

1A

E-scooter Deployment Specification

This e-scooter Deployment Specification includes requirements for the e-scooter trial, alongside supplementary technical requirements. It is assumed these requirements won't change during the trial period.

These specifications will apply across all the West Midlands trial zones (this includes areas such as Kenilworth that are not part of the West Midlands Combined Authority constituent area, but as a non-constituent area is electing to participate in the West Midlands trial). Zone-specific geographic features are outlined in the area definition documents attached to this tender.

Detailed vehicle and data gathering specifications are NOT included in this document. These are mandated by the Department for Transport (DfT). All providers seeking to provide a response to this tender need to confirm their vehicle and data standards conform to the developing DfT specifications.

Please note, that unlike the Operation (Zone) Playbook (Annex 1B) the Deployment Specification will not Zone specific and will apply universally.

Document Revisions

- 1.1 The specification outlines the rules that providers will need to adhere to from the outset of the trial. It includes a fixed set of requirements.
- 1.2 Rules for private land included as part of the trial zones (such as university campuses) have not been finalised yet (beyond the requirement for full agreement by the land owner) and may have to differ from this specification.
- 1.3 If, for purposes of a trial feasibility, trial safety or other critical function these specifications need to be modified, this will be undertaken via the specified change control process.

During the Trial the relevant LHA will allow the deployment of an electric vehicle sharing system within City's jurisdictional boundaries by the Operator, based on satisfaction of the following requirements:

2. Users

- 2.1. With regards to the use of e-scooters, Operators will ensure that:
 - 2.1.1. the use is limited to those over 16 years old and holding a (minimum) relevant provisional driving licence;
 - 2.1.2. users shall be strongly encouraged by the Operator to wear a helmet and other relevant PPE;
 - 2.1.3. all users shall be required to undertake training as deemed appropriate by the Operator and local highway authority to ensure the safety of the user and others in the operational environment. This will be done in accordance with any national guidance and/or legislation. As a minimum threshold on training:

- 2.1.3.1 riders must agree to rules about where to ride, how to ride and how to park at the first time of use with appropriately timed reminders. Operators are encouraged to use clear and creative messages to make rules memorable.
- 2.1.3.2 operators must collaborate with Transport for West Midlands (TfWM) and the local authorities (LAs) in communicating the trial zone rules.
- 2.1.3.3 operators should consider offer one to one training sessions (ensuring that social distancing rules that apply are always followed) as part of their engagement with the community.
- 2.1.3.4 operators are required to inform and train users about how to safely park e-scooters without obstructing other road users, especially people with disabilities. Operators are encouraged to specifically inform e-scooter users on the potentially negative impacts of e-scooters on people with disabilities and the importance of following parking (and riding) rules.
- 2.1.3.5 operators should also consider incentivisation to maintain desired behavioural practises, limiting speed levels for new riders and / or extended training programmes.
- 2.1.4 user access to the e-scooter shall be controlled and limited to a booking and payment system to which individual hires/uses can be recorded and attributed to a specific user. The length of hire can be governed on a per minute basis through to daily, weekly or monthly hire period (depending on the market requirements);
- 2.1.5 use of the e-scooter is monitored to ensure appropriate and responsible behaviour by the user, with the users behaving irresponsibly being barred from further participation;
- 2.1.6 e-scooters are to be ridden only public roads of 30mph speed limits or lower and where available, in bike lanes and bike paths. e-scooters should not be ridden on private land unless the land owner has granted explicit permission to the individual operator. e-scooters are to stay to the [left] of street lanes and to offer the right of way to bicycles in bike lanes and on bike paths.
- 2.2 Operators shall work with local businesses or other organisations to promote the use of helmets by system users through road safety partnerships, promotional credits, and other incentives.
- 2.3 Operators will undertake an equalities and inclusion assessment of their Trial Zone activity, which will be maintained and reviewed periodically to ensure currency at all time and shall be published openly.
- 2.4 Operators will comply with all national law and guidance pertaining to equalities and inclusion.
- 2.5 Operators will also undertake and maintain a robust Data and Privacy Impact Assessment which they will publish and ensure compliance with. The data policies and practices employed will be designed to allow sharing of key operational and performance data with the DfT, TfWM, local Police force, WMCA and/or LHA.
- 2.6 Operators will provide an information push service to their users for formal traveller research, travel behaviour change campaigns and road safety information and campaigns as established by the WMCA/TfWM and LHAs.

- 2.7 Operators must have a dedicated local manager for the Trial with whom any urgent issues can be raised.
- 2.8 Operators must provide clear public and user information on the terms and conditions and pricing structures (including offers) which they put in place and updates on changes in pricing
- 2.9 In the event on an incident on the highway the operator should be compliant in providing relevant data and information to enforcement bodies. Proof of insurance should be made available at the request of relevant enforcement bodies.

3. e-scooters

- 3.1 e-scooters deployed by the Operator shall only be those which are compliant with the license granted by the DfT for the Trial period and which are compliant with the relevant national regulations and vehicle type approval. Operators must not deviate from the specified capability at any point during the trial. e-scooters shall additionally be capable of:
 - 3.1.1 being located at anytime;
 - 3.1.2 being able to be self-standing;
 - 3.1.3 being lit during use by clearly visible forward and rearward facing lighting;
 - 3.1.4 reporting a fallen over status or status of not being parked in accordance with the parking policy set out in the relevant Trial Zone Playbook;
 - 3.1.5 being remotely limited to a speed lower than the e-scooters maximum in accordance with the Trial Zone Playbook and / or experience of the user; and
 - 3.1.6 being appropriately, provisioned, protected and safely maintained by the Operator for use during a COVID-19 pandemic.
 - 3.1.7 has a means of, rider operated, audible alert (e.g. bell or horn)
- 3.2 There shall be clear visible association with the formal West Midlands e-scooter trial so as to be distinctive from other privately owned and/or illegal use of e-scooters on the highway.
- 3.3 The Operator shall provide easily visible contact information and identification means on each e-scooter for LHA employees and/or members of the public to make relocation requests or to report other issues with devices. Communications will be facilitated through multiple channels as required to enable access and inclusion for all.
- 3.4 e-scooters will be maintained in a good state of repair and cleanliness at all times by the Operator. In the event a safety or maintenance issue is reported for a specific device, that e-scooter shall be made unavailable to users (for example designated "maintenance mode") and shall be removed from service within 24 hours of notification.
- 3.5 In respect to cleaning, each scooter requires a disinfected clean on all touchpoint areas (handlebars, brake levers, lights) at least once a day by the operator. Provision to enable customers to disinfect before and after use is also desired.
- 3.6 Any inoperable or unsafe e-scooter shall be repaired before it is put back into service.
- 3.7 The Operator will take full responsibility for managing any issues of e-scooter theft, vandalism and recovery of abandoned vehicles or those which have been littered by non-users. Operators will accept that the Police do not have the resource to allow them to investigate such issues.

4. Fleet size

- 4.1 The total Operator e-scooter fleet size deployed into an individual Trial Zone will be managed so that utilisation rates per e-scooter within a weekly rolling average 24 hour period are no less than one ride per day. This will be supplemented by an additional down time factor allowance of 5 spare e-scooters per 100 of deployed fleet per Operator which can maintain a lower utilisation rate.
- 4.2 If there are multiple Operators within a Lot each Operator will comply with above utilisation requirement, with a period of exemption being granted for the two months of operation to allow a period of demand ramp-up. During this first two month operation and demand ramp-up the Operator and LHA will monitor deployment and utilisation with reference to the above criteria but so as to ensure sufficient availability of e-scooters to stimulate demand without prejudice to the management and operation of the public realm.
- 4.3 Whether there is a single Operator or multiple Operator providing fleet into a Trial Zone, irrespective of utilisation rates, a minimum available total fleet deployment will be maintained at no less than 1 e-scooter per 250 head of population of the relevant trial zone. If within this minimum fleet size provision the minimum utilisation rate requirement cannot be met for an extended period of time (minimum of 3 months of operation) the parties shall consider the scheme viability within the Trial Zone and changes to a Trial Zone or termination of operations in that Trial Zone.
- 4.4 Where multiple Operators are operating fleet within a Trial Zone through the relevant governance they shall work together to ensure overall compliance with the fleet size requirements.
- 4.5 Operators shall provide prior to commencement of the Trial an estimated initial fleet size requirement and estimated ramp-up period. Operators will manage total fleet size per Trial Zone to within +/- 10% of this total fleet size for the duration of the Trial, unless otherwise agreed with the LHA and with reference to the utilisation rate which will be the guiding rationale for change.
- 4.6 The operator shall monitor the distribution of e-scooters across the trial zones ensuring the overall supply / demand balance is maintained through physical redistribution of e-scooters such as may be necessary

5. Other road users and the public

- 5.1 The Operator will maintain a responsive reporting and public communications channel throughout the Trial for other road users and members of the public to report concerns about e-scooter usage.
- 5.2 Company shall maintain 24-hour customer service for customers to report safety concerns, complaints, or to ask questions via phone, e-mail or chat. This service must be inclusive and accessible to all.
- 5.3 Throughout the Trial the Operator(s) will pay special regard to the needs of vulnerable road users, adjusting their operation, fleet management, onboard vehicle technologies and user guidance/training so as to address issues and concerns should these occur.

- 5.4 Operators must provide TfWM and the LAs with contact details for the local programme and fleet managers and promptly inform of any changes in the contact details. Operators are expected to maintain clear and open communication with TfWM and the LAs as it is essential for a collaborative relationship.

6 Parking

- 6.1 Operators shall maintain suitable operational management practices and user incentives (including incentives to non-actively hiring registered users) to ensure parking of e-scooters is managed without detriment to the public realm and is contained to the designated parking areas.
- 6.2 Trial Zone specific requirements will be captured in the Operational Zone Playbook, but all Operators will design and operate their service in such a way so as to ensure users comply with the following parking principles:
- 6.2.1 users of e-scooters shall park devices upright in designated areas responsibly beside a bicycle rack or in another area specifically designated for bicycle or e-scooter parking, where available;
 - 6.2.2 users shall not park e-scooters in such a manner as to block the pedestrian thoroughfare, any emergency facility or utility pole or box;
 - 6.2.3 users shall not park e-scooters in such a manner as to impede or interfere with the reasonable access to or from any building;
 - 6.2.4 users shall not park e-scooters in such a manner as to impede or interfere with the reasonable use of any bicycle rack; and
 - 6.2.5 users shall not park e-scooters in the landscape/furniture zone directly adjacent to or within the following areas, such that access is impeded:
 - (a) transit zones, including bus stops, shelters, passenger waiting areas, and bus layover and staging zones, except at existing bicycle racks;
 - (b) loading zones;
 - (c) disabled parking zone;
 - (d) street furniture that requires pedestrian access (for example - benches, parking pay stations, bus shelters, transit information signs, etc.);
 - (e) curb ramps;
 - (f) entryways; and
 - (g) driveways.
- 6.3. The Operator shall respond to reports of incorrectly parked e-scooters, or reports of unsafe/inoperable e-scooters by relocating, re-parking, or removing the e-scooters, as appropriate, within the timing guidelines below:
- a) If reported between 6am-midnight: 2 hours (1 hour in green zones)
 - b) If reported between midnight- 6am: 4 hours

Performance and geo-spatial statistics will be recorded by the Operator in a system accessible to the TfWM/LHA shared on incidents and response time.

- 6.4 Persistent poor adherence to the principles set out above will be escalated within the agreed governance mechanisms and if left unaddressed may result in the TfWM requesting the DfT to revoke the Operator's licence.
- 6.5 In order to comply with the region's commitment to decarbonisation, operators must use electric vehicles or cargo bikes to reposition the e-scooters.

7 Usage guidance

- 7.1 The Operator shall provide notice to all users through a mobile or web application that sets out clear information on where and how e-scooters can and should be used in the Trial Zone so as to be compliant with the law and with any specific Trial Zone requirements.
- 7.2 Operators will back this up with appropriate automatic controls such as geo-fencing and speed limitation. The user guidance and minimum requirements for a user training are outlined in this document and the Zonal Operational Playbook. Rules surrounding use include but not be limited to the following:
 - 7.2.1 e-scooters are to be ridden on streets, and where available, in bike lanes and bike paths;
 - 7.2.2 e-scooters are to stay to the left of street lanes and to offer the right of way to bicycles on bike lanes and bike paths;
 - 7.2.3 helmets are encouraged for all users;
 - 7.2.4 parking must be managed;
 - 7.2.5 riding responsibly is encouraged and repeated disregard of the guidance will result in the user being barred from access for the duration of the Trial;
 - 7.2.6 the Operator shall provide education to e-scooter riders on the Trial Zones existing rules and regulations, safe and courteous riding, and proper parking.
 - 7.2.7 The use of e-scooters is not permitted on footways. Additional local restrictions apply in each trial zone which are detailed in the area descriptions. Local restrictions apply to ensure the safety of e-scooter users on busy parts of the road network, the safety of other vulnerable road use in busy areas, and to facilitate social distancing.
- 7.3. Temporary riding and parking restrictions may apply in the case of events (such as festivals, football matches) and because of highway works. Operators must comply with these restrictions and join LAs in informing the public about them.

8 Ticketing and payments integration

Operators will work with TfWM to integrate their booking and payments system with the West Midlands Swift smart-ticketing platform at the earliest feasible opportunity during the Trial. Technical details will be provided to aid Operators in this process.

9 Equality aspects

- 9.1 Operators are strongly encouraged to familiarise themselves with the demographic and economic profile of the trial areas and work with LAs to develop discounts, training and engagement programmes that focused on deprived areas.
- 9.2 In order for TfWM and LAs to be able to monitor equity and accessibility aspects of the programme, operators must provide them with clear information about the pricing structure of using e-scooters and of any changes planned at least a week in advance.
- 9.3 Pricing information, including any surcharges must be clearly explained to users in the beginning of each journey.
- 9.4 Operators are strongly encouraged to provide non-digital rental route, for those who do not have access to a bank account or a smartphone.
- 9.5 Include a clear outline of Discount pricing and programmes for specific groups (e.g. students, low income, at-risk populations)

10. Vandalism and Theft

- 10.1 The operator is activity encouraged to fit anti-theft devices to each vehicle, namely wheel locking mechanism, alarms and vehicle location devices.
- 10.2 In the event of any theft or vandalism incident the supplier is obliged to inform the local enforcement representative and the LHA so instances can be monitored.
- 10.3 The cost of replacement and repair shall be covered by the e-scooter supplier.

11. Rollout

Elements governing the rollout of e-scooters is covered in the Operational Playbook (Annex – 1B)