

Version 2025

Better Mobility

Trendreport



Creating accessible, affordable, safe and sustainable mobility of the future.



POINT &



Better mobility is inclusive mobility.

Inclusive mobility ensures that **sustainable mobility is accessible, affordable, and safe for all individuals, regardless of their age, gender, ability, income, or location.** With growing urbanization, climate change impacts and economic instabilities a one-size-fits-all approach is no longer viable. Inclusive mobility **creates new opportunities as it enhances quality of life and boosts economic participation, innovative solutions and social equity** by reducing barriers to movement.

What to expect.

This report offers a deep dive into the evolving landscape of mobility across Europe, with insights drawn from over **300 startups and more than 100 expert interviews and survey participants.** It **explores innovative solutions and emerging trends** aimed at making mobility more inclusive and sustainable. Expect an analysis of **cutting-edge mobility technologies, policy recommendations, and actionable best practices** from leading European mobility pioneers.

Why it matters.

Mobility systems are mostly **designed for a niche** – typically men, aged 25–45, speaking the local language, without care duties and having 9–5 jobs – and cater for the needs of **physically and psychologically fit people with simple A to B trips.** But mobility requirements differ and the daily mobility of the majority is much more complex.

Out of **450 million** people in the EU:

100+

million

people in Europe have care duties like taking care of children, but a minority of mobility services consider their needs.¹

100+

million

people in Europe have a disability, not including many hidden disabilities, but most mobility services are not barrier free.²

90+

million

people in Europe are over 65 years old and the share of people over 80 more than doubled within the past ten years.³

The potential.

Planning for a variety of needs has **social, economic and ecological benefits.** If people can shift to more sustainable transport modes in line with the European Green Deal 2050, this can lead to⁴



70% decrease in traffic injuries and fatalities across EU (European Union) cities and in monetary terms average cost savings of about 11,000 Euros per person between today and 2050.



Between €200 and €1,170 average cumulative health benefits per capita from active transport modes by 2050, depending on the amount of trips shifted to active modes.



€4,000 cost saving per capita through reduction in green house gas emissions, air and noise pollution thanks to more sustainable urban mobility between 2022 and 2050.



Minus 95–96% CO₂ emissions reduction between 2022 and 2025, driven by a combination of mobility supply and demand management measures.

Better Mobility Trendmap

Shaping the future of mobility for all:
Your visual guide to innovation, inclusion and sustainability.



Top 5

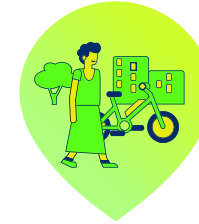
Better Mobility Trends

These five key trends, based on insights from **300+ startups and 100+ experts**, highlight the evolving trends for **accessible, affordable, safe, and sustainable mobility** in Europe.



Build a **Holistic Mobility System** that serves everybody

A comprehensive system must prioritize integration and accessibility, emphasizing **seamless and digital cross-border cooperation**, where hubs combine diverse mobility services. Public transport planning should **focus on passengers**, ensuring barrier-free access throughout the entire journey.



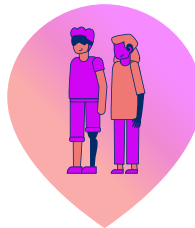
Design **Livable Cities and Regions**

Transforming cities requires rethinking current structures to **prioritize walkability, green spaces, and reduced traffic** while enhancing accessibility through proximity and functional diversity. **Bold infrastructure changes and long-term planning** focused on safety, sustainability, and quality of life are essential.



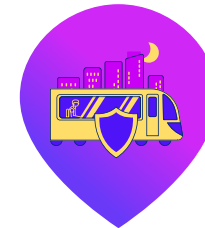
Prioritise **Health** in a changing climate

Prioritizing health is vital as climate change heightens risks, especially for **vulnerable groups and an aging society**. Green spaces, traffic calming, and safe, accessible infrastructure for active mobility **reduce stress, enhance independence, and promote well-being**.



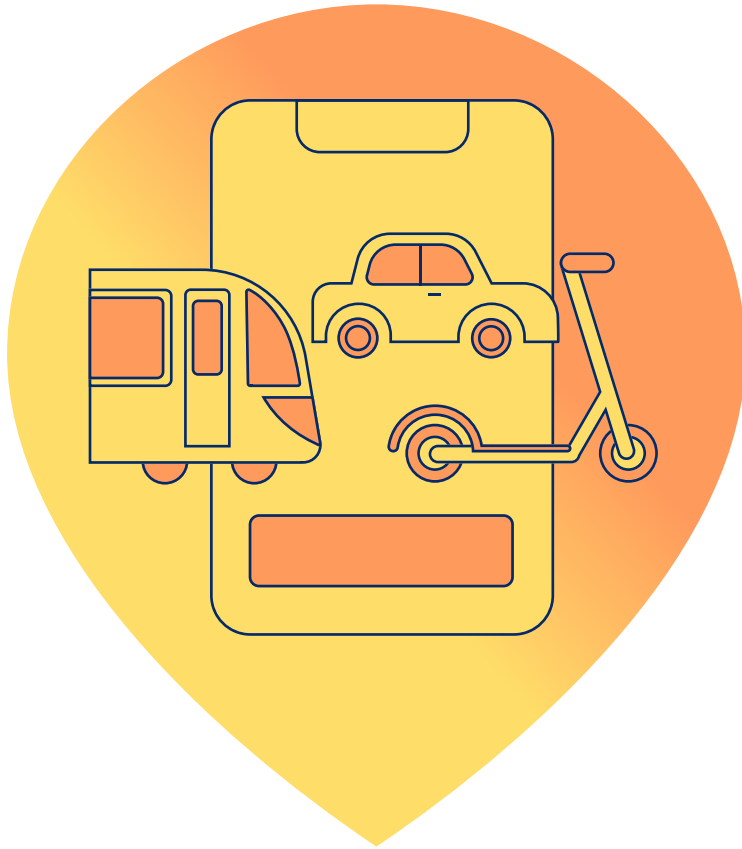
Commit to **Inclusive Design** in mobility solutions

Mobility products should be **functional, stylish, and inclusive, with intuitive designs** that address specific needs while benefiting broader groups. Flexible, **user-tested solutions and a focus on accessibility** normalize inclusion, enhance innovation, and improve experiences for all.



Enhance **Safety and Security** in the sector

Safety and security are essential to inclusive mobility. Therefore **stronger regulations and standards, reliable transport, inclusive mobility services and safer infrastructure** are key. This must be further adapted to handle extreme weather events, ensuring **resilience and safety for all users**.



“To protect our climate, we need a mobility transition. It’s a great time for public transport. Now we must also provide sufficient capacities for that.”

Karin Zipperer, Transport Association East
Region VOR, Austria

Build a **Holistic Mobility System** that serves everybody

Public transport planning must prioritize passengers, ensuring easy, barrier-free access throughout the whole journey. A **comprehensive system that meets diverse needs** is therefore essential, focusing on accessibility, integration, and digital solutions. **Cooperation across borders, connection of transport options on a digital level as well as multimodal hubs and the inclusion of diverse mobility services** such as shared options are key.

Why it matters.

- 📍 **Increase in public transport ridership** by 7% by 2030 in the EU, whereas private car trips should drop by up to 16% to meet the Green Deal objectives.⁵
- 📍 **High priority by the EU through investment** of 7 billion Euros for 134 selected projects in sustainable, safe and smart transport infrastructure.⁶
- 📍 **The megatrend connectivity** accelerates the transition towards an integrated and seamless mobility system where different services can be accessed at the same place.

3 ways to master this trend

1

Create a unified system offering a single point of access departure times, a streamlined ticketing method, and seamless transitions between train and shared mobility services.

2

Invest in mobility workers through education, fair wages, and improved working conditions – their skills and dedication are key to the success of the mobility transition.

3

Involve users in the development process as early as possible to ensure the results truly meet their needs.



Best practice

The Austrian “KlimaTicket” is a great example of easy and affordable ticketing, covering all public transport across the country and even some sharing services. Now it needs further integration of more options like demand-responsive shuttles for more people to use.⁷



Solution example

Nemi is a stand-alone software tool that enables on-demand bus services and improves the efficiency of public transport services in low-demand contexts. Nemi is revolutionizing public transport with their innovative solutions, having successfully implemented over 60 services across multiple countries, including Spain, Italy, Portugal and the United Kingdom.⁸



“Think of both kids and elderly people when planning, and you’ll get more inclusive cities.”

Silvia Casorrán, Metropolitan Administration
Barcelona, Spain

Design Livable Cities and Regions

Public space is crucial for social connection, enabling interactions and fostering a sense of belonging. To truly transform cities, we must rethink current structures, guidelines, and standards. This includes redistributing space, prioritizing walkability, creating more green areas, and reducing traffic (speeds). **Focusing on proximity, functional diversity, and short distances** enhances accessibility for all. Bold approaches to infrastructure, combined with long-term planning focused on safety, sustainability, and better quality of life, are essential.

Why it matters.

- 📍 **Increasing urbanisation** means that over 80% of people in the EU will live in cities by 2050.⁹
- 📍 **Importance of our immediate surroundings:** Covid highlighted the positive side effects of quieter cities and demonstrated how public spaces can be reclaimed for the benefit of the community.
- 📍 **Cities are an important field of action in the mission of sustainability:** urban areas in the EU account for 80% of the region’s energy use and generate 85% of the GDP.¹⁰

3 ways to master this trend

1

Make bold decisions by questioning the status quo and structures, pushing for transformative changes in urban planning.

2

Develop clear performance indicators for designing inclusive, accessible public spaces that prioritize safety, walkability, and green areas.

3

Engage with citizens in their neighborhoods to ensure public spaces meet local needs.



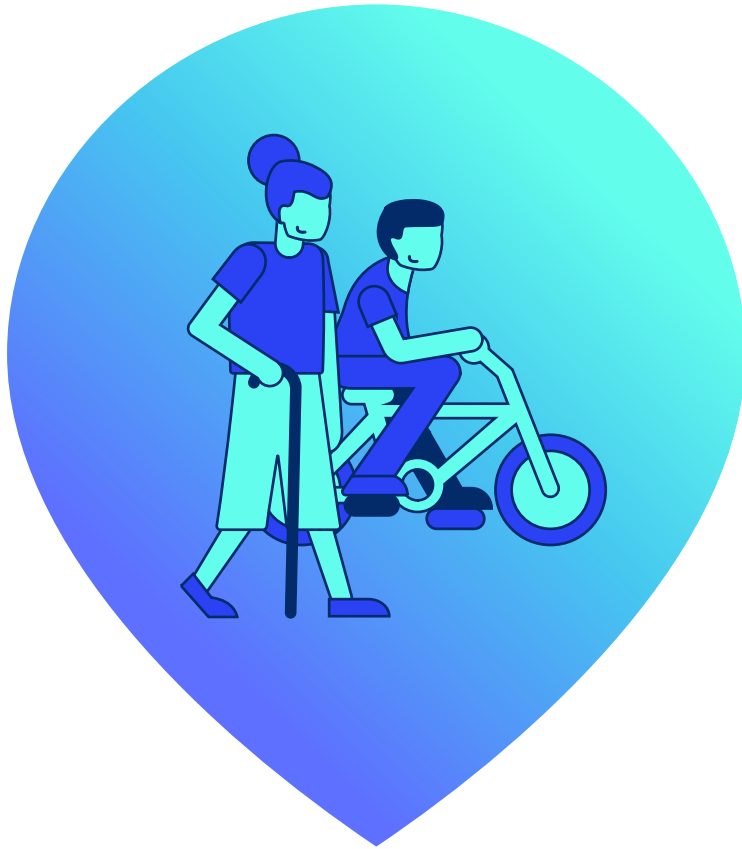
Best practice

In France, Paris, the city is committed to creating 100 hectares of new green spaces, including the revamped Place de la Nation, where residents participated in redesigning the area. Once dominated by traffic with twelve roadways, a rail line, and four Métro lines, it now reflects community-driven urbanism. The city has invested 150 million Euros between 2015 and 2020 and the current “Plan vélo” allocates €250 million from 2021 to 2026 to expand its bike network.”



Solution example

Leezen Heroes provides passenger and freight transport, including city tours, hospital patient transport, on-demand public transport, as well as last mile transport and deliveries on rickshaw bikes. Leezen Heroes already widely established their services in the city of Münster, Germany.¹²






“It is not only about how we move around but how we are developing new technologies and who we are innovating for.”

Tamira Snell, Copenhagen Institute for Future Studies, Denmark

Prioritise **Health** in a changing climate

Prioritising physical and mental health is crucial as climate change increases risks, particularly for vulnerable groups and an aging society. More green spaces and water areas help adapt by offering heat protection, while traffic calming reduces pollution and noise. **Safe, accessible infrastructure for active mobility like walking and cycling enhances independence, reduces stress, and boosts well-being.**

Why it matters.

-  **Demographic trends are clear:** By 2030, one in four people in the EU will be over 64 years old, with many eager to stay active.
-  **Shifting to active transport modes** like walking and cycling could generate €1,170 in health savings per capita between 2022 and 2050.¹³
-  **Climate change:** Extreme weather events and heat will cause the most deaths, especially among vulnerable groups.¹⁴

3 ways to master this trend

1

Link mobility to health for example by promoting active commuting to achieve double benefits for well-being and sustainability.

2

Empower people to move independently by creating accessible and safe infrastructure and solutions.

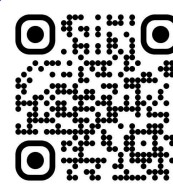
3

Incorporate demographic trends, such as aging populations, into all urban planning for future-proof cities and solutions.



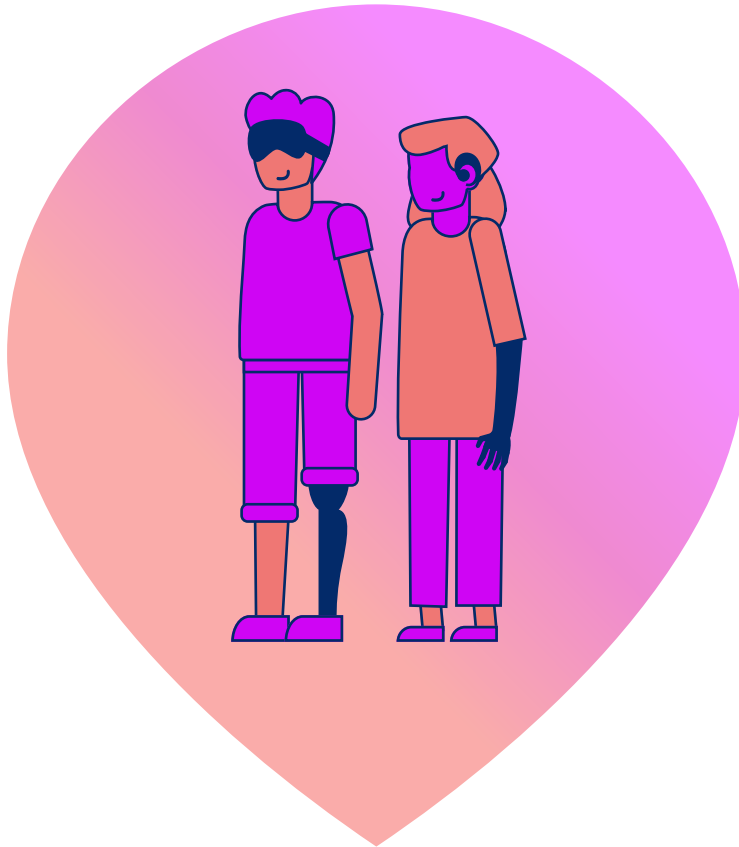
Best practice

In **Germany, Griesheim**, the concept of a "sittable and playable city" improved unwelcoming paths for children and highlighted challenges faced by pedestrians with limited mobility. Diverse objects were found to double as resting spots throughout paths of the residents.¹⁵



Solution example

MOXI automates patient transportation logistics to enhance efficiency and reduce waiting times in healthcare systems. With the solution offering real-time fleet optimization, MOXI is able to help to reduce CO₂ emissions and cut operational costs by up to 30%. Over 25,000 rides were completed and partnerships with 15 healthcare facilities. After piloting successfully in the cities of Hanover and Cottbus, Germany, MOXI is ready to scale across Europe.¹⁶



“Together with our customers, we need to find out where we still have gaps and how we can close them to enable independent use of public transport.”

Esther Buchmüller, Swiss Federal Railways SBB, Switzerland

Commit to **Inclusive Design** in mobility solutions

User-centered design is key to inclusive mobility. Mobility products should be **functional yet stylish**, avoiding stigmatization. Awareness in decision-making and diversity in teams is crucial as solutions should address specific needs while benefiting broader groups, with intuitive and appealing designs. **Flexible, smart options that involve more senses** cater to dynamic lifestyles, and hands-on development lets users test and adapt new solutions. **Prioritizing accessibility normalizes inclusion, breaking barriers and improving experiences for all.**

Why it matters.



The EU Accessibility Act requires accessible webshops, ticketing and information for mobility services by June 2025.



Technological development and digitalisation make it possible to develop solutions for sensory impairments.



Inclusive design is a competitive advantage as it combines accessibility, inclusivity and usability.¹⁷

3 ways to master this trend

1

Test and iterate by organizing testings in real-life settings to gather user feedback and refine designs.

2

Plan for accessibility and get ahead of the curve by aligning with the requirements of the Accessibility Act.

3

Leverage inclusive design and broaden appeal to attract and serve diverse target groups effectively.



Best practice

Lisbon has redesigned its typical mosaic pavements to improve accessibility. While the pattern is beautiful, it poses challenges for mobility. Ten years of research led to a new, safer, and more comfortable pavement model that maintains the aesthetic while prioritizing accessibility.¹⁸



Solution example

The **EOOS** design studio developed a 3D-printed electrically powered cargo tricycle in modular design that can be adapted to the user's needs. The chassis is produced locally by rotational molding out of recycled plastic and the necessary components are added locally in existing workshops. Due to the production technique the bike can be produced locally on a global scale.¹⁹



“In any decision-making: include affected people. You need the experts sitting at the table.”

Roi Shternin, Chronically, Austria

Enhance **Safety and Security** in the sector

Safety and security are essential to inclusive mobility, as different groups have varied needs and perceptions of safety. Vision Zero is the goal for reducing road deaths to zero, but more effective regulations and standards are necessary to create safer infrastructure. Additionally, **addressing physical and mental barriers is vital**. Vulnerable groups often feel unsafe, particularly at night. Additionally: With the increasing threat of climate change, mobility infrastructure must be adapted to handle extreme weather events, **ensuring resilience and safety for all users**.

Why it matters.

- Stability in Uncertainty:** In unstable times, reliable and high-quality mobility services and resilient infrastructure build trust and meet the need for security.
- The climate crisis threatens safety**, but climate protection can enhance independence and security in Europe.
- Safety as a Driver:** The global focus on safety and security pushes accessibility forward, making it a megatrend for inclusive mobility.

3 ways to master this trend

1

Prioritize clear communication and reliability to build trust, encouraging the use of public transport and sustainable mobility services.

2

Focus on strategies to enhance the resilience and safety of infrastructure and services in response to climate change and extreme weather events.

3

Foster awareness and promote positive behavior through prevention, encouraging safer interactions among users and minimizing risks.



Best practice

Vision Zero was achieved in **Helsinki and Oslo** in 2019 through measures like reducing traffic, limiting driving access to city centers, and implementing speed limits of 30 km/h in residential areas and near schools. Streets are now more balanced, with wider pedestrian and cycle lanes, and narrower car lanes.²⁰



Solution example

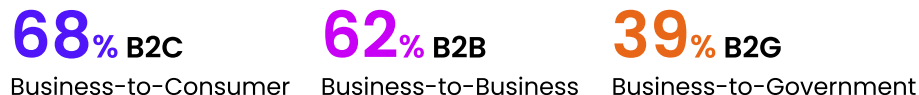
Lane Patrol offers data-driven insights to identify potential hazards and improvement of the cycling infrastructure. Lane Patrol has successfully expanded to over 20 cities across three continents in under 1.5 years since its inception.²¹

Solutions Pool

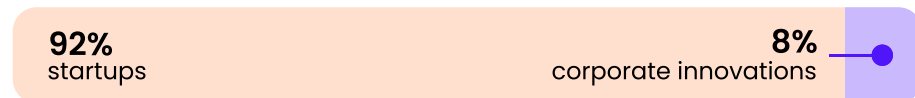
Drawing insights from **over 300 European startups**, with a special focus on France, the Better Mobility Report combines data from a comprehensive **survey and interviews with more than 100 experts from academy to industry** to reveal the latest trends in inclusive mobility. The findings reveal exciting **innovation opportunities, key challenges, and untapped potential** for making transportation more accessible.

General Overview of Solutions Database

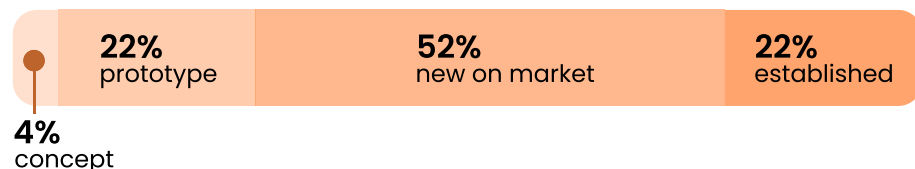
Business model





Background



Stage






From Framework to Action

-  **Almost half (48%)** of all innovations are on **integrated publicly available transport** – which confirms the importance of a holistic approach.
-  **Regulations and policies ranked lowest** in the survey, suggesting they are seen as less critical for driving innovation in mobility solutions.

Technology & Inclusivity

- 57%** **Over half** of all solutions **focus on technological solutions for passengers** – also when it comes to people with disabilities.
- 28%** Of all solutions **target a specific group of people**, there is a potential to tailor services to specific needs.

Potential for Innovations

-  **Only 5%** of the innovations focus on **tourism** and **only 10% on health** despite being a major trend.
-  The topic of **health is underrepresented** in active mobility solutions even though it offers tremendous benefits and there are a lot of solutions for families.
-  **Only 3%** of the innovative solutions **target foreigners and tourists**, which depict a high potential.

Key Potential Areas

Embrace Holistic Solutions

Integration of both technical and non-technical solutions that work across sectors is needed. **Combining transportation, infrastructure, social needs, and environmental concerns** leads to innovative, adaptable solutions that benefit all.

Leverage Growth Potential in Tourism and Health

The **tourism and health sectors have vast untapped potential** for inclusive solutions. Both industries currently lack sufficient accessibility features, but there is **growing demand for innovative solutions and high potential for growth**.

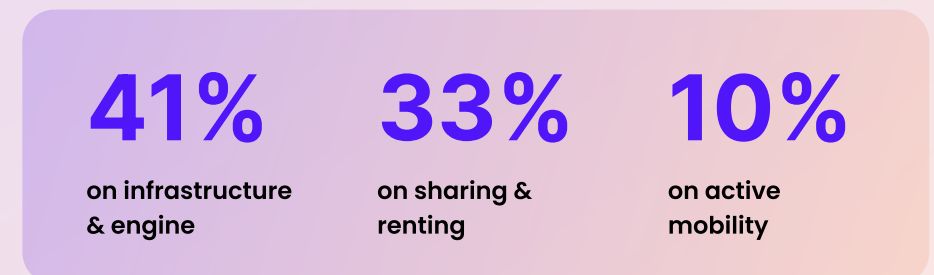
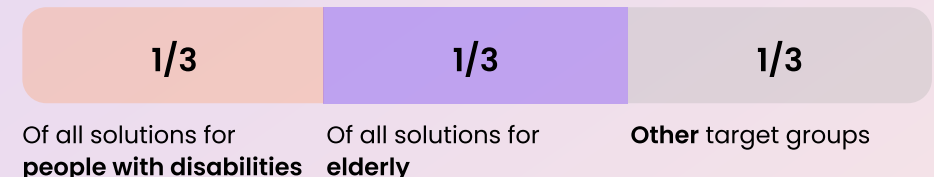
Tailor Solutions for Target Groups

Tailored solutions, designed specifically for different target groups, can greatly enhance mobility. These **solutions don't always need to be completely new, small alterations to existing infrastructure or services can make a significant difference** in catering to the diverse needs of various groups.



Innovation in France

France is a strong hub for inclusive mobility solutions. An analysis of 100 innovative solutions from the French impact innovation organization PULSE reveals a strong emphasis on barrier-free access and enhancing mobility for people with disabilities. PULSE leverages entrepreneurship as a tool for inclusive and sustainable development through initiatives such as awareness campaigns, capacity-building for local stakeholders, and support and funding programs for high-impact projects, both in France and internationally.²²



Vienna, Austria

Vienna has been awarded the **Access City Award** 2025 for its ongoing efforts to improve accessibility in key areas such as **transport, infrastructure, public spaces, services, and communication**.²³ While challenges remain, the city has made progress in integrating accessibility into daily life and fostering inclusivity. Vienna's commitment to the 15-minute city concept – focusing on **short distances, mixed-use neighborhoods, and reallocating street space for active mobility and public transport** – reflects its intent to create a more accessible and livable urban environment.

“Innovative solutions in the mobility sector require more than just the development of energy-saving SUVs. If we want to achieve the green transformation, we can no longer look at it in isolation, but must develop holistic, human-centered approaches in all areas.”

Agnes Sindelar, Vienna Business Agency, Austria



Gender-sensitive city planning has been a priority in Vienna for over 20 years, integrating diverse needs across age, gender, and backgrounds. This approach enhances everyday life and promotes inclusion in public spaces. A detailed handbook provides guidance on applying these principles in urban planning.²⁴

The **“Grätzeloase”** initiative fosters inclusivity by empowering residents – especially children and youth – to shape their local neighborhoods (Grätzln). Through green parklets in modular designs, it creates accessible, shaded spaces for community connection, enhancing public life and encouraging diverse participation.²⁵

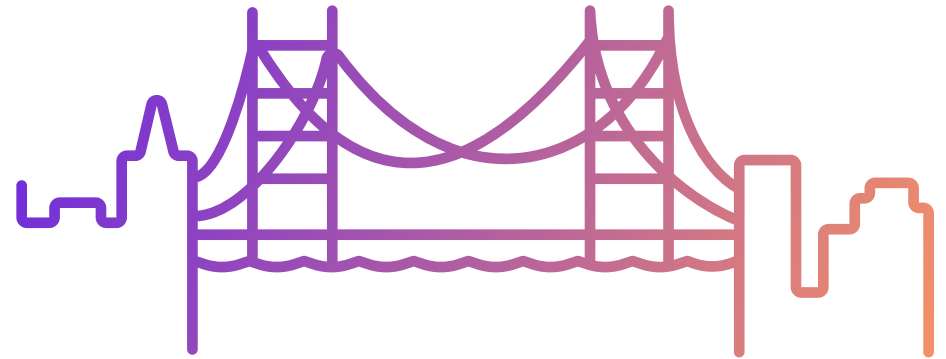
The **“Mädchen für Favoriten”** project empowers girls in the district “Favoriten” by involving them in shaping the space “Reumannplatz”. The initiative boosts self-esteem, prevents violence, and promotes public space ownership. Over 20 schools and partners contributed, culminating in Vienna's first girls' stage, enhancing visibility and participation.²⁶

Lisbon, Portugal

The European Commission has named **Lisbon** the **European Capital of Innovation** for 2023, acknowledging its efforts to foster new solutions and promote economic and social inclusivity.²⁷ The city has worked to create an environment that **supports innovation, underpinned by a culture that values openness, diversity, and collaboration.** The city's dedication to fostering partnerships between the public sector, private enterprises, academia, and citizens has created a vibrant ecosystem that drives meaningful change.

“We defined three high level objectives for the whole municipality. The first is to prevent the creation of new barriers. The second is to adapt what is necessary to adapt. The third is mobilizing the community.”²⁸

Pedro Nave, City of Lisbon, Portugal



Lisbon's Pedestrian Accessibility Plan places strong emphasis on involving people with various disabilities in the planning process. By designing and testing solutions based on their experiences, the city ensures that infrastructure changes meet the needs of those with multiple types of disabilities.¹⁸

Given Lisbon's hilly terrain, the city has introduced a plan to install escalators in the Castle Hill area to improve accessibility. The plan includes four escalators, three of which are already built, enhancing access for elderly, people with disabilities, and families in steep areas.²⁹

"Accessibility in the Train Station of Benfica" is a pilot project that focuses on improving access to the Benfica train station. By exploring various solutions, Lisbon aims to make this vital transportation hub safer, more inclusive, and accessible to all, ensuring that everyone can easily use public transport.³⁰

Better Mobility Toolkit



Awareness & Knowledge

Interactive innovation and strategy workshops at the **Mobility Academy** help teams to build future competences by showing participants the benefits and fields of action of inclusive mobility. The content focuses on creating a more inclusive culture in organisations, promoting diverse teams and developing innovative mobility solutions that meet the needs of all users.



Testing & Validation

Better Mobility Labs involves Popups and interactive experiences where target groups can actively participate in testing mobility solutions. This hands-on approach allows for real-time feedback, enabling users to shape and validate the design. It can also include consulting throughout the entire design process to ensure inclusivity.



Acceleration & Innovation

The **Better Mobility Accelerator** is a pan-European innovation program with headquarters in Lisbon and Vienna. Its goal is to develop innovative mobility solutions and business models tailored to the mobility needs of diverse user groups in collaboration with startups, corporates and cities.



Support & Investment

As Europe's most active investor for gender-balanced startups and scale-ups in urban mobility, **EIT Urban Mobility** provides access to funding and support channels which deliver financial, environmental and social impact on the urban landscapes around us.



Community

Join the **Better Mobility Community** – the largest ecosystem in Europe for inclusive, safe, affordable, and green mobility! Together, we drive change and stay ahead of trends and innovations, shaping the future of mobility across Europe. Be part of the movement and help create a more accessible and sustainable world.

Creating better mobility together!

Now is the time to use inclusivity as your competitive advantage – whether in research, urban development, strategy or product innovation. Together, we can proactively shape the future of mobility. Share your ideas, feedback, and collaboration opportunities with us, and let's drive **#BetterMobility** in Europe and beyond!

POINT&

POINT& is an international expert-team, dedicated to advancing innovative mobility solutions that truly reach and move everyone. The team empowers mobility providers and cities to innovate, creating accessible and comfortable mobility solutions tailored to diverse target groups from youth and families to employees and tourists.

Lina Mosshammer, Claudia Falkinger, Johanna Singer

This project is co-funded by the
Vienna Business Agency



Impact Hub Vienna is a community for impact innovators and a launchpad for initiatives across Europe. With over 1,000 members and 500 supported startups, it has run 40+ incubation, acceleration, and investment programs in areas like mobility, education, health, sustainability and biodiversity.

Patrick Würschl



EIT Urban Mobility is an initiative of the European Institute of Innovation and Technology (EIT), a body of the European Union, committed to accelerating the transition to sustainable mobility. We provide established businesses, startups, universities, research institutes and the public sector with access to markets, talent, funding and knowledge.

Yoann Le Petit

Graphic Design by *Tetiana Filatova*, Looksmart

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Methods

The report is based on an extensive **literature review** of current trends in the fields of mobility, diversity and inclusivity. This research was validated through **stakeholder workshops** with more than 40 participants, over 20 **interviews with mobility and inclusivity experts** from all over Europe and an **online survey** with over 70 mobility experts from Europe participating. The research was carried out from May to December 2024 with a **geographical focus on Europe**.

The analysis of startups and solutions is based on a **database of over 200 innovative solutions**. The best practice example from France draws on insights from **100 mobility startups** supported by PULSE. Additional data was sourced from trusted platforms, including the Better Mobility Accelerator, EIT Urban Mobility and other European mobility-focused databases. Solutions were selected based on their alignment with the criteria of accessibility, safety, affordability, and sustainability in passenger mobility.

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- ²⁶ ÖGUT 2024 <https://partizipation.at/praxisbeispiele/maedchen-gestalten-den-reumannplatz/>.
- ²⁷ Lisboa 2023 <https://lisboainnovation.com/lisboa-is-the-european-capital-of-innovation-2023/#:~:text=Lisboa%20has%20affirmed%20itself%20as,European%20Capital%20of%20Innovation%202023>.
- ²⁸ A Mensagem de Lisboa 2024 <https://amensagem.pt/2024/10/14/mobilidade-peao-lisboa-plano-acessibilidade-pedro-nave-cml/>.
- ²⁹ getLISBON 2025 <https://getlisbon.com/discovering/lifts-and-funiculars-of-lisbon/>.
- ³⁰ João Bernardino 2024 expert interview on 05.12.2024.

