Deloitte.

Shared mobility in Poland
Overview

May 2019

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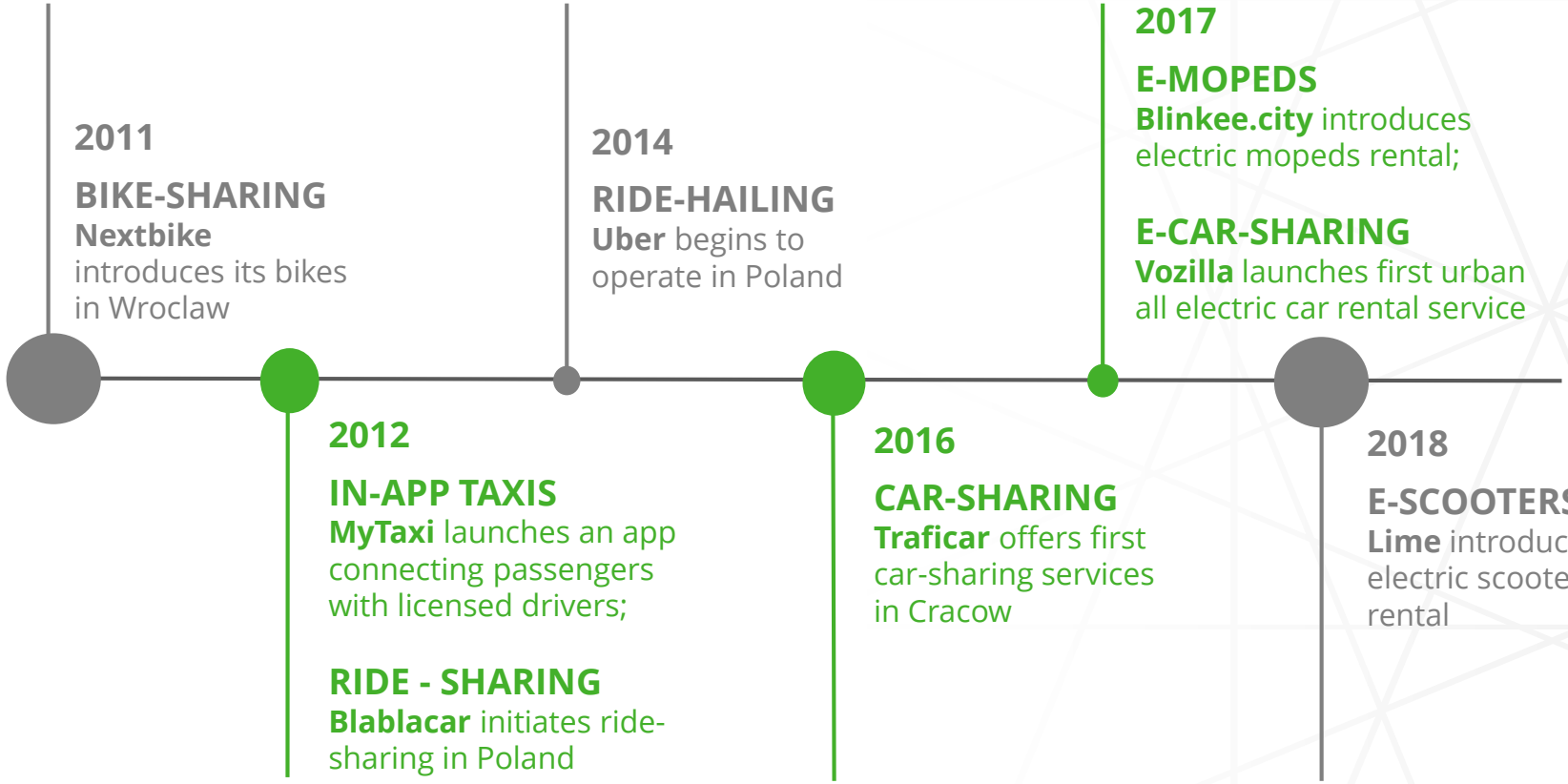
Shared mobility evolution

The history of shared mobility in Poland

Due to advancing digital development and **the shift from owing assets to the sharing economy**, more and more Poles change the way in which they move and perform their everyday tasks. Transferring trade to digital channels, increased use of online/mobile platforms changed the Polish mobility system**.**

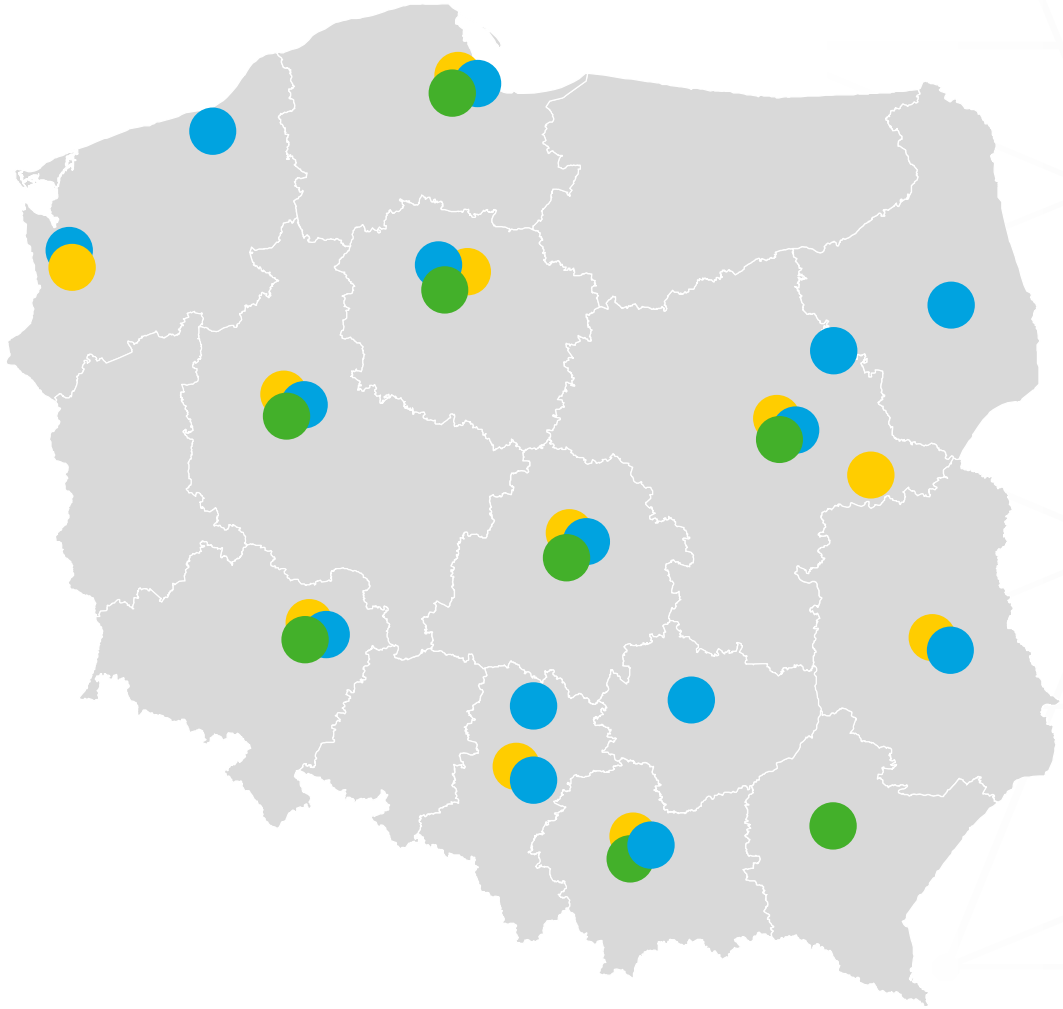
The pioneer creating the first form of MaaS in Poland was **Nextbike** - in 2011 the company introduced its self-service urban bike rentals in Wroclaw.



New shared mobility products and services - concentration

For the majority of shared mobility services' providers, it may be not profitable to expand their offer to villages or suburban areas where the distance is too big to address the first/last mile problem and people usually have their own cars.

- Car-sharing
- Electric mopeds
- Electric scooters

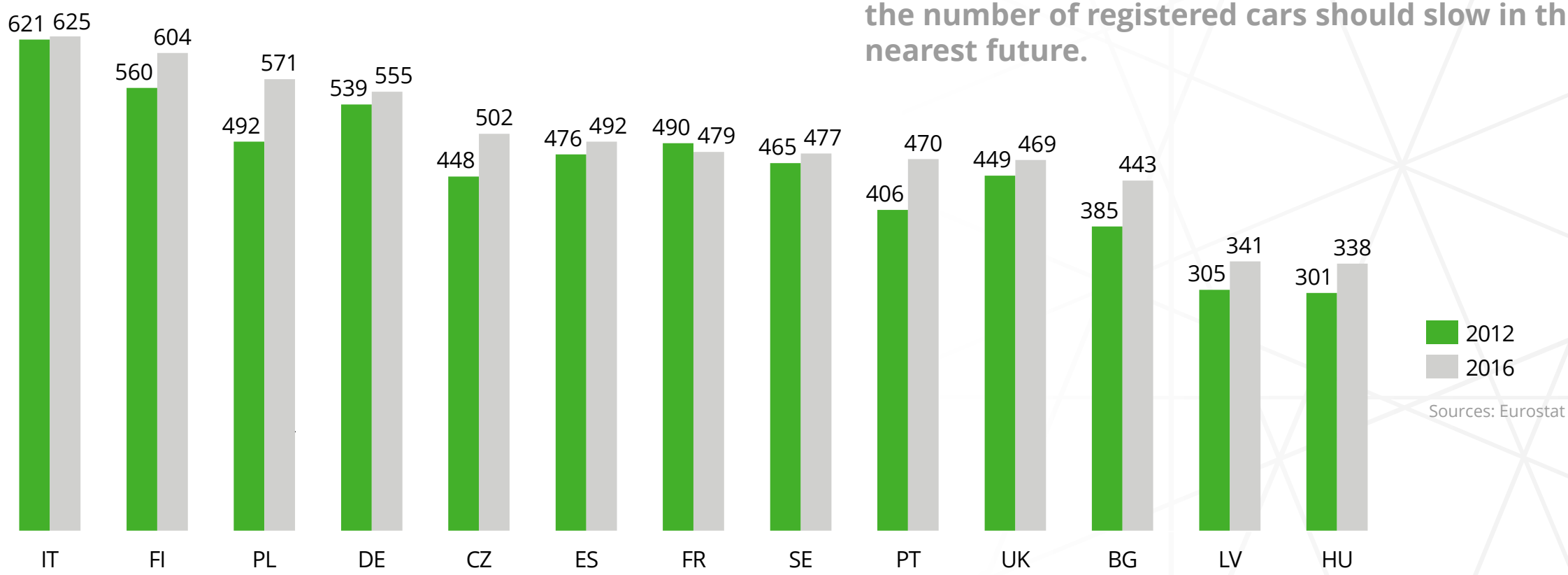


As the population is increasingly city-based, the **mobility service providers concentrate their operations in bigger urban agglomerations**.

Passenger cars per 1000 habitants across Europe

The number of cars per 1000 habitants in Poland is relatively high. Also its year-by-year increase is greater than in the majority of European countries.

Due to the high level of congestion in Polish cities and the rise of alternative methods of commuting, **the number of registered cars should slow in the nearest future.**

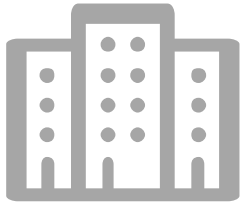


Sources: Eurostat

Reducing reliance on private cars – drivers of change

Technology as an enabler

Advances in GPS tracking, connectivity, in-app mobile payments, battery longevity and growing ubiquity of smartphones encourage Polish citizens to try alternative modes of daily transportation.



Urbanisation

The current level of urbanisation in Poland is 60% and it is expected to climb further in the future. Consequently, the need of moving more residents through existing transportation networks is becoming more pressing.

First/last mile problem

While mass transit remains the one of the most efficient means of moving large number of people for long distances, getting people to and from transit still remains a challenge.

Poor air quality

Need of reducing carbon dioxide emissions in Polish cities is critical. As Poland has the most polluted cities in Europe, compliance with EU emissions requirements remains a perennial difficulty.

Mobility options in Polish cities

City	Available options
Warsaw	• 715 passenger cars per 1000 habitants • Car sharing: Panek, CityBee, Traficar, 4Mobility, Innogy GO! • Electric mopeds: Scroot, Hop.City, Blinkee.city • Electric scooters: Lime, Hive, Bird, CityBee, Blinkee.city • Bikes: Nextbike (Verturilo), Acro Bike
Katowice	• 704 passenger cars per 1000 habitants • Car sharing: Traficar, GreenGo, eCAR by Tauron • Electric mopeds: Hop.City • Bikes: Nextbike (City by bike)
Poznań	• 690 passenger cars per 1000 habitants • Car sharing: Traficar, 4Mobility, EasyShare, Click2Go • Electric mopeds: Blinkee.city, Hop.City, EcoShare • Electric scooters: Lime, Blinkee.city • Bikes: Nextbike (Poznański Rower Miejski)
Wrocław	• 659 passenger cars per 1000 habitants • Car sharing: Traficar, Vozilla • Electric mopeds: GoScooter, Blinkee.city • Electric scooters: Lime, Hive • Bikes: Nextbike (Wroclawski Rower Miejski)

The need of reducing car dependence, congestion and gas emissions press Polish cities to embrace new transportation modes.

Sources: GUS, Bank Danych Lokalnych

Mobility options in Polish cities

City	Available options
Tricity	• 637 passenger cars per 1000 habitants • Car sharing: Traficar, MiiMove • Electric mopeds: Blinkee.city, Hop.City, Yumi.eco, EcoShare • Electric scooters: Blinkee.city, Quick Ride • Bikes: Nextbike (Mevo)
Cracow	• 611 passenger cars per 1000 habitants • Car sharing: Traficar • Electric mopeds: Blinkee.city • Electric scooters: Hulaj, Blinkee.city • Bikes: BikeU (Wavelo)
Bydgoszcz	• 569 passenger cars per 1000 habitants • Car sharing: Traficar • Electric mopeds: Blinkee.city • Electric scooters: Blinkee.city • Bikes: Nextbike (Bydgoski Rower Aglomeracyjny)
Łódź	• 551 passenger cars per 1000 habitants • Car sharing: Traficar, EasyShare • Electric scooters: Volt Scooters
Lublin	• 531 passenger cars per 1000 habitants • Car sharing: Traficar, Panek • Electric mopeds: Blinkee.city • Bikes: Nextbike (Lubelski Rower Miejski)

For some urban areas **congestion is a top concern**. As mobility providers try to be proactive in addressing cities problems, their fleet has been developed in areas that seeks the transportation alternatives the most.

Sources: GUS, Bank Danych Lokalnych

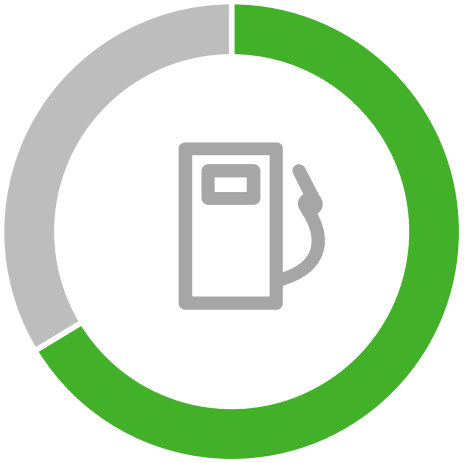
Bike-sharing

Bike sharing – the shift towards bikes

Why do we need a change?

Low level of physical activity

Only 31% of Polish citizens (aged 15-69) meet the WHO standards concerning recommended level of physical activity.



3rd most polluted country in EU

Due to the WHO study, 33 out of 50 (nearly 67%) most polluted European cities are in Poland. The pressure to develop clean methods of commuting and reduce greenhouse gases emissions is growing.

High level of congestion

High level of congestion in Polish cities highlights the need of finding the alternative to cars and reducing the traffic in urban areas.

Sources: *Poziom aktywności fizycznej Polaków 2018* - MSiT's Report, WHO Global Urban Ambient Air Pollution Database 2016, TOMTOM traffic index, Eurostat Database

Bike sharing – biggest players characteristics

Bike rental system	Key characteristics
Next Bike	• Self-service, **docked bike-sharing** system with about **16,6k vehicles** • Operating in Poland since 2011 (started in Wroclaw) • Systems available in **44 biggest urban areas** under the name of „Rower Miejski + the name of the city of operations" • The biggest Nextbike (and the biggest in Poland) system developed **in Warsaw known as Verturilo** (380 stations and more than 5500 bicycles) • In commercial collaboration with ORLEN, City Handlowy, VISA and Benefit systems
BikeU	• **Docked bike-sharing** system • Operating in Poland since 2014 • Available in **7 cities** under the names: Bike_S (Szczecin), Bbike (Bielsko-Biała), BRA (Bydgoszcz), Wavelo (Kraków), Polski Rower (Jastrzębie- Zdrój), ŁoKeR (Łomża), Zgierski Rower Miejski (Zgierz) • The biggest BikeU system developed **in Cracow known as Wavelo** (165 stations and 1500 bicycles)
GeoVelo	• **No rental stands** • Operating in Poland since 2018 • Available in **5 cities**
Roovee	• **No rental stands** • Operating in **7 cities**
Romet Rental System	• Bikes/scooters manufacturer and bikes rental operator (**docked bike-sharing**) • Operating **in 2 cities** – Toruń and Rzeszów • Easiness of fleet expanding due to broad manufacturing experience
Acro	• **Station-less shared bike system** • Operating **in Warsaw** since 2017 • Growing competitor for well-established Nextbike due to its innovativeness and convenience of parking at any eligible bike stand

Bike sharing – prices comparison

Depending on the character of the city, the customers' needs and habits, bike rental service providers use different pricing strategies. The most common and **the most cost-effective pricing type for those who ride occasionally is pay-as-you-go payment plan**.

System operator	Average initiation fee/deposit[1]	Average fee for 1 hour[2]	Average fee for 3 hours[2]
Next Bike	12 PLN	1,4 PLN	8,6 PLN
BikeU	14,8 PLN	1,25 PLN	8,8 PLN
Roovee	10 PLN	1,5 PLN	7,5 PLN
GeoVelo	10 PLN	3 PLN	9 PLN
Romet Rental System	19 PLN	0,5 PLN	3,5 PLN
Acro	99 PLN	1 PLN	6 PLN

Some operators introduced payment plans based on daily/weekly/monthly subscription.

System operator	Local brand	Initiation fee	Fee for monthly subscription (90 min per day)	Fee per minute after free time
Next Bike	Mevo	10 PLN	10 PLN	0,05 PLN
BikeU	Wavelo Krakow City Bike	0 PLN	25 PLN	0,05 PLN
Roovee	ORM by Roovee	10 PLN	10 PLN	0,05 PLN

Note: As Nextbike and BikeU apply diverse fees for different cities of operations, the fees shown in the table are calculated as an average. The sample for Nextbike included Koszaliński RM, Łódzki RP, Wrocławski RM, Verturilo and Zielonogórski RM. The sample for BikeU included ŁoKer, Bike_S, Bbike and BRA. Roovee prices was based on its pricing for ORM by Roovee.

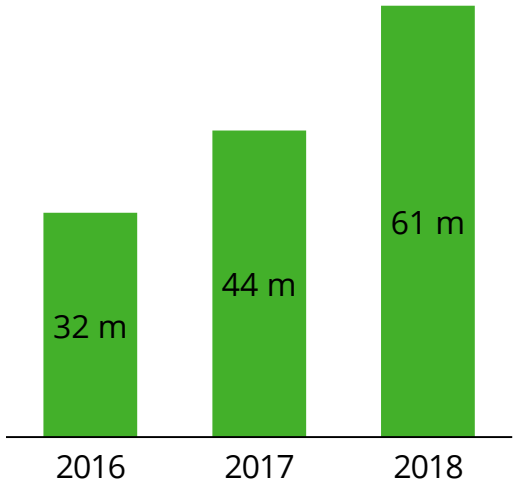
(1) Nextbike, BikeU and Romet Rental Systems apply initiation fees, Acro Bike applies the deposit instead which can be refundable at any time

(2) Without the initiation fee

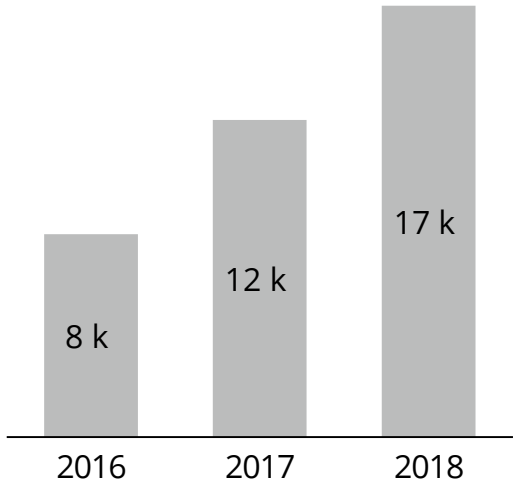
Bike sharing – business model

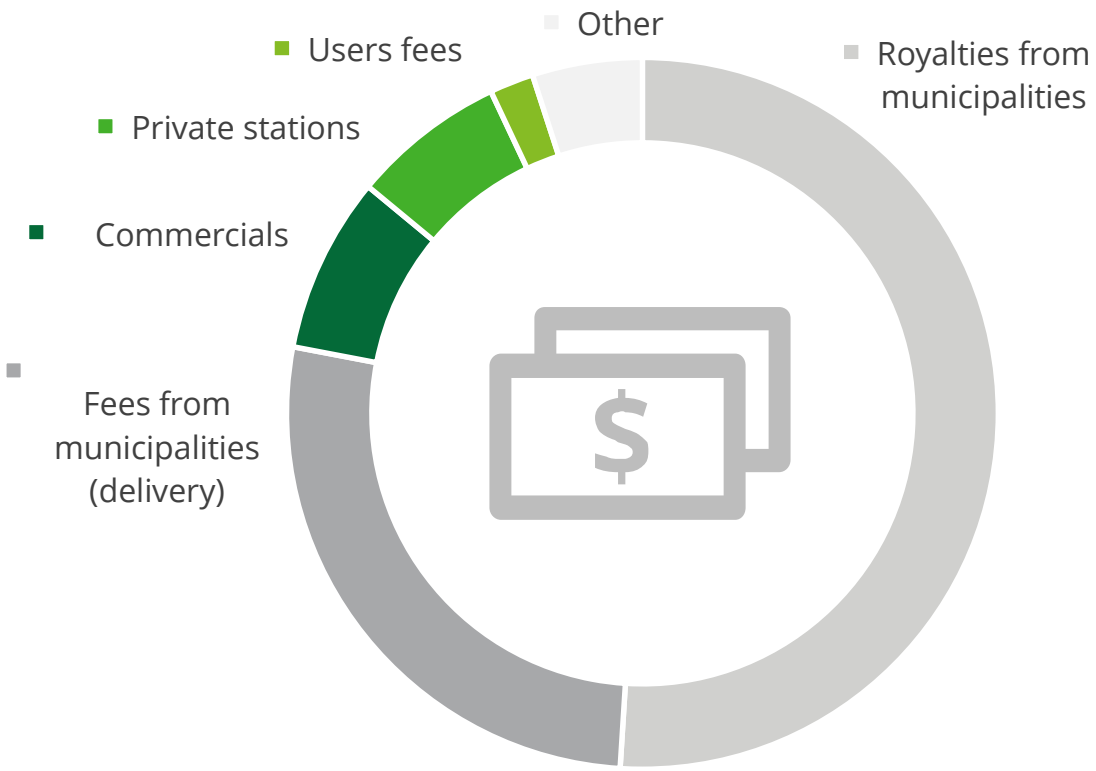
Although fees for rental are very low, operators of city bikes' systems increase quickly their incomes. For example, Nextbike's revenues for 2018 grew by 41% from 2017. Thanks to its business model based on the commercial partnerships and the collaboration with municipalities, the income from fees represents a small percentage of its overall revenues.

Nextbike's incomes (Polish złoty)



The number of Nextbike's bikes





70% of Nextbike revenues for 2018 came from municipalities.

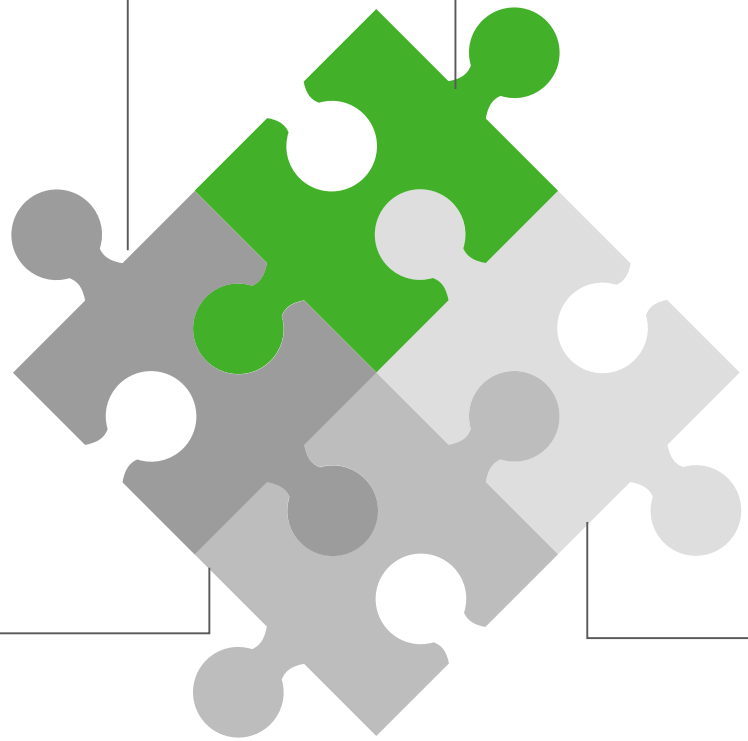
Source: Nextbike annual report for 2018

New entrants – dockless bike-share / electric scooters

Although Nextbike and BikeU are undeniable leaders of bike rental industry in Poland, new entrants as **AcroBike** introducing dockless bike-share rise quickly in popularity. Another players which pose a threat to traditional services offering new micro-mobility experience are **Lime**, **Bird, Ride Hive and CityBee** with their quickly growing fleet of electric scooters.

Why dockless bike-share and electric scooters are taking off in popularity?

Offering **"last-mile" connections** - possibility of convenient combining modes of transport (for example scooter + tram) reducing car usage, greenhouse gases emissions and congestion



Cost-effective and easier option for short trips, **recreational aspects** of the ride

Comfort linked with the possibility of ending the ride at any place

Enabling people from the city outskirts to find convenient (sometimes even one possible non-car) connection with transit

Recently, new **local e-scooters' operators** launched their services– **Hulaj** (in Cracow) and **Blinkee.city** (6 agglomerations)

Electric scooters
Photo by Mack Fox (MusicFox) on Unsplash

Electric scooters

E-scooters' operator	Key characteristics	Price for 30 min ride
Lime	• Available in **Warsaw, Wroclaw and Poznan** • Fleet composed of **3 k electric scooters** • PRICE: initial 3 PLN + 0,5 PLN per minute • 100 k customers	18 PLN
Hive	• Available in **Warsaw and Wroclaw** • Fleet composed of **400 electric scooters** • PRICE: initial 2,5 PLN + 0,45 PLN per minute	16 PLN
Bird	• Available in **Warsaw** • Fleet composed of **100 electric scooters** • PRICE: initial 3 PLN + 0,5 PLN per minute	18 PLN
Hulaj	• Local player operating only in **Cracow** • Plans of expansion to another cities: Poznan, Wroclaw, Warsaw and Gdansk • Fleet composed of **200 electric scooters** • PRICE: initial 1 PLN + 0,49 PLN per minute	15,7 PLN
CityBee	• Available in **Warsaw** • Fleet composed of **800 electric scooters** • PRICE: initial 2,5 PLN + 0,45 PLN per minute	16 PLN

Sources: Data gathered from the websites of mentioned providers and *fintek.pl*

Electric scooters

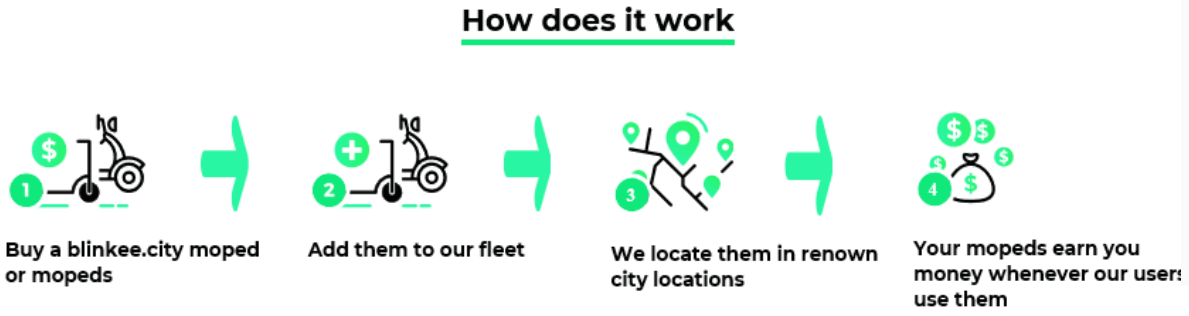
E-scooters' operator	Key characteristics	Price for 30 min ride
Blinkee.city	• Available in **6 cities** • PRICE: initial 2,5 PLN + 0,49 PLN per minute	17,2 PLN
Quick Ride	• Available in **Tricity*** • Fleet composed of **250 electric scooters** • PRICE: initial 3 PLN + 0,5 PLN per minute	18 PLN
Volt Scooters	• Available in **Łódź** • Fleet composed of **150 electric scooters** • PRICE: initial 2 PLN + 0,5 PLN per minute	17 PLN
* Quick-ride e-scooters' are expected to also be introduced in Warsaw		
Eco Go	• Available in **Częstochowa** • Fleet composed of **200 electric scooters** • Fee for the vehicle return – 3 PLN • No initial fee • No information about the price per minute	
Hop.City	• No information about the prices and the number of e-scooters	

New players are expected to enter the market in the nearest future

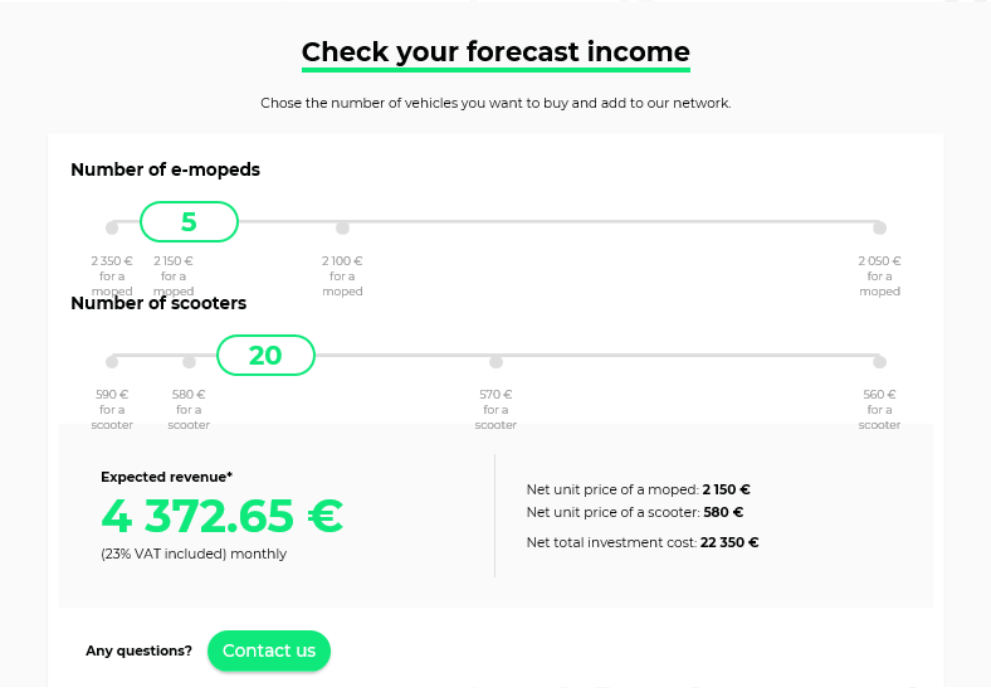
Sources: Data gathered from the websites of mentioned providers and fintek.pl, transport-publizny.pl, moto-rp.pl

Blinkee.city – different approach

Blinkee.city decided to **extend its business to additional e-scooters' service**. New vehicles were introduced in Cracow, Warsaw, Tricity, Rzeszów, Bydgoszcz and Poznań. The business strategy implemented by this operator stands out from its competitors:



Everyone can invest in developing Blinkee.city's fleet by **buying e-mopeds or/and e-scooters**.



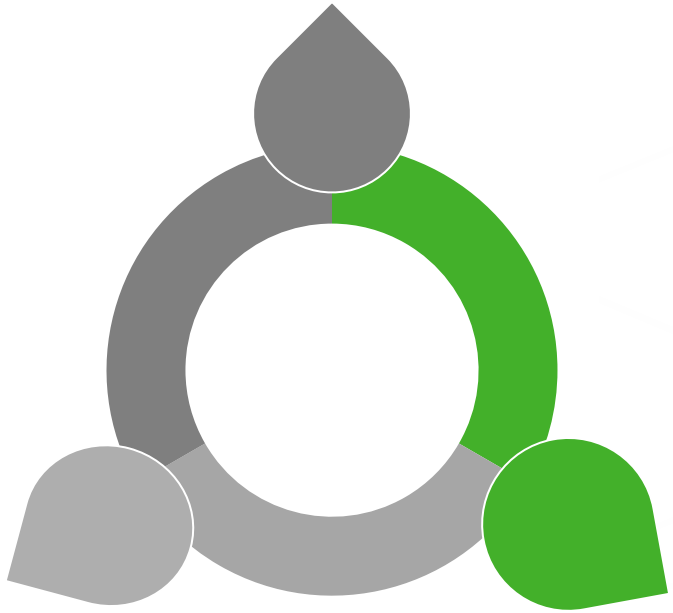
The **forecast of the future profits** earned is available on the website.

Electric scooters – (un) regulation

We wait for concrete solutions. The lack of regulation is not comfortable for us.

Marek Łusiak, Head of Lime Polska

Are the electric scooters regulated?
There is still no regulation concerning electric scooters in Poland. As a result, their users are not qualified as pedestrians nor car/bike drivers.



Source: money.pl

What is the right place for an electric scooter?
Until recently, the biggest electric scooters operator in Poland – Lime, prohibited the use of the public roads and pavements. Its statute have changed - now the user is responsible for choosing 'the right and safe way' for driving.

Are electric-scooters dangerous?
Although electric scooters are seen as comfortable for commuters, they can be dangerous for inexperienced riders (who usually do not wear a helmet or apply any measures of precaution). Also, scooters left on the public pavements can pose a threat for visually impaired pedestrians.

Electric mopeds

Photo by Jules D. on Unsplash

Electric mopeds

Electric mopeds' providers target not only individuals but also businesses using them for everyday operations.

Mopeds' operator	Key characteristics
Blinkee.city	• Launched in Poland in 2017 • The biggest player in the electric mopeds industry in Poland • Available in **10 biggest urban areas in Poland**, Spain, Hungary, Croatia and Romania • Driving licence /ID for people born before 1995 required
Hop.City	• Available in **7 cities** • Partnerships with UberEats, Pyszne.pl, Amrest • Driving licence /ID for people born before 1995 required
Scroot	• Local player operating **only in Warsaw** • In comparison to blinkee.city and JedenŚlad, payment is based not only on the ride time but also on the distance covered • Driving licence required (categories A1, A2, A and B with the rights since min. 3 years)
Go Scooter	• Local player operating **only in Wroclaw** • Fleet composed of **100 electric mopeds** • Driving licence /ID for people born before 1995 required
Yumi.eco	• Launched in Poland in 2018 • Available in **Tricity** • Driving licence cat. AM or above
EcoShare	• Launched in Poland in 2018 • Available in **Szczecin, Tricity, Poznań** • Driving licence required

Sources: Data gathered from the websites of mentioned providers; *Mobility as a Service PL,* Straal, 2018

Electric mopeds – prices comparison

Pay-as-you-go

System operator	Fee per 1 min	Fee per 1 km	Total fee (10 km/ 20 min)
Yumi.eco	0,49 PLN	-	9,8 PLN
Blinkee.city	0,69 PLN	-	13,8 PLN
GoScooter	0,69 PLN	-	13,8 PLN
Hop.City	0,69 PLN	-	13,8 PLN
EcoShare	0,69 PLN	-	13,8 PLN
Scroot	0,49 PLN	0,49 PLN	14,7 PLN

Note: Calculations are made based on the prices found on the websites of different providers

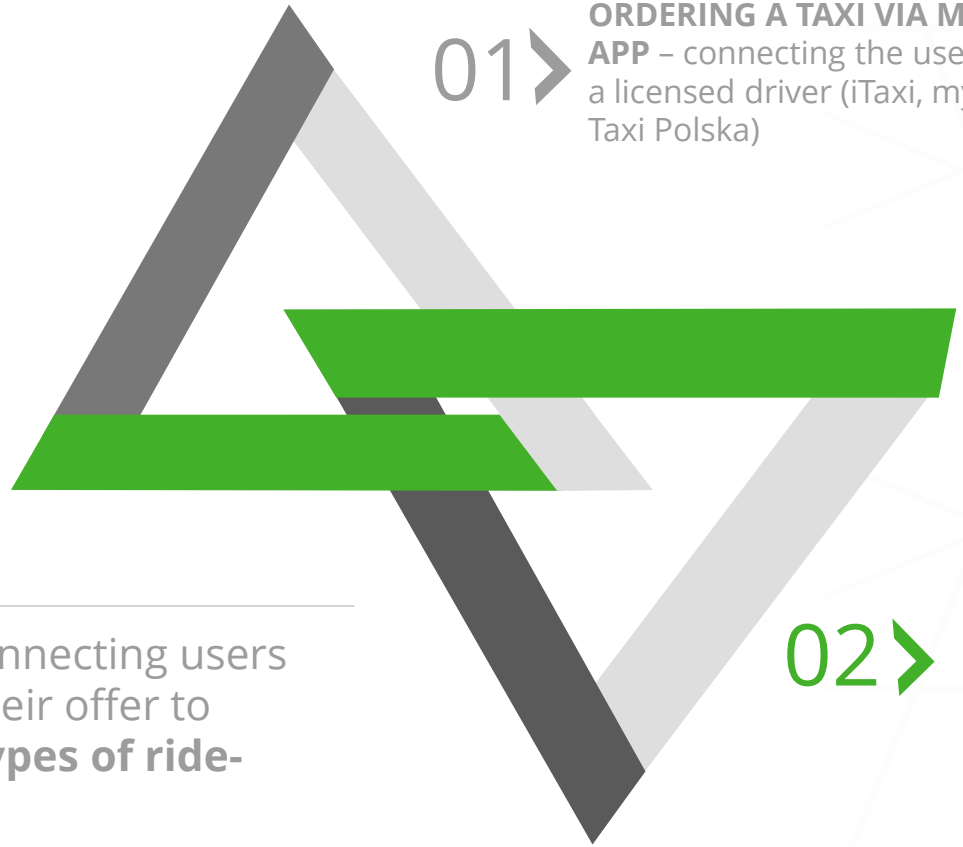
Hop.City has also developed payment systems based on monthly subscriptions.

Subscription with monthly/daily limits	Prices for the plan	Minutes available	Price for each additional minute
Monthly (*Miejski*)	59 PLN/month	100 min per month	0,39 PLN
Daily (*Codzienny*)	89 PLN/month	20 min per day	0,45 PLN

Ride-hailing

Ride-hailing in Poland – available services

There are two categories of ride-hailing services available in Poland connecting users with licensed or private non-licensed drivers.



01 **ORDERING A TAXI VIA MOBILE APP** – connecting the user with a licensed driver (iTaxi, myTaxi, Taxi Polska)

02 **ORDERING A RIDE WITH A PRIVATE DRIVER** – connecting the user with a diver who is not licensed (Uber, Bolt)

As some ride-hailing operators connecting users with the private drivers expand their offer to licensed taxis (for ex. Bolt), **two types of ride-hailing began to permeate.**

Ride-hailing operators – characteristics 1/2

Although the segment of operators connecting users with the private drivers is dominated by international providers – Uber and Taxify, in the second one matching customers with licensed taxis – local iTaxi is the leader.

Ride-hailing operator	Key characteristics
Uber	• In Poland **since 2014** • Cost calculated upfront • **Progressive pricing model** - prices vary depending on the supply-demand relation on the distance covered in a given time • Initial fee/ per-minute wait time and additional cost per mile added to each trip • There is also a minimum fare for short-trips • Prices vary depending on the category selected by the user (UberX, Uber Pool, UberXL, Uber Select or Uber Black) • Splitting the fare option available • Possibility of creating a family account • Possibility of adding multiple stops
Bolt	• In Poland **since 2016 (former Taxify)** • Cost calculated upfront • **Progressive pricing model** - prices vary depending on the supply-demand relation on the distance covered in a given time, initial cost and the overall time of the trip • Additional fee for long-distance trips (limits varies in different cities) • Prices vary depending on the category selected by the user (Bolt, Comfort, XL, Bez Barier, Taxi) • Bolt for Business – possibility creating accounts for employees

Sources: Data gathered from the websites of mentioned providers

Ride-hailing operators – characteristics 2/2

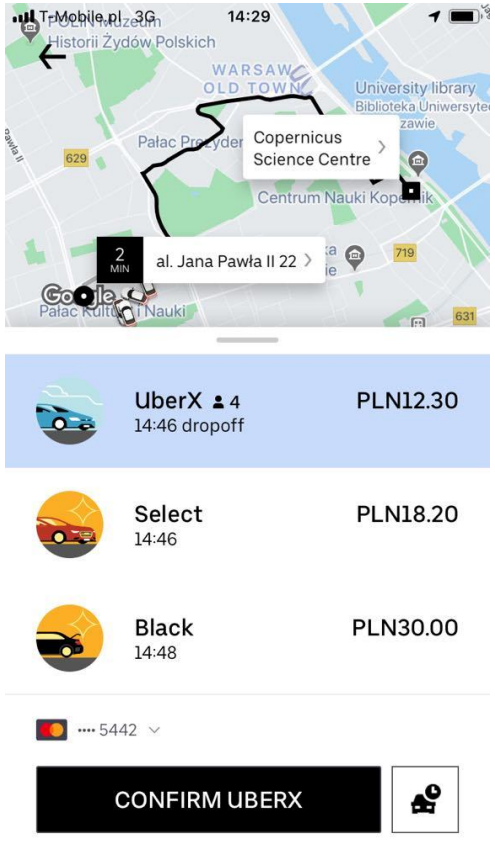
Although some companies do not allow its drivers to benefit from external solutions, **the number of licensed drivers working with ride-hailing operators is still increasing.**

Ride-hailing operator	Key characteristics
myTaxi	• Possibility of choosing the taxi category (Taxi, Lite, Plus, Match, XL and Eco) • The user can see the estimated and fixed fare for each category, estimated pickup and arrival time • iTaxi Match – **matching the clients going to the same destination for a reduced-cost** • Possibility of choosing a pet friendly car • Payment via PayPal/ credit card within the app
iTaxi	• Possibility of choosing a car category (popular/luxury) or the particular taxi (sorted by waiting time or by price) • The users see the rating, the waiting time and the price per km while choosing the driver • Lack of price estimations • Possibility of choosing a pet friendly car • The option of choosing the number of passengers with additional fee (ordering a large trunk available) • Payment via credit card within the app
TaxiSmart	• Possibility of adding the number of passengers/ luggage/ child booster seats • Possibility of ordering a pet-friendly car (for animals in/without the cage) • Option of **adding the stops** • The user sees final price for the ride • Possibility of ordering the taxi by phone

Sources: Data gathered from the mobile apps of mentioned providers

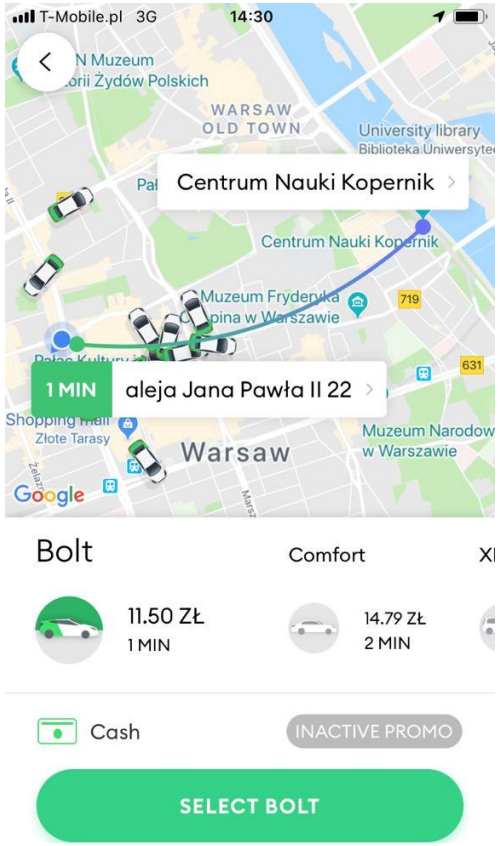
Ride-hailing operators – prices comparison 1/3 (working day prices – about 2:30 pm)

Uber



Fee: 12 PLN

Bolt

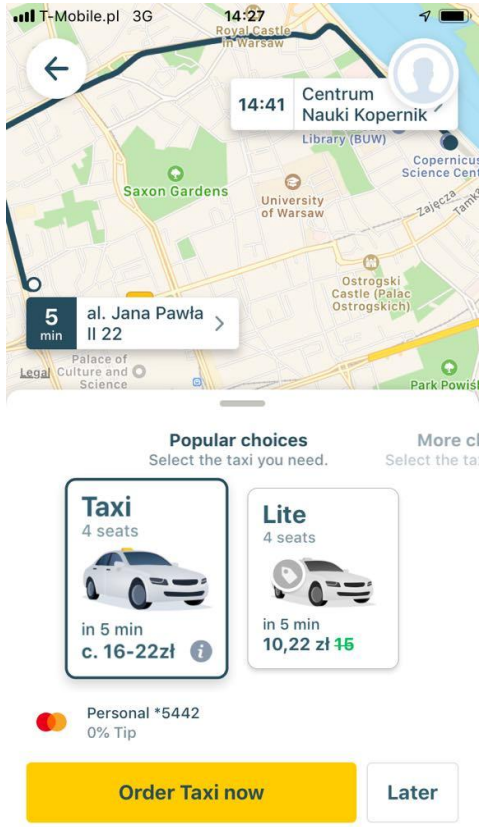


Fee: 12 PLN

TaxiSmart

Fee: 16 PLN

MyTaxi

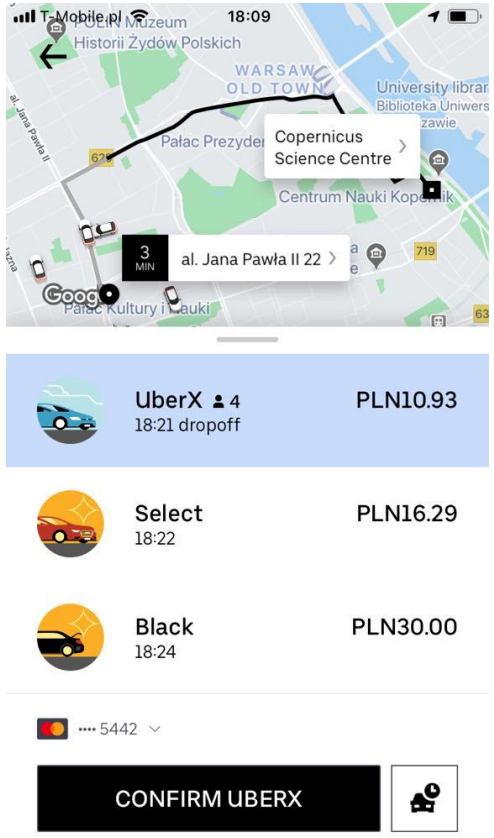


Fee: 19 PLN[1]

Note: Prices calculated for normal working-day (25.04.2019) - about 2:30 pm.
(1) Average fee calculated
Sources: Data gathered from the mobile apps of mentioned providers

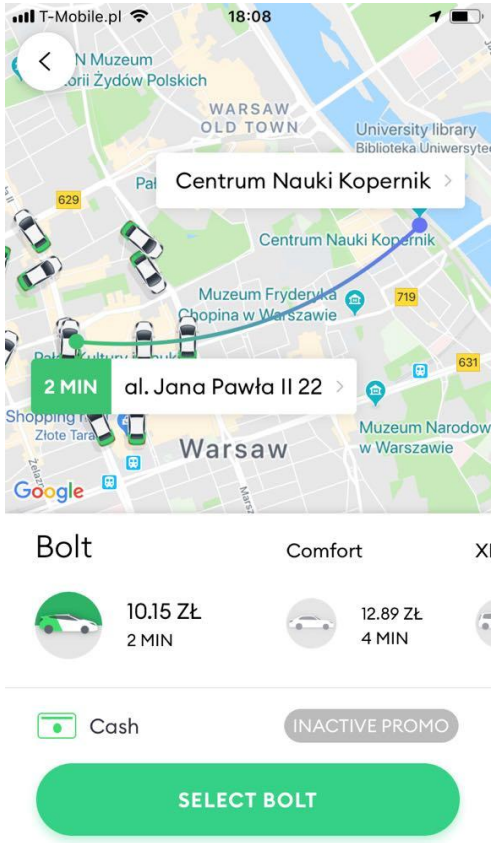
Ride-hailing operators – prices comparison 2/3 (weekend prices - about 6 pm)

Uber



Fee: 11 PLN

Bolt

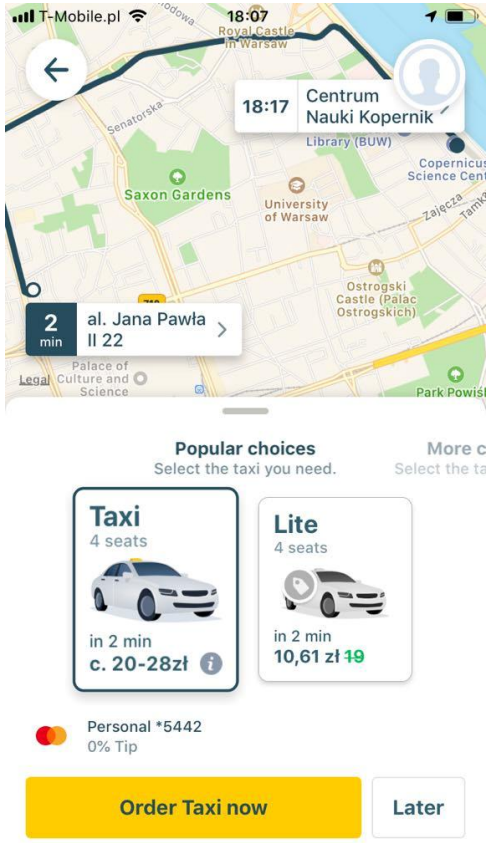


Fee: 10 PLN

TaxiSmart

Fee: 19 PLN

MyTaxi

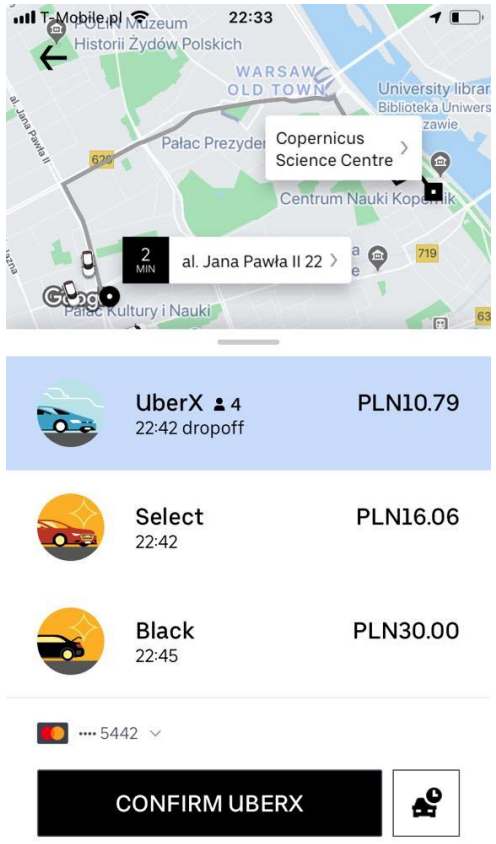


Fee: 24 PLN[1]

Note: Prices calculated for the weekend (28.04.2019) - about 6 pm.
(1) Average fee calculated
Sources: Data gathered from the mobile apps of mentioned providers

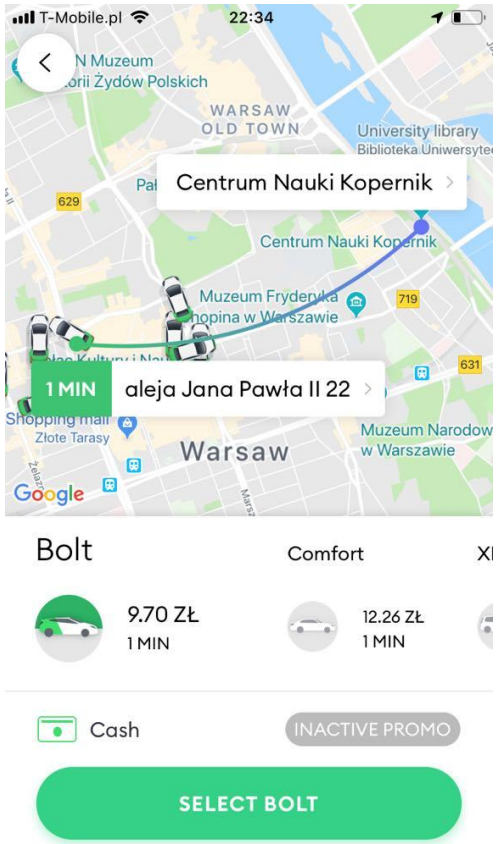
Ride-hailing operators – prices comparison 3/3 (weekend prices - about 10:30 pm)

Uber



Fee: 11 PLN

Bolt

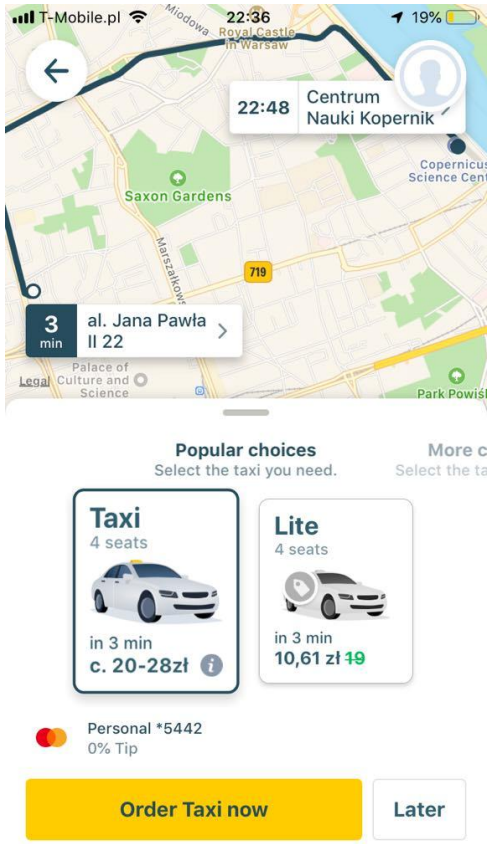


Fee: 10 PLN

TaxiSmart

Fee: 19 PLN

MyTaxi



Fee: 24 PLN[1]

Note: Prices calculated for the weekend (05.05.2019) - about 10:30 pm.
(1) Average fee calculated
Sources: Data gathered from the mobile apps of mentioned providers

Ride-sharing

Ride-sharing and shared commuting – BlaBlaCar

BlaBlaCar is the biggest ride-sharing company operating in Poland. The company entered the Polish market in 2012 and offered the use of its services for free. After some time BlaBlaCar introduced the subscription model – BlaBlaPass.

Why BlaBlaCar achieved a success?

Sense of community

BlaBlaCar does not identify itself as a service but as a community.

Cost-efficiency

Travelling with BlaBlaCar is more cost-efficient than the use of public transport.

Environmental aspects

Carpooling creates positive effects for environment by filling empty seats and reducing emissions generated by people travelling alone.

Flexibility

The company offers more flexibility – travelling without the need of checking fixed buses/trains schedules.

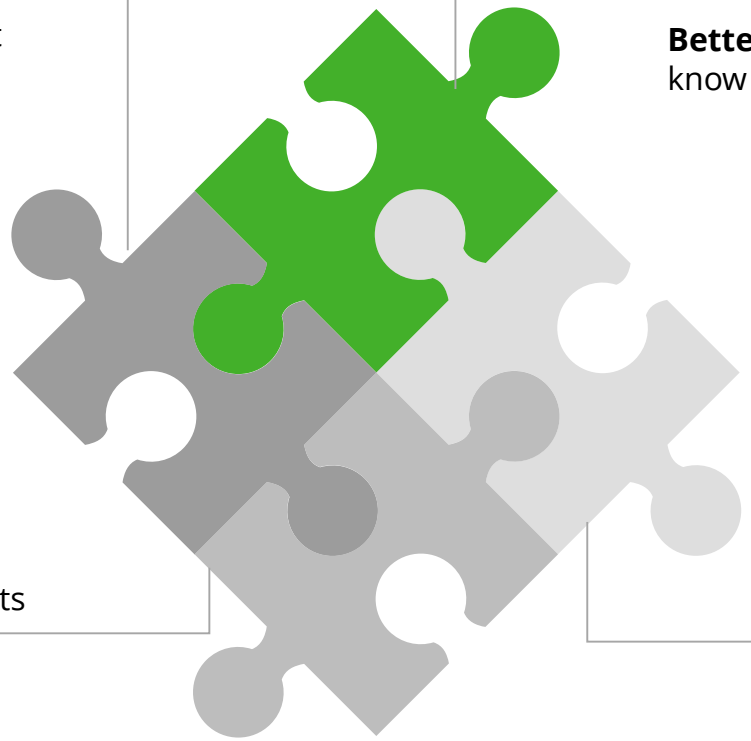
BlaBlaCar plans to introduce in Poland its **BlaBlaBus**. This new player can pose a threat to the incumbent Flexibus which does not have any significant competitor now.

Ride-sharing and shared commuting – inOneCar

InOneCar created the commuting solutions for companies.
The employees can go to work together and benefit from:

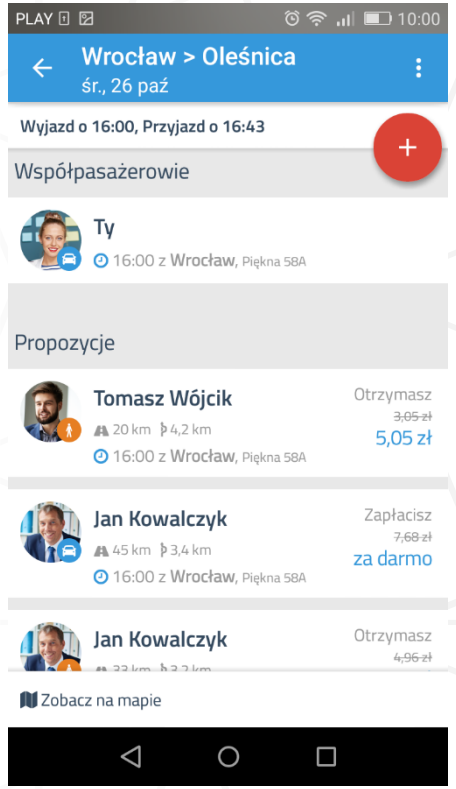
Elastic commute – setting the most convenient hours of departure and choosing the passenger

Better relations – they get to know each other and talk more



Sharing travel costs

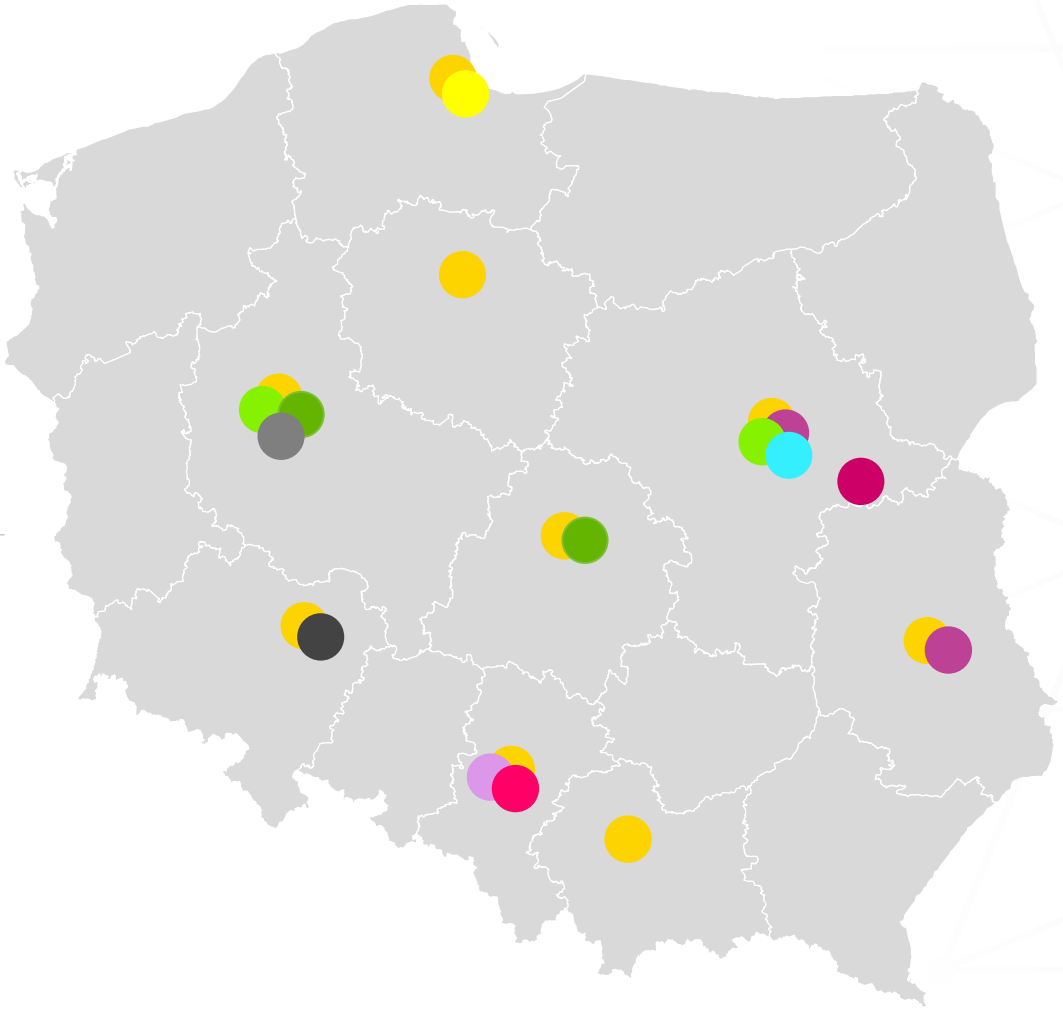
Parking places' problem reduced



Car-sharing

Car-sharing in Poland - concentration

Due to Traficar's calculations – the company holds 45% of car-sharing market



- Traficar
- Panek Car-sharing
- 4Mobility
- Vozilla
- Innogy Go!
- MiiMOVE
- EasyShare
- Click2Go
- GreenGo
- eCar by Tauron
- PGEMobility

Car-sharing – characteristics 1/3

Short-time car-sharing via the mobile app is one of the fastest growing MaaS segments in Poland. Three models of car rental service are available: open (free-floating) without any specified stations, closed (stationary) within defined areas and peer-to-peer.

Car rental system	Key characteristics
4Mobility	• In Poland since 2016 • Stationary and free-floating systems • Number of vehicles – around 160 • Available models: Hyundai i30, Audi A3, Audi Q3, BMW 1, BMW 3, BMW i3 (EV), Mini One • Electric cars available but mainly petrol-based • Places of operation : Poznań, Warsaw
Panek Car-sharing	• In Poland since 2017 • Free-floating system • Number of vehicles – around 1111 • Available models: Toyota Yaris Hybrid, Toyota Corolla, Electric Smart, Polonez Caro • Places of operation : Warsaw, Lublin
Traficar	• In Poland since 2016 • Stationary and free-floating systems • Number of vehicles – around 1700 • Available models: Renault Clio, Renault Kangoo Cargo, Renault Kangoo Van ZE, Zhidou D2S, Opel Corsa • 40 electric cars • Places of operation: Katowice, Kraków, Poznań, Trójmiasto, Warszawa, Wrocław, Bydgoszcz, Lublin, Łódź

Sources: Data gathered from the mobile apps of mentioned providers

Car-sharing – characteristics 2/3

Car rental system	Key characteristics
Vozilla	• In Poland since 2017 • Free-floating system • Number of vehicles – around 200 • Available models: Nissan Leaf I, Renault Zoe, Nissan eNV 200 **(all electric)** • Places of operation : Wrocław
EasyShare	• In Poland since 2017 • Free-floating system • Number of vehicles – around 200 • Available models: Toyota Yaris Hybrid • Places of operation : Łódź, Poznań
Click2Go	• In Poland since 2017 • Free-floating system • Number of vehicles – around 100 • Available models: Toyota Yaris Hybrid • Places of operation: Poznań
GreenGo	• In Poland since 2018 • Free-floating system • Number of vehicles – 20 • Available models: BMW i3 **(electric)** • Places of operation: Katowice

Sources: Data gathered from the mobile apps of mentioned providers

Car-sharing – characteristics 3/3

Car rental system	Key characteristics
eCar by Tauron	• In Poland since 2018 • Free-floating system • Number of vehicles – around 20 • Available models: VW eGOLF, Nissan Leaf I, Renault Zoe, Nissan eNV 200 **(all electric)** • Places of operation : Katowice
Innogy Go!	• In Poland since 2019 • Free-floating system • Number of vehicles – around 500 • Available model: BMW i3 **(all electric)** • Places of operation : Warsaw
MiiMOVE	• In Poland since 2019 • Free-floating system • Number of vehicles – around 200 • Available model: Opel Astra • Places of operation : Trójmiasto
PGE 4Mobility	• In Poland since 2019 • Free-floating system • Number of vehicles – 5 • Available model: Renault Zoe **(electric)** • Places of operation : Siedlce

Sources: Data gathered from the mobile apps of mentioned providers

Electric car-sharing – partnerships

The car-sharing service is usually treated by energy providers as an addition to **charging stations for electric vehicles** developed by them throughout the country.

PGE 4Mobility

After developing small electric fleet in Siedlce, **PGE decided to take over the fourth biggest car-sharing company** operating in Warsaw and Poznan. As the 4Mobility's fleet is composed mostly of the petrol-based vehicles**,** the capital from the transaction will be used to invest in its restructuring, fleet electrification and expanding to new cities.

eMobility

In comparison to 'electric peers', **e-mobility** (belonging to ENERGA Group) **does not target individuals but companies**.
Only employees of E-mobility's clients have the access to its electric vehicles. E-mobility car-sharing is now offered only for the residents of the office complex – Olivia Business Centre in Gdansk.

eCar by Tauron

ECAR is a **small electric car-sharing provider** operating in Katowice with the fleet composed of 20 electric vehicles. The service was developed by Tauron in collaboration with ING Bank Śląski.

Innogy Go!

Innogy developed first in Warsaw, the biggest in Poland, **the third largest in Europe fully electric car-sharing service.**

Energy companies see new opportunities and invest heavily in shared mobility. Four biggest operators invested in electric car-sharing by creating their own services or forming partnerships.

Car-sharing – prices comparison

Warsaw options

	Panek CarSharing	Innogy Go!	Traficar	4Mobility	*CityBee
Fee for 1 min	0,5 PLN	1,19 PLN	0,5 PLN	0,5 PLN	0,99 PLN [1]
Fee for 1 km	0,65 PLN	N/A	0,8 PLN	0,8 PLN	0,65 PLN [2]
Fee for 1min-stop	0,1 PLN	0,19 PLN	0,1 PLN	0,12 PLN	0,99 PLN [3]
Total fee for the ride – 60 km (60 min assumed) + 5 min stop	69,5 PLN	72,35 PLN	78,5 PLN	78,6 PLN	55,5 PLN

Tricity options

	Traficar	MiiMOVE	*CityBee
Fee for 1 min	0,5 PLN	0,5 PLN	0,99 PLN [1]
Fee for 1 km	0,8 PLN	0,8 PLN	0,65 PLN [2]
Fee for 1min-stop	0,1 PLN	0,1 PLN	0,99 PLN [3]
Total fee for the ride – 60 km (60 min assumed) + 5 min stop	78,5 PLN	78,5 PLN	55,5 PLN

Note: Calculations are made based on the prices found on the websites of different providers. Fees for basic options.
(1) Or 49 PLN per hour
(2) Only after overcoming 50 km
(3) For the operator there is no difference if the car moves or stops - the price for the minute is the same

*CityBee provides only vans' rental service

Car-sharing – prices comparison

Poznan options

	Click2Go	EasyShare	Traficar	4Mobility	*CityBee
Fee for 1 min	0,5 PLN	0,5 PLN	0,5 PLN	0,5 PLN	0,99 PLN [1]
Fee for 1 km	0,8 PLN	0,8 PLN	0,8 PLN	0,8 PLN	0,65 PLN [2]
Fee for 1min-stop	0,1 PLN	0,1 PLN	0,1 PLN	0,12 PLN	0,99 PLN [3]
Total fee for the ride – 60 km (60 min assumed) + 5 min stop	78,5 PLN	78,5 PLN	78,5 PLN	78,6 PLN	55,5 PLN

Katowice options

GreenGo	eCar by Tauron	Traficar
0,99 PLN	1 PLN	0,5 PLN
N/A	N/A	0,8 PLN
0,29 PLN	0,25 PLN	0,1 PLN
60,9 PLN	61,3 PLN	78,5 PLN

Note: Calculations are made based on the prices found on the websites of different providers. Fees for basic options. GreenGo prices gathered from autonaminuty.org.

(1) Or 49 PLN per hour
(2) Only after overcoming 50 km
(3) For the operator there is no difference if the car moves or stops - the price for the minute is the same

*CityBee provides only vans' rental service

Car-sharing – prices comparison

Wroclaw options

	Vozilla	Traficar	*CityBee
Fee for 1 min	1,1 PLN	0,5 PLN	0,99 PLN [1]
Fee for 1 km	N/A	0,8 PLN	0,65 PLN [2]
Fee for 1min-stop	0,1 PLN	0,1 PLN	0,99 PLN [3]
Total fee for the ride – 60 km (60 min assumed) + 5 min stop	66,5 PLN	78,5 PLN	55,5 PLN

*CityBee provides only vans' rental service

Green options, supported by municipalities and collaborating with energy providers, are usually **cheaper than hybrid/diesel ones.**

Note: Calculations are made based on the prices found on the websites of different providers. Fees for basic options. Calculations for Vozilla based on prices for the city centre. GreenGo prices gathered from autonaminuty.org.

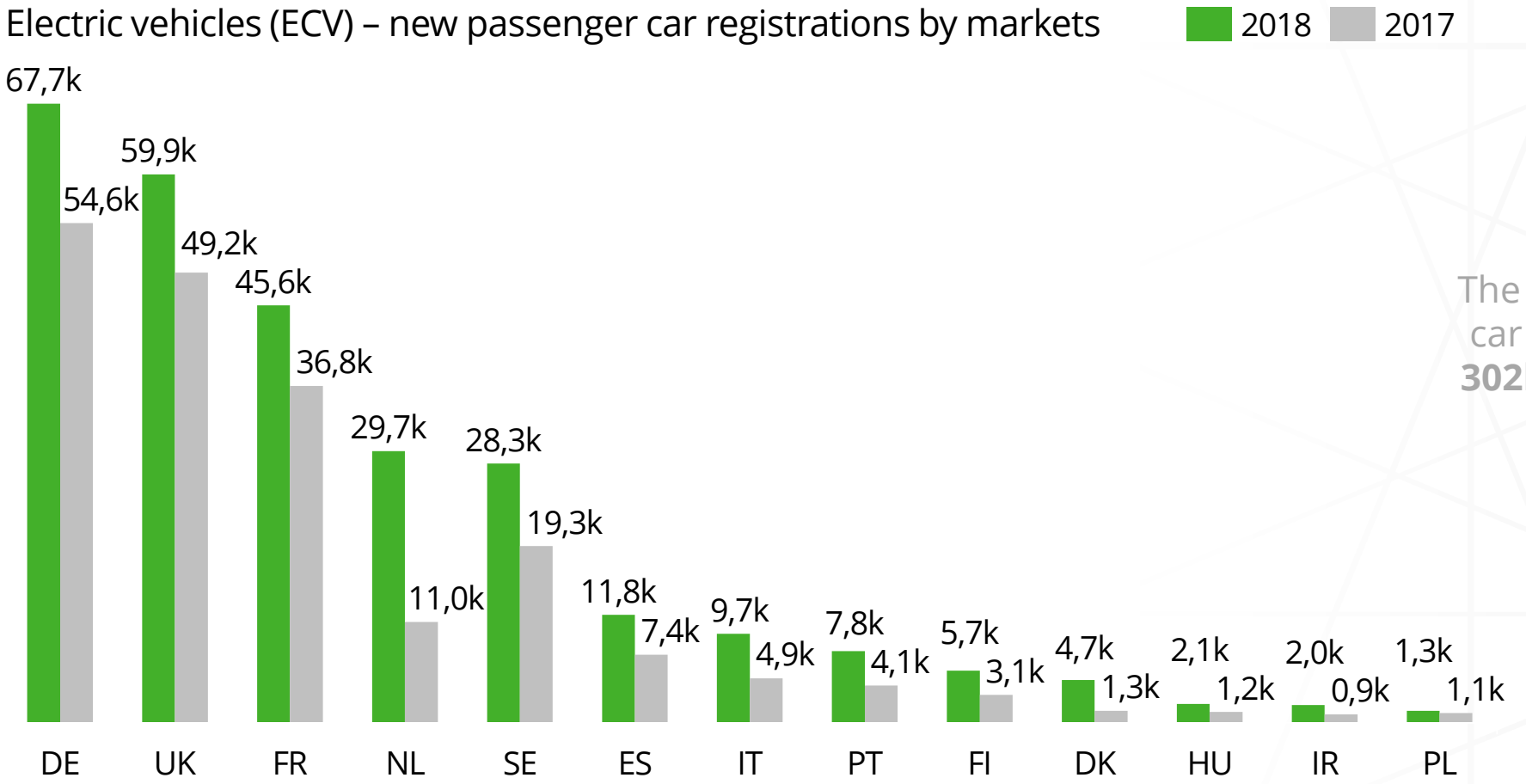
(1) Or 49 PLN per hour

(2) Only after overcoming 50 km

(3) For the operator there is no difference if the car moves or stops - the price for the minute is the same

Electromobility

Electromobility is one of the major challenges for the European automotive sector. The switch to 'electric' is fueled by emission limit targets for member countries imposed by the European Parliament.

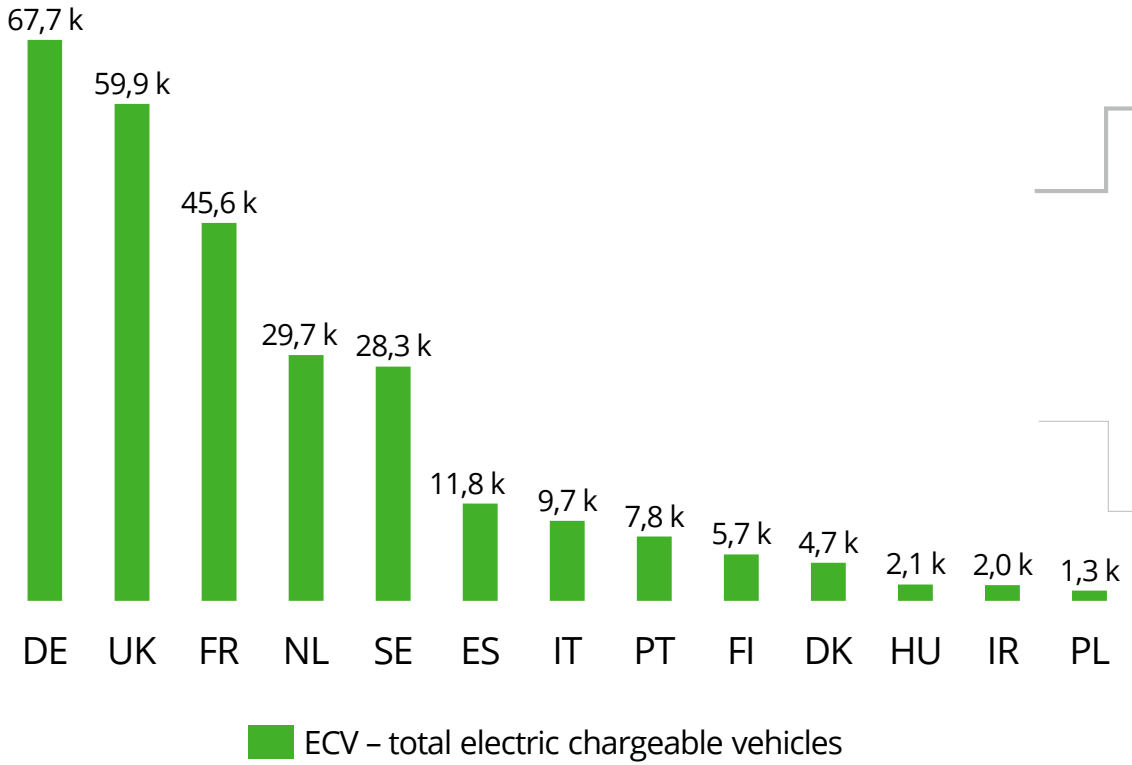


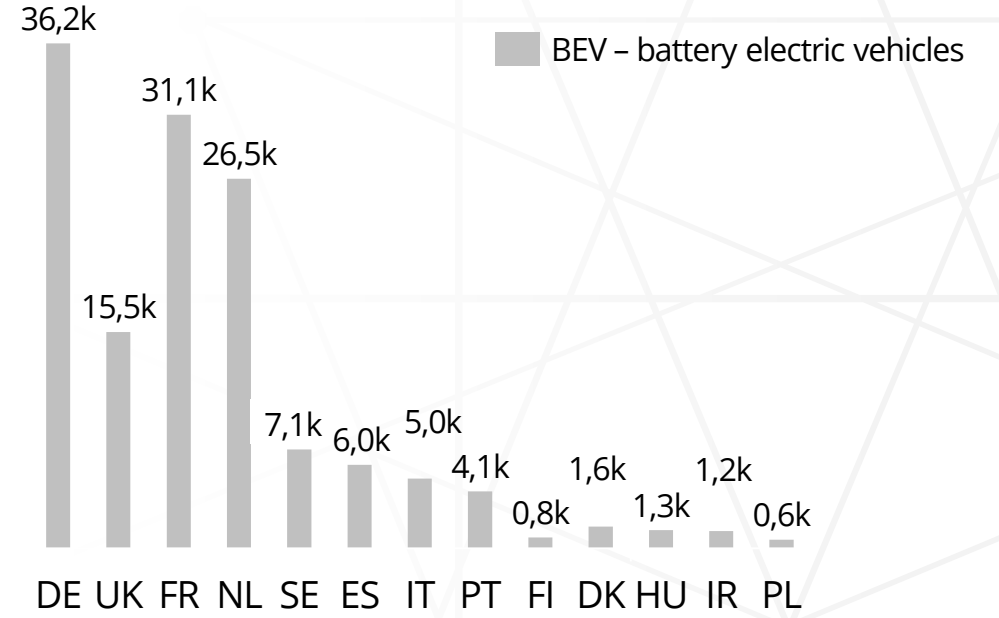
The total number of electric car registrations in EU was **302k in 2018** (38% increase since 2017).

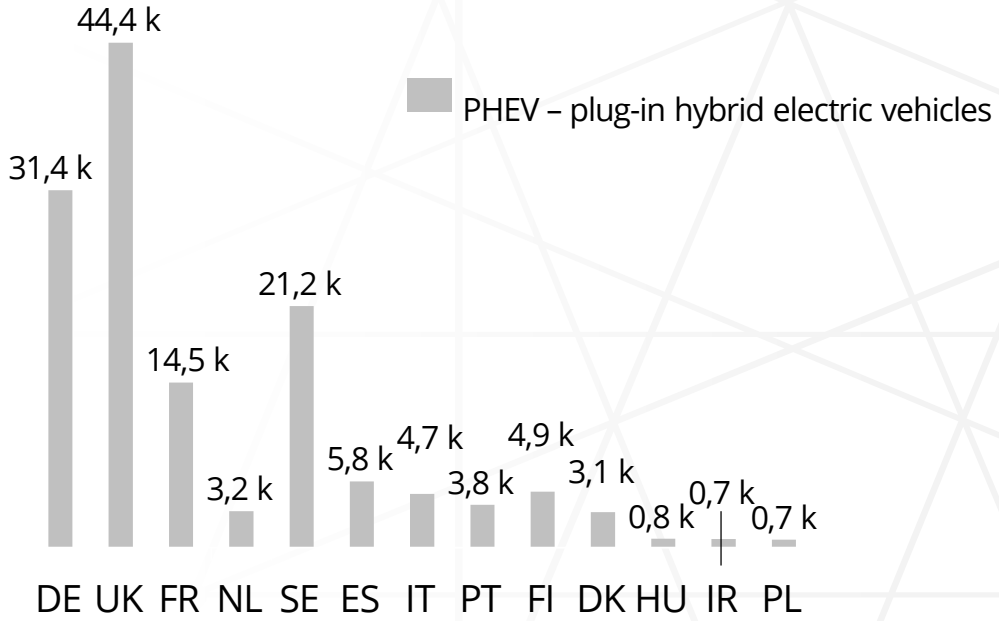
Source: ACEA

Electromobility

Electric vehicles (ECV) – new passenger car registrations by types in 2018







Source: ACEA

Regulation – taxis, ride-hailing or car-sharing, who will win?

Polish law does not keep up with the rapid changes in the mobility industry. Unregulated e-scooters' sector is only one of the multiple problems that need to be addressed by Polish legislator.

What are the taxi-drivers' demands?

- Mandatory license for ride-hailing
- Compulsory cities' topography exams
- The need of registering the economic activity

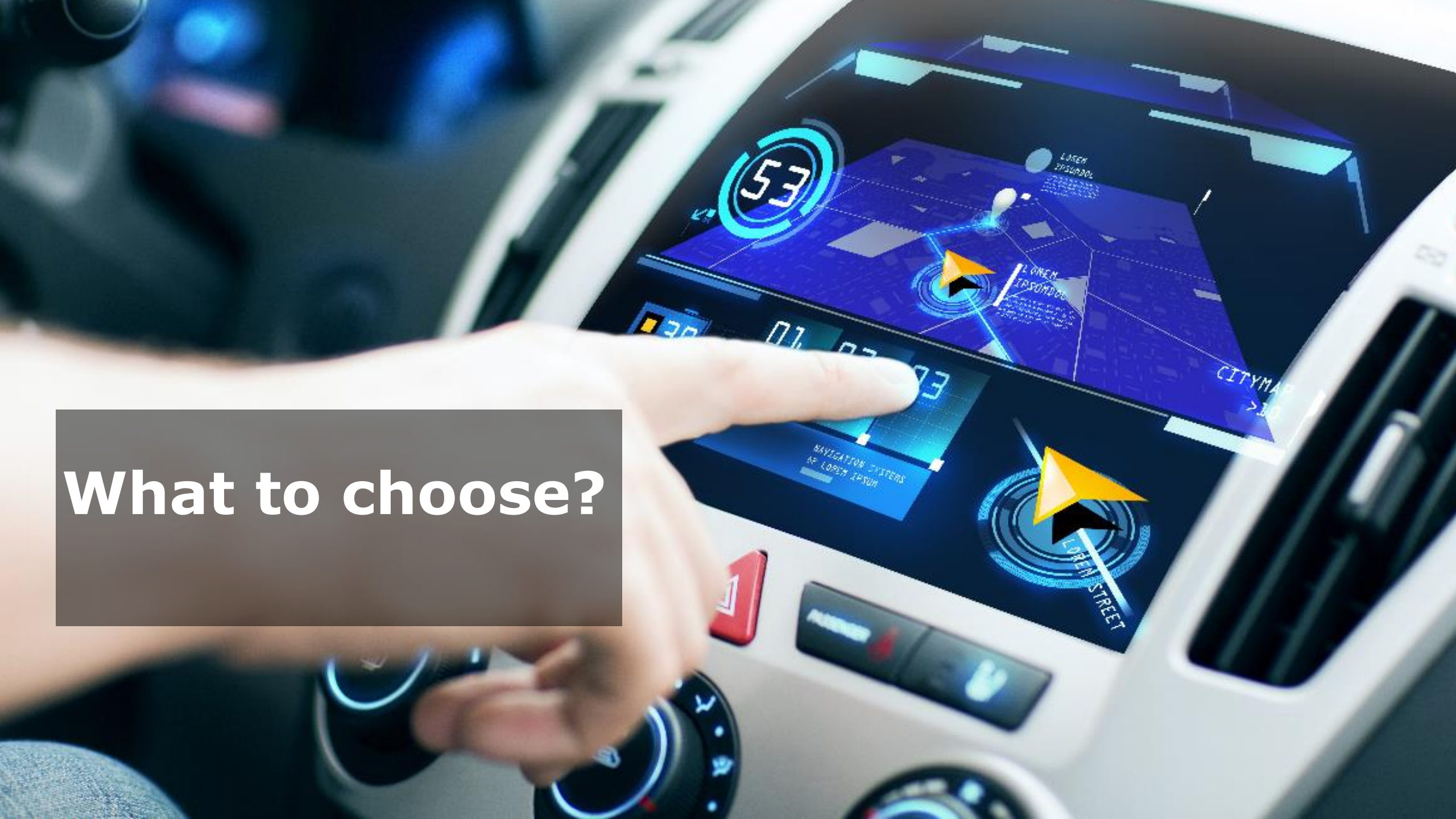
But what about car-sharing?

Polish legislator has introduced new regulation giving electric vehicles the **access to bus passes**.

What will be the impact of this move on the taxis competitiveness?

We want regulations that would ensure passengers safety and introduce clear and transparent criteria for entry

The voice of the Polish taxi-drivers



What to choose?

Average prices for 30-minutes ride – which option is the cheapest?

BIKES	1PLN/30 min
E-SCOOTERS	17 PLN/30min
E-MOPEDS	20PLN/30min
CAR-SHARING	36PLN/30 min

Assumptions:
(1) There is no initial fee
(2) There are no stops

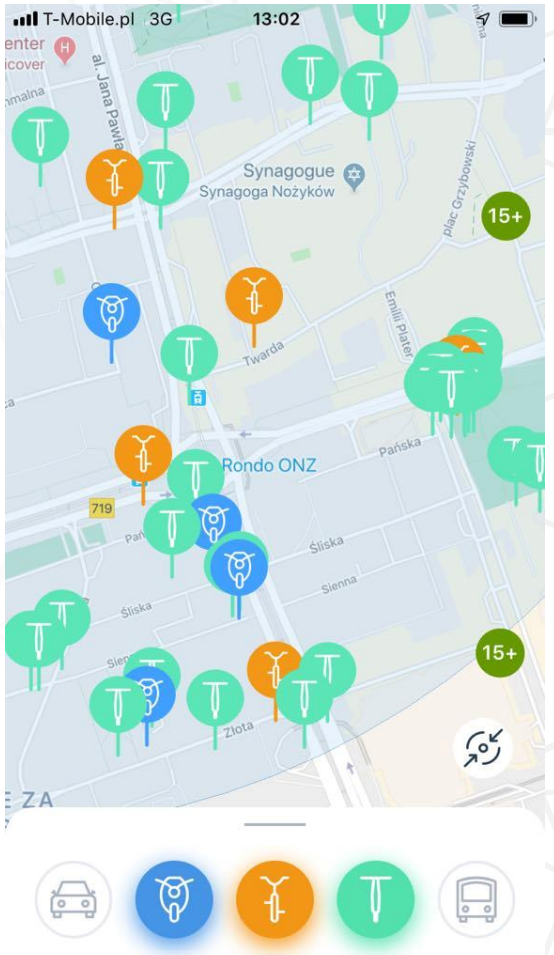
The price is only the one of the different factors taken into consideration while deciding which mode of alternative transportation to choose:

- Although bikes can be rented nearly for free, they require the **power of human muscles** to move
- The distance covered during 30 minutes ride depends on the **maximum speed** for each vehicle
- The **availability** and the **easiness to use** are sometimes the key drivers of customer's choice

What to choose – all options integrated

There are many initiatives trying to integrate the variety of available mobility options**: Loko.city, take&drive, Whelmee and Cive.** Although each of them gives the user a possibility to check the availability of different mobility modes, rental and payment are not possible. There are expectations that the company **Vooom** will be a game-changer:

- In comparison to other apps, Vooom enables its users to check not only the sharing options but also the public transport
- Until the end of the year, the company plans to introduce the intermodal trip planner connecting available options and planning the ride
- Vooom will allow its users to rent and pay for chosen mode of transport



Vooom mobile app

Deloitte.

Thank you

If you are interested in this topic and want to learn more, feel free to contact our experts.

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