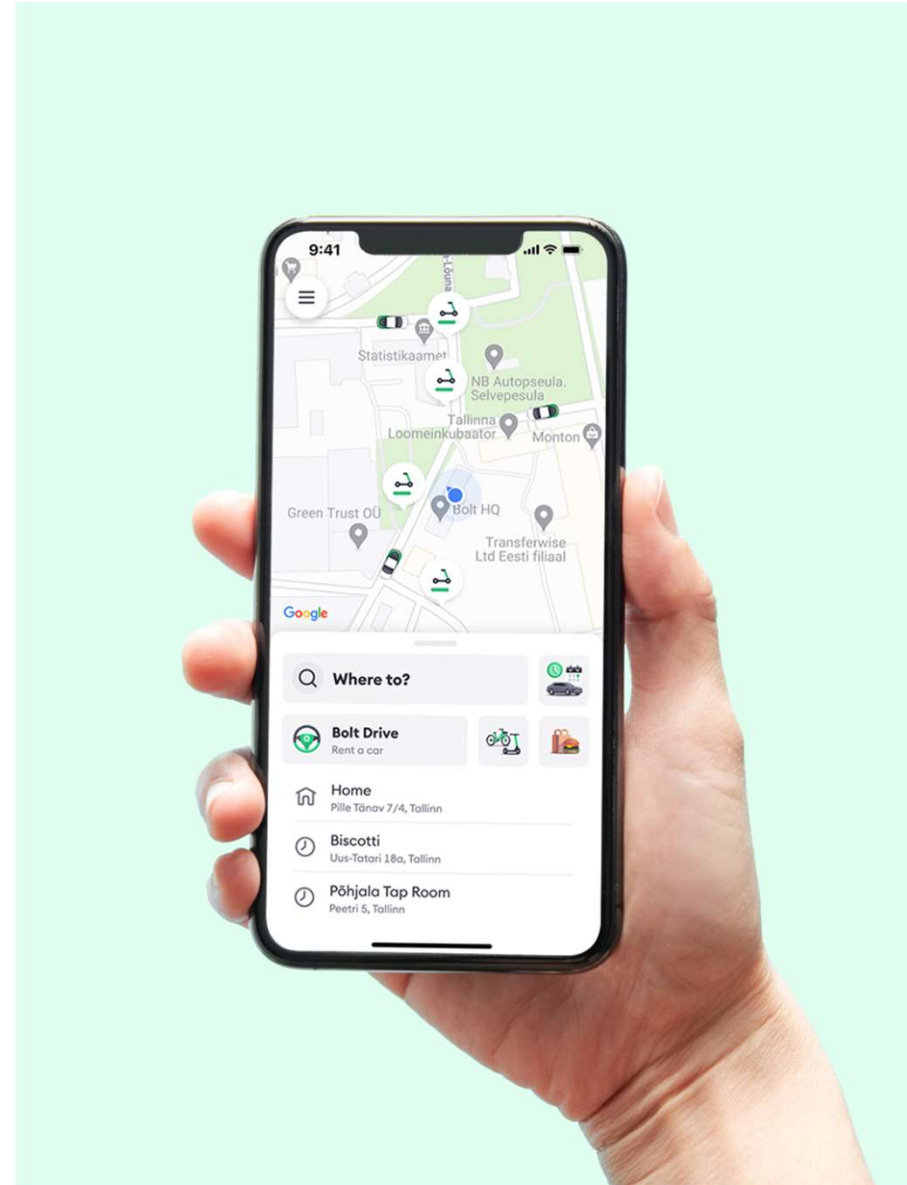




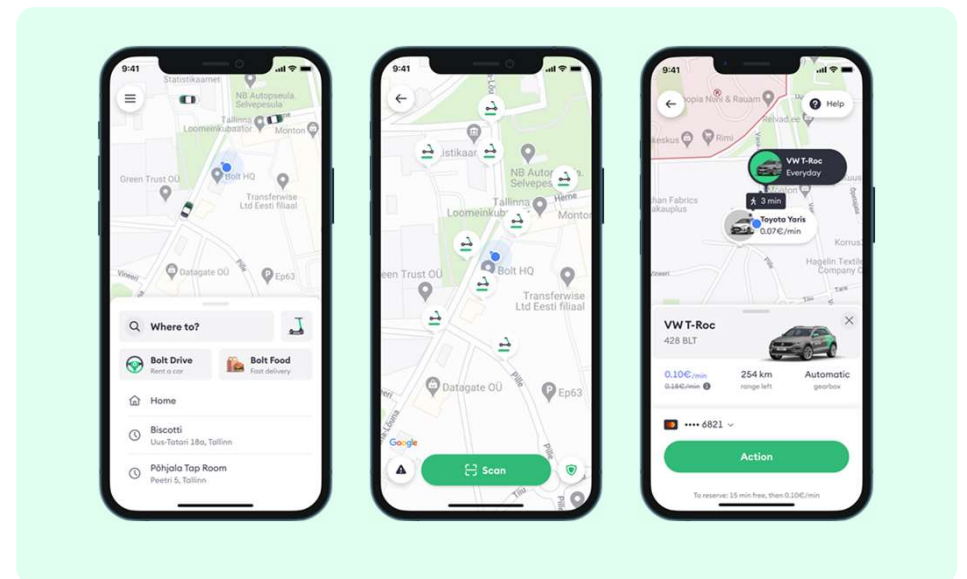
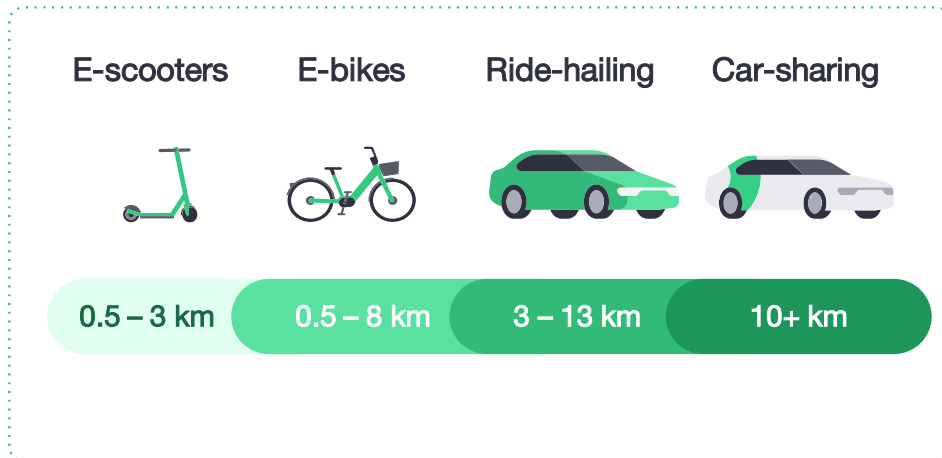
# UNLOCKING SHARED SCOOTER POTENTIAL

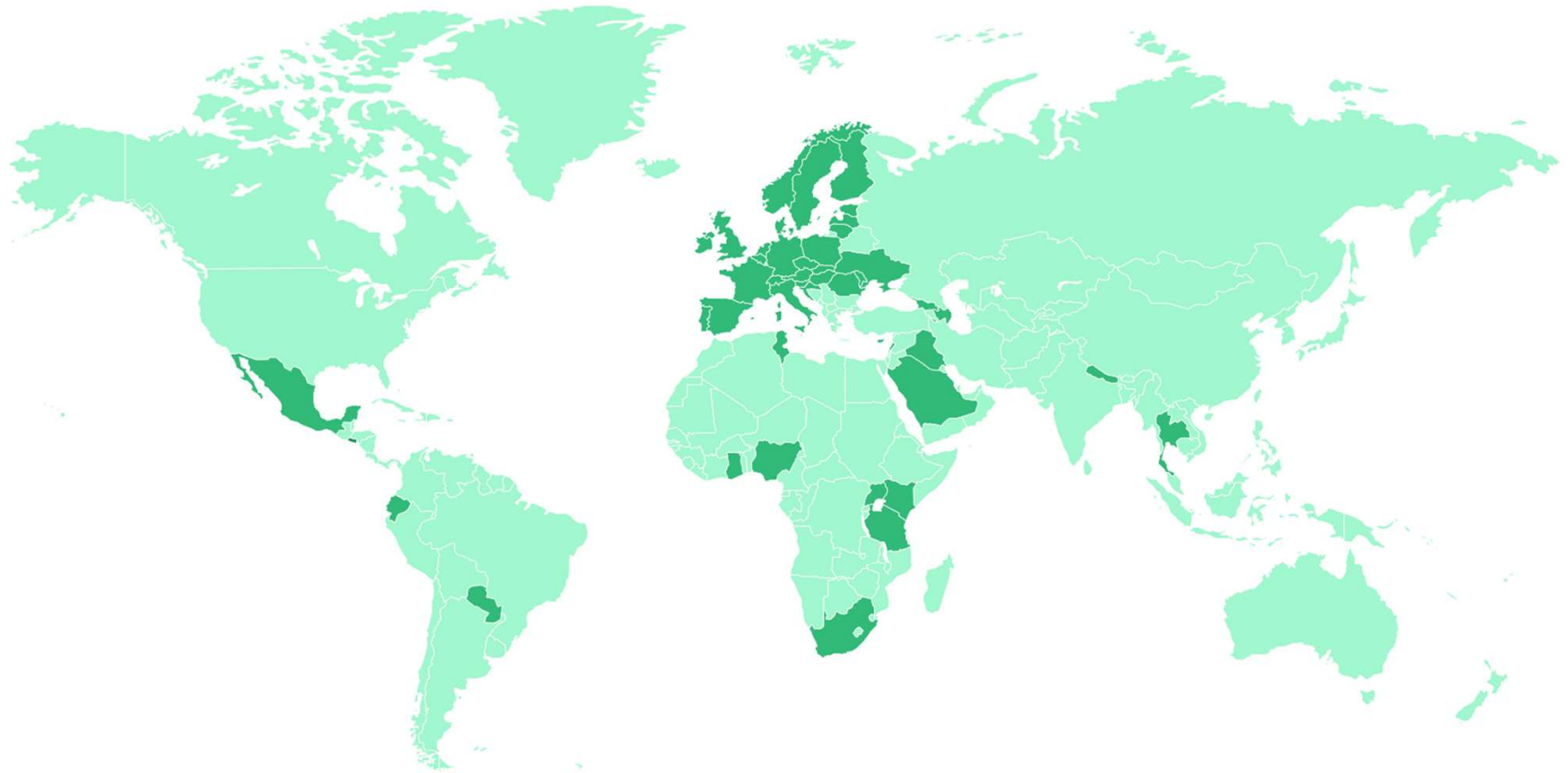
A comparative analysis of regulatory models

Eirini Zafeiratou  
VP of Global Public Policy and Regulatory, Bolt  
30 November 2023 @ POLIS Annual Conference, Leuven, BE



# Bolt – Europe’s shared mobility champion



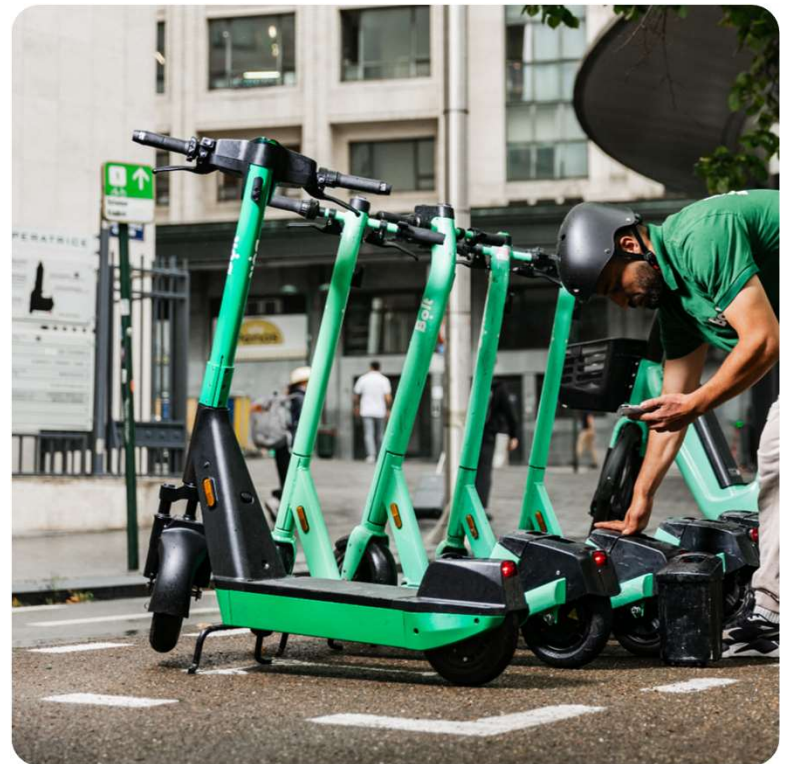


**150+ million**  
customers

**500+ cities**  
45+ countries

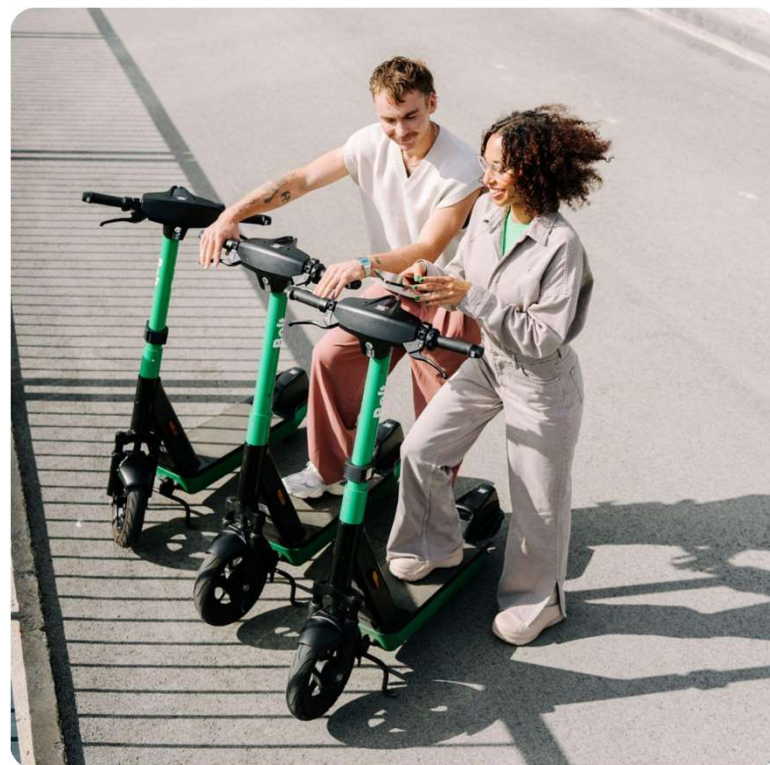
# Some common questions since **first shared scooter** services were launched in 2017...

- **How should cities regulate** micromobility services?
- **How to maximise** their benefits?
- **How to ensure compliance** with local rules?



# A need for evidence based **decision making**

- Lack of **empirical research** on the impact of micromobility regulation
- **No data on the advantages and disadvantages** of different regulatory models
- **Need to develop public debate** around micromobility regulation



# First comprehensive study on the **impact of micromobility regulations**

- **Data based assessment of impacts** on cities and their citizens
- **Recommendations** for local policymakers



# The research in a nutshell

State of the regulatory  
landscape

Impact and cost for cities

Impact and cost for users

Literature review

Interviews with city officials

Survey among policy makers

Qualitative data

Industry aggregated data

What's the state of micromobility regulation in Europe?



# Three categories of regulatory models

**LIGHT REGULATION**  
OPEN MARKETS & MOU

**MEDIUM REGULATION**  
AUTHORISATION REGIMES

**HIGH REGULATION**  
TENDERS

20%

46%

34%

66%

# Why do cities regulate micromobility?

Despite the benefits of micromobility services...

- **Reduced** car traffic
- More **sustainable mobility**
- **Multimodality** effect and connection with **public transport**
- Affordable **mobility for all**

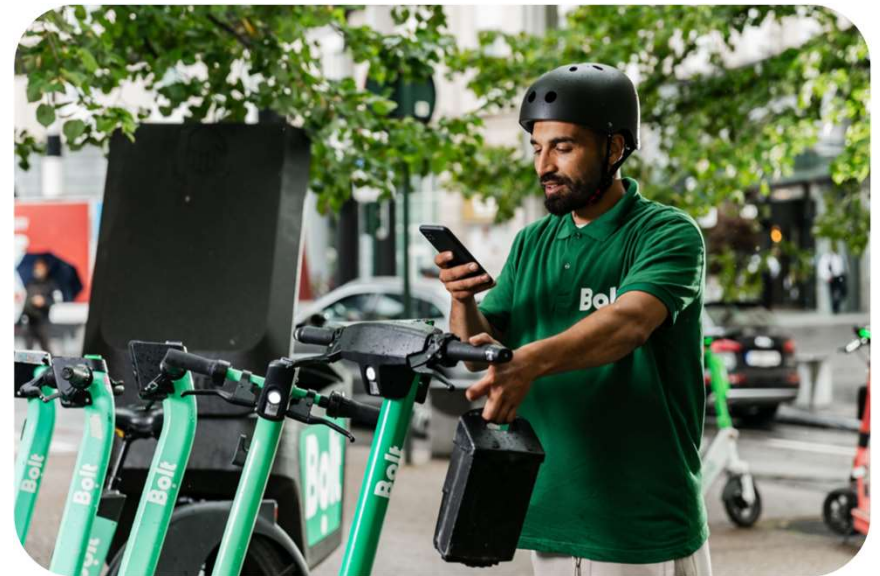
... two key challenges remain

- **Parking** compliance
- **Safety** perception

# Higher regulation **equal higher control?**

Cities use similar control tools in **all three models**

- mandatory parking zones
- slow speed areas
- technological requirements
- hardware requirements
- possible fleet caps
- etc



What's the impact on cities?

# Higher regulation equal higher costs for cities



What's the impact on citizens?

# Restricted competition means **less benefits** **for citizens**

- High regulation leads to higher prices
- Hard fleet caps reduce availability and adoption



Unrealised benefits **from micromobility**



What's next?



Thorough analysis of all models

# Light and medium regulation

# Dynamic fleet caps

# Four operators

A hand holding a smartphone is the central visual element, overlaid with a semi-transparent green filter. The phone's screen shows a list of items, possibly a shopping list or a document. The background is a blurred image of a person's hands holding a similar device.

# Thank you!

**Stijn Vandeweyer**  
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**Sebastiaan Boschmans**  
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