

中国共享单车发展现状及政策建议

The Development and Policy Recommendations for Dockless Bike Share (DBS) in China

2014年，北大毕业生戴威与4名合伙人共同创立 ofo，致力于解决大学校园的出行问题。2015年6月，超过2000辆 ofo 共享单车出现在北大校园。2015年共享单车概念开始在中国兴起，资本和巨头开始了布局。2016年随着共享经济理念的兴起，以互联网作为媒介，借助智能手机支付技术的大发展，共享单车快速进入中国各大城市，几乎是一夜之间，红黄蓝各色共享单车如同雨后春笋般，出现在大街小巷各个角落，其在数量、辐射面、影响力、使用者体验等各个方面迅速超越了其他短途交通工具。

In 2014, the ofo was established by a Peking University graduate Dai Wei and 4 partners, which aimed at serving the internal transportation needs within the campus. In June 2015, the Peking University witnessed more than 2000 ofo bikes being shared, and then the dockless bike share (DBS) market has boomed over the entire country and attracted the attention from the investors and giant companies. In 2016, the growing popular sharing economy together with high speed mobile networks and smart phone technology brought the DBS business to nearly every corner of China and created a colorful playground for different operators with different colors as their identities. This kind of new bike-sharing model has become so popular with its huge amount, coverage, popularity and convenience for the short distance commuters.

与传统的有桩公共自行车系统相比，共享单车在技术上和运营上都有革命性的突破。共享单车系统无需设置固定的锁桩及服务终端，基于GPS、互联网+、手机支付等技术，打开手机共享单车APP扫描车身二维码（ofo除外），即可方便地实现车辆解锁及支付功能，大大提高了系统的灵活性与便捷性。调查结果显示90%的用户认为共享单车是公共自行车发展的必要趋势。

Compared with the traditional public bike with fixed parking docks, this dockless bike-sharing model is innovative in technology and operation. It does not require the fixed dock, lock and service terminal, instead, it can be accessed through the

on-board GPS, the Internet +, and the mobile payment to lock/unlock and pay by scanning the QR code on the bikes (except ofo) in the smartphone Apps, which gives the users great convenience and flexibility. A survey result showed that more than 90% of the users believe DBS will be the future trend of the public bike industry.

据猎豹全球智库统计，截止 2017 年 4 月共享单车运营企业数量已达 45 家，共投放自行车约 720 万辆。据中国最大的两家共享单车运营商公布数据显示，摩拜单车在中国超过 50 个城市投入运营，累计投放超过 300 万辆单车，最高日使用量超过 2000 万，系统开通至今累计骑行次数超过 6 亿次；of0 单车在国内外超过 70 个城市投入运营，累计投放超过 300 万辆单车。

According to the statistics of the Cheetah Global Lab, until April 2017, there are 45 DBS operators in China with around 7.2 million bikes. While for the big two, the Mobike is operating in more than 50 cities with around 3 million bikes and 20 million times maximum daily usage. The accumulated usage of the Mobike has amounted to 600 million times since its establishment; while for ofo, it now operates 3 million bikes in more than 70 cities.

共享单车的爆发式的增长快速的释放了中国城市原本被压抑的自行车出行需求，也明显的改善了城市的交通出行结构和大气污染排放。高德《2017Q1 中国主要城市交通分析报告》指出，伴随着共享单车的出现，北京、上海 5 公里内的小汽车短距离出行明显减少，间接反映 2016 年共享单车在北京、上海的推广替代了部分短距离的驾车出行，降低了小汽车短距离出行的比例，一定程度减少了大气污染和能源消耗。

The boost of the DBS business has significantly released the bike travel demand in China and improved the mobility mode share structure in the cities and the air quality as well. The Report of Traffic Analysis in Major Cities in Q1 2017 produced by AMAP, a major online map provider, indicates that the short distance travel (within 5 km) by car in Beijing and Shanghai has been remarkably reduced since the DBS became popular, which also means the bike-sharing has replaced numbers of short distance travel by car in 2016 and then contributed to the air quality improvement and energy conservation efforts.

随着共享单车始终快速的新起，多方资本的介入，行业参与者的增多使得竞争随之加剧，共享单车数量成级数性增长。据不完全统计，截止至 2017 年 4 月上海、深

圳、北京、成都四城共享单车数量分别为 45 万、52 万、70 万和 50 万，这对原有的城市管理产生了强烈的冲击。城市出行习惯的差异化、自行车骑行基础设施的不足、管理规则的混乱和缺失等，使得如何在共享单车进入城市后“保证城市公共空间有序及交通秩序良好”成为各城市管理部门目前重点考虑的问题。

The DBS is now attracting more investors and players in the market. According to the statistics, until April 2017, in the four cities of Shanghai, Shenzhen, Beijing and Chengdu, there are around 450 thousand, 520 thousand, 700 thousand and 500 thousand bikes respectively, which have posed a big challenge for the urban administrators. The tradition of the city mobility modes, the lack of cycling infrastructure, the inactions in management have led to great difficulties and urgent challenges for the urban management authorities on how to ensure the effective utilization of the city public space and the smooth traffic.

由于共享单车也是新生事物，伴随共享单车而生的问题都是新情况，并没有现成的解决方案可借鉴。共享自行车在各个城市的盛行，同时也将城市对自行车交通一直以来的不当定位突显出来。各地政府部门也在各方面对共享单车开展了引导、规范工作，目前已有 9 个城市出台了相应的政策，不过现阶段各地政府对共享单车的管理均处于探索阶段，并未真正解决上述问题。

There are no existing solutions for this new-born bike-sharing model and its new problems. The popularity of the bike-sharing has even highlighted the previous underdevelopment of the cycling infrastructure in the city. The government is now exploring the policy on how to guide and regulate the bike-sharing and operation. Even 9 cities have carried out their regulations, but it is still in the stage of exploration and the solutions still facing the matter of trial and error.

共享单车的新模式带来的新挑战，不仅仅是城市基础设施的完善，同样包括服务运营体系创新等一系列问题。这是共享单车需要面临的重要问题，也是共享单车下半场的核心议题。面对共享单车这一新课题，仅靠市场自我调节无法完全解决，目前急需在制度框架与底线下完善管理政策及服务规范，界定政府、企业和使用者的责任和义务，让政府、企业及使用者各司其职，发挥所长，在合作中创新，在发展中完善。对此，ITDP 提出以下的共享单车政策建议：

The new challenges are not only for the infrastructure, but also for the

innovation in service and operation system, which would be the core for the future development of the DBS business. To solve this difficulty, market alone is not enough, it needs the joint efforts from the government, the bike operators and the users under a regulation framework and play their own roles for cooperation and mutual development. ITDP therefore proposing the following policy recommendations on DBS:

1、明确共享单车在城市交通的定位，提供精准的政策支持

Better positioning of DBS in the city mobility structure and providing targeted policy support

共享单车，本身是个市场项目，参与到了公共基础服务领域。共享单车所提供的出行服务具备一定的公益属性，市场作为公共服务的供给者，在提高服务质量与效率方面具有天然优势。但市场与资本也存在不可规避的缺陷，企业在提供服务的时候，为寻求商业利益，往往缺乏承担公共服务成本的动力，无序占道停放便是最显而易见的问题。当各路资本高歌猛进时，共享单车服务供给尚可保证，当共享自行车在潮水退去的时候，共享单车必然会遭遇城市规范管理导致的成本上升的压力和追逐商业利益的局限，届时面临者寻求准公共服务、公共服务政策支持或者进行转型。在城市共享单车发展之初，应从优化城市交通体系格局、促进市民便捷、绿色出行角度出发，明确共享单车在城市交通的功能与定位，提供精准的政策支持，是鼓励和引导共享单车发展的必要保证。

DBS itself is a market player but participates in the public service area. The mobility model of DBS can be considered as a part of the public welfare facilities. The marketized public service provider in nature has a better competitive advantage in service quality and efficiency. However, the business seeks for profit anytime in providing its services, which in turn become not enthusiastic enough in bearing the cost of public service, one example could be the illegal and random parking. When the investors and capital are enough, the service of the bike-sharing can be guaranteed, however, once the investors are not so interested someday, the bike-sharing model has to shift from seeking profit to providing public services with stricter regulations and higher operating cost. Therefore, in the very beginning of the bike-sharing development, targeted policy support is necessarily needed in optimizing the traffic structure apart from promoting the green and more convenient

travel for the citizens. A better positioning of DBS in the city mobility structure and the targeted policy support could be the key and basis for the sustainable development of the DBS initiatives.

2、 出台相关的指导性意见或条例， 界定政府、 企业及使用者的责任和义务， 为共享单车的运营及管理创建基础。

Developing the guidelines and regulations, defining the rights and responsibilities of the government, operators and users to lay a solid foundation for the bike operation and management

伴随着共享单车的野蛮生长， 车辆损毁、 违规占道、 私人侵占、 单车押金去向不透明、 单车企业运营管理不善等的负面问题也激增起来。 伴随者资本疯狂追逐下的无序竞争， 没有确定法规约束成了共享单车的发展的首要问题。 同时， 使用共享单车中的不文明现象不断见诸报端， 一场有关“国民素质高低”的争论也随之而来。 实际上， 所谓的“低素质者”， 只是在无规则规范、 无法律约束状态下催生的“无监管人群”。 简单以市民素质低来解释共享单车乱象频发， 也有以偏概全之嫌。 面对共享单车这一新课题， 仅靠市场自我调节无法完全解决， 目前急需在制度框架与底线营造自由、 宽容的行业生态。 让政府、 企业及使用者各司其职， 发挥所长， 在合作中创新。

With the wild growth of the DBS business, this model has also led to problems such as illegal parking, vandalism, theft, intransparency of the deposit and the faulty operation and management of the bike companies. The disorderly competition without regulation has become the primary challenge in the DBS market. More and more irresponsible behaviors by the users are also bringing the debate on the civilized awareness of the Chinese people. Actually, the so called “low quality” people are just those “no-regulated people” without proper laws and regulations. The misbehaviors of the certain group cannot represent the all. For the new things like the DBS, market alone is not enough to solve all the problems. A free and flexible business environment with proper regulations shall be created timely to allow the government, the operators and users play their own roles and grow together.

应出台相关的指导性意见或条例， 明确界定政府、 企业及市民等三方的责任和义务， 由经营企业自主投放车辆并提供租赁服务， 政府规范引导并提供配套基础设施支持和相应的政策保障， 市民合法依规使用， 保障各方合法权益。

Therefore, the guidelines and regulations shall be carried out to clearly define the responsibilities of the government, operators and users. The operators shall put the bikes into the market by themselves, the government shall provide the guidance, infrastructure support and relevant policy safeguard, while the users shall rent the bikes under the regulations so that the rights and interests of each party could be guaranteed.

3、坚持以人为本，市民提供便捷、绿色、安全的自行车出行环境

Sticking to the principle of “people-oriented” and providing an accessible, green and safe cycling environment

一是符合实际的自行车出行需求，完善设置自行车专用设施，包括自行车道和自行车停车设施

a) Improving the appropriate cycling facilities including the bicycle lanes and parking facilities

共享自行车在各个城市的盛行，将城市对自行车交通一直以来的不当定位突显出来，同时也体现出城市自行车专用设施的匮乏。让自行车出行成为一种安全、方便和可行的城市出行方式，提供自行车专用设施是基础。首先是需要符合实际的自行车出行需求，合理的提供自行车存放点，这不仅可以为骑行者提供便利，也能减少因随意停放自行车造成的混乱，自行车停车点应贴近需求，沿公交站点周边，需求集中的商业区、商务区及居住区布设。其次需要完善自行车道建设，安全、舒适、方便易用的自行车也是自行车骑行的必要保证。

The boosting of DBS all over the country has highlighted the past underpriority of cycling and the lack of bicycle facilities within the cities. To create a safe, convenient and accessible environment, improving the bicycle facilities could be a necessity. The first priority is providing proper parking space for the bikes, not only for the convenience of the users but also for easier urban management. The parking space shall be close to the needs like the bus stops, the business areas, the commercial areas and the residential areas. The second point is strengthening the construction of the bike designated lanes to provide a safe, comfortable and accessible environment for cycling.

二是保障自行车车辆安全和控制品质，制定共享自行车的产品标准

b) Improving the safety and quality of the bikes and developing the technical standards of the shared bikes

共享自行车的使用强度、频度远高于个人自有自行车。采用已有中国国家自行车标准远远不能满足使用的需要，同时，共享单车的使用特征有别于普通自行车的特征，也需要进行专项的技术规定。为保障承租人骑行安全，有必要单独制定共享自行车的产品标准，建议共享单车车辆标准，对自行车硬件方面做了详细的规定；

The DBS have much heavier and more frequent usage than the personal bikes. The existing national standard for bikes is far from enough. Also, the use of the shared bike is different from the ordinary bikes which requires a specialized technical specification. The hardware of the bikes shall be specially designed to ensure the safety of the users.

三是保障社会公平，增加多种支付方式

c) Adopting different payment methods to ensure social inclusiveness

以摩拜单车和 ofo 为代表的典型共享单车使用者绝大多数是年轻用户，造成这一现象的主要原因是共享单车能够被使用的一个基本条件是可以熟练使用智能手机和 APP 来租还车和付费。这给中老年人群使用共享单车造成障碍。而传统的永安行公共自行车，由于有多种支付手段，可以有效为中老年人群服务，因而使用者年龄更加均衡。这说明从提供交通工具的社会公平性方面来看，需要为居民创造多种方式的支付手段，为多数市民便捷使用共享单车奠定基础。

Most of the Mobike and ofo users are young people who are capable in using the smartphones and Apps in unlocking and paying the DBS. However, the elderly generation might have some difficulty in using the DBS. The traditional Youon Public Bike have several payment choices which can be easily used by the elderly and have a better coverage of the users. Adopting different payment methods could lay a solid foundation for using the bikes by most of the people and contributes to social inclusive development and equity.

4、明确政府各部门职责分工，落实管理责任，填补管理空白，完善公共服务

d) Defining the responsibilities of each government authorities to improve the management and public services

由于共享单车运行和停放都需要利用城市的道路和场地，随着共享单车的普及，这对政府的公共管理提出了新要求。由于共享单车管理涉及多部门，在进行管理时，应尽快政府各部门职责分工，落实管理责任，防止各自为政的乱象，同时，也应清晰的定位政府监管角色，填补管理空白，完善公共服务、尊重市场资源配置，保证市场有序运行。建立如押金管理制度，保险制度，健全投诉及执法，维护良好有序的公共空间环境。

The operation of the bike-sharing requires the use of urban roads and parking space. The wide spreading of the bike-sharing has already posed new challenges for the government. Since the management involves several different departments, the responsibilities of each government authorities shall be better defined to improve the management efficiency and avoid lack of coordination, as well as ensure the orderly operation of the market. Similar actions like the deposit management, insurance system, complaint redressing mechanism and law enforcement shall also be established and improved to build a regulated public space environment.

5、鼓励技术及管理创新，以新的方法应对新的挑战

e) Encouraging technical and managerial innovation in tackling the new challenges

共享单车运营企业应依托现代信息技术在车辆设施设备和运营管理上技术创新，提升共享单车服务和管理水平。建议共享单车必须配置 GPS，为信息化管理奠定基础，鼓励使用“电子围栏”技术，配合城市管理，能够简单、迅速和有效的解决共享单车乱停乱放问题；城市建设统一的监管平台并实现信息共享，开展大数据分析，为科学确定总量规模、合理设置自行车停放区等；鼓励共享单车运营企业自设共享单车停车位，在停车需求集中的区域共享单车运营企业可设置立体停车楼来存取共享单车。

The competition among the operators should be on the technological and service fronts, not in the number of bicycles. It is recommended that GPS shall be installed on each bike for the basis of informationization. The “geo fencing” technology could also be adopted in the urban management, which could easily solve the illegal parking problem in a fast and efficient manner. A comprehensive monitoring platform shall also be established to share the information and big data so as to better plan the scope of the bikes and layout of the parking places. Operators are also encouraged to build their own designated parking spaces for the bikes, while in the dense areas, the multi-storey parking buildings can also be considered for a more efficient circulation of the bikes.

6、建议制定城市共享单车服务规范，保障各方合法权益

- f) Establishing the service standard for DBS to ensure the rights and interest of each party

建议制定城市共享单车服务规范，为规范津共享单车租用行为，切实维护租用双方的合法权益，促进共享单车达到标准化、规范化运营要求，提高服务质量，服务规范的制定需要考虑以下因素：明确界定共享单车定义，建立共享单车服务的准入及推出机制，提出共享单车运营具体的服务保障要求，加强运营调度和车辆维护管理，并制定保障各方合法权益的管理规范等；

It is recommended to establish the service standard for DBS to regulate the renting activities and ensure the rights of the operators and users. The service, operation and quality of the DBS can be standardized through a well-defined service standard and regulation. The following aspects shall be considered: clearly regulating the DBS operation, establishing a market access and quitting mechanism for the operators, defining a detailed service standard and requirements, enhancing the dispatching and maintenance of the bikes, and improving the regulations to guarantee the rights and interests of each party.