fluctuo

EUROPEAN SHARED MOBILITY INDEX

— OCTOBER 2021 —

16 CITIES
285 SERVICES

20 OSLO

14 STOCKHOLM

21 HAMBURG

14 LONDON

14 ROTTERDAM

18 BRUSSELS

24 BERLIN

10 WARSAW

13 PRAGUE

21 PARIS

23 BORDEAUX

14 VIENNA

21 MILAN

23 MADRID

20 BARCELONA

15 ROME

SHARED MOBILITY
BY Nº. AVAILABLE SERVICES

Bikes (station-based)
Shared bikes available at fixed locations, either physical or virtual stations

Bikes
(free-floating)

Scooters
also known as
"kick scooters"

Mopeds
or motorscooters

Cars

x Total n° services

BACK IN BUSINESS

Shared mobility has got its mojo back! With pandemic restrictions easing and economies re-opening, European operators have found their rhythm again. This means the normal seasonal decline in ridership as winter arrives but the popularity of shared mobility continues to smash records, even after sustained levels throughout the summer months. In particular, the number of total recorded trips on shared vehicles increased by 25% between Q3 and Q2. There were almost 2 million extra trips in September 2021 than in the same period last year. The mix of the shared vehicle fleet is changing too. There are more shared scooters on European streets than shared bicycles; scooters now account for almost half of all monitored vehicles in the Index.

The period also saw increased regulatory activity from city authorities and operators are responding creatively.

Multi-modality has been a clear trend in Q3 as operators diversify their fleets and launch complementary services in new markets. The spectre of new competitive tenders in key cities may also be stimulating activity as operators jostle to gain a foothold in the few markets that remain open to unregulated competition. Winter is coming in Europe but shared mobility is just getting warmed up.
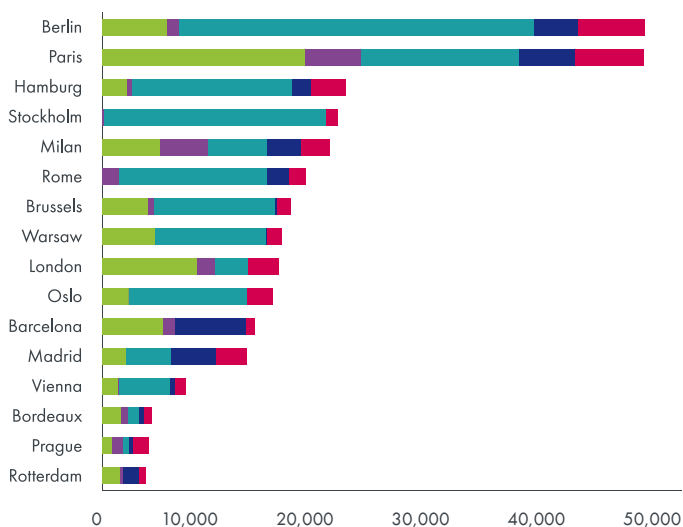
280,000
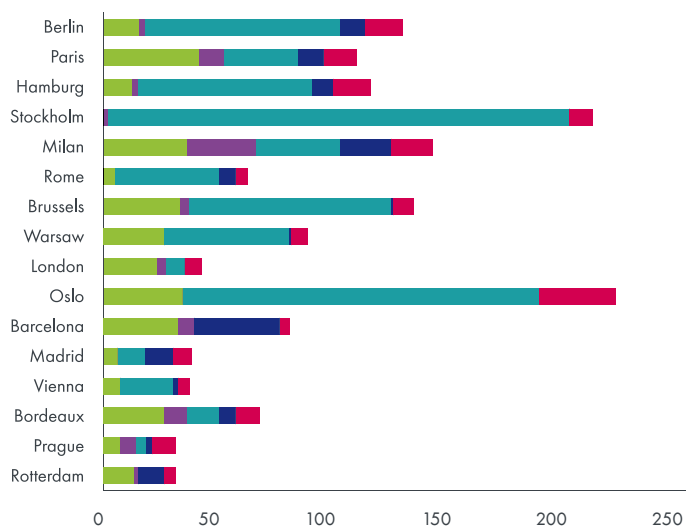SHARED VEHICLES

FLEETS
+4%
SINCE JUNE 2021

TRIPS
+3%
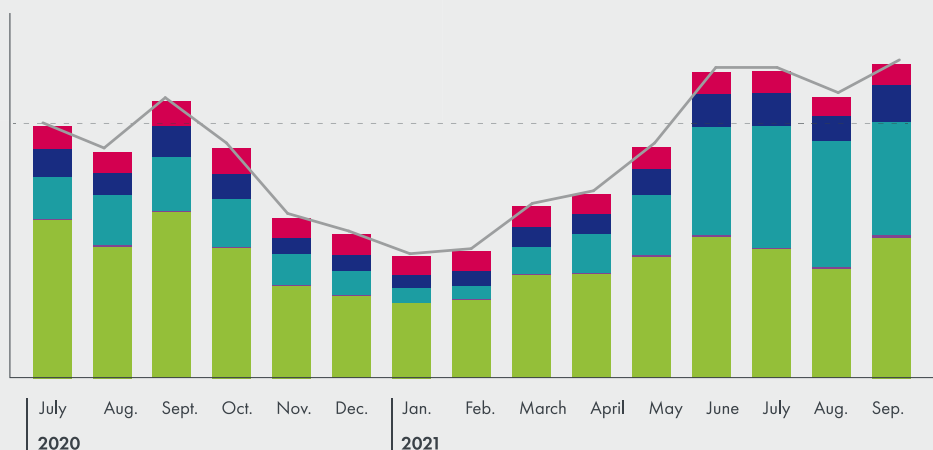SINCE JUNE 2021

TOTAL SHARED VEHICLES
As at September 2021

Berlin
Paris
Hamburg
Stockholm
Milan
Rome
Brussels
Warsaw
London
Oslo
Barcelona
Madrid
Vienna
Bordeaux
Prague
Rotterdam

0 — 10,000 — 20,000 — 30,000 — 40,000 — 50,000

SHARED VEHICLES PER 10,000 INH.
As at September 2021

Berlin
Paris
Hamburg
Stockholm
Milan
Rome
Brussels
Warsaw
London
Oslo
Barcelona
Madrid
Vienna
Bordeaux
Prague
Rotterdam

0 — 50 — 100 — 150 — 200 — 250

EVOLUTION OF RIDERSHIP
Q3 2020 to Q3 2021 - Base 100 / July 2020

Total

July Aug. Sept. Oct. Nov. Dec. Jan. Feb. March April May June July Aug. Sep.
2020   2021

BIGGEST MOVERS
Ridership - Sep 2021 vs Jun 2021

+42%   **+37%**   **+30%**   **-42%**

BERLIN   HAMBURG   STOCKHOLM   OSLO
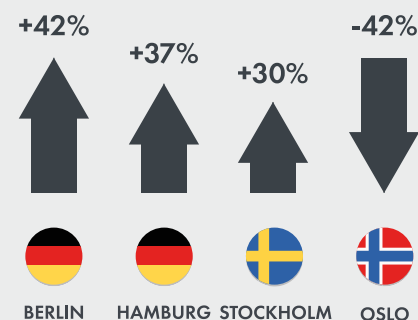
LAUNCHES & EXITS

GOVERNMENT

INDUSTRY

JULY

PRAGUE | Bolt launches with an initial fleet of 200 scooters.

BERLIN | felyx deploys 1,500 mopeds in its biggest launch to date.

ROTTERDAM | Juuve merges with **MyWheels** to offer a combined 1,700 shared cars in the Dutch market.

HAMBURG | BOND withdraws its shared bikes prior to bankruptcy filing.

WARSAW | nextbike awarded contract extension to operate the public **Veturilo** service, until Nov '22.

MADRID | City Hall extends scooter licences for the fourth time.

ROTTERDAM | Public transit operator RET successfully integrates **Lime**, **Check**, **felyx**, **GO Sharing**, **Donkey Republic**, **BAQME** and **MyWheels** into its MaaS app.

Donkey Republic's bikes and **TIER**'s scooters integrated into Google Maps; **Bird**, **Spin** and **Voi** all follow in August.

Dubbed the "biggest ever MaaS integration", **Lime** integrates its multi-modal fleets into **Moovit**'s journey-planning app in 117 cities.

Moovit integrates **Getaround**'s carsharing services in UK, France, Belgium & Germany.

AUGUST

WARSAW | TIER launches with an initial fleet of 1,000 scooters.

BARCELONA | Cooltra relaunches with approx. 100 ebikes.

ROME | 130 Fiat 500Xs are added to **SHARE NOW**'s fleet of shared cars.

BERLIN | Spin targets outer suburbs with launch of 120 scooters.

BERLIN | The PTA's **Jelbi** app targets outer-suburban mobility with new multi-modal stations and app integration with **Lime**.

PRAGUE | Government agency PID offers public transport users 15 free minutes on **nextbike**'s bikeshare as part of app integration.

STOCKHOLM | CityBike and **VAIMOO** win Stockholm's long-awaited public bikeshare tender.

Cityscoot extends app integration with **Uber** to Barcelona market.

SHARE NOW integrates its car sharing fleets with **FREE NOW** across Germany, Italy, France and Spain.

Cabify absorbs **MOVO** fleets in Barcelona and Madrid under single multimodal app.

TIER and **FREE NOW** extend app integration partnership to Vienna.

SEPTEMBER

OSLO | Dott launches just days before new scooter rules.

BRUSSELS | Voi enters market with 1,000 scooters.

LONDON | HumanForest re-launches its bikeshare service with 800 free-floating ebikes.

MADRID | An initial fleet of 30 scooters offered by **Reby**.

BORDEAUX | 200 electric mopeds launched by **Cityscoot**.

OSLO | new scooter regulations take effect with city-wide cap of 8,000 scooters divided equally among 12 operators.

STOCKHOLM | City authorities legislate new scooter fee of SEK 1,400 (€140) per vehicle.

MADRID | City Hall is accused of underinvesting in **Bicimad**'s workforce as the public system sees 6,000 shared bikes vandalised in 2 weeks.

Voi and **FREE NOW** launch partnership for app integration in French markets.

Lime integrates both scooter and bike services under **Uber**'s app in Milan.

Cooltra partners with **Just Eat** to supply 1,000 e-scooters/mopeds for food delivery across 30 Spanish cities.

SPOTLIGHT ON PARIS

Despite Paris already topping the list of shared mobility cities, change is in the air. City Hall caused a stir in 2020 when it limited Paris' lucrative scooter-sharing market to just three lucky winners. Shared mopeds appear to be next. Moped-sharing is booming in Paris: in the last 6 months, the number of operators has risen from 2 to 5 and the city's shared moped fleet has grown by 60%. Unsurprisingly, this has raised the question of parking restrictions and a possible tender process, with the Mairie de Paris preparing a new regulation for 2- and 3-wheel shared vehicles in the coming weeks. Little wonder then that Lime, Yego and Cootra are now jostling for position against Parisian incumbents Cityscoot and Troopy. With Dott already disrupting Paris' bikeshare market in October, it's clear that the competition in Paris is only just heating up.

FINANCING

€39 M	**Voi** (Series C)
€22 M	**Helbiz** (IPO)
€20 M	**Green Mobility** (rights issue)
€2,7 M	**Human Forest** (pre-Series A)
€1,3 M	**Zipp Mobility** (seed funding)
€0,4 M	**BAQME** (crowdfunding, 35min)

SMART MOBILITY
FOR THE MODERN WORLD

Everything we do at Lime supports our mission to create a future of transportation that is shared, affordable and carbon-free. Through the equitable distribution of shared scooters and bikes, we aim to reduce dependence on personal automobiles for short-distance transportation.

We have the conviction that cities are leading the ecological transition and we are actively participating in this transition by offering European cities the most sustainable micromobility service possible, from the design of our scooters and bikes, to their local operational management.

Named a TIME100 Most Influential Company, Lime has powered more than 250 million rides in more than 200 cities across five continents. We are not only providing cities with a sustainable mode of transportation but actively collaborating with city leaders, public transport authorities, and civil society to facilitate the harmonious integration of our service in a holistic system of transportation. We are continuously improving our service and its integration into urban space and expanding our service across Europe and globally to continue accelerating the shift to cleaner modes of transportation.

3 years as the European leader of micromobilty.

Launched in 2018 in Europe, our shared electric scooter and bike rental businesses quickly found their audience and cities have also rapidly embraced the value of micromobility, building more infrastructure which has proven to be key in boosting the shift from motorized to zero emission micromobility options. For example, we now count 3 million unique users in Paris and more than 30 million trips completed in 3 years. Our service has gradually found its place in the European transportation network: we are integrated with BVG in Berlin and with Bonjour RATP in Paris from January 2022.

What's next? Technology innovations for safety and respect for public space.

After more than three years of experience in Europe, we are continuing the transition of our fleet of vehicles to models with swappable batteries, as we are focused on decreasing our carbon footprint across our whole value chain: you'll find our latest generation of green and white scooters and bikes in more and more cities, starting with Paris at the end of 2021.

We are also deploying cutting-edge, functional and efficient technological innovations to regulate the behavior of our users and ensure compliance with parking regulations.

Finally, we are strongly investing in educating riders: in app but also through campaigns and events, or by building partnerships with driving schools. We have developed a range of educational, hardware and technological solutions to increase rider safety including a feature to limit sidewalk riding.

New sustainability achievements.

To reinforce the sustainability of our service, we attach particular importance to reducing its environmental impact at every stage of its lifecycle, as a carbon-free mode of transportation. In October 2021, we reached an important milestone: our science-based carbon target has been independently validated by the Science Based Targets Initiative.

Ghassan Haddad
Head of Public Policy & Communications,
EMEA Lime

BIKE SHARING

N° of services available

GROWTH IN TOTAL BIKES

June 2021 vs September 2021

Paris
London
Milan
Berlin
Barcelona
Warsaw
Brussels
Hamburg
Oslo
Bordeaux
Madrid
Prague
Rotterdam
Rome
Vienna
Stockholm

Jun' 2021   Sep' 2021

0   5,000   10,000   15,000   20,000   25,000
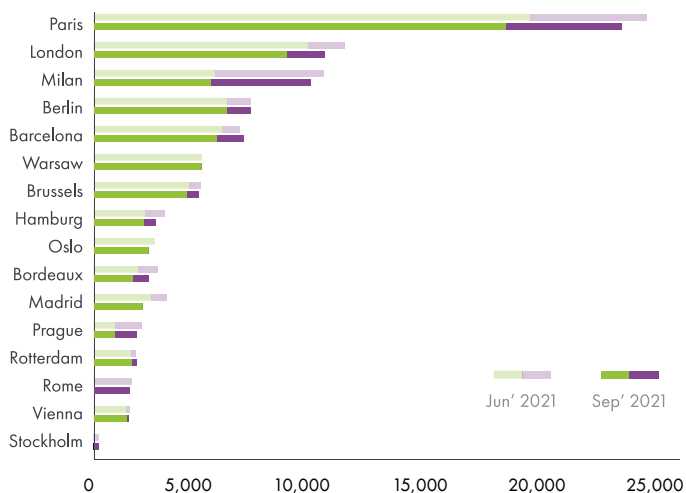
SHARED BIKES PER 10,000 INH.

Approx. September 2021

Paris
London
Milan
Berlin
Barcelona
Warsaw
Brussels
Hamburg
Oslo
Bordeaux
Madrid
Prague
Rotterdam
Rome
Vienna
Stockholm

0   10   20   30   40   50   60   70   80

EVOLUTION OF RIDERSHIP

Base 100 / July 2020

125
100
75
50
25
0

2020   2021

July Aug. Sept. Oct. Nov. Dec. Jan. Feb. March April May June July Aug. Sept.

— Average (all modes) — Bike (sb) — Bike (ff)
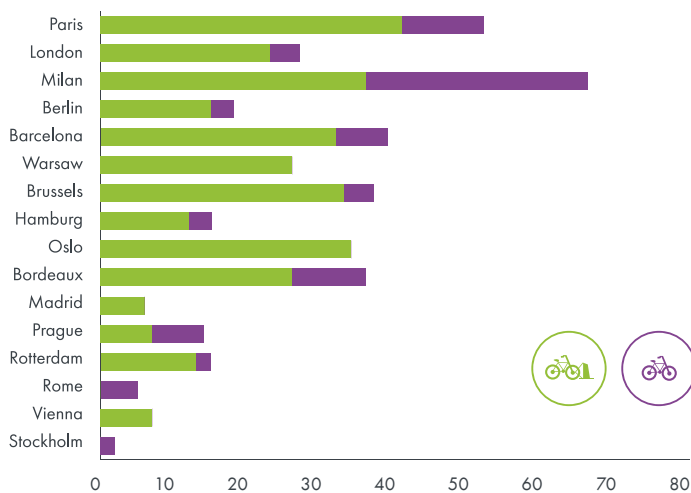
HOTSPOT

Most shared bikes per 100m² (30 Sep)

PARIS
CHÂTELET/LES HALLES
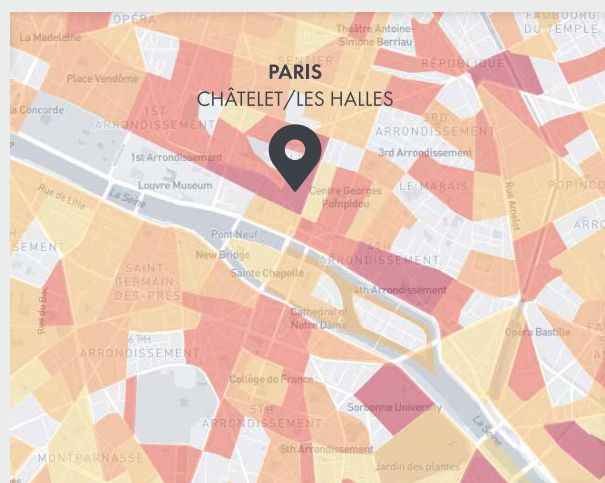
N° of services available
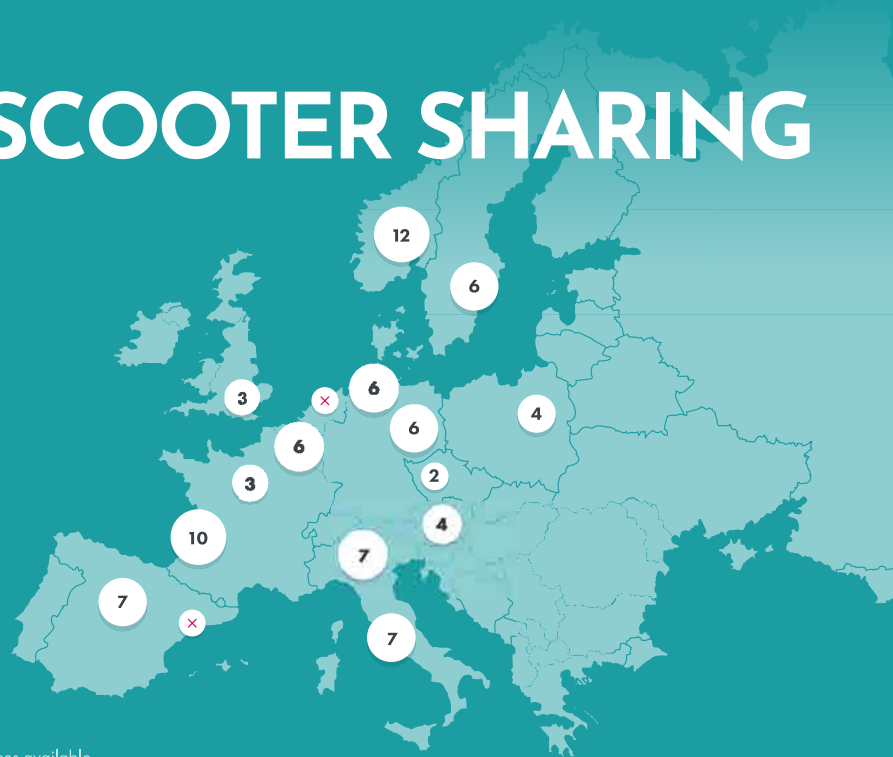
GROWTH IN TOTAL SCOOTERS

June 2021 vs September 2021

Jun' 21   Sep' 21
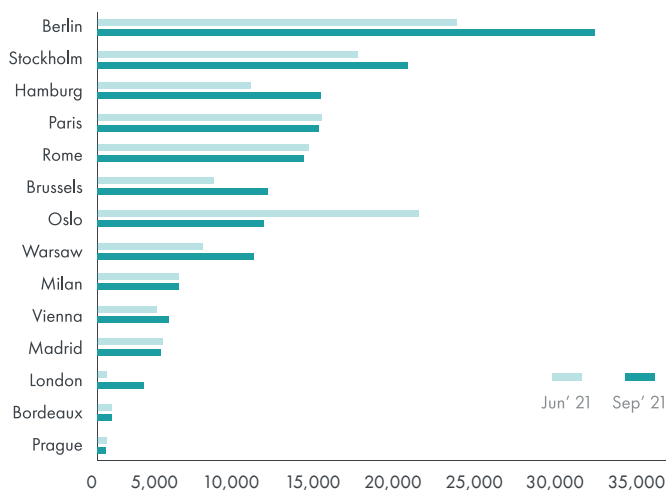
SHARED SCOOTERS PER 10,000 INH.

Approx. September 2021

EVOLUTION OF RIDERSHIP

Base 100 / July 2020

— Average (all modes)   — Scooter
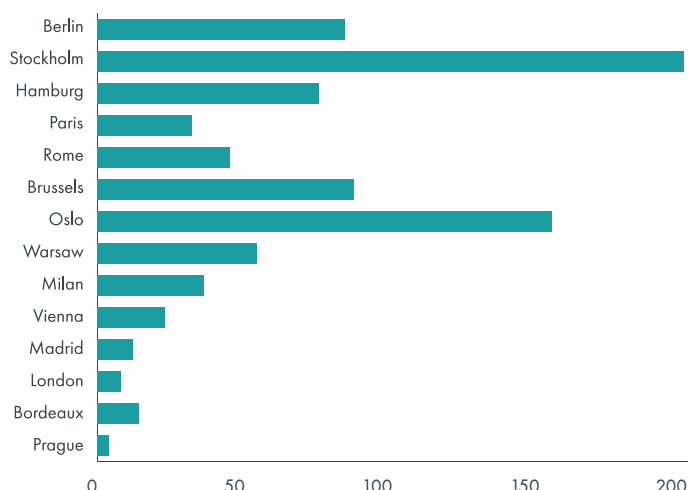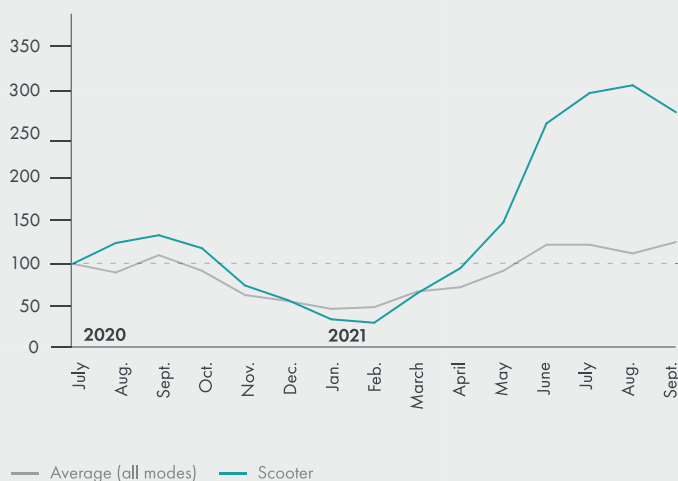
HOTSPOT

Most shared scooters per 100m² (30 Sep)

STOCKHOLM
STUREPLAN
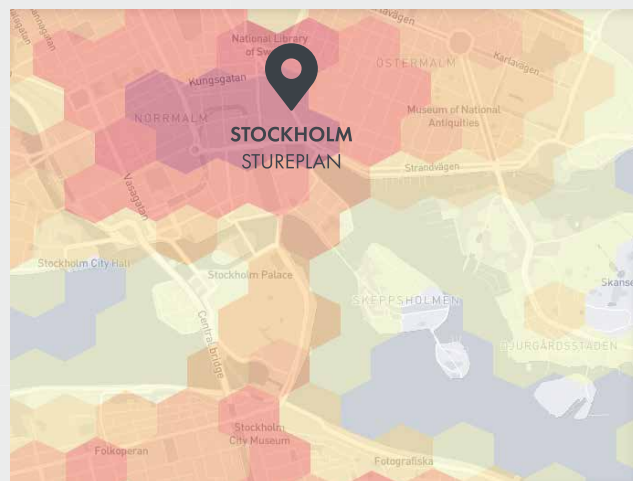
SNAPSHOT 🛵 MOPED SHARING

N° of services available

GROWTH IN TOTAL MOPEDS
June 2021 vs September 2021

Barcelona
Paris
Berlin
Madrid
Milan
Rome
Hamburg
Rotterdam
Bordeaux
Vienna
Prague
Brussels
Warsaw

Jun' 21   Sep' 21

0   1,000   2,000   3,000   4,000   5,000   6,000   7,000   8,000
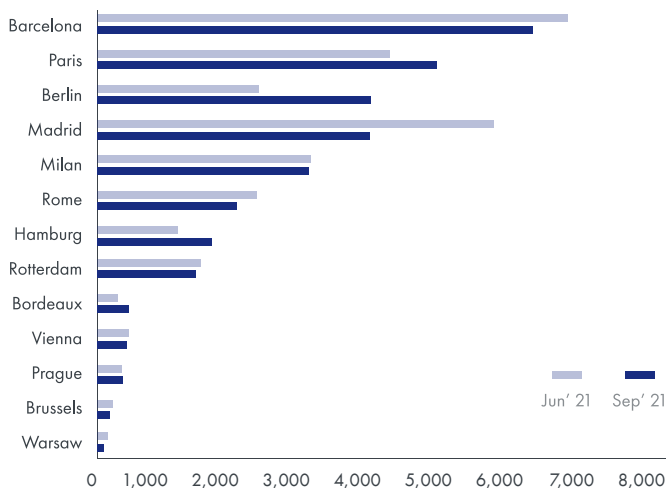
SHARED MOPEDS PER 10,000 INH.
Approx. September 2021

Barcelona
Paris
Berlin
Madrid
Milan
Rome
Hamburg
Rotterdam
Bordeaux
Vienna
Prague
Brussels
Warsaw

0   5   10   15   20   25   30   35   40

EVOLUTION OF RIDERSHIP
Base 100 / June 2020

150

100

50

0

July Aug. Sept. Oct. Nov. Dec. Jan. Feb. March April May June July Aug. Sept.

2020   2021

— Average (all modes)   — Moped
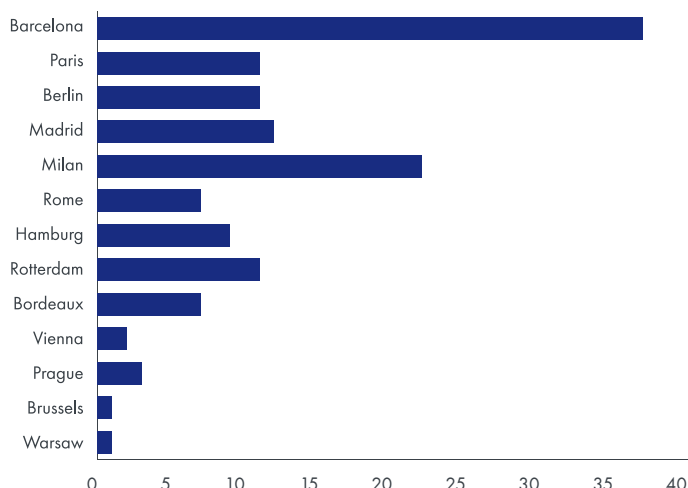
HOTSPOT
Most shared mopeds per 100m² (30 Sep)

BARCELONA
EIXAMPLE

N° of services available

Map markers: 7, 8, 10, 7, 6, 11, 4, 7, 5, 10, 6, 5, 6, 10, 5, 4
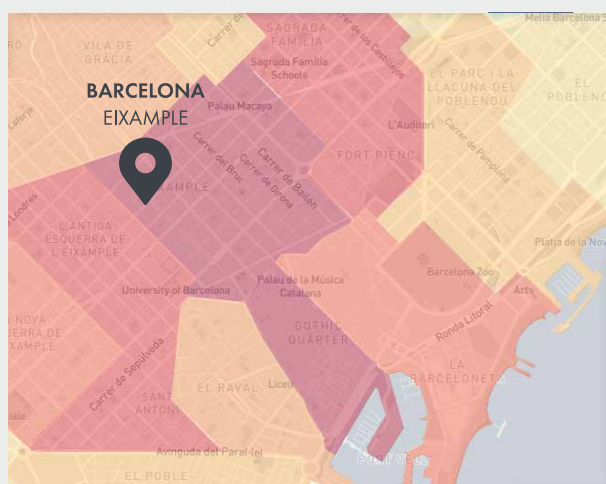
GROWTH IN TOTAL CARS
June 2021 vs September 2021

Cities (top to bottom):
Paris
Berlin
Hamburg
Madrid
Milan
Oslo
London
Rome
Prague
Warsaw
Brussels
Stockholm
Vienna
Barcelona
Bordeaux
Rotterdam

Legend: Jun' 21 / Sep' 21

X-axis: 0, 1,000, 2,000, 3,000, 4,000, 5,000, 6,000, 7,000, 8,000
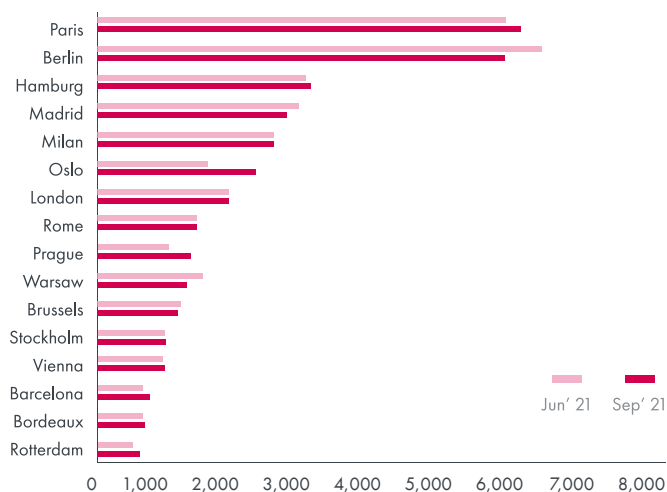
SHARED CARS PER 10,000 INH.
Approx. September 2021

Cities (top to bottom):
Paris
Berlin
Hamburg
Madrid
Milan
Oslo
London
Rome
Prague
Warsaw
Brussels
Stockholm
Vienna
Barcelona
Bordeaux
Rotterdam

X-axis: 0, 5, 10, 15, 20, 25, 30, 35

EVOLUTION OF RIDERSHIP
Base 100 / June 2020

Y-axis: 0, 25, 50, 75, 100, 125

X-axis: July, Aug., Sept., Oct., Nov., Dec., Jan., Feb., March, April, May, June, July, Aug., Sept.

2020 | 2021

Legend: Average (all modes) — Cars
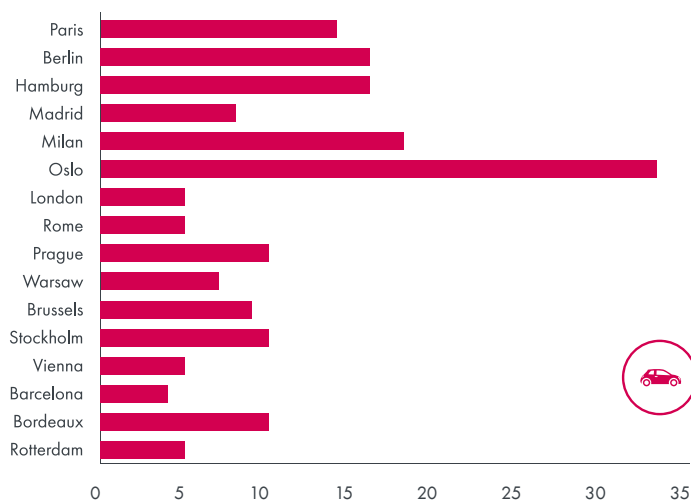
HOTSPOT
Most shared cars per 100m^2 (30 Sep)

MADRID
BERNABÉU STADIUM
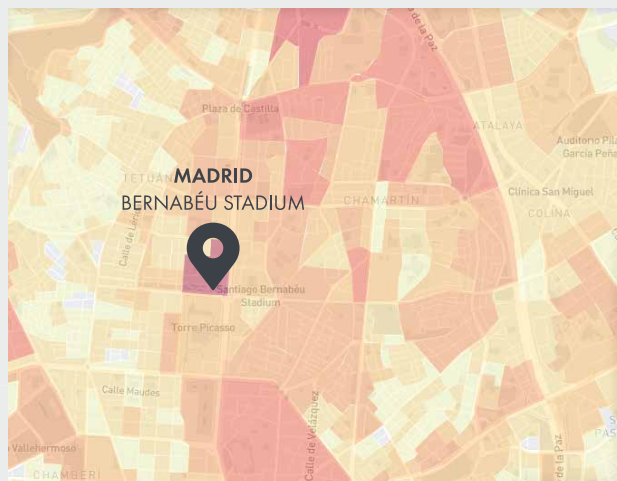
As the inventor of automated vehicle sharing, we at INVERS enable shared mobility service providers to launch, operate and scale their offerings with integrated hardware and software solutions specifically designed for developers. As the world's first shared mobility technology company, we develop and reliably maintain the fundamental building blocks to offer our customers cost-efficient and easily implementable tech solutions at scale.

INVERS acts as an independent and reliable partner to all sharing providers, no matter what vehicle form factor or business model, to make the use of shared vehicles more convenient and affordable than ownership. Customers include SHARE NOW, Clevershuttle, Miles, Getaround, Flinkster, TIER, GoMore, imove and Emmy. The company was founded in 1993 and has locations in Siegen, Cologne and Vancouver. The development takes place entirely in Germany.

Demand for sustainability fuels shared mobility again.
While mobility operators worldwide were affected by lockdowns and changing transportation behavior in 2020 and early 2021, we now see that the demand for shared mobility is increasing again. This is also fueled by a growing awareness for sustainability and the topic of climate change has finally reappeared on people's agenda.

Trends include subscription, new form factors and multimodal fleets.
One current topic within the industry globally is the growing interest in subscription models, which provide a convenient alternative to car ownership. While being a combination of traditional rental and leasing, the concept of subscription is far more flexible and can be fully digital. It recently took off with increased customer demand, invested capital, and a general trend towards on-demand and subscription products and services in other industries as well.

To close the gap between cars and micromobility there is also a growing number of microcars available on the market, and it's just a matter of time before we see them in more shared mobility services. Unlike their full-sized counterparts, microcars typically weigh under 500 kg and have two seats. The lighter footprint has a positive effect on energy consumption, making the vehicles more affordable as they need smaller batteries. Also they have advantages with regards to safety as they don't drive at high speeds. So with microcars, there is another interesting option to the sustainable mobility mix with the comfort of a regular car.

Overall, the market for shared mobility is very dynamic, challenging operators to quickly adapt their business models. This level of agility, however, relies on a flexible tech stack, powerful shared mobility technology and vehicle agnostic connectivity solutions. We are looking forward to joining the movement with our expertise in shared mobility technology.

Alex Gmelin
Chief Product Officer

FEATURE CITY | LONDON

👤 Pop: 3,557,360
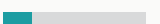
For one of Europe's largest cities, shared mobility in London remains remarkably underdeveloped. Moped-sharing is banned, the fabled 'Boris Bikes' have plateaued in both range and ridership while other bikeshare services have struggled to survive. London's much-anticipated scooter trial is a case study of the difficulties operators face. With 33 boroughs, local governments and by-laws, London is less a cohesive city and more a hodgepodge of regulations. When the three successful bidders launched their London fleets in June, scooter riders were presented with a confusing map of permitted zones, prohibited zones and "ride-through" boroughs (zones that were half-participating in the trial). Thankfully, the operational area has expanded progressively, with the borough of Hounslow reportedly set

to join soon. Few operational details have been made public though; Transport for London will allegedly redistribute licences based on differentiated operator performance, with little indication of how this will work in practice.

Together with compulsory parking requirements, complicated geofencing technology and vehicle re-distribution rules, much about London's scooter trial appears designed to fail. Car sharing offers a bright spot in the city's shared mobility landscape, however. A diverse selection of car clubs, peer-to-peer sharing platforms and dedicated shared fleets currently serve the British capital with around 190,000 active users, according to CoMoUK.[2]

In partnership with:
Oliver O'Brien

SERVICES	OPERATORS	TOTAL NUMBER OF VEHICLES	VEHICLES PER 10,000 INHABITANTS[1]
Bikes (sb)		8,000	23
Bikes (ff)		1,600	4
Scooters		3,000	8
Cars		3,000	7
TOTAL	14	15,600	

FLEET DISTRIBUTION

As at September 2021

London: 57%, 13%, 20%, 11%, (remaining segment)

Average 16 Cities: 22%, 6%, 49%, 10%, 12%

LONDON SCOOTER TRIAL

Operations Zone

- Hammersmith & Fulham
- Westminster
- City of London
- Camden
- Ealing
- Tower Hamlets
- Southwark
- Richmond Upon Thames
- Lambeth (north only)
- Kensington & Chelsea

«Ride-Through» Boroughs no scooter parking allowed
5 June 2021
5 July 2021
2 August 2021
27 September 2021
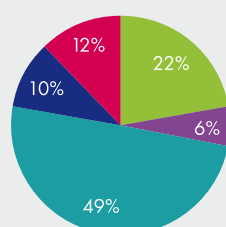
HIGHLIGHTS

JUN '21
London Mayor flags expansion of **Santander Cycles** system.

Tender for inaugural shared-scooter trial awarded to **Dott**, **Lime** and **TIER**.

JUL '21
The City of London and northern Lambeth join scooter trial; Southwark becomes a "ride-through" borough.

SEP'21
HumanForest relaunches with an initial fleet of 400 e-bikes one month after raising €2.7M.

Beryl launches 8 vehicles as part of UK's first cargobike-sharing system in Hackney.

Santander Cycles breaks a new monthly record with 1.2 million trips.
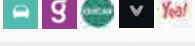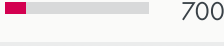
FEATURE CITY | BORDEAUX

Pop: 640,823

Despite being one of the smallest markets monitored in the Index, Bordeaux has consistently topped the list for both per capita shared vehicles and the diversity of shared mobility services on offer. This is largely due to Bordeaux's regulatory policies which limit not the number of operators but the fleet size of each operator, without capping the total number of shared vehicles at the city level.

The result has been an intensely competitive market where operators simply cannot grow, squeezing their margins and leaving users with a fragmented supply of shared vehicles to choose from. All that may be about to change, however.

In September, Bordeaux's mayor suggested limiting the number of free-floating shared vehicles and a change to Bordeaux's laissez-faire approach to parking. Metropolitan authorities are already drawing up plans for the kind of competitive tender process introduced in other European centres, with a potential start date in Spring 2022.

One working hypothesis is that only two tenderers will be selected for free-floating bikes, scooters and mopeds (car-sharing is not impacted). However, with new operators still entering Bordeaux's already crowded market, the competition for any future tender will be fierce.

SERVICES	OPERATORS	TOTAL NUMBER OF VEHICLES	VEHICLES PER 10,000 INHABITANTS[1]	REGULATORY FLEET CAP
Bikes (sb)		1,700	26	-
Bikes (ff)		600	10	600 per operator
Scooters		900	14	100 per operator
Mopeds		500	7	200 per operator
Cars		700	10	120 per operator
TOTAL	24	4,400		

FLEET DISTRIBUTION
As at September 2021

Bordeaux
39%, 15%, 21%, 10%, 16%

Average 16 Cities
22%, 6%, 49%, 10%, 12%

EVOLUTION OF RIDERSHIP
Q3 2020 to Q3 2021 I Base 100, July 2020

Lockdown 30 Oct/mid-Dec

July 2020 — Aug. — Sept. — Oct. — Nov. — Dec. — Jan. 2021 — Feb. — March — April — May — June — July — Aug. — Sep.
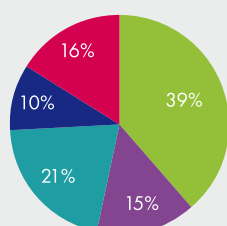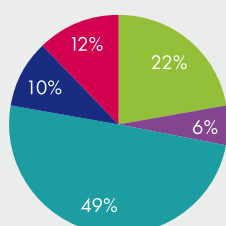
HIGHLIGHTS

AUG '20
Bluecub carsharing service closes.

SEP '20
Dott launches with 100 scooters, the 7th such operator.

OCT '20
Bolt simultaneously launches 100 scooters & 140 ebikes.

FEB '21
After leaving Bordeaux in 2018, **Lime** returns with 100 scooters & 600 ebikes.

SEP' 21
Cityscoot's launch disrupts **YEGO**'s monopoly of Bordeaux's moped-sharing market.

OCT' 21
LINK becomes 11th scooter operator, with 100 vehicles.

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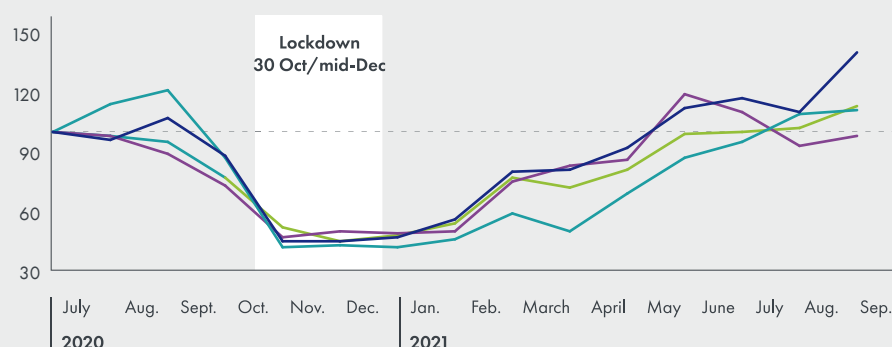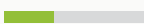
BARCELONA

Pop: 1,636,762

If Barcelona is a European leader in shared mobility, it is certainly not thanks to city regulations. For years, operators have been mired in legal and regulatory changes with little certainty on the horizon. It has made Barcelona a boom-and-bust town for shared mobility. There were thousands of shared scooters roaming the Catalan capital in 2019; now there are none. Strict parking rules that disadvantage free-floating carsharing have encouraged many operators to decamp to Madrid. And of the 21 operators who originally applied for the city's moped-sharing licences, only 9 are operational today. The permit allocations were so restrictive that operators were unable to scale to a profitable service. When City Hall offered 3,000 extra permits, it was taken to court for running an uncompetitive tender process. That legal challenge was recently dismissed but the future of Barcelona's moped permits was still unclear at the time of printing. Moped operators therefore remain in limbo, not knowing whether to anticipate new capacity or to double-down on existing regulations. Barcelona's Ayuntamiento is therefore treading carefully on a long-awaited regime for scooter-sharing. A regulatory proposal was again delayed in September, but the Ayuntamiento is rumoured to favour a fleet-wide cap of 5,000 shared scooters, distributed among 4-5 operators. Recent political reshuffling at City Hall has also shifted responsibility for the mobility portfolio with a new responsible councillor taking over in mid-September - yet more uncertainty for Barcelona's micromobility sector.

SERVICES	OPERATORS	TOTAL NUMBER OF VEHICLES	VEHICLES PER 10,000 INHABITANTS[1]	REGULATORY FLEET CAP
Bikes (sb)		5,200	32	-
Bikes (ff)		1,200	7	4,000
Mopeds		6,100	37	10,000*
Cars		700	4	-
TOTAL	20	13,200		

*Increase subject to legal challenge

FLEET DISTRIBUTION
As at September 2021
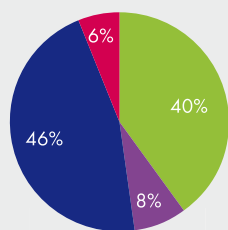
Barcelona
46% · 40% · 8% · 6%
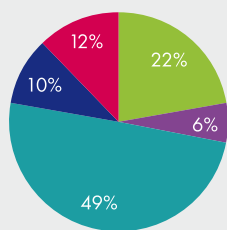
Average 16 Cities
49% · 22% · 12% · 10% · 6%

EVOLUTION OF RIDERSHIP
Q3 2020 to Q3 2021 | Base 100, July 2020

July Aug. Sept. Oct. Nov. Dec. | Jan. Feb. March April May June July Aug. Sep.
2020 | 2021
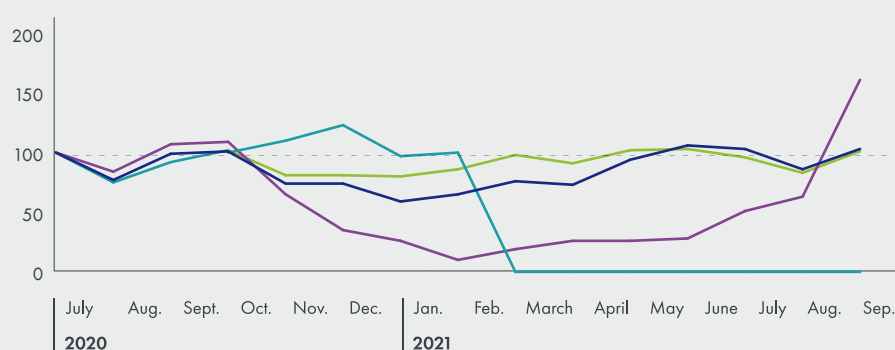
HIGHLIGHTS
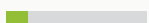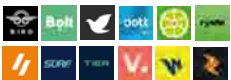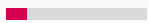
JUN '20
12 moped operators share in City's 7,000 original permits.

AUG '20
Bird closes **Scoot**, its moped- and bike-sharing service.

FEB '21
Allocation of 3,000 extra moped licences successfully appealed in court.

MAR '21
Uno becomes final scooter operator to quit Barcelona.

SEP'21
Cooltra relaunches its bikesharing service with 100 e-bikes.

Spanish Parliament begins drafting national laws mandating helmet use on scooters.

 Pop: 666,759

For many months, Oslo's shared mobility was making headlines for all the wrong reasons. fluctuo's last Index showed around 300 electric scooters per Oslo inhabitant, almost 5 times higher than in Berlin. With rising complaints, hospitalisations and footpath clutter, new regulations from Oslo's town hall were inevitable. On 10 September, a city-wide cap of 8,000 scooters was imposed and almost overnight Oslo dropped from the second largest scooter fleet to 7th place. The limit for individual operators - many of whom previously offered over 5,000 vehicles each - has been slashed to just 667, prompting three operators to unsuccessfully challenge the new permit system in court. The end result is that Oslo now hosts a record 12 scooter operators and no free-floating bikes. Concerned that the regulations will harm profitability, some operators have already teamed up to pool their limited fleets. For example, Bydue and ShareBike both use Ryde's app and vehicles, despite holding separate licences. Nevertheless, there are growing calls for the city to adopt a competitive tender process in the new year. Oslo's approach to carsharing is less controversial. Since 2019, Oslo Kommune has been trialling 600 on-street parking spots as part of a broader pilot program for shared and traditional rental cars. Operators can apply for a permit by paying an annual registration fee (which is halved for electric vehicles), although the scheme currently prohibits 'free-floating' business models. Combined with the popularity of peer-to-peer services, Oslo now has the highest number of shared cars per capita than any other city in the Index.

SERVICES	OPERATORS	TOTAL NUMBER OF VEHICLES	VEHICLES PER 10,000 INHABITANTS[1]	REGULATORY FLEET CAP
Bikes (all)		2,300	34	-
Scooters		9,000*	134	8,000
Cars		2,200	33	-
TOTAL	20	13,500		

*September average (i.e. pre- and post-regulatory changes)

FLEET DISTRIBUTION
As at September 2021
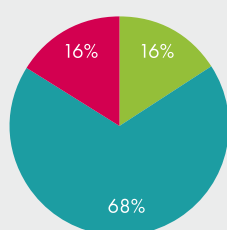
Oslo
- 16%
- 16%
- 68%
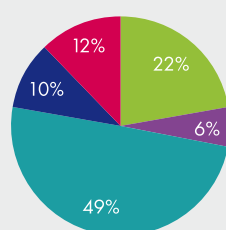
Average 16 Cities
- 22%
- 12%
- 10%
- 49%
- 6%

EVOLUTION OF RIDERSHIP
Q3 2020 to Q3 2021 | Base 100, July 2020

New regulations 10 Sep.

— AVG Scooter (Europe)   — Scooter Oslo
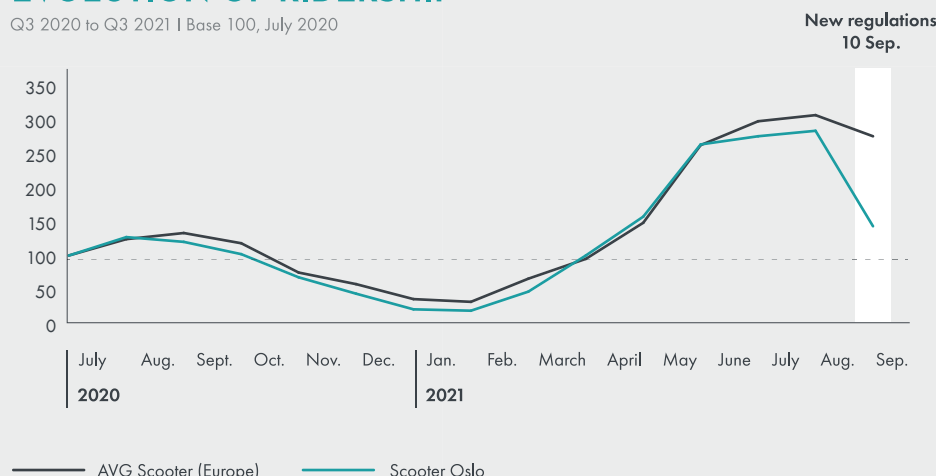
HIGHLIGHTS

MAY '21
Vy ends joint-venture with **Green Mobility**; the latter plans to relaunch in 2021.

JUN '21
Oslo's shared scooter fleet reaches almost 20,000 vehicles.

JUL '21
Zeus launches with 300 e-scooters.

AUG '21
Voi, **Ryde** and **TIER** unsuccessfully sue Oslo Kommune for proposed new scooter regulations.

SEP'21
Dott launches in Oslo as one of 12 successful scooter licensees.

New scooter permits enter into force with a cap of 667 vehicles per operator.

Bird integrates **Oslo City Bike** into its scooter-sharing app.

METHODOLOGY

The European Shared Mobility Index provides a quarterly snapshot of the shared mobility market across 16 European cities, selected to highlight diversity in size, geography and market characteristics.

The Index's scope encompasses shared bikes (both free-floating and docked systems), scooters, mopeds and shared cars for drivers (free-floating, station-based and peer-to-peer). Neither ridesharing services (e.g. Uber, Bolt), carpooling (e.g. BlaBlaCar) nor long-term rentals (e.g. Swapfiets) are included. Unless otherwise indicated, all maps, tables and graphics are point-in-time analyses based on available data as at 30 September 2021.

Vehicle and trip data were sourced directly from operators, via open data sources, from mobile applications and public announcements. Industry averages and some data extrapolation were used to fill remaining data gaps.

Operators who contributed financially to this report have not received any special treatment. All graphics and tables appearing in this report are the exclusive property of fluctuo. Their use is authorized subject to the notice of copyright.

(1) Population data were taken from Eurostat city estimations, corrected for shared mobility operational zones (where required).
(2) Statistics sourced from CoMoUK, Car Club Annual Report: London 2020.

WHO WE ARE

fluctuo
Mobility intelligence

fluctuo is Europe's leading aggregator of data on shared mobility services (bikes, scooters, mopeds, cars). We combine innovative data collection methods, sophisticated algorithms, and a team of mobility experts to produce the most exhaustive accurate data possible.

We help our clients to monitor and understand market trends and to improve the performance of their services, by providing daily data on more than 200 shared mobility providers in 100 European cities. We have developed an API that displays real-time information on shared vehicles and enables users to book them through third party apps and websites (e.g. from cities, public transport companies and tourism operators).

The **European Shared Mobility Index** is just one of the analytical reports fluctuo publishes. We are always looking to partner with operators, transport companies and city authorities to develop new business intelligence products that leverage our comprehensive data analytics. To find out more, please don't hesitate to contact us.

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Business & partnerships: Julien Chamussy | julien@fluctuo.com

Cityscoot

Cityscoot is leading the European moped sharing market. Today more than 7000 electric mopeds can be booked in one click right from the Cityscoot app in Paris, Nice, Bordeaux, Milan and Barcelona. The company was founded in 2014 and is a member of the Next40 (exclusive selection of the French scaleups with the most potential). It has already recorded more than 15 million trips and has nearly 400 employees.

www.cityscoot.eu

datamobile AG

datamobile AG is the ideal companion on the way to the digital future in shared-mobility services. With a modular, scalable offering, powerful network infrastructure and data analysis, all services are available for digitization. Our core competence is connectivity service for data and SMS with highest safety standards and highest network coverage around the globe.

www.datamobile.ag

dott

We're a micromobility operator with over 30,000 active e-scooters across 6 countries, in 16 European cities and counting. The Dott way is built upon three pillars: in-house & local operations, long-term sustainability, and accessible rides for all. Our next venture, the Dott e-bike, is currently being manufactured in Europe and is set to launch in 2021. Small ride. Big change.

www.ridedott.com

INVERS

INVERS, inventor of automated vehicle sharing, enables mobility service providers to launch, operate and scale their offerings with integrated telematics and software solutions, specifically designed for developers of shared mobility services. The company acts as an independent and reliable partner for operators such as SHARE NOW, Clevershuttle, Miles, Getaround, Flinkster, Tier, and Emmy. The development takes place entirely in Germany.

www.invers.com

Lime

Lime's mission is to foster people-first cities by empowering residents with shared, affordable and carbon-free transportation options. As the global leader in micro-mobility, Lime partners with cities to deploy electric bikes, scooters and additional shared modes. Named a Time100 Most Influential Company, Lime has powered more than 250 million rides in more than 200 cities across five continents, spurring a new generation of clean alternatives to car ownership. Learn more at li.me.

www.li.me

POLIS

CITIES AND REGIONS FOR TRANSPORT INNOVATION

POLIS is the leading network of European local, regional and transport authorities committed to transport innovation. Our focus is on innovations that make urban mobility more sustainable, safe, affordable and equitable. We actively support constructive dialogue with shared mobility operators to shape together solutions that serve the public good and drive the shift that we all need to achieve this decade.

www.polisnetwork.eu

SHARE NOW

SHARE NOW is the market leader and pioneer of free-floating carsharing. The company is operating 11,000 vehicles in 16 European cities. More than three million customers are already using the on-demand service that offers rentals from 3 minutes to 30 days and a variety of car models from brands such as BMW, Mercedes-Benz, MINI, smart and Fiat.

www.share-now.com

surve mobility

Surve Mobility, formerly known as Chargery, is Europe's N°. 1 for intelligent shared mobility operations. Through an integration of full-service, intelligent software and smart infrastructure solutions, we provide highly efficient and sustainable mobility operations to set new mobility in motion.

www.survemobility.com

VAIMOO

VAIMOO empowers transportation leaders to achieve a sustainable, efficient and comfortable mobility experience. The official e-bike sharing system in Copenhagen and Rotterdam, VAIMOO has recently been adopted by Voi Technology to extend its e-scooter sharing service in the UK. Deployable both in docked and free-floating schemes, VAIMOO includes e-bikes, racks and a management platform that integrates with third-party transport for multimodal user journeys.

www.vaimoo.com