

Regulatory framework governing micro-mobility

State of the art and future developments

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What do we do at TIER?

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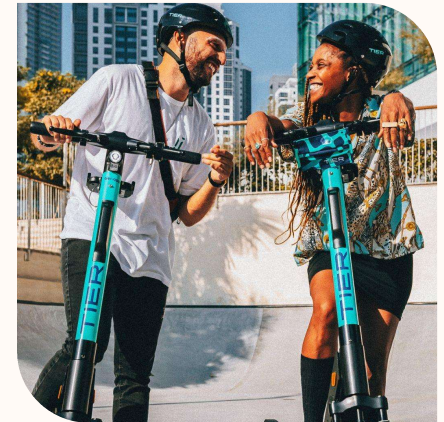
Introducing TIER

TIER Mobility

- **Leading multimodal European** micro-mobility operator
- **Founded** in 2018, **1,400+** Employees
- **First** climate-neutral operator
- **Acquisition of European bikeshare leader Nextbike** to create Europe's largest and most diverse micro-mobility provider



1350,000 vehicles



33 countries

560+ cities

TIER and micromobility's **role in the sustainable mobility transition:**

- Replace cars with a **multimodal offering**
- Act as an **extended arm to public transport**
- Continuously **improve environmental performance**
- Shaping sustainable **urban environments**



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Regulatory framework

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How is micro-mobility regulated across Europe?

State of the art

- There is currently **no uniform regulatory framework**.
- A certain level of regulatory uniformity can be achieved with **new European vehicle legislation (under discussion)**
- Uniformity could be achieved also on selection procedures of providers through the **application of the European directives on public procurement**.

Vehicle regulation

Vehicle standards vary in countries across the EU. The European Union started working on an harmonization of the rules.

Traffic rules

The competence lays with national governments. A level of uniformity could be reached categorizing e-scooters as bicycles.

Selection procedures

Licenses
"Special Licenses"
Tenders

>nature of the service to be clarified

Other measures (e.g insurance, high fees)

Harmful regulation adopted due to the poor reputation of the industry.

What are the main challenges?

Fragmentation of the regulatory framework

Micro-mobility is regulated very differently across EU Countries. For example in relation to technical standards/classification.

Lack of clarity on competences/enforcement

Confusion on roles and responsibilities for the enforcement of local and national traffic rules.

Lack of vision

Cities seem not to look at the full picture. Harmful regulations are adopted in a tactical manner and have the sole effect of damaging micro-mobility services.

Adoption of harmful rules

Tendency of discriminating shared micro-mobility (especially e-scooters) versus other modes of transport (e.g. imposition of high fees for public space occupation).

Examples of good regulation

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Examples of good regulation

Berlin - a dynamic system of fees

Fees structure in the city of **Berlin**

- fees only applied to the inner city, while use of public space in the outskirts is free of charge.
- The city committed to using the fees for investments in micro-mobility infrastructure such as dedicated micro-mobility parking spots and lanes.



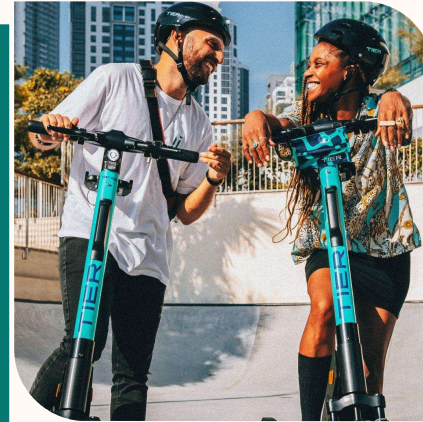
Examples of good regulation

Malaga - quality rather than price

The City of Málaga (Spain) in selection procedures of micro-mobility providers lightened the weight given to financial criteria. This is to avoid that operators would simply 'buy' the tender at the risk of providing an unsustainable service. Also, with this measure the city ensured that the quality of operators was the decisive factor for the tender award.



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Section Header

Examples of good regulation

London - Congestion Charge to support public transport

Initiated in 2003, London's congestion charge system aims to reduce inner-city traffic and prevent pollution.

The system requires a daily charge for people driving within an eight-square-mile zone of central London.

Revenues are used to support London's transport system. The zone was extended to parts of west London in 2007.

Congestion charging contributes £ 50m to London's economy, mainly through quicker and more reliable journeys for road and bus users.

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Future developments

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Measures to favor the the uptake of sustainable transport modes

Adoption of harmonized rules

E-scooters, e-bikes and bicycles should not be regulated in a different manner to ensure consistency for users, cities and those enforcing traffic rules.

Avoidance of discriminatory measures

Cities should refrain from imposing special requirements, like automated slow-speed zones or from placing undue economic burden on shared micro-mobility only.

Subsidies for sustainable transport modes

Fees on the use of heavy vehicles can be used to subsidize sustainable modes like shared micro-mobility and public transport. This would ensure wider mode shift and the achievement of environmental sustainability goals.

Choice of the right criteria to select operators

This includes quality of service, quality of partnership, evidenced experience, economic and environmental sustainability, and safety – rather than an evaluation based on price and minimum compliance.

Any questions?

Change Mobility for Good.

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