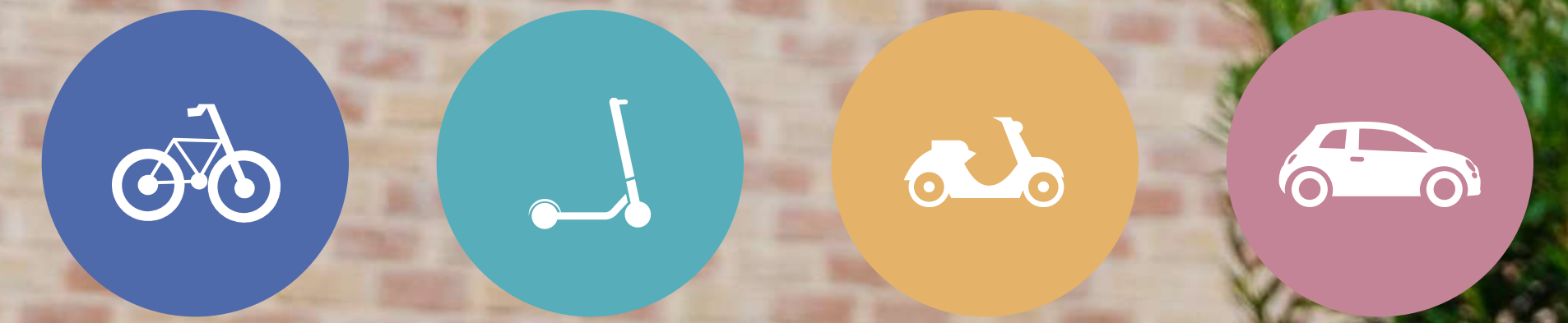


# EUROPEAN SHARED MOBILITY INDEX

— Q1 2023 —





## SUPPORTED BY



Fully owned by BNP Paribas, Arval is a specialist in full-service vehicle leasing and new mobility solutions. Through our connected solutions and tailored services, companies are able to optimise their employees' mobility and outsource the risks associated with fleet management. We also actively support and advise our customers in accelerating the energy transition, empowering them to be more sustainable.

[arval.com](https://arval.com)



**BAFANG**

Bafang is one of the leading manufacturers of e-mobility components and complete e-drive systems, developing customized solutions for a wide range of electric vehicles since 2003. The company operates worldwide and focuses on all global e-mobility trends of the future: whether for individual concepts for e-bikes, e-scooters or public bike-sharing systems. Bafang's comprehensive product portfolio includes motors, sensors, batteries, HMIs, controllers, connectors, and innovative IOT results.

[bafang-e.com](https://bafang-e.com)



**drover**

Drover AI specializes in AI-based IoT solutions for last-mile transportation, elevating the performance of fleets while exceeding the regulatory requirements of cities. Drover's PathPilot delivers features like sidewalk detection and parking compliance even in the absence of GPS or cellular connectivity, allowing for unmatched control of fleet and user behavior in real time. Drover pairs its edge-based tech with its management platform, Corral, to deliver a variety of unique and valuable insights to operators and cities alike.

[drover.ai](https://drover.ai)



**SHARENOW**

SHARE NOW is the market leader and pioneer of free-floating carsharing. The company is operating 11,000 vehicles in 16 European cities. More than three million customers are already using the on-demand service that offers rentals from 3 minutes to 30 days and a variety of car models from brands such as BMW, Mercedes-Benz, MINI, smart and Fiat.

[share-now.com](https://share-now.com)



## Wunder Mobility

Wunder Mobility is the leading software and hardware provider for vehicle sharing. Our highly customizable and deeply integrated software solution is complemented by a sharing-ready vehicle program built in partnership with leading manufacturers. Operators of bike-, scooter-, and car-sharing systems in >200 cities on five continents are relying on Wunder technology to complete millions of trips per month. Wunder Mobility was founded in 2014 by Gunnar Froh and is headquartered in Hamburg, Germany.

[wundermobility.com](https://wundermobility.com)



**POLIS**

CITIES AND REGIONS FOR TRANSPORT INNOVATION

POLIS is the leading network of European local, regional and transport authorities committed to transport innovation. Our focus is on innovations that make urban mobility more sustainable, safe, affordable and equitable. We actively support constructive dialogue with shared mobility operators to shape together solutions that serve the public good and drive the shift that we all need to achieve this decade.

[polisnetwork.eu](https://polisnetwork.eu)



**MOVE**

MODELS • TECHNOLOGY • SUSTAINABILITY

MOVE is a specialised and focused event dedicated to mobility, not an add on to a tech or electronics show. Mobility is changing at an explosive rate - now is the time to attend MOVE and be a part of that change.

This June, MOVE is bringing together 800+ speakers, 150+ exhibitors, 500 startups and 6,000 attendees.

[terrapinn.com/exhibition/move](https://terrapinn.com/exhibition/move)





# NEW BEGINNINGS

*When the going gets tough, the tough get going.*

There's no hiding that it has been a challenging start to 2023. The first quarter is always the lowest regarding trips and revenue, but the problem lies deeper.

Both cities and operators are calling time on some services. Authorities are limiting the number of vehicles in their cities through permits and fleet caps (to have more control over public space). Paris' vote to ban shared scooters from the capital in April is the most extreme example of this. Operators, too, are exiting unprofitable markets where there isn't a financially viable model—take Bird's exit from several European countries, and GO Sharing's withdrawal from nearly 30 Dutch markets, for example.

**Is it the end of the road? Not even close.** We see it more as a 'coming of age story' for the shared mobility market. The teenage years are over, and it's time for adult life to begin.

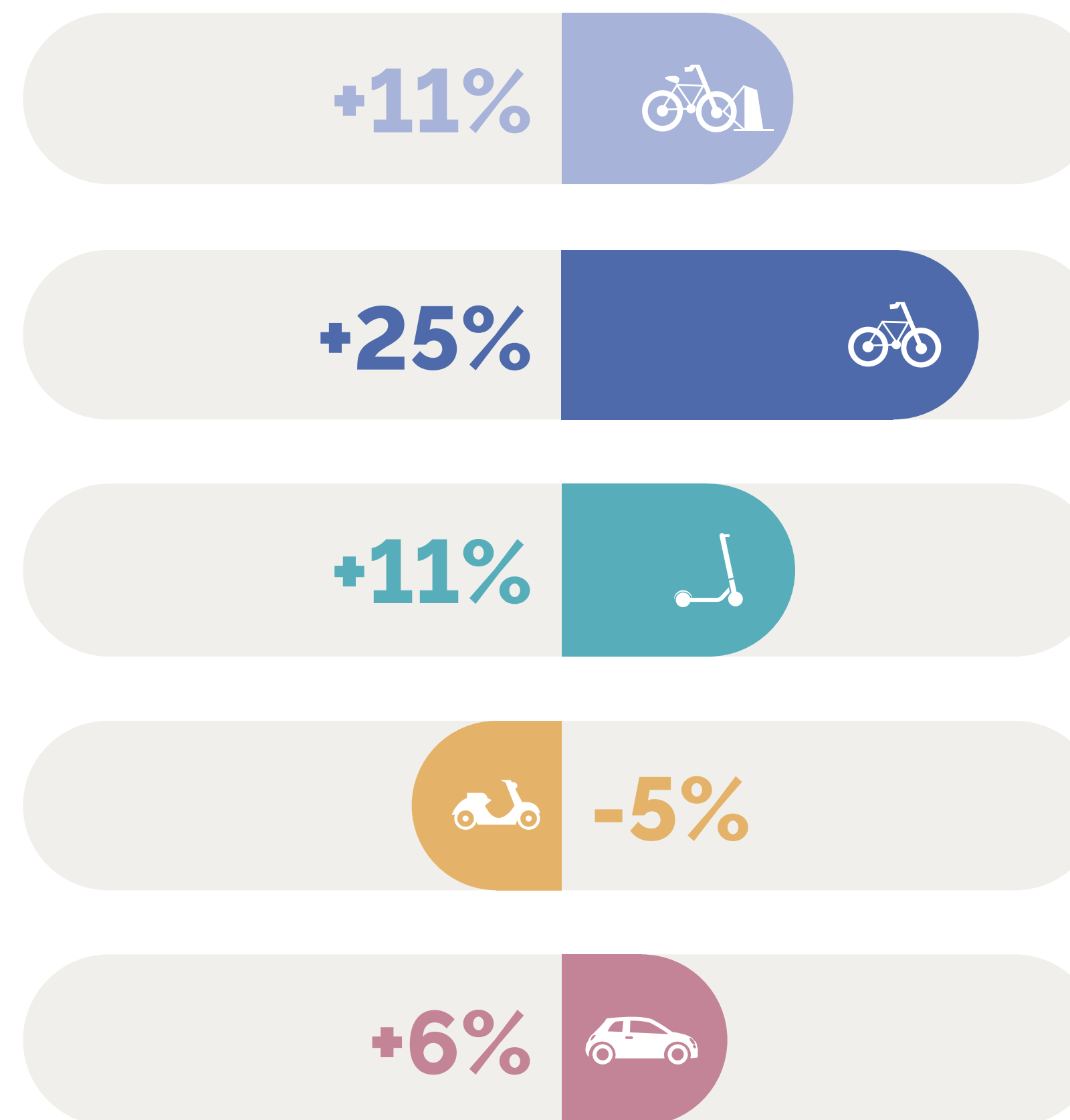
One huge positive is that, despite the removal of vehicles in some cities, ridership is still going up—and trips per vehicle per day are rising. There is significant demand for these services, and each individual vehicle is being used more frequently.

**Lessons have been learned, and we are wiser for it. But these new beginnings will have new objectives, and they will have to be achieved with fewer resources.**

*N.B We've changed the term 'free-floating' bikes (used in previous editions) to 'dockless' bikes. This is simply to reflect the pattern we are seeing around parking (virtual stations preferred to pure free-floating).*

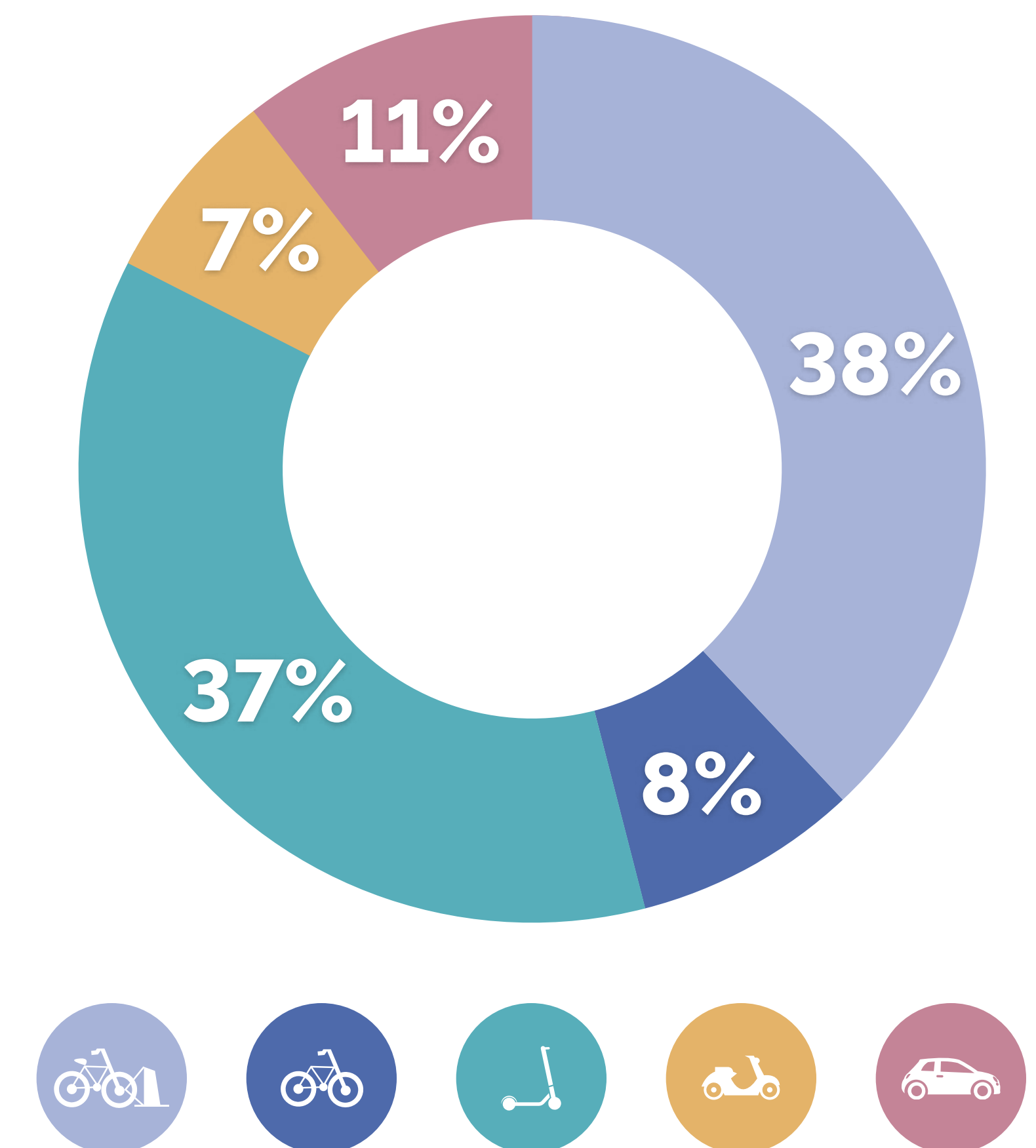
## RIDERSHIP GROWTH

Q1 2023 vs Q1 2022



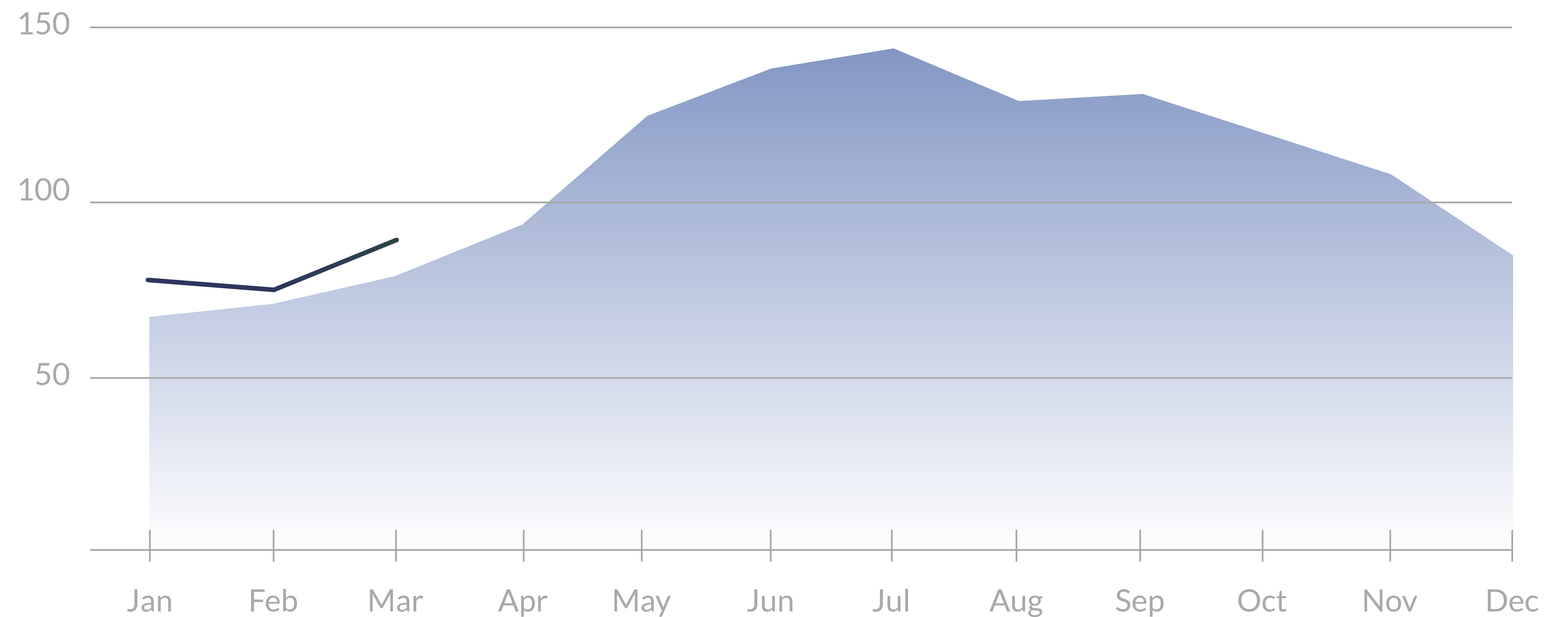
## MODAL SHARE

Total ridership per mode | Q1 2023



## YEAR-ON-YEAR RIDERSHIP

Base 100: AVG 2022





# OUR 2023 PREDICTIONS

1

The largest cities in Western Europe have largely reached maximum capacity for scooters. The scooters that are no longer welcome in Paris (or other cities where fleet sizes have been trimmed) won't just disappear, but they will be redistributed to larger cities in Eastern Europe—where there are markets that show a lot of growth potential—and to mid-size cities across the continent.

2

The size difference between fleets of scooters and bikes will begin to shrink over the course of 2023. Currently there are 400,000 scooters and 255,000 bikes in Europe, but we estimate the number of dockless bikes will grow between 30 and 40% from peak 2022 levels.

3

We will see a slight reduction in the number of active vehicles in Q1 2024. Over 2023, we will see vehicle numbers rise as we get into summer, then reduce as winter comes along—but more fleet caps will be implemented, limiting fleet growth. However, vehicles will be more efficient, and record more trips per vehicle per day.



## The Fleet & Mobility Barometer 2023 indicates five key macro trends for the foreseeable future:



Company fleet size to continue to grow or remain stable: 91% of all companies surveyed across the 30 countries expect their fleet to remain stable or grow over the next three years

Full service leasing to continue to grow, in all types of businesses: with 35% of companies considering introducing or further increasing the use of this financial method.

Electrified vehicle adoption is clearly accelerating, with 50% of companies already using at least one alternative fuel technology (HEV, PHEV and BEV)

Mobility solutions are increasingly being implemented as an add on to company cars: 71% of companies have already implemented at least one mobility scheme for their employees (corporate car sharing, bike leasing or a mobility budget are a few of them). 88% have already implemented or intend to invest in such mobility schemes over the next 3 years.

Real acceleration in the implementation of connectivity with an increase of 10 points compared to last year.

Do you want to learn more?  
[Visit our website and download the full document](#)

The Arval Mobility Observatory, an industry expert in the recording and forecasting of corporate mobility trends, has published the results of its latest Fleet and Mobility Barometer, an international survey, unique in terms of scope but also in terms of topics discussed. In 2023, 622 company decision makers were interviewed to gather feedback from 30 countries covering Europe, Americas, Turkey and Morocco.



# URBAN DENSITY & SHARED MOBILITY

## Population density & public transport viability

The widely-held belief is that population density plays a crucial role in determining the economic viability of public transport services. Essentially, population density is a key factor in the success of mass transit, putting the 'mass' into mass transport.

The density of urban areas is crucial in shaping residents' mobility choices. In densely populated cities, there is a notable shift away from private car usage towards alternative modes of transportation. The proximity of amenities, services, and workplaces in high-density areas reduces the need for long-distance travel, making walking and cycling attractive for short trips. These areas encourage active travel, contributing to improved health, reduced traffic congestion, and lower carbon emissions.

## Population density & shared mobility

The same relationship between population density and public transport viability can be seen with shared mobility: services that provide a flexible and cost-effective alternative to private car usage in high-density areas. Access to practical and affordable services encourage residents to choose these shared modes, contributing to a reduction in traffic congestion and positive environmental impact.






## Untapped potential

Data collected by Fluctuo in over 90 European cities shows that all cities with an urban density of over 5,000 inhabitants per km<sup>2</sup> have over 10,000 shared vehicles (bikes, scooters, and mopeds), except for Copenhagen (8,600 vehicles). This is hardly surprising given that these densely populated cities are also some of the largest cities in Europe. Outside of our original 90 cities, we found a further 6 cities with very dense urban populations with fewer than 10,000 shared vehicles.

Fluctuo suggests that these cities may not have hit their full potential for shared mobility and might well be hotspots for growth in the coming years.

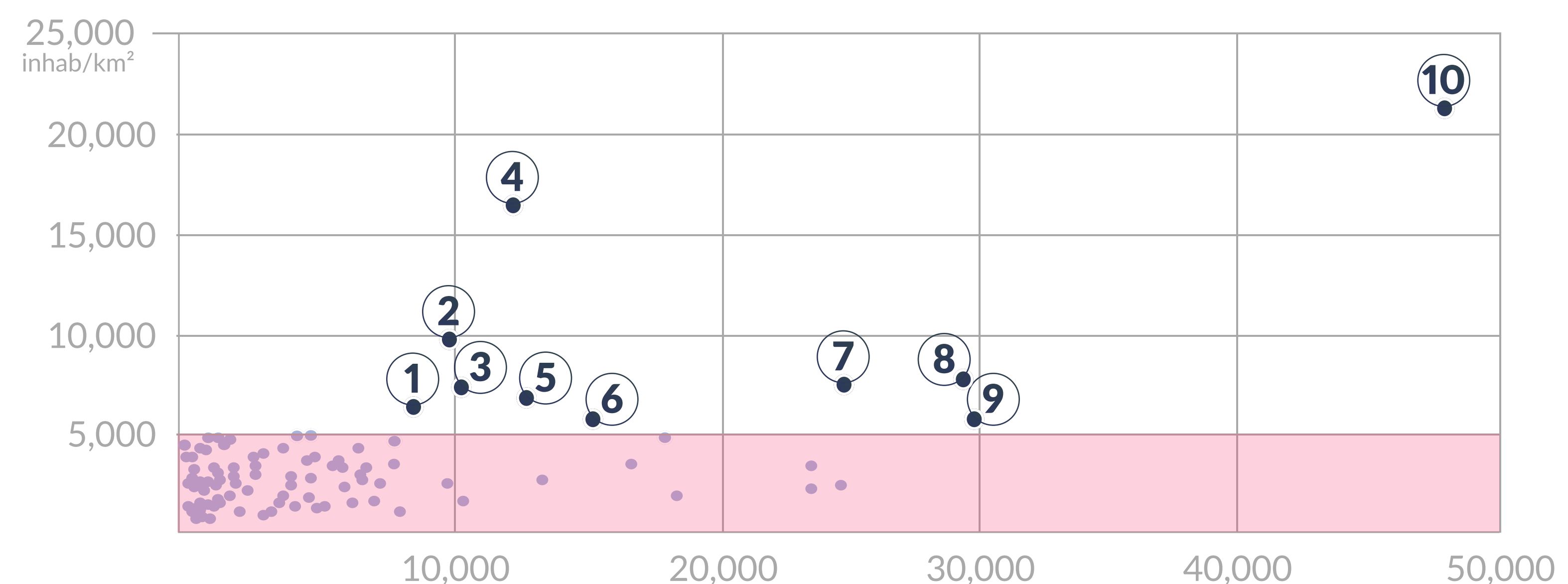
## UNTAPPED POTENTIAL

Cities with a density above 5,000 inh./km<sup>2</sup> and fewer than 10,000 shared vehicles

CITIES	SHARED VEHICLES	POPULATION DENSITY
 <b>ATHENS</b>	<b>&gt;1,000</b>	<b>17,475/km<sup>2</sup></b>
 <b>LYON</b>	<b>8,500</b>	<b>10,909/km<sup>2</sup></b>
 <b>NAPLES</b>	<b>2,000</b>	<b>7,752/km<sup>2</sup></b>
 <b>VALENCIA</b>	<b>4,000</b>	<b>5,865/km<sup>2</sup></b>
 <b>PORTO</b>	<b>&gt;1,000</b>	<b>5,596/km<sup>2</sup></b>

## URBAN DENSITY & SHARED VEHICLES

Population density (inhabitants/km<sup>2</sup>) against the number of shared bikes, scooters & mopeds



- 1 - Copenhagen
- 2 - Bucharest
- 3 - Turin
- 4 - Barcelona
- 5 - Lisbon
- 6 - Madrid
- 7 - Milan
- 8 - Brussels
- 9 - London
- 10 - Paris



### Daily usage is greater in denser areas

The positive correlation between urban population and fleet sizes only tells half the story. Success of shared modes is more accurately demonstrated by the number of trips per vehicle per day (TVD). A large fleet of bikes or scooters in a city suggests that a particular mode is popular, but the TVD tells us whether or not that mode is flourishing.

A closer look at TVD in 32 European cities (all of which were part of the original 90 cities) finds that a higher population density leads to more shared mobility usage. Front-runners include Paris and Barcelona (Europe's densest cities, which also have the highest utilisation rate).

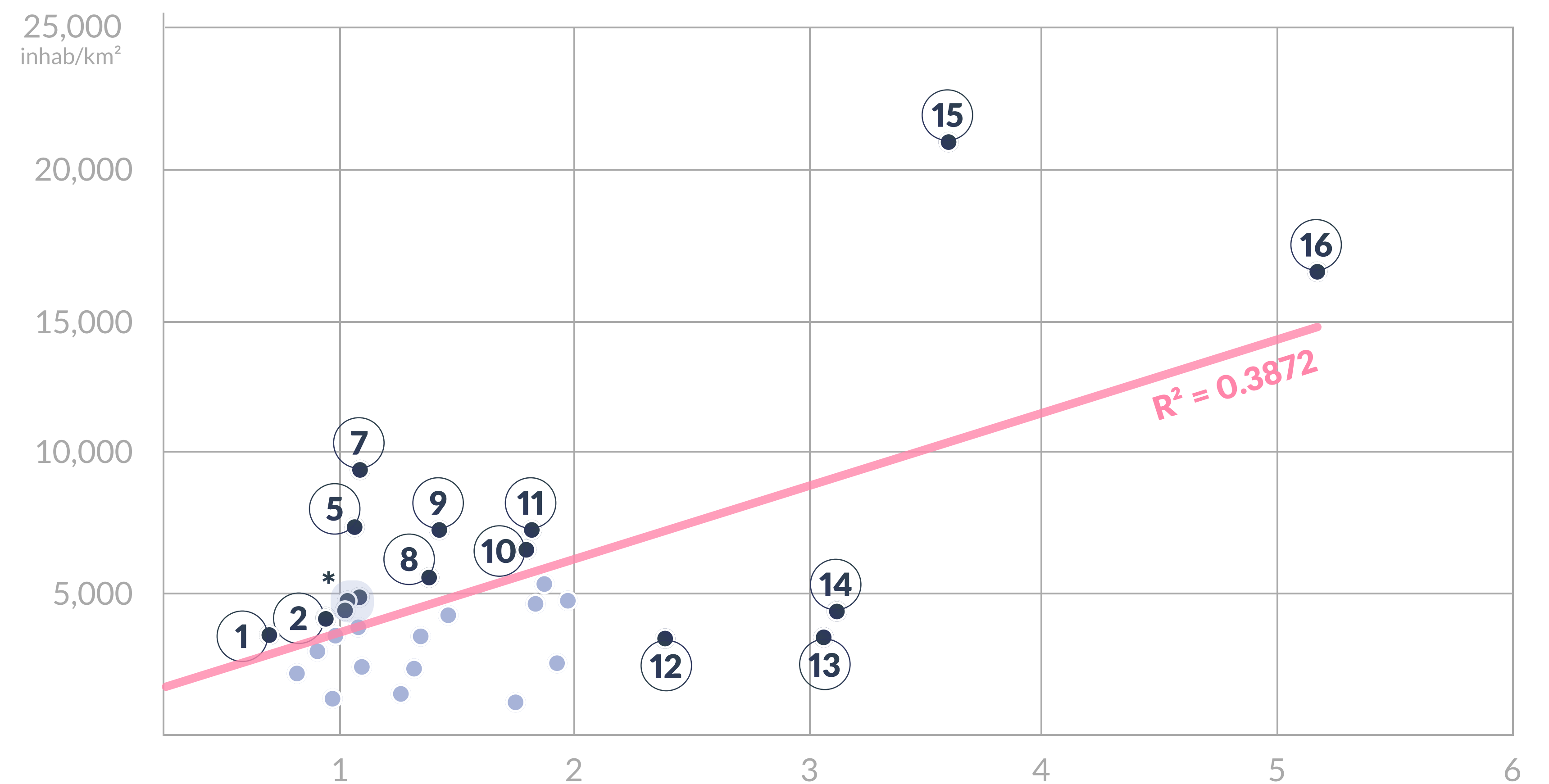
### Encouraging shared mobility use

The data supports the theory that population density and mobility choices are strongly linked. Embracing the connection between them can lead to healthier, more livable cities, reduced reliance on private vehicles and an improved quality of life for urban residents. Promoting high density developments/housing, as well as prioritising pedestrian and cycling infrastructure, are some of the ways we can get there.



## URBAN DENSITY & TRIPS PER VEHICLES PER DAY

Population density (inhabitants/km<sup>2</sup>) against TVD (bikes, scooters & mopeds)



- 1 - Warsaw
- 2 - Berlin
- 5 - Brussels
- 7 - Bucharest
- 8 - London
- 9 - Milan
- 10 - Lisbon
- 11 - Turin
- 12 - Seville
- 13 - Marseille
- 14 - Dublin
- 15 - Paris
- 16 - Barcelona

\* This cities cluster contains from left to right:

- 3 - Vienna
- 4 - Stockholm
- 6 - Munich





# FOCUS ON BIKES

RIDERSHIP GROWTH  
Q1 2023 vs Q1 2022

**+15%**

BIKES IN EUROPE  
**255,000**

During the first quarter of 2023, bike schemes continued to trend upwards, solidifying their position as the leading choice for urban commuters. Here are three key observations that shape the landscape of bike sharing:

### Unparalleled growth in bike sharing

Bike sharing maintains its status as the fastest-growing mode of shared transport since the 1st of January, surpassing scooters, mopeds, and cars. The sustained growth in this sector signals a significant shift in the way people perceive and utilise urban mobility options while bike infrastructure continues to be improved.

### Dockless bikes lead the way

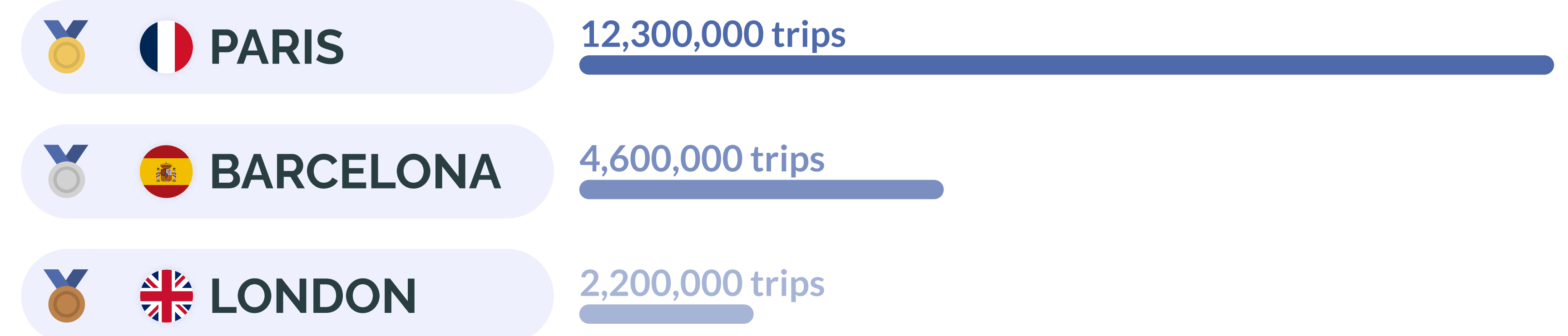
Dockless bikes have emerged as the standout performers in bike sharing, with a growth of 33% during the first quarter of 2023. The exponential growth of dockless bikes reflects the increasing demand for flexible transportation solutions that adapt to users' needs.

### Weather sensitivity and market position

While dockless bikes have demonstrated steady growth, they are still more sensitive to adverse weather (rain or extreme cold)—impacting ridership and usage patterns of dockless bikes. However, there are 35,000 more of them compared to one year ago, and overall fleet sizes are fluctuating less than before. This resilience suggests that scooter operators' fleet diversification bets have paid off—users are recognising the benefits of these free-floating bikes and are adapting their commuting habits. Mitigating weather-related challenges will become a key focus to ensure a consistent and reliable bike-sharing experience.

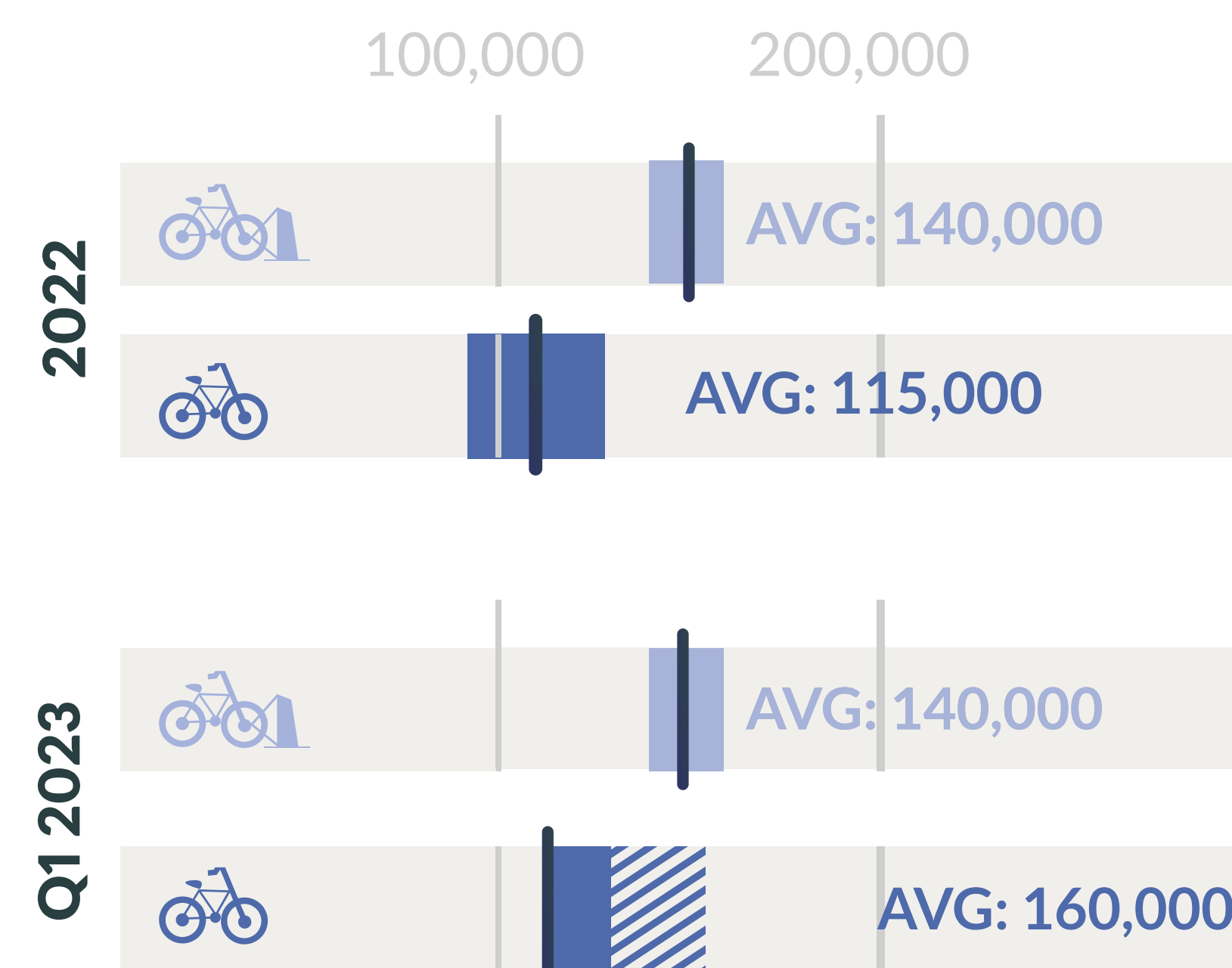
### TOP 3 - RIDERSHIP

Total ridership January-March 2023



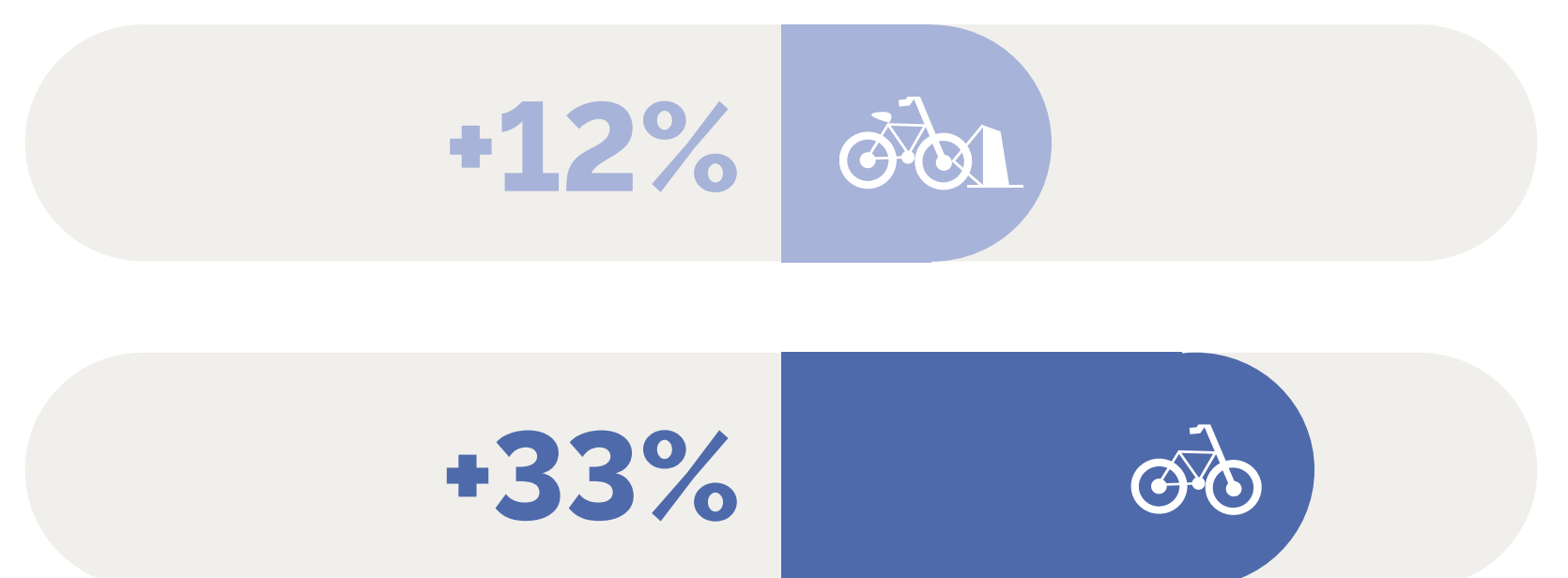
### FLEET SIZE & SEASONALITY FLUCTUATIONS

AVG 2022 vs Q1 2023



### YEAR OVER YEAR GROWTH

Q1 2023 vs Q1 2022







# FOCUS ON SCOOTERS

RIDERSHIP GROWTH  
Q1 2023 vs Q1 2022

**+11%**

SCOOTERS IN EUROPE  
**400,000**

Tenders have become the norm to regulate the use of shared scooters across Europe. There are good ones, and there are bad ones. What makes a good tender?

### Why tender?

Public tenders create a level playing field for operators. They set clear criteria and requirements for participation, ensure a transparent and fair selection process, and establish specific quality standards and operational guidelines (e.g. maintenance, safety, parking policy, data sharing, customer service, and environmental sustainability, operational zones). By setting these standards, cities can make shared mobility services safer, more reliable, and more popular.

### The power of tenders

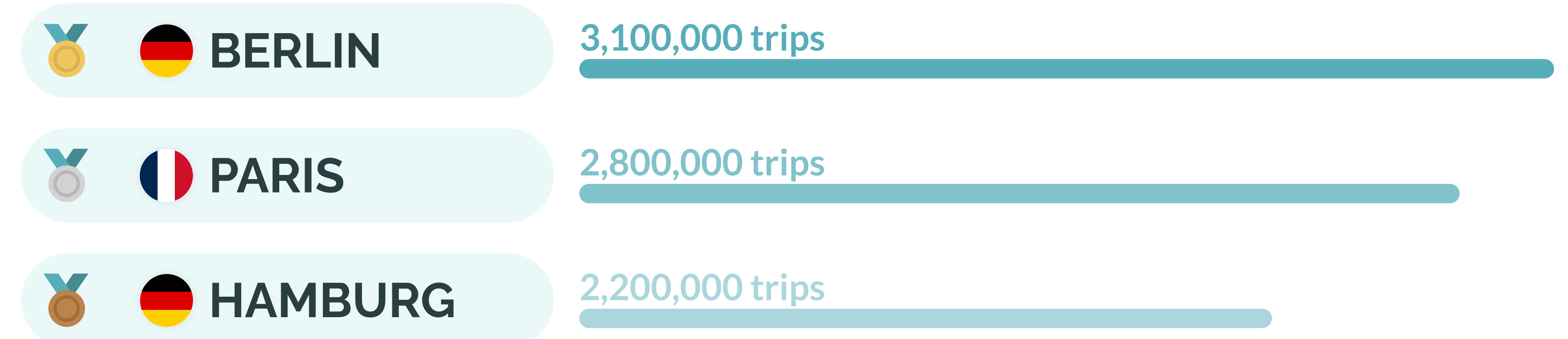
The most crucial part of a tender is the ability to restrict the number of vehicles and operators. A good tender sets ideal conditions for operators, so that they can be profitable, and offer service stability and quality.

### Shining examples

Scooter ridership in Bordeaux has increased since the public tender cut 11 operators (bikes, scooters, mopeds) to just 2 for each mode. The winter months (generally unfavourable to scooters) have outperformed all summer months in 2022 and in April 2023: ridership was twice as high as it was a year ago. In Oslo, the tender gave licences to 3 operators (meaning 5 services had to close) and set the maximum total fleet size to 8,000. Each vehicle was used more (see graphic), increasing operator profitability and reducing the occupation of public space.

### TOP 3 - RIDERSHIP

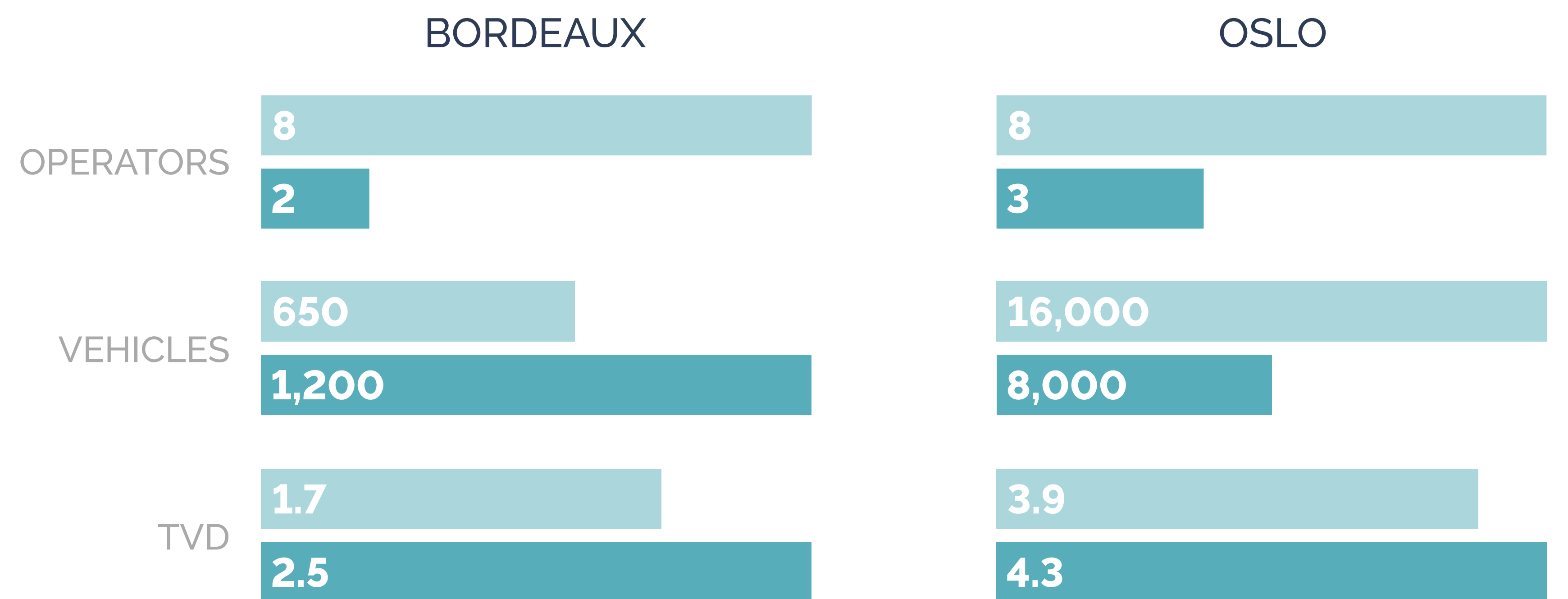
Total ridership January-March 2023



### PRE & POST-TENDER

Analysis of scooters in Bordeaux & Oslo

Pre-tender Post-tender







# FOCUS ON MOPEDS

For the first time ever, Fluctuo records a fall in ridership for a specific mode.

RIDERSHIP GROWTH  
Q1 2023 vs Q1 2022

**-5%**

MOPEDS IN EUROPE

**28,000**

### Stagnation explained

Our last analysis of 100 cities showed that mopeds appeared in just 37 cities (compared to station-based bikes (74), dockless bikes (57), scooters (87) and cars (62)). As the least present mode, each individual market's performance has a higher overall impact on the global ridership. This quarter saw Reby-affiliated services in Barcelona (avant, iberscot, oiz) exit, meaning that ridership in Barcelona didn't increase as expected. GO Sharing's exit from many Dutch markets (before the acquisition by BinBin) and Acciona's withdrawal from Milan and Rome almost certainly played a part too.

### Time to panic?

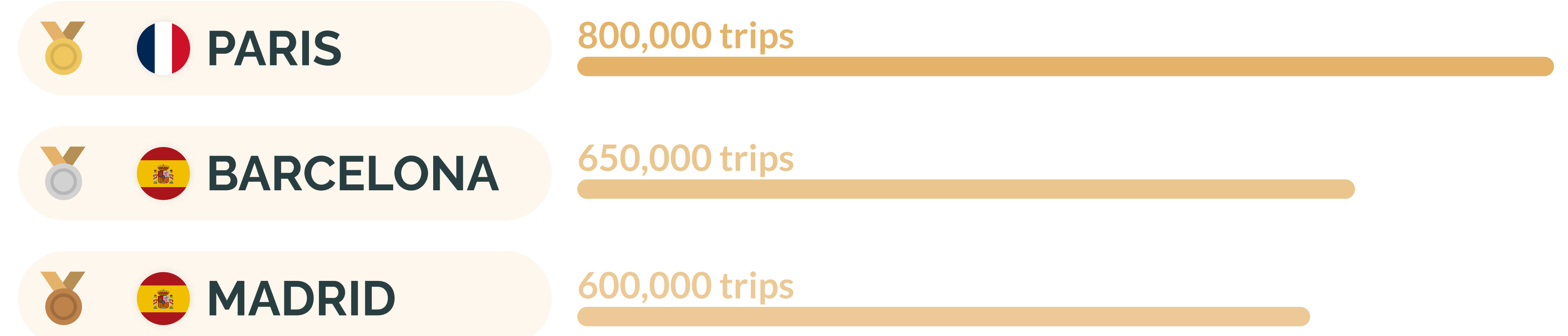
Not just yet. Q1 is usually all modes' weakest quarter. Ridership in these months are at their lowest and only after an analysis of Q2 and Q3 can we jump to conclusions. Cooltra have just raised €25m, Troopy €10m and Cabify (who also have other interests) raised €100m.

### Future of mopeds

Growth is steady in France, Spain, Italy and the Netherlands. However, TIER cutting mopeds from Berlin in November 2022, coupled with Felyx's decision to sell its German operations to emmy sharing, demonstrates how challenging operating mopeds can be. Even with TIER's resources and vast experience—and Felyx's success in several key markets in the Netherlands—it seems to be the hardest mode to make a profit with. Fluctuo previously reported that scooters may have hit a glass ceiling; perhaps this is now true of mopeds?

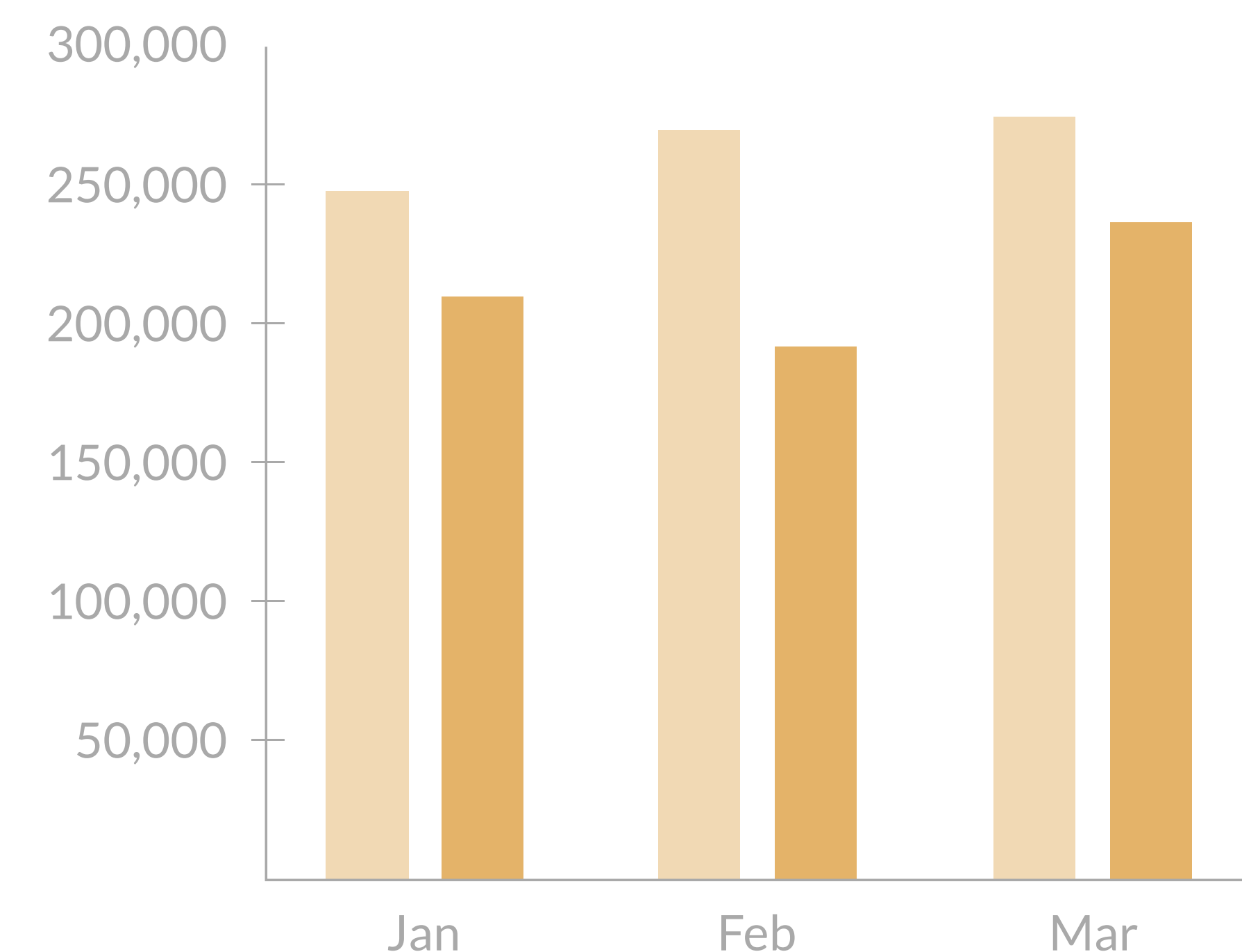
### TOP 3 - RIDERSHIP

Total ridership January-March 2023



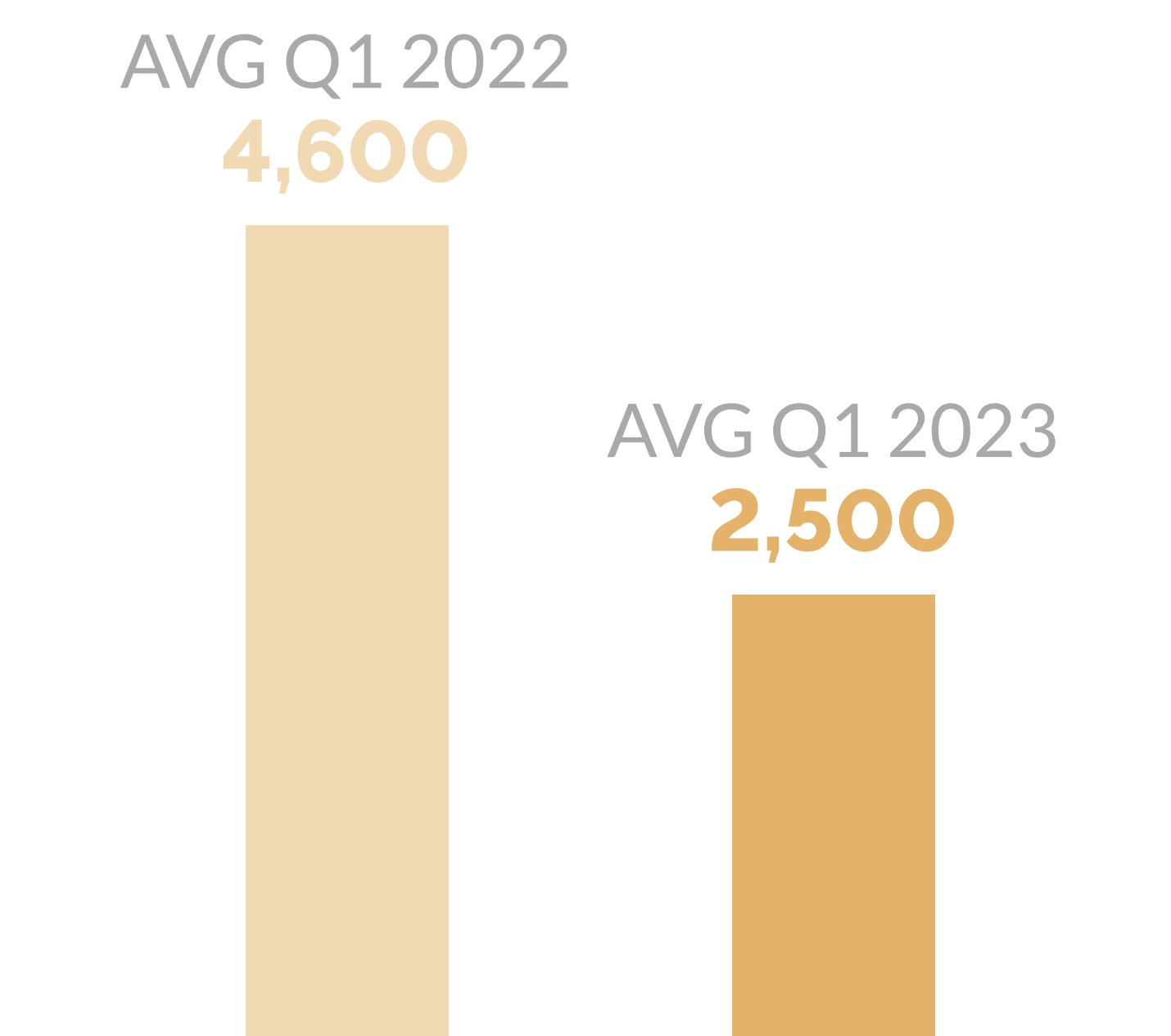
### TRIPS IN BARCELONA

2022-2023



### VEHICLES IN BARCELONA

2022-2023







# FOCUS ON CARS



*In partnership with Augustin Friedel*

## RIDERSHIP GROWTH

Q1 2023 vs Q1 2022

# +6%

## CARS IN EUROPE

# 67,500

Car sharing has evolved significantly in recent years. The market has transitioned from being dominated by original equipment manufacturers (OEMs) to a more diverse landscape with independent players. Here are the key trends in the European car sharing industry:

### Electrification of fleets

Existing networks aim to shift to EVs quickly, but limited charging infrastructure hampers operators. Moreover, the industry faces supply constraints, making it difficult to obtain EVs suitable for sharing. Over the past 18 to 24 months, acquiring suitable EVs for car sharing has been nearly impossible.

### Rise of car sharing in unexpected markets

While car sharing fleets in Western European cities remain stable, some markets have experienced a decline. Surprisingly, growth is observed in regions that were previously overlooked. Poland stands out as one of the fastest-growing car sharing markets, with Belgium also witnessing a ramp-up. Local players like Poppy are expanding their presence in multiple directions, while newcomers like MILES are making their mark.

### Time for experiments

Car sharing operators are pushing the boundaries of traditional models, venturing into new territories and experimenting with diverse approaches. This includes targeting smaller cities and exploring station-based car sharing. ShareNow is piloting station-based sharing in Münster, a city with around 315,000 citizens.

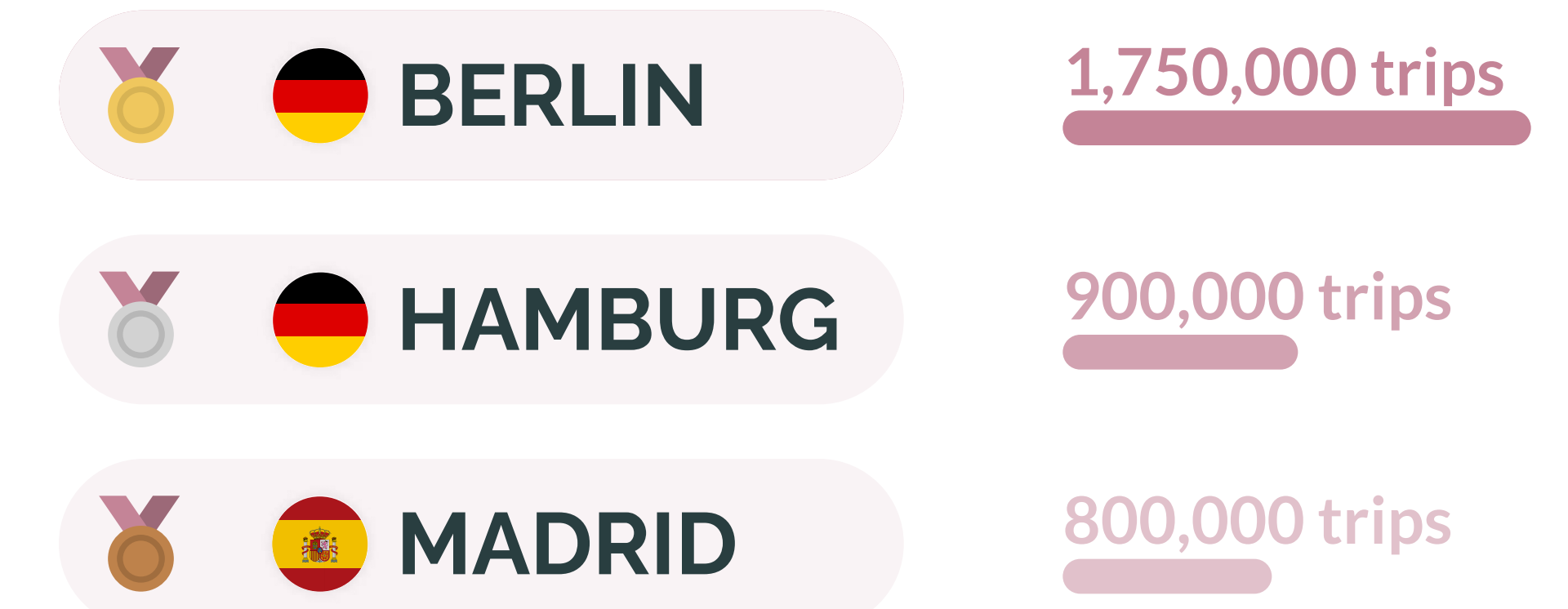
### New pricing schemes and efficiency focus

In addition to geographical and operational experimentation, operators are introducing innovative pricing schemes to attract customers. They are also focusing on improving efficiency to reduce costs. Damage detection is one area where operators are increasing their efforts, utilizing technology to detect damages immediately and charging users accordingly. Cross-business models are emerging, where cars are dynamically distributed between sharing, rental, and subscription services to maximize utilization.

Overcoming challenges related to charging infrastructure and supply constraints is crucial for successful EV integration. As car sharing continues to evolve, operators must adapt to changing consumer preferences and strive for sustainability while maximizing utilization and cost-effectiveness.

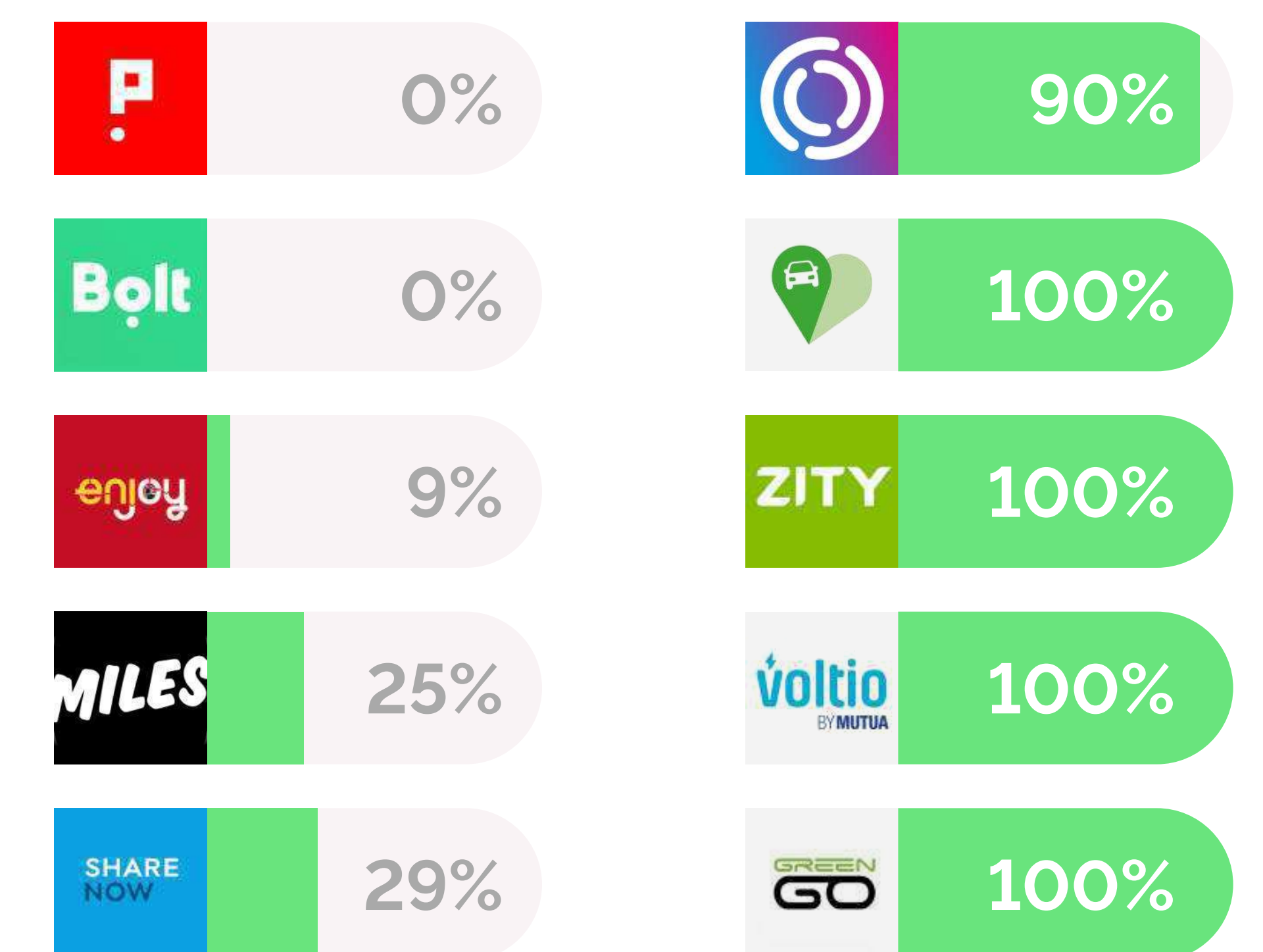
### TOP 3 - RIDERSHIP

Total ridership January-March 2023



### ELECTRICIFICATION OF CAR-SHARING

Percentage of electric cars in sharing fleet





# REVOLUTIONIZING SHARED MOBILITY

## BAFANG'S AUTO-SHIFT SHAFT DRIVE SYSTEM

Bafang is innovating for the shared mobility sector, with a system designed to deliver both enhanced rider experience and lower maintenance requirements for fleet operators.

In today's developing shared mobility industry, Bafang—as a global supplier of complete drive systems—hopes to bring some driving force to the industry through its own product technology. Combining an understanding of the shared mobility market and its own technical and product resources, Bafang has proposed a self-developed system technology called the 'auto-shift shaft drive system', which utilizes an auto dual-speed hub motor, shaft drive system and a torque sensor at the bottom bracket.

Bafang has integrated the gearbox into the hub motor which will automatically adjust the gearbox ratio dependent on the centrifugal force produced by the wheel speed. The clutch will change the gear mechanically and the rider will get a better cadence without any manual gear-shifting action, resulting in a smarter, smoother and safer riding experience. Meanwhile, the patented torque-sensing technology improves the system's interpretation of the user's intentions, ensuring the appropriate level of assistance is achieved.

It is rare to see multi-speed bikes in the shared mobility market, though many users would welcome the additional functionality and flexibility. The reason typically lies with the high maintenance costs associated with traditional multi-speed bikes. However, Bafang's high-integration dual-speed motor can help reduce the maintenance and installation costs required to achieve this by eliminating the need for front and rear derailleurs, gear levers and cables, and so on.

Shared mobility brings convenience, but also means a higher frequency of use for the product, which can present challenges. Therefore, instead of the traditional combination of chain and sprocket, Bafang's shaft drive system utilizes a main transmission shaft that closely matches the front and rear conical gears to transmit power. This directly eliminates the risk of the chain falling off and improves the efficiency of the mechanical transmission so that "arriving faster" is more than just empty words. At the same time, the entire transmission system is in an enclosed working environment, which avoids the entry of external dirt and debris and works to effectively reduce maintenance costs. From the perspective of a bike's design, the high integration of Bafang's 'auto-shift shaft drive system' offers greater opportunities for simplicity and differentiation.

The development of the industry should be based on user needs, but bike manufacturers and bicycle-sharing companies also need to consider product reliability and commercial value. True technological innovation has the ability to meet multiple requirements within an industry, and this is what we see in the combination of Bafang's automatic dual-speed hub motor and shaft drive system. On one hand, Bafang's 'auto-shift shaft drive system' enhances the travel experience for users, and on the other, it improves service efficiency, propelling the industry to a higher level.





# CAPITAL INTELLIGENCE

## FUNDRAISING



## cabify

Cabify raises a total of **€140m**:

- €40m in December 2022

- €100m in March 2023

## MERGERS & ACQUISITIONS



Free2Move acquires Share Now.  
July 2022



Zeus acquires Zwings.  
August 2022



Helbiz acquires Wheels.  
November 2022



MILES Mobility acquires WeShare.  
November 2022



Bird Global merges with Bird Canada.  
December 2022



Emmy acquires Felyx's German ops.  
February 2023



BinBin acquires GO Sharing.  
February 2023



Zeus acquires Zipp.  
April 2023

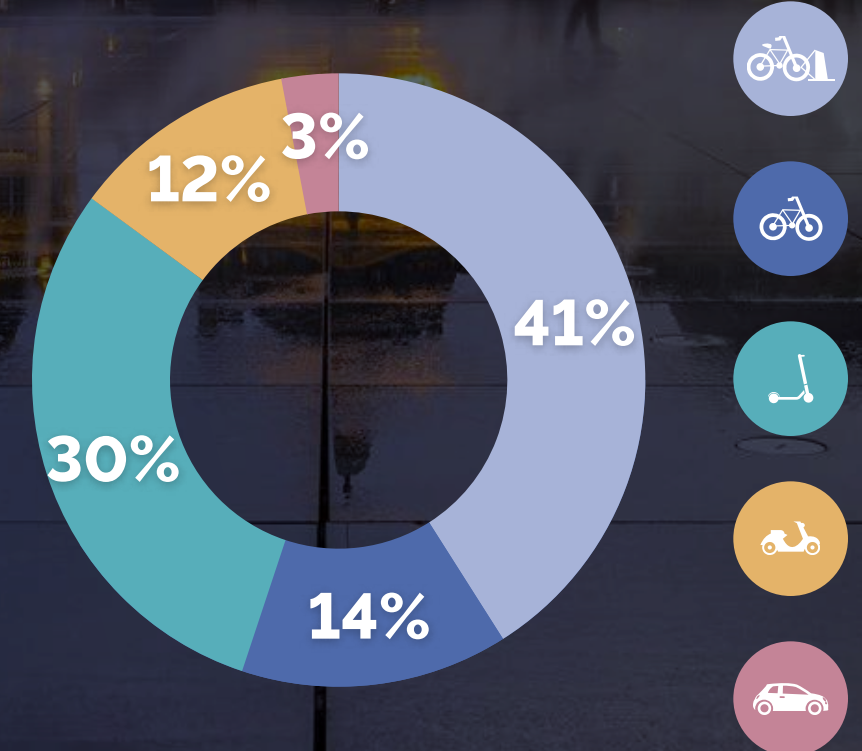


## BORDEAUX FRANCE

POPULATION DENSITY  
**5,264/km<sup>2</sup>**

URBAN POPULATION  
**260,000**

FLEET BREAKDOWN  
Q1 2023



Bordeaux is a hotspot for shared mobility thanks to its kind topography and dense network of cycle lanes. So when free-floating systems appeared, the 13-year-old V3 public bike service was soon joined by a heap of operators. Despite strict fleet caps (100 bikes or scooters per operator) that made operating a challenge, 12 companies offering bikes, scooters or mopeds settled in the city.

In 2022, 24 of the 28 municipalities of the metropole united behind a shared mobility plan with new regulations: the introduction of mandatory parking zones and public space occupation fees, and a tender. 6 operators (2 for scooters, 2 for bikes and 2 for mopeds) have been selected out of 20 applications, and they are now offering larger services.

Riders seem to have benefited from the reduced number of services that each provide more vehicles; ridership in Q1 2023 has grown by around 40% compared to Q1 2022. Significantly, the number of trips per vehicle per day have risen—much to the delight of operators and the city.

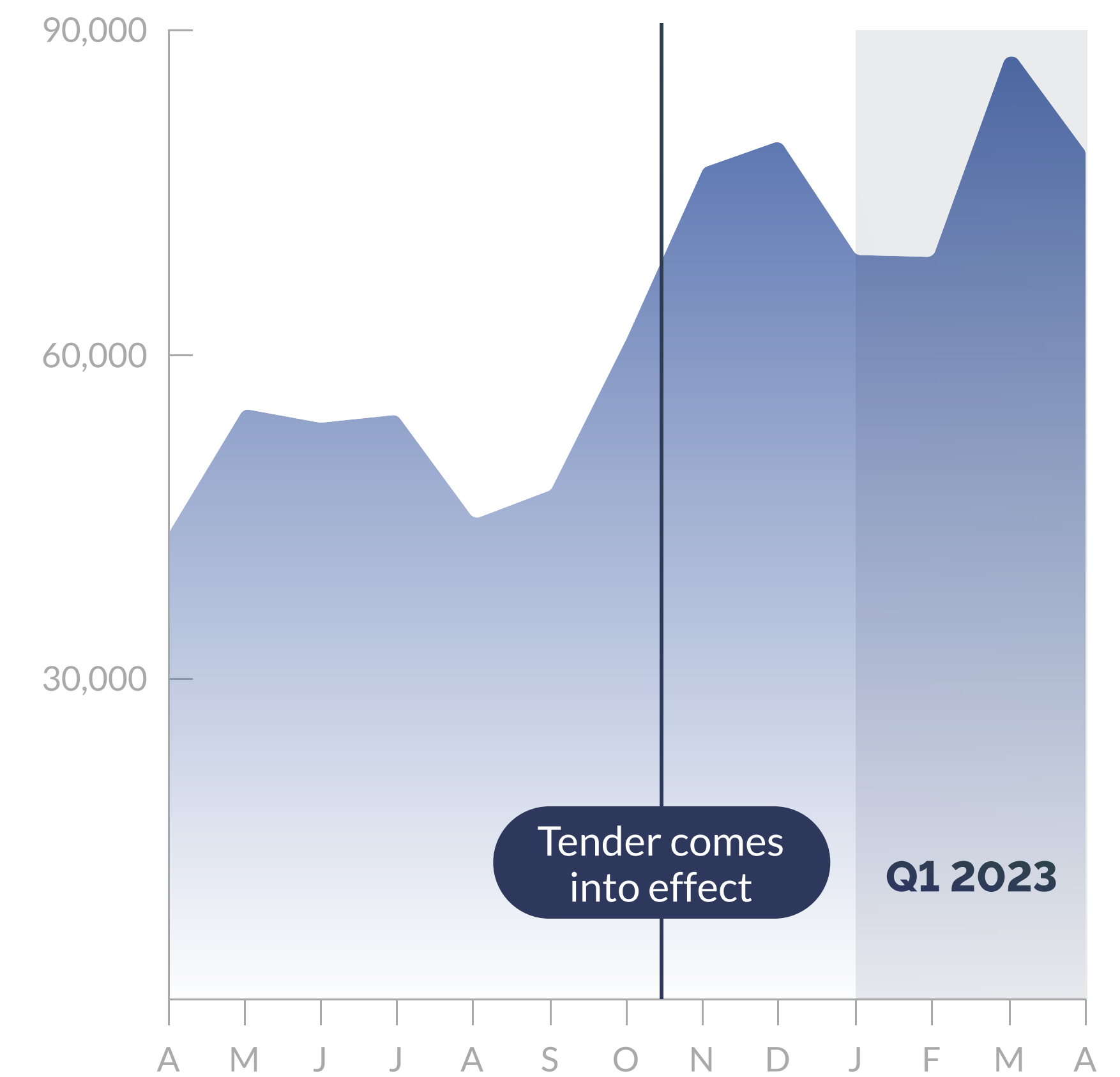
### TVD - Scooters & Mopeds

Trips per vehicle per day

	Q1 2022	<b>1.6</b>
	Q1 2023	<b>2.3</b>
	Q1 2022	<b>2.4</b>
	Q1 2023	<b>3.5</b>

### SCOOTER RIDERSHIP

April 2022-April 2023

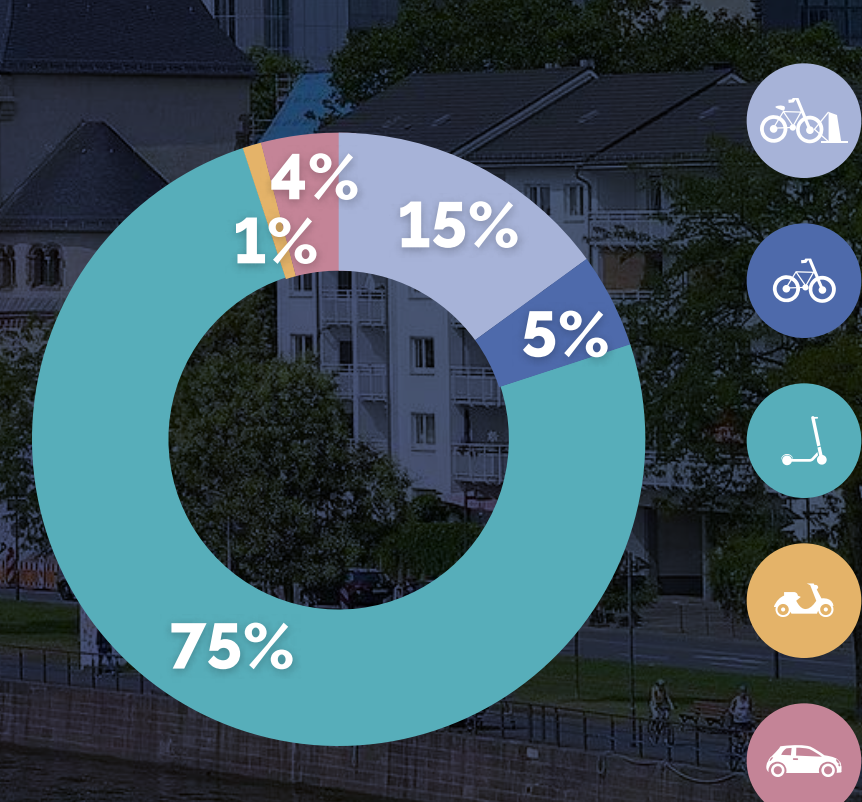


## FRANKFURT GERMANY

POPULATION DENSITY  
**3,185/km<sup>2</sup>**

URBAN POPULATION  
**791,000**

FLEET BREAKDOWN  
Q1 2023



With Frankfurt airport being one of the world's busiest airports, it's no surprise that the city is a global hub for transportation. As is the case with all major German cities, there is a high demand for car sharing services; the number of trips per vehicle per day for cars is higher than any other mode.\*

In October 2022, the German government approved a €6.3 billion plan to increase the number of EV charging stations over the next three years. By April 2023, the number of charging stations had risen by 35%, well ahead of schedule to achieve the target.

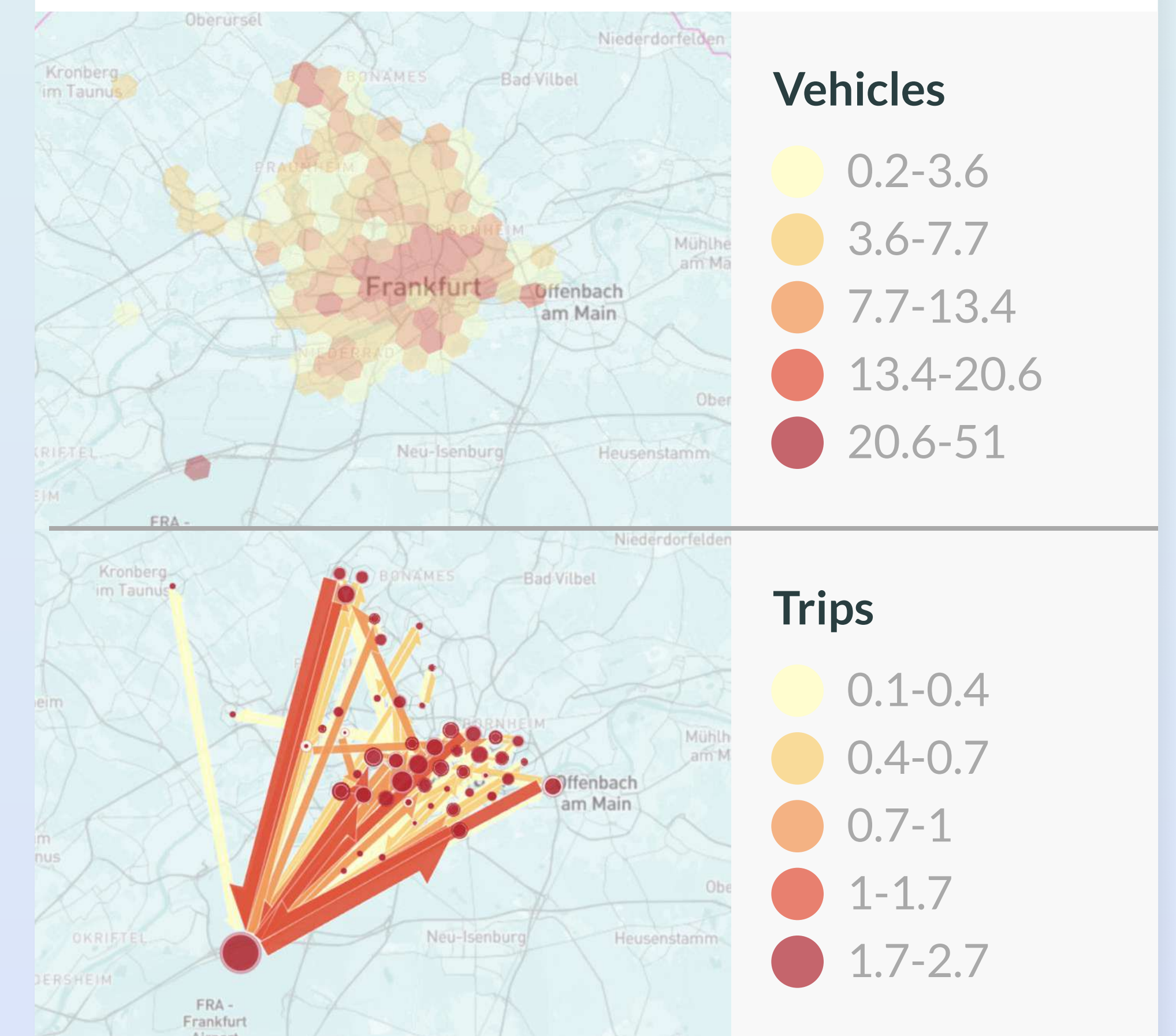
\*Car sharing is the least resistant to seasonality; it being the first quarter, the usage of other shared mobility vehicles (bikes, scooters, and mopeds) would understandably be lower in the winter months.

At the end of Q1 2023, almost 4.5 million people in Germany registered with a car-sharing company—a 30% increase from the previous year—a figure which will only grow as the deployment of more charging stations makes electric car sharing more convenient, and the popularity of car-sharing continues to grow.

In September 2022, EVs from deer and UFODRIVE joined the fleets of shared cars at Frankfurt Airport. Heatmaps from City Dive show that: the densest area for shared cars is at Frankfurt Airport, and the highest number of trips have the airport as either a destination or starting point. It is clear that the shared electric cars are being put to good use, and that car sharing is crucial for making trips beyond the city limits.

### VEHICLE DEMAND HEATMAPS

January-March 2023





## EINDHOVEN NETHERLANDS

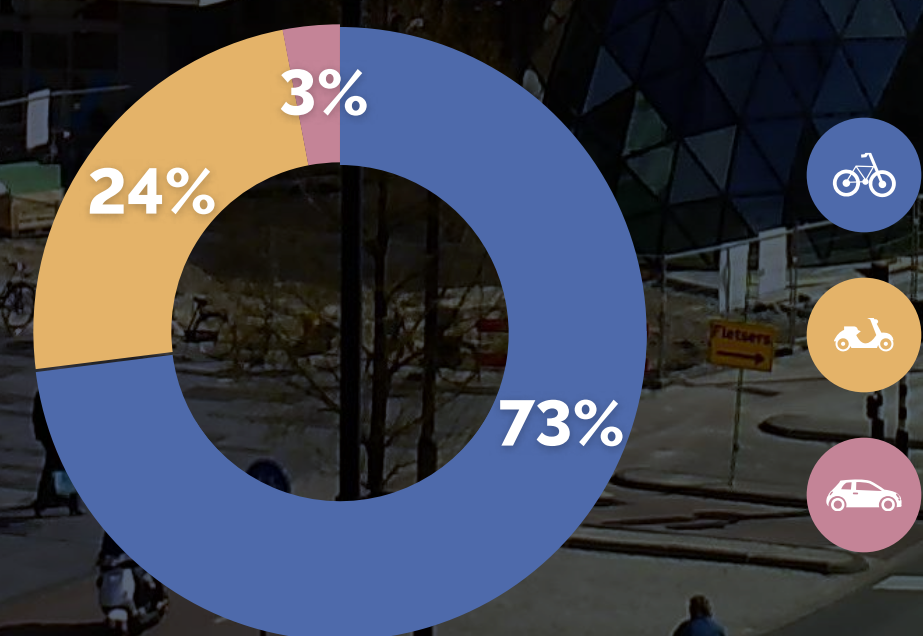
POPULATION DENSITY

**2,684**/km<sup>2</sup>

URBAN POPULATION

**238,000**

FLEET BREAKDOWN  
Q1 2023



Eindhoven offers an extensive range of bike services: from electric bikes to cargo bikes, to the nationwide train-station-based OV-fiets. Despite the lack of scooters (banned in the Netherlands), 1,500 bikes must compete with another popular mode in local transport culture: mopeds.

Around 500 vehicles from local moped operators Felyx and GO Sharing are available in Eindhoven. But Q1 2023 has seen a 32% drop in ridership compared to Q4 2022, perhaps due to the introduction of mandatory helmets for snorfiets (mopeds with a 25 km/h speed limit). Summer looks brighter with more vehicles on Eindhoven's streets: after some financial difficulties, GO Sharing is back after its acquisition by the Turkish company BinBin.

The importance of local operators is confirmed in the car sharing landscape through leading Dutch operators such as Greenwheels and MyWheels, though still with relatively small fleets.

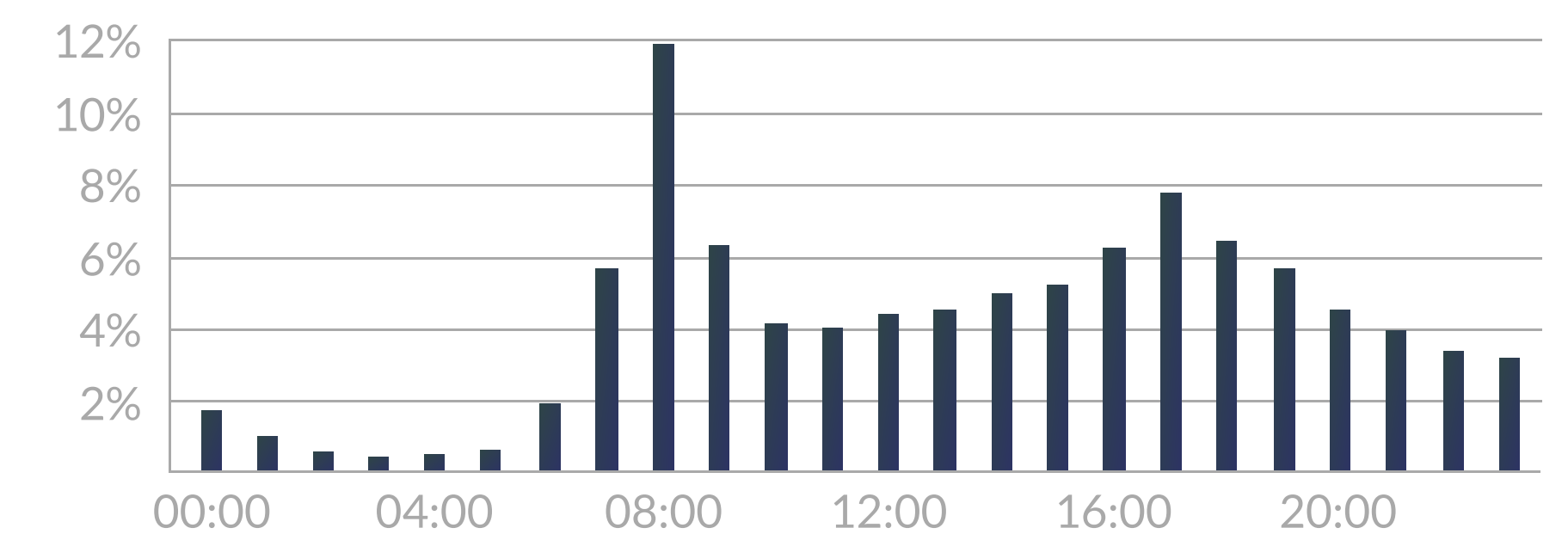
The municipality is working actively to develop shared mobility services: it launched its first mobility hub in Buurschap te Veld and is set to implement 4 more within the city in order to answer citizens' worries about parking and promote usage of those services.

**i** 24% of all trips take place during the morning peak hours

## FLEET BREAKDOWN Q1 2023

MODES			
SERVICES	5	2	2
VEHICLES	1,500	500	65

## HOURLY TRIP DISTRIBUTION Q1 2023 - Weekday



## MALAGA SPAIN

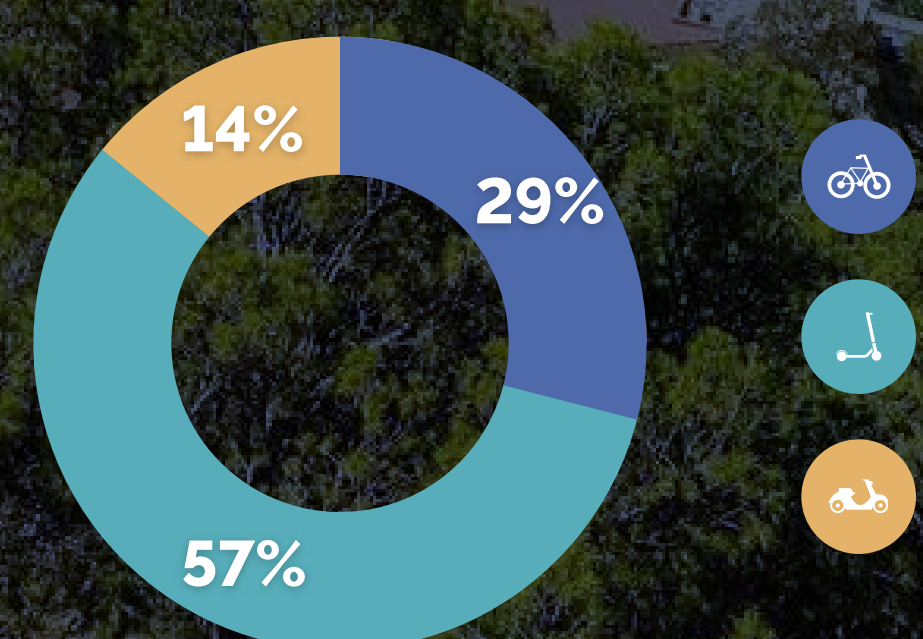
POPULATION DENSITY

**1,466**/km<sup>2</sup>

URBAN POPULATION

**580,000**

FLEET BREAKDOWN  
Q1 2023



Malaga finds itself in a bit of a pickle. When the City Council decided to launch a tender to select a single operator for shared bikes and scooters in the summer of 2022, it was blocked by the National Commission for Markets and Competition (CNMC). The body requested that the city cancel the tender as choosing one single operator for both services is in breach of the 'Market Unity Guarantee Law'. Awaiting the outcome of this judicial appeal, the city granted temporary licences to 6 scooter and 2 bike operators for 2023.

This unique situation has resulted in a low utilisation rate of both scooters and bikes (under 0.5 rides/vehicle/day in Q1 2023).

Whilst efforts have been made to address low parking density with 50 parking zones implemented near bus stops, metro and train stations to promote intermodality, there is still work to be done.

Despite the situation, moped services, which are operated under a free-floating model, are far more successful with 2.85 rides/vehicle/day.

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## TVD - All modes

Trips per vehicle per day - Q1 2023

	0.39
	0.32
	2.85





## METHODOLOGY

The European Shared Mobility Index gives an overview of the entire European market. An analysis of 100 European cities selected to highlight diversity in size, geography and market characteristics serves as the basis for the overall market sizing. A group of 33 cities were used to reflect the overall ridership trends for the report.

The Index encompasses shared bikes, scooters, mopeds and cars. Ride-hailing services (e.g. Uber, FreeNow), car-pooling (e.g. Klaxit, BlaBlaCar) and long-term rental services (e.g. Swapfiets) are not included. Regarding car sharing, only rentals by the minute, hour or day are included.

Multi-day rentals are not included. Vehicle and trip data was sourced directly from operators, open data sources, mobile applications and public announcements. Industry averages and some data extrapolation were used to fill remaining data gaps.

Companies who contributed financially to this report have not received any favourable treatment.

🔍 Please contact [harry.maxwell@fluctuo.com](mailto:harry.maxwell@fluctuo.com) for more





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## THANKS TO

ARVAL (Amélie Phelip & Simon Coppenolle)  
Bafang (Winnie Luo)  
Drover AI (Alex Nestic)  
SHARE NOW (Patrick Dillenberger)  
Segway-Ninebot (Vivi Fu)  
Wunder Mobility (Arne Lumme & Rosa Cruz)  
POLIS (Karen Vancluysen & Pedro Homem de Gouveia)  
Augustin Friedel

Acciona, Bird, BIT Mobility, Bolt, Cambio, Cityscoot, Cooltra, Donkey Republic, Dott, Enterprise Car Club, Felyx, GreenGo, Lime, MEC Sharing, MILES Mobility, Ridemovi, Ryde, Superpedestrian, TIER, Voi

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