SHARED MICROMOBILITY GOVERNANCE

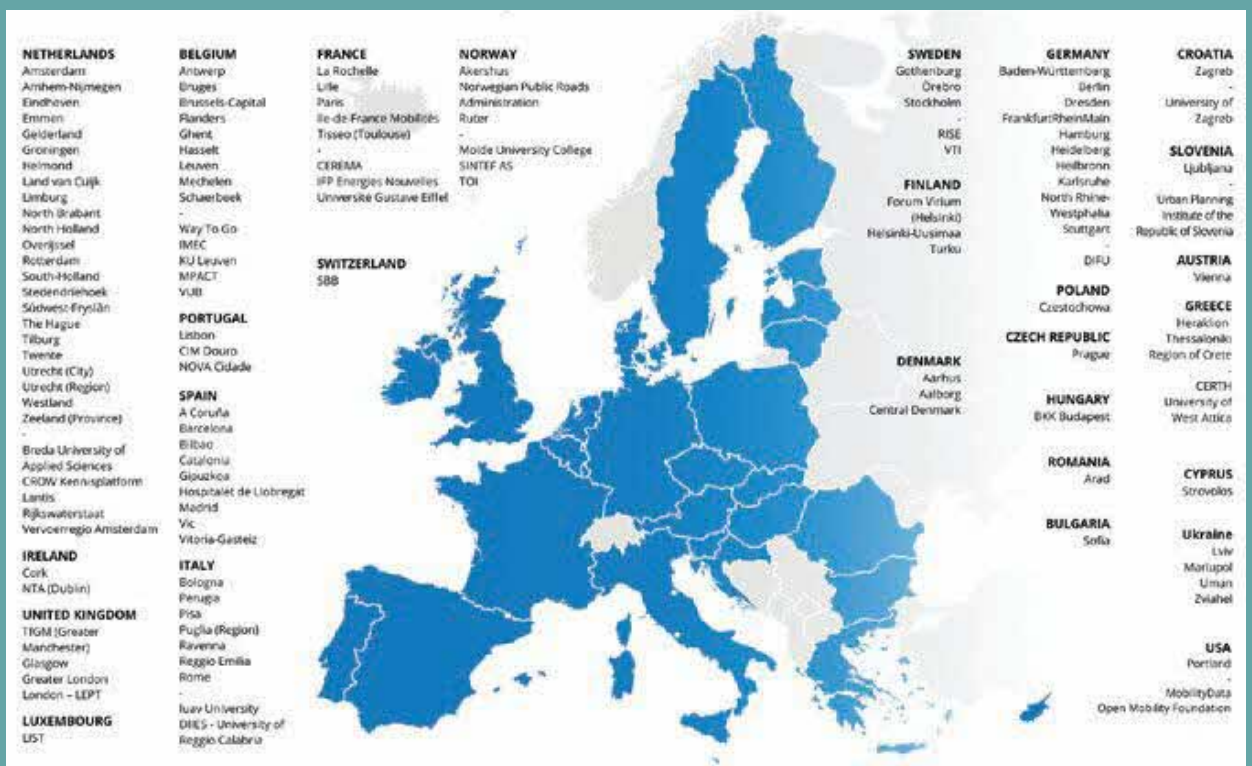


PEDRO HOMEM DE GOUVEIA
Pedro Homem de Gouveia is Senior Policy Advisor at POLIS, leading its Governance & Integration and Safety & Security clusters. He has extensive experience in public space, pedestrian accessibility, street safety and public participation, including over 20 years working at the local level.



FANNY BOCCIOLI
Fanny Boccioli, Project Manager at POLIS, works across a range of topics including air quality, leisure mobility, and new and shared mobility services. She supports the Governance & Integration Working Group and has contributed to POLIS publications on shared micromobility.

How European Cities are Learning to Govern Shared Micromobility



Overview of POLIS members, September 2026.
Image: POLIS

In 2018, European cities witnessed the arrival of shared micromobility. In a matter of weeks, pavements were filled with a new type of vehicle whose success nobody had really anticipated. Faced with this phenomenon, many cities found themselves forced to act quickly. Their approaches ranged from prohibition to wholehearted adoption, and from open-door markets to highly competitive tenders. What has been learned so far?

For local and regional authorities, shared micromobility poses a governance challenge with many moving parts: it's about sustainability, but also about safety; about innovation, but also disruption; about the enforcement of rules, but also negotiation; about decisions, but also effective follow-through.

Eight years on, a consistent approach is increasingly emerging: cities are using regulations and licensing frameworks not only to manage shared micromobility, but also to make it work better for everyone—as part of a richer 'mobility menu'.

POLIS is a network of more than 120 European local and regional governments, transport authorities and research organisations, working to advance more sustainable, safe and equitable mobility through innovative policies, strategies, methods and tools.

The opportunities and challenges faced by local and regional authorities in this domain have been a major focus of the POLIS Governance and Integration Working Group.

Discussions within this working group—which facilitates systematic exchanges between POLIS members, operators and other relevant stakeholders—have provided several useful insights and prompted a more in-depth analysis through a series of working documents: "Macromanaging Micromobility: Taking the long view on short trips" (2019)[1], "Sharing Data for Shared Micromobility" (2021)[2], "Catch me if you can! How European Cities are regulating Shared Micromobility" (2023)[3] and "Careful what you wish for… Practical implications of rules & requirements for shared micromobility" (2025)[4].

The Long and Winding Road: Shared Micromobility Regulation Meets the Real World

It is easier to say what 'should' be regulated than to regulate properly. Additionally, rules that may seem 'obvious' can have unexpected—and undesirable—implications.

Take speed limits, for example. Hardly any rule sounds more intuitive: reducing the speed of scooters will make collisions less likely and their impacts less severe. However, putting this into practice is rarely straightforward. Geofencing, the technology used to enforce speed limits in specific zones, relies on the accuracy of GPS—which can vary by up to several metres in densely built-up urban areas. This can make vehicles decelerate abruptly in the wrong place, turning a safety measure into a source of confusion and, paradoxically, danger.

The issue of parking is also revealing. Incorrectly parked e-scooters and e-bikes have caused public frustration in many cities, and the push for regulation is understandable. The problem, however, is that there is no clear and universally accepted definition of what 'proper parking' actually means for shared micromobility vehicles. Furthermore, enforcing a regulation that mandates proper parking, when no appropriate infrastructure exists, imposes an unachievable standard on operators and users.

The situation is similar with regard to compulsory helmet use. While the requirement for operators to provide helmets sounds reasonable, storing helmets on the vehicles poses immediate technical and hygiene challenges—ranging from ensuring that helmets are available in the proper size, well cleaned and maintained, to them not getting stolen. These, in turn, can carry serious costs for the operators.



Shared bike users in Paris demonstrate how safe, dedicated cycling infrastructure can support shared micromobility and encourage wider adoption.
Image: Karen Vancluysen



Antwerp's bike-sharing scheme provides residents and visitors with an alternative to private motorised transport.
Image: Shutterstock, courtesy of POLIS

> Any regulation that conflicts with the physical environment it is intended to regulate is bound to fail, however well-intentioned it may be.

Fixing a Hole: Important Built Environment Considerations When Designing Regulations

What many regulations have in common is a fundamental flaw: they view written regulation as enough, while underestimating the critical role of the built environment. When it comes to urban mobility, space is the most important regulator. The ways in which cities design roads and allocate road space strongly shape behaviour—including how fast vehicles circulate, and where and how well they park.

This realisation has far-reaching implications. A city that calls for responsible parking but fails to provide parking spaces is setting itself up for failure. If compliance is impossible or very difficult, enforcement will suffer the same fate.

A city that reduces the speeds of e-scooters, while leaving car speeds unchanged, widens the speed differential between road users on the same road. This raises the risk for scooter users and forces them onto the sidewalks—which, in turn, increases the risk for pedestrians.

In short, any regulation that conflicts with the physical environment it is intended to regulate is bound to fail, however well-intentioned it may be. The most effective cities are those that have understood this and acted accordingly.

Measures that have created conditions under which written rules actually work include low-emission zones, lower speed limits and traffic calming measures, cycle path expansions, and the re-allocation of car parking spaces to infrastructure for shared mobility.



Shared e-scooters in Madrid highlight the importance of regulating micromobility to ensure safe and equitable use of public space.
Image: Karen Vancluysen

A Day in the Life: Antwerp's Case for Adaptive Regulation

Antwerp provides a good case study of what results-oriented urban policy looks like in practice. When shared micromobility was introduced in 2018, the city opted not for a ban or a delay, but for active engagement based on a 'learning by doing' approach.

Since then, regulations have been revised multiple times, guided by data and experience. An internally-developed monitoring dashboard provided city officials with a real-time overview of where vehicles were located—whether they were parked correctly, and where rules were being breached. When GPS inaccuracies led to discrepancies between reported and actual vehicle locations, the city identified this as a priority issue for the next round of negotiations with the operators.

To ensure compliance with the regulations without relying solely on fines, which had encountered legal obstacles, Antwerp introduced a points system. Operators accumulated points for specific breaches of the regulations, which were reviewed every three months; penalties ranged from fleet reductions to licence withdrawals. Crucially, the system was introduced gradually, with an initial transition period for operators to familiarise themselves with the requirements before enforcement was tightened. Most operators welcomed this arrangement—it provided clarity, a level playing field and a framework for genuine accountability.

Longer licence terms, typically five years, have been advocated as a means of encouraging investment in better vehicles, more stable local jobs, and more comprehensive data-sharing agreements.

Can't Buy Me Licences: How Cities are Shaping Shared Micromobility Markets

Early on, several cities adopted an 'open-door approach', where few or no conditions were imposed on market access. An operator could just start deploying. In some cases, this approach was adopted deliberately; in others, it was simply the result of the absence of an enabling law, a situation which was fixed slowly.

In larger cities, this open-door approach led to a 'tsunami' of vehicles, which harmed operators, users, and public spaces alike. These negative impacts left a deep mark in public perception, and shaped subsequent political debates.

Some level of order was needed, but how could it be pursued? Many opted for requiring a licence to operate, establishing a competitive process for the awarding of those licences, and a limited validity for them—which required a cyclic renewal of the competitive process.

The duration of the licence turned out to have important implications. Longer licence terms, typically five years, have been advocated as a means of encouraging investment in better vehicles, more stable local jobs, and more comprehensive data-sharing agreements. There is a simple logic behind this: if operators know they have a permanent presence in a city, they have an incentive to behave like long-term partners rather than short-term tenants of public space. However, longer contracts also require rigorous performance monitoring. Without this, there is a risk that established providers will be favoured over quality, and that cities will remain trapped in agreements that benefit operators more than the public.

Oslo's experience is worth noting here. Despite caps on fleet size—which one might have expected to restrict the market—the city achieved impressive passenger numbers. Scarcity, if well managed, can promote quality. A profitable and stable market attracts operators who are willing to invest; a race to the bottom drives out the better providers.

Paris provides a cautionary counter-example—the number of shared e-scooters fell from 15,000 in 2023 to zero by 2025, after a referendum decided to end shared e-scooter services. Other cities have since discussed, and some have adopted similar measures.

Whether this represented a democratic correction or a failure of regulation depends on one's point of view—yet it highlights the risk when the terms of the public debate are determined more by complaints than by facts. The attention that shared micromobility attracts in the media and in local politics is rarely proportionate to the extent of the risks it actually poses when compared to motorised transport. Salience bias[5] is a real phenomenon in regulatory decision-making, and its effects are not neutral.

Getting Better: How Proactive Regulation is Turning Shared Micromobility into an Asset

> Effective regulation is more difficult than it appears. It requires a clear purpose, takes longer than expected, and depends on framework conditions that go far beyond the written rules.

What sets the more effective regulatory approaches apart is not the specific rules they apply, but the mindset with which they tackle the challenge. The reactive 'damage-limitation' model treats shared micromobility as something that must be put up with. It focuses on containment, tackles symptoms rather than causes, and often leads to unintended consequences that require further reactive measures.

The proactive 'regulate to accelerate' model is based on a different premise. It asks what contribution shared micromobility can make to a broader agenda for sustainable mobility, and then drafts regulations to align private initiatives and capital with this public objective. It creates a stable regulatory framework, invests in infrastructure, aligns written regulations with the physical environment, and uses data and pilot projects to refine its approach over time.

Norway's National Action Plan for Micromobility—which covers e-scooters, e-bikes and new technologies such as small delivery robots—illustrates elements of this approach. It is revised every two to three years to keep pace with technological change and is guided by clear societal objectives. It recognises that effective regulation is a process rather than the result of a single decision. For example, new prohibition signs on the road surface and adjusted age limits have been introduced gradually and on the basis of scientific evidence, while national level guidelines help to reduce the fragmentation resulting from smaller local authorities lacking the resources or expertise to implement effective regulation.



Micromobility users navigate a busy street in Paris, illustrating the challenges of accommodating and regulating different modes of transport.
Image: Shutterstock, courtesy of POLIS

Come Together: Lessons Learned from Eight Years of Shared Micromobility Governance

The clearest lesson learnt from eight years of regulation of micromobility by European local governments is this: effective regulation is more difficult than it appears. It requires a clear purpose, takes longer than expected, and depends on framework conditions that go far beyond the written rules.

What is the regulation actually intended to achieve, and for whom? Does the infrastructure foster the desired behaviours? Is shared data being used for effective monitoring and decision-making? Are operators being treated as partners in a joint process, or as adversaries who need to be controlled? Finally, and most importantly: what should the mobility of tomorrow look like?

[1] POLIS Discussion Paper. November 2019. https://www.polisnetwork.eu/wp-content/uploads/2019/11/Polis-Paper-Macromanaging-MicroMobility.pdf

[2] POLIS Survey Report. January 2021. https://www.polisnetwork.eu/wp-content/uploads/2021/01/SHARING-DATA-FROM-SHARED-MICROMOBILITY_FINAL.pdf

[3] POLIS Research Report. November 2023. https://www.polisnetwork.eu/wp-content/uploads/2023/11/SHARED-MICROMOBILITY-REPORT.pdf

[4] POLIS Research Report. March 2025. https://www.polisnetwork.eu/wp-content/uploads/2025/03/Shared-Micromobility-Regulations-Report.pdf

[5] Salience bias is a cognitive bias that leads people to focus on (and often overestimate the importance of) the most prominent information or traits, because they are new or different. More common traits, i.e. those less
'salient', are underestimated. Shared micromobility presents an interesting example – being new and different, its 'salience' has drawn disproportionate attention to its road safety risks, while cars and trucks remain, by far, the largest cause of road deaths and serious injuries.