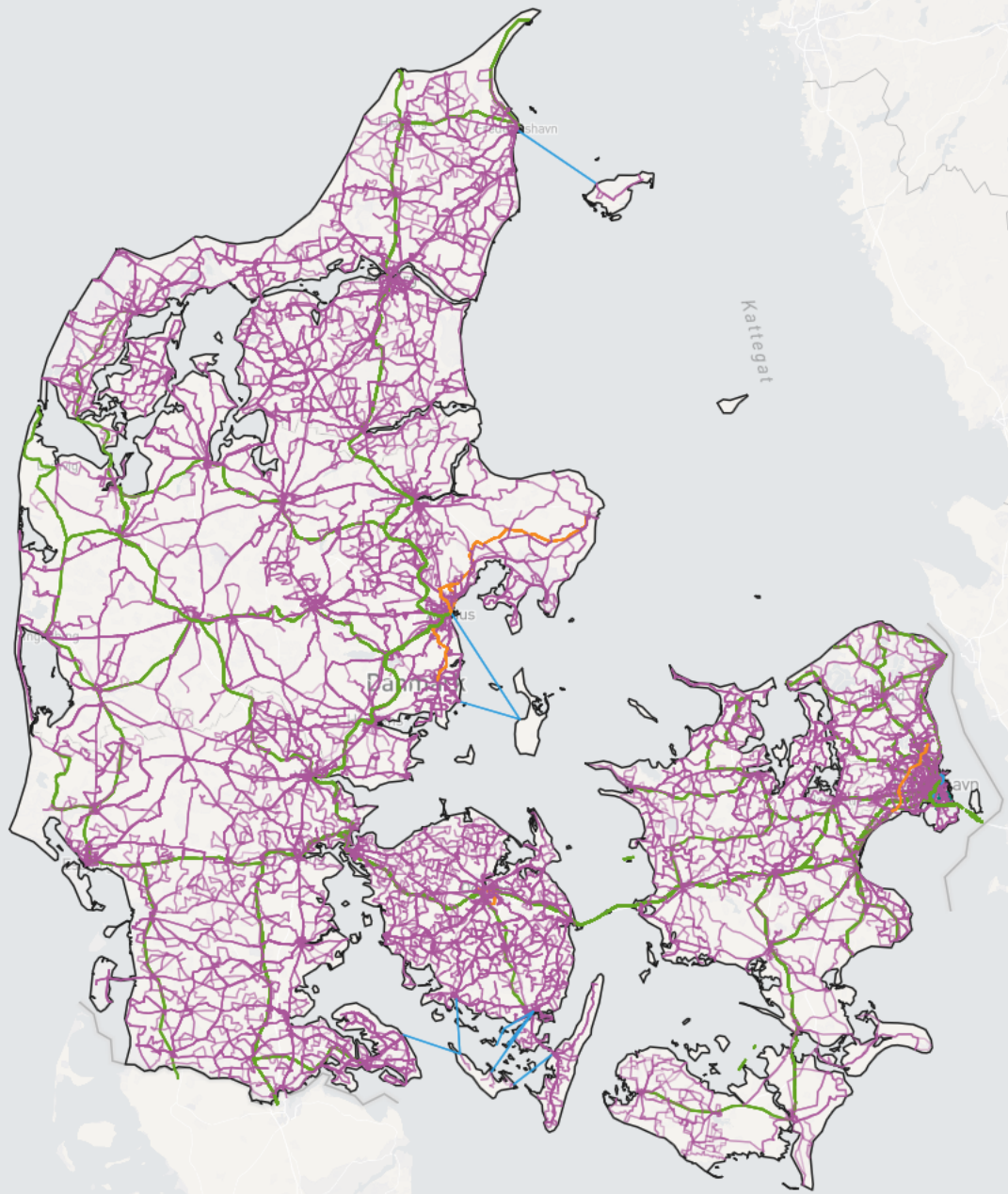


Density First: What Denmark's Rural AV Ambitions Actually Depend On?

Laura Herzig // Partner, Beta Mobility

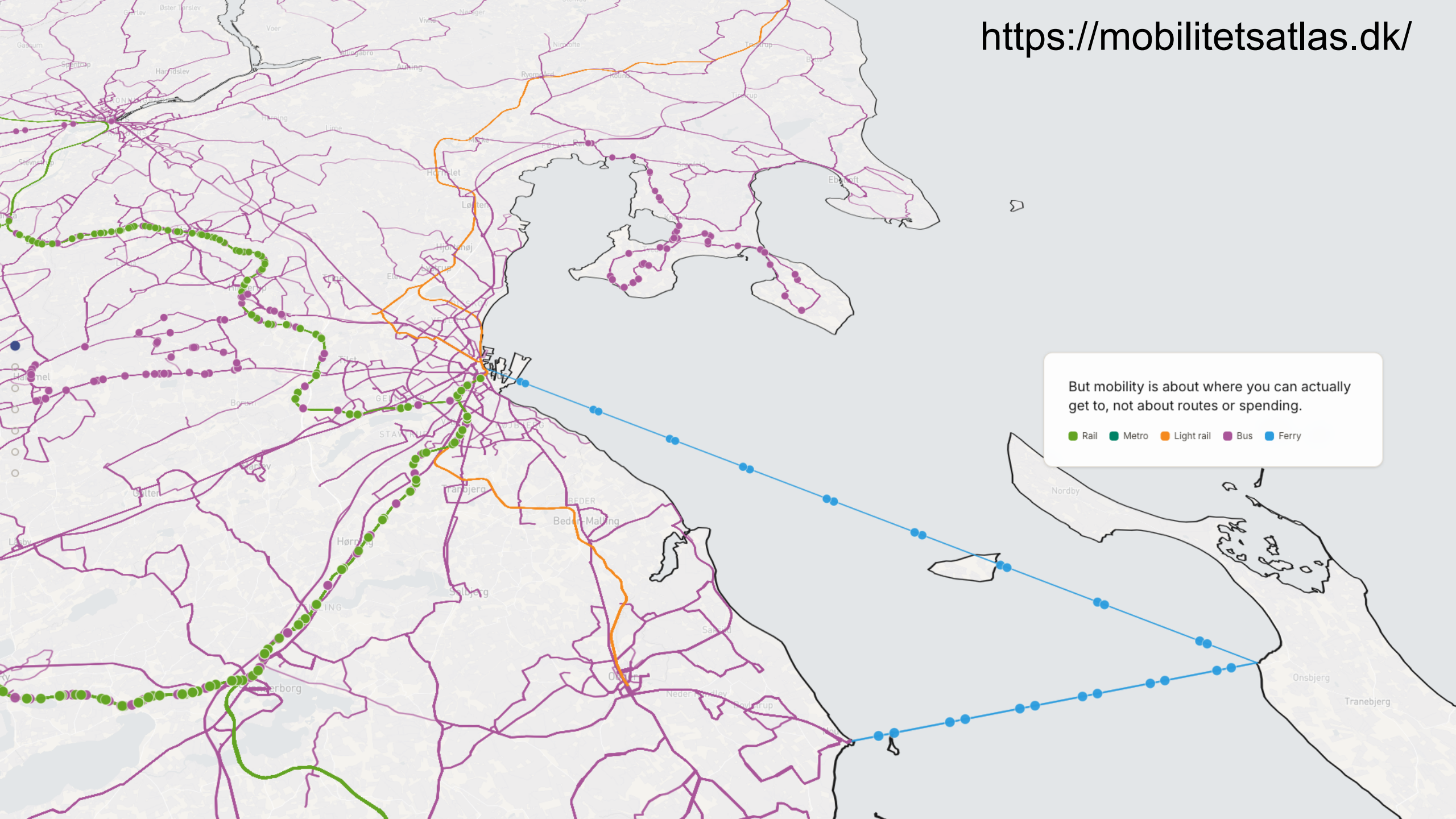
https://mobilitetsatlas.dk/



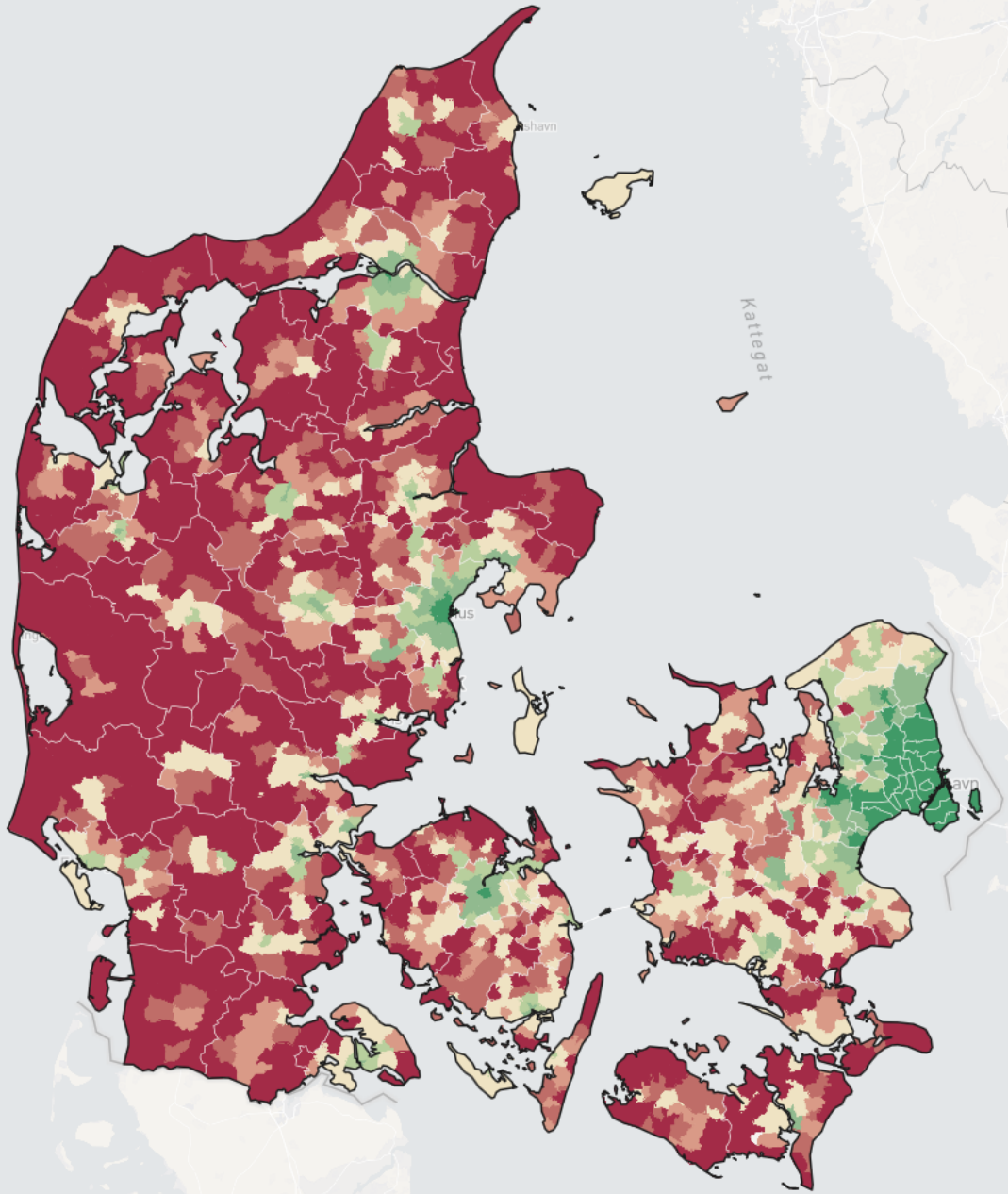
Denmark is a country built on a public-transport backbone that ties the country, the regions and the cities together. **36,204 stops** on **1,574 routes** across **20 operators**.

Rail Metro Light rail Bus Ferry

https://mobilitetsatlas.dk/



https://mobilitetsatlas.dk/

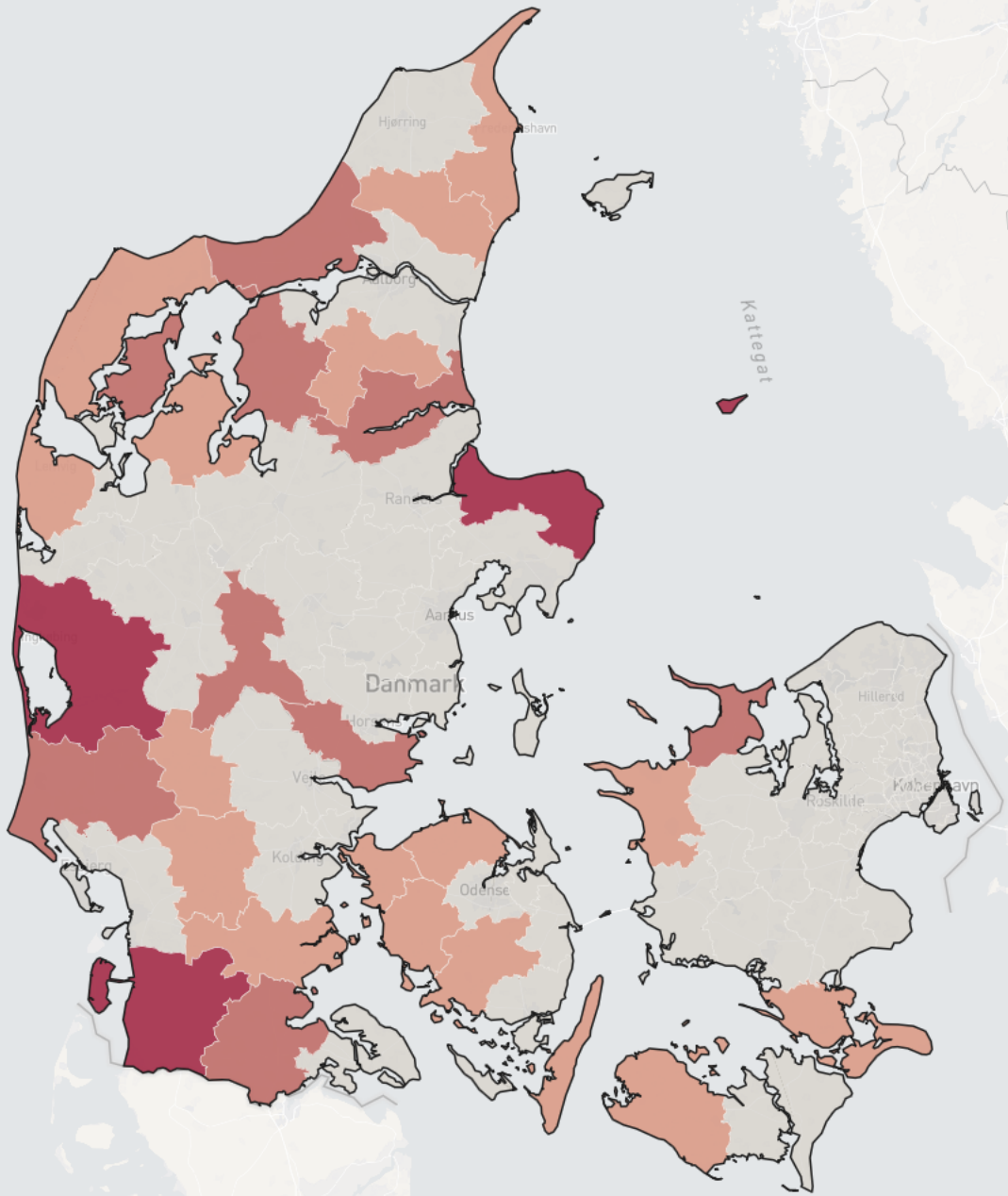


So we built one comparable mobility grade, showing how freely you can move, with and without a car.

THE GRADE, A TO G

- A 70-100
  Walking and public transport cover roughly as much of everyday life as the car.
- B 55-70
  Walking and public transport cover most of everyday life, almost on a par with the car.
- C 45-55
  Walking and public transport cover a large part of everyday life, helped by short distances.
- D 30-45
  Walking and public transport cover part of everyday life, but far less than the car reaches.
- E 22-30
  Walking and public transport cover only a smaller part of everyday life; the car reaches clearly further.
- F 15-22
  Walking and public transport cover few of the journeys of everyday life; the car is effectively necessary.
- G 0-15
  Walking and public transport cover almost nothing of everyday life; the car is the only real option.

https://mobilitetsatlas.dk/



1.42 million Danes live somewhere the car is not a choice. **29 of 98 municipalities** are graded E, F or G.

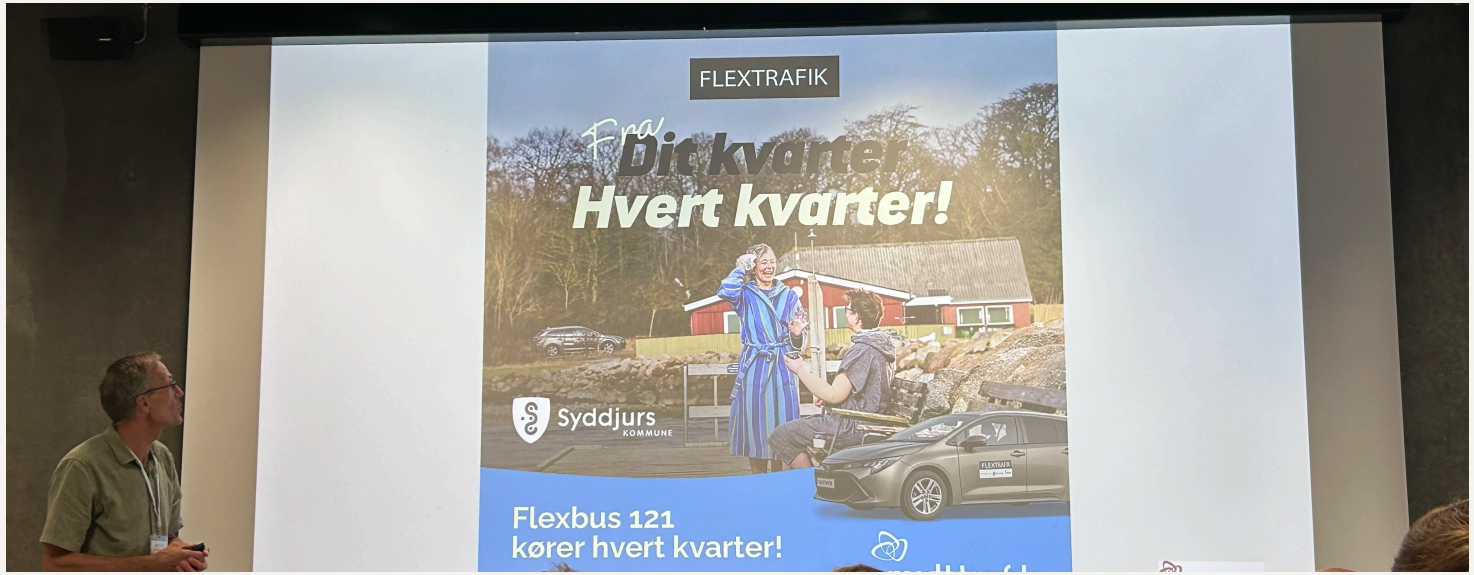
In the lowest bands, walking and public transport cover only a small part of everyday life, and the car is effectively necessary.

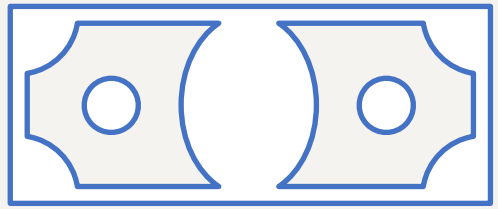
Why is this problematic?

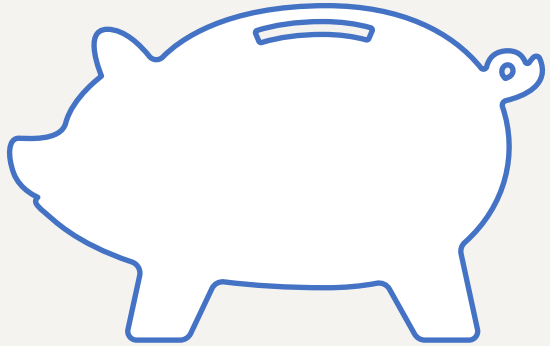

SCANIA
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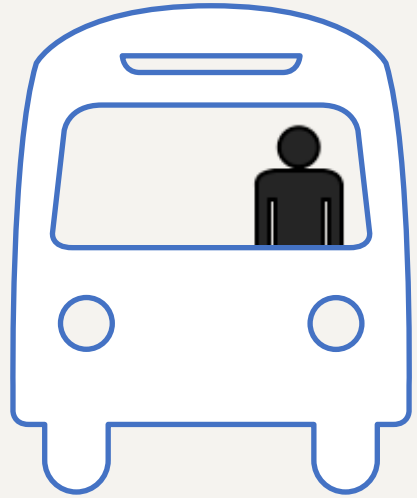

Nærbus – Fra pilot til drift
Rune Coermann Mathiesen


Bus på bestilling
Trafikdage 2026
NT


FLEXTRAFIK
Fra Dit kvarter
Hvert kvarter!
Syddjurs KOMMUNE
Flexbus 121
kører hvert kvarter!







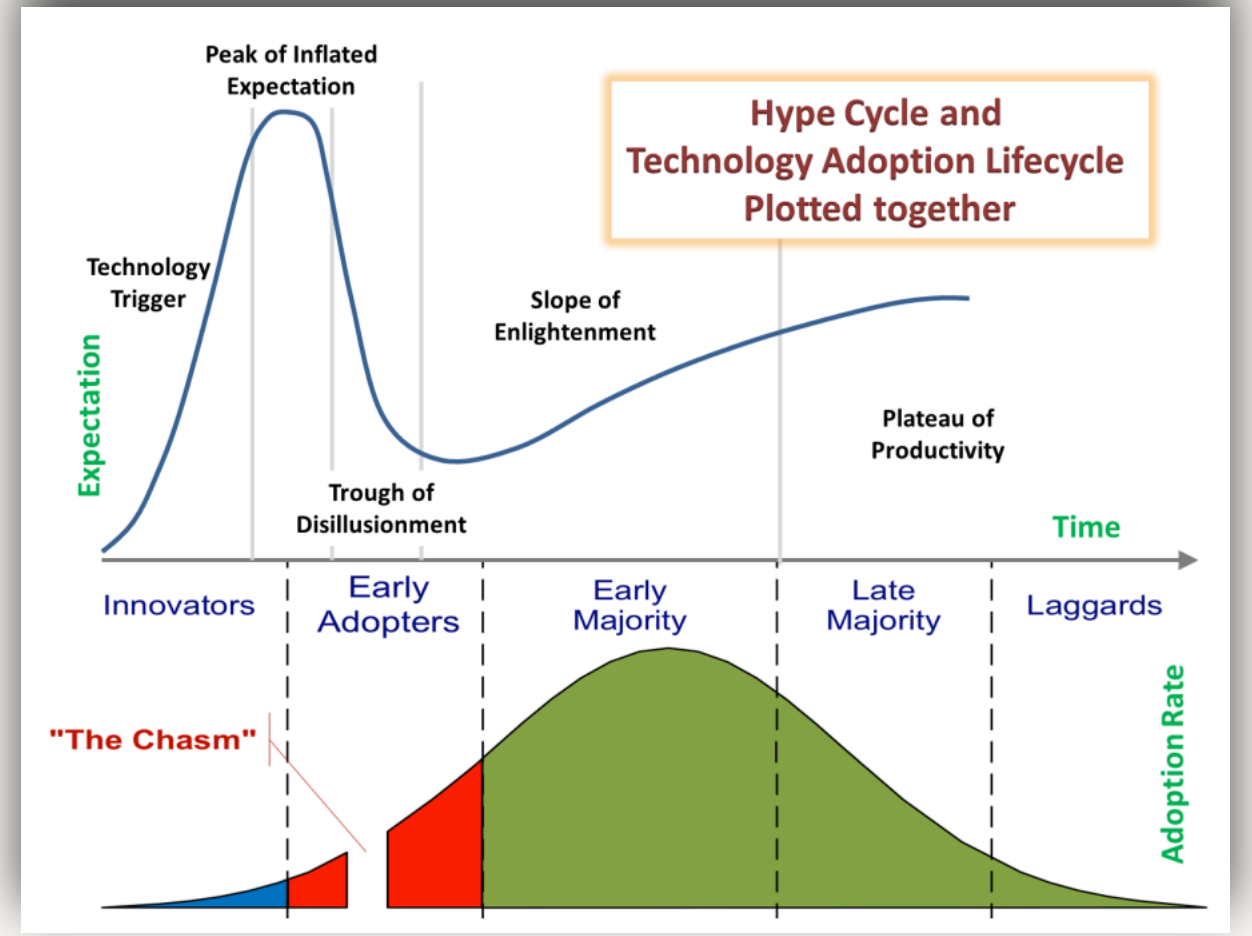


We are still at a very early deployment stage

We are still talking **< 10.000 deployed robotaxi/ roboshuttles worldwide**:

- Waymo runs roughly 3,000–3,500 vehicles
- Baidu's fleet is in the same range
- Pony.ai is around 1,700
- + some minor deployments

Robotaxi fleets are still small in absolute terms, but are growing at rapid pace. Predictions for China are in the hundreds thousands by 2030.



Source: Gartner Hype Curve & Udayan Banerjee



Hulton-Deutsch Collection/Corbis via Getty Images)

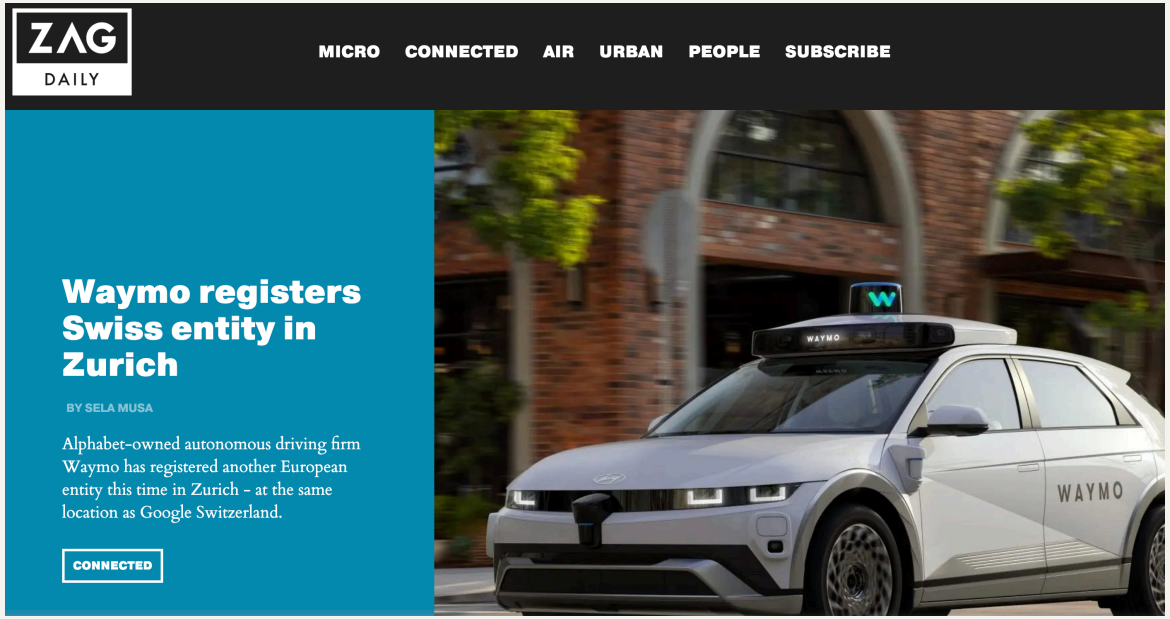


WAYMO




Ben Loewenstein • 2.
Head of Policy and Governme ...
15 t • Redigert •
Knytt kontakt
Servus München!
A proud day for the team as we announce that ...mer
Vis oversettelse
WAYMO
Waymo in Munich
1 588
46
25


Hello London!
WAYMO


ZAG DAILY
MICRO CONNECTED AIR URBAN PEOPLE SUBSCRIBE
Waymo registers Swiss entity in Zurich
BY SELA MUSA
Alphabet-owned autonomous driving firm Waymo has registered another European entity this time in Zurich – at the same location as Google Switzerland.
CONNECTED
WAYMO

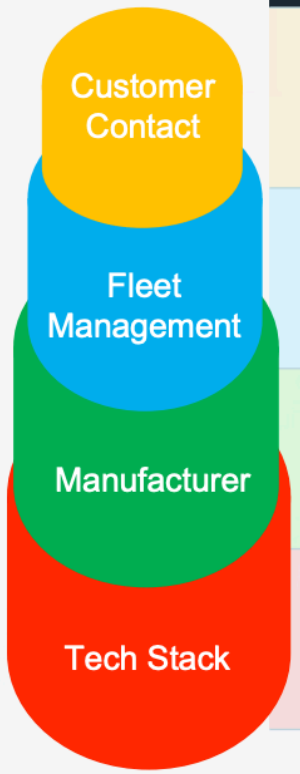

B2C
B2G
B2G

European deployments: an array of partnerships across the ecosystem

UrbanPlaces Lab

Privately-led projects: mainly ride-hailing, so-called 'robotaxi'

Public-transport-led projects



London Waymo	London Uber	Munich Uber	DE + UK Lyft	Zagreb Verne	Madrid Uber	Drôme (FR) beti	Furttal (CH) iamo	Oslo Ruter	Hamburg Hamburg
Waymo	Uber	Uber	lyft	verne	Uber	beti	ioki	Ruter#	MOIA
moove	Uber	Uber	lyft, Odysse	verne	avomo	beti	STL · Eurobus	Ruter# holo	HOCHBAHN
Jaguar	Opel, Stellantis	TBC likely Stellantis	apollo	BAIC Motor	WeRide	Renault	Nissan	MOIA	MOIA
Waymo	Wayve	momenta	apollo	pony.ai	WeRide	WeRide	WeRide	mobileye	mobileye

European value creation sits mainly in platform & operations — vehicle & AV software predominantly from China/USA (below). Hamburg/MOIA (VW) is the only vertically integrated EU solution. Excerpt, not exhaustive. Source: Urban Places Lab research 2026 (company information from Uber, Lyft, Waymo, WeRide, Pony.ai, MOIA).

23 June 2026

Source: Analysis by Neckermann Strategic Advisors

But in order to achieve that we need to **create** a market that is attractive.






DISRUPTION
What
How
Who



Difficult, complex but crucial measures
Public goal alignment, procurement, market structures, private/public responsibilities

Exciting tangible stuff
Wheels on the ground
Testing new vehicles and routes

beta



So when can we expect a strong BC for rural deployments?

Mobility is a coordination problem


beta
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