

The E-Scooter Sharing Market in Georgia

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01. Introduction & Key Findings

Shared e-scooters have become a significant part of urban transport in Georgia's large cities. Tbilisi was the first market where shared e-scooters appeared; the sector has since expanded to Batumi and other cities. The Georgian startup Scroll pioneered the service, and international operators later entered the market: Bolt, Jet, Bird (via Scroll) and Yandex Go, along with the Batumi-focused toGO.

This document consolidates and verifies existing data against updated sources (February–May 2026) and official company statements. Prices are given in Georgian lari (ლ).

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active operators in the market
(Bolt, Scroll, Jet, Bird, toGO, Yandex Go)

0.22 ლ

lowest per-minute rate (Yandex Go, with subscription)

0 ლ

minimum unlock fee (Yandex Go, free 10-minute reservation)

2019

birth of the market: Scroll's launch in Tbilisi

Key finding in brief

The market is small but fast-growing and competitive. Yandex Go and Bolt lead on price (0.28–0.29 ლ/min), while Scroll/Bird is more expensive (0.55 ლ/min) but emphasizes service quality and local integration. Subscriptions and various packages significantly reduce costs for frequent riders.

02. Market Overview & Development

Georgia's e-scooter sharing market took shape in under six years: it grew from a single local startup into a multi-operator, competitive ecosystem. The main stages of its development, in chronological order, are as follows:

2019 Scroll: the market pioneer

The Georgian micromobility startup launched. By 2019 the company owned about 2,500 scooters across Tbilisi, Batumi and Rustavi, with planned expansion to Kutaisi and other cities.

2024 Bolt: a European operator enters

Europe's largest scooter operator, Bolt, began operating in Tbilisi in August 2024 and quickly established itself with competitive pricing.

2025 Yandex Go: a multi-service platform

On 18 April 2025, Yandex Go scooters appeared on Tbilisi's streets; the service initially covered Saburtalo, Vake-Vera and parts of Chughureti, Marjanishvili and Mtatsminda.

2026 A mature, competitive market

Today up to seven brands operate simultaneously in Tbilisi; in Batumi toGO leads, with Scroll/Bird and Jet operating alongside. Scroll is rolling out second-generation scooters.

Local vs. international

Scroll is the home-grown brand that shaped the early market; the Georgian operator Kicky also ran in the past, but no current information about it is available and the service appears to be discontinued. Bolt (Estonia), Jet (Kazakhstan) and Yandex Go entered later but expanded rapidly across the South Caucasus with aggressive pricing and subscriptions.

Common characteristics

The market's current state shares several common features: GPS-controlled parking and "green-zone" bonuses; speed limits (20–25 km/h, 15 km/h on the Batumi seafront); the ability to reserve several scooters at once; and subscription-based monetization that waives the unlock fee or reduces the per-minute rate.

03. Detailed Operator Profiles

Bolt Tbilisi · 2024

Price (Tbilisi): Start 0.35 ₾ Min 0.29 ₾ Unlock free Pause 0.10 ₾/min

The "Plus" subscription is 3.90 ₾/month (waives the start fee). On weekday mornings before 11:00 the rate drops to 0.25 ₾/min. The company emphasizes safety (speed up to 20 km/h) and uses GPS-controlled parking.

Scroll Bird partner · 2019

Price (Tbilisi): Start 1 ₾ Min 0.55 ₾ Deposit ≥20 ₾

A Georgian micromobility startup (2019). Qari electric mopeds are also available through the same app. Free-unlock promotions run periodically. Scroll is testing a second-generation fleet: swappable batteries, improved LED lighting, hydraulic suspension and an integrated frame. It has also partnered with Bird.

Jet Tbilisi & Batumi

Price (Tbilisi): Start 0.35 ₾ Min 0.35 ₾ Hour 18 ₾ Sub. 2.9 ₾/mo

Price (Batumi): Start 1 ₾ Min 0.30 ₾ Hour 16 ₾ Daily 22.9 ₾

A Kazakh operator active across Central Asia, the South Caucasus and Latin America. Its global fleet exceeds 62,000 vehicles, of which about 12% are in the South Caucasus. Features: multi-rent (up to 5 scooters), a free 10-minute reservation, pause and bonus zones.

Bird Scroll's fleet

Price: Start 1 ₾ Min 0.55 ₾ Min fare 3 ₾

A global micromobility company that operates in Georgia through its partner Scroll. Through the Bird app, over one million Tbilisi residents can access Scroll's scooters and Qari's mopeds. Pricing matches Scroll's, since it uses the same fleet.

toGO Batumi leader

Price (Batumi): Activation 1 ₾ Min from 0.30 ₾ Hour 20 ₾

Mainly active in Batumi and along the Black Sea coast (scooters also appear in Tbilisi). Topping up 25 ₾ adds 30 bonus minutes, and 50 ₾ adds 65 bonus minutes. A 5 ₾ hold is placed on the card and refunded after the ride. Speed limit: 15 km/h on the seafront boulevard and 25 km/h elsewhere.

Yandex Go Tbilisi · 2025

Price (Tbilisi): Unlock free Min 0.28 ₾ Sub. 3.49 ₾/mo → 0.22 ₾/min

A multi-service platform: users switch between taxi, delivery and scooters in a single app. After reserving, the first 10 minutes to reach the scooter are free; 15/50/100-minute packages are available. Minimum age 18; up to 3 scooters at once. Geofencing automatically reduces speed in congested zones.

Morning discount: a regular offer

Both Bolt and Jet (Tbilisi) reduce the per-minute rate to 0.25 ₾ during the morning peak (Mon–Thu before 11:00); this strategy supports workday commutes.

04. Tariff Comparison

Service	Start / Unlock	Per-minute rate	Hour / Pass	Note
Bolt (Tbilisi)	0.35 ₾ start; unlock free	0.29 ₾/min; 0.25 ₾/min mornings	—	Pause 0.10 ₾/min; “Plus” 3.90 ₾/mo waives start
Scroll (Bird)	1 ₾ unlock	0.55 ₾/min	—	Deposit ≥20 ₾; periodic free-unlock
Jet (Tbilisi)	0.35 ₾ start	0.35 ₾/min; 0.25 ₾/min mornings	18 ₾/hr	Sub. 2.9 ₾/mo waives start
Jet (Batumi)	1 ₾ start	0.30 ₾/min	16 ₾/hr	Daily pass 22.9 ₾ (unlimited, ≤40 min/ride); sub. 8 ₾/mo
toGO (Batumi)	1 ₾ activation	from 0.30 ₾/min	20 ₾/hr	Top-up bonus minutes; 5 ₾ card hold
Bird (via Scroll)	1 ₾ start	0.55 ₾/min	min 3 ₾	Scroll’s fleet; same deposit
Yandex Go (Tbilisi)	unlock free; 10 min free reservation	0.28 ₾/min; 0.22 ₾/min sub.	—	Sub. 3.49 ₾/mo; packages 15/50/100 min

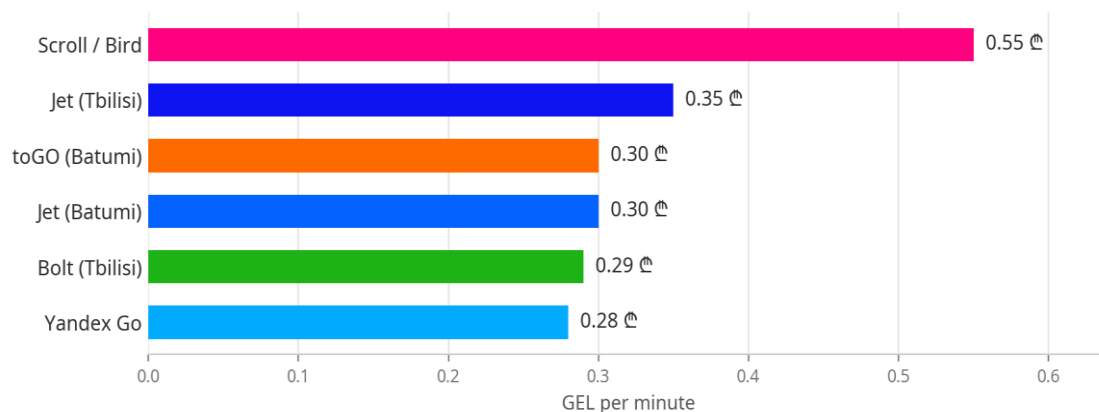


Figure 1. Standard per-minute rate by operator (GEL/minute). A subscription or morning discount reduces the rate further.

Who is it cheapest for?

Short, one-off rides: Yandex Go (free unlock) or Bolt. Frequent riders: Yandex Go’s 3.49 ₾ subscription or a Jet/Bolt subscription. Long rides: Jet’s daily pass (Batumi) or hourly rate.

05. Fleet, Coverage & Competition

Operator	Estimated fleet size and notes	Source
Scroll	~2,500 scooters in Georgia (Tbilisi, Batumi, Rustavi), 2019. It has since expanded and is rolling out a new generation, though updated figures are not published.	CBW (2019); Scroll blog (2025)
Jet	Global fleet of 62,000+ units, of which ~12% are in the South Caucasus, i.e. about 7,400 units in the region (not Georgia alone). City-level figures are not disclosed.	Zag Daily (2025)
Bolt	No public fleet figure for Georgia. Europe’s largest operator; operating in Tbilisi since August 2024.	Forbes Georgia (2024)
toGO	Official fleet unknown; concentrated in Batumi; the main option on the boulevard.	Madloba guide (2026)

Operator	Estimated fleet size and notes	Source
Bird	Uses Scroll's fleet, so its figures match Scroll's.	Bird blog (2021)
Yandex Go	No official figure. Launch: April 2025; covers central Tbilisi districts.	Georgia Online & Kommersant (2025)

Competition & segments

Two price poles emerge in the market: low-cost operators (Bolt, Jet, Yandex Go) compete aggressively with low per-minute prices and subscriptions, while Scroll/Bird is more expensive but emphasizes service quality and local integration. Geographically, most operators are in Tbilisi, while toGO leads in Batumi. Below is which segment each operator best fits.

Operator	Target segment	Why
Yandex Go	Budget-conscious, frequent riders	Lowest per-minute price, free unlock and a single app for taxi and delivery.
Bolt	Everyday, citywide commuting	Low price, a cheap subscription and a morning discount for work commutes.
Jet	Long and group rides	Hourly and daily passes, renting up to 5 scooters at once.
Scroll / Bird	Quality- and comfort-focused	New-generation fleet and local integration; higher price.
toGO	Batumi and tourist trips	Seafront boulevard coverage and bonus minutes on top-ups.

06. Conclusions

Below are the study's main findings on market size, prices, competition and future trends.

Key conclusions

- **Market size:** The market is small but growing. In 2019 Scroll owned about 2,500 scooters. Jet claims a large regional fleet (about 7,400 units in the South Caucasus). The presence of several operators suggests a few thousand scooters in Tbilisi and a few hundred in Batumi.
- **Prices:** The per-minute rate ranges from 0.28 ₾ (Yandex Go) to 0.55 ₾ (Scroll/Bird). The unlock fee ranges from 0 ₾ (Yandex Go) to 1 ₾. Subscriptions significantly reduce or entirely waive the unlock fee.
- **Competition:** Low-cost operators (Bolt and Jet) compete directly with Scroll/Bird through lower prices and subscriptions, while toGO serves a narrower, Batumi-focused segment.
- **Future outlook:** The sector is growing alongside rising demand for urban mobility. Investment in next-generation scooters and integration with other services (Bird, Qari Electric) create a strong growth outlook. Sustainable growth will require better cycling infrastructure and integration into city transport.

Methodological note. This document is based on publicly available sources and company statements (February–May 2026). Prices may change due to promotions, seasonality and municipal regulations; always verify the current tariff in the relevant app.

07. Bibliography

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