



WRI INDIA | SUSTAINABLE  
CITIES

# NEW MOBILITY TRENDS

*An overview – January 2016*

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# WHAT ARE THE TRENDS IN NEW MOBILITY VENTURES IN INDIA?

## Shared Mobility

*is creating new markets*

- Ride Share / Car Pool
- Vehicle Share
- Park Share

## Ride-sourcing Platforms

*are disrupting informal markets*

- Car
- Auto rickshaw
- Van/Bus

## Commuter Experience

*is driving new businesses*

- Driver Training
- Transit Apps
- Easy Payments

## Product Innovation

*is changing human behavior*

- Vehicle Design
- E-Mobility

## Connected Mobility

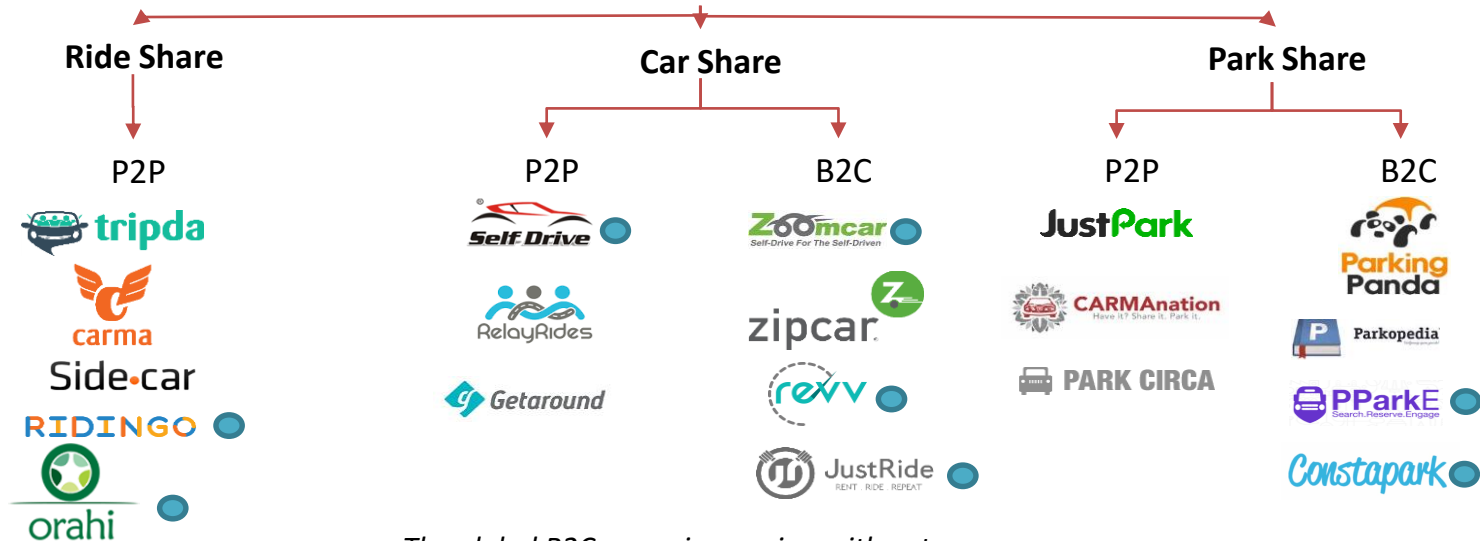
*is optimizing systems and processes*

- Fleet Management and Vehicle Tracking
- Connected Cars / IOT

market potential | stakeholder analysis | business model | barriers | enablers | impact analysis

# TREND 1 – SHARED MOBILITY

## Shared Mobility *is creating new markets.*



Ride Sharing is evolving but continues to have low ridership. Global companies BlaBlaCar and Tripda have entered India.

The global B2C space is growing with entry by Hertz, Enterprise Rent-A-Car, Avis, Daimler, BMW and U-Haul. This market is still nascent in India. However, the self drive car rental place is an upcoming one.

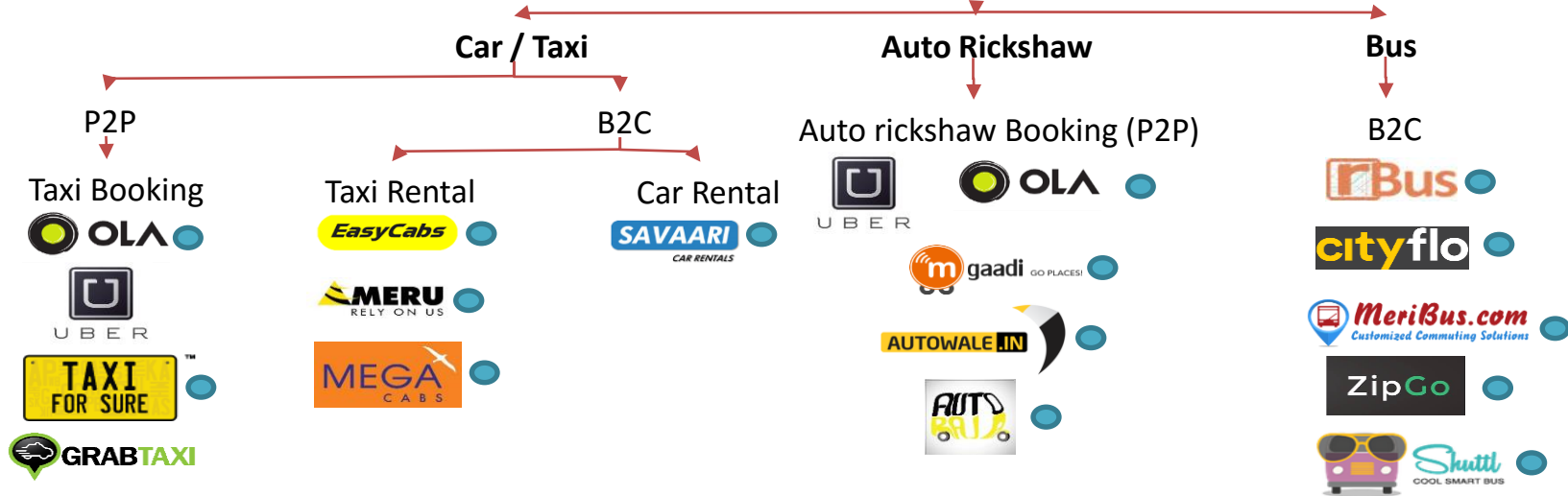
Park Sharing is in early stages in India. While there are some B2C models aggregating parking spaces and offering on demand valet, there are currently no P2P models.

● Indian company

# TREND 2 - RIDESOURCING

## Ride-sourcing Platforms

are disrupting informal markets.



Though mired in regulatory issues, P2P models are well developed in India. Ola Cabs bought TaxiForSure for \$200 million in a cash and stock deal— the second-biggest ever in India’s fledgling startup world in 2014.

Auto Rickshaw aggregation is still in early stages in India but is gaining scale via growing startups and inclusion of rickshaws on the Ola and Uber platforms.

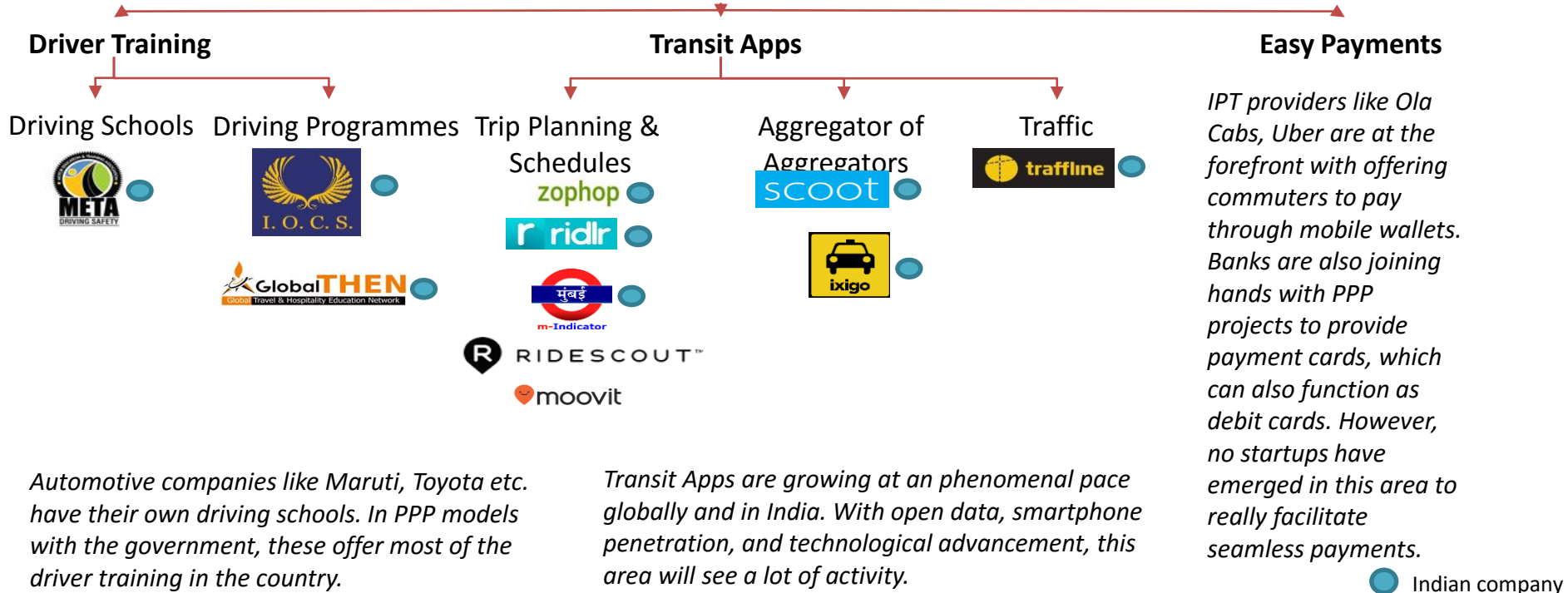
Bus aggregation is an upcoming space which has attracted the attention of entrepreneurs and investors alike.

● Indian company

# TREND 3 – COMMUTER EXPERIENCE

## Commuter Experience

*is driving new businesses.*



# TREND 4 – PRODUCT INNOVATION

## Production Innovation

*is changing human behaviour.*

### Vehicle Design

*With new design and materials being used in bicycles, helmets, cars and new technology like autonomous cars, self parking etc. being integrated in cars, this space will grow slowly but surely.*

*Though there are no Indian startups working in vehicle and accessory design in India yet, with the Government's focus on smart cities and road safety, one should see growth in this space.*

### E-Mobility

#### Conversion Kits




#### 2-wheelers



#### 2/3/4 wheelers



*It is estimated that if India's electric vehicle market takes off, INR 40,000 crore worth of fuel will be saved. The Government's Mission Plan 2020 envisages demand incentive scheme for faster adoption of Electric Vehicles which makes this space worth looking out for.*

 Indian company

# TREND 5 – CONNECTED MOBILITY

## Connected Mobility

*is optimising systems and processes.*

### Fleet Management & Vehicle Tracking



*Fleet Management is one of biggest opportunities thanks to policy initiatives by central and local government and demands for improved security in public transport. This space is, however, still evolving.*

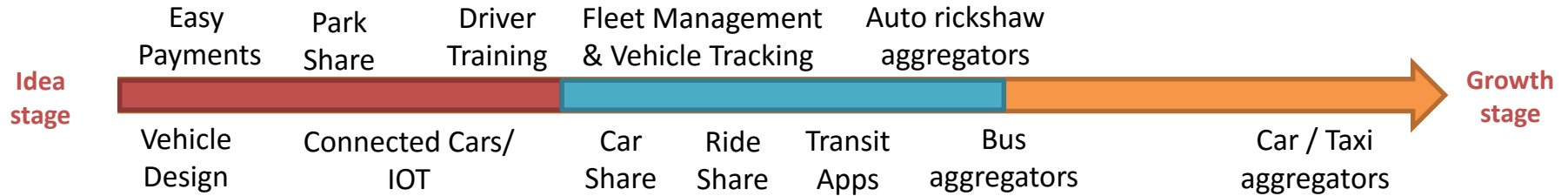
### Connected Cars / IOT



*The government's focus on smart cities and private sector engagement like Mahindra collaborating Vodafone, to create M2M-enabled e2o electric car is changing the landscape of IOT. There are very few startups in this space.*

● Indian company

# HOW ARE THESE TRENDS EVOLVING IN INDIA?



*Indian mobility businesses raised \$365 million in 2014. 60% was raised by taxi aggregators.*

*Only a miniscule number of mobility businesses in other segments have been able to raise funding.*

**Challenges and barriers include**  
Regulation and policy issues  
Lack of open data  
High cost of technology and research  
Access to seed funding