

Micromobility Industry Best Practice

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Introduction

Shared micromobility services have spread rapidly, providing safe, affordable, and low emissions mobility at low cost to cities. As cities move from pilot programmes to permanent regulations, the leading micromobility companies have come together to provide insights from our services around the world. Our recommendations are designed **to ensure cities receive safe and well-managed mobility services that can be sustainably delivered in the long term**. The sections in this stance should be read collectively as together they create good conditions for the industry.

Programmes that achieve these goals have common features:

Administration

- 1. Appropriate number of operators to avoid oversaturation of a market and provide healthy competition, customer choice, and easy administration for Cities**
 - a. As a general guideline, in markets with >1000 scooters, at least two operators and a maximum of 3 operators per market with the following recommended ratios:
 - i. 1,000-2,000 scooters in total: max 2 operators
 - ii. 2,000+ scooters in total: max 3 operators
 - b. These are guidelines. Actual thresholds depend on the local market conditions
- 2. Fleet size that balances reliability with tidiness**, starting with a manageable initial fleet and growing in line with the success of the programme and compliance with city priorities
 - a. Subject to the number of operators, initial total fleet size recommendation of 80 to 120 vehicles/sq.km growing in line with demand and compliance to at least 200 vehicles/sq.km assuming limits on the number of operators as specified above
 - b. Fleet growth tied to operator performance alongside metrics measuring compliance with city priorities (tidiness, responsiveness, maintenance, etc.)
- 3. Programme and contract length long enough for riders and operators to rely on the availability of micromobility**
 - a. A minimum of a two year contract term for pilots and three to four years for permanent programs. This gives appropriate time to allow for set up and evaluation of services, whilst giving long term confidence for the public to adopt micromobility. Contracts of this length also encourage operators to make longer term investments in cities where they operate
- 4. Fees covering the reasonable and transparent costs of programme administration and public space occupancy, consistent with fees paid by similar modes**
 - a. If a fee is imposed, a fixed annual fee per e-vehicle, consistent with fees paid by existing services like bike-share. Fees should recognise that, unlike many alternative schemes, e-scooter schemes are typically not subsidised
 - b. Fees should be set prior to vendor selection and applied consistently across all operators. This avoids negative outcomes such as operators overpromising on financial commitments, legal concerns over excessive fees, and operators winning bids and then withdrawing from the market due to unsustainable fees
- 5. Uniform and automated data sharing through MDS and GBFS protocols, which are designed by and for cities and the most common methods used today**
 - a. MDS and GBFS facilitate easy and consistent submission of information to cities across operators and easy utilisation of data by cities. MDS and GBFS are designed to protect rider privacy by excluding directly identifiable person data, keeping personal information safe and protecting cities from the threat that hackers will gain access to sensitive information

- b. MDS and GBFS are continually updated to ensure cities are getting state of the art data feeds without requiring dedicated city resources
- c. With uniform data sharing requirements, operators are able to spend more time working with cities to provide useful data for monitoring and evaluation, and less resource spent building bespoke data provision

6. Selection processes designed to identify the operators best suited to provide quality service over the long term, tailored to a city's unique needs

- a. In mature markets, tenders are the structure best suited to selecting the most appropriate vendor to serve a city's needs. Tenders also ensure a scheme is easily administered by the city and improve accountability for service delivery
 - i. Licence structures and "free market" models are less desirable as they encourage the oversaturation of operators and vehicles, and poorly managed fleets. The administrative costs of administering an oversaturated scheme are also likely to be higher for a city than in a controlled scheme selected via open tender
- b. Tenders should draw on the experience of other procured services and ensure that operators are selected according to the quality of service provision
 - i. Operators should never be selected based on financial contribution ("city fees", "level of investment" or "user pricing"). It would create unsustainable market conditions and should be avoided. This leads to likely negative outcomes for cities, such as operators overpromising in tenders or failing to deliver a quality service because the business is not economically sustainable. In the worst case, operators will abandon markets which are financially unsustainable - leading to service failure or a major gap in provision
- c. Reliability, safety, sustainability, and fleet management should be the core criteria for selecting operators
 - i. Where relevant, cities should require evidence of delivery in comparable cities to support claims made by operators in tenders or application documents
- d. Tender criteria (and regulations) specifying outcomes are preferable to requiring specific technology or operational practices, especially those that are just emerging and may not be applicable to the city's unique needs
 - i. Outcome-based and technology-neutral requirements encourage operators to bring their experience and creativity to provide great service and curb negative externalities like antisocial behaviour (sidewalk riding, tandem riding, misparking, etc.). This encourages innovation based on local conditions and new practices as they emerge
 - ii. Tenders or regulations which specify technological solutions to be implemented risk limiting innovation, and cities becoming stuck with outdated regulations based on legacy technologies

Operations

7. Operating area that maximises access to destinations throughout the city

- a. Operating areas contiguous with the city boundaries are preferable to connect residents and visitors with destinations anywhere across the city
- b. If a whole city operating area is not feasible, operating areas should be contiguous and connect people in local neighbourhoods with the important centres of the city (cultural, business, recreational)

8. Ample parking conveniently located close to where riders start and end their trips increases use, reliability, and tidiness

- a. There are many different parking options. Density, existing infrastructure and pedestrian patterns inform what will be most effective in any given city
 - i. **Mandatory parking in dedicated, physical parking spots**
 1. Suited for dense urban areas
 2. Minimum of 40 parking bays/sq.km
 3. Minimum of 3 parking spots for each scooter (i.e. 1000 vehicles means space to park 3000 vehicles)

ii. Stationless parking

1. Suited for less dense areas or where parking infrastructure (incl. racks and painted bays) is not sufficiently available
2. Needs clear rules about safe parking
3. No parking zones in sensitive or highly pedestrianised areas

iii. Hybrid system is a practical way for cities to start and experiment

1. Mandatory parking in physical spots in the city centre, stationless parking in less dense areas
- b. A practical system which corresponds to standard urban forms

9. Speed between 20-25 km/h to ensure the safety of riders

- a. 20-25km/h is consistent with other vehicles like bikes or e-bikes, allowing for safer riding that aligns with the pace of traffic
- b. Speeds capped below 20km/h increases safety risks as the average speed is set substantially lower than other vehicles on the road
- c. Riders are more likely to ride on sidewalks where the speed is too low (below 20km/h)

10. Helmets should be encouraged, but not mandatory. Helmet requirements discourage the uptake of micromobility, may exacerbate social inequalities, and create disproportionate enforcement costs without resulting in higher helmet usage rates. In the wake of COVID, riders are also reluctant to use shared helmets

- a. Although the use of private helmets should be encouraged, multiple research studies show that mandatory helmet requirements discourage people from using micromobility, including bicycles
- b. Riders are reluctant to use shared helmets - particularly in the wake of the COVID-19 pandemic
- c. Evidence shows that drivers are more likely to drive closer to riders wearing helmets. Likewise, riders wearing helmets are inclined to take greater risks
- d. Evaluations of mandatory helmet laws indicate the costs of implementing mandatory helmet laws outweigh the benefits with negligible improvement to helmet-wearing rates
- e. Research has shown that helmet-wearing mandates correlate with exacerbated social inequalities including impacting uptake among lower-income groups who may be unable to purchase their own helmets, leading to higher likelihoods of underprivileged groups being disproportionately affected by penalties for non-compliance, and/or reduce accessibility for social groups that wear cultural or religious headgear
- f. Evidence indicates no reliable correlation between mandatory helmet laws and improved rider safety

All operators part of this multi-operator working group remain competitors, independent of each other in their strategy and decision-making, and strongly abide by applicable competition laws. The sole purpose of this joint effort is to provide the best standards and practices to enhance the customer experience, health and safety, and sustainability of the micromobility industry.

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