



Innovation in Governance

A comparison of Bike-sharing Policy between China and Hong Kong

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- ▶ **Bike-sharing Evolvement**
- ▶ **Comparison of Docked VS Dockless Systems**
- ▶ **Challenges to Governance**
- ▶ **Updated Regulations VS Enforcement**
- ▶ **Where next?**

Bike-sharing Evolvemement

First public bike-sharing scheme



1995
Copenhagen

Paris city government launched Vélib



2007 Paris

China launched her first scheme in Hangzhou



2008 Hangzhou

2016 Shanghai,
Beijing

First dockless public bike-share launch in China



2017 and beyond

By 1Q 2017, projected to increase to over 20 million bikes. By 3Q 2017, China government states new regulations against dockless public bike-sharing.

Comparison – Docked VS Dockless

	Docked System	Dockless System
Infrastructure construction	High	Nil
Bicycle development	Medium	Low
Project costs	Relatively High	Relatively Low
Funding	City governments	Private (angel, VC, etc.)
Governance	Managed	Unplanned

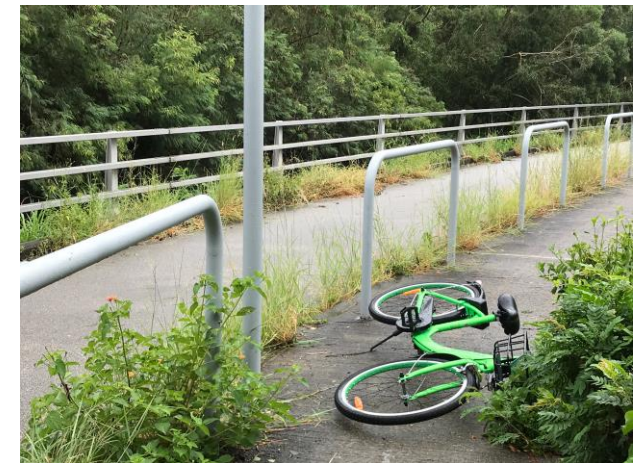


Source: Smoove



Source: hbpcar.com

Challenges to Governance



Source: Hong Kong Economic Journal

Putting bikes in a unready market – HK

- ▶ Outdated bicycle policy
- ▶ Inappropriate bicycle facilities
- ▶ No integrated transport policies
- ▶ No market for bicycle as a mobility means
- ▶ Bike-Sharing in HK – Last-mile connection or Unrealistic market follower?



Source: 香港01

Governance by Enforcement

- ▶ Bike-sharing positioning as a start-up, with consideration to the transport policies
- ▶ Lead to negative impression from public and law enforcement

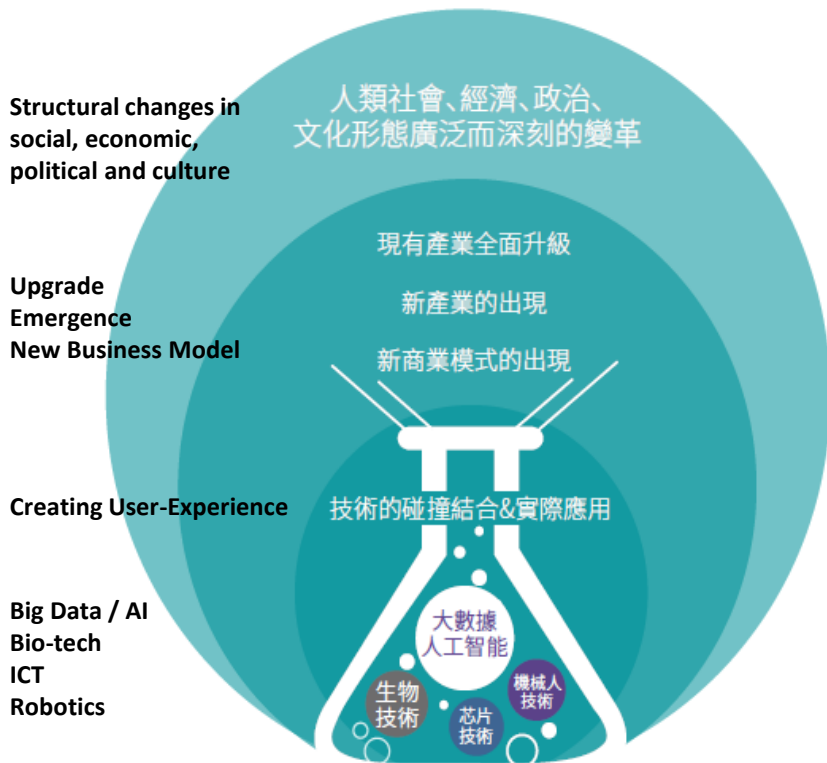


Governance by Regulations

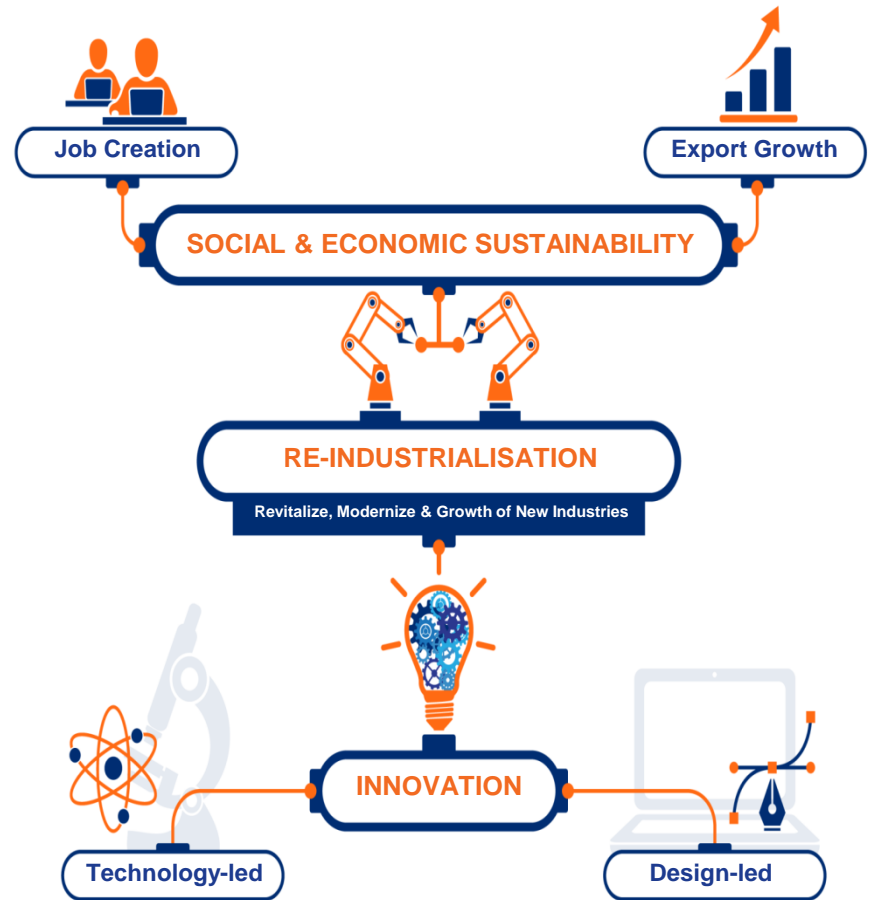
- ▶ 《关于鼓励和规范互联网租赁自行车发展的指导意见》 (Internet-based Bicycle Rental Policy Thought Paper), jointly presented by 10 bureaus, distributed 2 August 2017.
 - Promote Innovation
 - Bicycle placement policy
 - Regulate parking areas
 - Not to promote electric bicycles
 - User-name registration
 - Not to target under-aged
 - Regulate deposit funding
 - Operators' exit strategies and protection to users



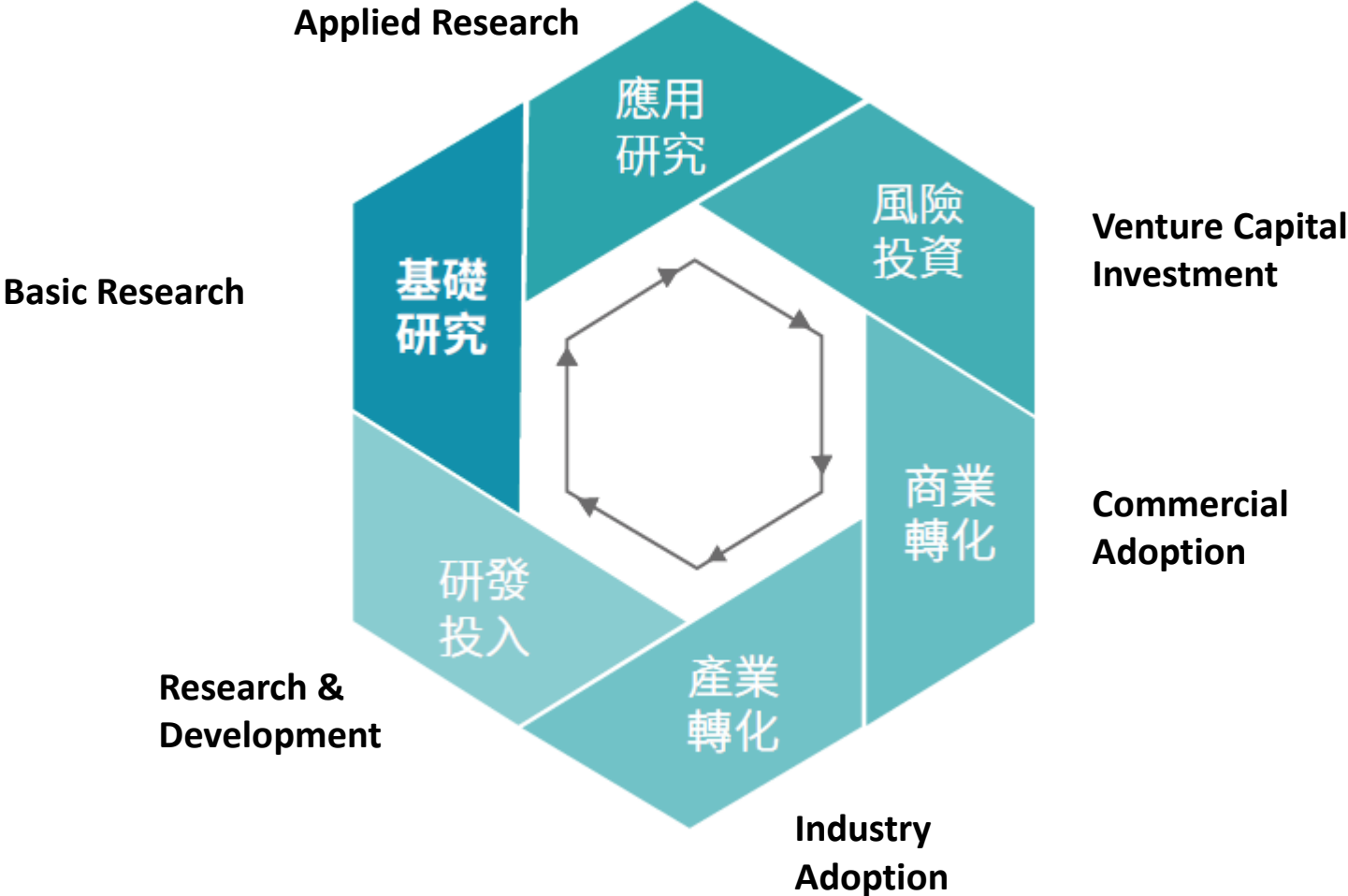
Innovation is the Future



Source: HK X-Tech



2 Types of Innovations



Source: HK X-Tech

The Last-Mile Mobility Innovation Lab

在线出行服务发展历程



Car-rental Online

Car-pool

Taxi Online

Limousine Online

Car Share

Bike-share

Source: iResearch



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A Better World***