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.

**2011**
**BIKE-SHARING**
Nextbike introduces its bikes in Wroclaw

**2012**
**IN-APP TAXIS**
MyTaxi launches an app connecting passengers with licensed drivers;

**RIDE-SHARING**
Blablacar initiates ride-sharing in Poland

**2014**
**RIDE-HAILING**
Uber begins to operate in Poland

**2016**
**CAR-SHARING**
Traficar offers first car-sharing services in Cracow

**2017**
**E-MOPEDS**
Blinkee.city introduces electric mopeds rental;

**E-CAR-SHARING**
Vozilla launches first urban all electric car rental service

**2018**
**E-SCOOTERS**
Lime introduces electric scooters rental
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.

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

- Car-sharing
- Electric mopeds
- Electric scooters
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

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.

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.

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.

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

<table>
<thead>
<tr>
<th>City</th>
<th>Available options</th>
</tr>
</thead>
</table>
| 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.
# Mobility options in Polish cities

<table>
<thead>
<tr>
<th>City</th>
<th>Available options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tricity</td>
<td>• 637 passenger cars per 1000 habitants &lt;br&gt;• Car sharing: Traficar, MiliMove &lt;br&gt;• Electric mopeds: Blinkee.city, Hop.City, Yumi.eco, EcoShare &lt;br&gt;• Electric scooters: Blinkee.city, Quick Ride &lt;br&gt;• Bikes: Nextbike (Mevo)</td>
</tr>
<tr>
<td>Cracow</td>
<td>• 611 passenger cars per 1000 habitants &lt;br&gt;• Car sharing: Traficar &lt;br&gt;• Electric mopeds: Blinkee.city &lt;br&gt;• Electric scooters: Hulaj, Blinkee.city &lt;br&gt;• Bikes: BikeU (Wavelo)</td>
</tr>
<tr>
<td>Bydgoszcz</td>
<td>• 569 passenger cars per 1000 habitants &lt;br&gt;• Car sharing: Traficar &lt;br&gt;• Electric mopeds: Blinkee.city &lt;br&gt;• Electric scooters: Blinkee.city &lt;br&gt;• Bikes: Nextbike (Bydgoski Rower Aglomeracyjny)</td>
</tr>
<tr>
<td>Łódź</td>
<td>• 551 passenger cars per 1000 habitants &lt;br&gt;• Car sharing: Traficar, EasyShare &lt;br&gt;• Electric scooters: Volt Scooters</td>
</tr>
<tr>
<td>Lublin</td>
<td>• 531 passenger cars per 1000 habitants &lt;br&gt;• Car sharing: Traficar, Panek &lt;br&gt;• Electric mopeds: Blinkee.city &lt;br&gt;• Bikes: Nextbike (Lubelski Rower Miejski)</td>
</tr>
</tbody>
</table>

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 seek 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

<table>
<thead>
<tr>
<th>Bike rental system</th>
<th>Key characteristics</th>
</tr>
</thead>
</table>
| **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 (Łomza), 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.

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

<table>
<thead>
<tr>
<th>System operator</th>
<th>Average initiation fee/deposit¹</th>
<th>Average fee for 1 hour²</th>
<th>Average fee for 3 hours²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next Bike</td>
<td>12 PLN</td>
<td>1,4 PLN</td>
<td>8,6 PLN</td>
</tr>
<tr>
<td>BikeU</td>
<td>14,8 PLN</td>
<td>1,25 PLN</td>
<td>8,8 PLN</td>
</tr>
<tr>
<td>Roovee</td>
<td>10 PLN</td>
<td>1,5 PLN</td>
<td>7,5 PLN</td>
</tr>
<tr>
<td>GeoVelo</td>
<td>10 PLN</td>
<td>3 PLN</td>
<td>9 PLN</td>
</tr>
<tr>
<td>Romet Rental System</td>
<td>19 PLN</td>
<td>0,5 PLN</td>
<td>3,5 PLN</td>
</tr>
<tr>
<td>Acro</td>
<td>99 PLN</td>
<td>1 PLN</td>
<td>6 PLN</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>System operator</th>
<th>Local brand</th>
<th>Initiation fee</th>
<th>Fee for monthly subscription (90 min per day)</th>
<th>Fee per minute after free time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next Bike</td>
<td>Mevo</td>
<td>10 PLN</td>
<td>10 PLN</td>
<td>0,05 PLN</td>
</tr>
<tr>
<td>BikeU</td>
<td>Wavelo</td>
<td>0 PLN</td>
<td>25 PLN</td>
<td>0,05 PLN</td>
</tr>
<tr>
<td>Roovee</td>
<td>ORM by Roovee</td>
<td>10 PLN</td>
<td>10 PLN</td>
<td>0,05 PLN</td>
</tr>
</tbody>
</table>

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.

70% of Nextbike revenues for 2018 came from municipalities.

Nextbike's incomes (Polish złoty)

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>32 m</td>
<td>44 m</td>
<td>61 m</td>
</tr>
</tbody>
</table>

The number of Nextbike's bikes

<table>
<thead>
<tr>
<th>Year</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>8 k</td>
<td>12 k</td>
<td>17 k</td>
</tr>
</tbody>
</table>

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
- Comfort linked with the possibility of ending the ride at any place
- Cost-effective and easier option for short trips, recreational aspects of the ride
- 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
<table>
<thead>
<tr>
<th>E-scooters’ operator</th>
<th>Key characteristics</th>
<th>Price for 30 min ride</th>
</tr>
</thead>
</table>
| 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

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

New players are expected to enter the market in the nearest future.
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/e-scooters.

How does it work

1. Buy a blinkee.city moped or mopeds
2. Add them to our fleet
3. We locate them in renowned city locations
4. Your mopeds earn you money whenever our users use them

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

Check your forecast income

Number of e-mopeds

<table>
<thead>
<tr>
<th>Number of e-mopeds</th>
<th>Expected revenue*</th>
<th>Cost</th>
<th>Net revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>4,372.65 €</td>
<td>1,100 €/moped</td>
<td>3,272.65 €</td>
</tr>
<tr>
<td>10</td>
<td>8,745.30 €</td>
<td>1,100 €/moped</td>
<td>7,645.30 €</td>
</tr>
<tr>
<td>15</td>
<td>13,118.05 €</td>
<td>1,100 €/moped</td>
<td>11,118.05 €</td>
</tr>
</tbody>
</table>

Expected revenue* (23% VAT included) monthly

Net unit price of a moped: 2,100 €
Net unit price of a scooter: 360 €
Net total investment cost: 22,500 €

Any questions? Contact us
Electric scooters – (un) regulation

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.

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.

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.

We wait for concrete solutions. The lack of regulation is not comfortable for us.
Marek Łusiak, Head of Lime Polska
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.

<table>
<thead>
<tr>
<th>Mopeds’ operator</th>
<th>Key characteristics</th>
</tr>
</thead>
</table>
| **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

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

*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.

<table>
<thead>
<tr>
<th>Subscription with monthly/daily limits</th>
<th>Prices for the plan</th>
<th>Minutes available</th>
<th>Price for each additional minute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly (Miejski)</td>
<td>59 PLN/month</td>
<td>100 min per month</td>
<td>0,39 PLN</td>
</tr>
<tr>
<td>Daily (Codzienny)</td>
<td>89 PLN/month</td>
<td>20 min per day</td>
<td>0,45 PLN</td>
</tr>
</tbody>
</table>
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.

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.

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

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

<table>
<thead>
<tr>
<th>Ride-hailing operator</th>
<th>Key characteristics</th>
</tr>
</thead>
</table>
| **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.**

<table>
<thead>
<tr>
<th>Ride-hailing operator</th>
<th>Key characteristics</th>
</tr>
</thead>
</table>
| **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**
- UberX: PLN12.30
- Select: PLN18.20
- Black: PLN30.00
- Fee: 12 PLN

**Bolt**
- Comfort: PLN12.30
- Cash: PLN12.30
- Fee: 12 PLN

**TaxiSmart**
- Fee: 16 PLN

**MyTaxi**
- Fee: 19 PLN

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**
- UberX: PLN10.93
- Select: PLN16.29
- Black: PLN30.00
- Fee: 11 PLN

**Bolt**
- Comfort: PLN10.15
- Select: PLN12.89
- Black: PLN30.00
- Fee: 10 PLN

**TaxiSmart**
- Fee: 19 PLN

**MyTaxi**
- Fee: 24 PLN

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
- Note: Prices calculated for the weekend (05.05.2019) - about 10:30 pm.

**Bolt**
- Fee: 10 PLN

**TaxiSmart**
- Fee: 19 PLN

**MyTaxi**
- Fee: 24 PLN

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

<table>
<thead>
<tr>
<th>Car rental system</th>
<th>Key characteristics</th>
</tr>
</thead>
</table>
| 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

<table>
<thead>
<tr>
<th>Car rental system</th>
<th>Key characteristics</th>
</tr>
</thead>
</table>
| **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

<table>
<thead>
<tr>
<th>Car rental system</th>
<th>Key characteristics</th>
</tr>
</thead>
</table>
| **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                                                                 |
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.
## Car-sharing – prices comparison

### Warsaw options

<table>
<thead>
<tr>
<th></th>
<th>Panek CarSharing</th>
<th>Innogy Go!</th>
<th>Traficar</th>
<th>4Mobility</th>
<th>*CityBee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fee for 1 min</td>
<td>0,5 PLN</td>
<td>1,19 PLN</td>
<td>0,5 PLN</td>
<td>0,5 PLN</td>
<td>0,99 PLN</td>
</tr>
<tr>
<td>Fee for 1 km</td>
<td>0,65 PLN</td>
<td>N/A</td>
<td>0,8 PLN</td>
<td>0,8 PLN</td>
<td>0,65 PLN</td>
</tr>
<tr>
<td>Fee 1min-stop</td>
<td>0,1 PLN</td>
<td>0,19 PLN</td>
<td>0,1 PLN</td>
<td>0,12 PLN</td>
<td>0,99 PLN</td>
</tr>
<tr>
<td>Total fee for the ride – 60 km (60 min assumed) + 5 min stop</td>
<td>69,5 PLN</td>
<td>72,35 PLN</td>
<td>78,5 PLN</td>
<td>78,6 PLN</td>
<td>55,5 PLN</td>
</tr>
</tbody>
</table>

### Tricity options

<table>
<thead>
<tr>
<th></th>
<th>Traficar</th>
<th>MiiMOVE</th>
<th>*CityBee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fee for 1 min</td>
<td>0,5 PLN</td>
<td>0,5 PLN</td>
<td>0,99 PLN</td>
</tr>
<tr>
<td>Fee for 1 km</td>
<td>0,8 PLN</td>
<td>0,8 PLN</td>
<td>0,65 PLN</td>
</tr>
<tr>
<td>Fee for 1 min-stop</td>
<td>0,1 PLN</td>
<td>0,1 PLN</td>
<td>0,99 PLN</td>
</tr>
<tr>
<td>Total fee for the ride – 60 km (60 min assumed) + 5 min stop</td>
<td>78,5 PLN</td>
<td>78,5 PLN</td>
<td>55,5 PLN</td>
</tr>
</tbody>
</table>

*CityBee provides only vans’ rental service

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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.
## Car-sharing - prices comparison

### Poznan options

<table>
<thead>
<tr>
<th></th>
<th>Click2Go</th>
<th>EasyShare</th>
<th>Traficar</th>
<th>4Mobility</th>
<th>*CityBee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fee for 1 min</td>
<td>0,5 PLN</td>
<td>0,5 PLN</td>
<td>0,5 PLN</td>
<td>0,5 PLN</td>
<td>0,99 PLN</td>
</tr>
<tr>
<td>Fee for 1 km</td>
<td>0,8 PLN</td>
<td>0,8 PLN</td>
<td>0,8 PLN</td>
<td>0,8 PLN</td>
<td>0,65 PLN</td>
</tr>
<tr>
<td>Fee for 1 min-stop</td>
<td>0,1 PLN</td>
<td>0,1 PLN</td>
<td>0,1 PLN</td>
<td>0,12 PLN</td>
<td>0,99 PLN</td>
</tr>
<tr>
<td>Total fee for the ride</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>– 60 km (60 min assumed) + 5 min stop</td>
<td>78,5 PLN</td>
<td>78,5 PLN</td>
<td>78,5 PLN</td>
<td>78,6 PLN</td>
<td>55,5 PLN</td>
</tr>
</tbody>
</table>

### Katowice options

<table>
<thead>
<tr>
<th></th>
<th>GreenGo</th>
<th>eCar by Tauron</th>
<th>Traficar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fee for 1 min</td>
<td>0,99 PLN</td>
<td>1 PLN</td>
<td>0,5 PLN</td>
</tr>
<tr>
<td>Fee for 1 km</td>
<td>N/A</td>
<td>N/A</td>
<td>0,8 PLN</td>
</tr>
<tr>
<td>Fee for 1 min-stop</td>
<td>0,29 PLN</td>
<td>0,25 PLN</td>
<td>0,1 PLN</td>
</tr>
<tr>
<td>Total fee for the ride</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>– 60 km (60 min assumed) + 5 min stop</td>
<td>60,9 PLN</td>
<td>61,3 PLN</td>
<td>78,5 PLN</td>
</tr>
</tbody>
</table>

*CityBee provides only vans’ rental service

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

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## Car-sharing – prices comparison

### Wroclaw options

<table>
<thead>
<tr>
<th>Provider</th>
<th>Fee for 1 min</th>
<th>Fee for 1 km</th>
<th>Fee for 1 min-stop</th>
<th>Total fee for the ride – 60 km (60 min assumed) + 5 min stop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vozilla</td>
<td>1,1 PLN</td>
<td>N/A</td>
<td>0,1 PLN</td>
<td>66,5 PLN</td>
</tr>
<tr>
<td>Traficar</td>
<td>0,5 PLN</td>
<td>0,8 PLN</td>
<td>0,1 PLN</td>
<td>78,5 PLN</td>
</tr>
<tr>
<td>*CityBee</td>
<td>0,99 PLN</td>
<td>0,65 PLN</td>
<td>0,99 PLN</td>
<td>55,5 PLN</td>
</tr>
</tbody>
</table>

*CityBee provides only vans' rental service

**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

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

- **GreenGO**
  - 21 PLN
- **eCar by Tauron**
  - 22 PLN
- **Vozilla**
  - 23 PLN
- **Panek**
  - 24 PLN
- **INNOGYGo!**
  - 26 PLN
- **Traficar**
  - 26 PLN
- **MiiMOVE**
  - 26 PLN
- **Click2GO**
  - 26 PLN
- **Easyshare**
  - 26 PLN
- **4Mobility**
  - 26 PLN

*Total fee for the ride – 20 km (20 min assumed) + 3 min stop*
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.

Electric vehicles (ECV) – new passenger car registrations by markets

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

ECV – total electric chargeable vehicles

BEV – battery electric vehicles

PHEV – plug-in hybrid electric vehicles

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

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

The voice of the Polish taxi-drivers

Ride-hailing faces challenges as taxi drivers call for equal rights.

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

<table>
<thead>
<tr>
<th>Option</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>BIKES</td>
<td>1 PLN/30 min</td>
</tr>
<tr>
<td>E-SCOOTERS</td>
<td>17 PLN/30 min</td>
</tr>
<tr>
<td>E-MOPEDS</td>
<td>20 PLN/30 min</td>
</tr>
<tr>
<td>CAR-SHARING</td>
<td>36 PLN/30 min</td>
</tr>
</tbody>
</table>

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.

Assumptions:
(1) There is no initial fee
(2) There are no stops
What to choose – all options integrated

There are many initiatives trying to integrate the variety of available mobility options: Loko.city, take&drive, Whelme 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 Voom will be a game-changer:

- In comparison to other apps, Voom 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.
- Voom will allow its users to rent and pay for chosen mode of transport.
Thank you

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

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