

ZCI Masterclass: the Business Case of Sharing Mobility - Focus on E-Scooter sharing.

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- Director Public Policy at TIER MOBILITY;
- 2017-2018 expansion manager at OFO, chinese unicorn launching bike sharing ff globally;
- 2018-2020 Public Policy Manager for Scooters legislations in Italy and EMEA launcher;
- Since 2020 Director Italy for sharing micro mobility companies;



Introduction

TIER Mobility

- Among the largest operators in sharing micro mobility globally, with over 250,000 vehicles;
- 2021 TIER acquires Wind Mobility & Nextbike;
- Active Europe and Middle East.



100% climate neutral

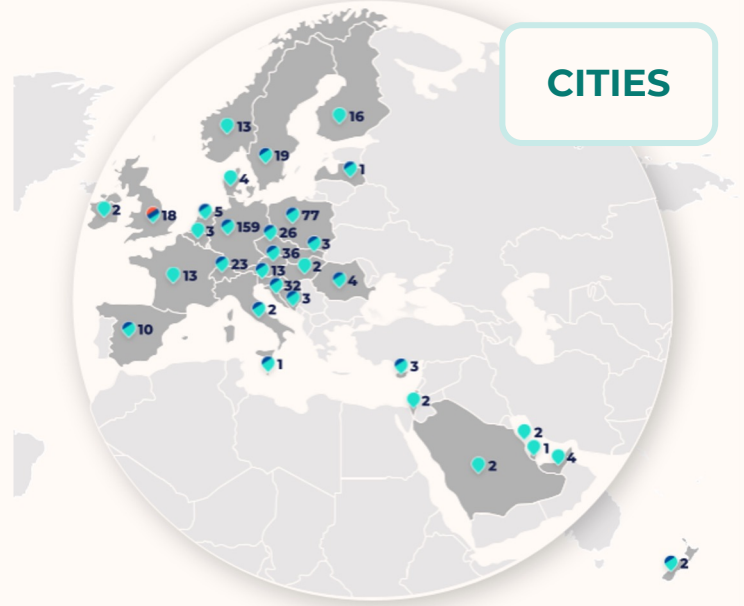


5+ years asset lifespan



44% TIER users using intermodality

TIER



100m+

Rides in 2023

50+

Mobility-as-a-Service partnerships

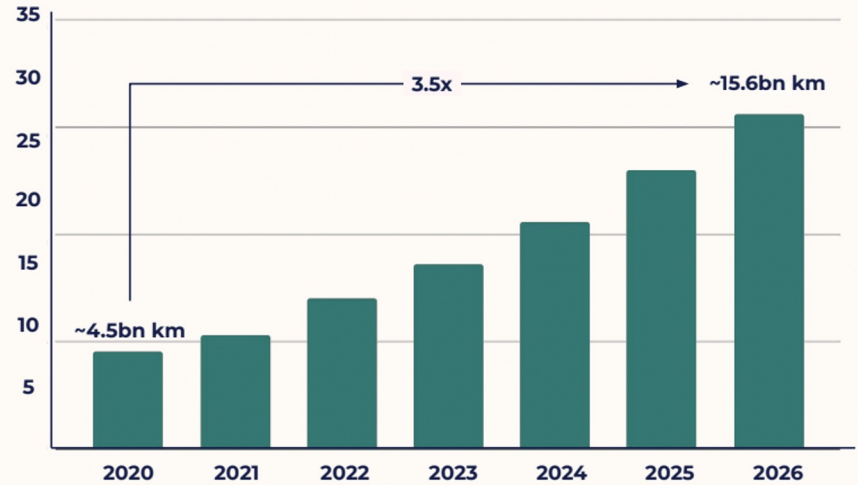
Agenda

- Industry context and service logics;
- authorization schemes: funded / unfunded
- policy Impact on business model;
- pnl breakdown

Industry growth & challenges

- Micro-mobility passengers miles expected to **increase 3.5x by 2026** (McKinsey)
- McKinsey survey found that 61% of respondents want to **substantially increase their use of green** micro-mobility
- Urbanisation continues, with **city populations to increase 50%** by 2045
- Cities are making **concrete commitments to reduce carbon emissions**, introducing plans to reduce car usage, and investing more in micro-mobility infrastructure.

Shared micro-mobility passenger miles traveled (PMT), 2020-26 in km bn



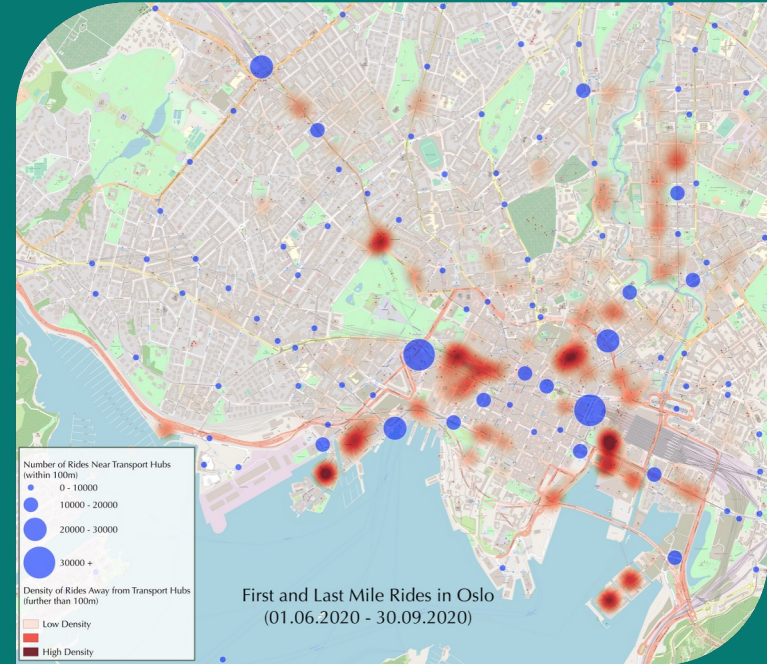
- Fueled by current market pressures, it is **essential to run responsible and economically sustainable operations**
- Closer cooperation between operators and cities is required to **create the right conditions to successfully integrate shared micro-mobility** within cities

How micro-mobility can help cities

Shared micro mobility is a new transport system. Benefits for communities include:

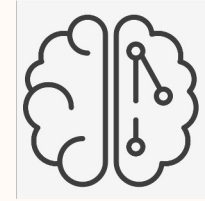
- help cities reducing dependence on cars by offering citizens a wide choice thanks to **Intermodality**;
- **Integrate PT** supporting low coverage areas and low frequency time of the day, guaranteeing last mile;
- create constant **data flows** on micromobility;
- **customer-centric** mobility service for citizens (tailored timetables and pick-up/drop-off)

Integration with public transport and promotion of intermodality



We have optimized our service in Oslo based on hubs with the highest levels of intermodality between electric scooters and public transport

Shared mobility in nutshell



IoT based tech:
opening/closing rides with smartphone, parking restriction in dedicated areas, control over position, maintenance status

Georeferencing:
possibility of limiting service areas, parking areas and maximum speeds via GPS

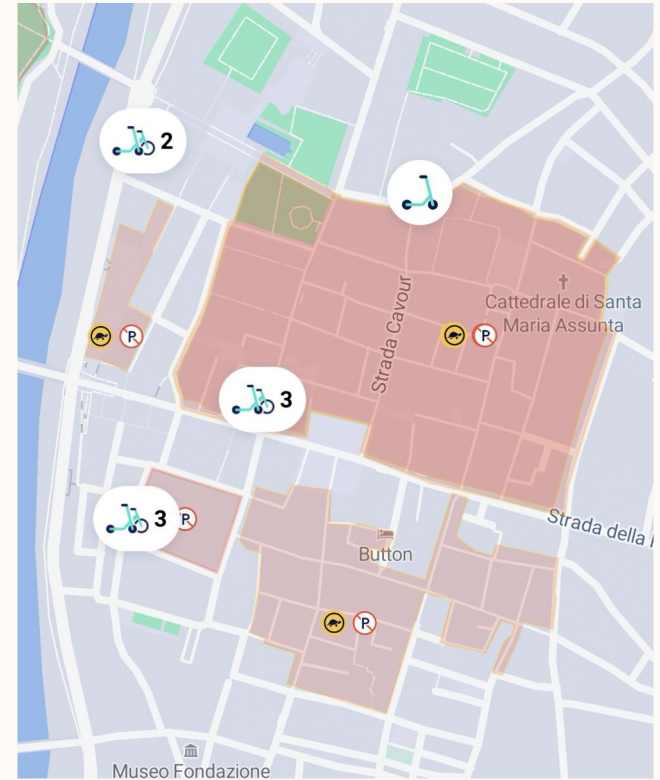
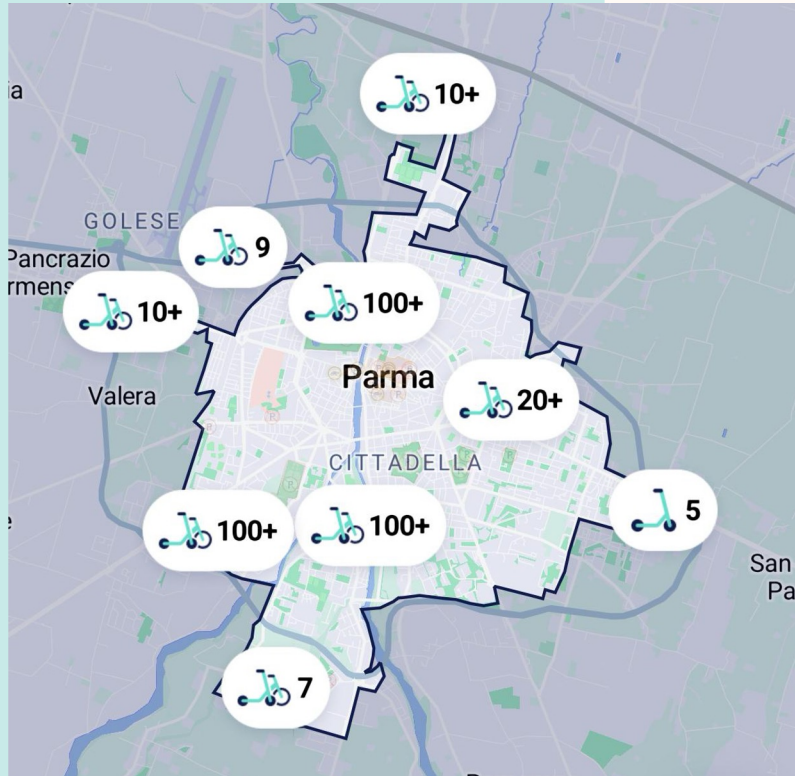
Education:
Continuous digital education in the App for users on road rules and safety regulations

Ops 24/7: Ops Teams dedicated to continuous maintenance and emergency response activities

Predictive algorithms:
operational management and service analysis software

Prevention:
active user insurance on each vehicle

PARMA Business Area



Authorization schemes

Funded

- financed by the PA
- usually station based systems of ebikes (rarely scooters);
- Fully falling under Procurement Code
- Not foresee competition

Un-funded

- privately financed
- usually ff systems of e bikes and e scooters
- public notices
- foresee competition

Impacts:

- More control by cities;
- Financial stability for companies;
- Less users friendly;
- Low margins;

- less control by cities;
- more financial risk for companies;;
- Users tailored ;
- higher margins;

Policy impact on un-funded BM

Policies that positively affect BM:

- Limit to operators to 1 or 2;
- min 700 vehicles per OP in order to guarantee profitable environment;
- No rev sharing or high city fees;
- selections not based on upward or downward auctions on prices or technical supplies;
- balance between users constraints and UX

Policies that negatively affect BM:

- Number of operators not proportionate to market volumes;
- Fleet size below min profit threshold;
- Policy restrictions careless UX;
- Parking limitations + low density of PP;
- fines to companies instead of users who violate traffic regulations

PnL Figures Breakdown

Revenues metrics to consider:

Revenues volumes are given by:

- # Active Vehicle
- # Total Minutes
- Price value

KPI used to evaluate a market:

- Rides per Day;
- Rev per Ride;
- Avg Monthly Riders
- New Riders

Figures on which municipal regulations directly impact the PnL

Costs metrics to consider:

Figures direct impacting revenues:

- Discounts
- Subscriptions
- Free-minutes
- Refunds

Costs:

- Street operations labour;
- Repair Labour
- Spare Parts;

- Failed Payments
- Payment Processing Costs
- Insurance
- Fines (by cities , by police)
- City fees

- Warehouse Costs
- Management
- Technology (ID check, parking tech, gps)

- Depreciation (Operating Assets)

Change Mobility for Good.

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