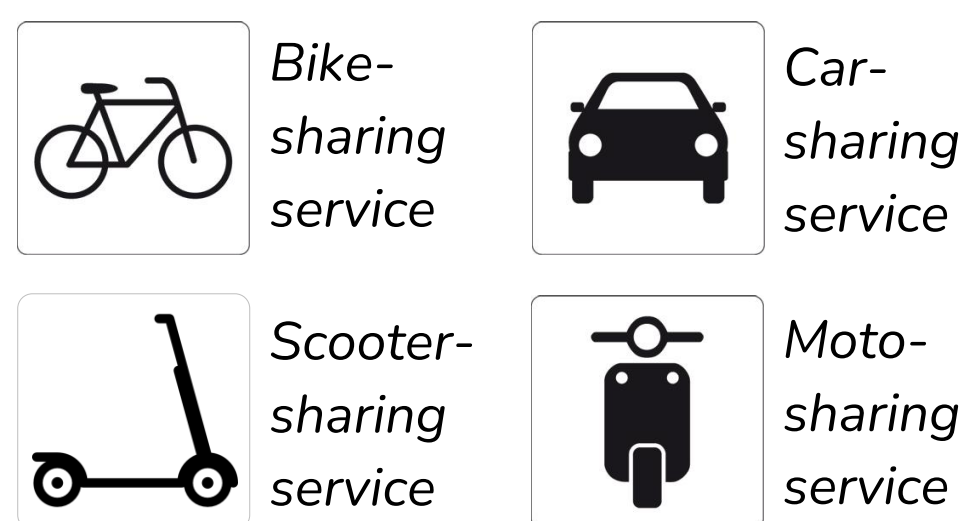


An analysis of the offer in Paris, Madrid and Hamburg metropolitan regions

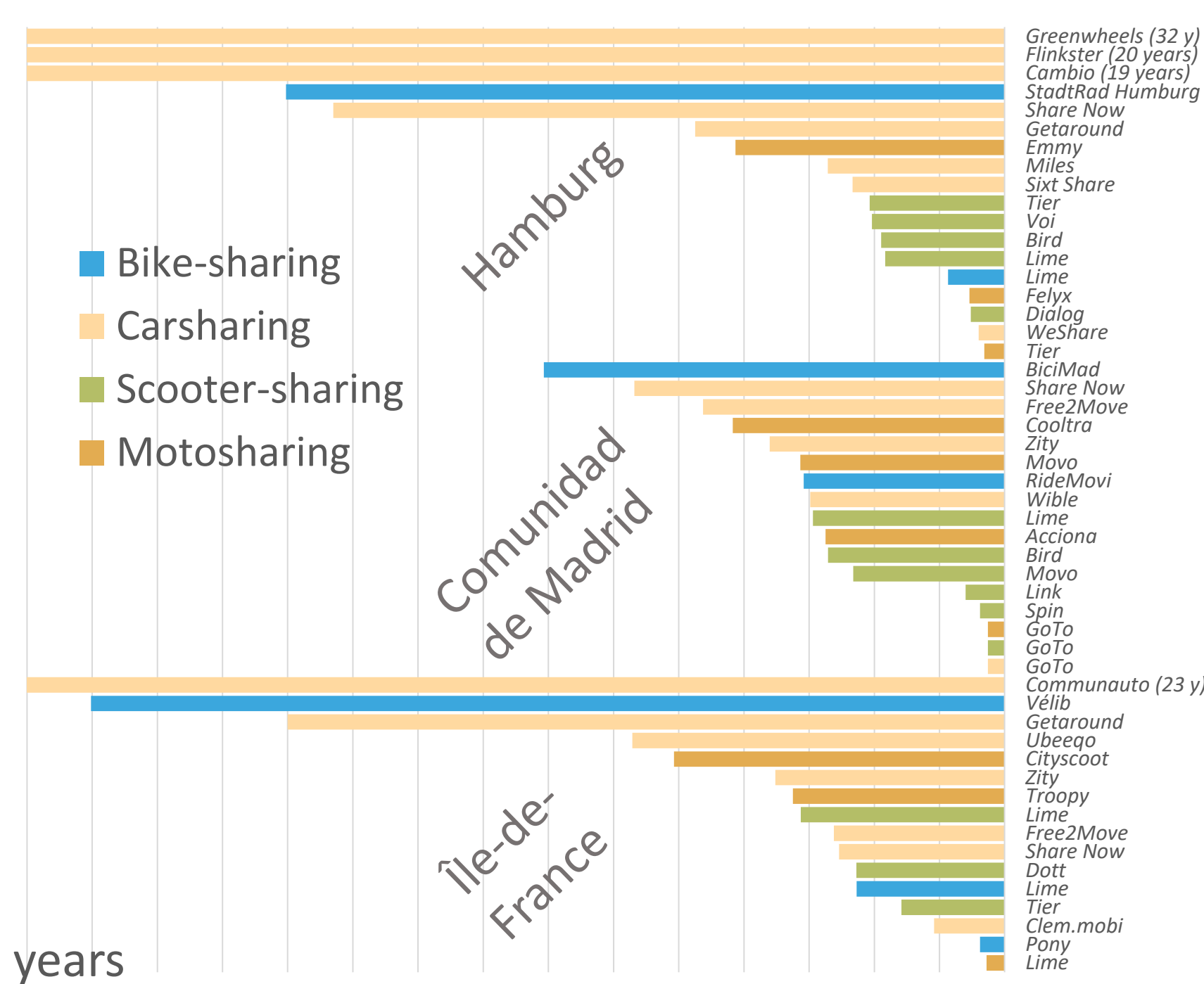
	Population (m)	Area (sq. km)	Services surveyed
Île-de-France	12.2	12,000	16
C. de Madrid	6.5	8,000	17
Hamburg	1.7	750	18

POSTER SESSION
Timothée Mangeart, Virginie Boutueil
Keeping Up with the Development of Vehicle-Sharing Services



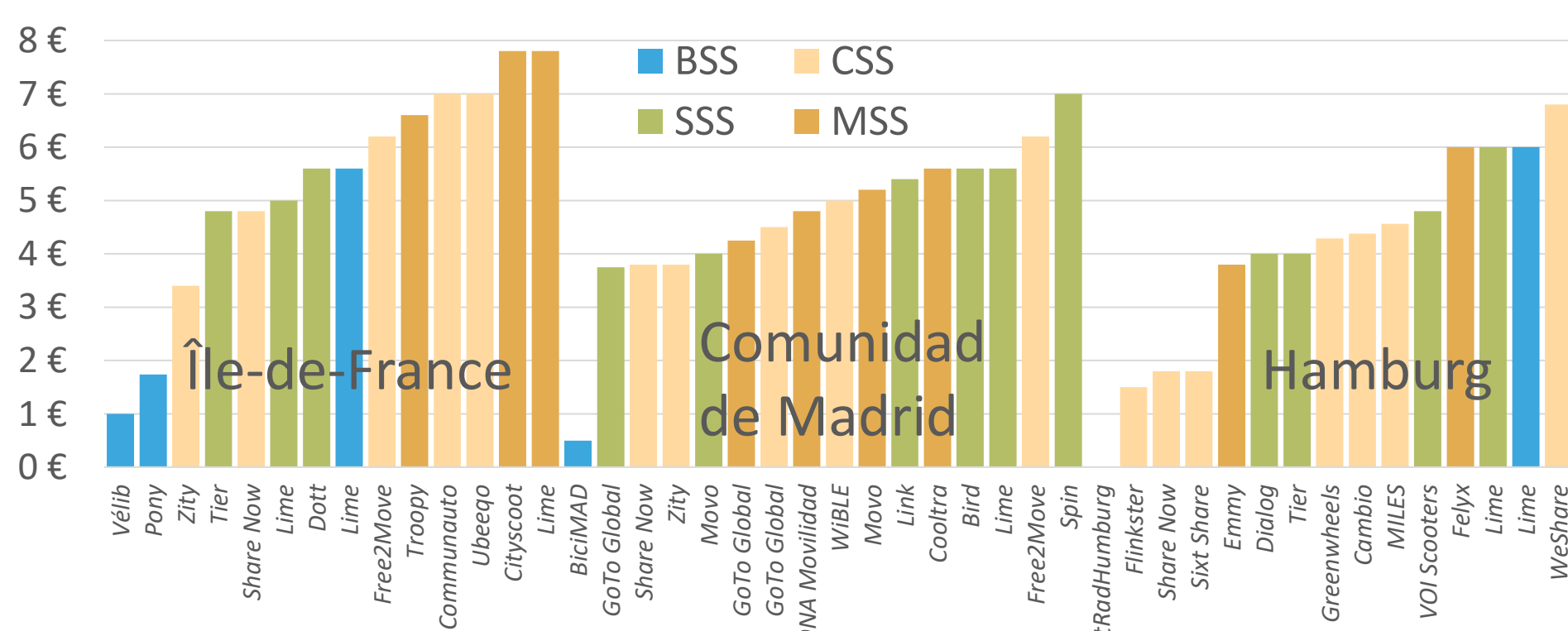
Vehicle-sharing service =
 (1) user-driver
 + (2) driver not paid
 + (3) short-term
 + (4) on-demand

New services come by waves



Age of the 51 services surveyed

Between €3.5 and €8 for a 20-minute ride for most services

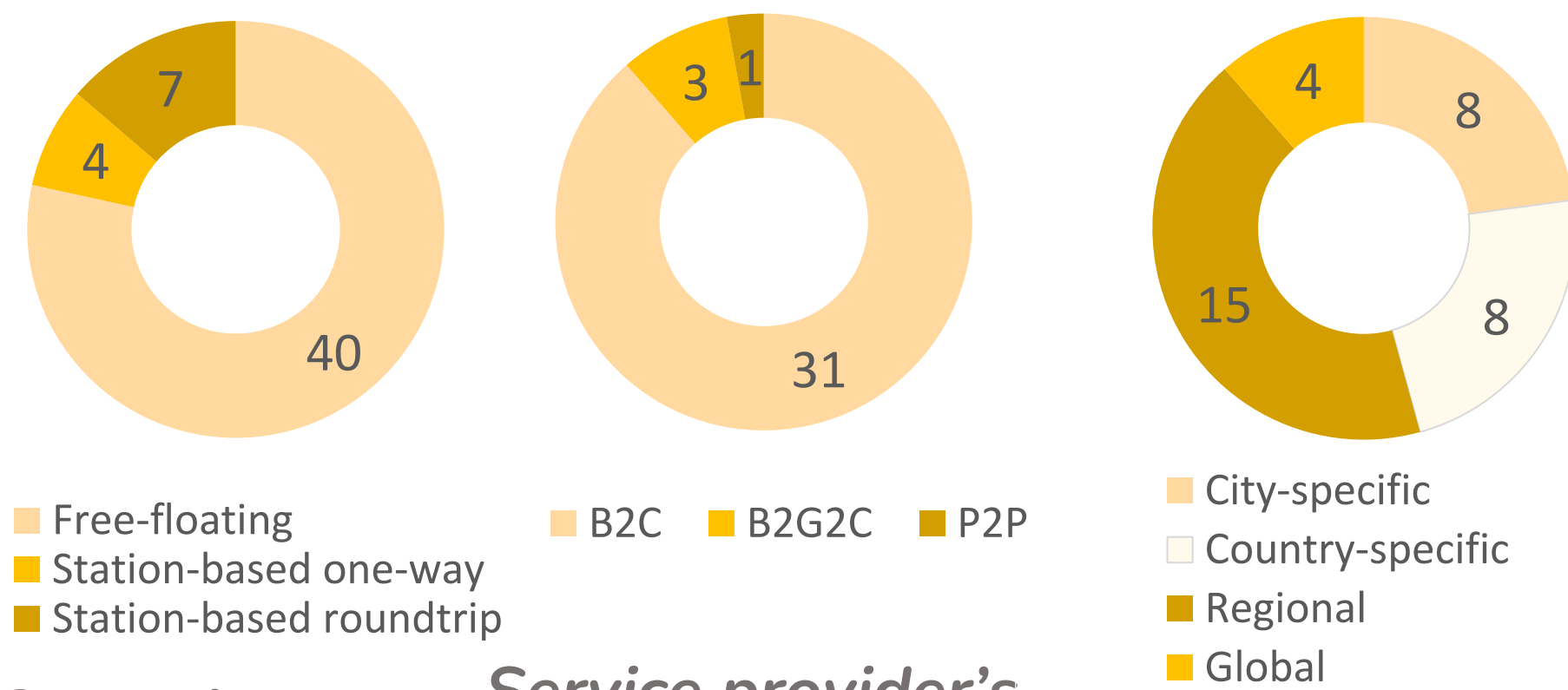


Price of a 20-minute trip for 45 services surveyed

Regulation

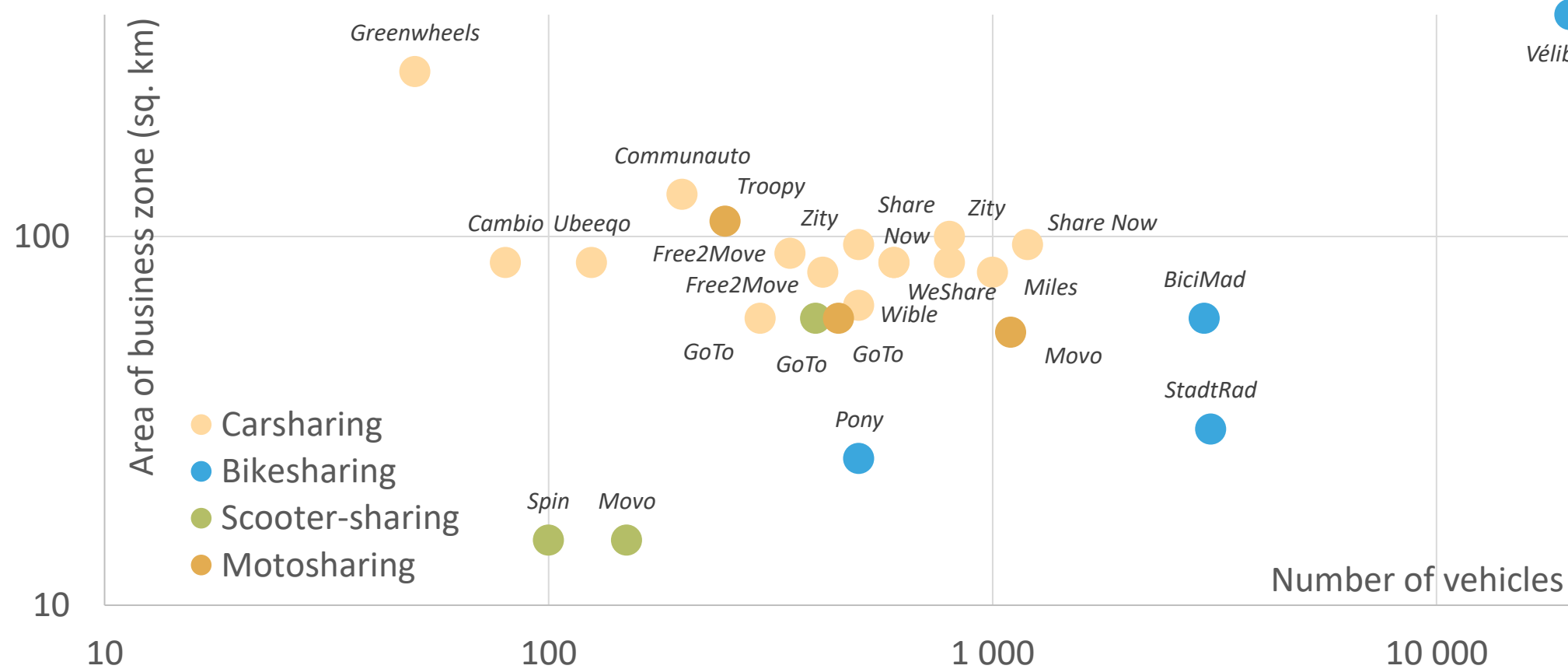
As of June 2021, authorizations for operation were mandatory only for SSS in Paris and for BSS and SSS in Madrid. They were associated with fleet caps (limited number of vehicles for each service provider) for SSS in Paris and for BSS in Madrid but not for SSS in Madrid. In Hamburg, SSS had voluntary fleet caps. Paris is the only one of the three studied cities to collect yearly fees; it does so on all VSS. In Paris, BSS, SSS and MSS providers were invited to sign a charter (for SSS, this comes on top of the authorization for operation), while CSS had to obtain a label delivered by the regional transport authority. Hamburg and Paris offer dedicated parking spaces to some CSS providers

Co-existing market and operation models



Operation models ...market models ...global footprints

Business zones and fleets



Area of the business zones and size of the fleets for 25 services surveyed (log scales)

> 3 distinct types of vehicle-sharing services

Based on the data collected, it is possible to identify 3 main groups of services with shared characteristics :

- "Public bikesharing services" are B2G2C 1-way station-based BSS. They are among the oldest VSS of their cities, have large business zones and fleets, and are cheap.
- "Private free-floating services" are B2C free-floating e-VSS. They are the most recent services and generally have small business zones. They are expensive.
- "Rental-inspired carsharing" are B2C roundtrip station-based ICE or e-CSS with small fleets and large business zones. Many of them are old services, but new ones have been started too.