



# Welcome to Market Exploration on Shared Mobility

We start at 9:30 am



# Welcome

*Opening by projects owners from the Capital Region of Denmark  
and Region Zealand*

# Program

**9:35-10:10 Introduction to today's agenda** and short presentation round for shared mobility providers and suppliers

**10:10-10:30 Projects' content and ambitions:** The Connected Journey

**10:30-10:50 Projects' content and ambitions:** Shared Mobility along the Greater Copenhagen Light Rail

**10:50-11:00** Coffee break

**11:00-12:00 Dilemma-workshop** Shared Mobility along the Greater Copenhagen Light Rail

**12:00-12:40 Lunch** and networking.

**12:40-13:40 Dilemma-workshop:** The Connected Journey

**13:40-13:45** Coffee break

**13:45-13:55 Insights** and review of newly emerged themes

**13:55-14:20** Presentation of possible **tender designs and timeline** of the two projects

**14:20-14:30 Rounding off**

**14:30-15:00 B2B Matchmaking** – meet your new business partner (*optional*)

An hourglass with orange sand is centered on a wooden shelf against a teal background. The sand is flowing from the top bulb to the bottom bulb. The text is overlaid on the image.

Max 2 min!

1. Present yourself & your company
2. Present the shared mobility solution you provide

# Projects' content and ambitions: The Connected Journey

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**Interreg**



Medfinansieret af  
Den Europæiske Union

Öresund-Kattegat-Skagerrak

# Project ambitions and partners

2023 – 2026

- A connected shared mobility service linking major nodes and companies/organizations
- Combines public transport with the flexibility of sharing and micromobility
- Business models for sharing and micromobility services

Project Partners:

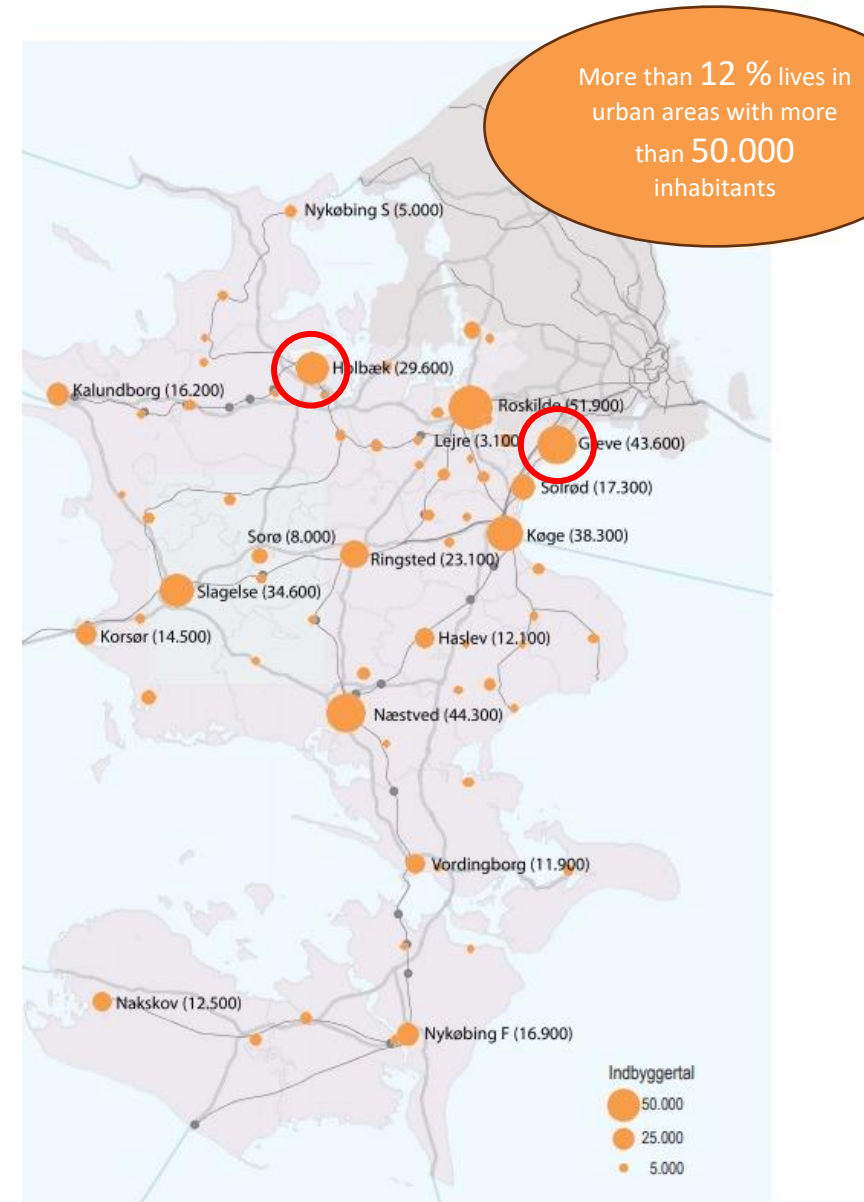


Collaboration Partners:



# Two nodes in Region Zealand

- Region Zealand's commuters drive the longest of all in Denmark.
- The competitiveness of public transport is improving
- Attractive last-mile solutions between major corridors and other infrastructure are important



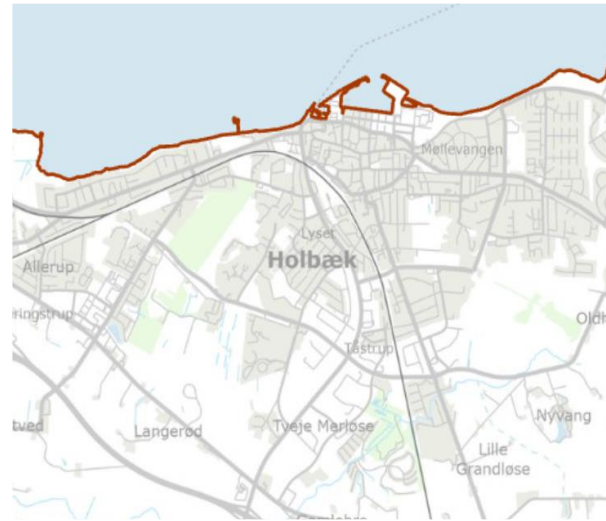
Mobility analyses for Region Zealand (2022)

## Holbæk Municipality



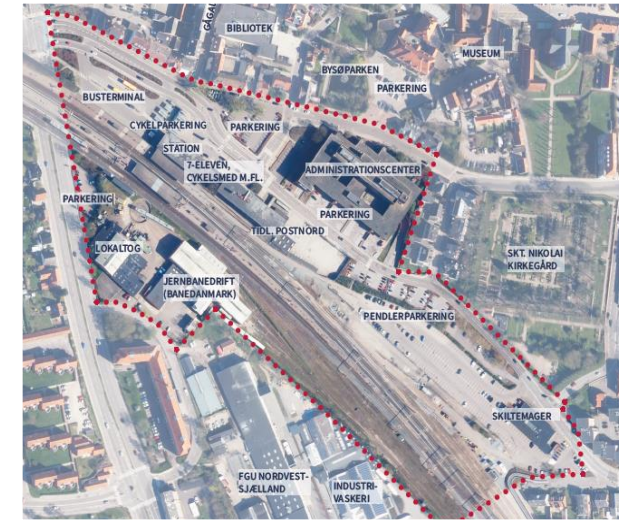
- To day: 74.000 inhabitants
- 2030: 77.300 inhabitants

## City of Holbæk



- To day: 30.600 inhabitants
- 2030: 33.500 inhabitants

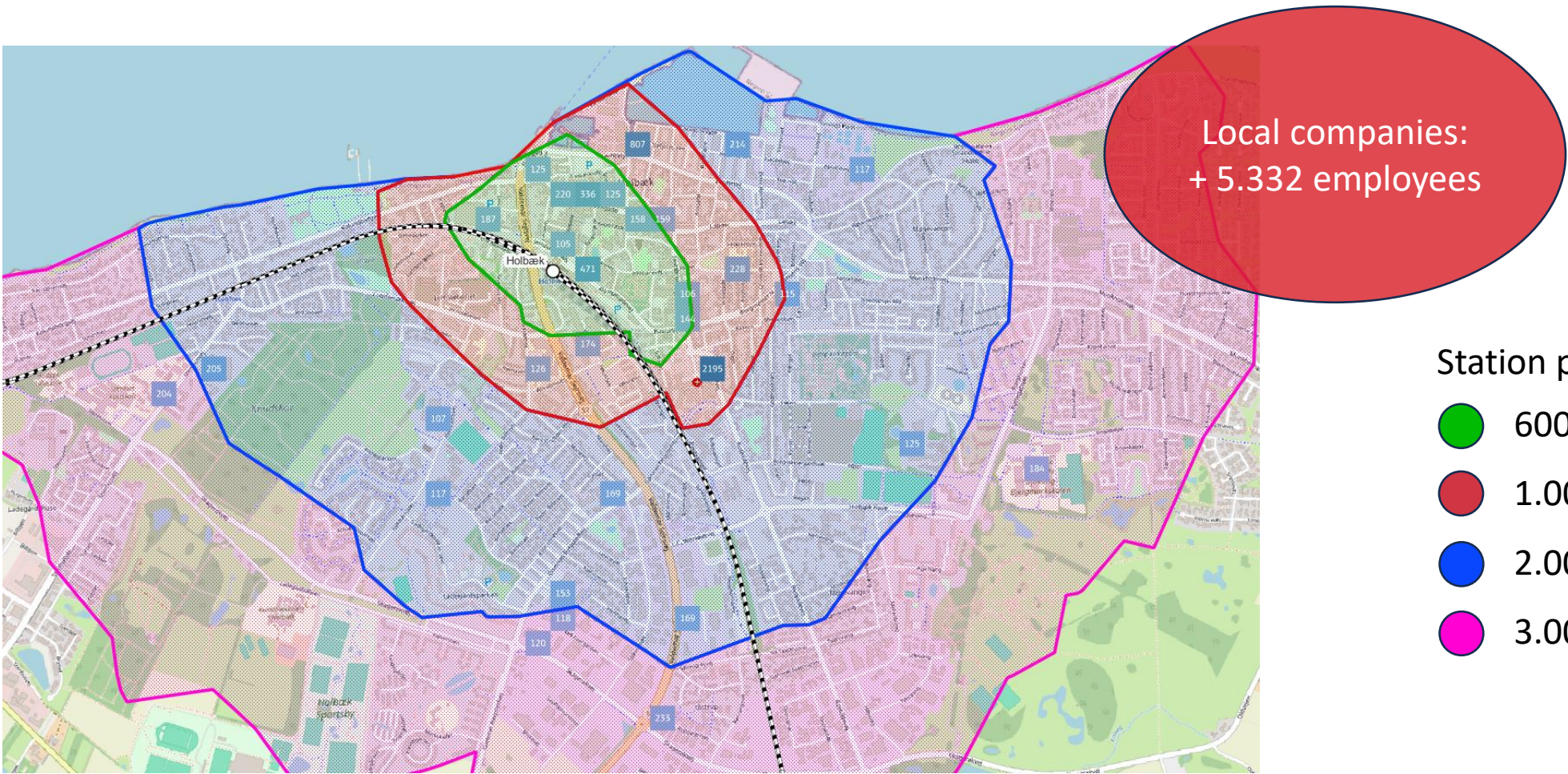
## Station-area



- New homes
- New town hall
- Rethinking the station-area

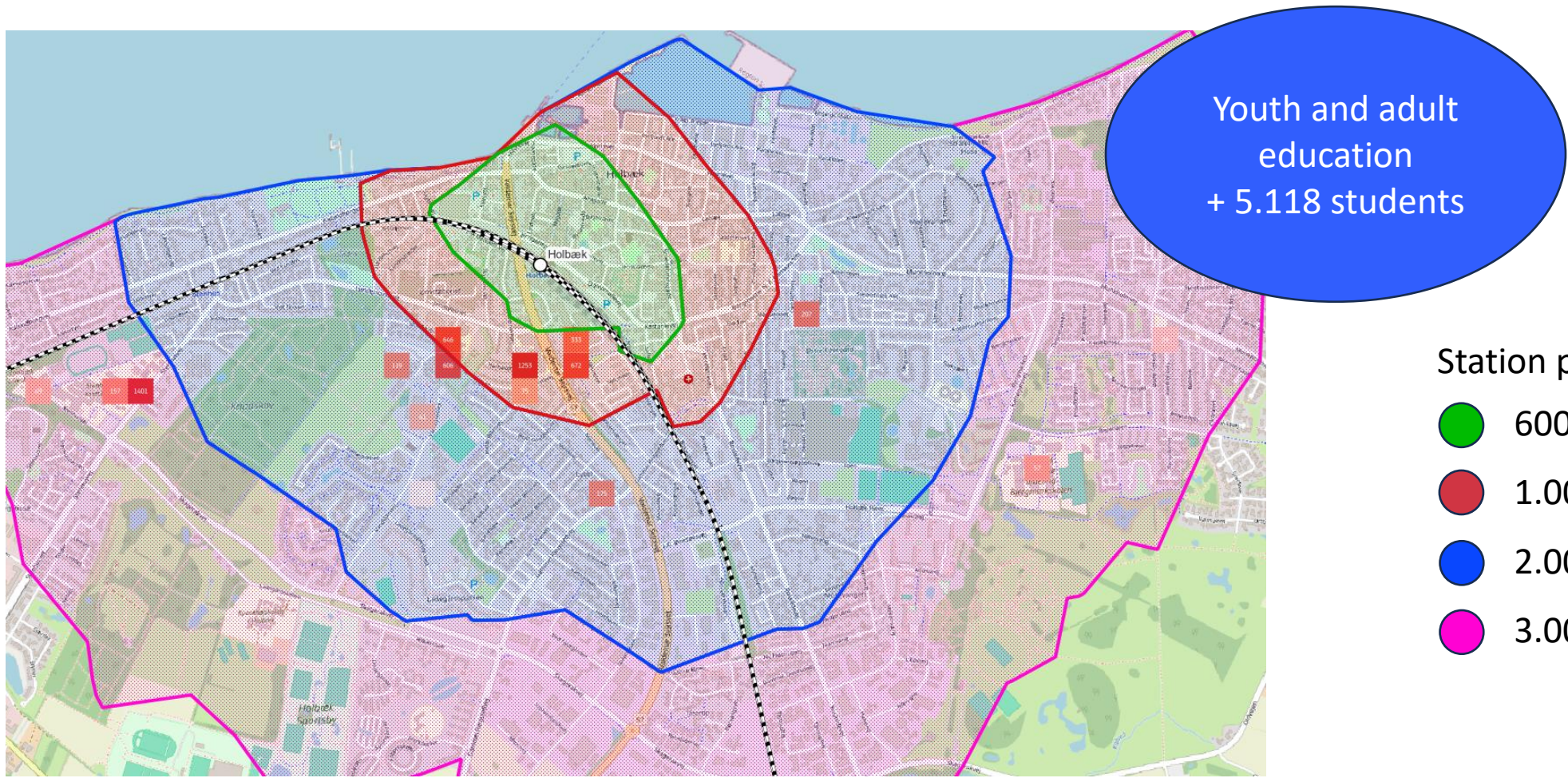


# Zoom-in: Holbæk Station proximity



The map shows the 100 x 100-meter quadrants where there is a minimum of 100 employees (Statistics Denmark 2022)

# Zoom-in: Holbæk Station proximity

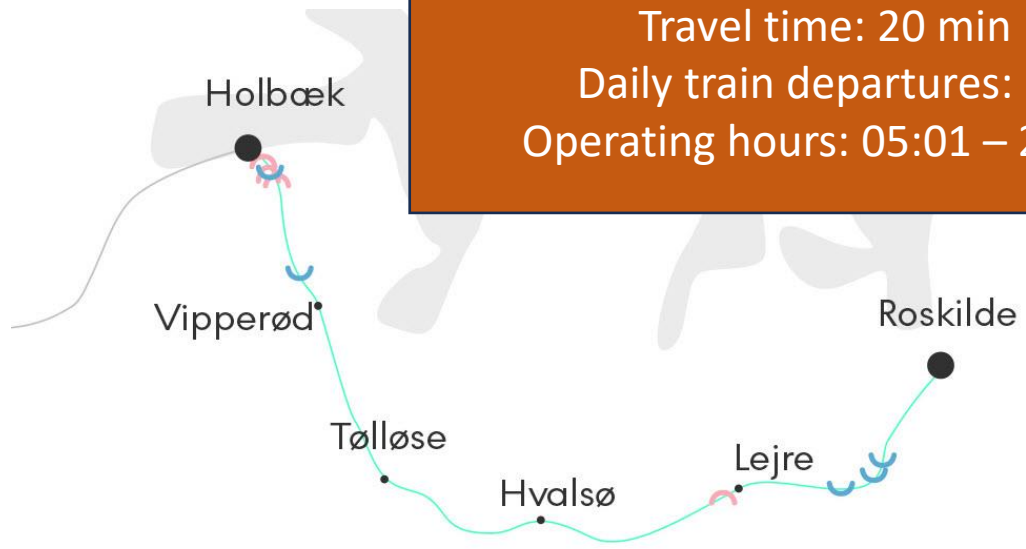


- Station proximity:
- 600 m
  - 1.000 m
  - 2.000 m
  - 3.000 m

The map shows the 100 x 100-meter quadrants where there are student at least 15 years old (Statistics Denmark 2022).

# Last-mile potential for Holbæk St. (initial analysis)

Holbæk <-> Roskilde  
Travel distance: 25 km  
Travel time: 20 min  
Daily train departures: 54  
Operating hours: 05:01 – 23:01



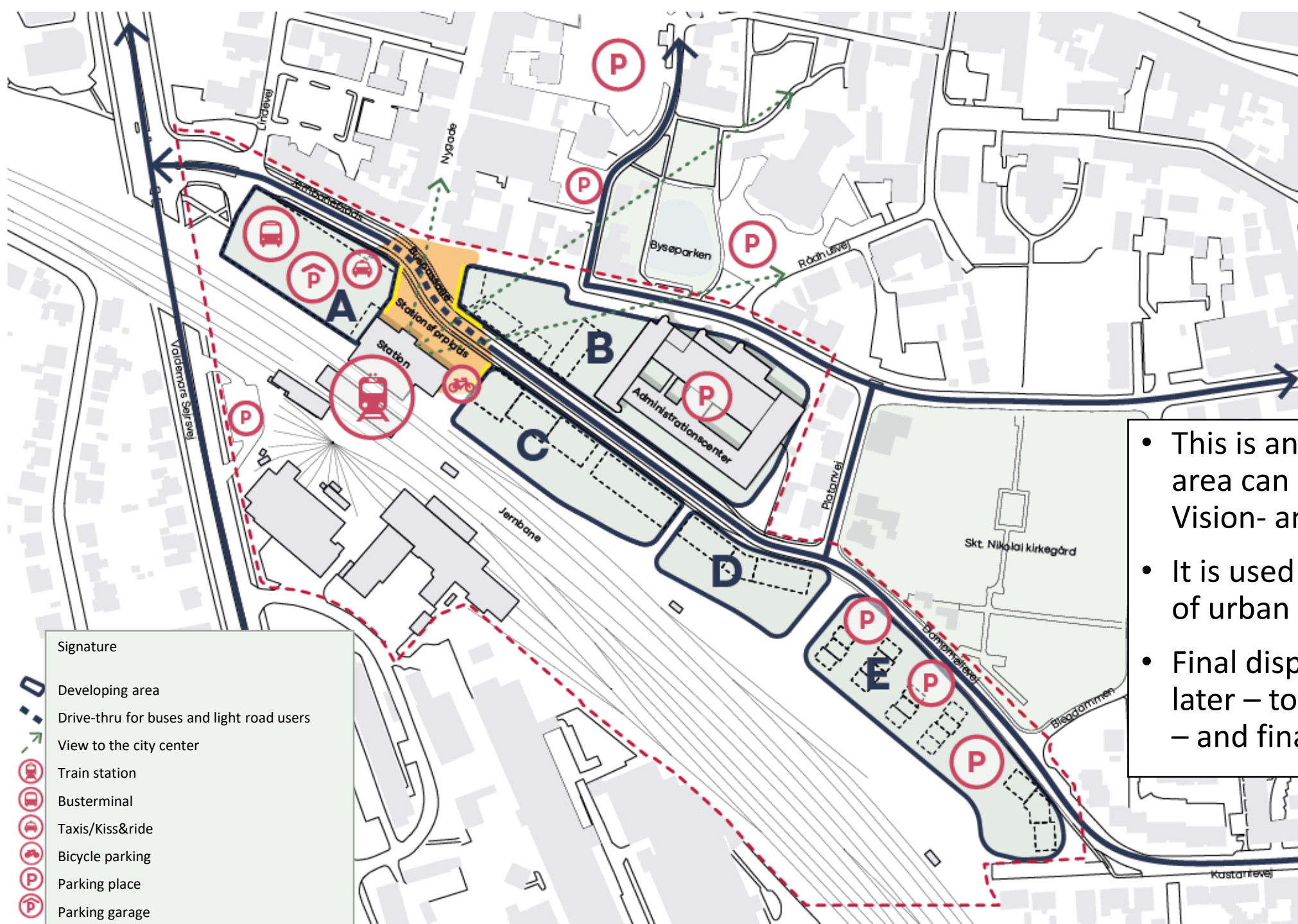
Commuter needs to Holbæk st.  
(600 – 5.000 m from station):  
1.414 persons

# Vision for Holbæk station transformation

- Easy and convenient to switch between modes of transport
- Cars take up less space – no drive-through
- Space for both everyday transit and for events
- Direct connection between the station and Nygade
- More densely built - with high quality
- Mixed functions and activities
- Welcoming and inspiring



# A development scenario



- This is an example on how the area can be developed in the Vision- and Development Plan
- It is used to calculate the value of urban development
- Final disposition is determined later – together with a developer – and finally in the planning

# The next transformation steps...



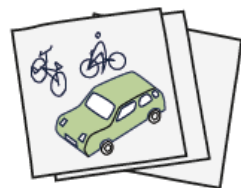
Noise surveys of railways



Project for (new) administration center



Dialogue with DSB and Movia



Traffic Analysis



Retail Analysis



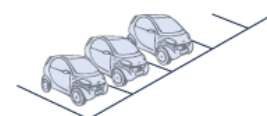
Sustainability Strategy



Application regarding safe station



Application regarding safe station



Parking Analysis

This is what we are going to work with:

- How to handle the consequence of the traffic restrictions
- Noise reduction for the neighbors
- Parking norms and parking garage

# We are keen on...

- 1 Supporting user involvement
- 2 Developing business models for shared mobility
- 3 Collaborating through dialogue and reflections



Projects' content and ambitions:  
**Shared Mobility along the Greater  
Copenhagen Light Rail**



# Shared Mobility along the Greater Copenhagen Light Rail

(Delemobilitet i forstæderne langs Ring 3)

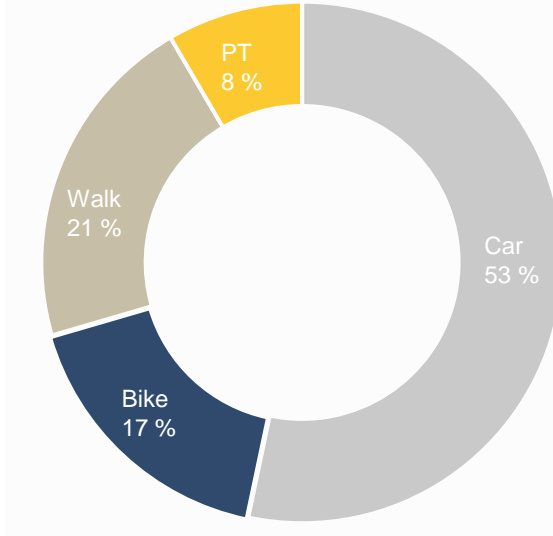
Regional development project 2023-2025

Case area: Municipalities along the Ring 3 corridor

# Mobility in suburbs around Copenhagen



## Modal split in the suburbs



Data fra Transportvaneundersøgelsen 2012-2022,  
Transport Survey DTU

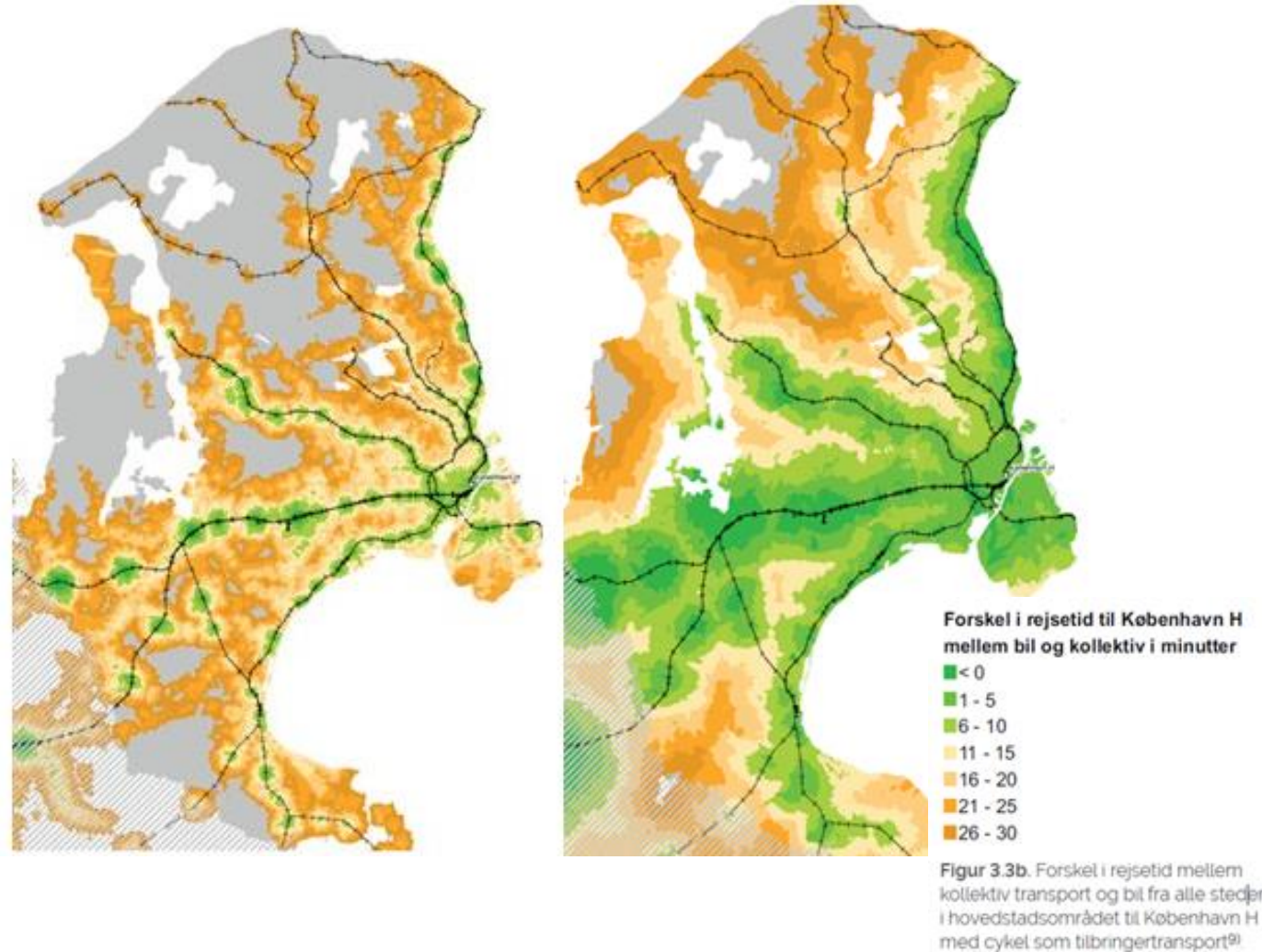
- The preferred mode of transport is car
  - 53% of trips are by car
- Public transport doesn't bring passengers all the way to their destination
- Shared mobility is limited and scarce outside the central urban areas
- Travels are often made across municipal borders

# Aim of the project

The Copenhagen Light Rail will upgrade public transport across the suburban areas.

By testing and implementing shared mobility, we provide a combined improved mobility system.

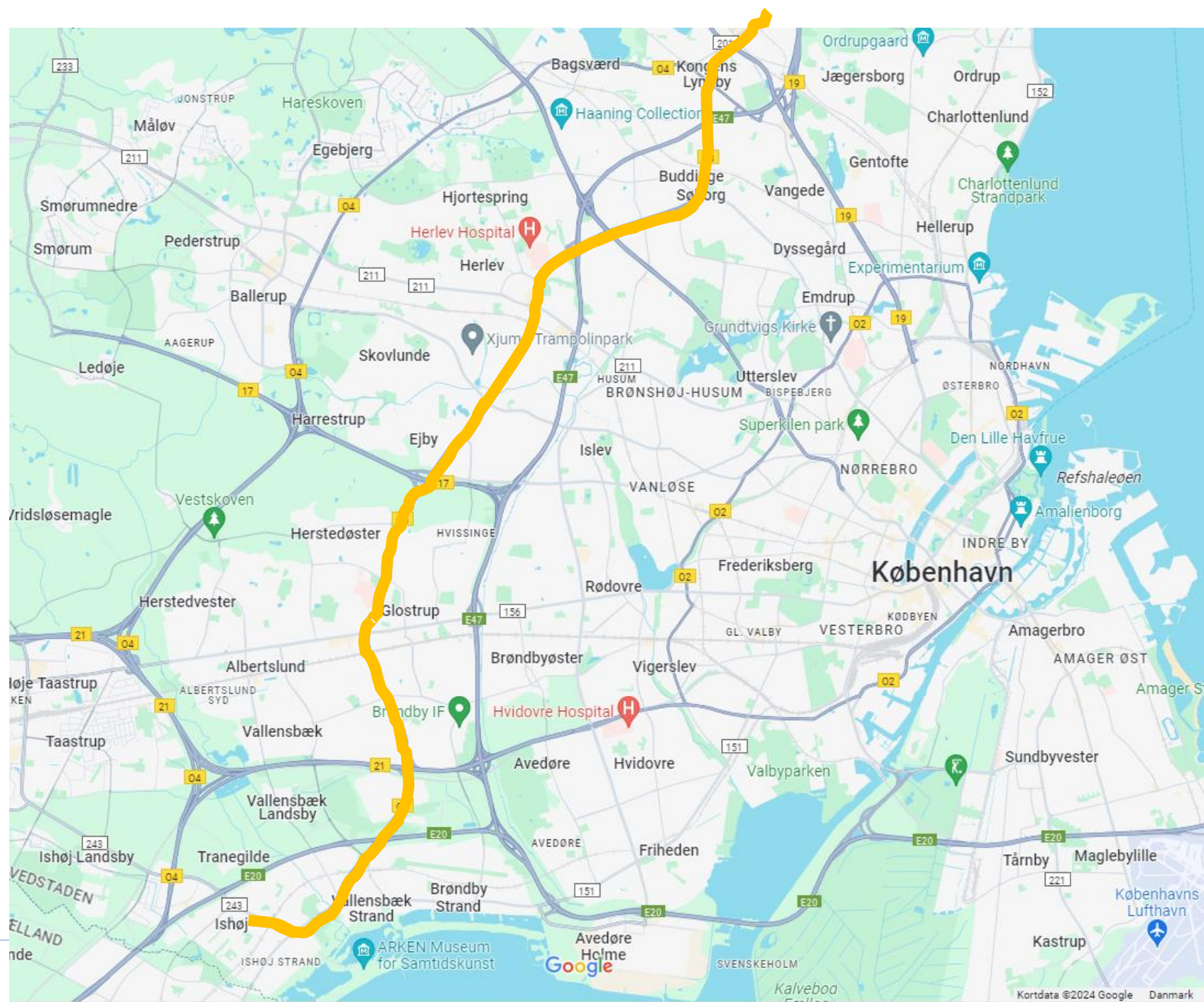
- Increase in multimodality trips
- Increased use of public transport
- Increase in bike rides
- Expand the target group of shared mobility



# Test area

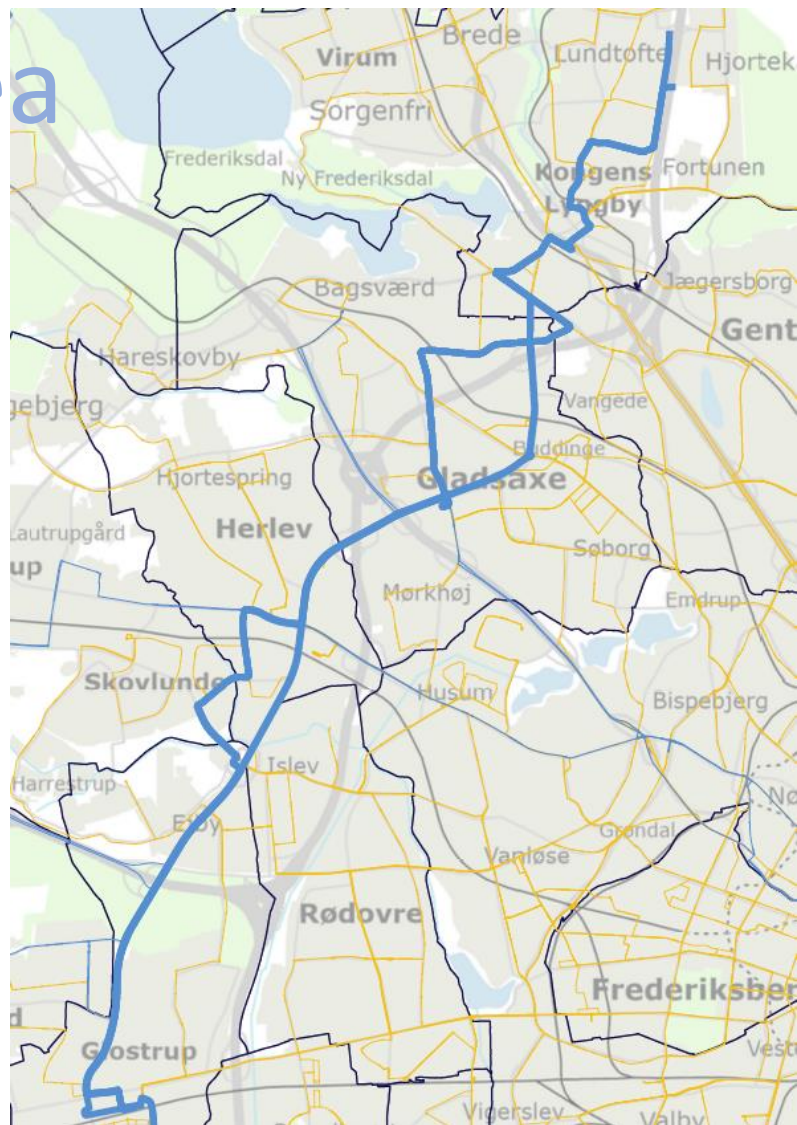
Test area is along the Ring 3 road which run in the suburban areas around Copenhagen.

Copenhagen Light Rail will upgrade public transport across the suburban areas.

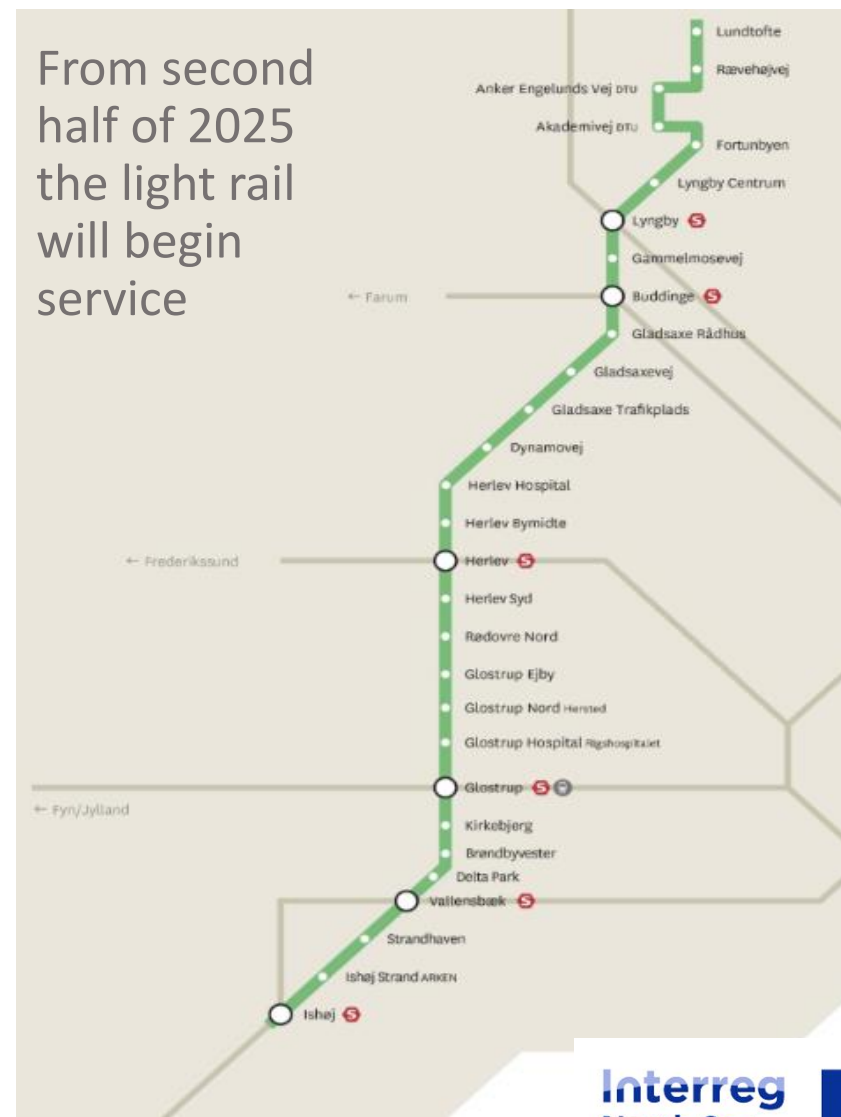


# Test area

In the test period bus line 300S operates in the corridor.



From second half of 2025 the light rail will begin service



Interreg  
North Sea



Co-funded by  
the European Union

# What is the aim of the project?

- Common dialog with provides
  - The Region, municipalities, business network and users.
  - Both before project start-up and during the test period.
- Test along the hole corridor at once
  - Connection to the public transport is important
  - Ongoing adjustments and adaptation based on user behavior, data and use
  - Test of e-scooters, bikes, e-bikes
  - Test of other types of mobility that can accommodate different user needs, e.g. tricycles
- Clarification of the model for agreements with private operators
  - Economically sustainable solutions



# What we achieve with the project:

## Effect

- A joint offer of shared mobility across the municipalities has been established
- Easier for citizens to use shared mobility
- Easier for the municipalities to handle tenders and dialogue with operators
- The providers are present when the light rail opens
- Common recognition and visibility at stops and stations
- More citizens use shared mobility, bus, train and light rail

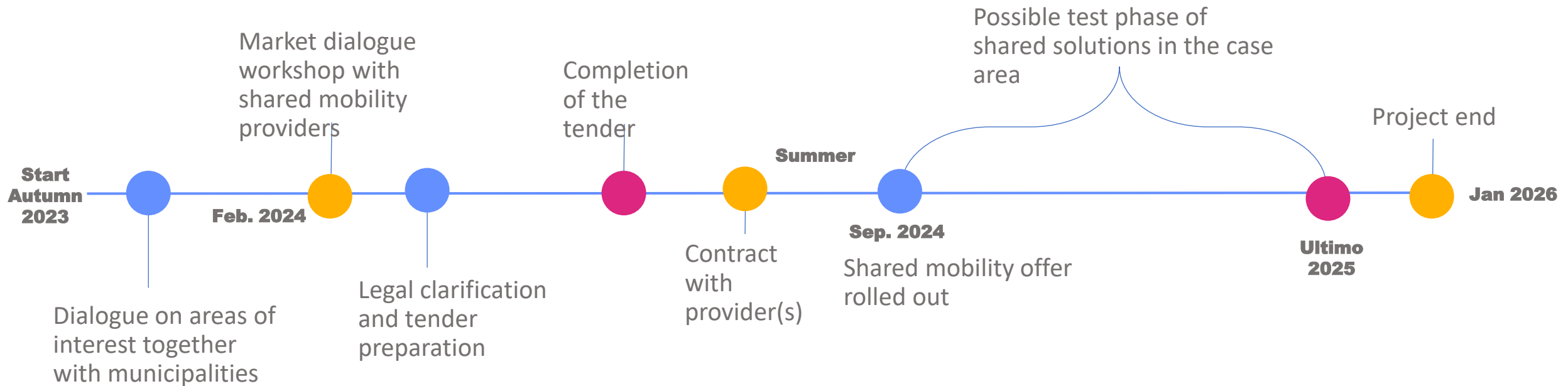


# Budget

- 3,7 mio. Dkk. for the test til tilskud til cykler og løbehjul
  - Bikes
  - E-scooters
  - tricycles
  - E-bikes?
- Distributed in each municipality
  - Flexibility in terms of continuous adjustment of locations and number of bicycles



# Expected timeline



A high-angle, close-up photograph of two blue ceramic coffee cups filled with latte. The cup in the foreground is in sharp focus, showing a detailed leaf-shaped latte art design on the surface of the milk foam. The second cup is slightly out of focus in the background. Both cups are placed on matching blue saucers. The entire scene is set on a rustic, light-colored wooden table with visible grain and knots. The lighting is warm and soft, creating a cozy atmosphere.

Coffee break



**Dilemma-workshop:  
Shared Mobility along the Greater  
Copenhagen Light Rail**

## Shared Mobility along the Greater Copenhagen Light Rail

The project aims to promote the use of shared bicycles and e-scooters in 9 suburban municipalities. However, the varying sizes, geographies, and target demographics of these municipalities create different conditions for establishing shared mobility solutions.

As an example, in Herlev Municipality, there is limited physical space near public transportation, along with additional challenges related to the construction of the Greater Copenhagen Light Rail.

- *How do we ensure good coverage across the 9 municipalities, and how wide can we extend the coverage to include the municipalities?*
- *How do we ensure a successful project while the construction of the light rail, including stations and station surroundings, is ongoing?*
- *How do you see the opportunity to integrate products targeted at alternative target groups?*



## Lunch break

### Rest of today's program

**12:40-13:40 Dilemma-workshop for the project:**  
The connected journey

**13:40-13:45** Coffee break

**13:45-13:55 Summary** and review of newly emerged themes

**13:55-14:20** Presentation of possible **tender designs and timeline**  
of the two projects

**14:20-14:30 Rounding off** and next steps

**14:30-15:00 B2B Matchmaking** (*optional*)



# Dilemma-workshop: The Connected Journey

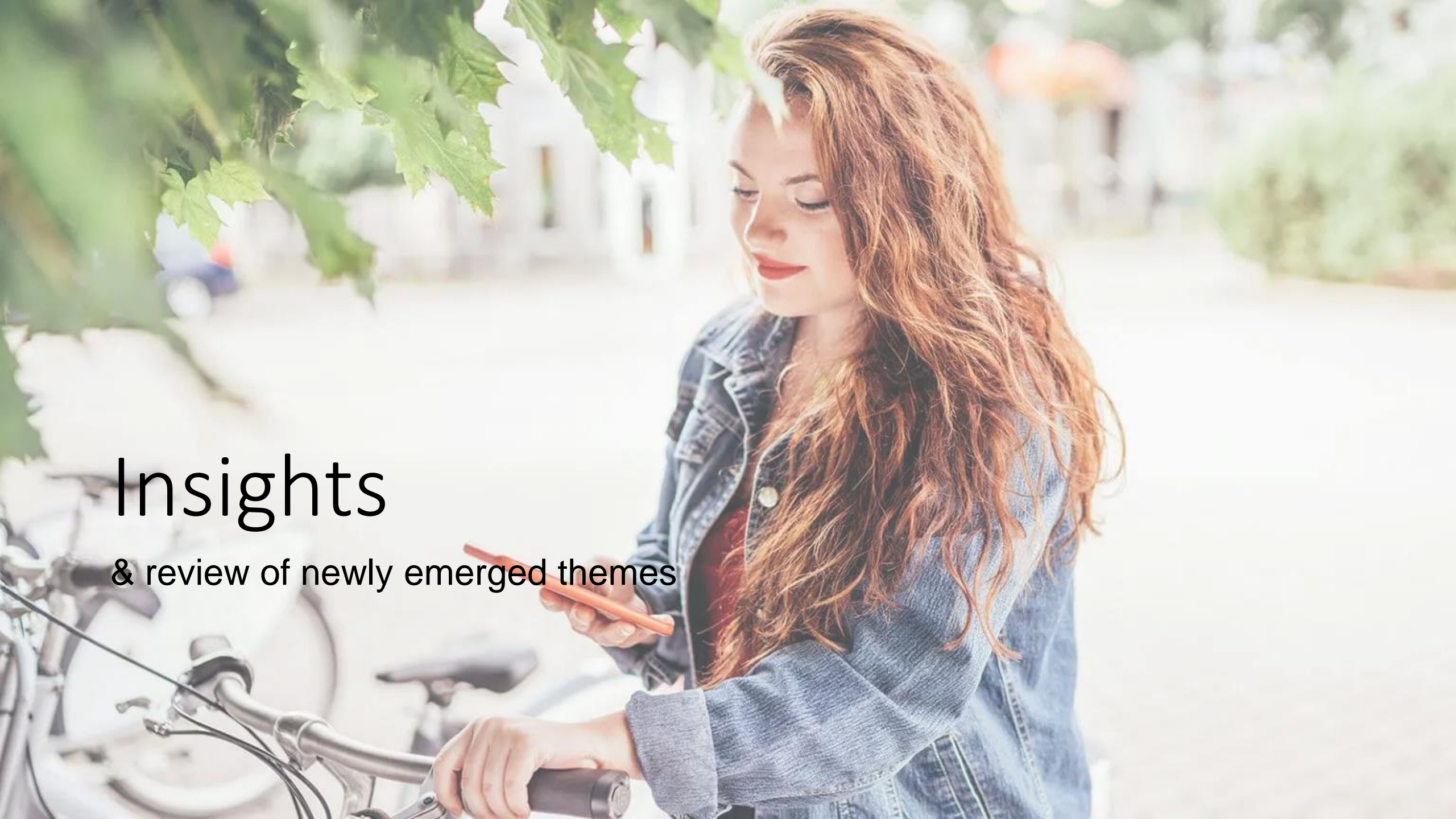
## The Connected Journey

In the catchment area around Holbæk station, there is a significant concentration of educational institutions for young people, which could be a destination for a shared mobility service. On the other hand, the willingness to pay among young people is very low, which could make it challenging to finance a solution.

*Young people in the target group (aged 15-24) are generally less willing to pay for shared mobility services.*

*A shared mobility solution targeting younger people (aged 15-24 years) cannot stand alone but must also involve other target groups.*

*We have good ideas for how the demand for shared mobility solutions can be established in the city of Holbæk.*



# Insights

& review of newly emerged themes





Possible tender designs  
and timelines

## Tender forms

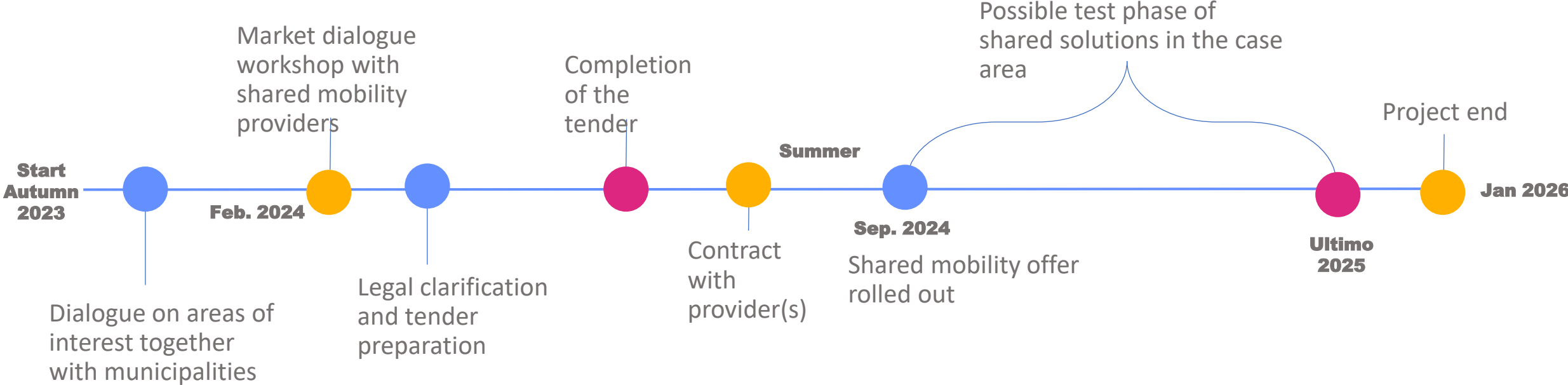


Negotiated tendering

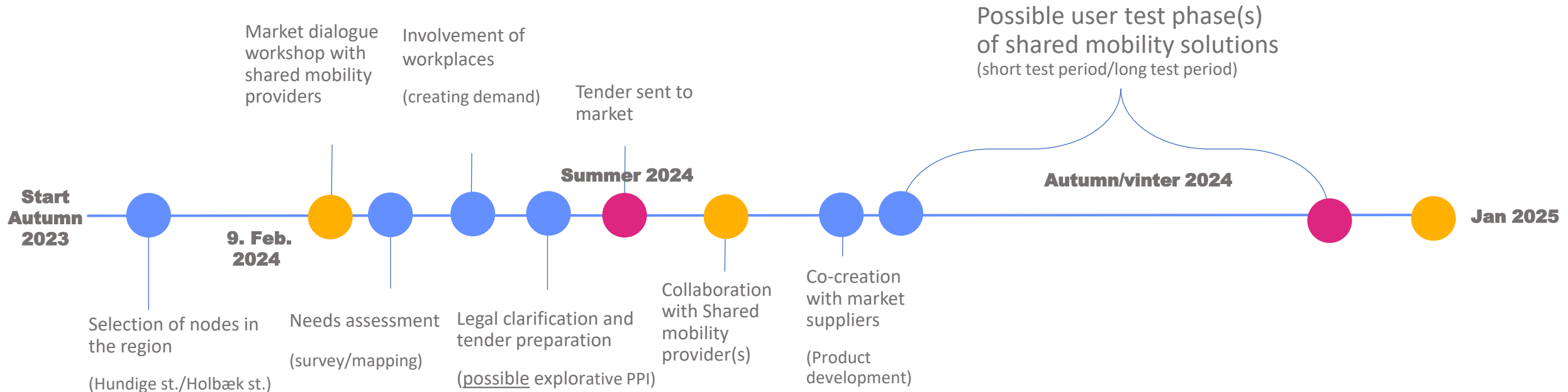


Public-private partnership (exploratory)

# Tentative timeline for Shared Mobility along the Greater Copenhagen Light Rail



# Tentative timeline for The Connected Journey in Region Zealand



Budget for service:

+ 0.8 million DKK for two municipalities/cases

Desired testing period: 12 months



Rounding off

**What were your key take-ways?**



**What are your top recommendations to the projects?**



# Key insights from the workshop across the two projects

## Procurement

- Aim to make the procurement process as smooth and efficient as possible. Consider creating a learning space for knowledge development within the procurement process, allowing for closer collaboration.
- Having numerous detailed requirements in a procurement process may not be beneficial. Instead, clearly define the goals and success criteria for the projects. Rather than describing the solution you want, focus on the issues you want to address. For example, if the goal is to reduce the number of cars in the city center, describe this issue and support it with data. This provides the best foundation for achieving success with a solution.
- It's essential for projects to be clear about who is responsible for what. If company involvement is crucial for the project's success, specify who will be responsible for that aspect. Marketing and investing time in cultivating local contacts can be costly.
- In the procurement process, we should consider how we want to advertise the solution and to what extent the market should be involved in this activity.

## Target audience and geography

- Hospitals and other large workplaces are generally good destinations, but they can also pose challenges in terms of flow, especially with electric scooters primarily being used in the morning and evening. There may be significant costs associated with rebalancing in this regard. However, internal mobility needs can be addressed to encourage usage throughout the day.
- When working in a large geographical area, it's essential to take a broader look at people's transportation behavior.
- It's recommended to target as broad of an audience as possible to cover the needs of different demographic groups at different times of the day. In principle, targeting multiple demographics leads to a better business case.
- When targeting younger people, it's relevant to be aware that the legal age limit in Denmark for using, for example, electric scooters is 15 years old. Some shared mobility providers require users to be 18 years old. Consider dividing the target audience for younger people into two groups: 1) 15-18 years old and 2) 18 years and older.
- To achieve success, it's wise to focus on existing users at the beginning of the trial period and then attempt to involve other target groups.
- Rebalancing the service can be very costly in a large geographical area.

## Key insights (continued)

### Data

- It is advised to include preliminary analyses (data in the procurement about users, etc.) so we can gain insights into what we're working with. For instance, if tourists are a desired target audience, include data about tourists to better assess the opportunities.
- Several operators can provide IoT and service for the tricycles in the project but won't invest in purchasing/leasing expensive tricycles themselves.
- Geofencing should be considered regarding the accessibility of the vehicles.

### Funding and Incentives

- The limited trial period of 1 year may limit the usage of the service. Typically, it takes longer to get people to use a new service (3 years +). Therefore, incentives are crucial!
- Incentive schemes are particularly important when it comes to younger users. This could involve discounts at different times or similar incentives to attract and retain them. Young people seem to be better at "saving points."
- In terms of funding, advertising revenue can contribute to the lack of user fees to some extent. However, be aware that in certain areas, municipalities may prohibit the use of advertisements, as is the case in Frederiksberg.
- There is generally openness to involving companies and working with B2B financing.
- Discounts can be provided for parking within geofenced areas at, for example, educational institutions.



Thank you for today!

Networking session until 3 pm.

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Öresund-Kattegat-Skagerrak

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North Sea Region  
European Regional Development Fund

EUROPEAN UNION



Region  
Hovedstaden

REGION  
SJÆLLAND  
*- vi er til for dig*

GATE  
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