



Jakarta Bicycle Rental Implementation Final Report

Executive Summary

April 2025



 ITDP

 UKPACT



The Institute for Transportation and Development Policy (ITDP) is a global non-profit organization founded in 1985, headquartered in New York, United States, and focused on promoting sustainable transportation innovation and urban development. For nearly two decades, ITDP Indonesia has provided technical assistance to local governments in Indonesia, such as Jakarta, Semarang, Surabaya, Pekanbaru, and Medan in supporting sustainable transportation development through public transport integration and reform, active mobility enhancement, transit-oriented development (TOD), vehicle electrification, GEDSI, and traffic demand management.



Jakarta Bicycle Rental Implementation Final Report

April 2025

Published by:

Institute for Transportation and Development Policy (ITDP)

Written by:

Mega Primatama
Efod Zhet Mangontan

Editor:

Deliani Poetriayu Siregar
Fani Rachmita

Editorial Design:

Retno Ayu Cahyaningrum

Published in:

April 2025

Contact:

Fani Rachmita - Senior Communications & Partnership Manager
fani.rachmita@itdp.org

Mega Primatama - Urban Planning Associate
mega.primatama@itdp.org

ITDP Indonesia
Jl. K.H. Wahid Hasyim No.47 (WH47) Lt. 6
Menteng, Kota Jakarta Pusat, 10350




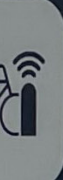
**Titik Tambat
Sepeda Sewa
di Kawasan ini:**

Bike Sharing Stations
within this vicinity

Executive Summary

Table of Content

Introduction	7
Evaluation of Jakarta's First Rental Bike Pilot Phase	8
A. Identification of service delivery needs, including potential funding and revenues	8
B. Availability of supporting policies	8
C. Bike type preference	8
D. Purpose of using a rental bike	8
E. Ease and availability of information on bike rental	9
F. Service operational issue	9
Bikeshare Implementation Recommendations	9
1. Jakarta Bike-Sharing Regulation	9
2. Jakarta Bike-Sharing Regulation Points	9
3. Jakarta Bike-Sharing Business Scheme	10
3.1. Bike Rental Service Operator	10
3.2. Pricing of Bike-Sharing Service	10
4. Jakarta Bike-Sharing Operational Scheme Planning	11
4.1. Service Area Planning	11
4.2. Minimum and Operational Service Standards	11
4.3. Monitoring and Evaluation	12
Second Rental Bike Pilot	12
A. Socialization of Pergub	12
B. Drafting of External Registration and Internal Administration Flow	13
C. Pilot Area Analysis	14
Challenges in Organizing Bike Rental	14
A. Policy Directions and Priorities of Jakarta	14
B. Availability and Willingness of Prospective Operators	14
C. Field Conditions	15
D. Adjustment to the Minister of Transportation Regulation	16
Conclusion and Follow-Up	16
A. Acceleration of Second Pilot Implementation	16
B. Adjustments to Bike-Sharing Regulations	16



ambat
Sewa
san ini:
g Stations
s vicinity:

**Cara Menggunakan
Sepeda Sewa:
How to Use
Bike Share:**

1. **Isi aplikasi sepeda sewa**

2. **Daftar account**

3. **Siapkan**



4. **Carikan sepeda**

5. **Scan QR**

6. **Kembalikan sepeda**

7. **Rapihkan sepeda**

8. **Bayar QR**



Jak Lingko

Jakarta

023

Jakarta



Executive Summary

INTRODUCTION

Bike-sharing services aim to increase the use of bicycles as a daily transportation option in the city and fill the gap of environment-friendly transportation modes in the first and last-mile trips of public transportation users. Bike-sharing services in the city also encourage the creation of a safe and inclusive bicycle network. The concept of bike-sharing allows the public or users to rent a bicycle for a certain period. Bicycles can be picked up and returned at docking stations across the city.

In Jakarta, bike-sharing has had a long journey. In 2013, discussions on this service began with a study by ITDP Indonesia on the potential bike-sharing implementation to provide alternative mobility in the Senayan, Kuningan, and Sudirman areas. In mid-2018, a Phase 1 pilot of an application-based rental bicycle service in collaboration between the Jakarta Provincial Government and a private rental bicycle operator, Gowes, was launched on a limited scale in the National Monument (Monas) area. With seven docking stations and 100 units of bicycles, the average usage of each bicycle reached 7–13 trips per day, surpassing the worldwide average of approximately 4 to 8 trips/day¹. ITDP Indonesia recorded the highest number of daily trips on August 4, 2018, at 1,551 trips/day.

The success of the Phase 1 pilot was followed by a wider-scale, city-level implementation in Jakarta in 2020. The city-level implementation was carried out in stages, characterized by an increase in the number of docking stations and bicycles. The COVID-19 pandemic has led to a bike boom phenomenon that has encouraged the use of bike rental services. However, various problems arose during the implementation of the pilot, both from the internal side of the Gowes operator (operational and financial constraints) and external factors that resulted in a decline in service quality. Ultimately, Gowes ceased its operations in 2022, marking the end of the first phase of open-space bikeshare in Jakarta.

¹ ITDP Indonesia. 2018. *Laju Bikeshare di Jakarta*. Source: <https://itdp-indonesia.org/2018/09/masa-depan-bikeshare-di-jakarta/>

EVALUATION OF JAKARTA'S FIRST RENTAL BIKE PILOT PHASE

Some of the evaluation findings from the survey results (2020–2022) and the ITDP Indonesia study include the following.

A. Identification of service delivery needs, including potential funding and revenues

ITDP Indonesia identified the cost components required for operators to deliver the service. These components include procurement, operational, and additional costs to mitigate the risk of losing bicycles during operations. ITDP Indonesia study explored potential funding and revenue options to make the service and operations more sustainable, such as alternative funding from investment funds and CSR/ sponsorship. Meanwhile, the revenue alternatives could come from advertising, Building Floor Coefficient (KLB) compensation, and partnership schemes.

B. Availability of supporting policies

The absence of clear regulations related to the implementation of rental bicycles from the Central Government has made the implementation of bicycle pilot services rely only on the Decree of the Head of the Jakarta Transportation Agency (Dishub Jakarta). This decree has not been accompanied by supporting regulatory aspects, including Minimum Service Standards (MSS), and is valid for one month, with the possibility of being extended.

C. Bike type preference

Data from 2021 to 2022 shows that more than 25% of respondents wanted electric bicycles in line with the use of electric bicycles more than manual bicycles because it is faster, easier, and less tiring. This shows the importance of providing both types of bikes: manual and electric.

D. Purpose of using a rental bike

The majority of respondents used rental bicycles for exercise because the service was limited to the Sudirman–Thamrin corridor. Almost 50% of the respondents wanted services that connect recreation places, shopping places, offices, schools, and places of worship, indicating the need for area-based docking stations.

E. Ease and availability of information on bike rental

A survey conducted in August 2022 showed that most rental bike users were new to the service. The few who had not tried it were generally unaware of the rental bike service, how to use it, or the docking stations available.

F. Service operational issues

During the operational period, the rental bicycle service encountered many obstacles, such as a fleet of unusable bicycles due to poor application performance, bike lanes that were still considered too short, docking stations that were too limited, and the service being limited to the Sudirman—Thamrin corridor.

BIKE RENTAL IMPLEMENTATION RECOMMENDATIONS

1 Jakarta Bike-Sharing Regulation

The implementation of the rental bicycle service at that time was still based on the Decree of the Head of the Jakarta Transportation Agency, in the form of operational recommendations and rules that must be adhered to. This resulted in the implementation of the service still not being optimal. In addition, the rental bicycle service was recommended by ITDP Indonesia to be developed into a first and last-mile public transportation service. Since there are no regulations governing the rental bicycle service, based on the evaluation results of the previous rental bicycle pilot, the preparation of regulations is proposed to be carried out immediately.

The discourse on drafting regulations between the Jakarta Provincial Government and ITDP Indonesia, which began in 2020, resulted in Jakarta Governor Regulation (Pergub) No. 36 of 2022 about the Implementation of Integrated Bikeshare for Mass Public Transportation, which has guaranteed the legal certainty of rental bicycle services permanently.

2 Jakarta Bike-Sharing Regulation Points

ITDP recommends that Jakarta should plan for a bike-sharing system, including choosing the technology to be used. ITDP recommends the implementation of Third Generation (docked) and Fourth Generation (dockless) systems to be operated in Jakarta along with supporting facilities such as bicycle units, docking stations, and service areas.

The implementation of rental bicycles in Jakarta, in accordance with the Pergub mentioned before, is directed to use the Fourth Generation rental bicycle service (app-based dockless system). In addition, the regulation also regulates the location of services, types, and specifications of bicycles, and the mechanism for docking station placement.

3 Jakarta Bike-Sharing Business Scheme

3.1. Bike Rental Service Operator

ITDP recommends that bike-sharing services in Jakarta be run using a publicly owned and privately operated business scheme through regional-owned enterprises (BUMD), directed to BUMD in the transportation sector or privately owned and operated, directly implemented by the private sector.

Considering the availability of budget and to accelerate service implementation, the Jakarta Provincial Government decided to adopt a privately owned and operated scheme, with the private sector as the implementing agency and the service operator. Although it will be fully operated by the private sector, the Jakarta Provincial Government will regulate, evaluate, and grant operational authority rights to private operators deemed competent.

3.2. Pricing of Bike-Sharing Service

In determining tariffs, ITDP Indonesia conducted an Ability To Pay/Willingness To Pay (ATP/WTP) study to estimate the lower and upper tariffs for bike-sharing services, differentiating between bicycle types (manual and electric). ITDP Indonesia recommends a lower limit fare for manual bicycles and electric bicycles of Rp3,000 and Rp4,000 per 15 minutes, respectively, with the upper limit fare to be adjusted later, as the amount found from the ATP calculation (which will be used as the upper limit fare) is around Rp16,000 per 15 minutes.

The service tariffs contained in the Pergub were eventually adjusted to the tariffs of rental bicycles from several operators that were still running at that time, so the tariffs were smaller than the study conducted by ITDP Indonesia, which amounted to Rp1,500 and Rp2,500 per 15 minutes for the lower tariffs for manual and electric bicycle fleet types respectively, and Rp3,000 and Rp5,000 per 15 minutes for the upper limit tariffs. However, the Pergub further explains that these rates can be adjusted by the Governor based on a study by Jakarta Transportation Agency.

In addition to tariffs, service providers are also charged a rental rate for docking stations in public areas based on the calculation of the number of bicycle units and rental rate value. This tariff arrangement will be detailed in a cooperation agreement with the Parking Management Unit (UP) of the Jakarta Transportation Agency.

4 Jakarta Bike-Sharing Operational Scheme Planning

4.1. Service Area Planning

ITDP Indonesia recommended the placement of docking stations around public transportation stations to meet the first and last-mile needs. The proliferation of docking stations during the first pilot should lead to the organization of smaller areas within the bicycle service area, divided into units called Service Areas.

The bike-sharing regulation does not strictly regulate the determination of rental bicycle service areas, which has an impact on the use of rental bicycle services. Based on The Bike Sharing Planning Guide (ITDP, 2018), the service area should at least fulfill the following aspects.

- Located around mass transportation nodes
- Located in the city center area
- Land use in diverse areas

Other considerations include the availability of bicycle infrastructure, light traffic, attractive locations, and the direction of development of the area. Rental bicycle services can be organized in areas with bike lanes or sidewalks if there are no bike lanes. Other areas that may be considered for bike-sharing services listed in the Pergub are as follows.

- Residential area
- Road areas designated for car-free days
- Transit-oriented development (TOD) area
- Office district
- Tourism areas
- Mass transportation integrated area.

4.2. Minimum and Operational Service Standards

To ensure the quality of the rental bicycle fleet, ITDP Indonesia recommends developing an Minimum Service Standards (MSS) for rental bicycle services to be included in the Pergub. ITDP formulated MSS for operators in areas such as responding to user reports/complaints, parking orders, condition of unit facilities, technical specifications, data integrity, and regulation of the number of vehicles.

In the Pergub, operators must comply with the MSS listed. The MSS in the Pergub is a development of the original recommendation that adds unit identity, safety aspects, accessibility between docking stations, GPS, and identity at docking stations.

There is also a need for delegation of authority between stakeholders, in this case, the operator and regulator. The operator's duties include compliance with the Service Level Agreement, provision and maintenance of the bicycle fleet, GPS monitoring of units leaving the service area, responsive handling of customer complaints, and socialization of usage and safety guidelines.

4.3. Monitoring and Evaluation

ITDP Indonesia considers it necessary to conduct monitoring and evaluation to gather feedback from the public and operators, inform future bike-sharing activities and review the suitability of the Pergub to find the best bike-sharing scheme for Jakarta.

Handling complaints and reports requires a clear and agreed-upon flow. ITDP Indonesia has formulated a flow of complaint information management from various channels to ensure a quick and accurate response. Regular monitoring and evaluation with customer surveys are conducted to collect feedback from the public and operators as a basis for assessing the effectiveness of policies and determining the direction of the future development of bike-sharing services.

SECOND RENTAL BIKE PILOT

As a follow-up to the ratification of Pergub No. 36 of 2022 about bike-sharing services, Jakarta Transportation Agency, together with ITDP Indonesia, carried out a series of activities towards implementing the Second Rental Bike Pilot as follows.

A. Socialization of Pergub

This socialization was carried out immediately after the ratification of the Pergub, targeting existing and potential rental bicycle operators and government agencies related to rental bicycle services in various aspects. Following the socialization period, the Bike Sharing Summit was held on November 27, 2022, with several objectives:

1. Delivering cross-departmental coordination and policy readiness in implementing rental bicycles in Jakarta.
2. Expanding information to potential rental bicycle operators and other related businesses to implement multi-operator rental bicycle.
3. Providing a connection and networking platform to existing and potential rental bike operators.
4. Developing or creating a business-friendly environment and enhancing the competitiveness of potential bike-sharing service providers.
5. Becoming the promotional media and enabler for various agencies in the Jakarta Provincial Government and other business entities to collaborate.
6. Providing illustrations and potential investment opportunities for rental bicycle business development.

Some follow-ups in this activity are:

1. Contact and assistance in preparing operators who are ready and willing to join system.
2. Preparation of communication networks across related agencies and/or coordinating bodies.
3. Preparation of technical guidance documents and implementation of rental bicycles derived from Pergub No. 36 of 2022, namely:
 - a. Rental Bike Business Model Development
 - b. Financial and Payment Scheme of Bike Rental
 - c. Scheme and Mechanism for Determining Docking Stations and Service Areas
 - d. Scheme and Mechanism for Determining Operators
 - e. Illustration and Operational Scheme of Bike Rental
4. Monitoring and Evaluation Scheme for Bike-Sharing

B. Drafting of External Registration and Internal Administration Flow

An administrative process was established to screen operators interested in the scheme, which was sequenced as follows:

1. Completion of the application form from prospective operators, accompanied by proposal documents as attachments.
2. Submission to Jakarta Transportation Agency to obtain a receipt and application number
3. Meetings, discussions, and field visits (assessment of bicycle unit shelters and planned docking stations) with Jakarta Transportation Agency
4. Assessment of survey results by Jakarta Transportation Agency
5. Prospective operators who do not pass can make corrections and coordinate again with Jakarta Transportation Agency to assess the revised submission points
6. Prospective operators who pass will get a letter of recommendation from the Head of Jakarta Transportation Agency to conduct pilot activities
7. After the bike-sharing activities are successfully evaluated, the operator and Jakarta Transportation Agency can sign a service-level agreement as the first step to permanent implementation

C. Pilot Area Analysis

The operational area of Gowes in the first pilot was considered too large to be controlled by one operator, so the subsequent pilot was directed to a smaller area so that the service could be better controlled. In addition, the existing service area is mainly in the form of a corridor along Sudirman—Thamrin, so it cannot access surrounding areas as a first and last-mile mode.

The approach for the new pilot area began based on the number of public transportation passengers. With the most significant ridership of any mode, Commuter Line stations were selected based on location to the center of Jakarta, street function, and direct connection to the existing bicycle lane network. Three main candidates were identified from the above selection aspects: Juanda, Gondangdia, and Cikini stations.

The three stations were re-selected based on the diversity of surrounding land uses and development directions. Of the three stations, when looking at the cycling radius range, an intersection was found between Gondangdia and Cikini Station in the Cikini Raya area. This made the Cikini Raya—Teuku Cik Di Tiro—R.P. Soeroso area chosen as the pilot area for the initial rental bicycle service. This decision is also supported by diverse land uses, existing conditions that allow the area to be active throughout the day, and existing bike lanes.

Faced with financial constraints on services, in accordance with the Pergub, Jakarta Transportation Agency and ITDP Indonesia is trying to explore alternative funding. One of them is a CSR or sponsorship funding scheme that can be carried out by BUMDs in the transportation sector. However, in a recent discussion, the BUMD Development Agency suggested that this scheme be provided by BUMD sectors that are financially healthier and more stable, such as banking and construction.

CHALLENGES IN ORGANIZING BIKE RENTAL

From the steps that have been taken by the Jakarta Transportation Agency and ITDP Indonesia during the implementation of the pilot activities, several implementation challenges were found, such as:

A. Policy Directions and Priorities of Jakarta

ITDP Indonesia inputs the strong political influence on the implementation of both main and supporting facilities for cyclists, such as the deterioration of Jakarta's bike lanes through 2023. In addition, while Pergub No. 36 of 2022 is a good intention of the Jakarta Provincial Government, it still needs to be reviewed further due to concerns from government agencies and potential operators of bike-sharing services.

B. Availability and Willingness of Prospective Operators

Hearings with prospective operators revealed concerns about funding sustainability, as significant investment is required from operators to deliver a bike-sharing service that complies with Pergub No. 36 of 2022. In addition, some prospective operators still have doubts about the business potential of this service ecosystem, especially related to tariff provisions that do not meet the standards expected by the operators. Some of the latest inputs and information on each operator are as follows:

1. Gowes: It still requires financial support to operate. The Gowes service was completely shut down in 2023 due to financial reasons and business potential.
2. Migo: The fleet planned to operate did not meet the specifications required in the Pergub. After negotiations with Jakarta Transportation Agency, Migo agreed to operate five units of manual bicycles.
3. Boseh: It requires government-to-government cooperation to operate in Jakarta, as the service operations are under the control of the Bandung City Government.
4. Sealog: It has limited knowledge of bike rental services and needs financial support.
5. VRENT: The fleet planned for operation does not meet the specifications required in the Pergub, and has no experience maintaining a fleet that complies with the Pergub. There are also concerns about asset security and financial sustainability when in operation.
6. Pondok Sepeda: It has a vision of becoming a bike rental operator but still needs financial support.
7. Beam Indonesia: The planned fleet is not operating in accordance with the specifications required in the Pergub, and the company is objecting to the tariff scheme required in the Pergub.

C. Field Conditions

The Cikini—Gondangdia area, which was selected as the next pilot area, still has several challenges that need to be followed up in the pilot service later. The challenges encountered during this process are as follows:

1. Cycling safety, especially at intersections
2. Cycling comfort, especially on road sections with manholes over bike lanes
3. Rush hour traffic congestion that could reduce cycling safety and comfort
4. Difficulty in placing docking stations on roads with limited sidewalk width, so docking stations need to be considered to enter building parcels
5. Landowners' mixed responses to docking station plans within building parcels

D. Adjustment to the Minister of Transportation Regulation

In the journey towards the implementation of the rental bicycle service since the release of Pergub No. 36 of 2022 in August 2022, ITDP Indonesia identified several issues that have become the main topics for the implementation of the service, namely the rental bicycle fleet, usage fee, and the financial condition of potential rental bicycle operators.

In an early 2024 meeting with Jakarta Transportation Agency, there was an urgency to continue the bicycle service this year in accordance with the concept of Jakarta as a Global City. To break the “deadlock” that occurred during 2023, Jakarta Transportation Agency decided that the pilot activities would be implemented using the legal basis of the Minister of Transportation Regulation No. 45 of 2020.

Regulatory flexibilities, such as fare exemptions and service fleets, will be applied for the pilot. To ensure the service can accommodate users of all ages, Jakarta Transportation Agency will require the inclusion of manual bicycles in the rental bike pilot service.

CONCLUSION AND FOLLOW-UP

Pergub No. 36 of 2022 was passed to provide a solution to urban mobility by regulating bike-sharing. This regulation provides a stronger foundation and is one of the first national regulation that specifically describes how bike-sharing services can be optimized. However, this Pergub has the potential to be reviewed further and in detail, especially after receiving inputs from various parties. Based on the findings and inputs that have been gathered, ITDP Indonesia has developed recommendations that can be taken into consideration by Jakarta Transportation Agency in organizing bike-sharing activities in general, as follows:

A. Acceleration of Second Pilot Implementation

ITDP Indonesia re-emphasizes the urgency of implementing bike-sharing services with a variety of options available but still strives to be ideally organized in accordance with best practices. This pilot is conducted to test the points outlined in Pergub No. 36 of 2022 and can serve as a basis for implementing the bike-sharing service. The basis for following up on the content of the regulation is to be adjusted to the best service scheme for Jakarta.

B. Adjustments to Bike-Sharing Regulations

The main challenge in implementing the bike-sharing service is determining the operator. On the one hand, there is an urgency to organize the service, but on the other hand, it is also necessary to accommodate the inputs provided by prospective operators. In addition, limitations in the scope of regulation are one of the main factors causing resistance to implementing this service.

Therefore, some regulatory aspects need to be clarified or added in Pergub No. 36 of 2022 to ensure the sustainability of the rental bicycle service. Thus, a well-regulated rental bicycle system can assure business entities that the government can establish effective and efficient cooperation.

