



**NEW
EDITION
2024**

SUPPLEMENT

SHARED AMBITION: BENCHMARKING BIKE SHARING IN 148 CITIES

Benchmarking In Action: Results from the Velo-city 2024 workshop, 18th June 2024



Cycling
Industries
Europe

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SHARED AMBITION: BENCHMARKING BIKE SHARING IN 148 CITIES

Supplement – Benchmarking in action
Results from the Velo-city 2024 workshop,
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About CIE

Cycling Industries Europe is the voice of the cycling business, actively promoting the sector in Europe and worldwide. We represent leading companies and technology providers within the cycling industry that are powering a world-leading mobility transition in Europe, from manufacturing components and full bikes, e-bikes and cargo bikes and, crucially, developing and growing new business models such as bike sharing, bike leasing, last mile deliveries and digital services.

CIE's Bike Share Expert Group

CIE's Expert Group on Bike Share represents the leading European Bike Share Operators and Service Providers making sure bike sharing has a prominent role in the EU's policies, measures and funding. The expert group members include: Donkey Republic, Fifteen, TIER-Dott, PBSC, nextbike, Inurba Mobility, Urban Sharing, Qucit, Beryl, BCycle, Cargoroo, Cooltra, Fluctuo, MobilityData, Abimota, Bikmo, Blubrake, Smart Serial Number, Pin Bike, Lanterne, Zukunft Fahrrad, Velogik and Vianova.

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This workshop was an open session with diverse contributors, therefore the subjects discussed and the recommendations made are published separately from our main benchmarking report and therefore should not be recognized as the opinions of CIE or any of its members or any recommendation on contractual or commercial policy by CIE or its members. For a full statement on how we deal with anonymity and commercial sensitivity please read the appropriate paragraph in our main benchmarking report.

ABOUT THIS DOCUMENT: BENCHMARKING IN ACTION

Cycling Industries Europe (CIE) has published two editions of its influential benchmarking report “Shared Ambition: Benchmarking bike sharing in 148 European cities”

The report strongly encourages cities, associations, academics and other stakeholders with an interest in promoting cycling and bike sharing as part of public transport to use the benchmarking indicators as a way to discuss and exchange on the development of bike sharing with a clear set of performance indicators. A copy of the full reports can be found here:

[2023 Edition](#) | [2024 Edition](#)

To encourage this process of benchmarking CIE's Bike Share Expert Group and the MegaBITs project hosted an open workshop at the world's leading cycling policy conference Velo-city, which encouraged attendees to develop recommendations for a same of 15 cities based on extracts from the benchmarking data.

This document is a supplement to the 2024 report presenting a summary of the findings from each group at the workshop as collated by the groups and their facilitators.

HOW IT WORKED

Cycling Industries Europe's bike share experts gave a sneak preview to the 2024 edition of the study findings for an audience of 100 people who then discussed observations on selected cities. The attendees were divided into 10 roundtables, each of them focusing on one or two selected cities. As well as the benchmarking data some additional information (called “city context” in the notes below) was provided. In some cases there were also attendees who knew or worked with the city or a the bike share operator who was present in that city, where this was the case it is noted in the report for full transparency. The recommendations noted reflect the whole group regardless of any affiliation.

The overarching guiding questions were:

- What could be the reasons for this observation?
- How could the city double Bike Sharing ridership by 2030?

HOW TO USE THIS SUPPLEMENT

The workshop sampled a few cities and did not necessarily have experts present from each city to put the results in context so it is not a definitive set of city recommendations, it is an example of the process.

It is presented as a live example of how diverse groups can provoke discussions using selected city data and having access to some experts in the topic. CIE's Expert Group on bike sharing hopes that every EU city will conduct similar evaluations of their own bike sharing performance using the full CIE benchmarking report or similar sub-sets of the data. This could also be facilitated on a national, regional or cross-border basis. If your city or organization would like carry out such a process and would like support or expert facilitation please contact CIE via info@cyclindingustries.com

ANTWERP

City context

Antwerp has achieved a top 5 position for bike-sharing in 2023. Despite a high level of private bike ownership and a substantial modal share of cycling in both the city and the surrounding region, Antwerp boasts a remarkable number of daily trips per 1,000 inhabitants. Historically, it was believed that high private bike ownership would make bike-sharing less viable, especially in regions like the Netherlands, Denmark, and Flanders. However, Antwerp's success challenges this notion, providing a valuable comparison for similar cities.

Observations from the report

Antwerp's inclusion in the top 5 cities for bike-sharing is noteworthy given the high level of private bike ownership and modal share. The city has a significant number of daily trips per 1,000 inhabitants, which demonstrates the viability of bike-sharing even in areas with high private bike ownership. This success story serves as an important benchmark for other cities with similar characteristics.

Discussion points

The round table discussed the potential benefits of adding electric bikes to the bike-sharing fleet and the need to simplify the bike-sharing system by consolidating it into a single public bike-share system.

Recommendations to the City of Antwerp

- 1. Add Electric Bikes:** Integrating electric bikes into the bike-sharing fleet can cater to a wider range of users, including those who may not feel comfortable using traditional bikes for longer distances or in hilly areas. This can increase the overall usage of the bike-sharing system and attract new users.
- 2. Simplify the Bike-Sharing System:** By consolidating the various bike-sharing services into a single public bike-share system, the city can reduce confusion among users, streamline operations, and potentially lower operational costs. A unified system would make it easier for residents and visitors to use the service, thereby increasing the number of bike trips.



Antwerp



City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
523,248	2	5,905	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	36.1	117.1	3.1
Rank	2	3	13
Public scheme(s)			
Type	No. shared bikes	Electrification rate	Pricing Info
Docked	4,300	0%	Unlimited 30 min free
Hub-based	1,605	85%	5/12/58€ / day/week/year
Private scheme(s)			
N/A			



BARCELONA METRO



City context

The introduction of Bicing in Barcelona has generated remarkable enthusiasm among its residents. In 2023, Bicing recorded over 17.6 million trips and boasted 148,000 subscribers. E-bikes have quickly become the preferred choice for many users, particularly during the summer months where an e-bike is averaging more than 11 trips a day. According to a City Council report, 72% of the system's trips are made on electric bikes, with 8 out of 10 users favouring e-bikes for their daily commutes.

Observations from the report

1. Barcelona is a top 3 performing city (#3) in regards to vehicle utilisation efficiency ("trips per bike per day" indicator) but does not appear in the top 10 of the main indicator "trips / 1,000 inhabitants".
2. Barcelona is amongst the best performing cities for trips per bike per day outside of our Top 10. It scores over 4 for this metric, but it ranks low on the number of trips per 1,000.

Discussion points

Our table had a good knowledge of Bicing and was familiar with the fact that Barcelona possesses a strong bike-share history. Bicing is one of the most iconic bike-sharing systems in Europe that is clearly supported and enhanced by the great cycling infrastructure the city developed year after year. The inhabitants have adopted the Bicing bikes and we can say that it's part of the City's DNA. One key factor of this continuous success is without any doubt the inclusive pricing offered since its inception. Overall, the system also benefits from a complete support provided by the Municipality of Barcelona who has structured the mobility through BSM.

Recommendations to Barcelona Metro

The group established a list of priority items in order to double the ridership in the City:

- Optimise clusters density to generate more availability and flexibility for end users
- Increase the service area throughout the Metropolitan Area
- Increase the e-bike fleet
- Develop a deeper integration with existing public transit
- Establish contractual incentives to encourage the operator to exceed established KPIs

City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
1,620,343	6	9,534	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	10.6	19.6	5.4
Rank	12	65	3
Public scheme			
Type	No. shared bikes	Electrification rate	Pricing Info
Docked	7,000	100%	Unlimited 30 min free 5/12/59€ / day/week/year
Private scheme(s)			
Type	No. shared bikes	Electrification rate	Pricing Info
Dockless	2,534	80%	3€ / 30 min (pedal bike) Avg 1€ unlock+0.25€/min



BILBAO

City context

Bilbao is a dense city, a contained territory shaped like a bowl and quite hilly. It currently has a bike share system with 750 electric bikes and 46 stations. The majority of the stations are located in the relatively flat city centre, with only a few located in the suburbs. The city is renewing their scheme at the moment and will increase the fleet to 1250 ebikes.

Observations from the report

Bilbao is the best performing city for vehicle utilisation ("trips per bike per day" indicator) but it does not appear in the top 10 of the main indicator "trips / 1,000 inhabitants".

Recommendations to City of Bilbao

The observation shows that there are not enough bikes in service, compared to the population size. Furthermore, the trips are predominantly concentrated in central areas of the city. Hence, the group discussed the need for more bikes and stations, especially in the peripheries of the city. The 100% electrification of the fleet is a strong success factor and should be kept. A communication strategy to make residents from the outskirts use the system more often as well, was also mentioned as an impactful measure. As the system is quite established and perceived as a very positive service by locals, the fare structure could reflect that by differentiating between higher regular fares for those who can afford and discounted fares for low income.



City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
902,093	1	750	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	36.1	117.1	3.1
Rank	29	96	1
Public scheme			
Type	No. shared bikes	Electrification rate	Pricing Info
Docked	750	100%	Unlimited 30 min free 20-25€ / year
Private scheme(s)			
N/A			



BOLOGNA



Bologna



City context

Bologna, a historical city in Italy with a population of ca. 392,000, has made significant strides in promoting shared mobility. The city offers a range of shared mobility options, including car-sharing, scooter-sharing, and bike-sharing, despite the absence of e-scooter services. Bologna has recently enhanced its bike-sharing program by increasing fleet size and offering a free service to public transport subscribers for the entire year of 2024.

City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
394,374	1	2,847	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	14.8	72.2	2.0
Rank	7	10	25
Public scheme			
N/A			
Private scheme(s)			
Type	No. shared bikes	Electrification rate	Pricing Info
Hybrid	1,605	50% (est)	0.19€ / min (subsidised)

Observations from the report

Bologna, along with Florence and Padua, has entered the top 10 cities for bike-sharing based on the “trips per 10,000 inhabitants” indicator. The city scores high on the “bikes per 10,000 inhabitants” indicator but relatively low on the “trips per bike per day” metric, indicating room for improvement in the utilisation of available bikes.



Discussion points

1. Increasing the number of bikes to ensure better availability and accessibility.
2. Integrating bike-sharing with the existing public transport system to offer seamless multimodal transportation options.
3. Providing more charging solutions for e-bikes to enhance convenience and usability.
4. Making the service affordable but not entirely free to ensure sustainability and encourage responsible usage.

Recommendations to the City of Bologna

1. Increase the number of bikes: Aim to achieve a target of 1 bike per 100 inhabitants to ensure sufficient availability and reduce wait times for users. This will make bike-sharing a more viable and attractive option for daily commuters and occasional users alike.
2. Integrate with public transport: By integrating the bike-sharing system with public transport services, the city can offer a seamless multimodal transportation experience. It can be achieved through unified payment systems, shared mobility hubs, and coordinated service schedules.
3. Enhance charging solutions for e-bikes: Providing more charging docks and stations for electric bikes will make it easier for users to rely on e-bikes for their daily commutes. This can help increase the adoption of electric bikes and reduce the dependency on traditional vehicles.

COPENHAGEN

City context

Greater Copenhagen, with a population of over 1.3 million inhabitants across 29 municipalities and covering 2,561 km², launched its Bycyklen bike share system in 2014. It went bankrupt in 2022. In the meantime, since Covid, the Municipality of Copenhagen has awarded licences to operate to private bike-share operators to provide pedal and e-bikes to the city. Currently there are around 6,000 shared bikes in Copenhagen, 50% of the fleet being e-bikes.

City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
1,320,628	4	6,906	88%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	6.9	52.3	1.3
Rank	25	18	41
Public scheme			
N/A			
Private scheme(s)			
Type	No. shared bikes	Electrification rate	Pricing Info
Hub-based	6,906	50%	3.5€ / 30min (pedal bike) Avg 1€ unlock+0.33€/min

Observations from the report

A 48% increase was observed in Copenhagen across multiple operators. (#5 in "most improved cities" YoY).

Discussion points

The round table participants discussed the surprising success of the unsubsidized bike program, exploring ways to further increase bike usage in a city already known for its cycling culture. They examined the factors contributing to the recent surge in bike use and brainstormed strategies to maintain this positive momentum, incorporating their findings into actionable recommendations.



Recommendations to City of Copenhagen

- MaaS integration: Develop a Mobility as a Service (MaaS) app that includes private bike-share operators so the users can easily get a bike where they are.
- Expanded service area: Increase the geographical coverage of the bike-share program.
- Fleet expansion: Add more bikes to the existing fleet to meet demand.
- Financial Incentives, to support the operators to do the above: Explore subsidising a portion of rider fees to make bike share more affordable.
- Pricing optimization: Use subsidies to create more attractive pricing models.

FRANKFURT

City context

Frankfurt is the most populous city in the German state of Hessen. Its 773,068 inhabitants as of 2022 make it the fifth-most populous city in Germany. The city has three bikeshare systems, one public and two private.. In total almost 4000 bikes are available across the three operators.

Observations from the report

1. Frankfurt witnessed a growth of 100% for “trips per 1,000 inhabitants” compared to 2022.
2. Frankfurt’s “trips per bike per day” indicator has risen 159%.
3. In 2023 Frankfurt is amongst top 20 cities for “bikes / 10k inhabitants” but only #49 in terms of daily trips / 1,000 inhabitants.

Discussion points

The group had limited knowledge of the Frankfurt systems and city beyond the information provided. The group pointed out that based on the report

Frankfurt was moving in the right direction however there were a number of points that could be addressed to improve the cities performance metrics and cycling adoption.

One of the already established bike sharing schemes, which includes 500 bikes, was modernised in 2022.

Recommendations to City of Frankfurt

With only a small portion of the bikes available being electrified, the first suggestion was to increase the number of electric bikes in Frankfurt as the impacts of increased electric bike numbers are evident based upon other cities. Other recommendations included providing well maintained and modern bikes, one application with a simple, easy to use interface to view, book and pay for rides across all of the providers. Having an exclusive contract with a larger fleet size was presented as an alternative option.



Frankfurt



City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
751,372	5	3,209	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	2.9	42.7	0.7
Rank	49	19	67
Public scheme			
Type	No. shared bikes	Electrification rate	Pricing Info
Dockless	800	0%	1€ / 15min Unlimited 30 min for 10/60€ / month/year
Private scheme(s)			
Type	No. shared bikes	Electrification rate	Pricing Info
Hybrid	2,409	0%	diverse



GRENOBLE METRO



Grenoble



City context

For many years, Grenoble municipality has been prioritising long term rental bike service over shared bikes as they have 10K Mvélo+ mechanical bikes available (e-bikes, kid’s bikes, tandem, vélo cargo...) and a few hundreds of e-bikes. The Mvélo+ service offers 2,500 cycle parking spaces across the Metropolitan region.

Since July 2022 an exclusive, dockless and multi-modal e-bike and e-scooter scheme is available. The service is offered across 17 municipalities in the Metropole Grenoble- Alpes, covering 83,4km2 and serving ca. 366,000 inhabitants. It is 100% hub-based with 600+ parking hubs, no free-floating. Initially the fleet comprised 2.100 e-bikes and 2.100 e-scooters. In 2023, the bike fleet reduced to an average of 1.020.

Observations from the report

1. Grenoble ranked #2 in terms of “bikes per 10k inhabitants in 2022, but only #14 in terms of “trips per 1,000 inhabitants”.
2. In 2023 Grenoble only ranks #12 in terms of “bikes per 10k inhabitants” and #15 in terms of the main indicator “trips / 10k inhabitants”.

Discussion points

A representative of the operator informed the group that the operator has right-sized the fleet size of bikes (50% less than 2022), to ensure a reasonable utilisation of vehicles.

The commercial model was discussed as well. Grenoble is one of the few cities in the top 20 of this report, which does not invest anything into bike sharing given its focus on the Mvélo+ scheme. Relying completely on private investments and usage revenues, the service needs to be optimised for profitability. Hence, despite all efforts to provide an affordable service of less than 2€ per trip on average, the service isn’t affordable for low-income people.

Recommendations to Grenoble Metropole

Consider supporting the operator with targeted micro-subsidies in order to make the system more affordable for everyone, either through subsidised low-income passes, or subsidised trips in defined areas which are under-served or where the service is under-utilised.

City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
158,198	1	1,020	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	3.6	64.5	1.5
Rank	15	12	35
Public scheme			
N/A			
Private scheme(s)			
Type	No. shared bikes	Electrification rate	Pricing Info
Hub-based	1,020	100%	1€ unlock + 0.29€/min, day, week passes



KARLSRUHE



Karlsruhe



City context

Karlsruhe, a city of 313,000 inhabitants, had the promotion of cycling on its agenda for many years and is continuously expanding its bicycle-friendly infrastructure accordingly.

Parts of the city centre are already closed to car traffic and this development is continuing step by step. With traffic-avoiding urban and spatial planning, the share of active mobility is to increase to 70 percent of total traffic volume by 2035 at the expense of motorised private transport.

Observations from the report

1. Karlsruhe is amongst the best performing cities for trips per bike per day outside of the top 10, scoring over 4 for this metric.
2. Karlsruhe ranks low on the number of trips per 1,000 inhabitants.

Discussion points

There has been a well-established bike sharing system for many years, which was renewed in 2019 and has since been continuously expanded to more peripheral areas. Today it comprises Karlsruhe and 6 additional municipalities, providing an active travel alternative for commuters. The usage is naturally lower than in the well frequented city centre and it needs time to change the behaviour and provide a good density of bikes also in these more peripheral areas. For operators this means lower rental revenues and higher service costs due to the further distance. The project is subsidised by the regional Public Transport Authority.

The system is integrated into the public transport offer, in terms of fare structure, locations and brand. Public transport subscribers receive a discount and can rent the bikes free of charge for 30 min per ride. There is a cooperation with local universities. Students ride for free as part of their semester tickets and thus form a heavy user group, explaining the high utilisation rate.

Recommendations to City of Karlsruhe

Karlsruhe's path to a sustainable mobility transition is very visible. In order to make the system attractive to more users, the densification and expansion should be continued and consideration should be given to allowing public transport subscribers to cycle not only at a reduced price but completely free of charge. Also the diversification of the fleet should be continued, for example with cargo bikes, which have been added recently as well.

City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
308,998	1	630	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	8.4	20.4	4.1
Rank	17	63	6
Public scheme			
Type	No. shared bikes	Electrification rate	Pricing Info
Docked	630	0%	1€ / 15 min Unlimited 30 min for 10/60€ / month/year
Private scheme(s)			
N/A			



LJUBLJANA



Ljubljana



City context

Ljubljana is one of the smallest European capitals with less than 300,000 inhabitants on 164 square kilometres. The entire inner city area is reserved for pedestrians and cyclists and offers “green” recreational space for meeting and relaxing. In addition, many cycle paths have been established.

The first 60 min for the pedal bike rental system is free of charge. In 2022, a station-based e-bike system was introduced, which is also very affordable with various subscription offers and discounts for schoolchildren and students.

Observations from the report

Ljubljana is in the top 10 performing cities, but with smaller fleet sizes relative to its population.

Discussion points

The observation shows that medium-sized cities in particular have great potential to successfully establish bike sharing, even with a small number of bikes relative to the population, if the infrastructure and city geography allows for safe and convenient cycling.

The increase in use coincides with the recent introduction of the e-bike system. The regular bikes are relatively old and belong to a different system. The free or low-cost use of all rental bikes is a positive aspect. A higher number of rental bikes, in the sense of a densification and expansion to other areas of the city, could lead to a further increase in usage. However, funding must be secured for this, as a lower usage rate per bike per day can be assumed, especially in more peripheral areas.

Recommendations to City of Ljubljana

Full integration into the public transport system would be desirable, both in terms of space and fares. The bikes do not have to be free for everyone, but only for public transport subscribers or, in a mid-sized city, 15 min free per ride would be sufficient to cover most use cases.

New bikes with an appealing, contemporary user experience will ensure an increase in usage, so a modernization of the pedal bikes would be desirable. It would also make sense to merge the two systems or provide access via a single app and user account.

However, the example of the city also shows that a relatively small number of rental bikes can be sufficient for a mid-sized city that is centrally structured, meaning that cultural and public life takes place primarily in the city centre.

City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
286,745	2	1,670	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	26.0	58.2	4.5
Rank	3	15	4
Public scheme			
Type	No. shared bikes	Electrification rate	Pricing Info
Docked	1,670	16.7%	First hour free €1 for 2nd hr, €2 for 3rd
Private scheme(s)			
N/A			



City context

Lyon Metropole has a population of ca. 1.4 Mio inhabitants, comprising 58 municipalities and covering 533,7km². It is one of the first cities in the world to launch a bike sharing system in 2005. The system is operated by an outdoor advertising company and the service is part of an exclusive advertising contract. Costs to operate the bike sharing scheme are compensated from city advertising rights. The current contract expires in 2031. Since 2017 the fleet comprises ca. 30% electric bikes. In order to use them, users need to lease a battery and bring them along.

City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
1,411,571	1	4,161	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	18.7	29.5	6.3
Rank	6	45	2
Public scheme			
Type	No. shared bikes	Electrification rate	Pricing Info
Docked	4,161	30% only by using with private batteries	Unlimited 30 min free 4/31€ / day/year
Private scheme(s)			
N/A			

Observations from the report

1. Lyon is a top performing city regarding vehicle utilisation efficiency (“trips per bike per day” indicator) and appears in the top 10 of the main indicator “trips / 1,000 inhabitants”.
2. Lyon is a top performing city with smaller fleet sizes per population.
3. Lyon is an outlier from the other top 10 cities with 30 bikes per 10k inhabitants, which indicates that it is not impossible to deliver high numbers of trips at population level without a large fleet, but it should be examined as a special case study to understand its effectiveness.



Discussion points

The group observed that due to the relatively small fleet size compared to the inhabitants and the absence of more flexible dockless systems, the availability of vehicles are limited mainly to the central city and some points of interest. Thus the scheme is useful for power users but constrained in its ability to become a feasible mobility option for everyone.

It was also discussed that an exclusive contract over 25 years might limit the city’s ability to adapt the system and infuse innovation or scale it to meet additional demand.

Recommendations to Lyon Metropole

The group notes that Lyon might be a special case because of its contractual situation but made recommendations based on the evidence that other cities are getting a better benchmarked performance than Lyon, so the city is underperforming its potential.

- (1) increase the scope of the existing scheme, thus making the service more available in the wider metropolitan region, or (2) allow private operators to deploy fleets, preferable e-bikes to complement the predominantly mechanical bike based current fleet, on a more flexible concession basis.

MILAN

City context

Milan is a city in northern Italy, the regional capital of Lombardy, and the second-most populous city proper in Italy after Rome. The city proper has a population of about 1.4 million, while its metropolitan city has 3.22 million residents. Its public bikesharing system, BikeMi, is one of the largest in Europe and was launched in 2008. It has had several iterations and expansions over the last 16 years with the additions of bikes with child seats, e-bikes, geo-fenced stations and integration with the public transport authority, ATM. Private e-bike services have launched in 2022 and a 2023 tender has set the fleet size to 2,000.

Observations from the report

1. Milan is in the top 10 in terms of "bikes / 10k inhabitants" indicator, but ranking only #13 in terms of the main indicator "daily trips per 1,000 inhabitants".
2. In terms of "Bikes / 10k inhabitants" indicator, Milan climbed from Rank 8 (2022) to Rank 2 (2023). On the other side, regarding the main indicator "Daily trips per 1,000 inhabitants" it dropped out of the top 10.

Discussion points

The group observed that Milan improved its bikes / 10k inhabitants significantly between 2022 and 2023 following an increase in the fleet size of BikeMi which likely had an impact on the reduction of daily trips as the increased fleet didn't equate to increased ridership. Although the system has evolved over the last decade, the long-term contract provided to the operator and limited flexibility to upgrade the hardware of the system combined with the introduction of both shared mopeds and electric scooters may also have contributed to the lower ridership levels.

Recommendations to City of Milan

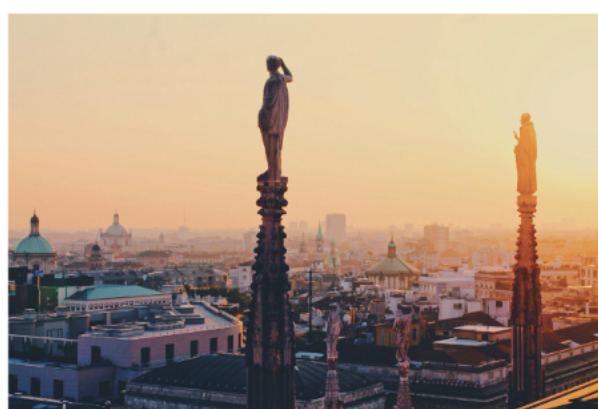
The group discussed the need for an increased electric bike percentage and upgrade of the hardware provided to foster innovation and the excitement of inhabitants for a new system to launch. The group also suggested an improved communications strategy to existing users and through the public transport integration to share information on the changes to the system, such as e-bikes and new stations, as visually this isn't evident. As with each city, recommendations to improve cycling infrastructure and on-street operations to maximise availability were suggested.



Milan



City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
1,371,185	4	16,180	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	9.7	118	0.8
Rank	13	2	57
Public scheme			
Type	No. shared bikes	Electrification rate	Pricing Info
Docked	5,430	21%	Unlimited 120 min free / 4.5/9/36€ / day/week/year
Private scheme(s)			
Type	No. shared bikes	Electrification rate	Pricing Info
Hybrid	10,750	100%	1€ unlock + 0.25-0.29 / min, day/week passes



PARIS

City context

Paris Commune with its 2.1 Million inhabitants lies in the centre of the Paris Metropolitan region of 11.3 Million inhabitants. With more than 20,000 inhabitants / km², it is one of the densest urban agglomerations in Europe.

Bike Sharing has a long tradition in Paris. Since 2007 the Velib system has been offering its service to Parisians and visitors, today complemented by more than 20,000 privately operated, dockless e-bikes.

Observations from the report

1. Paris ranks #1 for the headline indicator "daily trips per 1000 inhabitants".
2. Despite more than doubling the shared bike fleet size in the last 2 years, Paris continues to achieve a top 10 position (#5) in the utilisation indicator "rides per bike per day".

Discussion points

The group were interested to understand whether the Paris e-scooter ban had any impact on the utilisation rate of the shared bikes. However, it was observed that with the removal of e-scooters, replacing them with shared bikes (more than doubling the shared bike fleet), there was no real impact on rider utilisation of the Velib scheme. This indicated a strong and consistent demand for shared bikes by the public - "if you build it they will come".

It was also believed that the introduction of the Veligo bike subscription scheme, designed for long-term use, had a positive impact given its appeal to different demographics, such as female riders, who seem to use the bike subscription scheme more often compared to Velib.

Recommendations to City of Paris / Île de France Mobilité

- Continue to increase the public bike fleet size as there is consistent growing demand
- Continue to improve cycling infrastructure, such as segregated cycle lanes
- Compared to the dockless bike share bikes, it is a laborious process to hire a Velib, they should look at making the App processes much easier and more user friendly, for example by introducing 'Apple Pay' and other similar payment methods in the Velib App.

City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
4,254,689	4	37,900	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	36.9	89.1	4.1
Rank	1	7	5
Public scheme			
Type	No. shared bikes	Electrification rate	Pricing Info
Docked	17,300	40%	∞ free 45/60 min (e-bike/pedal bikes) €9.30 / month
Private scheme(s)			
Type	No. shared bikes	Electrification rate	Pricing Info
Free-floating	20,600	100%	€1 unlock + €0.25/min



TALLINN



Tallinn



City context

Estonia’s capital doesn’t have a long-term bike share history. After an unsuccessful attempt of a private investor to bring bike share to Tallinn in 2019, in 2021, a fleet of 100 e-bikes have been launched by a private operator. The city is the first EU capital that offers free public transport since 2013.

Observations from the report

The private bike operator in Tallinn more than doubled the size of their fleet in 2023, growing bikes / 10k inhabitants 130%.

Discussion points

The group was very astonished with the low ridership of the system (0.1 per bike per day) while they have a strong density indicator with 7.8 Bikes per 10k inhabitants. They have a fully electric fleet in free floating mode available throughout the city. The low level of adoption could be explained by the fact that it’s a new system and the adoption process is not immediate. Also, our group noted that the current pricing is not inclusive hence generating a barrier for potential new customers, especially in a city that offers free public transport for everyone.

Recommendations to City of Tallinn

The group established a list of priority items in order to double the ridership in the City:

- Revisit the current pricing with a more affordable-inclusive approach. This might require certain subsidies to be consistent with the free public transport system.
- Develop a deeper integration with existing public transit
- Increase the service area
- Introduce pedal bike for traditional users

City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
447,414	1	350	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	0.1	7.8	0.1
Rank	89	92	91
Public scheme			
N/A			
Private scheme(s)			
Type	No. shared bikes	Electrification rate	Pricing Info
Free-floating	350	100%	Unknown per minute pricing + unlock fee (passes possible too)



TOULOUSE



Toulouse



City context

The VélôToulouse Bike share scheme was launched in 2007, and currently has 283 stations and 2,600 bicycles, spread throughout the city of Toulouse. The system is operated by an outdoor advertising company, and the service is part of an exclusive advertising contract. This company has also won the new tender in 2023. The new contract does not include advertising. In 2025, the network will be extended to a dozen communes in the inner suburbs of Toulouse. It will have 475 stations and 3,825 bicycles, and could grow to 4,500 bicycles over time. Half of the fleet will be electrically assisted bicycles.

VélôToulouse will become the second largest scheme in France after Paris. Tisséo Collectivités is the organising mobility authority in its area, and as part of its mobility strategy, Tisseo wants to develop the use of bicycles, in particular by developing the cycle network and defining a bicycle parking policy.

City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
493,465	1	2,600	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	19.8	52.7	3.8
Rank	5	17	7
Public scheme			
Type	No. shared bikes	Electrification rate	Pricing Info
Docked	2,600	0%	€10/month, free 1st 30 mins, 50c for each 30 mins thereafter
Private scheme(s)			
N/A			

Observations from the report

Toulouse is amongst the top 10 performing cities regarding headline indicator “trips / 1,000 inhabitants” but with a lower value for bikes per 10k inhabitants.

Discussion points

According to the round table, Toulouse is already doing things right. The new bikeshare contract will allow an extension of the service area to surrounding municipalities. A public long-term rental system of almost 1,000 bikes complements the service to different users. The “Maison du vélo”, one of the best ‘bike service centres’ in France, provides information and training for all types of cyclists. The participants highlighted two slightly weak points that are slowing down more adoption of public and private bicycles in Toulouse: cycling infrastructure and parking.

Recommendations to City of Toulouse

The participants made the following recommendations:

- Improve and develop new parking and cycling infrastructure. Cycling lanes definitely need more attention from the Authorities in Toulouse. The current network is undersized compared to usage. However we understand that this is part of the Tisseo bike development plan, which was not reviewed in detail.
- Gradually increase the proportion of e-bikes in the new bike-share system, to avoid a ‘user battle’ over e-bikes. It has been proven that e-bikes increase the number of bike-share users and that users prefer to hire an e-bike rather than a pedal bike.
- Develop mobility hubs to combine shared bikes, public transport and active travel in spaces designed to improve the use of public domain for all.
- Increase parking charges for vehicles (or certain vehicles) to encourage active mobility

TURKU

City context

Turku, a city with a population of over 190,000 inhabitants, launched its Föli bike-sharing system in 2023. The system is integrated with the city's public transportation network, Föli. Costs to operate the bike-sharing scheme are covered by user fees and municipal funding. The fleet consists of pedal bikes, no e-bikes.

Observations from the report

The city's bike scheme powered the growth in "daily trips / 1,000 inhabitants" to a level 81% higher than in 2022. (#4 in "most improved cities" YoY).

Discussion points

Round table participants analysed the bike share program's data, noting the initial low usage but also the significant subsequent increase in daily trips per 1,000 inhabitants. To further enhance the program's popularity and utilisation, they explored the potential benefits of incorporating e-bikes into the fleet, citing their proven track record of attracting riders and generating more frequent use.

Recommendations to City of Turku

- Enhance attractiveness: Implement pilot projects with diverse bike types (e.g., e-bikes, cargo bikes).
- Target public transport users: Promote bike share to existing transit users through targeted communication.
- Offer free or discounted rides: Provide incentives for youth (under 15) and seniors (over 65) to use bike share.
- Optimise infrastructure: Evaluate and improve bike lanes, parking, and overall cycling infrastructure.
- Expand service: Explore extending the operating hours and geographical area of the bike share program.



Turku



City Bike Share Ecosystem			
Population	No. bike share services	No. shared bikes	Transparency indicator
212,095	1	700	100%
Indicators			
	Daily trips per 1,000 inhabitants	Bikes per 10k inhabitants	Trips per bike per day
Value	4.7	33	1.4
Rank	39	36	37
Public scheme			
Type	No. shared bikes	Electrification rate	Pricing Info
Hub-based	700	0%	2€ / 60 min 9/35€ / month/season ∞ free 60min for PT users
Private scheme(s)			
N/A			

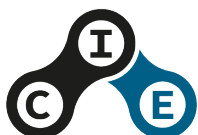




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