

# Bolt

## He who cannot be named

Bolt, David Mothander, Nordic Public Policy



# A refresher on Bolt

- Bolt is the leading mobility platform in Europe & Africa: No 1 in Africa and CEE and Top 2 in Western Europe
- Established in 2013 and headquartered in Tallinn, Estonia

42

Countries

#1

in 75% of markets

3<sup>rd</sup>

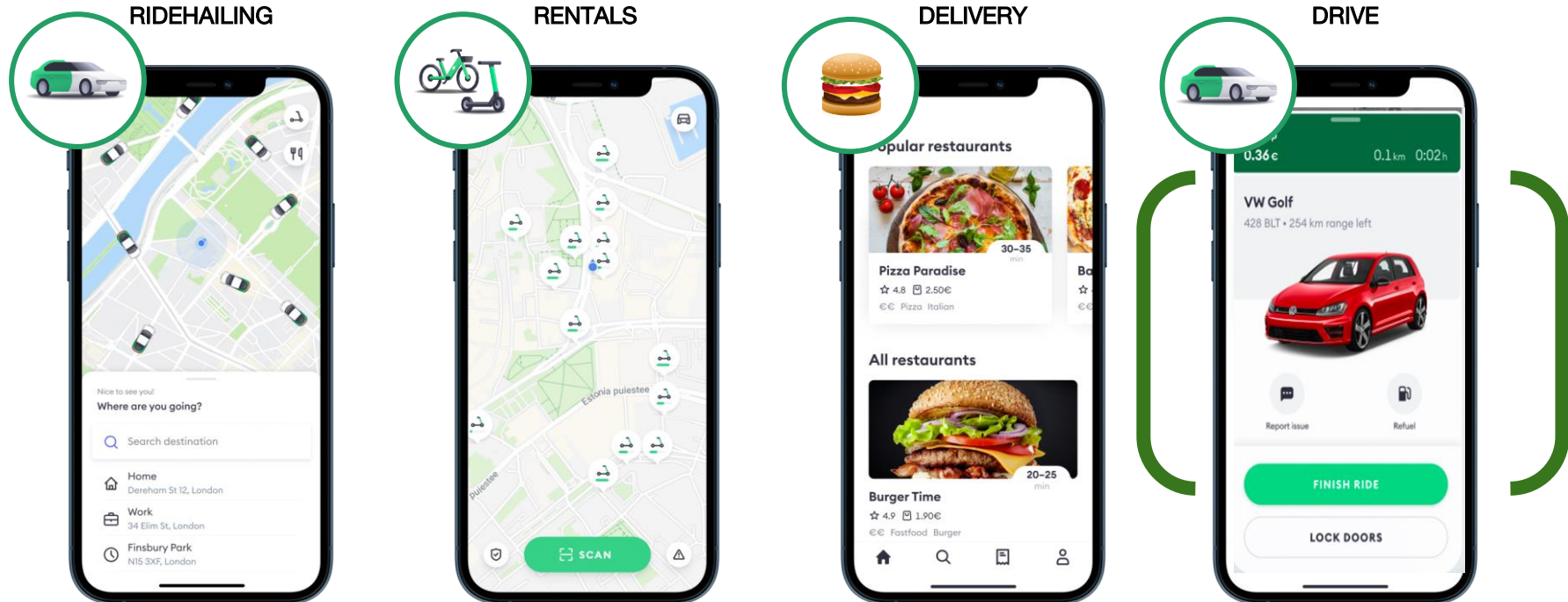
fastest growing  
company in Europe<sup>(1)</sup>



(1) According to a Financial Times FT1000 ranking (March 2020)

# A multimodal platform

- Business model leverages cost synergies, enabling cross-pollination between services
- The versatility of the Bolt mobile application lends itself to the dynamic needs of city dwellers



# What is the real challenge?

## The Voldemort of the eScooter world

1.



# What is the real challenge? Why so many?

2.





# Why do cities need e-Scooters?

## Trends of congestions, sustainability & mobility

3.



## Smart regulation

What are the primary goals?;

4.



People need to change behaviour.... but how do we get people to do this ?

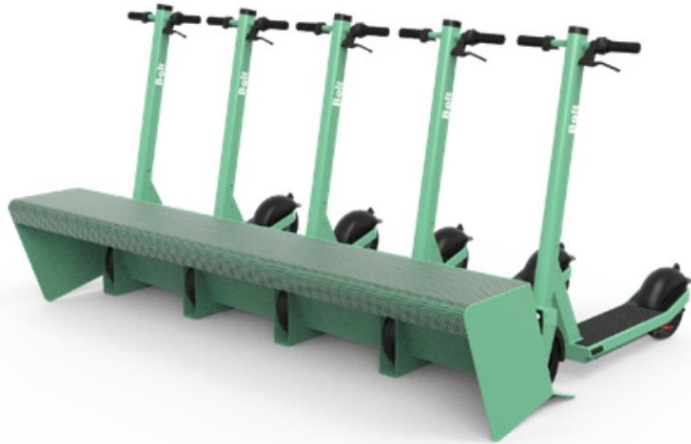


Affordability, variety of alternatives, multimodality & nudging



# Smart regulation

## Question 1; How many e-scooters are really needed?



1. Cap is needed due to the the inherent forces of the industry
2. What is a good ratio scooter/inhabitant for the cities? What is the ideal number of scooters for a city like Oslo 30K? 15K? Who can actually answer this question? Different cities, different ratios? Which variables should regulators take into account to calculate this number?
3. **Key is data to find the equilibrium; right amount of scooters in the right places at the right times**

# Smart regulation

## Question 2; How many operators are needed?



1. Oslo is a 7 player market
2. The pace of technical development (software & hardware) is impressing
3. Paris & Berlin deterrent examples
4. Cities & regulation have the power to promote affordability & innovation over profits
5. **Rather more operators than more scooters**
6. This is to the ultimate benefit of the people of Oslo

# Smart regulation

## Question 3; KEY QUESTION, fostering multimodal players



1. Affordability, sustainability, mobility, nudging equals multimodality
2. Can regulation facilitate the surfacing of multimodal players emerge?
3. Incentives to support market developing in this direction
4. Tenders & tariffs
5. **At the end of the day; a multimodal player is worth more to a city than a standalone scooter operator**

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< INGENTING

# Bolt

TACK!

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