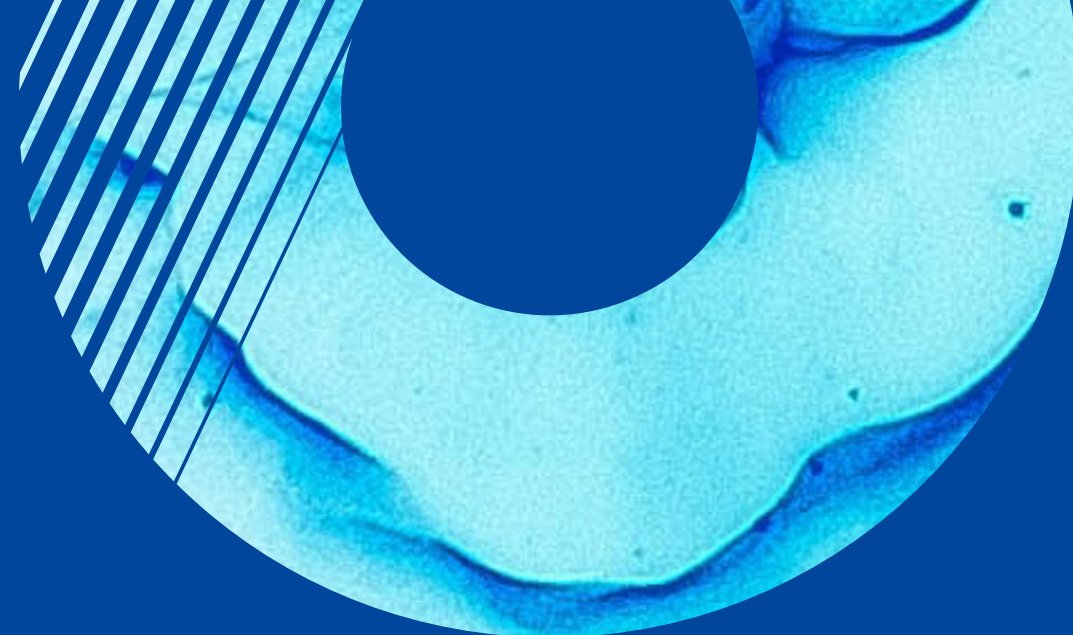


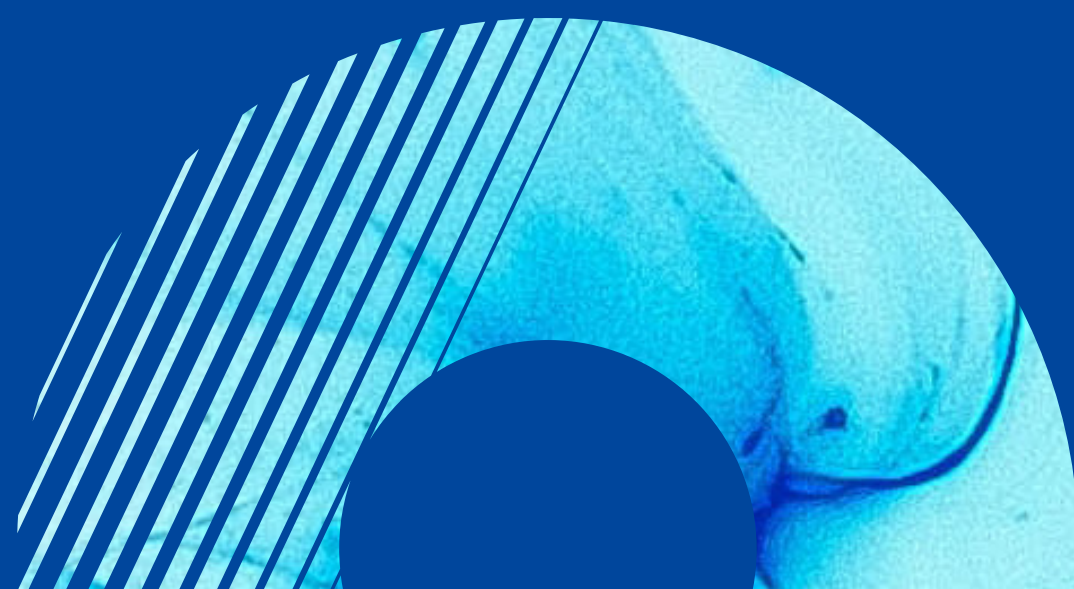


INVERS

INVERS Mobility Barometer Vol. 4

European Car Sharing 2024

invers.com



November 2024

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At a glance

Key numbers for the station-based (SB), free-floating (FF) and peer-to-peer (P2P) markets*

120k+

Fleet size
(SB, FF)

39

European
countries with
car sharing fleets

580+

Car sharing
operators
analyzed
(SB, FF, P2P)

360+

Vehicle models
(SB, FF)

7

Expert
interviews

5

Trends
explored

9

National
deep-dives

55+

Vehicle brands
(SB, FF)

Note: Statistics excluding the transcontinental markets of Turkey and Russia.

1

Intro

**Getting started with
definitions and scope**

Introducing the INVERS Mobility Barometer

In pursuit of fostering market insights and industry expertise, the INVERS Mobility Barometer series offers a curated selection of research findings from related industries and knowledge shared by market experts and practitioners.

We are excited to present our newest topic **“European Car Sharing 2024”**. This edition highlights the latest trends and developments in the European car sharing market. Previous reports have delved into topics such as [North American Car Sharing Market](#), [Large Vehicle Sharing](#), as well as [Microcars in European Car Sharing](#).

This publication compiles publicly available information and does not include “insider” knowledge from customers or other stakeholders.



Purpose and method

How this study can help

Purpose:

The Barometer aims to provide a quick and comprehensive understanding of pivotal market dynamics, insights, and trends. This report is designed to cater not only to stakeholders in the car sharing industry but also to a broader audience interested in mobility solutions.

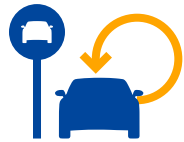
Method:

This publication leverages existing industry knowledge and enriches it with fresh insights gained through in-depth industry interviews and analysis of the current market landscape. We focus on the station-based, free-floating and peer-to-peer business models. For these key market segments, we aim to provide the best possible overview based on publicly available, but previously disaggregated, data. Other models, such as corporate car sharing and automated rental, are not the focus of this report. We focused on all European markets except Turkey and Russia as they also reach into the Asian market.



Examples of car sharing business models

Business models are increasingly overlapping

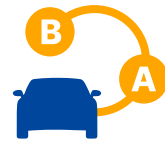


Station-based / round-trip car sharing

Station-based car sharing requires users to return the rented vehicle to one of the operator's locations or zones, usually the same one where they started their rental. This model overlaps with community or condominium car sharing.

Operator examples:

- Cambio (GER, BEL)
- Greenwheels (NED)
- Mobility (CH)



Free-floating car sharing

Short- to medium-term car rental service in which customers rent vehicles on demand and return them to any location within a defined geographic area.

Operator examples:

- Free2move (GER, ITA, more)
- Green Mobility (DEN)
- MILES (GER, BEL)



Peer-to-peer car sharing (P2P)

In P2P car sharing, the vehicles are not owned by the operator, but by individuals or other companies. The P2P operator acts as an agent in between users and vehicle owners/providers.

Operator examples:

- Getaround (across Europe)
- Snappcar (NED, GER)
- Turo (UK, FRA, beyond Europe)



Other

On page 41, we explore additional car sharing models that either go beyond the three main models or partially overlap with them. With the exception of teledriving, they are not the focus of this Barometer.

Examples:

- Automated rental
- Corporate car sharing
- Teledriving car sharing



Blurring the boundaries

An increasing number of car sharing operators apply multiple business models

There's an ongoing convergence of traditionally distinct car sharing models. The lines between different car sharing paradigms, such as free-floating, station-based, peer-to-peer and, in some cases, car subscription and automated rental, are becoming increasingly blurred. More and more operators are now incorporating combinations of these models into their service offerings.

Here are some noteworthy industry examples:

- In Germany, some formerly station-based-only providers have embraced “combined systems” (see bcs 2024).
- Bolt Drive, a ridesharing and kickscooter sharing provider, has gained traction in selected national car sharing markets.
- SIXT Share strategically leverages synergies with its classic rental business.

2

European market overview

**Station-based, free-floating,
and peer-to-peer car sharing combined**

Europe is home to more than 580 operators

Many strong brand examples across the continent in our three analyzed business models



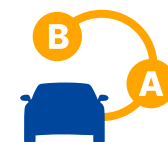
120,000 vehicles in station-based and free-floating car sharing alone

A growth of +14% compared to our 2023 reports

Across Europe, we identified more than 120,000 station-based and free-floating cars. 57,000 are station-based services. Another 63,000 vehicles operate in free-floating car sharing systems. Additional European car sharing vehicles can be found in other car sharing models such as peer-to-peer or corporate car sharing.

In our previous 2023 INVERS Mobility Barometers on “European Free-Floating Carsharing” and “European Station-Based Carsharing” (both published in 2023*), we identified 105,000 vehicles in both business models. Therefore, our 120,000 vehicles in this report represent an estimated +14% growth of the industry.

120,000 shared cars



63,000 free-floating cars

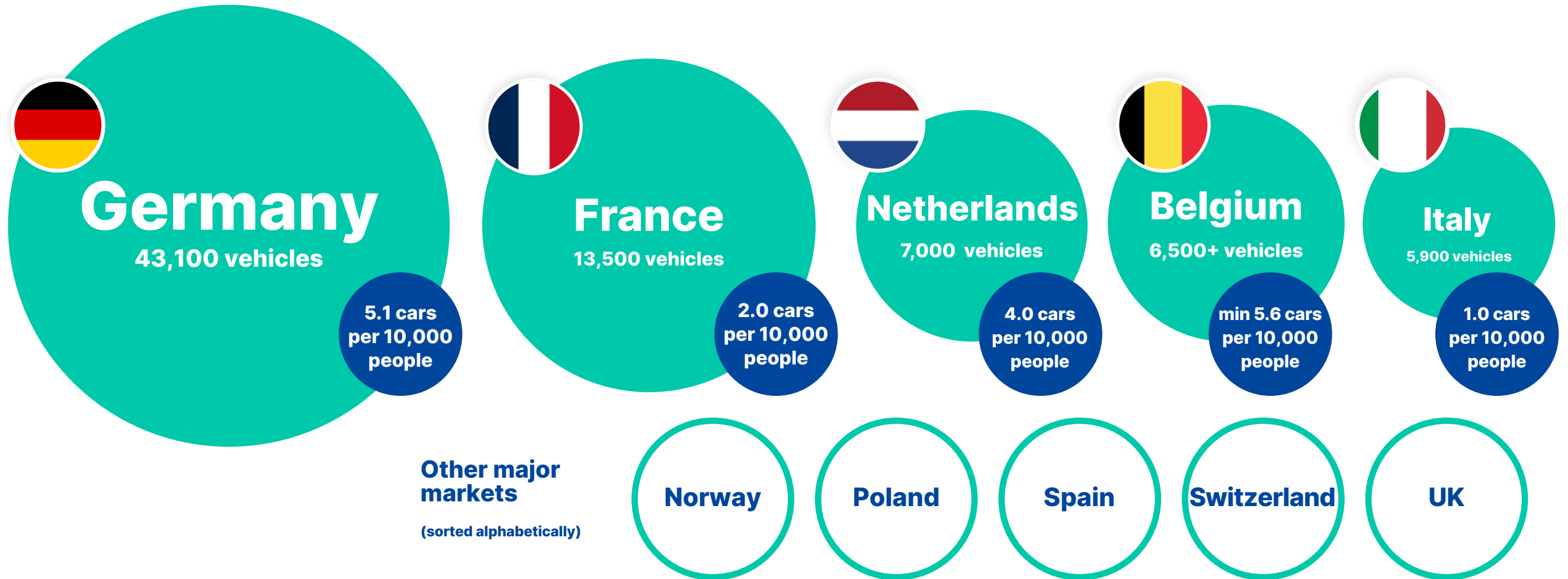


57,000 station-based cars

Note: 2023 data from INVERS Mobility Barometer on European Free-Floating Carsharing (INVERS 2023a) and INVERS Mobility Barometer on European Station-Based Carsharing (INVERS 2023b). Fleet size excluding the transcontinental markets of Turkey and Russia.

Top 5 European car sharing markets

Free-floating and station-based car sharing combined. P2P and other models excluded



Sources: Desktop study + Germany (bcs 2024), France (AAA 2023), Netherlands (CROW-KpVV 2024b), Belgium (own estimate based on Autodelen.net 2023, Autodelen.net 2024, and recent public operator data), Italy (Osservatorio Nazionale Sharing Mobility 2023). Market overview excluding the transcontinental markets of Turkey and Russia.

Regional breakdown

To simplify the market complexity and keep the insights digestible



Western Europe

Western Europe leads the continent in car sharing, with every country in the region boasting a thriving market.

Characteristics:

- Largest European market.
- Germany and France have the highest combined station-based and free-floating fleet sizes.



Southern Europe

Southern Europe presents a mixed market. It includes strong car sharing cultures like in Italy, Spain and Slovenia, alongside smaller markets such as Portugal, Greece, and Croatia.

Characteristics:

- Italy ranks in the top 5 European markets.
- Spain has a thriving free-floating market.



Eastern Europe

Eastern Europe is a dynamic car sharing region with numerous operators, including well-known names like Bolt Drive, Citybee, Spark, and Traficar.

Characteristics:

- Free-floating models dominate.
- Strong markets in Poland, the Czech Republic, the Baltics or Hungary.



Northern Europe

Northern Europe features a large number of operators, with car sharing widely used across Denmark, Sweden, Norway, Finland, and Iceland.

Characteristics:

- Station-based services are prevalent.
- Some cities like Copenhagen, Aarhus, and Helsinki have strong free-floating markets.

Western Europe

Europe's leading car sharing region

Western Europe leads the continent in car sharing, encompassing key markets such as Germany, France, Belgium, the Netherlands, Switzerland, Austria, the United Kingdom, and Ireland. Since the inception of global car sharing concepts, this region has risen to prominence, significantly shaping the European car sharing landscape.

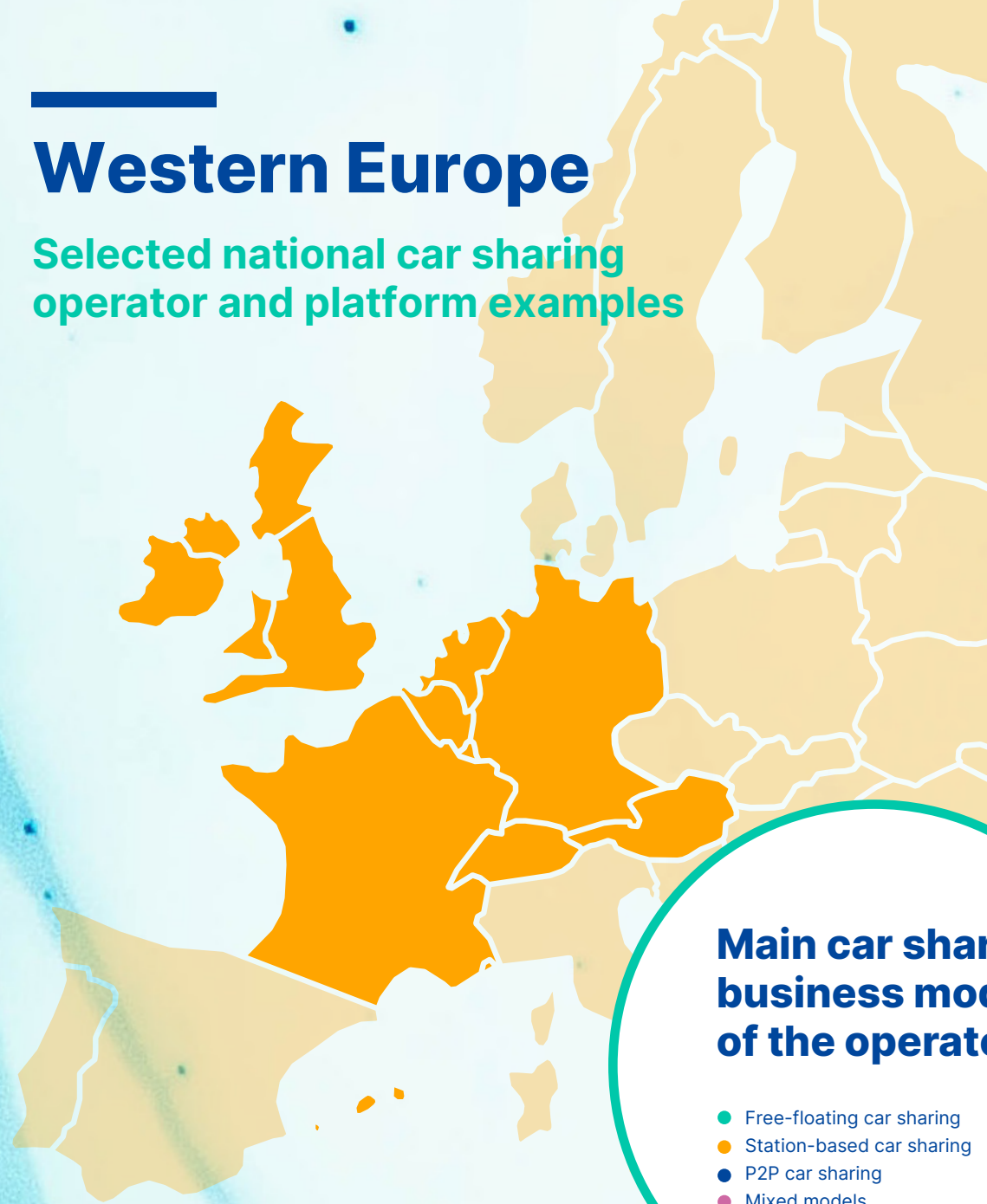
In contrast to other regions, we have not seen the dominance of a single business model; instead, car sharing is offered in large numbers across all modes. In addition, this region is home to the largest free-floating, station-based and peer-to-peer operators. Germany is the powerhouse of

European car sharing. 4 out of 5 of the strongest European car sharing markets (see page 12) are based here. Berlin, Paris, London, Amsterdam, Brussels and many other cities have thriving car sharing cultures.



Western Europe

Selected national car sharing operator and platform examples



Main car sharing business model of the operator:

- Free-floating car sharing
- Station-based car sharing
- P2P car sharing
- Mixed models

Andorra

- muvif

Austria

- Avant2go
- 123-Transporter
- caruso
- DRIVAR
- Getaround
- GoMore
- Family of Power
- Free2move
- ÖBB Rail&Drive
- sharetoo/WienMobil Auto

Belgium

- BattMobility
- Cozywheels
- Dégage
- Getaround
- cambio
- MILES
- Mobilize Share
- Poppy
- Wibee

France

- citiz
- Clem
- Communauto
- E+Share Drivalia
- Europcar On Demand
- Free2move
- Getaround
- Hertz 24/7
- marguerite
- Mobilize Share
- modulauto
- LEO&go
- Optymo
- Turo
- Ucar
- Yea!
- YesCapa
- Yélobobile

Germany

- Bolt Drive
- book-n-drive
- cambio
- Campanda
- deer
- Flinkster
- Free2move
- Getaround
- Hertz 24/7
- MILES
- PaulCamper
- scout24
- Snappcar
- SIXT Share
- stadtmobil
- Stattauto München
- teilAuto
- YesCapa

Ireland

- Driveyou
- Enterprise Car Club
- GoCar
- Goboony
- Hertz 24/7
- YesCapa
- YUKÖ

Liechtenstein

- Sponti-Car
- Share Birrer

Luxembourg

- Carloh
- Flex

Monaco

- Mobee

Netherlands

- CHECK
- Free2move
- Goboony
- Greenwheels
- MyWheels
- OnzeAuto
- PaulCamper
- SIXT Share
- Stapp.in
- Snappcar

Switzerland

- 2EM
- drivemycar
- edrive carsharing
- Enterprise Go
- Europcar on Demand
- GoMore
- Mobility
- MyCamper
- Quickrent
- Share Birrer
- Sponti-Car
- Swiss E-Car
- YesCapa

UK

- camplify
- Co Wheels
- Enterprise Car Club
- EVie
- Goboony
- Hertz 24/7
- Hiyacar
- Turo
- Zipcar

Eastern Europe

A hub for free-floating car sharing

In most car sharing cities in Eastern Europe, free-floating and to a lesser extent peer-to-peer car sharing are the dominant business models. In the Czech Republic, we can also find a vibrant station-based scene.

Poland is the largest car sharing market in Eastern Europe and home to the second largest free-floating market on the continent. Although not in focus of this report, Russia has a huge car sharing market, with a strong focus on free-floating car sharing as well.

Estonia boasts one of the highest per capita availabilities of car sharing in all of Europe. The other Baltic countries, Lithuania and Latvia, also have thriving car sharing scenes. A recent development was the merger of CarGuru and OXDrive in mid-2024.



Eastern Europe

Selected national car sharing operator and platform examples

Main car sharing business model of the operator:

- Free-floating car sharing
- Station-based car sharing
- P2P car sharing
- Mixed models

Belarus

- Anytime
- Hello
- Multimotors

Bulgaria

- GOeGO
- Spark

Czech Republic

- 123-Transporter
- Autonapul
- Hertz 24/7
- Bolt Drive
- Car4Way
- GreenGo
- HoppyGo
- Šárka

Estonia

- Beast
- Bolt Drive
- Citybee
- Elmo
- Forus Autolevi
- GoMore

Hungary

- 123-Transporter
- GreenGo
- MOL Limo
- Wigo

Latvia

- Bolt Drive
- CarGuru
- Citybee
- Fiqsy
- Forus Autolevi

Lithuania

- Bolt Drive
- Citybee
- Spark
- TryMyCar

Moldova

- amiGO
- Getmancar

Poland

- 4Mobility
- Beep.rent
- Panek
- Traficar

Romania

- Hip.car
- Perpetoo

Slovakia

- HoppyGo
- Share Car

Ukraine

- Getmancar

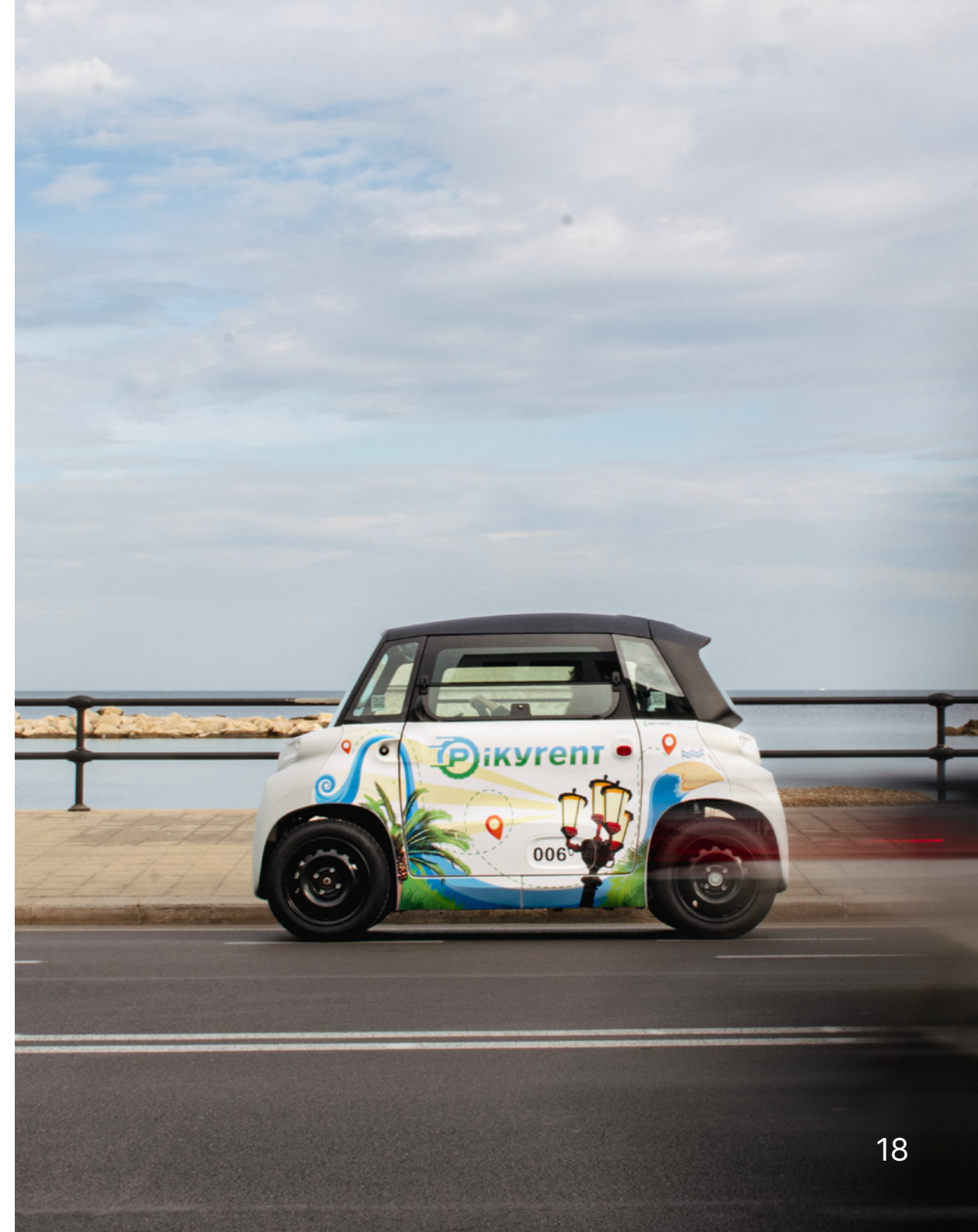
Southern Europe

Italy and Spain have the largest local fleets

The main markets in Southern Europe in terms of fleet size are Italy and Spain. In both countries, the free-floating car sharing fleet significantly outnumbers the station-based fleet, and both have well-developed peer-to-peer markets. Italy is currently the third largest free-floating car sharing market in Europe, while Spain ranks fifth.

Other local car sharing markets include Portugal, Slovenia, Croatia, Serbia and Greece. Although not the focus of this report, Turkey has a growing and well-developed car sharing market with players such as TikTak and Getir Drive. For more insights, please read our interview with TikTak on page 61.

Important developments include the first publication of a national car sharing barometer in Spain, the growth of the Slovenian market, and the emergence of the first Serbian free-floating operator.



Southern Europe

Selected national car sharing operators and platform examples

Main car sharing business model of the operator:

- Free-floating car sharing
- Station-based car sharing
- P2P car sharing
- Mixed models

Bosnia and Herzegovina

- e-GO Pure Motion

Croatia

- Avant2Go
- Campanda

Cyprus

- RideNow
- toGO

Greece

- AstyMove
- Campanda
- Caroo
- Goboony

Italy

- Amicar
- AmiGo
- Auting
- Campanda
- Carsharing Roma
- Corrente
- E+Share Drivalia
- Elettra
- Enjoy
- Europcar on Demand
- Evai
- Free2move
- Goboony
- Hertz 24/7
- Playcar
- Pikyrent
- Yescapa
- Zity

Malta

- Bolt Drive

Portugal

- Bookycar
- Campanda
- Hertz 24/7
- Yescapa

Slovenia

- Avant2Go
- Campanda
- GreenGo
- Share'Ngo

Spain

- Amovens by GoMore
- Campanda
- camplify
- Europcar on Demand
- Free2move
- Getaround
- GoTo
- Guppy
- MEC Carsharing
- Som Mobilitat
- Voltio
- Wible
- Yescapa
- Zity

Serbia

- Anygo

Northern Europe

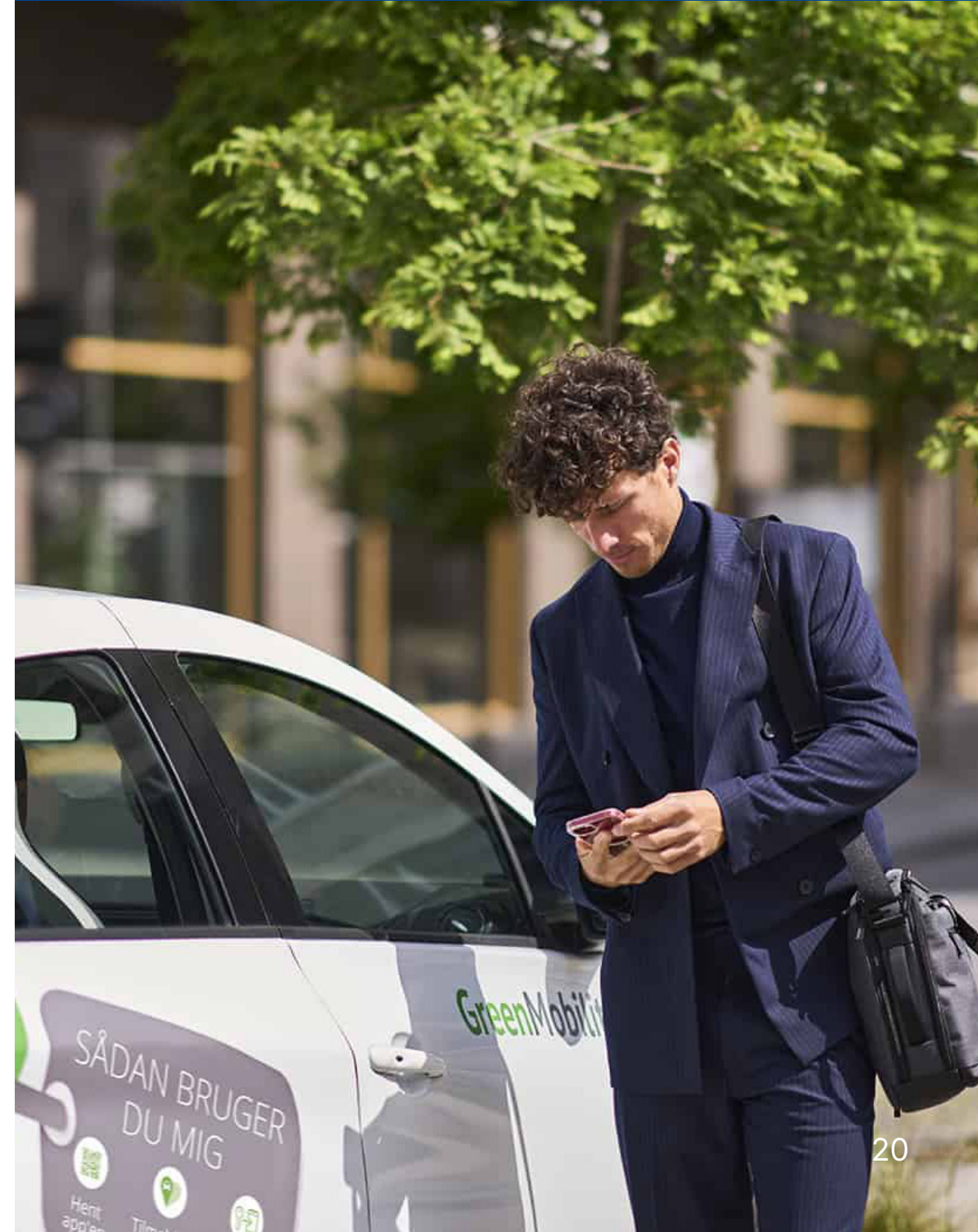
A traditional car sharing market with a focus on station-based and peer-to-peer

In most Northern European countries, station-based services and peer-to-peer car sharing dominate.

Major exceptions are Denmark, Finland, and Iceland, where significant free-floating car sharing scenes exist around operators like GreenMobility (Denmark) and Hopp (Iceland). In Norway and Sweden, station-based or peer-to-peer car sharing dominate. Finland is a mixed market.

Recent market developments include Aimo's pivot from free-floating to car subscription (Sweden), Hyre's acquisition of LetsGo (Denmark), or the expansion of GreenMobility's Danish fleet after Share Now's local exit.

Unlike many other long-established car sharing markets, the Nordic countries do not have a local car sharing association.



Northern Europe

Selected national car sharing operator and platform examples



Denmark

- GoMore
- GreenMobility
- Hyre
- KINTO Share
- Tadaa!

Finland

- 24Go
- 24Rent
- GoMore
- MyCamper
- Omago

Iceland

- Caritas
- Carrenters
- Hopp

Norway

- Bilkollektivet
- Campr
- Dele
- Getaround
- Hertz Bildeling
- Hyre
- MyCamper

Sweden

- Bilpoolen
- Ezeto
- GoMore
- Hyre
- Kinto Share
- MyCamper
- Lynk & Co.
- OKQ8
- OurGreenCar
- rulla
- Volvo on demand

Main car sharing business model of the operator:

- Free-floating car sharing
- Station-based car sharing
- P2P car sharing
- Mixed models

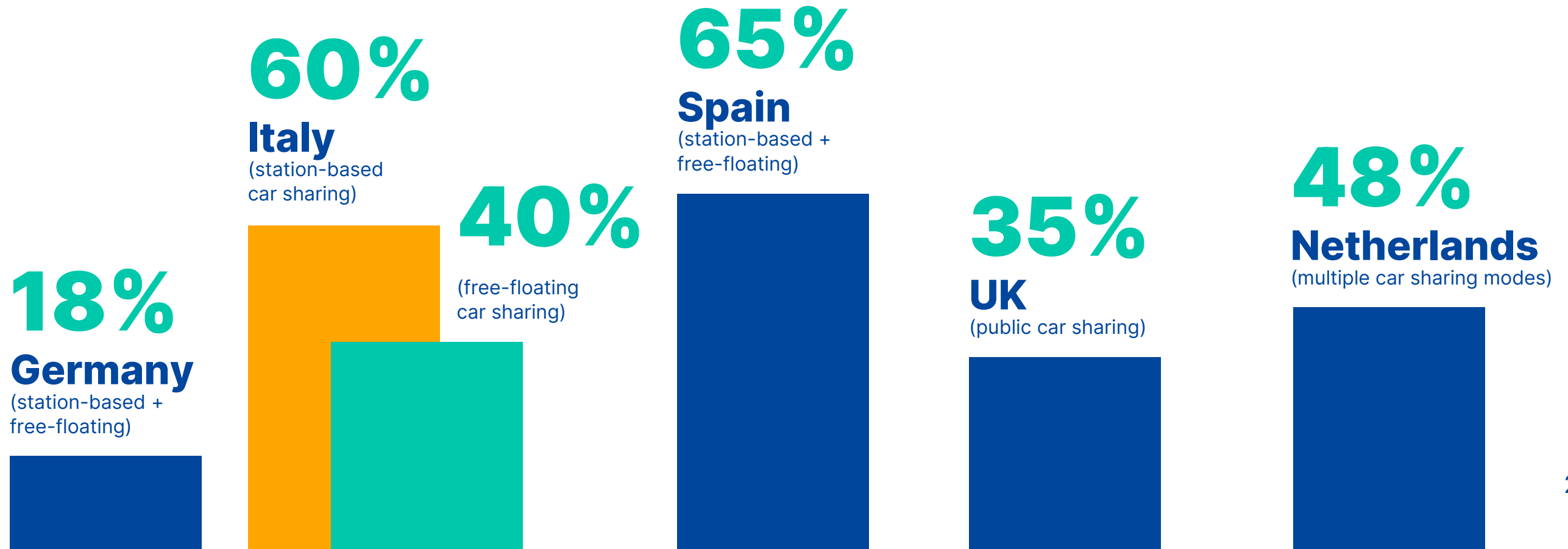
High fleet electrification

A high share of EVs in most car sharing markets

The ongoing electrification of car sharing fleets reflects a push by operators to increase the prevalence of electric vehicles (EVs). The visualized data below shows the aggregated fleet electrification in percent for the market segments indicated.

Car sharing plays a key role in driving overall national EV adoption. External national car sharing reports consistently show that in major markets, station-based, free-floating or combined car sharing fleets have significantly higher electrification rates than private vehicles. Around 50% of European station-based and free-floating operators offer at least one electric vehicle in their fleet, and almost a quarter of these are EV-only operators.

Sources: Germany (bcs 2024), Italy (Osservatorio Nazionale Sharing Mobility 2023), Spain (AVCE 2024a), UK (CoMoUK 2024), Netherlands (CROW-KpVV 2024a). Methods by quoted sources may vary.



Typical vehicle brands and models

A selection of common cars out of over 55 brands and 360 models in station-based and free-floating car sharing



Opel Astra



Peugeot 208



Fiat 500



Toyota Yaris



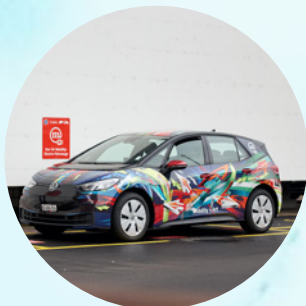
Renault Zoe



VW Golf



Seat Arona



VW ID. 3



Audi A3



Opel Corsa



Renault Clio



Audi Q2



Tesla Model 3



Renault Kangoo



Ford Transit

Examples of large vehicles in car sharing

A snapshot from campers and transporters



VW Crafter



Renault Kangoo



Mercedes Vito



Opel Movano



Nissan NV200



Renault Master



VW Caddy



Ford Transit Custom



Opel Vivaro



VW T6



Peugeot Boxer



Ford Transit Camper



Fiat Talento



VW T6 Campervan

2.1

Station-based car sharing

European market overview

Over 57k cars in use by at least 460 operators

Station-based car sharing is widespread throughout Europe

Station-based (SB) car sharing requires users to return the rented vehicle to one of the operator's designated locations or zones, usually the same one where they started their rental. This model overlaps with community or condominium car sharing and is often referred to as round-trip car sharing.

Since its implementation in the 1980s, station-based car sharing has steadily gained traction, serving as a key driver for the car sharing industry.

We currently estimate that the European market has over 57,000 station-based car sharing vehicles operated by at least 460 operators across 24 countries.* Noteworthy, a significant number of operators are small-sized and community-centered.

To put this in perspective, market analysts at Berg Insight estimate that the global car sharing fleet exceeded 575,000 vehicles by the end of 2022 (Berg Insight 2023, focusses on station-based, free-floating and corporate car sharing). Station-based services can be found not only in major cities, but also “in smaller cities and towns, as smaller user bases are enough for smaller fleets concentrated at selected locations” (Friedel 2021).

57k+ vehicles

**Estimated SB fleet size
(data as of Q3 2024)***

460

**Estimated number of
SB operators
(data as of Q3 2024)***

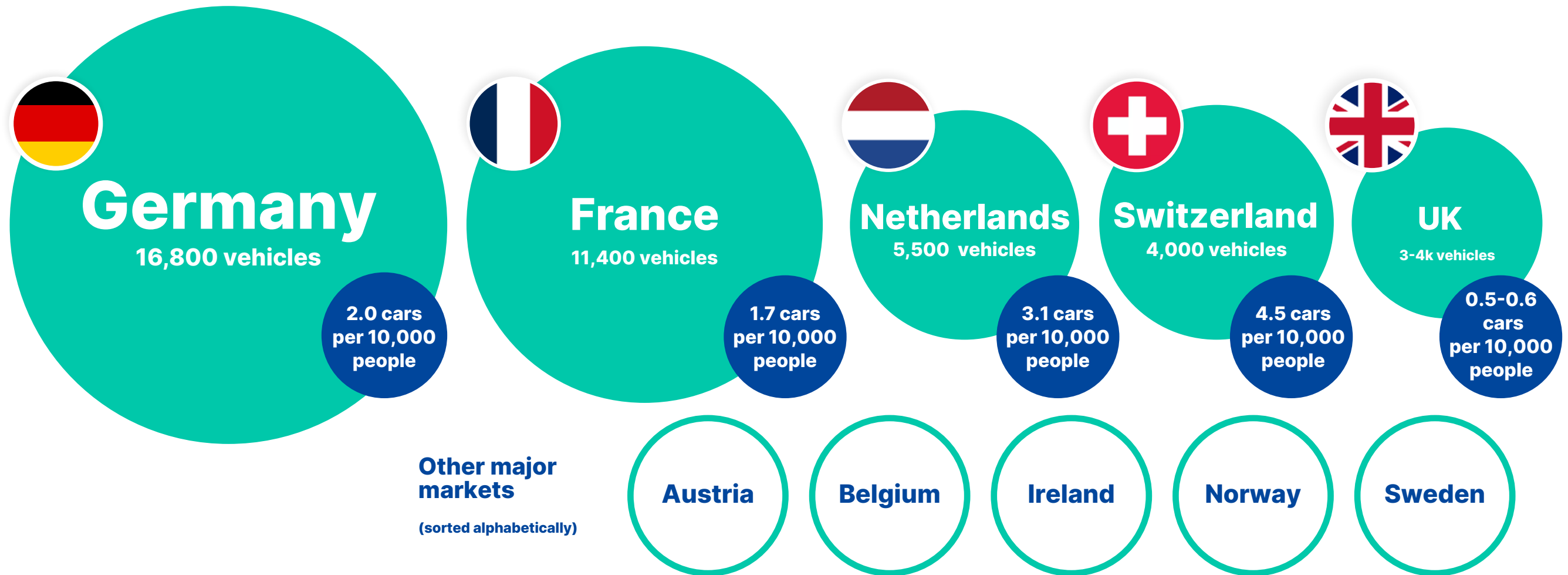
24

**Countries with SB operators
(data as of Q3 2024)***

***Info:** The 57,000+ European station-based car sharing cars are an estimate based on publicly available national and individual fleet size statistics and desktop research. Russia and Turkey not included in above data.

Top 5 European station-based car sharing markets

Germany is Europe's largest market, followed by France and the Netherlands



Sources: Desktop study + Germany (bcs 2024, includes some hybrid models), France (AAA 2023), Netherlands (CROW-KpVV 2024a), UK (own estimate based on overall publicly accessible car sharing vehicles from CoMoUK 2024 minus estimated size of non-station-based models), Switzerland (CHACOMO 2024). Market overview excluding the transcontinental markets of Turkey and Russia.

Examples of station-based operators (1/3)

Insights into selected operators



With over 200,000 customers and a fleet of several thousand vehicles in 46 German and 107 Belgian cities, Cambio is one of the largest station-based car sharing providers



As one of Germany's largest station-based car sharing operators, this provider boasts a robust network of stations in regions such as Rhine-Ruhr, Rhine-Main, Berlin, Stuttgart, Hanover, and Karlsruhe.



Founded in 1997 through the merger of the ATG Auto Teilet and ShareCom cooperatives, Mobility is now one of Europe's largest station-based car sharing network. It serves 245,000 customers with a fleet of around 3,000 vehicles across more than 1,500 stations.



Renault Group's Mobilize Share provides a station-based car sharing service alongside long-term rental options. Additionally, it operates in the free-floating market through its Zity sub-brand. Renault is also developing the Mobilize Duo microcar, which could be available for car sharing in the future.

USP

Early pioneer in the market with a focus on north-west Germany.

Focus on Western Germany, some free-floating services

Organized as co-op. Dense station network across the country.

OEM-backed (Renault), French focus

Vehicles used

Ford Fiesta, Renault Clio, Opel Astra, VW Caddy, and more

Opel Corsa, Dacia Sandero, Renault Kangoo, VW Golf, Renault Trafic, ...

Citroën C1, Toyota Yaris, Renault Clio, VW ID3, Renault Zoe, Skoda Octavia, Mercedes Vito, and more

Renault Zoe, Renault Master, Renault Trafic, and more

Notable cities

Köln, Berlin, Bonn, Dortmund, Bremen, Düsseldorf, Hamburg

Köln, Berlin, Stuttgart, Karlsruhe, Trier, Hannover

Zürich, Basel, Bern, Luzern, Genf, Lausanne

Paris, Bordeaux, Marseille, Lyon, Nantes, Montpellier

Examples of station-based operators (2/3)

Insights into selected operators



Founded in 2002 as France-Autopartage, Citiz has grown into one of the largest car sharing networks in France, comprising 14 local stakeholders. The network operates in over 220 cities with a fleet of 2,500 shared cars.

With over 20 years of industry experience, Zipcar is a leading car sharing operator, boasting a global fleet of over 12,000 vehicles.

Enterprise Car Club offers station-based car sharing in the UK and Ireland, with a fleet of at least 1,300 vehicles. Backed by the traditional car rental company Enterprise, it benefits from synergies with other Enterprise services.

Kinto Share, a service from Toyota, operates in Sweden, Spain, and other countries across Europe and beyond. Its offerings vary by country.

USP	Focus on France, dense network	Combination of strong station-based network and free-floating	Available in UK and Ireland. Synergies with car rental.	OEM-backed (Toyota), available in many countries in Europe
Vehicles used	Renault Twingo, Fiat Panda, Toyota Aygo, Toyota Yaris, Renault Clio, and more	VW Transporter, VW Polo, Vauxhall Corsa, MG ZS, Ford Puma, Vauxhall Corsa-e, more	e.g. Ford Fiesta, Vauxhall Corsa, and dozens of additional models	Toyota Yaris, Toyota RAV4, Toyota Proace, Toyota Corolla, Toyota Mirai, and more
Notable cities	More than 220 cities in France	London, Bristol, Cambridge, Oxford	220+ cities in total	Several cities across the continent

Examples of station-based operators (3/3)

Insights into selected operators

	 	 	   	 
	Greenwheels, one of the leading car sharing operators in the Netherlands, has 2,800 station-based vehicles nationwide. Founded in 1995, it offers services in various cities across the country.	MyWheels is a key station-based car sharing operator that offers a mix of fixed and (neighborhood) parking zones. They also have more than 800 volunteer vehicle ambassadors to help keep the cars in check. They are part of the Sharing Group and operate in numerous cities across the country.	Founded in 2017, Hyre is a leading car sharing operator in the Nordic region. Headquartered in Norway, it has expanded its services to neighboring Sweden and Denmark.	Previously known as Ubeeqo, Europcar on Demand operates in multiple markets with station-based services. In Germany, it specializes in corporate car sharing..
USP	A top player in the Netherlands	Offers a mixed model of classic stations and parking zones	Dense network in the Nordics	Backed by large car rental company Europcar
Vehicles used	VW Caddy, VW e-Up!, VW Up!, VW Golf, Skoda Citigo-e, and more	Renault Zoe, Citroen C3, Tesla Model 3, Opel Corsa, Hyundai Kona, BMW i3 MINI One, more	Skoda Octavia, VW ID.3, VW Caddy, Renault Trafic, Citroen C1, Toyota Aygo, and more	e.g. Fiat 500, Fiat Panda, Toyota Yaris, Citroen C3, Opel Corsa, Seat Ibiza, Ford Transit
Notable Cities	Available in 185 cities	All across the Netherlands	Oslo, Stockholm, Copenhagen, Bergen	Barcelona, Madrid, Milan, Paris

2.2

Free-floating car sharing

European market overview

63k cars by 80+ operators

Free-floating car sharing is widespread throughout Europe

Free-floating (FF) car sharing is a short- to medium-term car rental service where customers rent vehicles on demand and return them to any location within a defined geographic area.

The business model began to take off thanks to the pioneering role of station-based car sharing, followed by the increasing adoption of smartphones since 2006. In 2008, Daimler's Car2Go piloted a first major service in Ulm, Germany. BMW's DriveNow followed in 2011 as another pioneer. Today, it is a widespread car sharing business model across Europe (Fluctuo 2024). In 2023/2024, for the first time since we have been measuring the size of car sharing fleets across Europe, the number of free-floating car sharing vehicles exceeded the number of station-based car sharing vehicles.

We currently estimate at least 63,000 free-floating car sharing vehicles from 80+ operators in 29 countries in the European market*. To put this in perspective, Berg Insight market analysts estimated a global car sharing fleet size of more than 575,000 vehicles at the end of 2022 (Berg Insight 2023, focusing on station-based, free-floating and corporate car sharing).

63k+ vehicles

**Estimated FF fleet size
(data as of Q3 2024)***

80+

**Estimated number of
FF operators
(data as of Q3 2024)***

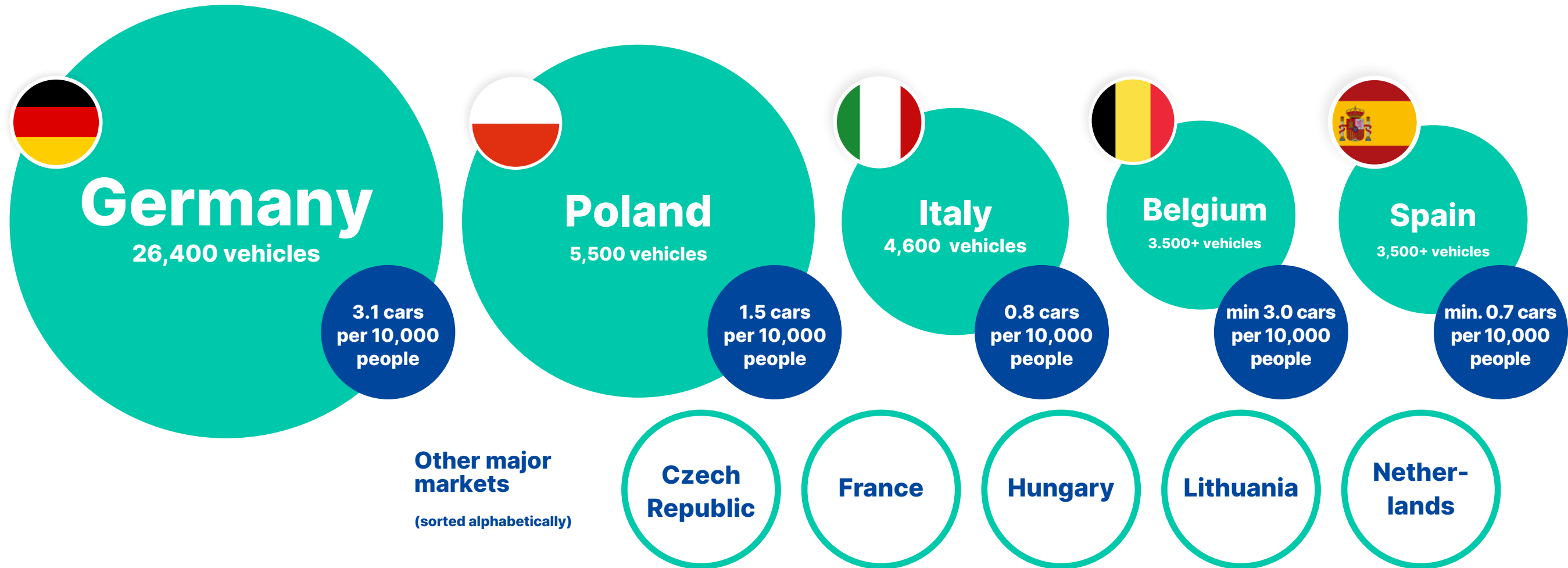
29

**Countries with FF operators
(data as of Q3 2024)***

***Info:** The 63,000+ European free-floating car sharing cars are an estimate based on publicly available national and individual fleet size statistics and desktop research. Russia and Turkey not included in above data.

Top 5 European free-floating car sharing markets

Germany is Europe's largest market, followed by Poland and Italy



Sources: Desktop study + Germany (bcs 2024), Poland (Mobilne Miasto 2022 basis and current own estimate), Italy (Osservatorio Nazionale Sharing Mobility 2023), Spain (AVCE 2024a, AVCE 2024b and own estimate), Belgium (own estimate based on Autodelen.net 2023, Autodelen.net 2024, and recent public operator data). Market overview excluding the transcontinental markets of Turkey and Russia.

Examples of free-floating operators (1/2)

Insights into selected operators



MILES, founded in 2016, is the largest free-floating car sharing company in our report, with around 21,000 vehicles. They are one of the few free-floating companies that have a kilometer-based pricing model. Headquartered in Berlin they have a team size of over 800 employees.

USP

Largest European free-floating operator, also rental & subscription

Vehicles used

VW ID3, Tesla Model 3, Audi A4, Opel Corsa, Cupra Born, Mercedes Sprinter, and more

Notable Cities

Berlin, Brussels, Hamburg, Munich, Cologne, Frankfurt



Just recently Free2move and former ShareNow completed their rebranding (now Free2move only). ShareNow emerged from the merger of Car2go and DriveNow. The company is one of the key free-floating car sharing operators in Europe.

Long history of car sharing, owned by OEM Stellantis

Fiat 500e, Peugeot e-208, Citroen C3, Opel Corsa, Peugeot 2008, Alfa Romeo, and more

Berlin, Madrid, Paris, Vienna, Hamburg, Munich, Rome, Milano, Amsterdam



SIXT Share, a German-based free-floating car sharing operator, is primarily known for car rentals but has expanded into MaaS solutions. Their app integrates both their own car sharing service and other mobility options.

Synergies with the SIXT rental division

Fiat 500, Renault Zoe, Hyundai Kona, VW Taigo, BMW 1er, Tesla Model 3, Audi Q5, and more

Berlin, Hamburg, München, Amsterdam, Rotterdam, The Hague



Estonia's Bolt initially gained recognition for its ride-sharing and micromobility services before expanding into car sharing across Europe.

Mobility platform offering ride-sharing, micromobility, and car sharing.

Audi Q2, Toyota C-HR, VW e-Up, Toyota Corolla, Peugeot e-2008, Mercedes Sprinter, and more

Tallin, Riga, Vilnius, Berlin, Prague

Examples of free-floating operators (2/2)

Insights into selected operators



Zity, part of Renault's Mobilize, operates free-floating car sharing in Madrid and Milan, mainly using the Dacia Spring. Mobilize's station-based car sharing activities are grouped under the Mobilize Share brand.



Poppy is a Belgian free-floating car sharing service active in major cities and airports. In 2024, they announced a pilot with Berlin-based Vay, using teledriving technology.



Enjoy is a major Italian car sharing operator known for its extensive free-floating and station-based services. They have introduced hundreds of microcars and offer subscriptions, car delivery, and other services.



Green Mobility operates an all-electric, free-floating car sharing system in Denmark. Recently, they have concentrated on enhancing profitability within the strong Danish market.

USP	Backed by Renault	Focus on Belgium. Integration of taxi services.	Focus on Italy and a leader in microcar offerings in Europe.	100% electric vehicles
Vehicles used	Dacia Spring	Audi A3, Opel Corsa, VW Polo, VW ID3, Toyota Yaris, VW Transporter, and more	Fiat 500, Fiat Doblo, XEV Yoyo, Toyota Yaris	Renault Zoe, Polestar, Mercedes eVito, Peugeot ePartner, Renault Kangoo, Maxus e-Deliver 3
Notable Cities	Milan, Madrid	Brussels, Antwerp, Liege, Charleroi	Florence, Milan, Turin, Rome, Bologna	Copenhagen, Aarhus

2.3

Peer-to-peer car sharing

European market overview

35+ peer-to-peer operators in at least 28 countries

The largest car sharing business model by fleet size, but exact numbers are hard to track

In peer-to-peer car sharing, vehicles are owned by individuals or other companies, not by the operator. The operator acts as an intermediary between users and vehicle owners/providers, often functioning as a platform or marketplace.

Examples of operators include Turo, Getaround, GoMore, Snappcar, Hiyacar, the Yescapa/Goboony platforms, as well as Paul Camper and Forus Autolevi.

Fleet sizes can be very large, but the exact aggregated European fleet size is unknown. Peer-to-peer car sharing operators tend to report global fleet sizes rather than regional or national fleet sizes. For example, Turo reports a global fleet size of 365,000 vehicles (Turo 2024, includes non-European markets); Getaround reports another 75,000 active vehicles worldwide that can be rented on their platform (Getaround 2024). While station-based and free-floating cars are used most days of the year and often by multiple users per day, the P2P fleet also includes cars whose owners make them available on a P2P platform for only a few days per year. As a result, fleet size data from different business models isn't easily comparable.

Largest fleet size

Across all 3 featured car sharing business models, but the exact market size unknown*

35+

Estimated number of major operators (data as of Q3 2024)*

28

Countries with P2P operators (data as of Q3 2024)*

*Info: Russia and Turkey not included in above data.

Examples of peer-to-peer operators (1/2)

Insights into selected operators

	 getaround	  TURO	 GoMore	  
	Founded in 2009, Getaround operates in over 950 cities across Europe and the USA. The platform provides both manual and digital vehicle handovers through its „Getaround Connect“ technology.	Originally launched in 2009 as RelayRides, Turo has emerged as a major car sharing company globally, claiming 365,000 vehicles on its platform worldwide.	Primarily focusing on the Nordic countries, GoMore also operates in various other European markets. In addition to car sharing, the company is active in car rental, car leasing, and ridesharing.	Founded in 2011, Snappcar has established a strong presence in P2P car sharing in the Netherlands, boasting over 10,000 vehicles on its platform. By 2022, it had served more than 1 million customers.
USP	Extensive fleet size across Europe, offering 24/7 access with keyless technology.	Significant fleet size in France, the UK, and North America; offers keyless access through "Turo Go" in the UK.	Strong emphasis on Northern Europe; features keyless technology.	Strong offer in the Netherlands
Notable Cities	950 cities across Europe and the USA	London, Paris, Manchester, Edinburgh, Lille, Marseille, Lyon, and many more	Copenhagen, Aarhus, Stockholm, Madrid, Tallinn	Amsterdam, Utrecht, Rotterdam, The Hague, Berlin, Hamburg

Examples of peer-to-peer operators (2/2)

Insights into selected operators



Founded in 2015, Hiyacar is a British car sharing service that operates a P2P marketplace alongside a station-based offering. It provides private car owners with „QuickStart“ technology, enabling keyless rentals.

USP

Hybrid model with P2P and station-based services; keyless "QuickStart" technology for P2P access.

Notable Cities

Greater London, Bristol and Hove, Oxford, Watford, Edinburgh, among others



In 2023, Yescapa and Goboony merged, creating a combined platform that offers over 30,000 P2P camping vehicles across Europe (promobil 2023).

Extensive selection of RVs and campervans; active in multiple markets.

Thousands of cities across Europe



Paul Camper is another major P2P camper platform and was acquired by Camplify in 2022. The acquisition now allows customers to book vehicles through one platform.

International platform offering seamless bookings in Europe and Oceania.

Many across Germany, Austria, Netherlands, UK, and Spain.



Originally founded in 2013 as Autolevi, this major car sharing platform in the Baltic states was acquired by Forus International, a facility management company that also provides taxi and ride-hailing services.

P2P car sharing platform focused on the Baltic states.

Many across Estonia, Latvia and Lithuania.

2.4

Other car sharing business models

Examples of models beyond free-floating, station-based, and peer-to-peer car sharing

Specialized business models

Beyond station-based, free-floating, and peer-to-peer solutions



Automated rental

By digitizing and automating the rental process, traditional rental companies have changed the user experience. Whether through apps or key stations, users now enjoy greater flexibility, managing bookings more efficiently. While automated rentals share similarities with car sharing, there are some key differences.

Operator examples:

- Toosla (FRA)
- UFODRIVE (GER, NED, UK, etc)
- Virtuo (FRA, ESP, POR, UK)



Corporate car sharing

Corporate car sharing allows employees to access shared vehicles for business use (and often also personal use). Some providers also extend their services to third-party customers.

Operator examples:

- Europcar on Demand (GER)
- Wigo Fleet (HUN)
- Arval (Europe)



Tele-operated car sharing

Tele-driving options are new and seeing cautious early pilots across the car sharing landscape. Vehicles are remotely driven to/from users. This model tackles the challenge of relocating cars for efficient use.

Operator examples:

- Poppy (BEL)
- Elmo (EST)
- Vay (USA)
- Halo (USA)



Community car sharing

Community car sharing is typically run by local operators, non-profits, or neighborhood groups. Often relying on partial volunteer support, these initiatives foster high local engagement and a strong connection between the operator and users. They focus on building a shared resource within close-knit communities.

Operator examples:

- OnzeAuto (NL)
- Dörpsmobil SH (GER)
- Stockholm Bilpool (SWE)

3

National deep-dives

Key insights and takeaways from external studies

Approach

Why and how we conducted the deep-dives

We curated and aggregated a selection of external national industry reports, creating shortcuts to valuable research.

Our selection criteria focused on:

- **Independence:** Reports produced by national car sharing associations with unbiased findings.
- **Key Markets:** Focusing on significant European car sharing markets.
- **Data Availability:** Choosing sources with comprehensive and reliable data.

As a result, we spotlight nine key publications, each offering unique industry expertise and research methodologies. These reports also provide in-depth insights into major European car sharing markets, allowing readers to explore the core of Europe's car sharing landscape. Although not the main focus of this publication, we also highlighted two transcontinental bridge markets that span both the European and Asian continents at the end of this chapter.



Deep-dive 1: Germany

Report name: FactSheet Carsharing in Deutschland 2024 (bcs 2024)

Founded in 1998, Bundesverband CarSharing e.V. (bcs) is the national car sharing association of Germany, Europe's largest car sharing market. With over 200 members, bcs publishes annual car sharing statistics that show the size and development of the national market. Car sharing is available in more than 1,280 German municipalities and cities and is provided by nearly 300 operators. With its analytical publications, bcs helps to understand the very complex German car sharing market. The latest report was published in early 2024.

Key insights:

Fleet size:

43,100 vehicles in total
(+27.1 % YOY).

Free-floating:

26,350 vehicles

Station-based:

16,760 vehicles in station-based
or hybrid systems

Registrations:

5.5 million registrations at all
operators (+23.1 % YOY)

Operators:

293 (+44 YOY)

Electrification:

17.8 % of fleet are EVs

Further reading:

[bcs\(2024\).](#)



“

GUNNAR NEHRKE,
Managing Director,
Bundesverband CarSharing
e.V. (bcs)

„Germany has the largest car-market in Europe. Most German providers have been operating successfully on a commercial basis for decades.“



Deep-dive 2: France

Report name: Baromètre Autopartage 2023 (AAA 2023)

The Association des Acteurs de l'Autopartage (AAA) represents nearly the entire car sharing market in France. Its annual report focuses on station-based and free-floating car sharing.

Once a year, the AAA releases the national car sharing barometer, offering insights on fleet size, composition, user base, emissions, and regional distribution. The latest edition was published in June 2023.

Key insights:

Fleet size:

13,500 vehicles in 2023 (11,400 station-based, 2,100 free-floating) across 26 participating operators

Members:

almost 1 million registered users; 450k+ unique users estimated

Business models:

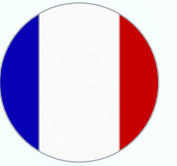
Station-based car sharing has a fleet size more than five times larger than that of free-floating car sharing.

Market penetration:

Focus on urban areas, but especially station-based car sharing is starting to penetrate more rural areas. Station-based car sharing is available in 14% of the communes urbaines (urban entities) vs. 156 of the 30k+ communes rurales (rural entities).

Further reading:

[AAA 2023](#)



NICOLAS FRASIE,
Co-Founder at Association des Acteurs de l'Autopartage & Head of Development and Public Affairs Europe at Communauto

„Car sharing is at a turning point in France: the rise of interest rates may reduce vehicle supply, even though car sharing is newly recognized as a lever for the ecological transition. All attention is focused on a state initiative aimed at designing a national plan to unlock the development of car sharing.“



Deep-dive 3: Netherlands

Report name: „CROW Kennisplatform“ (CROW-KpVV 2024b)

CROW-KpVV publishes annual statistics on the development and status of the Dutch car sharing market. The customizable online digital dashboards and online articles analyze and visualize fleet sizes, regional distribution, engine types and business models. Despite a methodology change in the latest report, the data shows steady growth in recent years. The dashboard is a great tool to discover the Dutch car sharing market in detail.

Key insights:

Fleet size: 7,920 car sharing vehicles (incl. station-based, free-floating, keyless P2P, and community car sharing), +23 % YOY

Station-based: 5,500 cars in a historically strong market.

Free-floating: 1,443 cars. Strong growth last year.

Peer-to-peer: 75,000 vehicles

Electrification: Rapid growth (+38 % YOY) to 48 % of the entire fleet (CROW-KpVV 2024a)

Further reading:
[CROW-KpVV \(2024b\)](#)



kennisplatform
CROW

“

DANI SPRECHER,
**Spokesperson of the Dutch Coalition
for Car Sharing Providers (Coalitie
voor Deelauto-aanbieders, CvD)**

„The Netherlands is one of the oldest European car sharing markets with an innovative car sharing culture. You'll find a shared car in almost every city across the country, and even in more and more smaller villages. Mostly thanks to the up and coming closed community and cooperation models, which are a perfect fit for car sharing in more rural areas.“



Deep-dive 4: Belgium

Report names: Impact Report. Car Sharing in Belgium 2022 (Autodelen.net 2023) & Car Sharing in Flanders in 2023 (Autodelen.net 2024)

Autodelen.net, a Belgian non-profit organization, offers a comprehensive overview of the national car sharing market, covering free-floating, station-based, and peer-to-peer services.

The 2022 report (Autodelen.net 2023) includes insights on car trips replaced, impact on travel behavior, a user survey of active car sharing users, many KPIs and user insights. Their annual overviews are a must-read for car sharing number crunchers.

Recently, they published an update for the Flemish car sharing market (Autodelen.net 2024).

Key insights:

Fleet size:

3,900 station-based and free-floating cars across Belgium in 2022, plus another 1,400 private car sharing cars. INVERS estimates that the station-based and free-floating markets have grown to over 6,500 vehicles by mid-2024.

Example Operators:

Poppy, Cambio, MILES, Dégage, Getaround, Wibee, Mobilize Share, Battmobility, Cozywheels, and more.

Penetration:

Car sharing is available in 75% of Flemish municipalities.

Business models:

Station-based and free-floating models are both very strong.

Further reading:

[Autodelen.net \(2024\)](#) and [Autodelen.net \(2023\)](#)



“

JEFFREY MATTHIJS,
Director of Autodelen.net

„Every year, the amount of shared cars in Flanders rises dramatically with 20 to 30 percent. It’s only a slight matter of time for carsharing to be present in all Flemish municipalities“



Deep-dive 5: Italy

Report name: 7. Rapporto Nazionale sulla Sharing Mobility (Osservatorio Nazionale 2023)

The Italian platform, Osservatorio Nazionale Sharing Mobility, launched in 2015, comprises over 130 members, including providers, research institutes, municipalities, and local authorities. With 5,900 car sharing vehicles, Italy is the fifth largest car sharing market in Europe. The last report showed a slight decrease in the free-floating fleet and a slight growth for station-based operators. This annual report is a valuable resource for anyone interested in shared mobility, offering comprehensive coverage of the national market along with various analyses. Well worth a full read.

Key insights:

Fleet size:

5,900 vehicles (4,600 free-floating, 1,300 station-based)

Trips:

6.4 million trips (majority free-floating)

Driven distance:

averages of 12.2 km (free-floating) and 26.7 km for (station-based), with a total of 83 million kms of distance travelled (majority free-floating)

Travel time:

on average 109 min (free-floating) and 238 min (station-based)

Business models:

Free-floating providers have a larger fleet than station-based providers. The P2P model includes many operators.

Further reading:

[Osservatorio Nazionale 2023](#)



SHARING MOBILITY
Osservatorio Nazionale

“

LUIGI LICCHELLI,
President of Assosharing

„The car sharing market in Italy, similarly to that of public transport, is still slowly recovering after the pandemic breakdown, which has profoundly changed people’s habits. In this context, it is crucial that policy makers meet the needs of the sector from a fiscal, infrastructural and regulatory point of view.“



Deep-dive 6: Spain

Report name: Carsharing Barometer 2024 (AVCE 2024)

The Association of Shared Vehicles in Spain (Asociación de Vehículo Compartido España, AVCE) was founded in 2020 and represents many Spanish car sharing operators. They constantly monitor, analyze and shape the Spanish car sharing landscape, and are an important voice in the transformation of the urban mobility system. In May 2024, they published their first car sharing barometer. Later, in September 2024, they published a short update on the first half of 2024. While there are more car sharing operators in Spain than those presented in the report, AVCE offers a solid national overview of the main brands.

Key insights:

Fleet size:

3,902 vehicles in station-based and free-floating (only AVCE members, 2023 report). Their most recent micro update already counts 4,400 vehicles in mid-2024.

Operators analyzed:

Free2Move | Share Now, Zity, GoTo Spain, Voltio, Guppy, Getaround, Wible and Eusko CarSharing Elkartea

Users:

The AVCE members combine a total of about 1.7 Mio registered users

Electrification:

Majority of the vehicles in operation are battery electric vehicles

Further reading:

[BAROMETRO-CARSHARING 2024](#)
(AVCE 2024a)

[Barometer Update 09/2024](#)
(AVCE 2024b)



Deep-dive 7: Poland

Report: „6 years car sharing in Poland“ (Mobilne Miasto 2022)

Mobilne Miasto published an overview of the first six years of car sharing in Poland in 2022. This shared mobility association represents various mobility operators in Poland and regularly publishes market analyses on new mobility developments. The 2022 car sharing publication addressed issues of market development, user characteristics, fleet composition, the impact of the pandemic on market composition, and barriers to increased electrification.

Since then, the overall fleet size is estimated to have remained relatively stable, though individual operator fleets have experienced fluctuations.

Key insights:

Fleet size:

5,500 vehicles (in 2022)

Operators:

Traficar, Panek, 4Mobility are the largest Polish operators (all free-floating). Beep.rent is an example of P2P car sharing

Top cities:

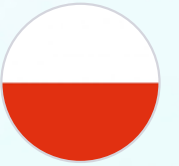
Tricity (Gdansk, Gdynia, Sopot), Warsaw, Kraków (based on shared cars per capita in 2022)

Business models:

The backbone of Polish car sharing is the free-floating model.

Further reading:

[Mobilne Miasto \(2022\)](#)



Deep-dive 8: United Kingdom

Report name: „Annual Car Club Report“ (CoMoUK 2024)

CoMoUK is the UK organization for shared transport. They cover services that share cars, bikes and e-bikes, rides in cars, e-scooters and Digital Demand Responsive Transport services (DDRT). Their car sharing reports are highly detailed and include a combination of operator data and user survey. CoMoUK also organizes the Annual Shared Transport Conference. Their latest annual car sharing report was published in mid-2024 and offers unparalleled access to national car-sharing data.

Key insights:

Fleet size:

4,513 vehicles publicly accessible, includes different car sharing business models, excluding closed corporate fleets

Fleet age:

Modern cars, as 57 % of cars are <2 years old

Members:

784,000 total members (+4 % YOY)

Business models:

Station-based car sharing widespread, free-floating provided by Zipcar in London

Electrification: 35% of publicly accessible car club cars

Typical use cases:

Leisure, shopping, visiting friends and family, and DIY projects

Further reading:

[CoMoUK \(2024\)](#)



“

RICHARD DILKS,
Chief Executive at CoMoUK

„The UK has seen continued growth in car club use and therefore in its direct and indirect delivery of benefits; with a more favourable policy environment, the sector could achieve even more to cut emissions and people’s costs.“



Deep-dive 9: Switzerland

Report name: „Zahlen & Fakten zum Shared Mobility Markt Schweiz. Car Sharing Dashboard“ (CHACOMO 2024)

CHACOMO (Swiss Alliance for Collaborative Mobility) represents the shared mobility sector in Switzerland. It provides a collective voice in the political process and public debate for its over 30 members, who account for more than 11 million shared mobility trips per year. CHACOMO regularly publishes data, insights and statistics on the development of the shared mobility industry in Switzerland, including car sharing. Their car sharing dashboard is the premier national resource for car sharing data and is updated biannually.

Key insights:

Fleet size:

Approximately 4,000 station-based car sharing vehicles. Another 5,000 P2P vehicles. No active free-floating car sharing. +11 % YOY fleet growth in overall car sharing fleet

Users:

More than 410,000 users (+21 % YOY)

Operators:

14 car sharing operators (10 part of CHACOMO market monitoring)

A powerhouse of station-based car sharing:

6,139 stations (+10 % YOY)

Trips:

1.4 million trips (+5 % YOY)

Further reading:

[CHACOMO \(2024\)](#)



MATHIAS HALEF,
Deputy Managing
Director at CHACOMO

„Switzerland has one of the densest station-based car sharing markets in Europe, measured by the number of car sharing vehicles per capita. Unlike in the pioneering days of the 1980s, car sharing in Switzerland today is a highly specialized market with numerous providers that have focused on different market segments and target groups.“



Zooming out: Transcontinental markets

Turkey and Russia are not in primary focus of this publication, but have considerable fleet sizes

Although not the main focus of this publication, we would like to highlight the two bridge markets that span both the European and Asian continents. While the Turkish market is estimated to have a car sharing fleet of thousands of vehicles, the Russian market alone is estimated to have tens of thousands of car sharing vehicles. In both country markets, free-floating business models play a key role in the local car sharing culture.

We are pleased that Ersan Öztürk, founder of the Turkish car sharing operator TikTak, gave us an in-depth interview on the Turkish market (see page 61).

Top market insights:

Selected operators in both countries:

Turkish operators include TikTak, Getir Drive, Minbee, Yoyo, or Rentiva. Russian operators include BelkaCar, Delimobil, Yandex.Drive, and City Drive.

Business models:

In both countries, the free-floating model is the most relevant business model.

Main cities with car sharing offer:

Istanbul, Ankara, Izmir, Moscow, Saint Petersburg.

“

ERSAN ÖZTÜRK,
Founder at TikTak (Turkish car sharing operator)

„The Turkish car-sharing market has grown rapidly due to urbanization, high vehicle costs, and the need for flexible, on-demand mobility solutions.“ (...)

„A key challenge in Turkish car sharing is limited public awareness.“



4

Interviews

**Talking to experts from European
car sharing operators**



Andrea Keiser

Team Lead Infrastructure & Electrification

Mobility

Switzerland

Mobility is the market leader in Swiss station-based car sharing. The cooperative offers its 277,000 customers more than 3,000 vehicles at 1,600 locations. According to Mobility, one of its cars replaces eleven private cars, saving space, reducing traffic and protecting the environment.

mobility.ch

Mobility is one of the largest car sharing cooperatives in the world. What does that mean for your users and how do you think it affects you as a company?

It is certainly a great advantage that Mobility has been around for over 25 years. We have gained a lot of experience in operating car sharing and have built up a dense network of over 3,000 vehicles. Switzerland is predestined for car sharing thanks to its small size and well-developed public transport network. In urban areas in particular, it is now easy to replace private cars with car sharing. The legal form of a cooperative also helps us to take a long-term perspective and not focus on short-term profit. There are many passionate fans among the members of the cooperative who are personally committed to Mobility and ensure broad support.

You provide car sharing in many rural areas. What advice would you give to other operators to take car sharing beyond the big cities?

It is more challenging to operate car sharing in rural areas. We almost always base our vehicles at railway stations because public transport in Switzerland also works well on the periphery. On the one hand, more people with an affinity for public transport live near train stations, and on the other hand, this ensures seamless, shared mobility. We also work with municipalities, areas and companies. They have the opportunity to establish Mobility car sharing in their area through sponsorship. Together, we can build a larger network and give more people access to shared vehicles.

Could you describe us your sustainability goals and how you plan to achieve them?

Our car sharing service is already fundamentally sustainable, as one shared car replaces 11 private vehicles. However, Mobility also wants to reduce its own emissions to net zero by 2040 and has therefore committed itself to the Science Based Targets initiative (SBTi). The biggest lever in reducing CO2 emissions is the conversion of the vehicle fleet to electric drives. There are already 600 electric cars in use, and the number is growing. In addition, Mobility customers can voluntarily pay an extra three Swiss Rappen per kilometer driven to take responsibility for the emissions caused by their journey. Every customer contribution is doubled by Mobility and invested in sustainability projects.

What is the optimal station density for station-based car sharing?

The answer to this question is far from trivial. Our 1,600 stations with over 3,000 vehicles are all integrated into a local system that is not the same everywhere. How well an individual location performs is a combination of factors and is not always predictable, even for us. It is clear that a dense network is very important, especially in cities, so that a car is available within walking distance even for last-minute requests. In Switzerland's largest cities, the nearest Mobility station is usually a five-minute walk away. If the demand is not quite sufficient for a self-service operation, we offer simple and attractive services for companies, municipalities and areas.



Pierre de Schaetzen

Chief Marketing Officer

Poppy

Belgium

Poppy is a Belgian car sharing company that operates a free-floating service in major cities across the country. In 2024, they announced an interesting pilot with teledriving technology from Berlin-based company Vay.

poppy.be

In collaboration with Vay and Ush, you are implementing a tele-driving feature in car sharing. What are your motivations and objectives behind this innovation?

This winter, we're launching a pilot project on public roads to remotely deliver cars to users, driving them directly to their requested location. It's still a human driving, but he's comfortably sitting behind a remote driving station in our offices. We aim to give Poppy users the ability to summon a shared car just like they would call a taxi. Eventually, users will have the choice: either drive the car themselves or be driven by a remote driver.

You have a large fleet of vehicles. How do you deal with damage and misbehavior of your fleet vehicles?

Brussels is known to be one of the most difficult European cities to operate in. When we started, fraud, vandalism and accidents were a real burden. To address these, we maintained a small fleet while implementing a series of solutions to mitigate these challenges. These efforts paid off, drastically reducing damage-related costs and enabling us to scale to over 1,000 cars profitably. Today, we are leveraging advanced sensors to better detect and attribute damages. Additionally, we're tackling the issue of smoking in cars by exploring smoke detection technology.

Can you describe your services and how multi-modality affects the user experience? How do you see the links with the taxi business?

Our goal is to offer a complete alternative to private and company cars in urban environments. While car sharing serves many needs, there are moments when taking a taxi is simply more convenient—whether it's late at night or when parking is limited. By combining the flexibility of car sharing with the convenience of taxi services, we offer users a seamless solution for most of their on-demand, four-wheel mobility needs.

What's your experience with your vans? How do they fit into the mobility needs of your customers?

We noticed our cars were often being used to transport larger objects, which wasn't ideal for the users or the vehicles. In response, we introduced vans as a better-suited option for such cases. Clearly there was a demand from users in Belgian cities for a more flexible and customer friendly van rental service.



Fabio Teti

Director of Administration,
Finance, Control and Commercial
of Tper spa & Head of “Corrente”
at Tper group

Corrente / Tper

Italy

Corrente is a free-floating car sharing service in the Italian region of Emilia Romagna. Behind the Corrente brand is the local public transport company Tper. In addition to car sharing, Corrente also operates shared mopeds.

corrente.app

What is your experience with operating a 100% electric fleet? What is the role of the ZTL (Limited Traffic Zone)?

The Corrente free-floating sharing project was designed to be electric from its birth because, as early as 2018, when we started thinking about this mobility initiative, we aimed to invest in the environment and eco-friendliness. Our experience in the sharing world began alongside the acquisition of practices and knowledge for managing an electric fleet. The Corrente service allows users to focus on the rental and driving experience without worrying about charging, cleaning, and sanitizing the car. Our staff takes care of these services.

From the outset, we established charging centers that have evolved over time and now enable quick charging, keeping cars available for users as much as possible.

During charging operations, our operators also clean and sanitize the vehicles. Once these activities are completed, vehicles are positioned considering user demand, prioritizing areas with higher car requests. Corrente also has a fleet of electric mopeds. In this case, batteries are replaced directly on the road by dedicated teams, based on instructions from the operations center. Access to ZTLs is essential for a sharing service, as is the ability to use preferential lanes (where possible). This is a valuable prerogative for enhancing the rental experience and improving user mobility by reducing rental times and costs while increasing ease of movement, particularly in city centers.

Corrente is managed by TPER. What are the synergies between car sharing and public transport?

TPER is the main public transport operator in Emilia Romagna. We have always believed that shared mobility is a natural complement to public transport. That's why, from day one, there have been discounted rates for holders of TPL subscriptions. Recently, thanks to a regional tender, holders of monthly or annual local public transport subscriptions not only benefit from a discounted rate but can also receive €10 of credit for each rental of a car or scooter, equivalent to about 40 minutes of free rental.

This has made sharing even more appealing. Many people use the bus to reach their sharing car or vice versa, or choose the scooter to get to a car or to the bus stop that will take them to work or home. This is a concrete example of intermodality that is working well in Bologna with increasing satisfaction.

What is your experience with minor damages to vehicles and how do you manage them?

With the latest fleet update, we have installed a device in vehicles that detects damages in real time, allowing us to clearly and transparently identify individual users. Even before this, we had activated a system, still present in our app, that allows each user to report any existing vehicle damage before starting the rental. This is useful not only for maintenance and restoring damages but also for pursuing

claims against the person responsible for the damage. Annually, there are thousands of minor damages, of which a high percentage is covered by penalties applied to users.

What could help car sharing grow faster in Italy?

Shared mobility significantly contributes to decongesting cities and provides a meaningful response to the structural parking shortages in our historic centers. For this reason, sharing operators can assist local areas. Clear rules are needed to support this challenge, and incentives for using sharing, similar to what happens in Emilia-Romagna, could play a crucial role.

In Bologna, Ferrara, and Imola, all public transport subscribers receive an automatic coupon of €10 for each rental, making sharing almost free for monthly and annual public transport subscribers. This has been possible, and continues to be, thanks to a decision by the Emilia-Romagna Region—who approved a TPER project—for all 2024, supported by resources from the National Transport Fund. We hope this project will be funded in the coming years and become a best practice to be shared at the national level. Our experience is very positive and demonstrates a clear acceleration in intermodality and the modal shift from private cars to more sustainable transport.



Rory Brimmer

Business Development
Director, UK

Turo

European markets: UK & France

Launched in 2009 as RelayRides, Turo now claims to be the world's largest car sharing marketplace with 365,000 vehicles on its platform worldwide.

The service is currently available in the United Kingdom, France, the US, Canada and Australia.

turo.com

Please describe the European arm of Turo and what has been your journey so far?

Turo was founded in 2009 in the United States, originally as Relay Rides. In September 2018, Turo launched in the UK, expanding its operations outside of North America for the first time. In 2022, Turo expanded to France via the acquisition of OuiCar (one of France's leading peer-to-peer car rental companies). We are proud to say that most OuiCar customers chose to migrate to the Turo platform in November 2023, with a smooth transition between the two platforms for both hosts and guests.

As of June 30th 2024, hundreds of thousands of people across Europe are using Turo to access a car and tens of thousands of European car owners are sharing their car on Turo. As we continue to build our European footprint, whilst providing extraordinary selection and unrivalled convenience to our Turo community, we are excited to play our part in putting the world's 1.5 billion cars to better use.

How would you describe a typical Turo user in the UK and France? On the other hand, who is your typical car owner?

There's no such thing as a typical guest on Turo, and that's our ambition: to offer each person the specific vehicle they want to rent, for every occasion. Turo can help you find the perfect car for a holiday, enable you to try out your dream car for the day, or assist you in moving house with a wide range of vans. We also see guests renting cars for

extended test drives, or for business travel. We have guests of all ages and income levels, who can find vehicles to suit their budget.

As for our hosts, we have the majority who typically share one or two cars with the goal of offsetting car ownership costs. Then we have small business hosts who share more dedicated vehicles to supplement their income or make it their main activity. With this entrepreneurial endeavour, they are able to rent out their vehicles all year round, often experiencing peaks in traditional holiday periods.

Keyless access is a P2P market trend. What are your own experiences with it and how would you describe the potential of keyless access?

Many of our hosts on Turo offer keyless access due to the flexibility it offers to both sides of the marketplace. The major advantage for the guest is that they can reserve the vehicle, unlock it, and drive it away without any time constraints and without having to agree a specific time with the host. This is perhaps helpful for a family with children who may be running late, or someone on a tight schedule with a plane to catch.

As for the host, they can offer vehicles for rental that are available for pick up 24 hours a day, allowing them to receive more bookings, especially during hours when they are not physically available to hand over the keys. The meeting of this need for flexibility and this opportunity for increased rentals is the reason for keyless access becoming a market trend. Of course, some guests and hosts prefer to meet each other before the trip, exchanging advice and getting to know each other,

but for many the option to unlock the vehicle remotely is a welcome feature.

What are current high-demand vehicle types that you'd like to see more of on your platform?

In France, most searches and bookings are for recently released city cars, but we are seeing a real demand for minivans and large station wagons for long-term rentals. Last year in the UK, our top-booked models were Mercedes-Benz (A-Class and C-Class), Volkswagen Golf, and BMW (1 and 3 Series). Whilst we have plenty of these on the platform, increasing supply to satisfy the demand during popular months is always in our interest.



Ernesto Mateo Hernández

General Director

Voltio
Spain

Voltio is a Spanish free-floating car sharing service. They are backed by Mutua, a Spanish insurance company. They run a fleet of more than 600 electric cars. They operate a fleet of more than 600 electric vehicles, making them one of the all-electric car sharing operators in Europe.

voltio.com

Why is the Spanish car sharing market one of the most electrified on the continent? What is Voltio's perception of this megatrend?

The carsharing market in Spain is one of the most electrified due to the collaboration between public institutions and private companies to promote efficient and sustainable urban mobility alternatives. The expected sustainable mobility law by the Spanish government would provide a regulatory framework that facilitates addressing mobility and transport needs, tackling challenges such as sustainability and digitalization. The government has approved the sustainable mobility law and sent it to parliament to begin the parliamentary approval process.

Madrid is a notable example, with a high population density and an excellent public transport offer that complements carsharing. The city has implemented regulations that progressively restrict the use of polluting private vehicles, favoring carsharing. Additionally, most carsharing trips in Madrid are made in 100% electric vehicles, which represent 65% of the total fleet, reaching 86% when including plug-in hybrids.

Voltio, a company committed to sustainable mobility, operates a fleet of more than 600 100% electric cars, which can circulate without restrictions and park for free in regulated areas and exclusive carsharing spaces. This strategy has allowed Voltio to avoid the emission of more than 1,300 tons of CO₂, recently celebrating its one-millionth trip.

Madrid's car sharing ecosystem stands out in Europe and is very competitive. How can operators differentiate themselves?

Madrid's carsharing ecosystem is one of the most advanced in Europe. Operators can differentiate themselves by specializing in specific offers or customer segments. Our goal is to become the number one carsharing service in Madrid in 2025. We also aim to lead in service quality, with customers praising the condition of our vehicles and our customer support.

To cater to diverse needs, we offer a variety of products. For instance, we provide the best hourly rental options, and an exclusive service called "Voltio a casa". This service allows users to take the car home after work, regardless of where they live, and return it to the city the next morning at a very advantageous price. Frequent users can purchase "Bonovoltios" to save significantly on their trips. Additionally, we are developing new products that we plan to launch before the end of the year.

What convinced Mutua, a well-known Spanish insurance company, to invest in car sharing?

Mutua decided to invest in car sharing with a strategic vision in mind. Their objective is to have a service that serves as a testing ground for innovative digital and service solutions. This initiative aims to attract younger generations and customers who do not own a car.

Mutua aims to leverage this car sharing service to experiment with and refine new technologies and service models, ensuring they stay at the forefront

of the evolving mobility landscape.

Moreover, Mutua is committed to maintaining its renowned high standards of quality and service in this new venture. They see car sharing not just as a business opportunity, but as a way to uphold and even elevate their reputation for excellence. This investment aligns with their broader strategy of innovation and customer-centricity, ensuring they continue to meet the needs of modern consumers in a dynamic market.

What is the role of Mobility-as-a-Service (MaaS) in Madrid? What role does it play for you at Voltio?

MaaS will play a crucial role in Madrid, as it does in other major cities, due to the multimodal nature of urban mobility. Users often combine various modes of transport, such as public transit, carsharing, biking, and walking, to navigate the city efficiently. MaaS platforms are continuously evolving to integrate these diverse services, offering seamless and convenient mobility solutions.

In Madrid, the development of MaaS platforms is particularly significant. These platforms aim to unify different transport services, both public and private, into a single accessible interface. At Voltio, we recognize the importance of being part of this evolving ecosystem. Our goal is to integrate our 100% electric carsharing service into MaaS platforms to contribute to a cleaner, more sustainable, and efficient urban mobility landscape. By doing so, we aim to provide users with flexible and eco-friendly transport options that complement other modes of transport.



Mariona Bosch

Vice President Programs
and Engineering Operations



Justin Spratt

Chief Business Officer

Vay

Vay develops automotive-grade technology for remote driving, paving the way for sustainable and driverless mobility services through a new form of car sharing. In February 2023, Vay became the first company to operate driverless on European public roads, and by January 2024, it launched its first commercial mobility service in Las Vegas, USA. They raised a USD 95 million Series B funding and in 2024, received an additional EUR 34 million from the European Investment Bank (EIB).

vay.io

A recent Techcrunch article said “Vay isn’t a traditional ride-hailing or car-sharing startup”. How would you describe Vay and how much car sharing DNA do you have?

Mariona Bosch: Vay combines the services offered by traditional car-sharing services with innovative automotive-grade teledriving technology to create a sustainable, door-to-door, driverless mobility solution. Vay users can book a car through the Vay app, similar to requesting a car-sharing vehicle. However, unlike traditional car-sharing companies, Vay eliminates the need to spend time searching for a nearby car or a parking spot. At the same time, it still provides users with the convenience and comfort of driving a vehicle as if it were their own.

Can you tell us what makes Vay unique, and what is the user journey like?

Mariona Bosch: Vay’s unique advantage is having a human driver remotely controlling the vehicle in real time. With Vay, a user can request an electric vehicle through our app, and a trained teledriver remotely drives it to their location. Once the vehicle arrives, the user takes manual control and drives it like a regular car to their destination. After completing the trip, the user ends the rental in the app and exits the car without needing to park, as the teledriver handles parking or drives the vehicle to the next customer. This blend of human oversight and advanced technology offers a stress-free and flexible experience while also improving transport efficiency and traffic congestion in urban areas.

How does Vay view the current US and European policy landscape towards the technology?

Justin Spratt: We are pioneering the field of teledriving on public roads, something that has never been done before. As a result, there is no established blueprint for our work, and we must navigate the development of a regulatory framework step by step in close collaboration with the authorities. While regulatory hurdles in Europe require more time and cooperation to secure approvals, we are pleased to have initially launched our service in Las Vegas, where teledriving is explicitly permitted under Nevada law.

This allowed us to gather valuable data on customer demand, customer usage, and operating demands required to deliver a high quality service.

Interesting developments are underway across Europe, in particular, Germany and Belgium. We are actively working with the authorities in Hamburg and Antwerp to obtain the next set of approvals.

What is currently the biggest barrier to widespread adoption of teledriving in car sharing?

Justin Spratt: The only barrier to widespread adoption is regulatory uncertainty, most acutely in Europe. While we’ve made significant progress in Las Vegas and are confident in our technological capabilities, scaling commercially requires a clearer regulatory framework across regions.



Ersan Öztürk

Founder

TikTak

Turkey

The Turkish car sharing market serves as a bridge between Europe and Asia. TikTok operates a free-floating car sharing model in Turkey. Founded in 2021, the company started with a small fleet of 300 vehicles and has since grown to over 4,500 cars. It is one of the largest car sharing platforms in Turkey with over 2 million registered members. The company has completed more than 11 million rides and currently operates in key cities such as Istanbul, Ankara and Izmir.

[Tiktakkirala.com](https://www.tiktakkirala.com)

How has the Turkish car sharing market developed in recent years?

The Turkish car-sharing market has grown rapidly due to urbanization, high vehicle costs, and the need for flexible, on-demand mobility solutions. Cities like Istanbul generate 20% of the country's total mobility demand, making the market ripe for innovation. The market is primarily driven by local players, with international companies observing opportunities for entry. According to a McKinsey study, the total addressable mobility market (TAM) in Turkey is worth around \$55 to \$65 billion, or roughly 700 to 710 billion passenger kilometers traveled (PMT), with 20% of demand stemming from Istanbul alone.

Key players are expanding the market by introducing innovative services, pilot programs, and growing their fleets to attract new users seeking convenience and affordability. TikTok entered the market to address urban mobility challenges with a cost-effective alternative to car ownership. What sets TikTok apart is our focus on customer experience, scalability, and strategic use of data-driven insights to anticipate and respond to mobility trends, positioning us as leaders in shared mobility in Turkey.

Why has the free-floating car sharing model gained popularity in the Turkish market, and how does TikTok contribute to its growth?

The free-floating car-sharing model has gained attraction in Turkey due to its flexibility, allowing users to pick up and drop off cars within designated zones. It's ideal for urban environments, where car

ownership is costly and alternatives are limited. This model appeals to city dwellers seeking short-term, on-demand access to vehicles without the burdens of ownership, like maintenance and parking fees. TikTok has played a key role in popularizing this model by offering a seamless, tech-driven user experience. From a seamless app interface to real-time vehicle availability and cashless payments, we've focused on making car-sharing as convenient as possible. Our fleet's strategic distribution ensures that users have easy access to vehicles whenever and wherever they need them.

Additionally, TikTok's diverse service offerings—ranging from short-term, on-demand rentals to pre-booked daily options—give users the flexibility to choose the solution that best fits their needs. Whether it's a quick errand, a daily commute, or a weekend trip, TikTok provides a practical alternative, making shared mobility not just a backup option but a primary mode of transport for many. Its focus on accessibility, along with a diverse service offering that includes on-demand and pre-booked daily rentals, and a growing fleet across key cities, has driven adoption, making car-sharing a practical alternative for commuting, errands, and leisure.

What are specific challenges you observe in the Turkish market? How can the car sharing industry overcome them?

A key challenge in Turkish car sharing is limited public awareness. Many potential users are unfamiliar with the benefits, such as flexibility and cost savings. Another major challenge is infrastructure. In densely populated cities like Istanbul, parking availability is a constant struggle. Additionally, regulatory frameworks, including insurance, present

obstacles to expansion.

To overcome these challenges, the industry needs to focus on several key strategies:

- **Public Education and Awareness:** At TikTok, we engage communities through digital outreach, collaborations, and local events to showcase how car-sharing can simplify urban mobility and reduce costs.
- **Collaborating with Local Governments for Better Infrastructure:** Working closely with local authorities to develop solutions like designated parking zones or incentivizing shared mobility will be essential.
- **Enhancing Customer Experience:** To grow the user base, the industry must continuously refine the customer experience by leveraging technology and data. Simplifying the process for booking, accessing, and paying for car-sharing services, as well as providing reliable customer support, can build trust and loyalty. At TikTok, we invest heavily in our technology platform, making it seamless and intuitive, while prioritizing customer feedback to meet evolving needs.

By addressing these challenges through education, collaboration, regulatory advocacy, and a relentless focus on user experience, the Turkish car-sharing industry can continue to expand and unlock its full potential.

5

Trends

Our Top 5 European Car Sharing Trends

Top-level trends

Aggregated observations of the European car sharing space



Regional Business Model Focus

Historically older markets like Northern and Western Europe tend to have stronger station-based markets, whereas younger markets like Eastern and Southern Europe tend to focus on free-floating operations.

Examples:

- Switzerland, Norway and Ireland do not have any known free-floating services
- Large parts of Eastern Europe have no robust station-based services



Continued Electrification

Car sharing fleets are significantly more electrified than the private/ owned car fleets. Fleet electrification continues to grow in many countries. In addition, about 1 in 4 station-based and free-floating operators operate all-electric fleets.

Examples:

- Spark (Bulgaria, Lithuania)
- GreenMobility (Denmark)
- Zity (Spain, Italy)
- E+Share Drivalia (Italy, France)
- Avant2Go (Slovenia, Austria, Croatia)



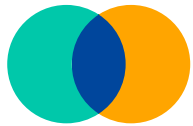
Profitability and operational excellence

Increasing profitability remains a key focus for some operators, especially in the younger free-floating and peer-to-peer markets.

In addition, many operators are investing heavily in improving and partially automating an increasing number of processes to prepare for further increases in fleet size and utilization.

Top-level trends

Aggregated observations of the European car sharing space



Joining forces

Prominent mergers and acquisitions in select free-floating and P2P markets. The free-floating and P2P markets are more dynamic than the station-based market. At the same time, all of this is happening in a growing market.

Examples:

- ShareNow merged with Stellantis' Free2Move (free-floating)
- Eastern European OxDrive was acquired by CarGuru (free-floating)
- P2P operator goboony was acquired by yescapa
- P2P operator PaulCamper was acquired by camplify



Emerging technological solutions

If you compare the historical evolution from manual key handovers, to key safes, to access cards, to app-based vehicle access you'll see that innovation is in the DNA of the car sharing industry. Technological innovation has been a constant driver of car sharing's success. Select new tech trends include teledriving pilots and AI-based damage detection.

Examples:

- Belgian free-floating operator Poppy announced a teledriving pilot that delivers and/or picks up the vehicle before/after the rental and drive.
- AI-based damage detection implemented by many operators

6

Summary

Main takeaways

Summary (1/2)

Key insights from the report

European car sharing saw significant growth last year, with over 580 operators identified across 39 countries.

The European fleet size increased by 14% last year (free-floating + station-based). For the first time, Europe's free-floating car sharing fleet has surpassed the station-based fleet, with an estimated 63,000 free-floating vehicles and 57,000 station-based vehicles on the continent. This marks the largest market we've ever recorded for both business models.

The top five combined free-floating and station-based markets are Germany, France, the Netherlands, Belgium, and Italy. Among these, Belgium and Germany boast the highest car sharing density, with more than 5 vehicles per 10,000 inhabitants.

Quantifying the size of the peer-to-peer fleet is more challenging. We've identified over 35 European operators. Together they account for an aggregated fleet size in the six-digit range. For instance, Turo reports a global fleet of 365,000 vehicles (including non-European markets), while Getaround has 75,000 active vehicles available for rental worldwide.



Summary (2/2)

Key insights from the report

Millions of users have registered for car sharing services, and local data from our country profiles indicate that the customer base continues to grow.

In station-based and free-floating car sharing alone, we identified more than 360 different vehicle models by more than 55 car brands. Peer-to-peer car sharing naturally has an even wider vehicle model diversity.

Top level market trends:

- There are different regional strongholds for the three car sharing business models we analyzed
- Continued fleet electrification in many markets
- Profitability and operational excellence
- Selected acquisitions and mergers especially in the free-floating and peer-to-peer markets
- Evolving technological solutions



7

About and Sources

Who is INVERS and reading tips

About INVERS

Who we are

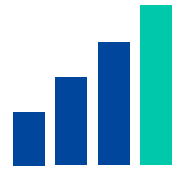
INVERS enables car sharing operators to launch and operate fleets at scale with integrated hardware and software solutions. As the inventor of automated vehicle sharing, INVERS is developing and reliably maintaining the fundamental building blocks to offer its customers cost-efficient and easily implementable technical solutions.

The company acts as an independent and reliable partner for operators of services such as car sharing, rental and car subscription services with the vision to make the use of shared vehicles more convenient and affordable than ownership. Customers include Cambio, Flinkster, Free2Move, Getaround, Miles, MyWheels and Zity. The company was founded in 1993 and has locations in Siegen (Germany), Cologne (Germany) and Vancouver (Canada). The development takes place entirely in Germany.

www.invers.com

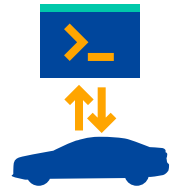
Start and scale your car sharing

Connect your fleet, automate your rentals, and secure profitability on the INVERS platform



Secure reliable connectivity for your fleet

Make any vehicle shareable on the INVERS platform and benefit from lightning-fast response times anywhere in the world.



Automate rentals for maximum efficiency

Scale your business and create a seamless customer experience with a digital, keyless rental process and remote control over vehicle functions.



Protect your cars with real-time insights

Receive real-time alerts for dangerous incidents and bring transparency into rentals to keep your fleet and your revenue secure.



Optimize operations to drive profitability

Minimize vehicle downtime, guarantee successful rentals, and increase fleet utilization with our growth-oriented tool stack.

Contact our experienced sales consultants to discuss your needs

Talk to our shared mobility experts

Other free INVERS reports and white papers that you will enjoy reading



Car Sharing in North America

(50 pages)

Why read it?

- A white paper with full focus on the car sharing marketing in the USA, Canada and Mexico.
- 50 pages full of insights, expert interviews and trends from this market.
- Best approach to understanding the local market.

[Read the White Paper](#)



Microcars in European Carsharing

(35 pages)

Why read it?

- Discover the eight current countries with microcars in car sharing.
- Explore nine featured microcar models.
- 17 from 550+ European operators use microcars. Find out how and why.

[Read the White Paper](#)



Large Vehicle Sharing in Europe and North America

(33 pages)

Why read it?

- Get first insights into the European and North American market on LCVs and MPVs such as vans, transporters or RVs
- Get an overview of major key players in this dynamic market
- Learn about use cases like moving, IKEA, heavy transport, vacation, group rides, or corporate use

[Read the White Paper](#)

INVERS webinars: Exploring car sharing expertise

Unlock valuable insights with industry experts

Growing and Scaling Car Sharing Fleets - Lessons Learned

- Key considerations before scaling
- Identify signs that your telematics systems might be holding you back
- Keeping the total cost of ownership and operations low

Speakers:

- **Kinto** (Jason Zahorik, Group Manager)
- **Kinto** (Jimmy Ouyang, National Manager)
- **INVERS** (Chris Anderson, Sales Director)

Watch the webinar

Advanced data for shared mobility operations

- How to generate and use data to identify and reward vehicle-friendly driving styles and behaviors
- Why effective data visualization tools improve accident and incident response times and investigations

Speakers:

- **MILES** (Nitin Maslekar, Head of Product and Technology)
- **INVERS** (Christoph Müscher, Product Management)
- **INVERS** (Christoph Müller, Field Application Engineer)

Watch the webinar

Crucial Lessons from Growing Shared Mobility Operations

- North American perspective
- The pros and cons of running your own operations vs. contracting it out
- What you need to know about the market you're entering, and how much time is needed to plan before launch

Speakers:

- **movmi** (Sandra Phillips, Founder & CEO)
- **Mondofi** (Leigh Angman, Founder)
- **INVERS** (Chris Anderson, Sales & Partner Manager)

Watch the webinar

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<https://go.invers.com/en/resources/invers-mobility-barometer-european-car-sharing-2024>