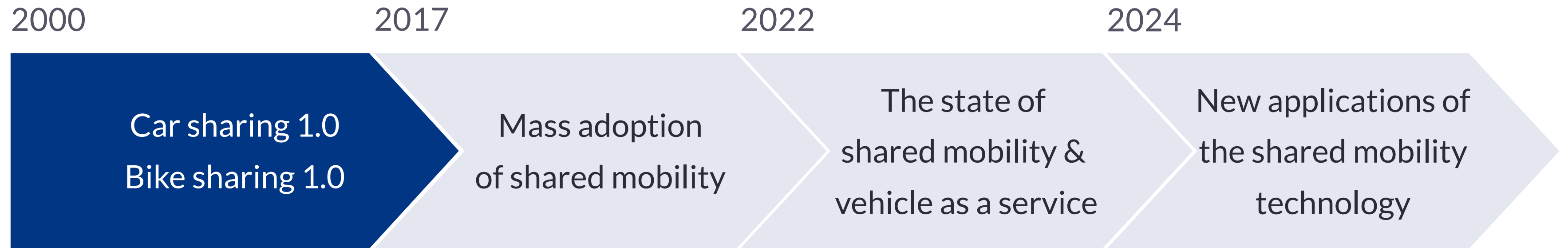


Transition to Vehicle-as-a-Service

The Shared Mobility perspective

A decade ago, mobility's future was uncertain. Today, it is about how we shape its rapid transformation.

The state of Shared Mobility



Early Experiments



Green Wheels
2000



2004
Coin-based
Bikesharing

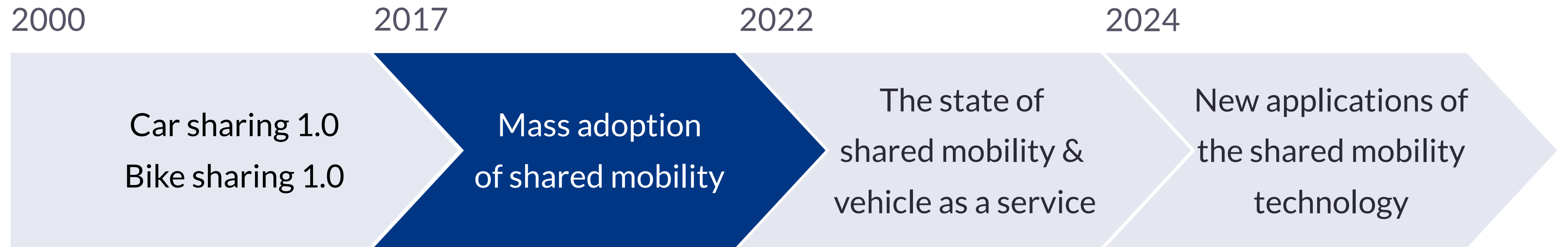


Zipcar
2000

Technological Gap

- Connecting the vehicles
- Interaction with users (Smartphone?)
- Payment / billing
- Infrastructure

The state of Shared Mobility



Mass Adoption



What triggered the shared mobility wave?

- People move away from ownership
 - Costs
 - Alternatives
- Technology Trigger
 - Smartphone
 - IoTs / connectivity
 - Payment
 - Costs (chinese hardware)

City Regulation

- Parking Rules
- Driving Rules
- Hardware regulation
- Data Monitoring (MDS, GBFS)

🕒 This article is more than 2 months old

Rented e-scooters cleared from Paris streets on eve of ban

Electric scooter rental experiment in French capital ends after 5 years of controversy



FORTBEWEGUNG

Neue Regeln für Leih-E-Scooter in Wien treten in Kraft

Das Parken am Gehsteig ist nun verboten, fixe Anmiet- beziehungsweise Abstellflächen werden eingerichtet

19. Mai 2023, 07:12, 293 Postings

Wien – In Wien gelten ab Freitag neue Regeln für Leih-E-Scooter. Parken am Gehsteig ist nunmehr verboten. Auch die Verwendung von fixen Anmiet- beziehungsweise Abstellflächen ist verpflichtend, wenn sich solche in der Nähe befinden. Auch Sperr- und Langsamfahrzonen, etwa in Parks oder bei Spitälern, wurden eingerichtet. Ursprünglich hätten die neuen Bestimmungen schon Anfang Mai in Kraft treten sollen. Allerdings hat ein Betreiber die Konzessionsvergabe beeinträchtigt.

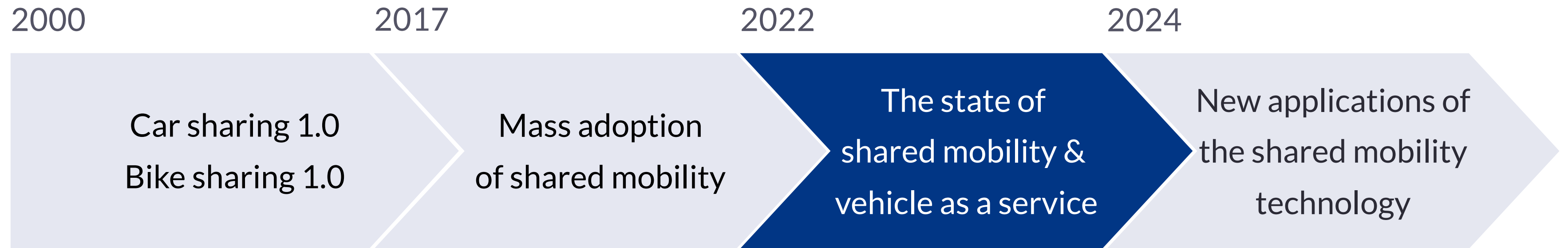
Das führte nicht nur zu einer Verzögerung, sondern auch dazu, dass einige Punkte noch nicht umgesetzt werden können. Betroffen davon ist etwa die Höchstzahl der Roller. Diese wird in den Verträgen mit den Betreibern



Für E-Scooter sollen in Wien nun fixe Abstellplätze, wie etwa auf dem Foto in Paris, eingerichtet werden.


Foto: IMAGO/viennaslide

The state of Shared Mobility




Vehicle-as-a-Service everywhere


2017




Scooter Sharing



Bike Sharing




Car Sharing




Moped Sharing




2023




Scooter Sharing




Bike Sharing




Delivery Vehicles




Moped Sharing




Corporate Sharing




Digital Rent a Car




Car Sharing




Mobility for Tourism




Subscription



Mobility Budget



Mobility for Real Estate Projects



Multi-Subscription

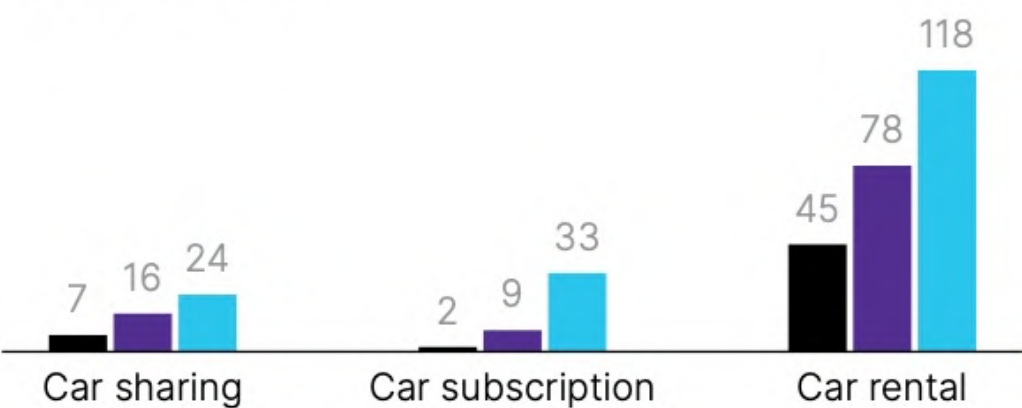
Market

Global value pool sizes by mobility service

2020 2025 2030

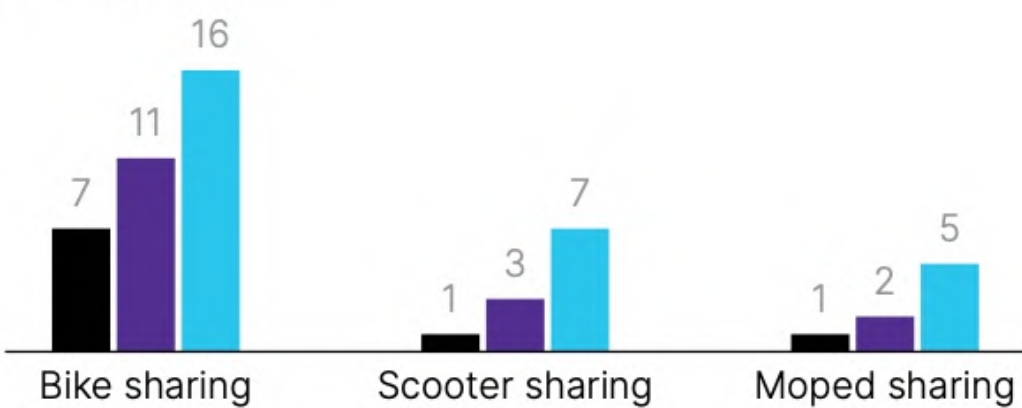
Car-as-a service

In billions of US\$



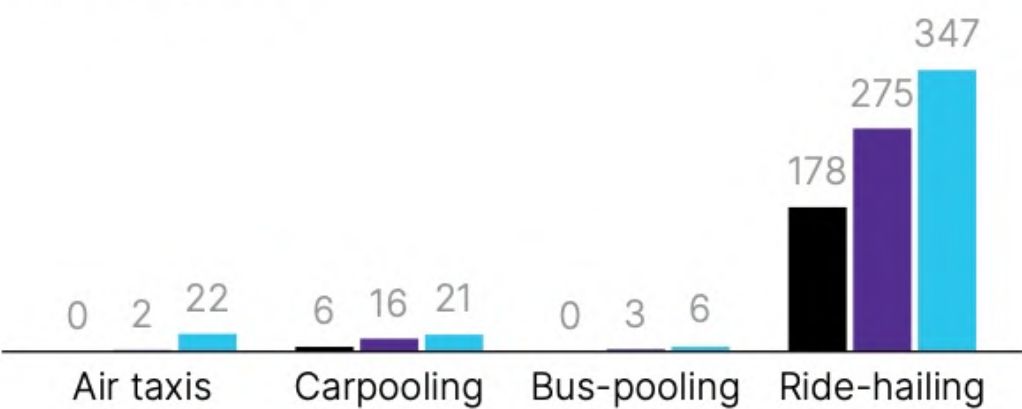
Micromobility

In billions of US\$



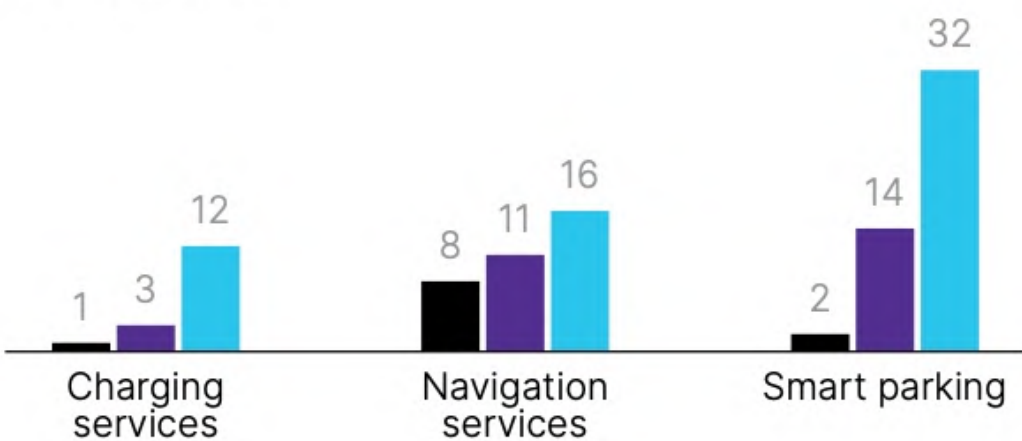
Ride-hailing and taxi services

In billions of US\$



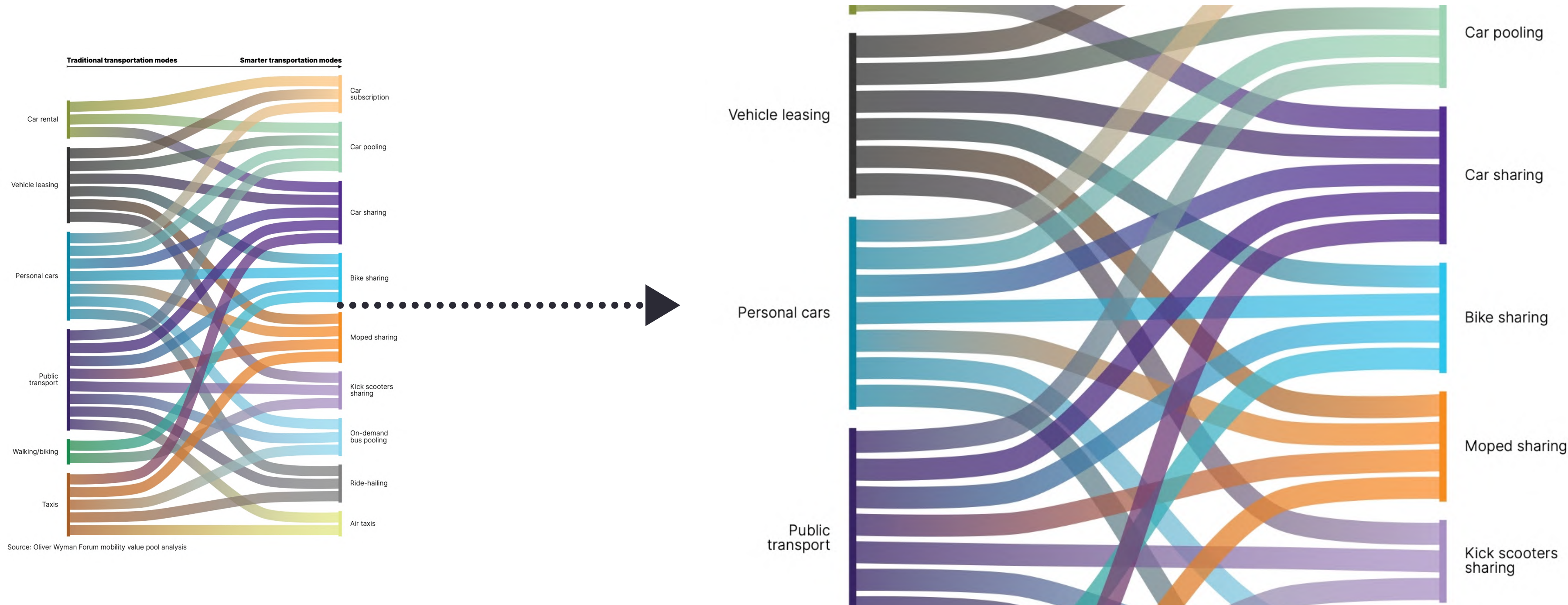
Complementary services

In billions of US\$



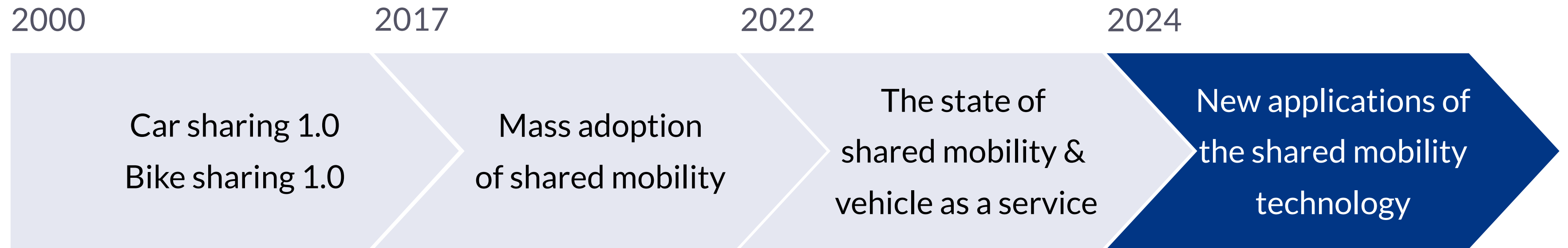
Source: Oliver Wyman Forum mobility value pool analysis

Smarter Transportation Modes



Six years after the start of the shared mobility wave over 80% of Germans have never or only once used kick scooters.

The state of Shared Mobility





Pool Vehicles

Internal car & bike sharing

Reduce costs and increase value

- Enhance the overall efficiency of the fleet to minimize the number of vehicles needed
- Offer cars, bikes and scooters incl. infrastructure to employees for more flexibility
- Provide employees with the option to reserve vehicles for personal use
- Enhance flexibility for departments with a company-wide on-demand fleet

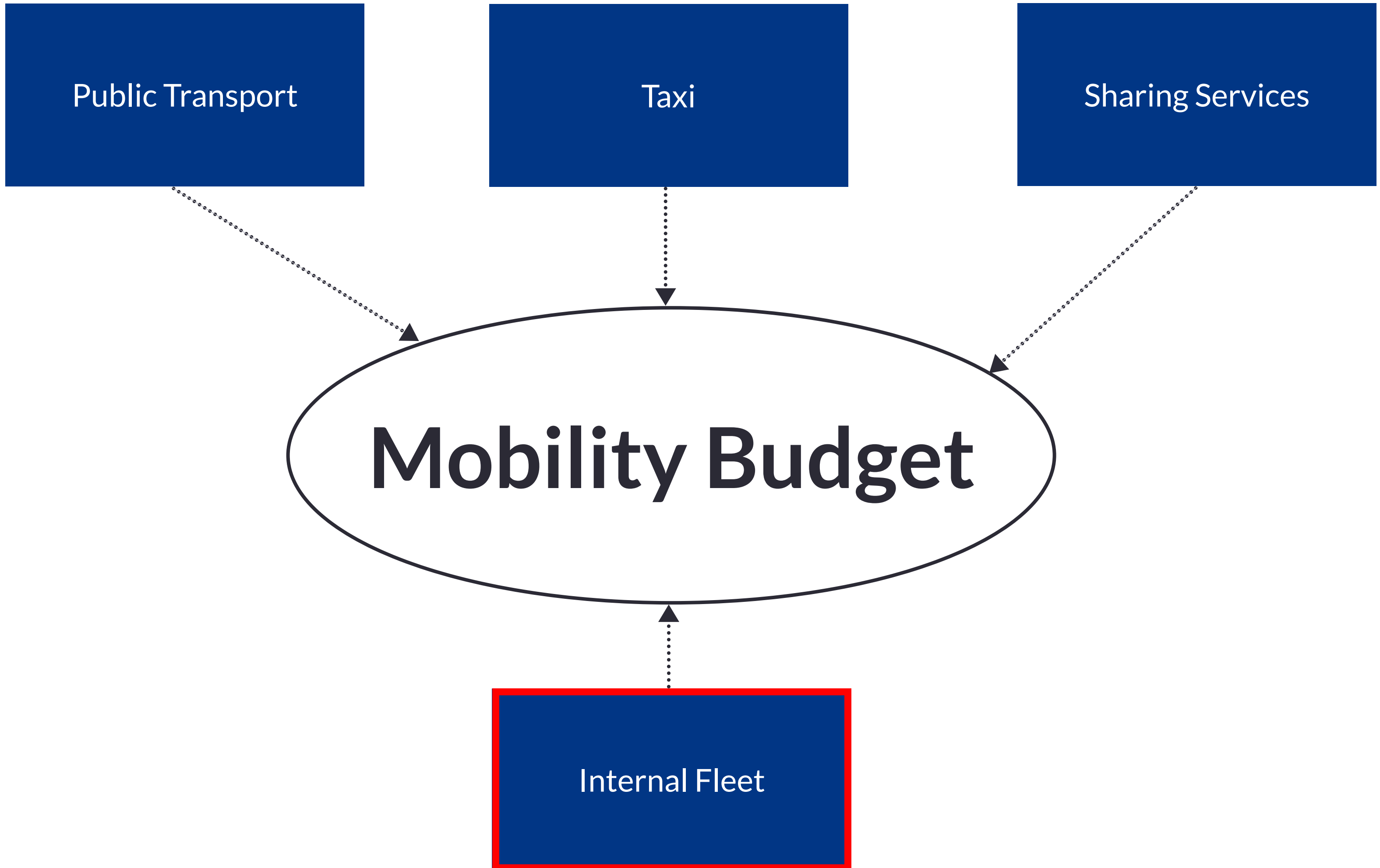
Public Transport

Taxi

Sharing Services

Mobility Budget

Internal Fleet





Tourism

Mobility offerings on regional level for seasonal workers and
tourists

SHARING SINCE 2016

About us

- 7 years of experience
- 100+ cities
- 30.000+ vehicles
- 20+ million trips
- Worldwide support



Q&A