



Bike Sharing, Five Generations Later: What's next?

Rio de Janeiro 12/06/2018

A world map with a dark blue background. The United States is highlighted in light blue. In Europe, several countries are highlighted in light blue: UK, DE (Germany), PL (Poland), UA (Ukraine), AT (Austria), HU (Hungary), BG (Bulgaria), and TR (Turkey). In the Balkans, MT (Montenegro) and BIH (Bosnia and Herzegovina) are also highlighted. In the Middle East, SA (Saudi Arabia) is highlighted. In South America, AW (Aruba) is highlighted. In New Zealand, NZ is highlighted. The text '4 Continents', '25 Countries', and '150 Cities' is displayed in large white font on the right side of the map.

4 Continents 25 Countries 150 Cities

- 2004 Foundation of nextbike
- 2005 Rental start in Leipzig
- 2007 Project launch in Düsseldorf
- 2008 Licenses for Austria and New Zealand
- 2009 20 cities in Germany + project launch in Switzerland
- 2010 Start of "metropolradruhr" (10 cities) + project launch in Latvia
- 2011 New projects in Poland, Cyprus and Turkey
- 2012 Flagship project in Warsaw + new in Azerbaijan
- 2013 Licenses for Dubai, Hungary, Croatia and Bulgaria
- 2014 Launch in UK, new projects in Hungary, Poland, Germany, Austria, Croatia and New Zealand
- 2015 Over 3,000 new bikes in Germany (Munich, Cologne etc.), launch of US projects in Pittsburgh & West Palm Beach and Lviv (Ukraine)
- 2016 Project launches in Milton Keynes (UK), Łódź (Poland), and Tallinn
- 2017 Project launch in Berlin, Warsaw (expansion), and Glasgow
- 2018 Las Palmas de Gran Canaria, Frankfurt, Berlin (expansion)

THE LIFE OF BIKE-SHARING

1st Generation

Witte Fietsen
Amsterdam, '60s

2nd Generation

Bycyklen
Copenhagen, '90s

3rd Generation

LE Vélo STAR
Rennes, 1998

Bicing
Barcelona, 2007

Cycle Hire
London, 2010

Citibike
New York, 2014

4th Generation

Call-a-Bike Flex
Munich, 2000

KVB-Rad
Cologne, 2015

Hamilton Bike Share
Hamilton (CA), 2015

5th Generation

Data-driven bike share
Shanghai & Beijing, 2016

3RD GENERATION: DOCK-BASED AND ADVERTISEMENT-DRIVEN



Veturilo, Warsaw, Poland

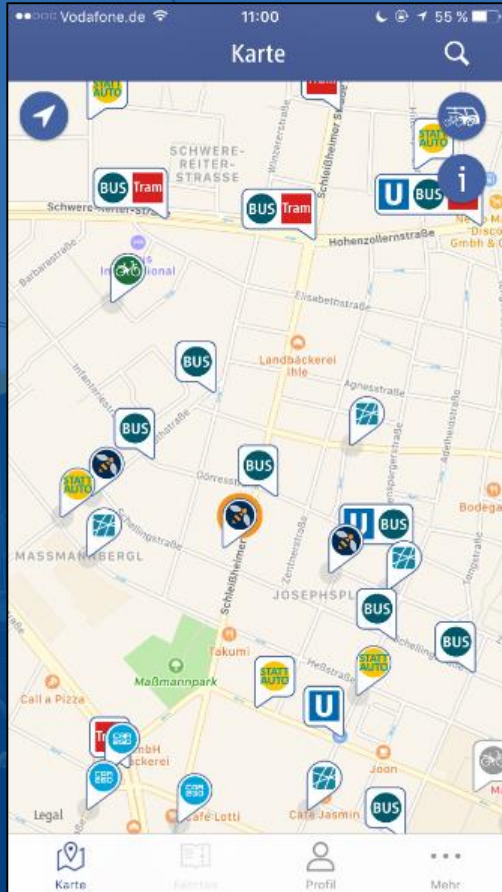


Jenson Button, Formula One driver (MK Santander Cycles)

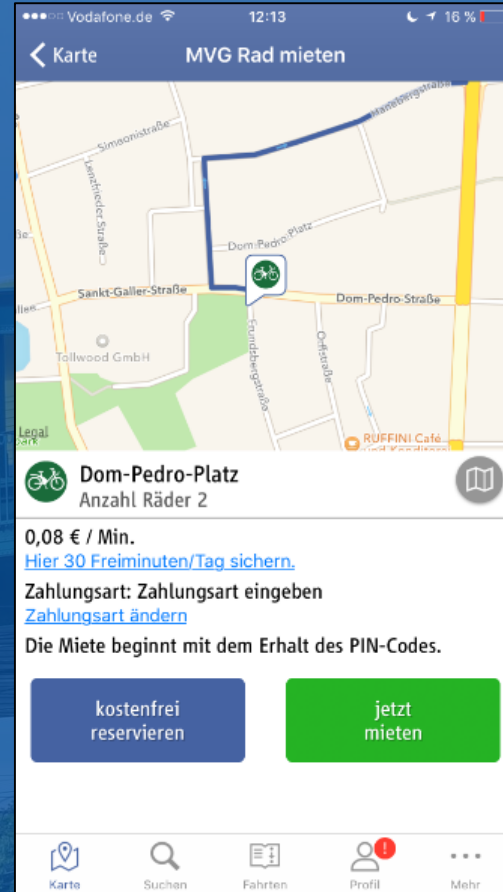
4TH GENERATION: SMART-BIKES AND FIRST PUBLIC TRANSPORT INTEGRATION



Berlin Mobility Smart Card



MVG More, Munich



MVG More, Munich



KVB Multimodal, Cologne

5TH GENERATION: THE ERA OF *BIG DATA*



A NEW SCENARIO FOR DATA-DRIVEN BIKE SHARE: LATIN AMERICA

Data-driven

Mexico City

São Paulo

Santiago de Chile

Station-based

Ecobici (Mexico City)

BKT (Guadalajara)

Encicla (Medellín)

Tembici (Rio, São Paulo...)

Mi Bici Tu Bici (Rosario)

Ecobici (Buenos Aires)

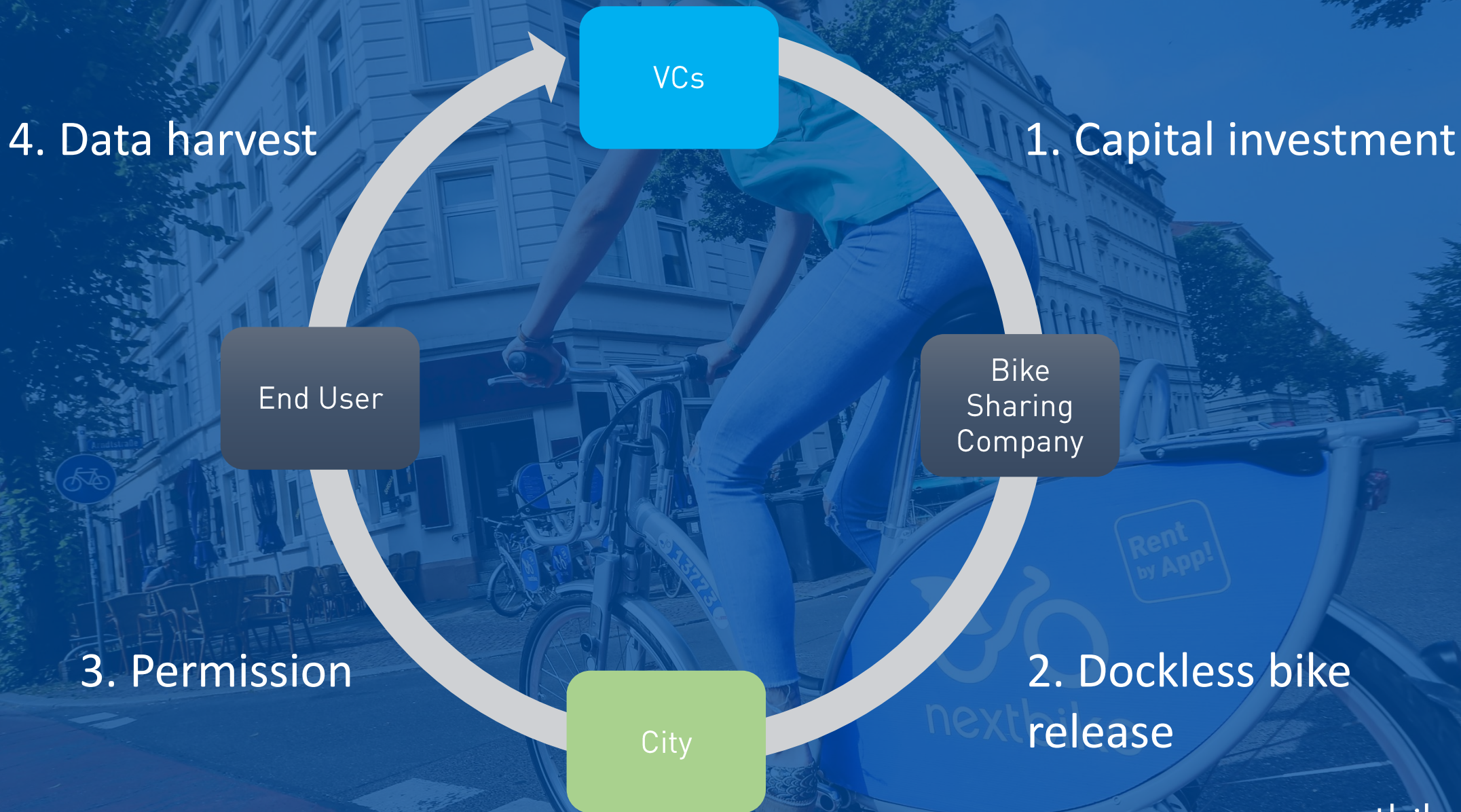
Bike Santiago (Santiago de Chile)



BUSINESS MODEL FOR 'TRADITIONAL' BIKE SHARING



5TH GENERATION: A NEW BUSINESS MODEL



PUBLIC PROCUREMENT IS NOT DEAD: PUBLIC BIDS IN EUROPE IN 2017

Hamburg

Glasgow

Leiden

Nijmegen

Luxemburg

Barcelona

Las Palmas de Gran
Canaria

Turku

Stockholm

Stuttgart

Bratislava

Bologna

Bari



THE NEXT FIVE YEARS OF BIKE SHARE

Bike share infrastructure

- Move towards a cost-efficient solution for dockless e-bikes
- End of automatised bike sharing stations
- Bike sharing mutation into a tech industry

Mobility-as-a-Service

- Integrated mobility solutions in one platform
- Change ‚clients‘ for ‚followers‘ in the future smart-cities
- Bike-share to become key driver in motor-free cities

Socio-economic challenges

- Data gathering issue – *data for bike sharing, not bike sharing for data*
- Reduce stigma of „elite“ bike sharing
- Revisit of uncontrolled dockless bike impact on urban fabric



Danke schön!

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nextbike