



EUROPEAN SHARED MOBILITY INDEX

— Q2 2022 —



FULL SPEED AHEAD

For the first time in two years, shared mobility has enjoyed spring demand without lockdowns.

A mild April and May, followed by a hot June, led to significant increases in ridership on 2021 levels. The mode seeing the most growth in trips was, unsurprisingly, free-floating bikes. In the last edition, we reported that over 13,000 bikes had been added to fleets in Q1 - and this really shows.

It seems that in the largest cities, scooters have hit maximum capacity, but there is still room for growth in small and medium-sized cities. In some countries, however, policy continues to limit progress.

We are pleased to introduce two new cities to the report: **Budapest** and **Helsinki**, bringing the total cities covered to 22. In this edition, we focus on Budapest, with the help of **BKK** (Center for Budapest Transport). Since Helsinki is one of the cities implementing dedicated parking for shared bikes and scooters, we thought we would have a look at how this affects ridership.

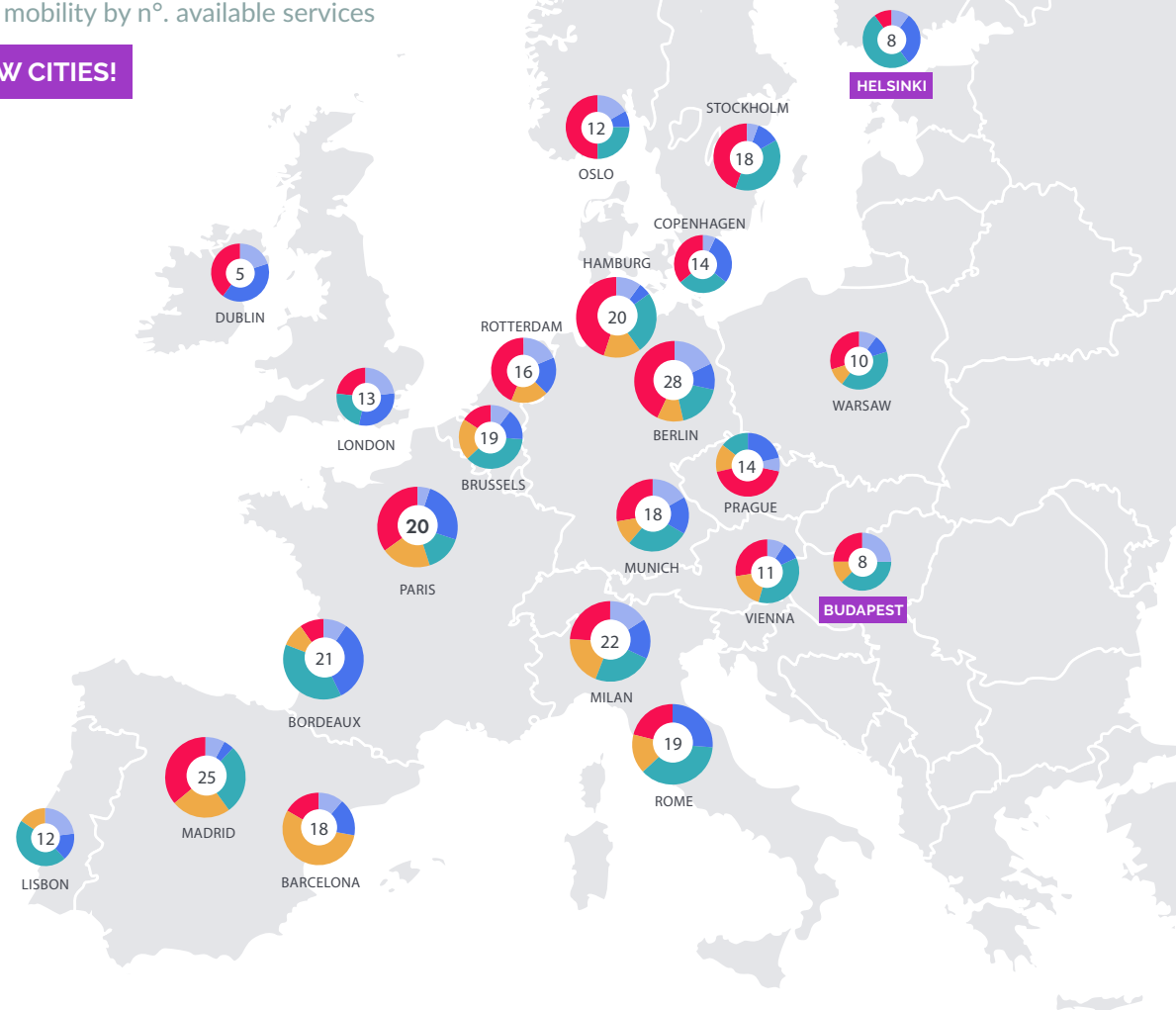
To bring you crucial policy insights - as well as a look at the future of VC money in mobility - we teamed up with **Inline Policy** and **Dealroom**. With the threat of climate change and recession breathing down our necks - how will cities and operators respond the socio-economic pressures of 2022?

N.B. We've changed our definition of what constitutes a car sharing service. See the 'Methodology' (p12) for full details.

22 CITIES 351 SERVICES

Shared mobility by n°. available services

2 NEW CITIES!



Bikes (station-based)
Physical or virtual stations



Bikes
(free-floating)



Scooters



Mopeds



Cars

AT A GLANCE

+380,000
SHARED VEHICLES

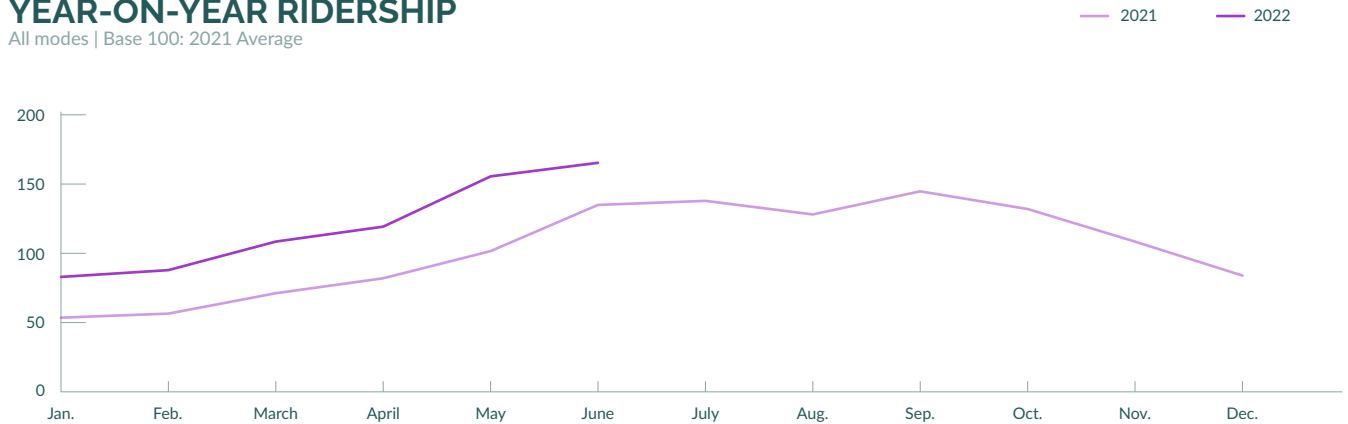
+40%
GROWTH IN
FLEET SIZE
Q2 2022 VS Q2 2021

+48%
GROWTH IN
RIDERSHIP
Q2 2022 VS Q2 2021

📍 RIDERSHIP

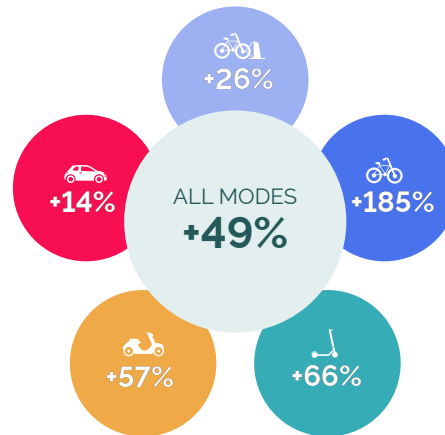
YEAR-ON-YEAR RIDERSHIP

All modes | Base 100: 2021 Average



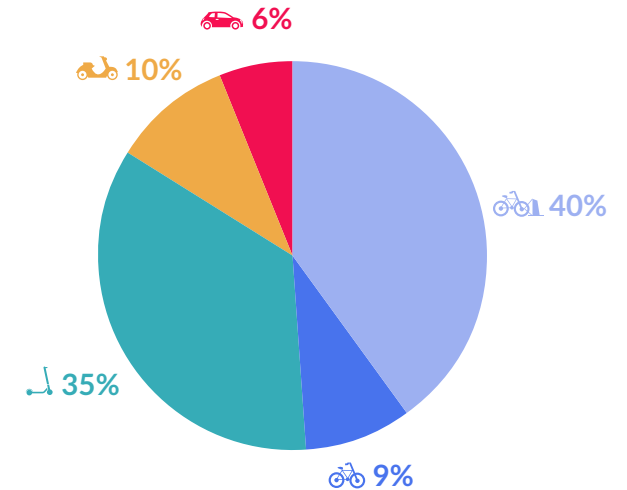
YEAR-ON-YEAR TRIP GROWTH

Q2 2022 vs Q2 2021



MODAL SHARE

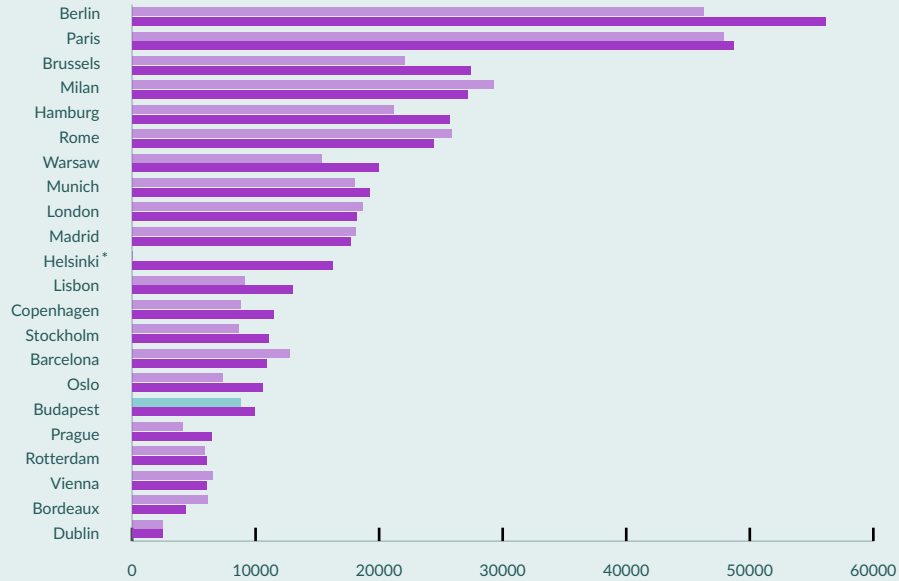
Total ridership per mode | April - June 2022



VEHICLES

QUARTERLY FLEET GROWTH

As of Q2 2022

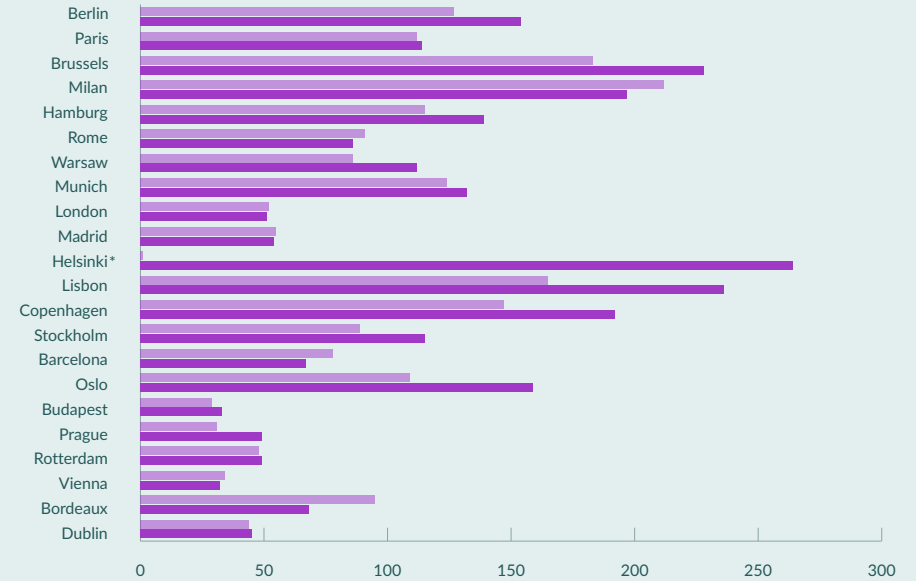


* Helsinki in wintering in Q1

— March 2022 — June 2022

QUARTERLY FLEET GROWTH PER CAPITA

As of Q2 2022



* Helsinki data not representative of reality due to wintering

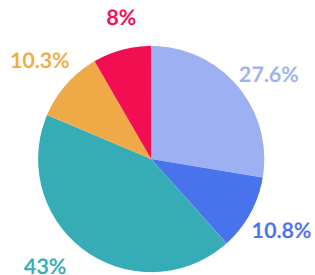
— March 2022 — June 2022

FLEET ACCORDING TO CITY SIZE

As of Q2 2022

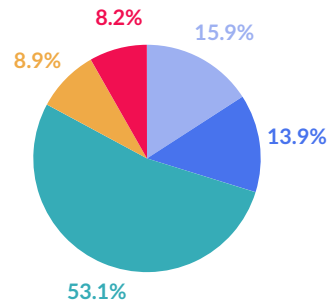
Population > 2m

Berlin, Budapest, London, Madrid, Paris, Rome



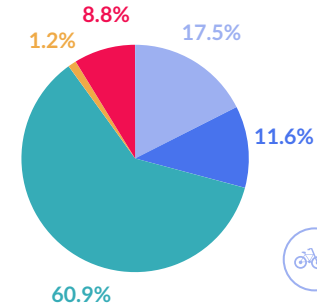
Population 1-2m

Barcelona, Brussels, Hamburg, Milan, Munich, Prague, Rotterdam, Vienna, Warsaw



Population < 1m

Bordeaux, Copenhagen, Dublin, Helsinki, Lisbon, Oslo, Stockholm



MARKETS & POLICY DEVELOPMENTS

NATIONAL GOVERNMENTS ARE STEPPING IN ON QUESTIONS OF SAFETY

This quarter, we are seeing national governments accepting that comprehensive nationwide guidelines can provide clarity for operators. National-level laws have been introduced in Spain and Norway to set a minimum riding age and mandate that e-scooter riders are insured. Spain has made helmets a requirement for e-scooter riders. The Finnish National Police Board publicly reiterated that e-scooters must comply with the same traffic regulations as other vehicles. The city of Florence tried to do something similar in April but was told by judges that helmet mandates can only be introduced via national legislation. In a similar vein, several large insurance companies in the UK called for clear national safety regulations to help strike the balance between transport innovation and rider safety in April 2022.

CITIES WANT MORE CONTROL OVER THE NUMBER OF E-SCOOTERS

During Q2, cities have moved to shrink the number of operators in several places across Europe. For cities, fewer operators mean fewer stakeholders to manage. Having few competitors in any given market is not necessarily a bad thing, as too many operators could negatively impact profits, but it does mean that tenders become higher-stakes affairs for operators. In the UK, councils have tended to use a one operator model thus far, so it will be interesting to see whether they continue in this vein or if they opt for a multi-operator model.

It also remains to be seen whether more cities opt for this option, and what the 'ideal number' of operators is perceived to be across Europe.

MORE AND MORE CITIES WANT TO INTEGRATE PRIVATE SUPPLIERS WITH PUBLIC TRANSPORT SYSTEMS

This quarter, a number of municipal/regional authorities announced their intention to bring shared mobility operators together in a single space, including Milan (IT) and Turku (FI). In the case of Milan, the authorities were keen to provide a service for users to access various transport options in a single place, whilst Turku simply integrated Donkey Republic into its broader public transport system. Making journeys seamless has obvious benefits for consumers, although there are technical challenges for operators and local authorities to overcome. In future, we expect to see more cities opt for this kind of strategy and for shared forms of mobility to increasingly be seen as indispensable parts of the urban infrastructure across Europe.



Matthew Niblett
Inline Policy



The specialists in tech policy and regulation



BERLIN

City announces plans for 38km high-speed cycle route through the city centre.



OSLO

City awards Bolt, Voi, and TIER licences to operate scooters



MUNICH

Miles adds Tesla Model 3 to fleet.



LONDON

TIER launches latest scooter model, Lime integrates with Uber and the e-scooter trial is extended to November.



ROME

City announces plans to cut the number of operators from 7 to 3 in 2023. Each operator would have 3,000 scooters each.



LONDON

Human Forest records 150,000 trips in a month



DUBLIN

Voi launches project with Dublin Bus.



LISBON

City offers free public transport to children, students and elderly residents.



WARSAW

Bolt launches with 250 electric bikes.



BERLIN

Bolt launches electric bikes, and the council is prepared to waive half of the cost of parking fees for free-floating car operators.



BARCELONA

AMB awards the €40.5m Bicing extension project to Nextbike, Movement and Movus.



MADRID

Free2move launches with 150 Jeeps, bringing their total fleet 850.



HELSINKI

Mastercard partners with Freebike to launch the world's first 'tap and ride' electric bike sharing system. Meanwhile, TIER, Voi, Lime, Bird and Dott want legislation to tackle the scooter chaos in central Helsinki.



BRUSSELS

Maximum speed of 20km/h brought in, 8km/h in pedestrian zones. Tighter parking restrictions and prohibited zones.



LONDON

Legislation to give TfL and London boroughs the power to fine motorists who infringe on cycle lanes.

APRIL

MAY

JUNE

CAPITAL INTELLIGENCE

“There is no doubt that a combination of cheap and abundant money, and inflated predictions of the power to change consumer habits, led to an overvaluation of tech stocks last year.

That time is over.

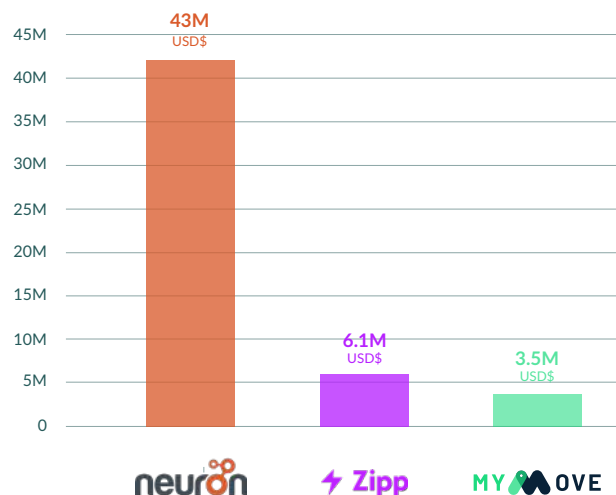
Rising interest rates and a gloomy outlook for the global economy have hit valuations of growth companies hard, in both public and private markets. We have already seen a come back to 'quality vs quantity'. Funds will continue to be made available for 'quality' companies which can prove their metrics, while fast cash-burning businesses will have a tougher time securing investment.



Lorenzo Chiavarini
Dealroom



FUNDING SECURED



ACQUISITIONS & IPOs

- Lyft acquires **PBSC** - the leading bike-share supplier (95,000 bikes worldwide) with schemes already in London, Barcelona, Clermont-Ferrand and more
- European micromobility startup **Reby** acquired by PE player **House of Lithium** for \$100M
- TIER** acquires the US company **Fantasma** providing a vision-based parking solution.
- Turkish operator **Marti** plan to go public via an SPAC merger with **Galata Acquisition Corp.**

POTENTIALLY LOOKING *

COMPANY	FROM	ACTIVITY
bondi		Operator
KAROS		Operator
GO <small>sharing</small>		Operator
GoMore		Operator
Bleeper		Operator
GoVolt		Operator
beryl		Operator

*These tables are based on a 'Dealroom signal', with a focus on timing. Disclaimer: this does not necessarily mean that investors want to fund them, but that the startup *might* be looking to raise.

WHY TECHNOLOGY IS THE KEY TO THE FUTURE OF SHARED MOBILITY

Inflation and rising fuel costs are once again presenting car owners in particular with new challenges. Flexible mobility is a central component of daily life and should be accessible to everyone, regardless of rising costs. SHARE NOW recognized this already years ago and thus brought car-sharing to life. The service now covers almost all the benefits of private car use, from spontaneous short-term rentals to pre-booked daily trips. Flexibility, however, is not enough: shared mobility is about combining the customers' mobility needs with simplicity.

Innovation: Revolutionizing, Yet Simple

In the world of shared mobility, the product is not the cars - the product is the technology behind free-floating car-sharing. What seems self-evident today, was still a major challenge more than ten years ago. SHARE NOW did not only revolutionize the field of mobility at the time with its simple idea of sharing instead of owning. The company also took mobility to a new level technologically. As the pioneer of free-floating car-sharing, SHARE NOW has worked tirelessly to make the use of car-sharing as easy as possible for its 3.7 million customers all over Europe. To make this work smoothly, SHARE NOW has developed a cloud-native microservice architecture. This means: in the background, 250 microservices control customer and fleet management to make car-sharing accessible in just a few clicks.

What simplicity is for the customer, is innovation for the product. SHARE NOW has transformed into a tech company over the years. The key to its success, however, was not only innovation, but above all organizational resilience. This includes boldly challenging the status quo and rethinking the tried and true as well as being adaptable.

Pioneering the Future through Technology

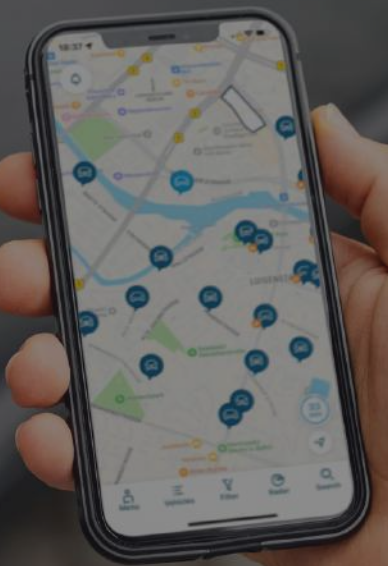
Since the invention of free-floating car-sharing in 2008, the world has become more digital and interconnected - and so has SHARE NOW. In the past, the shared vehicles could only be opened with the SHARE NOW member card, but today a quick confirmation in the app is enough for the vehicle to open automatically. The same applies to the driver's license validation process: previously customers had to go to one of the SHARE NOW offices to get their driver's license validated. 14 years later, the entire process is automated and can be easily managed via the SHARE NOW app.

Innovation does not stop with the product. It also means reacting to the changing mobility needs of the customers. In car-sharing, there is a strong demand for longer rentals. SHARE NOW took this as an opportunity for further pioneering work. The company was the first car-sharing provider to include long-term rentals of up to 30 days in its app. To round off the customer experience, this offer was soon expanded with convenient extras such as free pre-booking up to 100 days in advance (incl. delivery to pick-up location), cross-border trips and a second driver option.

Thanks to its broad tech ecosystem, SHARE NOW still is proud to say: car-sharing has by no means exhausted the full range of possibilities. It is the perfect testing field for new technologies - both for technologies that are already on the market and still being developed. Be it Big Data, Artificial Intelligence, or the future era of Autonomous Driving, by combining operations and technology SHARE NOW is ready for the future.



Slavko Bevanda
Chief Product & Technology Officer
SHARE NOW



"A LA MODE"

BIKE SHARING

Station-based bikes still represent an enormous chunk of rides in this report. Velib' (Paris), Bicing (Barcelona) and Santander Cycles (London) alone account for 50% of all bike trips! Free-floating bikes, however, have been gaining ground for a while now.

In the last 6 months - excluding the two new cities (Budapest and Helsinki) - 20,000 more free-floating bikes have entered the 20 cities covered. Free-floating bike ridership is +181%, owing to a flurry of launches from Bolt, Dott, Lime and TIER.

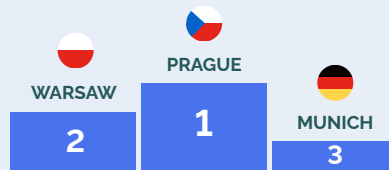
BIKE SHARING CHAMPIONS | 2022

Trips per capita | April - June 2022



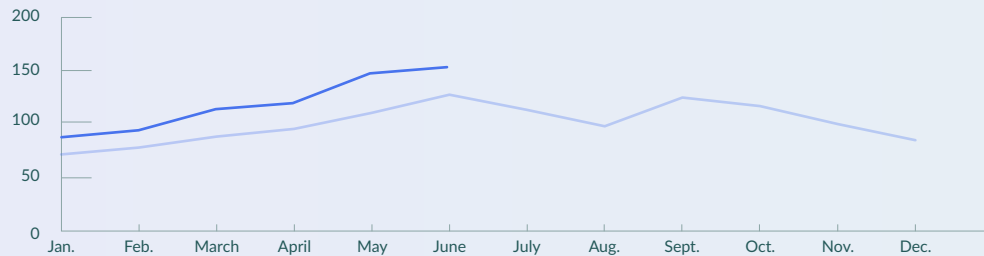
GROWTH IN TRIPS

Q2 2022 vs Q2 2021



YEAR ON YEAR RIDERSHIP

Base 100 | 2021 Average



SCOOTER SHARING

Scooters are now a staple in cities across Europe. Relative to cars or mopeds, they are easy to deploy and are more simple to launch at scale. With a more measured approach to launches and parking regulations now being taken by operators and cities, are we now witnessing a glass ceiling for the growth of scooters in cities?

It certainly looks like fleet caps are the way forward - something that is already the case in Paris, Copenhagen, Oslo and soon to be followed by Rome, Helsinki and others.

That is not to say that the industry is slowing down... On 2021 levels, Q2 ridership is up 201% in Berlin, 193% in Munich and 171% in Hamburg!

SCOOTER SHARING CHAMPIONS | 2022

Trips per capita | April - June 2022



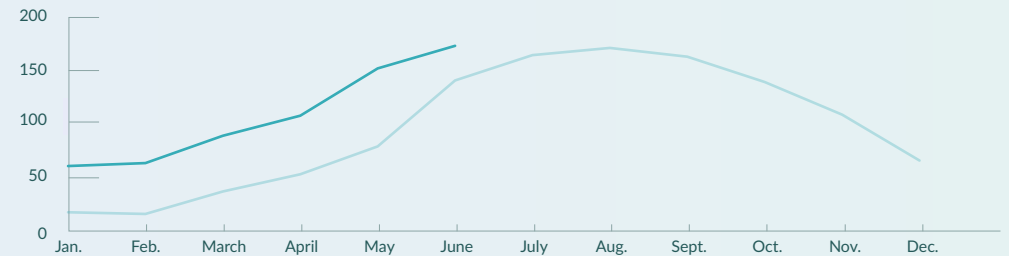
GROWTH IN TRIPS

Q2 2022 vs Q2 2021



YEAR ON YEAR RIDERSHIP

Base 100 | 2021 Average



“A LA MODE”

MOPED SHARING

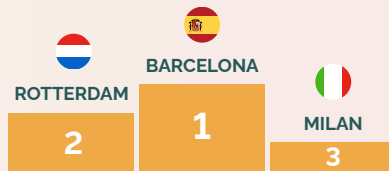
Mopeds seem to slip under the radar when we speak about mobility. Whilst scooters and bikes have been taking the headlines (largely due to the sheer number of launches), we are led to believe that mopeds have been less successful.

On the contrary, shared mopeds have experienced 57% ridership growth on 2021 levels, largely thanks to companies like Cooltra, felyx, Cityscoot, Acciona, Check and GO Sharing.

We have also seen that mopeds have experienced a 95% increase in trips per vehicle per day from Q2 2021 levels, demonstrating that the mode is being increasingly more adopted.

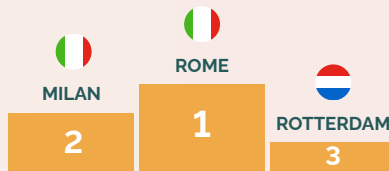
MOPED SHARING CHAMPIONS | 2022

Trips per capita | April - June 2022



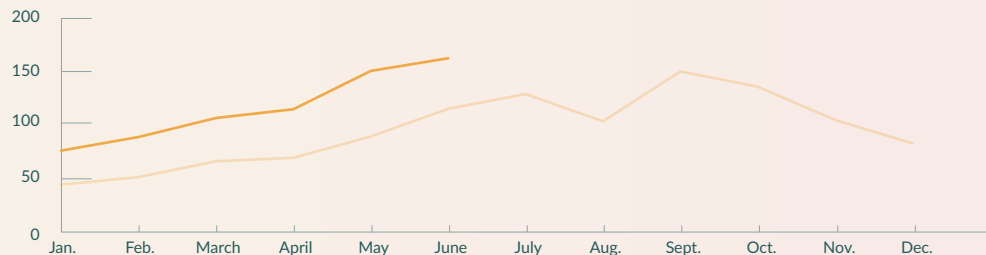
GROWTH IN TRIPS

Q2 2022 vs Q2 2021



YEAR ON YEAR RIDERSHIP

Base 100 | 2021 Average



CAR SHARING

As is the case with many of our reports, car sharing growth remains steady, not least when compared to the growth of micromobility.

However, Free2move's acquisition of SHARE NOW and the success of MILES in Germany tell us that there is a bright future for cars - if we can encourage people to ditch their personal cars. We believe that changing consumer behaviours is the biggest challenge facing this industry. Will cities have the political courage to back car sharing to reduce the number of private cars in the streets?

We've already seen Munich heading in that direction: parking spaces are now cheaper for shared cars, and they have pledged to reserve 1,600 spaces for shared vehicles by 2035.

CAR SHARING CHAMPIONS | 2022

Trips per capita | April - June 2022



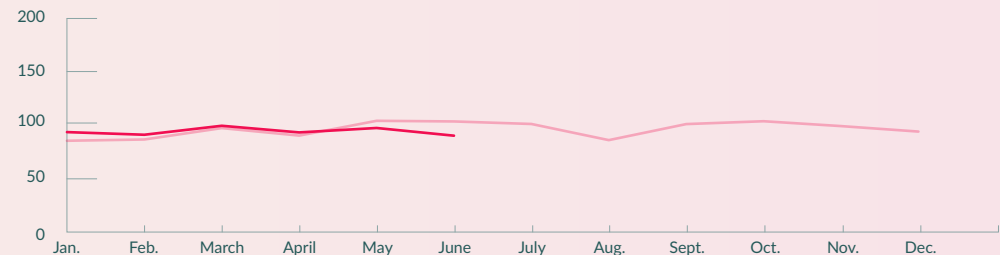
GROWTH IN TRIPS

Q2 2022 vs Q2 2021



YEAR ON YEAR RIDERSHIP

Base 100 | 2021 Average



FOCUS ON BUDAPEST

With a population of 1.7 million, Budapest is the ninth-largest city in the EU. It is home to continental Europe's first ever underground railroad, and to this day, the city continues to innovate on mobility policy.

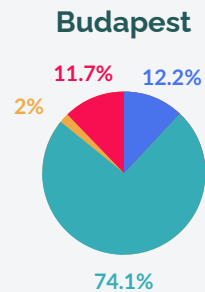
BKK's main goal is to push sustainable transport modes, such as public transport, cycling, walking or micromobility - creating an image where public transport is the 'backbone of the city', but 'walking, cycling and scooting are the legs and arms'. "Today, many think of cycling as a stand-alone mode to get from A to B - but we need to convince them that it can be used in conjunction with public transport", says Mate Sebok, Communications at BKK.

To discourage people from bringing their cars into the city centre, BKK is working on demand-driven public transport and micromobility/shared mobility. However, the smaller, district-level 23 municipalities have their say on whether there are free-floating, mandatory parking zones and 'no go' zones. On roads that are owned by the metropolitan municipality in the outer districts, free-floating is possible.

Like other cities, Budapest wants to adopt a very dense network of micromobility parking spaces (every 100m) in the downtown areas where parking needs to be stricter, with a wider downtown area with more parking zones (but less dense). The goal is to have 500 micromobility points implemented and active by mid-2023 and they are well on their way to achieving this goal.

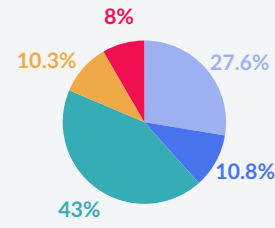
MODAL BREAKDOWN

MODES	OPERATORS	TOTAL NUMBER OF VEHICLES	VEHICLES PER 10.000 INHAB.
BIKES		1,250	7
SCOOTERS		7,600	43
MOPEDS		200	1
CARS		1,200	7
ALL MODES		10,250	

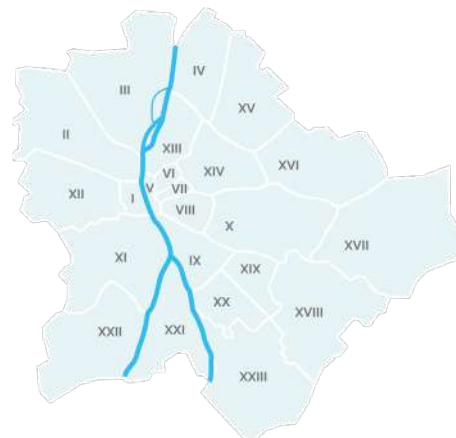
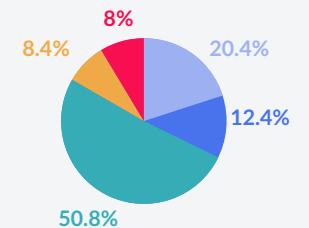


Population > 2M

Berlin, Budapest, London, Madrid, Paris, Rome



All 22 Cities



Each district gets to decide on micromobility parking regulations on the roads that they own.

FLUCTUO MODAL SIGNAL

- Currently, citizens can choose between **Donkey Republic** and **MOL Bubi** bikes (operated by BKK). With relatively small fleets, there could well be room for another bike operator.
- Since mobility hubs with increased capacity outside of big stations are being trialed, there may be a further opportunity in the outskirts of the city, as well as in the urban core.
- Growing the use of mopeds is a challenge - perhaps if an operator was willing to scale up their operations, shared mopeds could make more of an impact. However, Budapest isn't as moped-friendly as cities in Southern Europe.
- With a host of car sharing companies operating, including **SHARE NOW** and **MOL Limo**, car sharing is bound to have a bright future in this historic city.

Companies always talk about how important data-driven decisions are.

Well, trying to make data-driven decisions without all the facts is like trying to do a jigsaw puzzle with all the edge pieces missing.

Fluctuo is Europe's leading aggregator of shared mobility data.

We show operators and cities the bigger picture. Our team of mobility experts combine innovative data-collection methods with sophisticated algorithms to produce the most exhaustive and precise data on the market.

Every day, we analyse 250+ services in 110+ cities, giving operators the means to improve the performance of their operations, and cities the opportunity to benchmark their mobility ecosystems against others. City Dive can forecast future demand, assess the potential for an expansion, evaluate opportunities in new cities (or compare to other cities), help monitor a city before a tender, and much more.

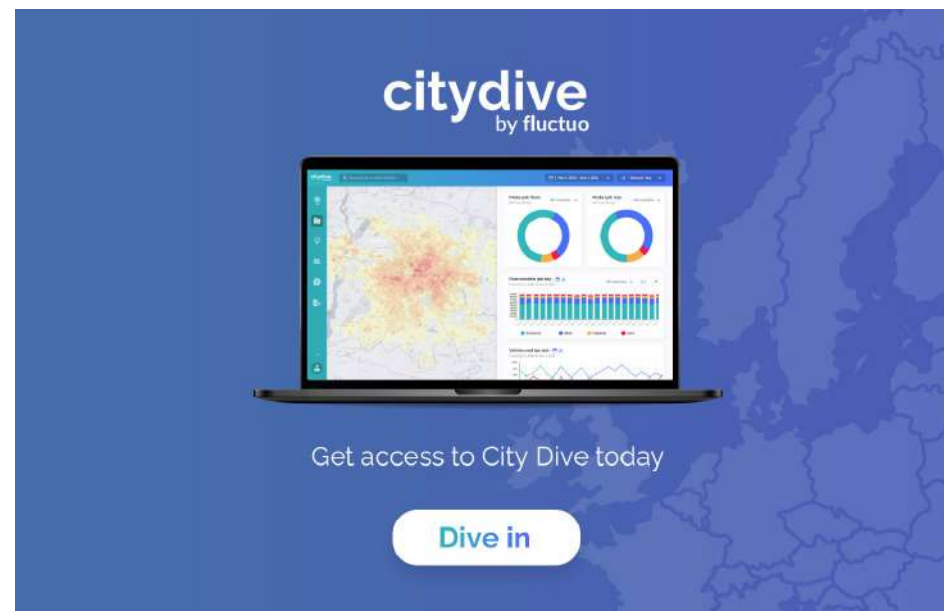
[Explore City Dive >](#)

¿Qué MaaS?

Fluctuo's API displays real-time vehicle information on 250+ services in 700+ cities, and allows users to book them through 3rd party apps.

Attract users for your MaaS app. Tell shopping centre visitors what scooters are available in the area. Power the micromobility revolution.

[Discover Data Flow >](#)



METHODOLOGY

The European Shared Mobility Index provides a quarterly snapshot of the market across 22 cities, selected to highlight diversity in size, geography and market characteristics.

The Index encompasses share bikes, scooters, mopeds and cars. This edition, we reformed our definition of car sharing, and included only rentals that are made by the hour or by the day - multi day rentals were not included.

Ride-hailing services (e.g. Uber), car-pooling (e.g. BlaBlaCar) and long-term rental services (e.g. Swapfiets) are not included. Unless otherwise indicated, all maps, tables, and graphics are point-in-time analyses based on available data as of 30th June 2022. Vehicle and trip data were sourced directly from operators, via open data sources, from mobile applications and public announcements. Industry averages and some data extrapolation were used to fill remaining data gaps.

Operators who contributed financially to this report have not received any special treatment. All graphics and tables appearing in this report are the exclusive property of fluctuo. Their use is authorized, subject to the notice of copyright.

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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.fr >



INVERS, inventor of automated vehicle sharing, enables mobility service providers to launch, operate and scale their offerings

with integrated telematics and software solutions, specifically designed for developers of shared mobility services. The company acts as an independent and reliable partner for operators such as SHARE NOW, Clevershuttle, Miles, Getaround, Flinkster, Tier, and Emmy. The development takes place entirely in Germany.

invers.com >



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 >



VAIMOO empowers transportation leaders to achieve a sustainable, efficient and comfortable mobility experience.

The official e-bike sharing system in Copenhagen and Rotterdam, VAIMOO has recently been adopted by Voi Technology to extend its e-scooter sharing service in the UK. Deployable both in docked and free-floating schemes, VAIMOO includes e-bikes, racks and a management platform that integrates with third-party transport for multimodal user journeys.

vaimoo.com >



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 >