

**Submission
No 170**

INQUIRY INTO USE OF E-SCOOTERS, E-BIKES AND RELATED MOBILITY OPTIONS

Organisation: Beam Mobility
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Portfolio Committee No. 6 - Transport and the Arts: Inquiry into, Use of E-scooters, E-bikes and Related Mobility Options

A submission by Beam Mobility

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Introduction

Beam Mobility (Beam) welcomes this opportunity to make a submission to the *New South Wales Portfolio Committee No. 6 - Transport and the Arts Inquiry into Use of e-scooters, e-bikes and related mobility options*. At the outset, we appreciate the Committee's objectives with this inquiry to ensure that all levels of government can work with industry to continue to provide safe, efficient and sustainable alternative modes of transport such as micromobility while capitalising on future opportunities for improvement.

As per the Inquiry's terms of reference, our submission aims to cover e-mobility hire operations in NSW, their utilisation and benefits to the community, existing regulatory settings and opportunities for government to improve outcomes in regard to e-scooters, e-bikes and related mobility options. We hope this submission encourages the NSW Government to review its current regulations of micromobility, including shared e-scooter and e-bike schemes, and to consider further opportunities to responsibly expand their use in line with the needs of the community. Should you have any queries in relation to the content outlined in our submission or our operations in NSW or any other jurisdiction, please refer to the details on the cover page to make contact.

Beam proposes to the Committee that as an outcome of this inquiry, the NSW Government:

- 1) Establishes a centralised regulatory model or code of conduct for e-bike hire schemes across Sydney councils, managed by Transport for NSW.
- 2) Endorses e-scooters across the state by permanently legalising their use.
- 3) In the interim, promotes and encourages more council participation in the NSW Shared E-Scooter Trial, by:
 - a) Having more flexibility around the trial parameters (e.g., footpath riding, e-scooter speed limits, curfews) to respond to specific council needs;
 - b) Clarifying the different roles and responsibilities of TfNSW, local government and operators for delivering the program;
 - c) Increasing engagement from the NSW Premier, Minister for Transport, Minister for Roads, Minister for Regional Transport and Roads, Parliamentary Secretary for Transport, and Minister for Local Government to promote the legitimacy of e-scooter use and benefits of participating in the NSW Shared E-Scooter Trial;
 - d) Leading key educational campaigns directed at local councils and the public about the use of e-scooters in NSW and promoting ongoing engagement between councils and industry to ensure regulators understand rapid technology development in the micromobility industry.
- 4) Encourages and supports interconnectivity across local government boundaries to improve rider usability for the NSW Shared E-Scooter Trial.
- 5) Prioritises the delivery of the NSW strategic cycleway corridors and bicycle parking infrastructure.



Background

Beam is Asia Pacific's leading micromobility company, operating across Australia, New Zealand, Malaysia, Indonesia, Thailand, Japan, South Korea, and Turkey. Beam established its Australian operations in 2019 and was one of the first e-scooter operators to set up in the country. Since that time Beam has worked closely with regulators and policy makers at all levels of government to manage and roll out e-scooter and e-bike operations, through trials and subsequent contracts nationally. As a result we are now the chosen operator for shared e-scooters programs in Brisbane, Perth, Darwin, Hobart, Adelaide, Canberra, Sydney and numerous regional cities across Australia.

More recently Beam welcomed the NSW Government's e-scooter trial introduction in 2022, which is providing valuable insights and data, and demonstrating the potential of e-scooters as a viable and sustainable transport option in both regional and urban areas. Since the beginning of the trial, Beam has recorded over 199,000 trips reflecting strong and continuous demand across our operating areas. Currently we are operational in Kogarah (Sydney), Forster-Tuncurry, Armidale and Albury and have facilitated more than 294,000 kilometres of riding.

In Sydney, we have operated shared e-bikes across the inner-city area, including in the CBD, eastern suburbs, and inner west since October 2020. Beam's e-bikes in this region have proven to be highly popular, logging over 500,000 trips in the City of Sydney alone. The model enables easy access to sustainable transport without having to own a bike.

We are proud of our work in NSW and we see e-mobility as a critical enabler of tourism and business in the state. While the trials and local government contracts have been a positive step forward, there are several areas where improvements could further enhance the effectiveness and integration of e-mobility devices into the broader transport network as outlined in our submission below.



Shared E-Mobility Overview - Emerging trends and benefits

In line with the terms of reference, this section aims to provide an industry perspective on the utilisation and impact of e-mobility devices in the community.

Shared micromobility is one of the fastest-growing industries in the world, allowing communities to access their cities through sustainable, affordable and flexible transport like never before. E-mobility devices are among some of the most environmentally friendly modes of transport available for first and last-mile travel, and can improve the connectivity of existing public transport networks.

Key facts

- E-scooters support the accessibility and liveability indexes of a city and boost its tourism economy, with almost 34 percent of NSW Beam riders not owning or having regular access to a car¹.
- Where e-scooter operations are rolled out successfully, micromobility becomes a core part of the day-to-day transportation network, which positively benefits a broad range of constituents and businesses - in NSW, 70 percent of all Beam trips involve a purchase at a local business and 41 percent of riders use Beam to visit shops and local businesses².
- E-mobility is already popular in NSW, with an estimated 27 percent of NSW residents spending money on cycling and e-scooters in 2022. This is the highest economic contribution (equivalent to \$357) per capita.³
- Global consumer spending for shared micromobility is expected to reach between \$50 billion and \$90 billion by 2030⁴.
- E-scooter use has proven particularly useful in filling transport gaps, especially relating to first and last-mile travel to access public transport, with 52 percent of Beam trips replacing a car journey in NSW⁵.
- As operators spend more time in a community, they grow their depth of local knowledge and gain a better understanding of local conditions. By observing rider behaviour, temporal movement patterns and through data insights, we collaborate with regulators to tailor technology and operational practices to the needs of the area. Additionally, we use this data to inform and support the local governments we work with.

¹ Beam Mobility, *National Rider Survey Insights*, March 2024.

² Beam Mobility, *National Rider Survey Insights*, March 2024.

³ We Ride Australia, *The Australian Cycling and E-Scooter Economy in 2022*. Nov 2023.

⁴ McKinsey & Company, *Shared mobility: Sustainable cities, shared destinies*. Jan 5, 2023.

⁵ Beam Mobility, *National Rider Survey Insights*, March 2024.



Economic benefits and supporting the night time economy

E-scooter and e-bike infrastructure and programs offer significant economic benefits to communities by boosting local businesses and enhancing overall economic activity. E-scooters and e-bikes drive increased foot traffic in key commercial areas, leading to greater patronage and spending at local establishments. According to Beam's 2024 rider survey, 70 percent of trips on Beam services in NSW resulted in a purchase at a nearby business.

Moreover, these micromobility services play a crucial role in supporting the night-time economy. In Brisbane, for instance, 32 percent of Beam's e-scooter rides occur after 7 pm, highlighting the role of micromobility in extending business hours and driving evening commerce. Micromobility services help businesses maintain consistent patronage and operate efficiently during both peak and non-traditional hours. This also fosters local job creation and encourages people to shop locally due to increased visibility and accessibility.

Tourism and events

Micromobility hire schemes have become an essential part of the tourism and events scene in global cities, offering significant benefits for both visitors and local economies. Tourists now expect the convenience of micromobility devices to explore cities with ease, enhancing their experience by providing greater mobility and access to previously less accessible areas, which in turn boosts spending in diverse precincts.

During major events, Beam has found its technology to be a crucial component for organisers when managing large crowds. Around 30 percent of the e-scooter fleet is used for transportation to and from large venues, with many riders heading to central business districts and dining areas post-event. For example in the Brisbane market, Beam's e-scooters contribute to a 40 percent increase in trips on event days (such as NRL and AFL). Similarly we have experienced up to a 50 percent uplift during festivals like the Adelaide Fringe.

Enhancing transport networks

E-scooters do not replace public transport. Instead, they provide a unique accessibility option for commuters that are not within a convenient distance to their local station, which improves transport equity. E-scooters have the capability to remove the limitation of first- and last- mile travel associated with public transport, for example in Kogarah where many riders use e-scooters to get to or from the nearby train stations of Allawah, Carlton and Kogarah.

An example of Beam creating convenience for travellers accessing public transport hubs is in Brisbane this year. Beam has established a discount zone in Brisbane this year to test how well e-mobility can replace public transport with the closure of a ferry terminal. Our data showed an average of about 53 trips per day and more than \$11,600 in customer discounts over the period of 1 April to 29 May.



E-scooters provide alternatives to car based travel for short commutes, reducing congestion on the roads and promoting travel in local areas where other transport options do not exist. E-mobility infrastructure finds significant use for commuters in first and last mile trips, with over a quarter of NSW Beam riders utilising services to get to and from work and study⁶.

In existing established markets, local governments have aligned their service delivery with e-mobility hire providers to increase access. Brisbane City Council has previously stated that the vehicles can “complement the role of public transport” and acknowledged the need for “greater service integration to assist in first and last mile travel especially connecting to public transport”⁷.

As most micromobility transport options are restricted to local travel and commuting, e-scooters do not have the sole capacity to fill large transport deserts, but instead work best in conjunction with varied public transport options.

Social equity and accessibility

Micromobility improves accessibility by offering a cost-effective transport solution, making it a more budget-friendly alternative compared to public transport or rideshares. This service significantly benefits those without access to cars, bridging a gap between individuals with accessible transportation options and those who are disadvantaged in this regard. In NSW, just over a third (33.93 percent) of Beam riders do not have regular access to a car⁸; meaning access to e-scooters can play a crucial role for people that otherwise may not have the convenience of travel options.

E-scooters can also play a role in increasing transport accessibility for those with mobility impairments. Beam was the first operator to introduce seated e-scooters to our fleet in cities across Australia and New Zealand, which offer a practical choice to those who find standing e-scooters and pedal assist e-bikes challenging, such as members of the elderly or those with disability. We have seen a 30 percent increase in average distances travelled on a seated e-scooter (3.25 km average) as opposed to 2.5km on a standing e-scooter.

Rental e-scooters have notably improved urban accessibility, enabling users to make trips they might otherwise miss, including those affected by conditions like chronic pain or injury.

Sustainability

Beam e-scooters exist as part of the shift towards climate-friendly transport. Our data shows that 48 percent⁹ of rides replaced a trip usually taken in a car and over 36 percent of Beam riders in NSW believe they are less likely to purchase a car in the future with access to shared micromobility¹⁰,

⁶ Beam Mobility, *National Rider Survey Insights*, March 2024

⁷ Brisbane City Council, *Brisbane’s e-mobility strategy*. 2021-2023.

⁸ Beam Mobility, *National Rider Survey Insights*, March 2024

⁹ Beam Mobility, ‘Australia’s shocking road transport CO2 emissions visualised ahead of World Car Free Day’, September 2022.

¹⁰ Beam Mobility, *National Rider Survey Insights*, March 2024



proving e-scooters to be a climate-friendly alternative to car travel that can reduce the emissions produced on roads.

Opportunities to enable and encourage uptake of shared micromobility in NSW

The following section outlines Beam's position on opportunities to reform the regulatory framework in NSW, to achieve better and safe outcomes for riders and the community; and opportunities to improve mobility, the customer experience, safety for users and the community.

1. Improve the regulation and use of shared e-bikes in Sydney by introducing a TfNSW-led code of conduct.

Shared e-bike hire schemes offer numerous benefits for local community members, including reduced traffic congestion, lower emissions, and enhanced mobility for short to medium distances. To maximise these benefits, Beam believes that a centralised code of conduct or new e-bike hire scheme run by Transport for NSW would enable sustainable growth and effective management of bike share services.

In Sydney, e-bike share schemes are managed by individual councils as per the Inner Sydney Bike Share Guidelines set out on 22 December 2017 for the local government areas of Canada Bay, City of Sydney, Inner West, Randwick, Waverley, and Woollahra¹¹. However, these guidelines do not provide any restrictions on the number of e-bikes that can be distributed by providers at one time, where they can be parked, nor the zones in which they operate. This can lead to safety concerns, including hazardous parking which blocks pathways and causes frustration for pedestrians and people with accessibility concerns, and as a result hinders the genuine value and potential of e-bikes as a reliable and alternative transport option.

Beam proposes the following provisions for a centralised e-bike model or code of conduct led by Transport for NSW to encourage use, amenity for community members and decrease dependence on traditional transport options such as cars:

- **Caps on operators** – We see potential for some restrictions to address the over-saturation of bikes in certain regions. We are aware that at times some operators have chosen to flood single streets or localities, which can impact pedestrian access. A centralised model could implement a maximum of bikes per provider, therefore promoting responsible growth and ensuring a more balanced and organised presence among operators. This is also likely to improve amenity for pedestrians, with caps able to be scaled up by regulators to meet demand for events or reduced in off seasons.

¹¹ City of Sydney, *Inner Sydney Bike Share Guidelines*, December 2017.

- **Consultation on parking requirements** – A lack of consultation between operators and council on designated parking areas can lead to the disorderly placement of bikes, resulting in the hindrance of pedestrian pathways and public frustration. We recommend initiating a consultation process to identify the need for such areas, the benefit of alternative approaches and key locations.
- **Robust market entry and exit thresholds** – A centralised model could implement more robust entry and exit requirements. This could include the introduction of a financial commitment from providers to adhere to regulations, maintain fleet standards and encourage responsible operation within the area.

Recommendation 1: The NSW Government establishes a centralised regulatory model or code of conduct for e-bike hire schemes across Sydney councils, managed by Transport for NSW.

2. Legalising the use of e-scooters in NSW.

We propose that the NSW Government legislate the use of e-scooters beyond trial periods and establish clear operating standards as has occurred in most other Australian jurisdictions. We believe that a more efficient and effective way of operating shared e-scooter schemes is for the State Government to set the operating framework for e-scooter operations, mandating certain requirements (such as speed limits, weight limits, and fines).

Recommendation 2: The NSW Government endorses e-scooters across the state by legislating its use.

3. In the interim, promote and encourage more council participation in the NSW Shared E-Scooter Trial.

The NSW Government has been running a Shared E-Scooter Trial since 2022, yet only six councils have run a trial to date, despite high levels of operator engagement with local councils and efforts to simplify the process from the state government.

The NSW Shared E-Scooter Trial has progressed in recent months, with increased engagement between the e-scooter industry and Transport for NSW, as well as attempts to streamline the application process in June 2024. While these efforts have improved certain aspects - such as removing the requirement of a Road Safety Audit prior to participation - there remain challenges that impede e-scooter adoption in the state, particularly in Sydney.

TfNSW should also promote the potential data that can be retrieved from participation in a shared e-scooter trial particularly in metropolitan areas, where usability is high and e-scooters are well integrated into the transport network.

As the first provider to launch e-scooter operations in NSW and having run five of the six trials, Beam has seen first-hand the factors that both encourage and deter local council participation. These include strict trial parameters that act as disincentives to councils choosing to participate; a



lack of awareness of responsibility for the trial; a lack of promotion of the trial from the state government; and a lack of state-led education around the legitimacy and benefits of e-scooter use.

To prevent further delays and encourage greater uptake in participation levels across NSW, Beam advises the NSW Government to:

- (a) Grant more flexibility around the Shared E-Scooter Trial parameters to address specific council needs and to remove delays approving trial sites.

Transport for NSW's framework and parameters that govern e-scooter trials across the state have impeded council adoption, such as restrictions around footpath riding, e-scooter speed limits and curfews. Councils have expressed frustration with the Government's reluctance to allow necessary exemptions, which could improve e-scooter operations so they are fully realised as a transport solution. The below outlines some of these restrictions:

Parameter	TfNSW rules	Interstate approach	Proposed solution
Footpath riding	E-scooters are not permitted to be ridden on footpaths, limiting riders to roads with a speed limit under 50kmph and shared paths and bike paths.	<p>Most other Australian states and territories permit e-scooters on footpaths when travelling at low speeds, to ensure the safety of both riders and pedestrians.</p> <p>For example in Queensland, footpath riding is capped at 12kmph which supports the success and uptake of e-mobility options. It allows riders to connect across trial areas, ensures easy navigation and accessibility and supports the specified off-road parking.</p>	<p>TfNSW should consider removing its parameter that prohibits footpath riding.</p> <p>In the interim, TfNSW should enable councils to request an exemption to the footpath riding parameter if the council has made an assessment of the potential benefits and risks.</p> <p>TfNSW should enable councils to make this decision and provide necessary exemptions to e-scooter parameters to enable this.</p>
Maximum operating speed	E-scooters must be capped at speed limits of 20kmph on bicycle paths/lanes and roads, and 10kmph on shared paths.	<p>In Queensland and Western Australia, the maximum operating speed limits are 25kmph on separated paths and roads.</p> <p>NSW is the only Australian jurisdiction that requires a speed limit of 10kmph on shared paths. Every other jurisdiction considers shared paths and bike lanes as the same; which</p>	<p>TfNSW should allow councils to request exemptions to the speed limit parameter to respond to specific market conditions, such as where it is safer to ride at a faster speed on certain roads.</p> <p>The 10kmph limit on shared</p>



		creates better usability for riders.	paths is too slow and should be removed as a parameter; it should be treated the same as bike lanes.
Prohibition of travel on roads with a speed limit of 60kmph and over.	E-scooter users can travel on roads (including bicycle lanes) on which the speed-limit is up to 50 kilometres per hour.	In Victoria, e-scooters are allowed on roads with speed limits up to 60kmph. This is a beneficial parameter because many roads, particularly in metropolitan areas, are 60kmph and have established bike lanes that provide greater connectivity across trial areas.	The NSW Government should consider enabling e-scooter use on 60kmph roads. In the interim, Transport for NSW should make necessary exemptions to e-scooters riding across roads with a speed limit of 60kmph or over, to connect to other parts of the trial site, where there is no alternative option. This includes removing unnecessary delays to the approvals process for councils that wish to enable e-scooter access on these roads for such a purpose.
Curfew	The use of e-scooters are prohibited between 12am to 5am with an option to enable a 24 hour location if appropriate and approved by TfNSW.	In Brisbane and Hobart, curfews are established for specific locations to enable safe riding at night. For example, Brisbane City Council established a 'Safe Precincts Trial' in Brisbane CBD and Fortitude Valley where riders are allowed to ride through but not start a trip there. In these cities we see e-scooters play a significant role in supporting the night-time economy. A curfew can prevent many viable e-scooter uses, including trips taken by shift workers and commuters that have less access to public transport late at night. Additionally, our rider surveys show that many of our riders feel safer having access to e-scooters rather than walking at night.	Transport for NSW works with the Office of the 24-Hour Economy Commissioner to review its recommendation of curfews which poses negative impacts to the e-scooter industry, customers and the night-time economy. The NSW Government should also increase education around e-scooters facilitating greater connectivity between transport hubs and venues, and adding to the nighttime activation and vibrancy of the city where they operate.

- (b) Clarifying the different roles and responsibilities of TfNSW, local government and operators for delivering the program.

Successful e-scooter schemes in other Australian cities show that effective operations occur when councils and operators work directly together under broad state oversight. While Transport for NSW is now aiming to achieve this with recent changes to the application process, there remain gaps in understanding due to previously onerous processes for councils to participate in the Shared E-Scooter Trial. The NSW Government should address this gap and provide greater communication to operators and local councils to promote participation in the trial.

- (c) Increasing engagement from the NSW Premier, Minister for Transport, Minister for Roads, Minister for Regional Transport and Roads, Parliamentary Secretary for Transport, and Minister for Local Government to promote the legitimacy of e-scooter use and benefits of participating in the NSW Shared E-Scooter Trial.
- (d) Leading key educational campaigns to local councils and the public about the use of e-scooters in NSW and promoting ongoing engagement between councils and industry to ensure regulators understand rapid technology development in the micromobility industry.

Recommendation 3: *The NSW Government promotes and encourages more council participation in the NSW Shared E-Scooter Trial, by:*

- (a) Having more flexibility around the trial parameters (e.g., footpath riding, e-scooter speed limits, curfews) to respond to specific council needs;*
- (b) Clarifying the different roles and responsibilities of TfNSW, local government and operators for delivering the program;*
- (c) Increasing engagement from the NSW Premier, Minister for Transport, Minister for Roads, Minister for Regional Transport and Roads, Parliamentary Secretary for Transport, and Minister for Local Government to promote the legitimacy of e-scooter use and benefits of participating in the NSW Shared E-Scooter Trial;*
- (d) Leading key educational campaigns directed at local councils and the public about the use of e-scooters in NSW and promoting ongoing engagement between councils and industry to ensure regulators understand rapid technology development in the micromobility industry.*

4. Consideration of interconnectivity between metropolitan council areas and usability when establishing trial areas for e-scooter schemes.

A significant barrier to enhancing regional connectivity with e-scooters is the need for effective communication and cooperation between different levels of government and across jurisdictions. To ensure seamless travel for riders, it is crucial to coordinate with councils adjacent to micromobility

infrastructure, so users have clear options for parking and can travel between locations without encountering restrictive geo-fences. This interconnected approach is essential for a micro-mobility share scheme to operate smoothly and efficiently across broader areas.

Encouraging councils to collaborate and participate in a unified procurement process can further enhance connectivity and usability. By linking their efforts, councils can create a more cohesive network of e-scooter infrastructure, reducing fragmentation and improving the overall rider experience. This cooperative model allows for consistent standards and seamless integration of services, facilitating better regional coverage and ensuring that e-scooters are a viable and convenient transportation option across various communities.

***Recommendation 4:** The State Government encourages the uptake of larger tender areas for e-mobility hire schemes or consider integration in the state transport network.*

5. Prioritise the delivery of the NSW strategic cycleway corridors and bicycle parking infrastructure.

There are significant barriers to fulfilling the benefits of active transport in NSW, and thus increased uptake of micromobility share schemes, due to a lack of safe and connected infrastructure. Safety and convenience are two major motivating factors to active transport use, with 70 percent of Sydneysiders saying they would take up cycling at least once a week if it was safer¹². The Government must consider emerging sustainable transport technologies including hire e-scooter vehicles which are made more accessible and safer when there is reliable infrastructure in place.

It is vital that the NSW Government prioritise cycleways that are well connected, safe, accessible, and planned in consultation with the community. The NSW Government has developed strategic cycleway corridors across Greater Sydney – with other parts of NSW currently in development – identifying more than 85 bike lanes totalling to over 1,000km of infrastructure that connect key hubs in the city¹³. This is a very encouraging proposal and is in line with our considerations, however there is no specific indication on when these lanes will collectively be delivered.

Further, for cycling and micromobility to be considered as a viable alternative to other forms of transport, it is important that the Government prioritises dedicated active transport lanes rather than shared paths.

***Recommendation 5:** The NSW Government prioritises the delivery of the NSW strategic cycleway corridors and related parking infrastructure.*

¹² Committee for Sydney, 2021. *Making Sydney a Cycling City*. <https://sydney.org.au/wp-content/uploads/2021/05/Committee-for-Sydney-Making-Sydney-a-cycling-city-May-2021.pdf>

¹³ Transport for NSW, 2022. *Strategic cycleway corridors for Greater Sydney*. <https://www.transport.nsw.gov.au/operations/walking-and-bike-riding/strategic-cycleway-corridors>



Conclusion

As the leading organisation operating in the micromobility and active transport space in NSW, and throughout the nation, we believe that the NSW Government has a major opportunity to encourage the uptake of these alternative modes of transport into the future with the right regulatory frameworks in place. Both e-bikes and e-scooters are essential components of the future transport network. A balanced regulatory approach that fosters collaboration, innovation, and safety will maximise their benefits. Beam looks forward to working with the Government, local councils, and stakeholders to create a cohesive and efficient e-mobility ecosystem in NSW.

Beam would like to emphasise that we are grateful to have had the opportunity to contribute on this critical topic. We encourage the NSW Government to consider the recommendations and welcome the opportunity to contribute further.

Kind regards,

General Manager ANZ
Beam Mobility