Bikesharing and the City
How can dockless systems contribute to sustainable urban transport?

Introduction to the Breakfast Meeting

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June 27th, 2018
Embassy of the Kingdom of the Netherlands, Berlin
Dockless bikesharing arrived in Germany: Characteristics of dockless bikesharing services in Germany

- Bikes are available within a certain service area without any stations
- Registration via smartphone/rent via QR-code
- Technically simple and robust bikes
- Simple pricing models
- Most operators started with fleets in the three-digit range
- Usually in the central districts of larger cities. First operators started in smaller cities (Bad Vilbel, Dreieich, Langen etc.)
Understanding the development of dockless bikesharing: Rapid growth based on venture capital

Investors pour capital into bike-sharing startups
2013 - 2017

Source: CBinsight
Understanding the development of dockless bikesharing: Rapid growth based on network effects

Diseases

Meituan-Dianping

mobike

ofo

Tencent

DiDi

Alibaba Group

860

950

550

520

Taobao.com

Alipay

TMALL

28.06.2018

Agora Verkehrswende
Recommendations on dockless bikesharing services for German cities and towns

Joint publication with:
- German Cyclist’s Association (ADFC)
- Association of German Cities (DST)
- German Association of Municipalities and Towns (DStGB)

Objective:
- Aggregate experience from German city authorities
- Unfold chances, challenges and concerns
- Identify (short-term) options for meeting existing challenges
- Collect international good practice
- Outlook on legislation

Available at www.agora-verkehrswende.de
Dockless bikesharing and the city: What do local authorities in Germany think about it?

Chances and challenges from the municipal perspective

**Chances**
- Complement to urban mobility choices
- First/last mile solution for intermodal mobility behavior
- Shifting short distance car trips to sustainable transport modes
- Mobility solution for small and medium sized cities

**Challenges/Questions**
- Size of the fleet
- Business models
- Technical quality of the shared bikes
- Communication
- Reliability of the service
- Impact on publicly funded bikesharing services
- Lack in clear regulation
- Fleet management
- Use of public space
Food for thought:
Do we have enough space for dockless shared bikes?

<table>
<thead>
<tr>
<th>Passenger cars registered in 2017 in Berlin</th>
<th>Dockless shared bikes in Berlin</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Car icon]</td>
<td>![Bike icon]</td>
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</tbody>
</table>

Passenger cars registered in 2017 in Berlin
Dockless shared bikes in Berlin
Agora Verkehrswende ist eine gemeinsame Initiative der Stiftung Mercator und der European Climate Foundation.

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Thank you for your attention!