



# The Bike and Scootersharing Telematics Market

4th Edition

*The Bike and Scootersharing Telematics Market is the fourth strategy report from Berg Insight analysing the latest developments on the connected micromobility markets worldwide. This strategic research report from Berg Insight provides you with 130 pages of unique business intelligence including 5-year industry forecasts and expert commentary on which to base your business decisions.*

# The shared micromobility fleet to reach 37.8 million vehicles in 2029

Passenger cars and light trucks are the main modes of transportation in most industrialised countries. The vast majority of car trips in metropolitan areas are drive-alone trips with only one person in the car and vehicles are used for only about one hour per day on average. Bikes and scooters are shared micromobility services that are available for people who want to complement other modes of transportation. Examples of other mobility services include carsharing, carpooling, ridesharing, taxi and ridesourcing services. Many of these mobility services aim to decrease the cost of transportation, create convenience through fewer ownership responsibilities, as well as reduce congestion and environmental impact.

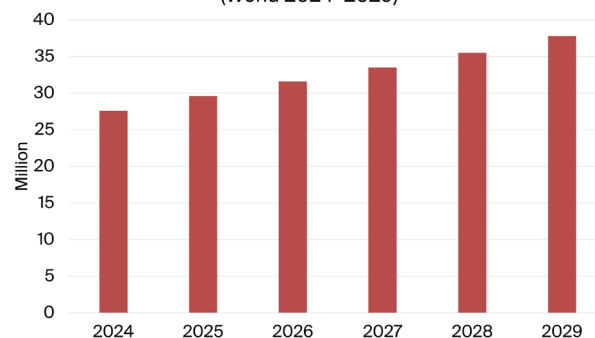
Micromobility includes shared mobility services in urban areas that offer short-term rentals of light vehicles such as bikes, scooters or other similar vehicles to paying users or communities. The services aim to reduce urban congestion, car usage and car ownership to improve the inner-city landscape and reduce air pollution. Usage is typically billed by the minute/hour with rates that include parking, fuel or charging and maintenance. The services are generally used for short trips between 0–10 kilometres. Bikes are a kind of decentralised bicycle rental service, usually focusing on short-term rentals that supplement other modes of transport including walking and public transport. Scooters services offer motorised scooters. The vehicles are usually sit-down electric scooters or stand-up electric scooters. Today, most operators use two operational models – free-floating and station-based. The station-based operational model enables members to pick up and return the vehicle at any designated station in a city. Free-floating services mean that dockless vehicles can be picked up and dropped off anywhere within a designated area. The free-floating operational model is rapidly gaining users and rides.

Telematics systems and smartphones are key enablers of bikes and scootersharing micromobility services. Micromobility services mostly comprise a telematics device for capturing trip data, enabling fleet management and granting access to the vehicle through a smartphone app. Software platforms include complete IT systems that can support all the operational activities of a micromobility operation ranging from management of in-vehicle equipment, fleet management, booking management, billing, as well as operations supervision via dashboards and data analytics. Leading vendors of end-to-end bikes and scootersharing technology such as bikes, connected bike locks, infrastructure for station-based bikes and scootersharing and software platforms include Nextbike, Lyft Urban Solutions and JCDecaux. Examples of micromobility telematics solution players include Omni Intelligent Technology, Jimi IoT, Connected Cycle, Queclink and Teltonika Telematics. Micromobility software providers include Qucit, Urban Sharing, Atom Mobility, MOQO, Wunder Mobility and CT Mobility.

Berg Insight estimates that the total shared micromobility fleet worldwide reached approximately 25.7 million vehicles at the end of 2024. Free-floating bikes was the most dominant service in terms of deployed vehicles. Berg Insight forecasts that the bikes fleet will reach 34.3 million globally by the end of 2029 and the scootersharing fleet comprising both sit-down and stand-up scooters will then reach approximately 3.5 million vehicles. The regulatory environment will have a considerable impact on the market's future. Regulators decide the types of vehicles allowed on the road, helmet requirements as well as award operator licenses that limit the number of operators and vehicles permitted.

Commercial micromobility services are offered by specialist bikes and scootersharing companies, local governments, public transport operators and other shared mobility operators. Multiple micromobility operators provide fleets with a mix of shared bikes and scooters. Leading micromobility operators with multi-modal fleets include for example Lime, Dott, Bolt, Voi and Swing Mobility. Examples of free-floating bikes operators include Hellobike, Didi Qingju and Meituan Bike in China; Anywheel in Singapore; and RideMovi, Donkey Republic and Forest in Europe. Station-based bikes systems include Nextbike, Vélib and Call a Bike in Europe; Docomo Bike Share and Hello Cycling in Japan; Bixi Montréal in Canada; and Tembici in Latin America. Leading sit-down scootersharing operators include Yulu in India; Marti Technologies in Turkey; GoShare and WeMo in Taiwan; and Cooltra and Check in Europe. Stand-up scootersharing services were first launched in 2017–2018. The market has grown significantly since then and the leading operators in this segment include Dott, Whoosh, Lime, Third Lane Mobility (Bird and Spin), MTS Urent, Bolt and Voi. There has been significant M&A activity on this market in recent years, involving diverse players from many parts of the ecosystem.

The bikes and scootersharing fleet (World 2024–2029)



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### Glossary

## Highlights from the report

**Insights** from 30 executive interviews with market leading companies.

**New data** on bikesharing and scootersharing fleets worldwide.

**Comprehensive overview** of the connected bikesharing and scootersharing value chain.

**In-depth analysis** of market trends and key developments.

**Detailed profiles** of 28 technology vendors and their propositions.

**Case studies** of 41 shared micromobility initiatives.

**Market forecasts** by region lasting until 2029.

## The report answers the following questions

- What is the current status of the shared micromobility industry?
- Which are the leading technology and telematics platform providers?
- What technology choices are there for micromobility operators?
- What micromobility services are available from leading service providers today?
- What business models are used by bikesharing and scootersharing operators?
- How will the market evolve in Europe, North America and other parts of the world?
- How will regulatory developments affect this market in the following years?
- Which trends are shaping the micromobility industry?



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CONNECTED MOBILITY

# The Bike and Scootersharing Telematics Market

What are the latest developments on the bikesharing and scootersharing market? Berg Insight estimates that the number of deployed vehicles in bikesharing schemes will grow at a CAGR of 5.9 percent from 25.7 million at the end of 2024 to 34.3 million by 2029. The number of scooters available from scootersharing services will at the same time grow at a CAGR of 12.8 percent from 1.9 million at the end of 2024 to 3.5 million vehicles in 2029. This report explains all segments including station-based and free floating bikesharing and scootersharing concepts. Get up to date with the latest information about micromobility organisations, vendors, products and markets.

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## Who should read this report?

The Bike and Scootersharing Telematics Market is the foremost source of information about the rapid adoption of connected bikesharing and scootersharing technology. Whether you are a bikesharing service provider, scootersharing operator, telematics service provider, car manufacturer, telecom operator, investor, consultant, or government agency, you will gain valuable insights from our in-depth research.

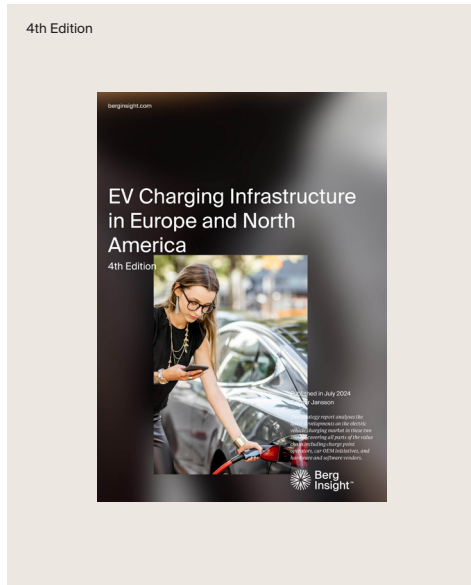
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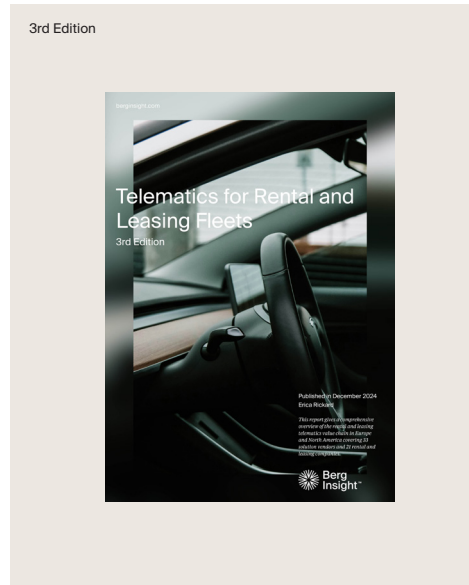


Erica is an IoT analyst covering IoT applications mainly in the automotive and micromobility sectors. She performs strategic analysis of OEM and aftermarket car telematics services, including carsharing telematics and telematics for rental and leasing fleets as well as bike and scootersharing telematics. Erica holds a Master's degree in Quality and Operations Management from Chalmers University of Technology and joined Berg Insight in 2024.

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