

Dockless e-bikes in London

Data analysis

September 2026



LONDON ASSEMBLY Research Unit
LSE Master of Public Policy

Overview

This data analysis, produced by the London Assembly Research Unit and postgraduate students from the Master of Public Policy (MPP) at the London School of Economics and Political Science (LSE), provides an overview of dockless e-bikes in London. It includes information on what dockless e-bikes are, where they operate in London, challenges caused by dockless e-bikes, and how their operation is controlled by boroughs.

The information presented in the report is based on published data from a range of sources and dockless e-bike operator platforms. Some information is sourced directly from primary research undertaken by the LSE MPP group.

About the Research Unit

The London Assembly Research Unit provides an impartial research and information service. We undertake research and analysis on key issues in London to inform the Assembly's work.

All of our publications are available at:

<https://www.london.gov.uk/who-we-are/what-london-assembly-does/london-assembly-research-unit-publications>

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Cover image credit: Becka Storer

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1 Introduction

Overview

This section provides an introduction to dockless e-bikes, including what they are, how they operate, and their history in London.

Source information

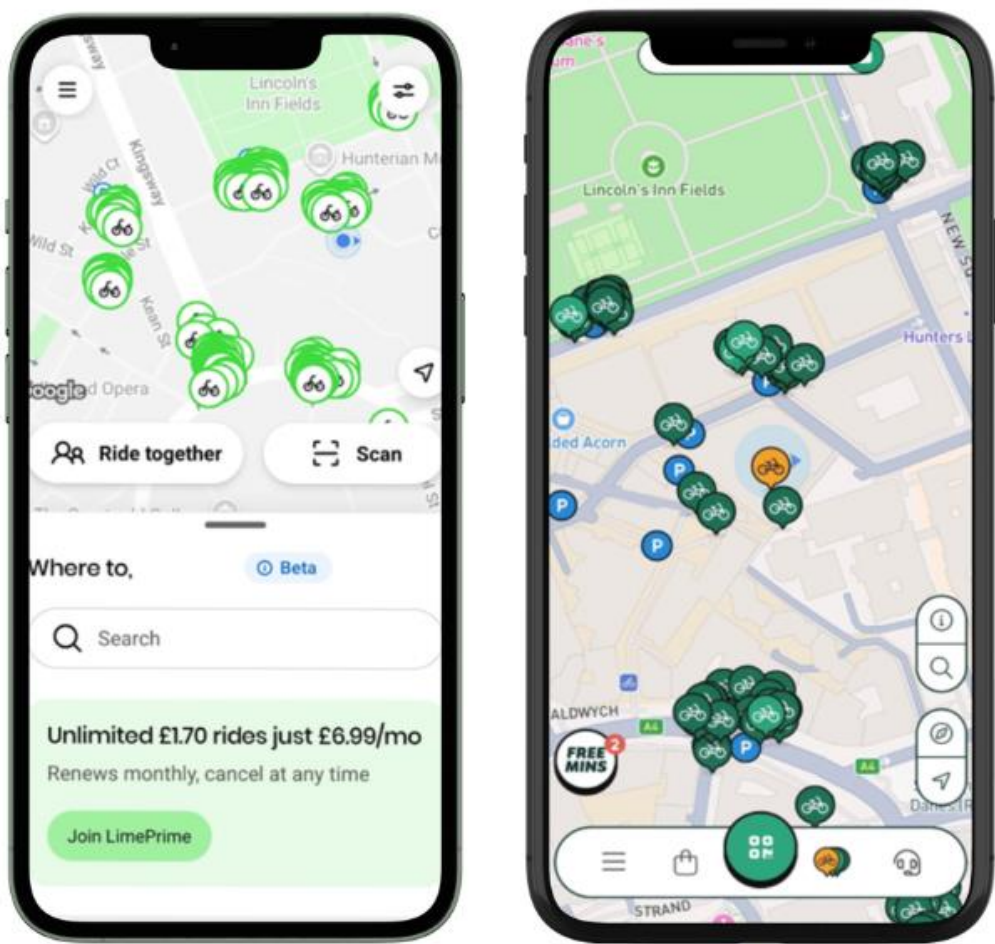
The data in this section comes from dockless e-bike operators, including app data and press releases, and media reports.

What are dockless e-bikes?

Dockless e-bikes are electrically assisted shared bikes that do not require fixed docking stations. Users can locate and rent these bikes via smartphone apps which use GPS technology to show available bikes nearby.

There are a number of different dockless e-bike operators in London, including Lime, Forest, Voi and Bolt ([see section 3](#)).

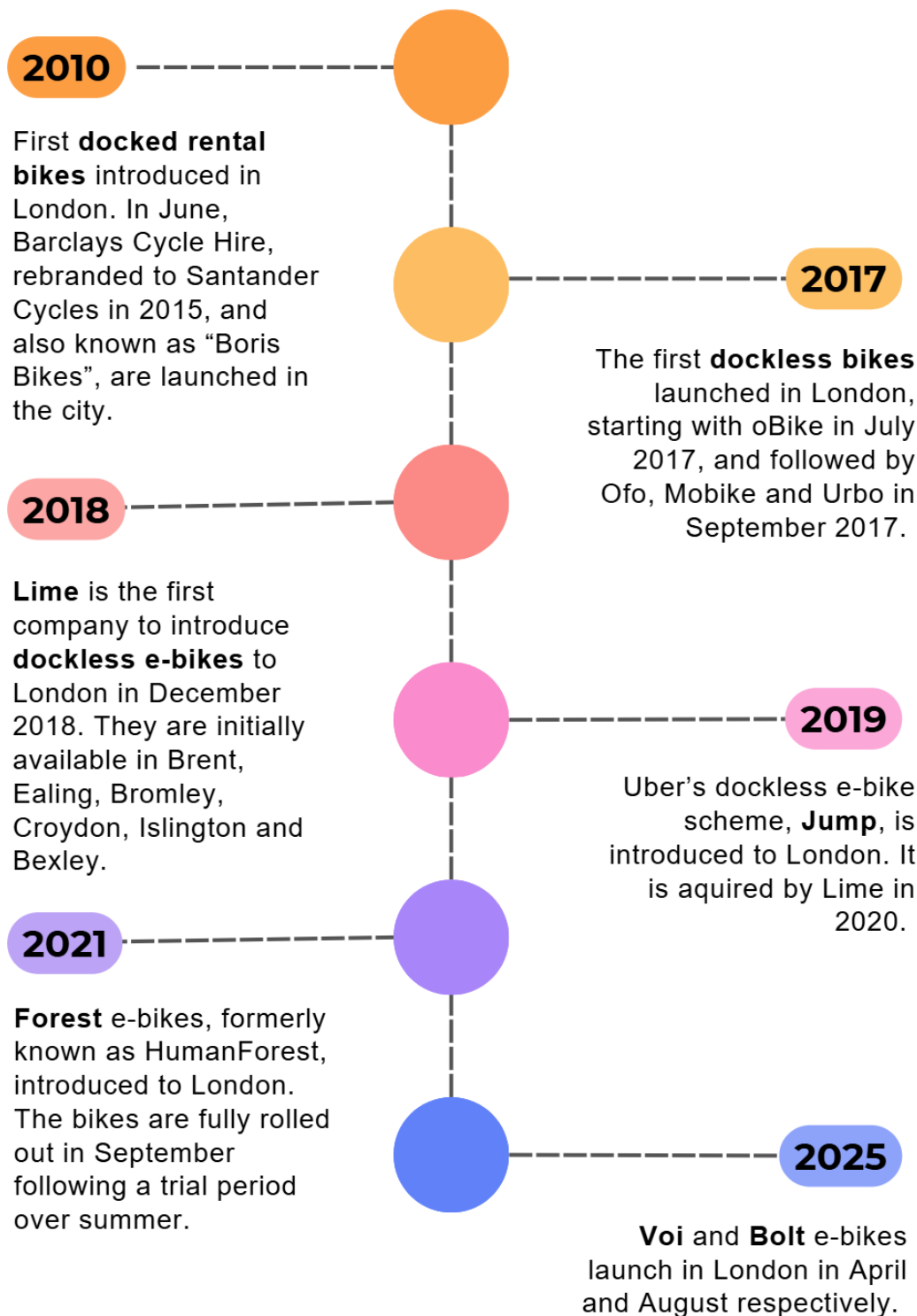
Screenshots showing how users can locate available dockless e-bikes on the Forest and Lime apps



Source: Jaramillo, V., Aaradhi, A., Fujimoto, H., Nakamura, K., Screenshot from the Forest and Lime Apps, taken on 1 June 2026.

Lime introduced the first dockless e-bikes to London in December 2018

Timeline of rental bike operation in London



Source: TimeOut, [London’s rental bikes: a \(wobbly\) history](#), July 2019; Forest, [HumanForest to launch e-bikes in London this summer](#), 24 June 2021; Voi, [Voi e-bikes arrive in London](#), 19 April 2025; Bolt, [Bolt expands e-bike fleet ahead of London transport strikes](#), 22 April 2026.

2 Cycle journeys in London

Overview

This section explores levels of cycling in London. It looks at overall cycle journeys in the city, as well as estimates of journeys taken by docked and dockless e-bikes.

Source information

The data in this section comes from Transport for London (TfL) and shared mobility company Fluctuo.

Journey data is not routinely published by dockless e-bike companies. As such, there are no definitive publicly available figures for the volume of dockless e-bike journeys in the capital, although TfL has published estimates.

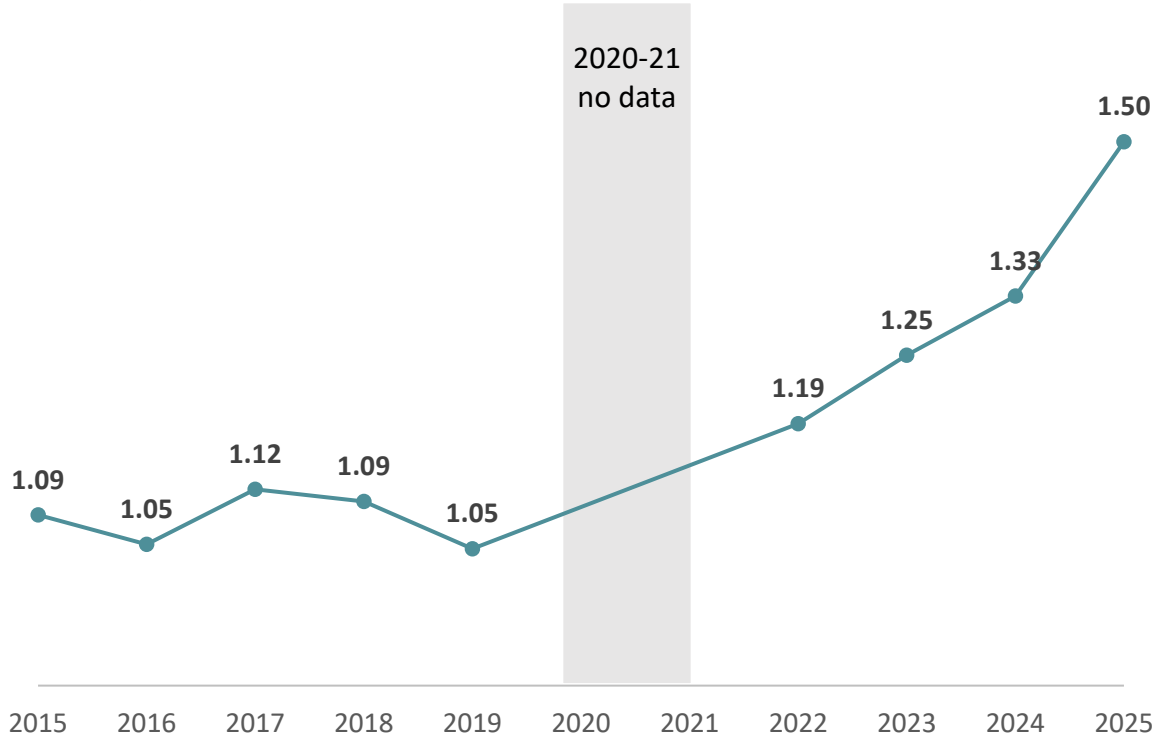
Cycle journeys in London have increased since 2019

TfL’s [Cycling action plan 2](#) aims to support the proposals set out in the [Mayor’s Transport Strategy](#). One of the key targets in the action plan is to reach 1.6 million daily cycle journey stages in London by 2030.

Since 2019, the number of **total** cycle journeys has increased year-on-year in the capital. In 2025, there were an estimated 1.5 million daily cycle journey stages across London, an increase of 13 per cent since 2024 (1.33 million) and 43 per cent higher than before the pandemic in 2019 (1.05 million).

TfL has stated that the rise in daily cycle journey stages could be due to several factors, including an increase in dockless cycle hire journeys in London. It estimates that approximately **ten per cent** of cycle journey stages in London in 2024 could have been made on dockless e-bikes from private operators.

Estimated daily cycle journey stages (in millions) in London, seven day-week average, from 2015 to 2025.



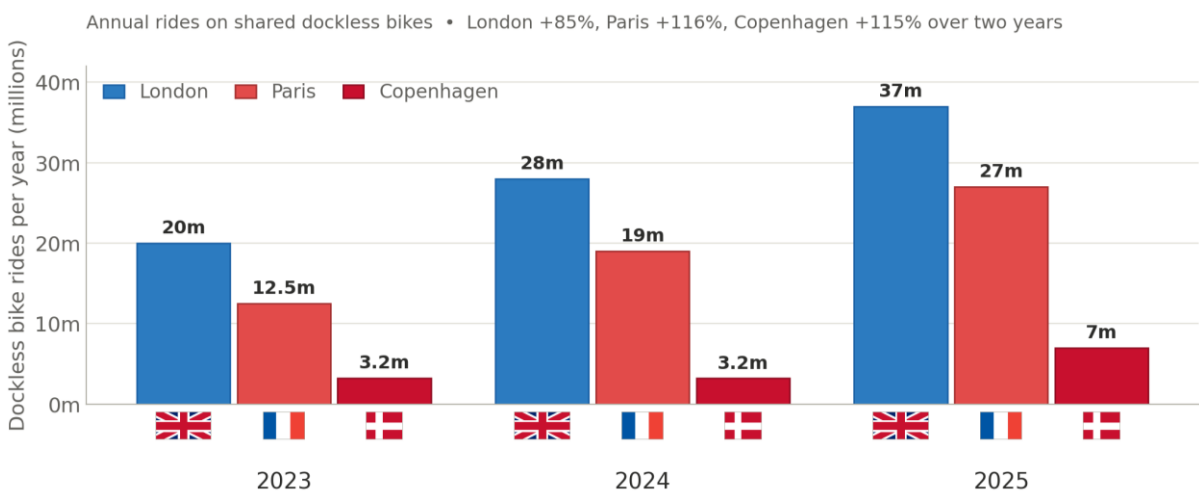
Source: TfL, [Travel in London 2025 Annual overview](#), December 2025, p.23-4. Journey stages are parts of trips which may include other modes. Data is missing for 2020-21 and 2021-22 due to the impacts of the coronavirus pandemic.

There were an estimated 37 million dockless e-bike journeys in London in 2025

According to shared mobility company Fluctuo, **37 million trips** were taken by dockless e-bikes in London in 2025. This was an increase of **32 per cent** on the previous year (28 million trips).

Fluctuo reported that this was the highest ridership of dockless e-bikes in absolute terms in Europe. This does not account for the size of each city’s population.

Top three European cities for number of dockless e-bike journeys, 2023-25



Source: Fluctuo, [European Shared Mobility Report](#), 2023, 2024, 2025. The report methodology states that data was collected “directly from operators (via their app), open data sources, mobile applications and public announcements. Industry averages and selective data extrapolation were used to fill in the gaps” and cannot be independently verified.

Ridership of docked e-bikes in London is lower than dockless e-bikes

In comparison to dockless cycle hire, ridership on London’s docked cycle hire scheme is lower. In 2024, TfL estimated that approximately two per cent of total daily cycle journey stages in London were made on Santander Cycles, TfL’s cycle hire scheme. In comparison, approximately ten per cent of cycle journeys were made by dockless e-bikes.

In 2025, Santander Cycles recorded 9.1 million hires, an increase from 8.8 million in 2024, but down from 10.4 million in 2019. According to TfL, the decline in Santander Cycle hires from 2023 was attributed to changes in the fare structure introduced in late 2022. It also suggested that changes to the cycle hire market, such as an increase in dockless e-bikes, has contributed to the decrease in hires of docked cycles.

TfL estimated that of total cycle journeys in 2024...

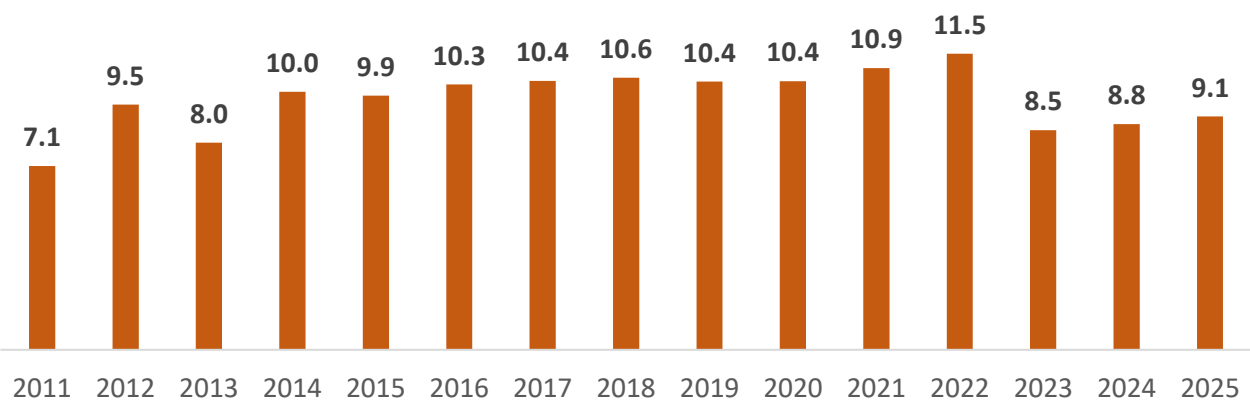


2 per cent were made by **docked** bikes



10 per cent were made by **dockless** e-bikes

Annual hires (in millions) on Santander Cycles in London, 2011 to 2025



Source: TfL, [Travel in London 2025 Annual overview](#), December 2025. Annual hires data taken from London Datastore, [Number of Bicycle Hires](#), accessed 20 July 2026.

*Santander Cycles only cover an area around central London but are largely unavailable in most parts of outer and inner London.

3 Where dockless e-bikes operate in London

Overview

This section explores the areas in London where dockless e-bikes are available, including which companies operate in each borough.

Source information

The data in this section comes from boroughs, dockless e-bike operators, app interfaces, TfL, and media reports. Which areas dockless e-bikes operate in is liable to change over time as boroughs negotiate new agreements and pilot schemes start and end. All precautions have been taken to capture accurate data as of August 2026, but where ongoing negotiations are taking place, some discrepancies may exist.

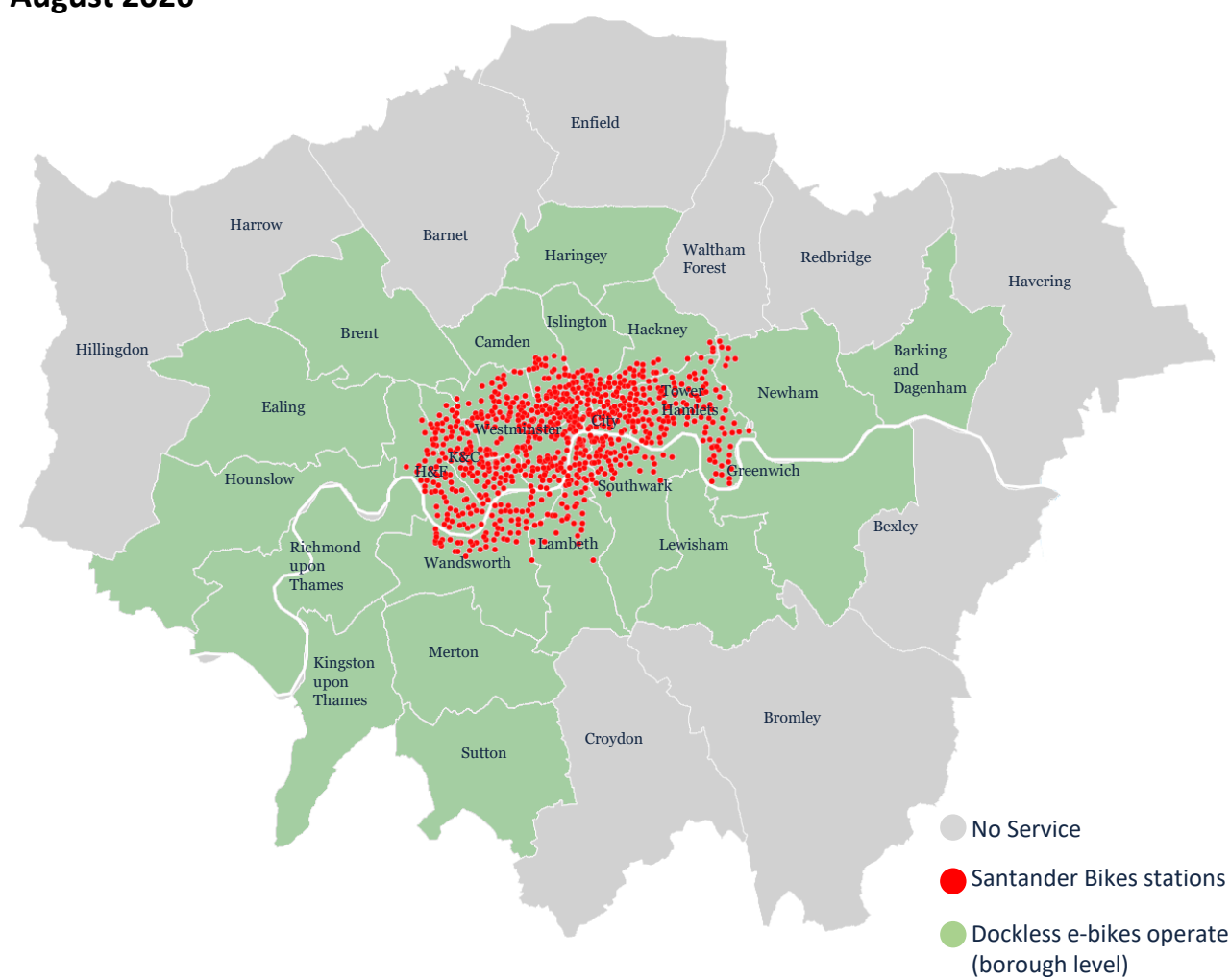
Please note, in some instances bikes from an operator that does not officially operate in a borough can still be ridden through the borough. There have also been reports of bikes being parked in boroughs in which the relevant e-bike company does not formally operate. This section presents data on where bikes operate based on where a user should expect to be able to start or end a journey.

Dockless e-bikes operate across a wider area than docked bikes in London

Dockless e-bikes serve a much greater proportion of London than docked Santander Cycles. Santander bike docks are clustered in central London, with 11 boroughs that have at least one Santander docking station.

In contrast, dockless e-bikes currently operate in 24 London local authorities, including Outer London boroughs such as Hounslow, Ealing and Kingston upon Thames. In general, more Outer west London boroughs have dockless e-bikes operating within them than Outer east London boroughs.

Santander docking stations and boroughs where dockless e-bikes operate, August 2026



Source: TfL, [Bike Point API](#), extracted on 8 June 2026. Map created by Jaramillo, V., Aaradhi, A., Fujimoto, H., Nakamura, K. Information on dockless e-bike coverage collected from boroughs’ official websites, dockless bike apps and media reports. Map produced using Datawrapper and ArcGIS.

Central London boroughs have a higher concentration of dockless e-bike operators

The number of dockless e-bike companies operating in each borough differs across London. Central London boroughs such as Hammersmith and Fulham, Kensington and Chelsea and Westminster have four operators each (Lime, Forest, Voi and Bolt), while boroughs like Sutton and Richmond upon Thames have a single official operator.

In general, central London boroughs have a higher number of operators compared to outer London boroughs. Ten London boroughs, all located in Outer London, have no dockless e-bikes in operation.

Number of dockless e-bike operators per borough



Source: Jaramillo, V., Aaradhi, A., Fujimoto, H., Nakamura, K. Information on dockless e-bike coverage collected from boroughs’ official websites, dockless bike apps and media reports. Map produced using Datawrapper.

Lime’s operation extends from central to North London

Lime bikes are operational in 18 boroughs of London, including the City of London. Lime mainly operates in central and north-west London boroughs. Lime operates in a small area in Newham around Stratford and Canning Town.

Boroughs where Lime operates in London

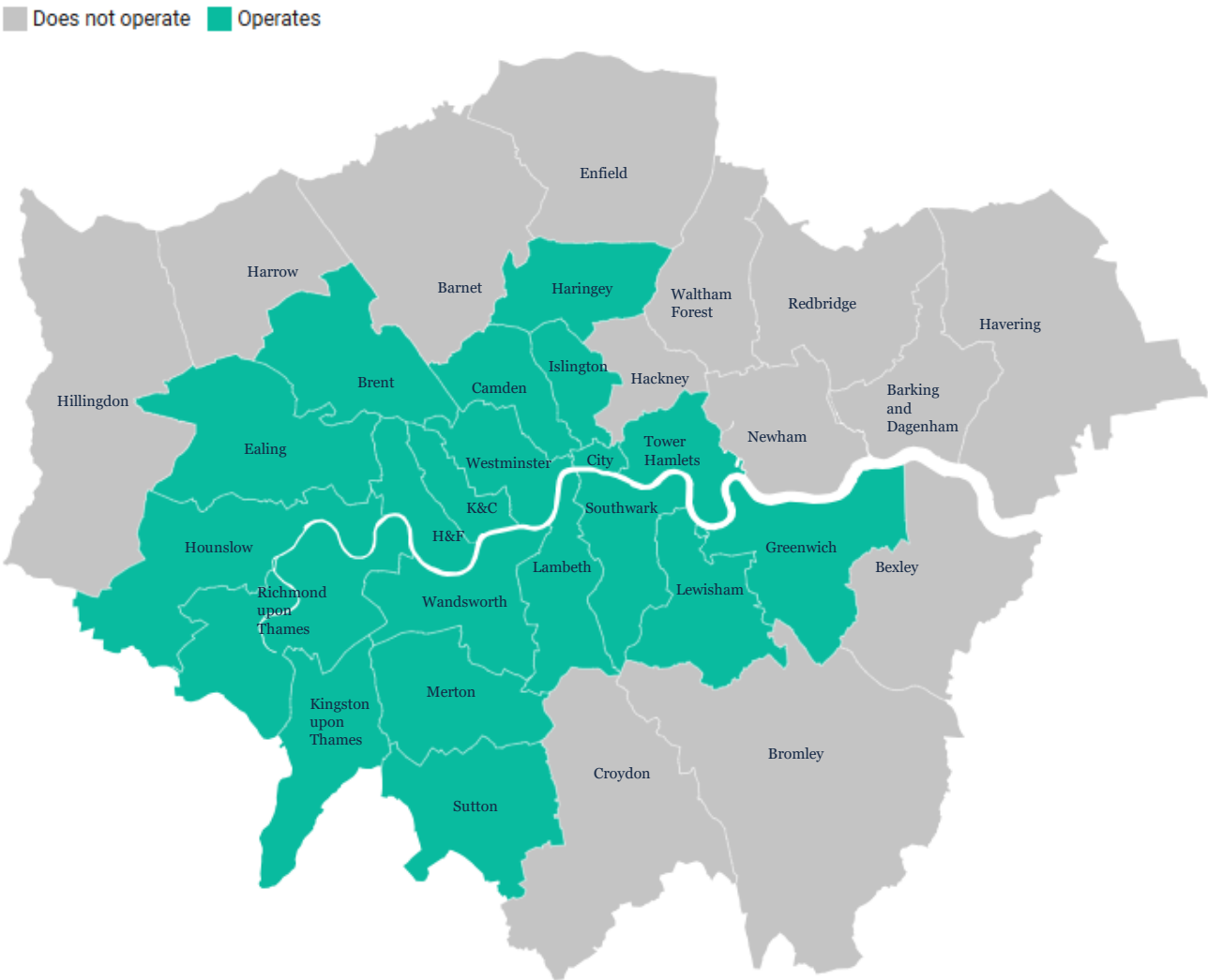


Source: Jaramillo, V., Aaradhi, A., Fujimoto, H., Nakamura, K. Information collected from the Lime official app, consulted on 5 Aug 2026. Additional data based on analysis of Borough websites and media reports. Map produced using Datawrapper. Lime is operational in small areas of Newham around Canning Town and Stratford.

Forest bikes operate in the most London boroughs

Forest is operational in the highest number of boroughs in London (20 including the City of London). While both Forest and Lime serve central London boroughs, Forest operates in a number of additional Outer London boroughs in the south-west, such as Hounslow, Richmond upon Thames, and Kingston upon Thames.

Boroughs where Forest operates

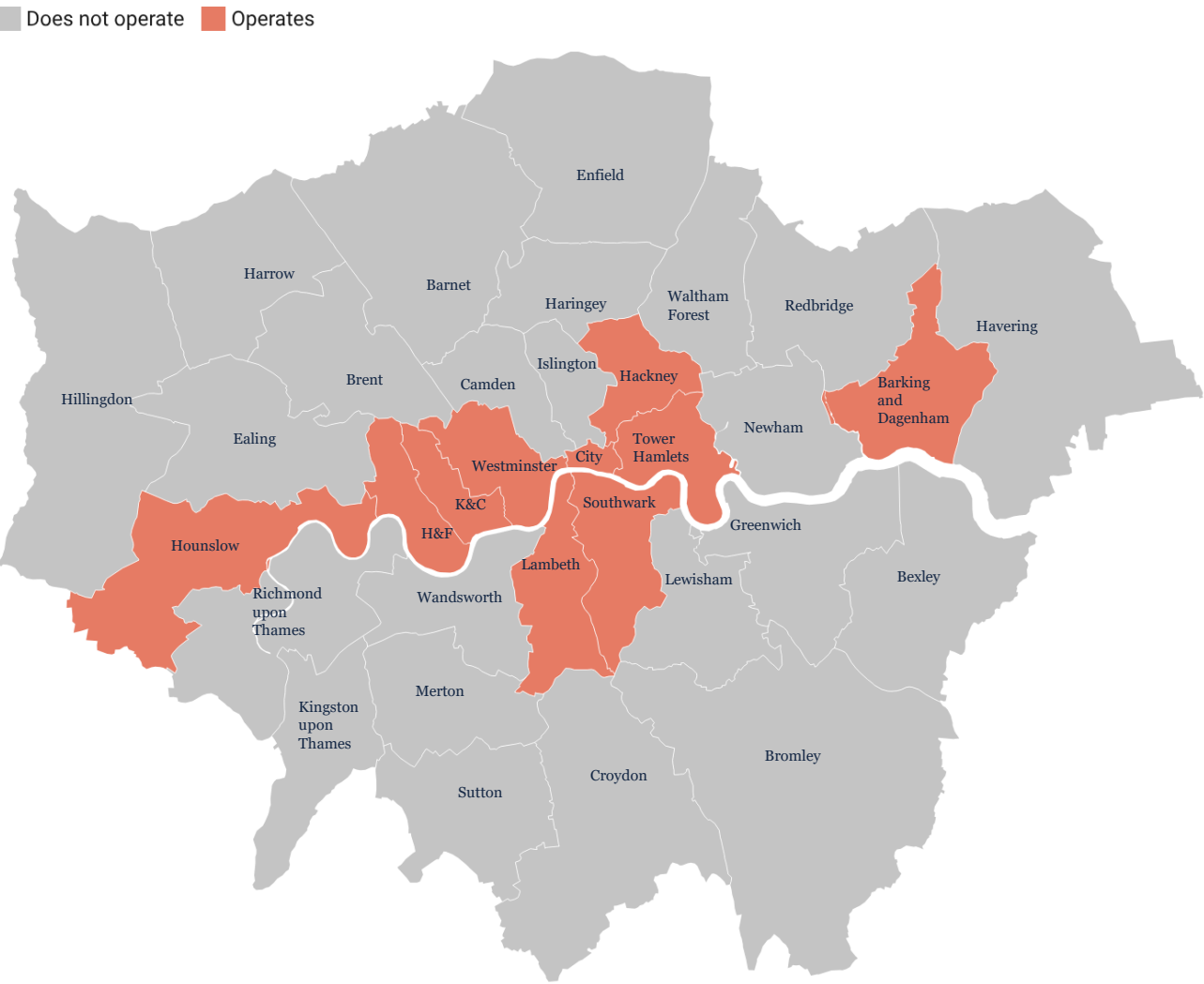


Source: Forest, [How It Works | Forest eBike Sharing in London](#), accessed 12 August 2026. Ealing Times, [Forest e-bikes launch across Ealing in latest deal](#), 31 July 2026. Map produced using Datawrapper.

Voi's operation is a fragmented patchwork from west to east London

Voi operates in ten London boroughs, including the City of London, fewer than Lime and Forest. These boroughs form a central band running across London from Hounslow in the west to parts of Barking and Dagenham in the east. However, this picture is fragmented with no connection between Barking and Dagenham and the other boroughs. In theory, this means users hiring bikes in Barking and Dagenham would only be able to use them to travel within selected areas in the borough.

Area where Voi operates



Source: Jaramillo, V., Aaradhi, A., Fujimoto, H., Nakamura, K. Information collected from the Voi official app, consulted on 5 August 2026. Additional data based on analysis of Borough websites and media reports. Map produced using Datawrapper. As of August 2026, Voi no longer has a formal agreement with Ealing, however Voi bikes continue to be available in the borough.

Bolt operates in three boroughs

Of the dockless e-bike companies in London, Bolt currently operates in the fewest boroughs. Bolt bikes are available for use in three central London boroughs: Hammersmith and Fulham, Kensington and Chelsea, and Westminster.

Area where Bolt operates



Source: Bolt, [Bolt expands e-bike fleet ahead of London transport strikes](#), 22 April 2026. Map produced using Datawrapper.

4 Challenges of dockless e-bikes

Overview

This section explores some of the commonly reported challenges associated with dockless e-bikes, including their contribution to street clutter, concerns about accessibility, and issues with enforcing parking regulations.

Source information

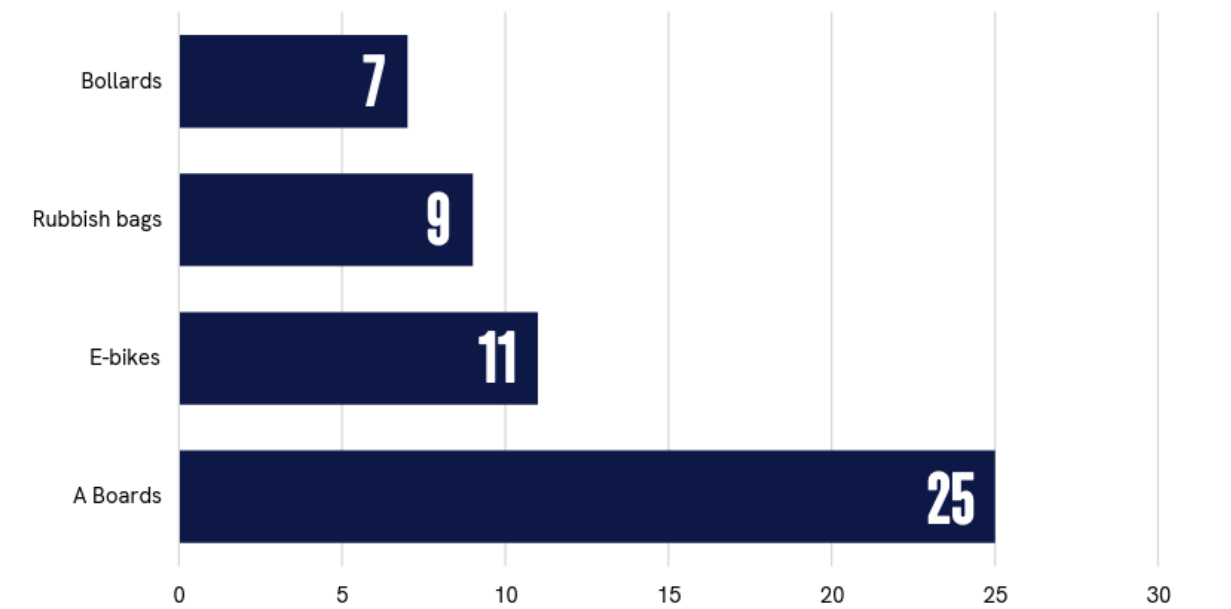
The data in this section comes from data collected by LSE researchers, Centre for London, Inclusion London, and the London Assembly.

E-bikes were a common type of street clutter in central London in 2023

Street clutter is anything on the pavements or highway which does not serve a useful or necessary function.¹ According to research by Centre for London, e-bikes were the second most common form of street clutter in its observational assessments of three central London streets in 2023, behind advertising boards (A boards).

Its report found that cluttered pavements can reduce accessibility, particularly for disabled people and those using mobility aids, and that almost half of identified street clutter had a moderate or severe impact on the walkability of pavements.

Types of street clutter in three central London locations, 2023



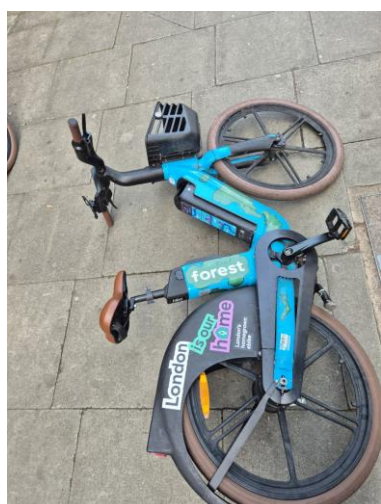
Source: Centre for London, [Reducing Street Clutter in Central London](#), 2023, p.21. Based on assessments of Goodge Street W1, Charing Cross Road WC2, and Belvedere Road SE1. Note: the data above is based on observational surveys conducted at one specific time for each location, rather than being an average figure over time.

¹ GLA, [Street Clutter \(1\)](#), 21 October 2012.

Reports suggest poorly parked bikes can negatively impact accessibility for pedestrians

As the use of e-bikes has expanded, concerns have been raised about the impact of poorly parked bikes on people who rely on clear and unobstructed pedestrian routes. For example, Deaf and Disabled People's Organisation Inclusion London has noted that e-bikes blocking pavements make it difficult for Disabled Londoners, such as those with visual impairments, mobility impairments and wheelchair users, to navigate street-space. The London Assembly Transport Committee heard at its meeting in September 2025 that e-bikes parked on pavements were reducing accessibility and mobility for pedestrians.

Examples of dockless e-bikes blocking or restricting pedestrian ways in London, 2026



Sources: Inclusion London, [TfL Equity in Motion plans welcomed](#), February 2024.

London Assembly, [Transport Committee meeting transcript – Panel Two](#), 25 September 2025

Image credits: Jaramillo, V., Aaradhi, A., Fujimoto, H., Nakamura, K. Photos taken from 28 April to 2 June 2026 in multiple areas of London.

Restrictions on dockless e-bike parking are not always adhered to

Dockless e-bike operators use GPS technology, parking controls and geofenced areas to encourage responsible parking. However, stakeholders have argued that these measures do not always prevent bikes from being parked in inappropriate locations or clustering around busy pedestrian areas.

Some boroughs have created specific parking bays to attempt to reduce pavement clutter. These can be physical bays which are marked on the street, or virtual spaces which are identified as a parking area in the app.

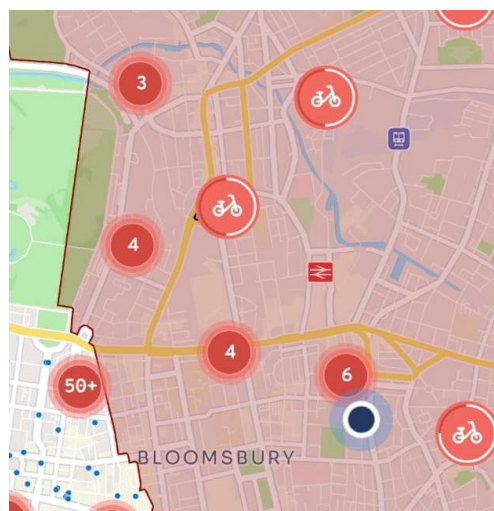
TfL has developed a [dockless bike share code of practice](#) in collaboration with London's boroughs and other key stakeholders for potential operators of dockless cycle hire schemes.

In January 2026, TfL also published a new [Highway enforcement and prosecution policy](#), which it undertakes on the roads it is responsible for.

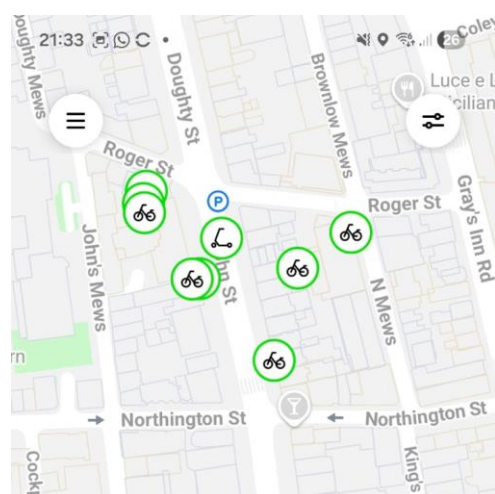
Dedicated parking zone, Southwark, July 2026



Screenshot from a dockless e-bike app showing bikes parked in prohibited areas, July 2026



Screenshot from a dockless e-bike app showing bikes dispersed around a virtual parking point, July 2026



Sources: London Assembly, [Transport Committee meeting transcript – Panel Two](#), 25 September 2025. Transport for London, [Dockless cycle hire](#) (accessed 3 September 2026).

Image credit: Jaramillo, V., Aaradhi, A., Fujimoto, H., Nakamura, K., screenshots taken from Lime and Voi apps, July 2026. Image credit: Becka Storer.

5 Regulation of dockless e-bikes in London

Overview

This section covers the operation of dockless e-bikes in London, including an overview of historical mechanisms, the local agreements in place in different boroughs, and Mayoral and London Assembly views on the licensing and operation of dockless e-bikes in the capital.

Source information

The information in this section is drawn from legislation, local authority enforcement policies, TfL guidance, and Mayoral and London Assembly sources.

The operation of dockless e-bikes in London has evolved over time

Dockless e-bikes in London operate in a largely unregulated market. Currently, the operation of dockless e-bikes is the responsibility of boroughs, who are the Highway Authority for most roads in their area. Dockless e-bike operators enter into agreements with boroughs regarding the rules around market entry, parking and safety standards. TfL is responsible for dockless e-bikes on the Transport for London Road Network, which makes up approximately five per cent of London’s roads.

The nature of dockless e-bike operation in London has evolved over time, from a system of light-touch control following their introduction in 2018 until around 2022. Since then, different forms of e-bike operation have emerged in different boroughs.

TfL’s [dockless bike share code of practice](#), updated in 2018, sets expectations for the operation of dockless e-bikes in London.

In April 2026, the [English Devolution and Community Empowerment Act](#) received Royal Assent and became law. Under this new legislation, TfL will be the licensing authority for dockless e-bikes. This means that operators will require a licence from TfL, which will be able to set standards and conditions for the services. TfL and boroughs will have a duty to cooperate to ensure parking provision for licensed dockless e-bikes. These powers will not come into force until the Government publishes secondary legislation, which is expected in the next 12 months.



Source: Jaramillo, V., Aaradhi, A., Fujimoto, H., Nakamura, K. Infographic created using information from different sources. An overview of the operation of dockless e-bikes in London over time can be found at BBC, [‘There’s a solution for e-bike parking chaos - but it's not problem-free’](#), 2026.

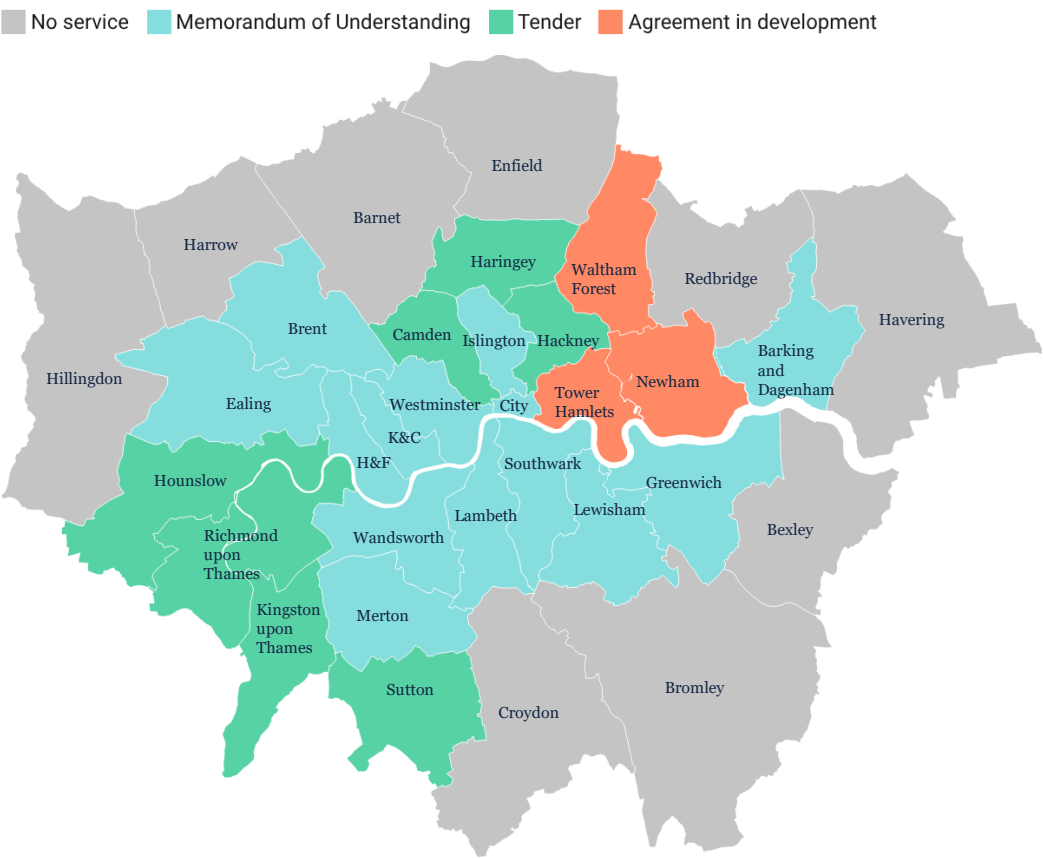
London is currently a fragmented patchwork of local agreements for dockless e-bikes

Local authorities in London operate different types of local agreements for dockless e-bikes. This patchwork approach will be phased out once TfL is the licensing authority for dockless e-bikes across London.

Currently, Inner London boroughs and those to the east and west tend to control the operation of e-bikes through Memorandums of Understanding (MoUs). These are agreements with boroughs outlining each operator’s responsibilities and obligations.

Seven boroughs, including four Outer London boroughs in the southwest and the neighbouring north London boroughs of Camden, Hackney, and Haringey use tenders. These invite e-bike operators to submit competitive proposals to operate in the borough and can include details such as fleet size, service quality, pricing and fee structures, sustainability measures, and operational plans.

Types of local agreements in place for the operation of dockless e-bike schemes in London



Sources: Jaramillo, V., Aaradhi, A., Fujimoto, H., Nakamura, K. Information collected from boroughs’ official websites, council meeting minutes and formal documents, and media reports. Map produced using Datawrapper.

London Assembly and Mayoral activity

On 7 November 2024, the London Assembly unanimously passed a motion calling for TfL and other strategic transport authorities to be given the power to regulate micromobility operators, such as dockless e-bike companies. It stated:

“ Neither Transport for London nor London boroughs have the legal powers to manage these services. Instead, boroughs must rely on the goodwill of operators to adhere to the terms of agreements. In several boroughs, e-bikes are operated and deployed without the local authority’s consent. ”

The [English Devolution and Community Empowerment Act](#), which makes provision for TfL to regulate dockless e-bikes, gained Royal Assent in April 2026. Since then, the Mayor has made several statements about his ambitions in this area. On 1 June 2026, he stated:

“ While it would be premature to go into the detail on this before secondary legislation is in place, my ambition is for TfL to use its new powers to support sustained cycling growth whilst driving up consistent and high standards for rental e-bike schemes across London replacing the existing patchwork and borough-by-borough approach. ”

Source: London Assembly, [Allow TfL to regulate e-Bikes and scooters](#), 7 November 2024.
GLA, [English Devolution and Community Empowerment Act](#), 1 June 2026.

Other formats and languages

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Chinese

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Vietnamese

Nếu ông (bà) muốn nội dung văn bản này được dịch sang tiếng Việt, xin vui lòng liên hệ với chúng tôi bằng điện thoại, thư hoặc thư điện tử theo địa chỉ ở trên.

Greek

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Hindi

यदि आपको इस दस्तावेज का सारांश अपनी भाषा में चाहिए तो उपर दिये हुए नंबर पर फोन करें या उपर दिये गये डाक पते या ई मेल पते पर हम से संपर्क करें।

Bengali

আপনি যদি এই দপিলের একটা সারাংশ নিজের ভাষায় পেতে চান, তাহলে দয়া করে ফো করবেন অথবা উল্লেখিত ডাক ঠিকানায় বা ই-মেইল ঠিকানায় আমাদের সাথে যোগাযোগ করবেন।

Urdu

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Arabic

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Gujarati

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