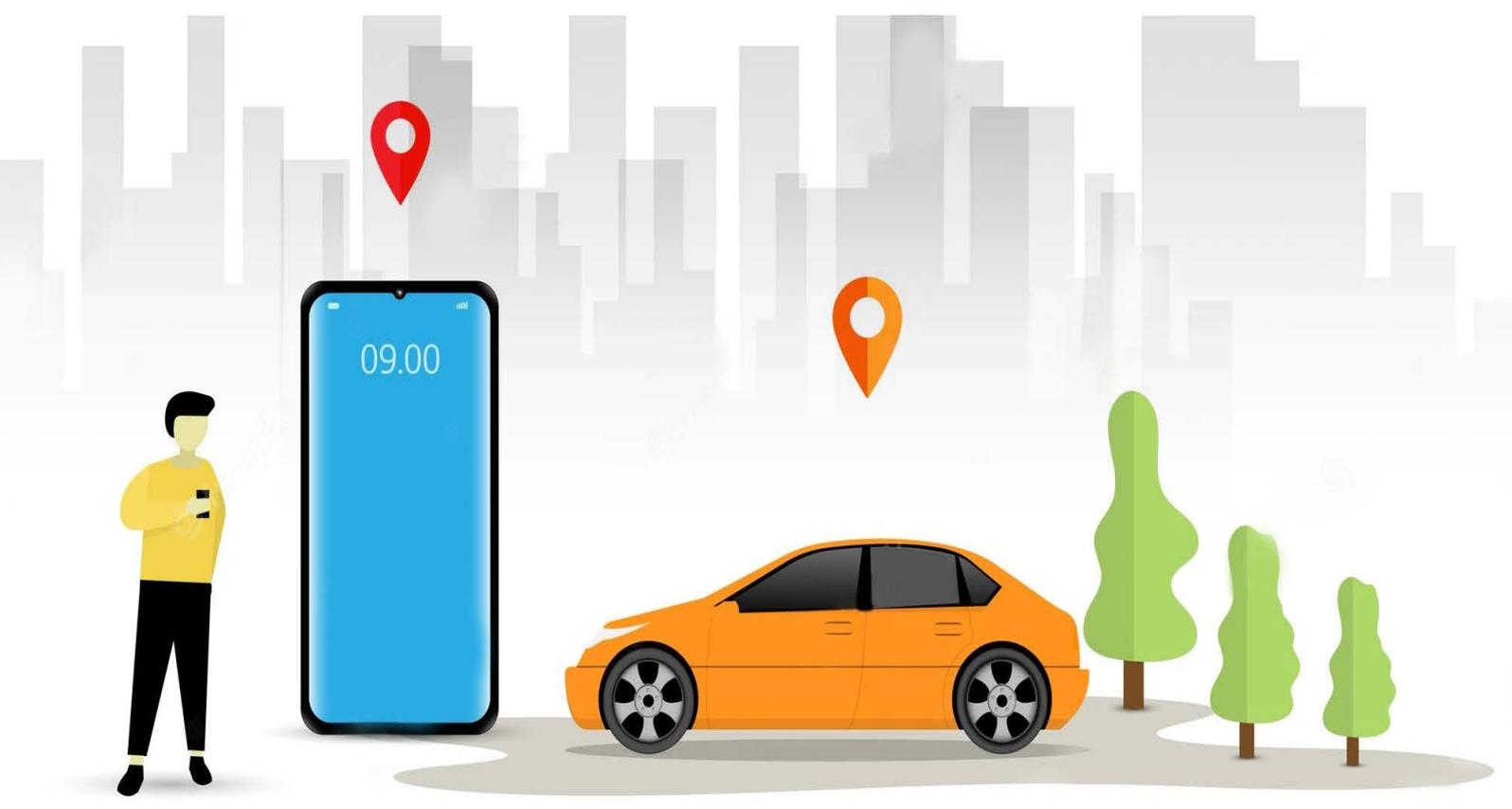
You can make the choice of being opportunistic and decide to take the occasion of any potential shared movements to make it happen first and learn from it accordingly. This angle definitely translates and/or requires a strong personal/institutional commitment to the project objective, but it can reveal very effective compared to more conservative approaches.

#### ! LESSONS LEARNED

- Probably the most stimulating/rewarding approach as you are already sharing movements meanwhile framing your initiative to scale up, learning from action is way more meaningful than triggering action from policies/standards.

#### **Quote from participating agency's logistics coordinator:**

'From our side we want to focus on sharing movements, on a solidarity approach for now, costs recovery is not the main priority at this stage.'



## 4 - TAKE ACTION / ENGAGE PRACTICALLY

### 4.1 - SHARING MOVEMENT PLANS

Identifying concurring journeys: comparing the weekly movement plans of the participating agencies allows identify joint movements opportunities and empty seats where passengers can be allocated in another agencies' vehicle.

Low-tech: in order to compile effectively each participating agency movement plans, you can make the use of a shared excel file on a shared drive ([see Annex 04](#))

High-tech: some interagency booking solutions exist on the market and can come in handy once your project get at scale, however, they involve cost so you might want to focus on achieving a high number of shared movements before roll-out such a technology ([see Annex 10](#) for the booking solution specs used in the Lebanon initiative).

### ! LESSONS LEARNED

The technology supporting the agencies' movement plans comparative review (find concurrencies, opportunities for sharing movements...) is not important at the early phase, what is important is that it's being done (white board, excel file, shared table online...).

### 4.2 - SHARING THE 1ST MOVEMENT

If patterns of movements are highlighted during the movement plans comparison, you can decide either to share movements ad hoc, or establish a systematic movement with predetermined frequencies (shuttle, one every second day...)

Shuttles: in order to be effective, they involve to establish a meeting point and a departure time and such thing can be difficult to establish as it involves changing certain habits.



#### **4.2.1 - IDENTIFY AND ASSESS A PICK UP POINT**

This can be done by mapping participating agencies office locations and triangulate the optimal meeting point between them (in some circumstances that results in promoting walk to the meeting point from the office among staff), selecting the meeting point involves ensuring parking space availability at the meeting point so staff can park directly there. It also requires to be a safe area (not just on the side of the road...).

#### **4.2.2 - INFORM AND BRIEF THE PASSENGERS**

Informing the passengers and answering any of their questions is essential to get buy-in, asking their feedback at the end of the journey is also important.

#### **4.2.3 HAVE CLARITY ON WHO TRACKS THE MOVEMENTS**

Having the agency providing the vehicles tracking its own movements makes sense.

#### **4.2.4 - RUN THE LESSONS LEARNT AND ESTIMATE THE SAVINGS GENERATED EXERCISE FROM THE 1ST MOVEMENT**

Capture the passengers impressions and suggestions, as well as the drivers and fleet managers and take mitigation actions if necessary. A simple calculation can allow you to get a sense of the meaningfulness of the shared movement, may it be in financial term (vehicle running cost, cost per km, driver...), environmental (reduction of greenhouse gases emissions, noise...) or public health (less cars on the road= less accidents, less emissions = less premature deaths linked to particulate matter.

## ! LESSONS LEARNED

Calculating the savings from your first shared movement allows you to estimate the potential for savings if shared movement are scaled up, it makes a very factual argument that will be heard by senior management in order to promote the initiative.

## 5 - SETTING-UP AN OPERATIONAL FRAMEWORK

### 5.1 - MEMORANDUM OF UNDERSTANDING (MoU)

See MoU template in [Annex 01](#), it was developed in coherence with the project principles: saving resources, being efficient. Depending on the agencies involved in the initiative, this stage of signing a MoU is not necessarily seen as compulsory: you should keep eyes on your objective of sharing movements and decide whether the MoU is a step towards achieving this objective, or not. In the perspective of scaling-up shared movements, an MoU however seems to be a compulsory step at some point in order to ensure alignment of different participating agencies.

### 5.2 - MINIMUM REQUIREMENTS

In order to ensure a harmonious and consistent quality of service delivery, we recommend to set minimum requirements to which agencies have to comply to if they join the initiative, particularly for those providing vehicles. Among other things it helps set standards on topics like insurance, driver's training, vehicle maintenance, security protocols. [See Annex 02](#).

### 5.3 - SECURITY/SAFETY

For very good reasons, the project will be challenged on the safety point of view. It is therefore important to involve the security/safety focal points of the organisations at an early stage, explain them the project objectives and involve them/ ask them for support to make it happen.

Bear in mind that although risks identified at first glance are linked to road crashes and protocols from other agencies, the initiative contributes to have less vehicles on the road, so therefore less probability of crashes, not to mention the public health benefits.

## 5.4 - STANDARD OPERATING PROCEDURES

Meant to capture the day to day tasks involved by vehicle sharing (day of movement plan compilation, roles and responsibilities of dispatchers) this living document allows smooth onboarding of new agencies. [See Annex 03](#)

## 5.5 - COST SHARING

### 5.5.1 - FIRST THING FIRST

Although the outcome of sharing movements is to reduce fleet operating costs and reduce environmental footprint, we would recommend to focus first on actually sharing movements. Actual savings can only happen when the shared movements are at scale. It is only then when you can achieve a reduction in kilometres driven and/or to reduce the size of the overall fleet of all participating organisations.

In the case you want to look from a more financial angle at what type of journeys should be allocated to vehicle sharing project, The Transport Cost Optimisation Tool, enables users to get insight into the optimal mix of transport modes for passenger transport by inputting summary historical data for any period of time (one day, one week, one month etc.). It allows users to compare their current state to the optimal one to gauge efficiencies and use the outputs of the tool to make decisions: <https://knowledge.fleetforum.org/knowledge-base/article/transport-cost-optimisation-tool>



### 5.5.2 - COST SHARING METHOD

The development of a cost model allowing allocation of movements costs to users is compulsory to the fairness, sustainability, reliability, accountability and transparency of the initiative.

With acknowledgement to the UNHCR carpooling project whose pilot was successfully achieved in Lebanon (and now continued as business as usual), their cost model matrix, driven by the principle of full cost recovery, was adopted by the initiative and can be found in [Annex 08](#).

The model is based on the TCO (total cost of ownership) approach, at initial stage it is therefore necessary to capture all data to calculate TCO to split cost recovery by agency.

The TCO defines all the costs of owning a vehicle from the time of purchase by the owner, through its operation and maintenance to the time it leaves the possession of the owner. You can access the Fleet Forum's TCO calculator here: <https://tco.fleetforum.org/#/vehicle-selection> and some additional materials here: <https://knowledge.fleetforum.org/knowledge-base/article/total-cost-of-ownership-in-practice>.

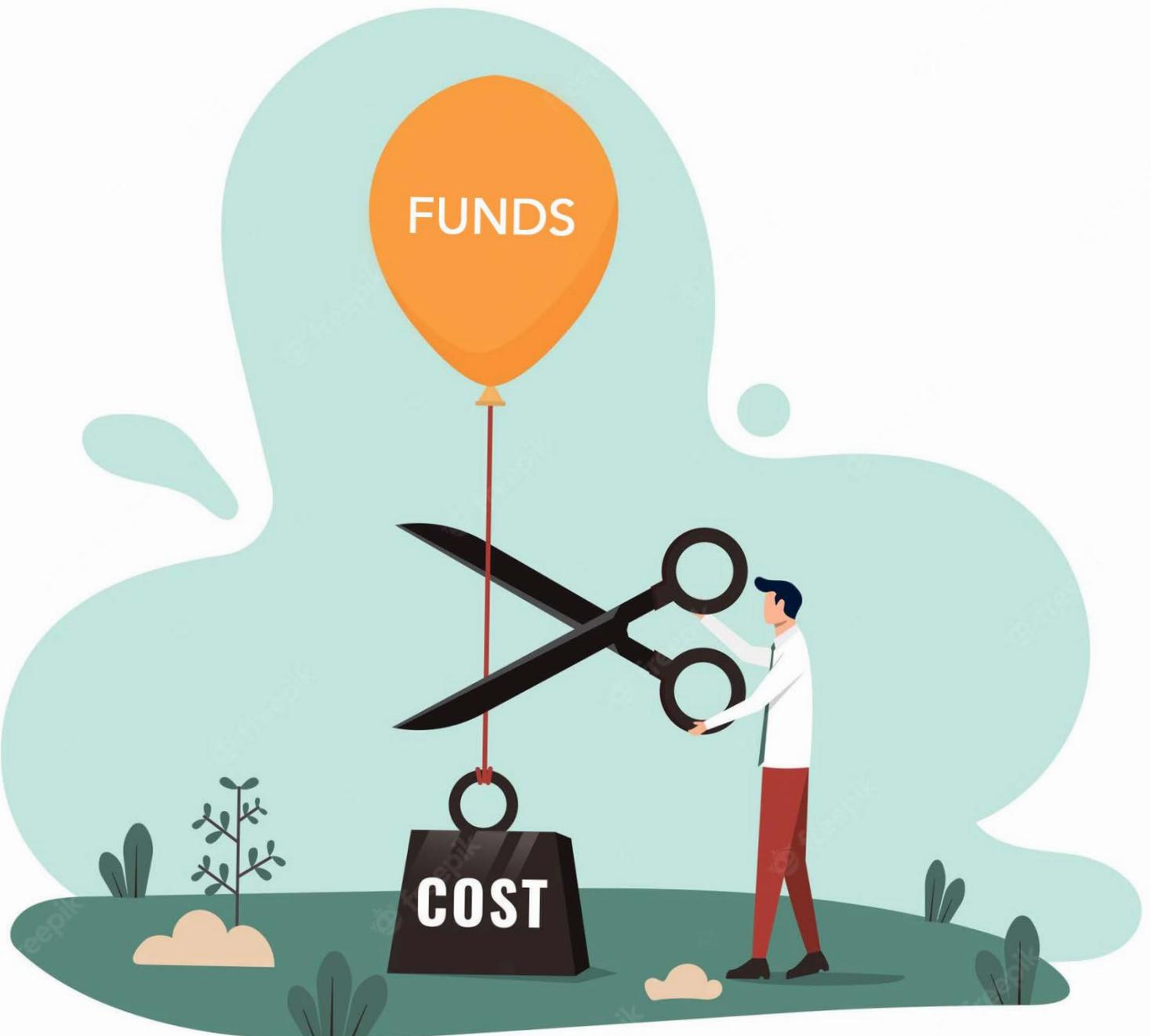
Agencies will have to determine the best modality they want to adopt (or can adopt depending on the country of operation) to charge their costs to each other: one option could be monthly invoicing, or keeping balances/track of expenditure and asking agencies to pull more resources than others on a certain period of time in order to compensate credits.

## ! LESSONS LEARNED

At this stage of the project, it's essential to involve the finance manager of all participating agencies, they have to understand the project and what the expectations are in order for them to provide the most suitable solutions, they are also key in making sure feasibility and legal frameworks of inter-agency invoicing.

**Quote from finance coordinator of participating agency:**

'I am so glad to see an opportunity to reduce our support costs and make a better use of our funds for beneficiaries, it's rather unusual but very welcome..'



## 6 - DRIVING CHANGE

The successful baby steps made in the beginning are the best tool to promote the initiative and scale up the number of shared movements. As mentioned in 4.2.5, documenting the benefits and their potential is also key to success.

### 6.1 - STAKEHOLDERS INVOLVEMENT

Although the project looks at first sight as a simple logistics/fleet management challenge, it's in fact broader than that: by touching to staff and project mobility, we are directly touching the current humanitarian delivery model. Vehicle sharing is therefore a broader challenge than what it initially looks like.

#### 6.1.1 - AT HUMANITARIAN COMMUNITY LEVEL

##### **Top 8 change reluctance**

We have identified the following trends why NGOs are reluctant to practically engage into the project and sharing movements:

REASON FOR RELUCTANCE	DETAIL	MITIGATION
Security/safety concerns	Crash management, security protocols	<ul style="list-style-type: none"> <li>- Involve security focal points in the project development</li> <li>- Ensure security/safety protocols are benchmarked if needed</li> </ul>
Administrative framework	Presence of a MoU	<ul style="list-style-type: none"> <li>- Come up quickly with a 'legal framework' if needed</li> </ul>

Continues on the next page:

REASON FOR RELUCTANCE	DETAIL	MITIGATION
Accountability	Cost sharing, eligibility of costs by donors	<ul style="list-style-type: none"> <li>- Set initial objectives that focus on action (share movements)</li> <li>- State that no costs will be involved under a certain scale of shared movements</li> <li>- Open the topic of cost sharing with participating agency but don't let it impede movements sharing</li> <li>- Involve Finance managers of participating organisations at an early stage</li> </ul>
Reputation/visibility	Display of logos, being assimilated to another organisation	<ul style="list-style-type: none"> <li>- Benchmark agencies visibility policy</li> <li>- Leave space to agency to not collaborate everywhere</li> </ul>
Wait and see	The initiative is not functioning yet, I will engage my organisation once it's up and running	<ul style="list-style-type: none"> <li>- Remind agencies that this is an exploratory project aiming at reducing costs and environmental footprint: the more we are to explore, the less chance we have to fail</li> <li>- Involve the country NGO coordination mechanism: that can allow to limit the 'prisoner's dilemma' where all agencies wait and see others to engage before engaging themselves</li> </ul>

<b>REASON FOR RELUCTANCE</b>	<b>DETAIL</b>	<b>MITIGATION</b>
Solutionism	What they say is: We want something ready to use, not having to contribute to its design/development	<ul style="list-style-type: none"> <li>- Try to have agencies and participating staff embracing complexity instead of looking for easy solutions, that goes with building understanding in the audience about challenges involved by transitioning to less emissive transport: there are several angles but none is a silver bullet, the way forward will involve complex decisions and arbitrations</li> </ul>
Uniqueness	What they say is: We have special needs that impede us sharing rides with others	<ul style="list-style-type: none"> <li>- Get the buy-in from senior managers first and get their support to counter these arguments</li> <li>- Remind agencies to look at the broad picture and not narrow immediately things to details and special cases</li> <li>- The way around, remind agency that even if they can't make use of the project at scale, a small use is still a relevant use (cost reduction, footprint reduction)</li> </ul>
Contradicting behaviour	What they say is: This is a great initiative. What you see is no participation	<ul style="list-style-type: none"> <li>- Remind agencies that they have to walk the talk of their environmental commitments and financial efficiency commitments</li> </ul>



### 6.1.2 - AT PARTICIPATING AGENCIES LEVEL:

You should stimulate simultaneously the different management levels of the participating agencies: field practitioner level, country operations senior management, HQ referent and greening focal points...

We have identified that the following stakeholders have to be involved at some point in the implementation of the project:

- **Logistics department / procurement:** naturally the cornerstone of the project, but don't underestimate the changes such project involves for logisticians/fleet managers who are used to manage their fleet individually. A vehicle sharing project is in a way challenging years of their fleet management practice.
- **Security/safety officer:** safety concerns being one of the questions to be raised when initiating such plans, their involvement and participation is key, bearing in mind that they should be contributing not as 'setting red flags' only but more as contributing to overcome those.
- **Country representative:** change involved by vehicle sharing are going way beyond pure fleet management, it touches intervention models, country representative need to support and push for the initiative.
- **HR department:** in order to support the dissemination of new modality of departure and/or movement planning.

- **Finance department:** as vehicle sharing might involve cost sharing at some point, involvement of finance colleagues seems inevitable in order to have the best solution identified to its specific context.
- **HQ:** sharing being a rather new modality, seeking support from HQ can result handy, so the field practitioner feel they have the space for this exploration of new fleet usage.

### **Quote from country director of participating agency:**

'The project ticks several boxes that are very much in the air: costs optimization, reducing environmental footprint, my HQ is more and more demanding on those topics and I have a nice opportunity to demonstrate that my country is moving forward concretely on those topics'.



## 6.2 - CHANGE MANAGEMENT TOOLS:

**Tools:** PPT ([Annex 06](#)), Q&A ([Annex 07](#))

### **Staff sensitisation sessions:**

Using the visual support mentioned here above, it is essential that staff from participating agencies are made aware about the project, its reasons, what it changes for them. Organising group sensitisation sessions is important in the process of managing change and answering their questions and doubts.

### **Change management workshop:**

Organising a dedicated training session on change management among participating agencies, focal points and sponsors can support their respective internal challenges to drive change and identify key stakeholders, messages and tactics.



## 7 - SCALING-UP? WITH WHAT CRITERIA?

Achieving scale seems an important condition to actually achieve costs savings and environmental footprint reduction: as explained in this document, it is scale that will allow to reduce the overall size of the participating agencies fleet and reduce the total number of kilometres driven.

We have identified the following criteria to be considered in order to scale-up:

- **Management / institutional commitment:** although the initiative could perfectly start among a very small group of people willing to make a positive change, gaining scale necessarily involves onboarding key sponsors to the project and setting sharing/pooling as an institutional modality. Country senior management and regional/global level has to get involved in order to simultaneously trigger/push for change but also provide backup.
- **Paradigm shift in fleet management approach:** it is compulsory that logisticians/ fleet managers include vehicle sharing as a core solution in their management and don't see it as side objective 'we'll do this exotic thing once in a while for fun'. In that sense, agencies should aim at adapting their fleet management policy and procedures.
- **Common benefits vs individual benefits:** with reference to the 'prisoner's dilemma', onboarding new agencies has a lot to see with convincing them of the benefits of working together instead on leaning on its individual ways of working: saving costs and CO2 emissions can happen more easily if we pool altogether than if agencies try to optimise on their own.
- **Cost sharing:** (see also section 5.4) although cost recovery might not be an immediate objective of the project in the beginning, it's important to have thought about it once you reach the 'scaling-up' stage as onboarding more agencies and increasing the number of shared trips calls for a fair allocation of costs.
- **Booking system:** (see also section 4.1) identifying shared movement opportunities while the initiative is starting up can be done with basic tools, having to manage a big quantities of trips request might however require to put other systems and tools in place, not only for the purpose of managing bookings but also to track costs allocation.
- **Donors compliance:** while donors and public opinion requirements on sustainability is growing, it is important that the program staff are aware of it and include it in their donors proposals, may it be to simply acknowledge its benefits (costs optimisation, coordination...) or to explain the interagency costs ventilation it implies.

## 8 - VEHICLE SHARING IS ONLY ONE OF THE STEPS TO REDUCE EMISSIONS

Vehicle sharing is one of the levers of action to reduce fleet and transport emissions. Of course, its impact will be more powerful if implemented alongside other actions, here below you'll find a list (non-exhaustive) of actions to be triggered to reduce the environmental footprint of your fleet:

- **Reduce total number of kilometres driven:** reducing transport demand is a key lever to greening your fleet operations, but also one of the most difficult as it involves social behaviour changes and can question our current model of intervention based on a high level of mobility (monitoring visits, back and forth on the field...)
- **Promote vehicle sharing for staff commuting:** emissions induced by employee's movements between their place of residency and place of works accounts for your organization carbon footprint under scope 3 (indirect upstream emissions). Taking concrete actions into promoting carpooling during those movements therefore contributes positively to reducing your overall footprint.
- **Promote modal shift:** some of the journeys currently done using a vehicle can potentially be done with other less emissive modes of transports (cycling, public transport, walking...): review your movements patterns and be aware of what type of alternative offers your context of operation.
- **Procure/use/rent smaller/lighter vehicles:** smaller vehicles require less energy to be put in motion, therefore reducing fuel consumption, costs and emissions.
- **Reduce speed:** higher speed means more energy consumed, limiting and/or reducing speeds mechanically contributes to not only reducing costs and emissions, but also has a positive effect on road safety.