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New Mobility Overview

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Feb, 2019

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The “Triple Disruption”

Autonomous

On-demand

EVs

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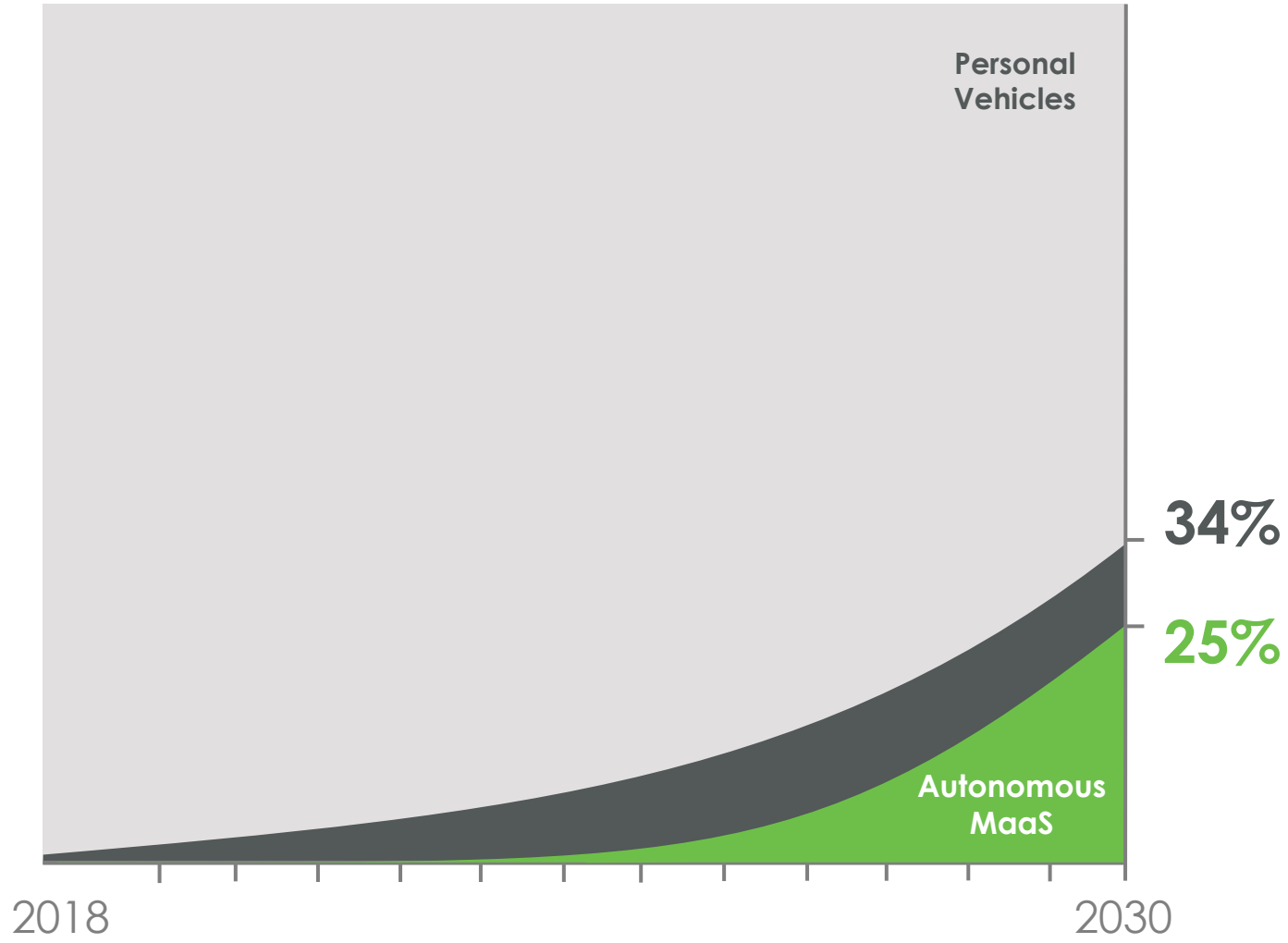
Mobility services gain usage

The growth happens with autonomous vehicles



Source: Expert Interviews; PwC Autofacts; Strategy & Analytics—The 2017 PwC's Strategy & Digital Auto Report.

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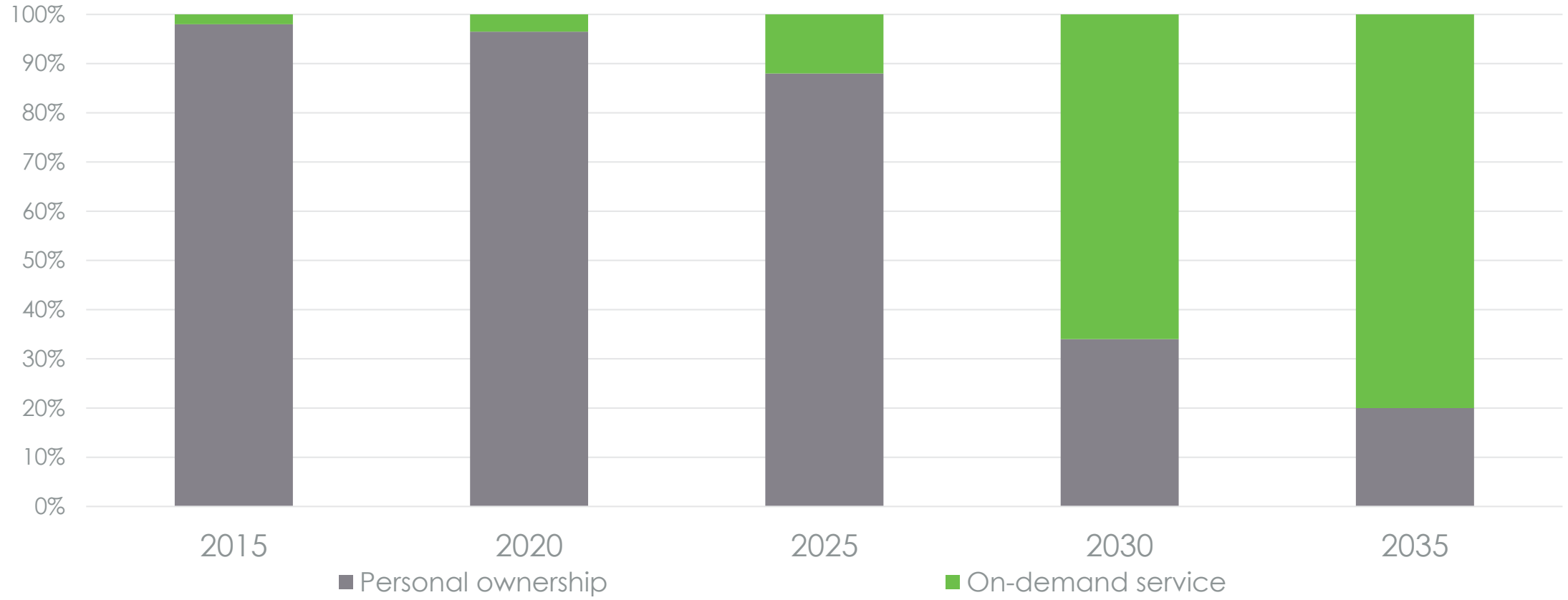
Mobility services gain vehicles

Forecast of new vehicle sales distribution in urban areas in the United States



Source: Deloitte University Press, The future of mobility: What's next?, 2017 Issue 20

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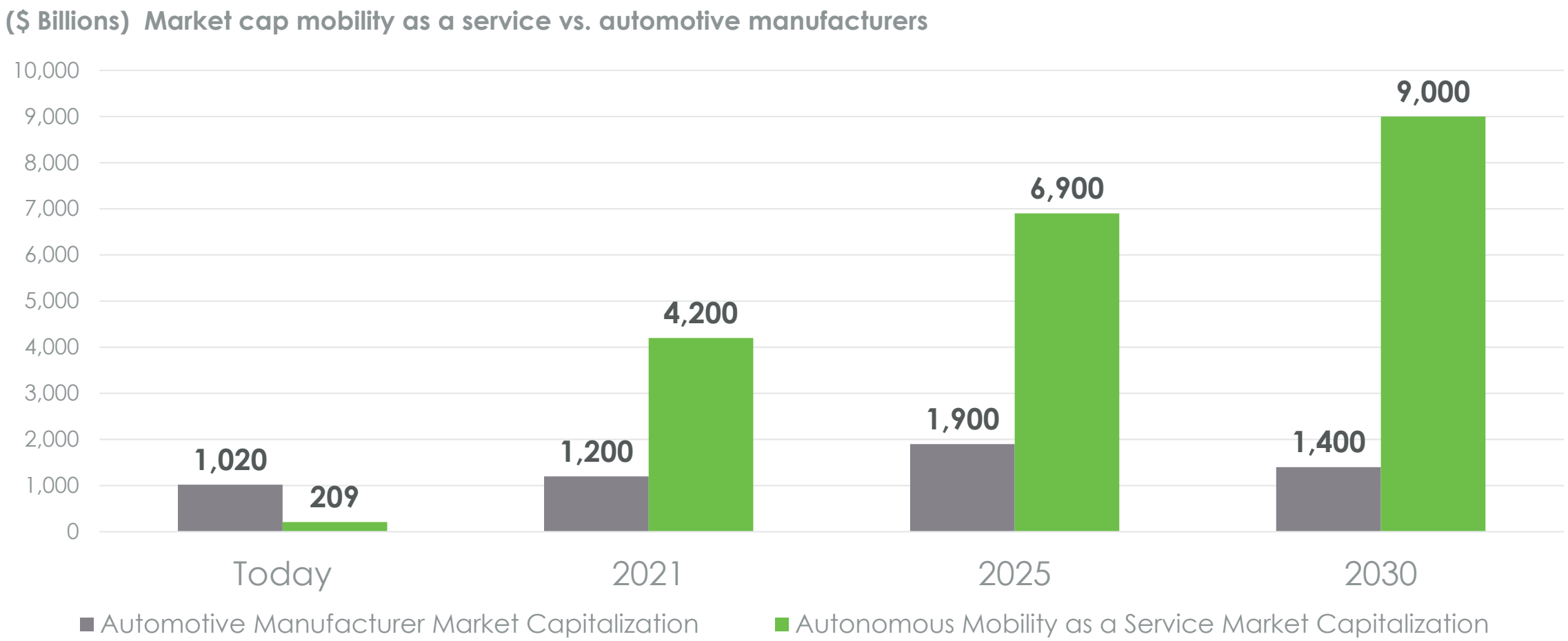
Mobility service providers gain value



Source: ARK Investment Management LLC | ark-invest.com

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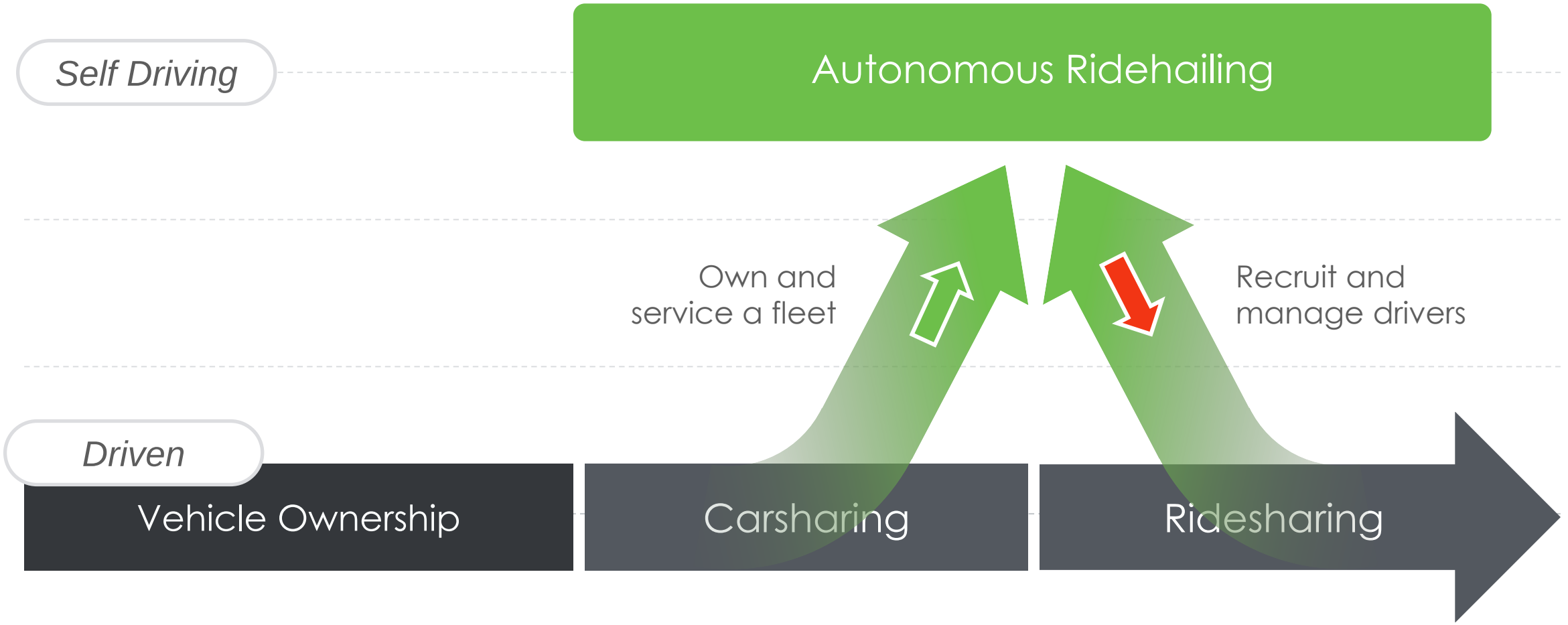
Mobility as a service evolution



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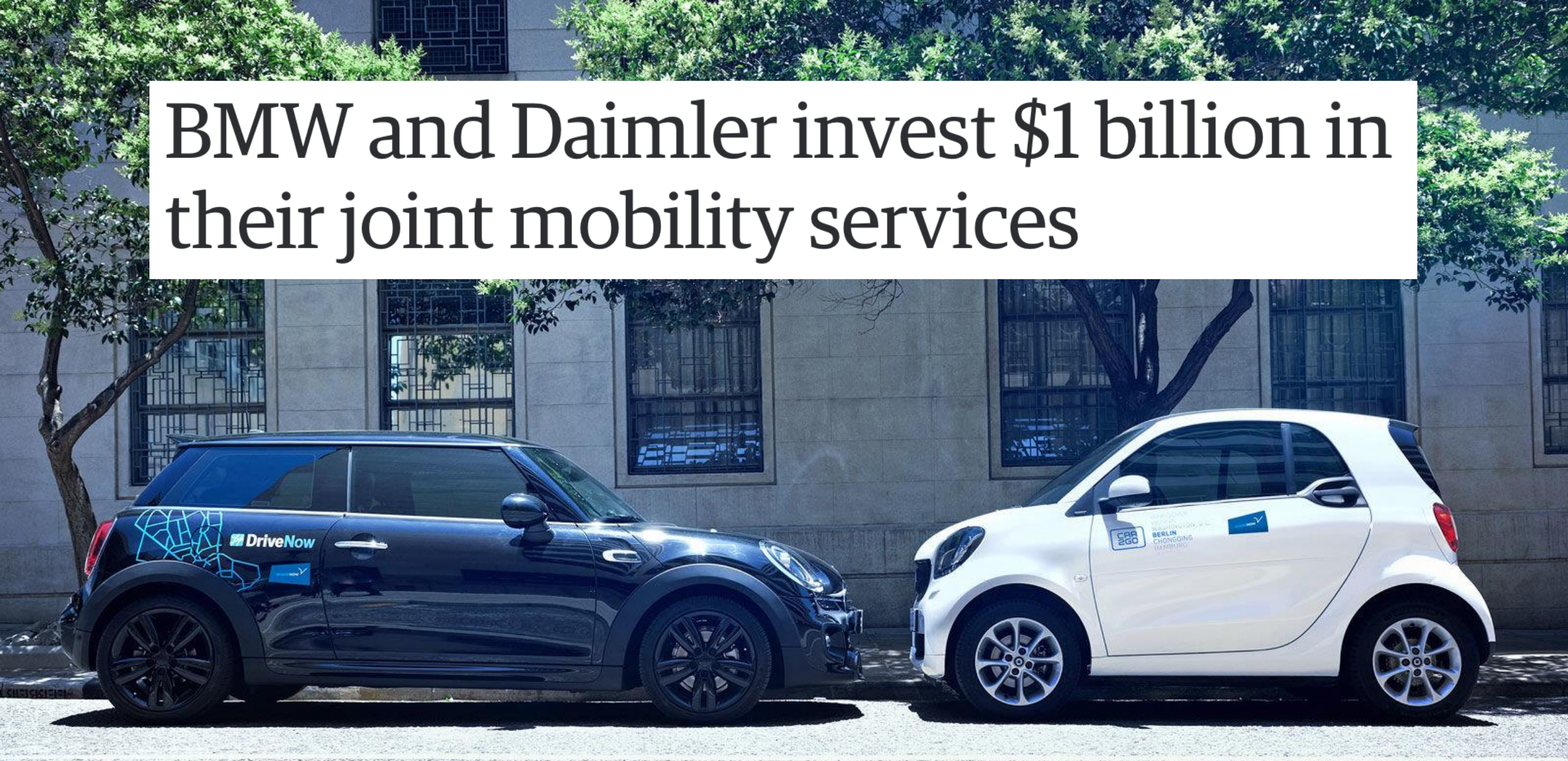
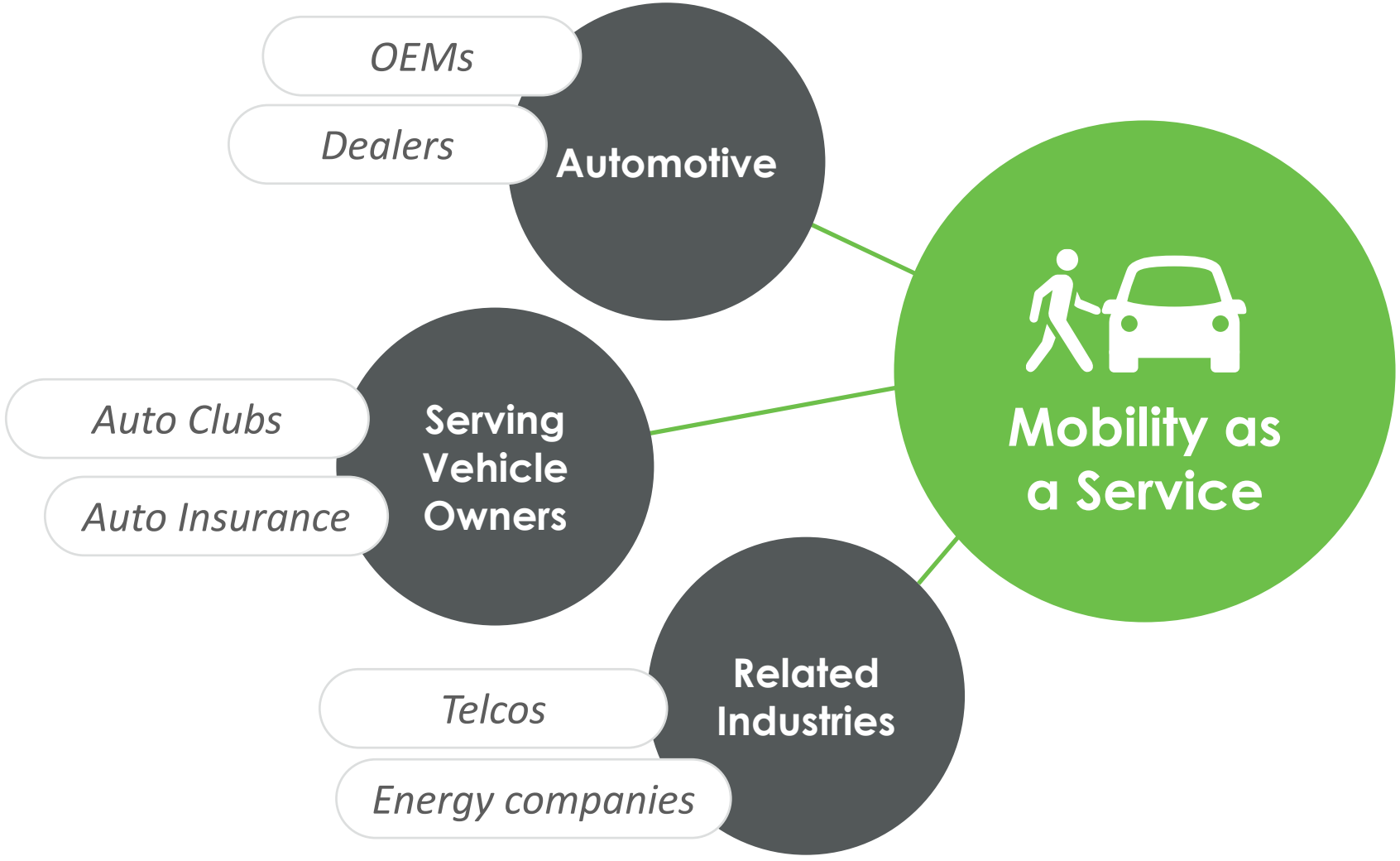
BMW and Daimler invest $1 billion in their joint mobility services



Industries stepping up to new mobility…

…are those that lose when private vehicle ownership declines



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Shared fleets are the first step.

Carsharing

Shared

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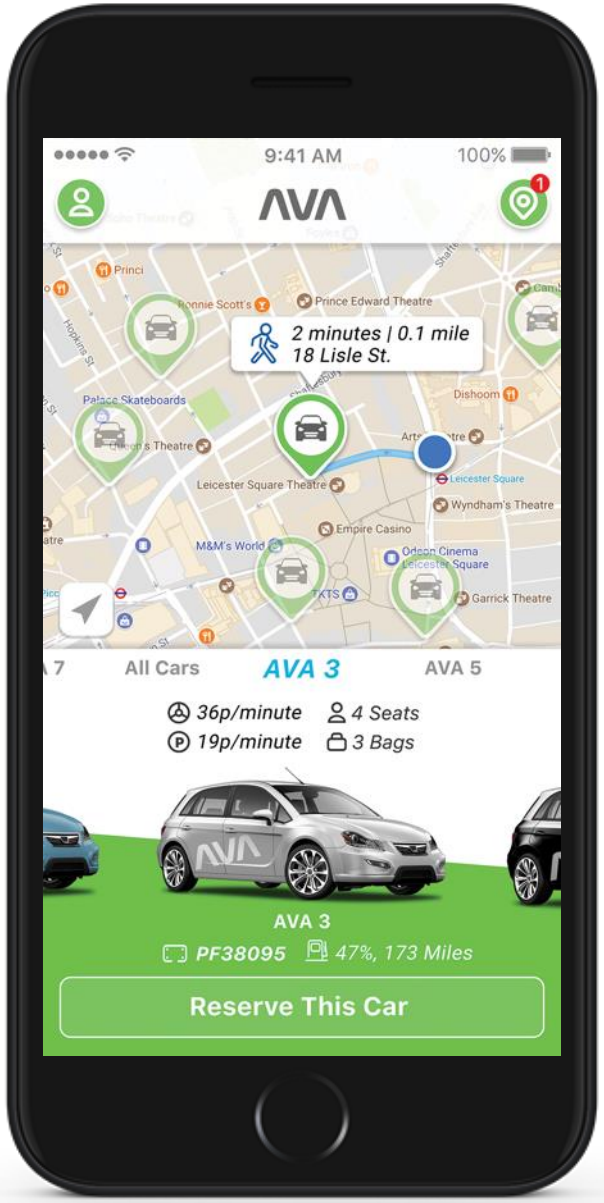
Critical Elements of New Mobility

The potential for multiple users a day

- Authenticate new drivers from their smartphone
- Press a button, car unlocks
- Leave the car, and digitally check for doors/windows open
- Includes insurance, gas, maintenance, cleaning



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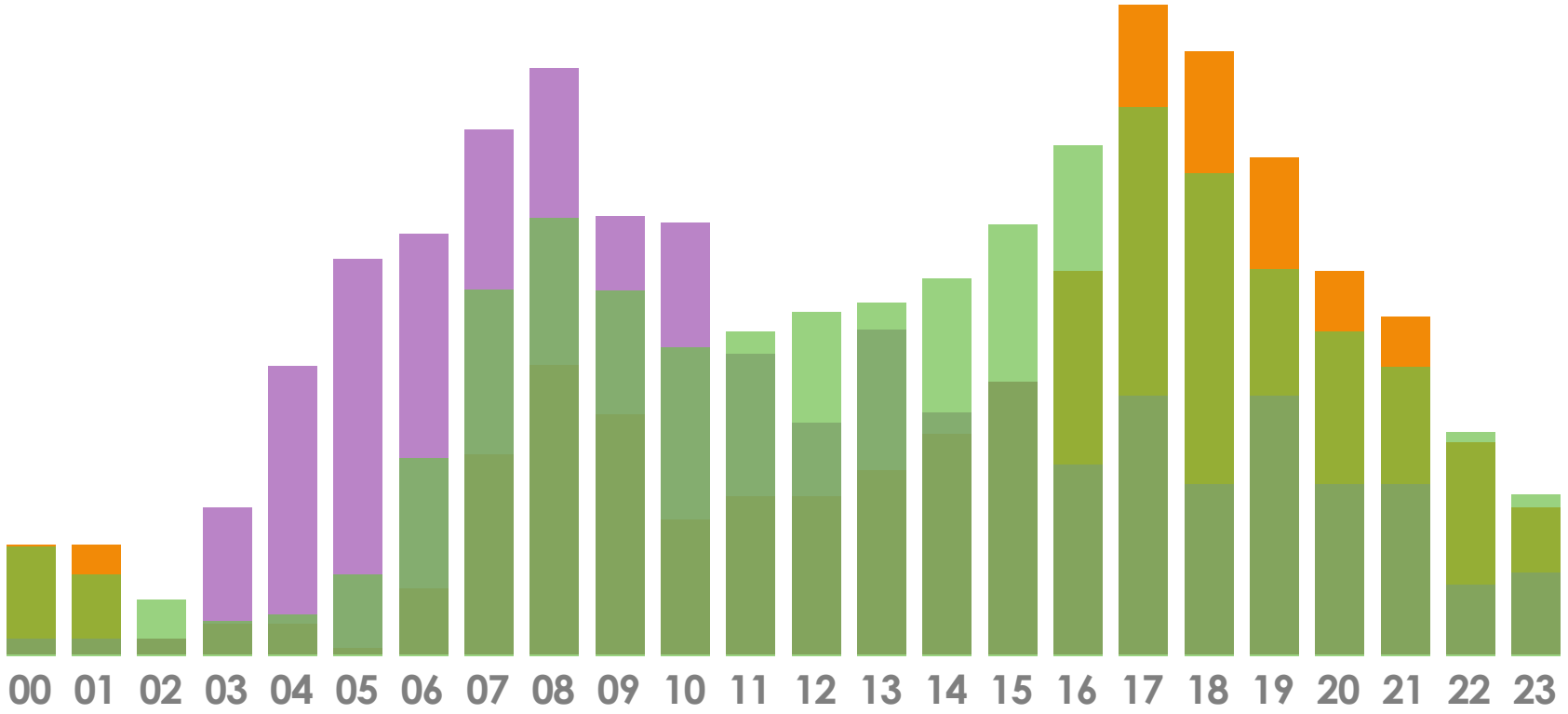
Overlying use cases increases the return on investment

(Aggregated , anonymized data)



Micro-leasing for drivers **Station based, on-demand** **One-way carsharing for consumers**

Shared EV fleets is the next step.

EV Carsharing

Electric

Fleet Charging removes the barriers to wide adoption

Shared

Electric

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Runs on Ridecell:

Source: Sacramento City Express

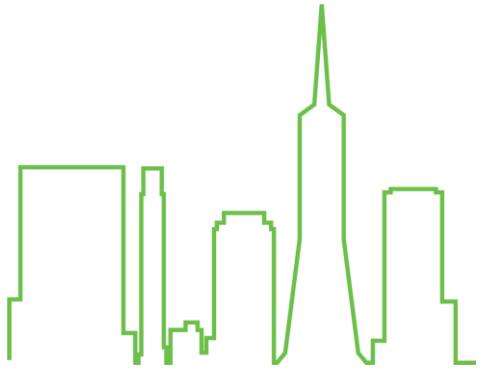
Adding self driving to carsharing fleets

Autonomous Carsharing

L4 Autonomous

Near term use cases for autonomous driving

Low speed



Urban areas

Level 4 autonomous

No passengers

Late Night Fleet operations

- Fleet repositioning to high demand areas
- Movement to charging stations
- Schedule maintenance depot run

Car Hailing – pre ridehailing permit

- Eliminate walking to cars
- Delivery to driver
- Driver drives vehicle to destination
- Vehicle parks itself
- Daytime use cases – make this harder to achieve

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Company

- Company founded in 2009 with focus on new mobility
- Over 25M rides/rentals delivered
- HQ in San Francisco with offices in Europe and India
- Have raised over $40 Million in funding

Customers

ReachNow by BMW

GIG CAR SHARE by AAA

ZITY by ferrovial + RENAULT

Plus over 15 other carsharing/ridehailing customers

Investors

BMW i. khosla ventures Y Combinator

ANDREESSEN HOROWITZ COX AUTOMOTIVE initialized()

DENSO PENSKE DB

MITSUI & CO.

Ridecell Product Line

Customers can use Ridecell end-to-end

– or –

Use Core Fleet &Ops Management to accelerate scale and utilization by integrating with their own software stack using our APIs.

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An End-to-end Solution

Customized Apps / API

Active Fleet Management

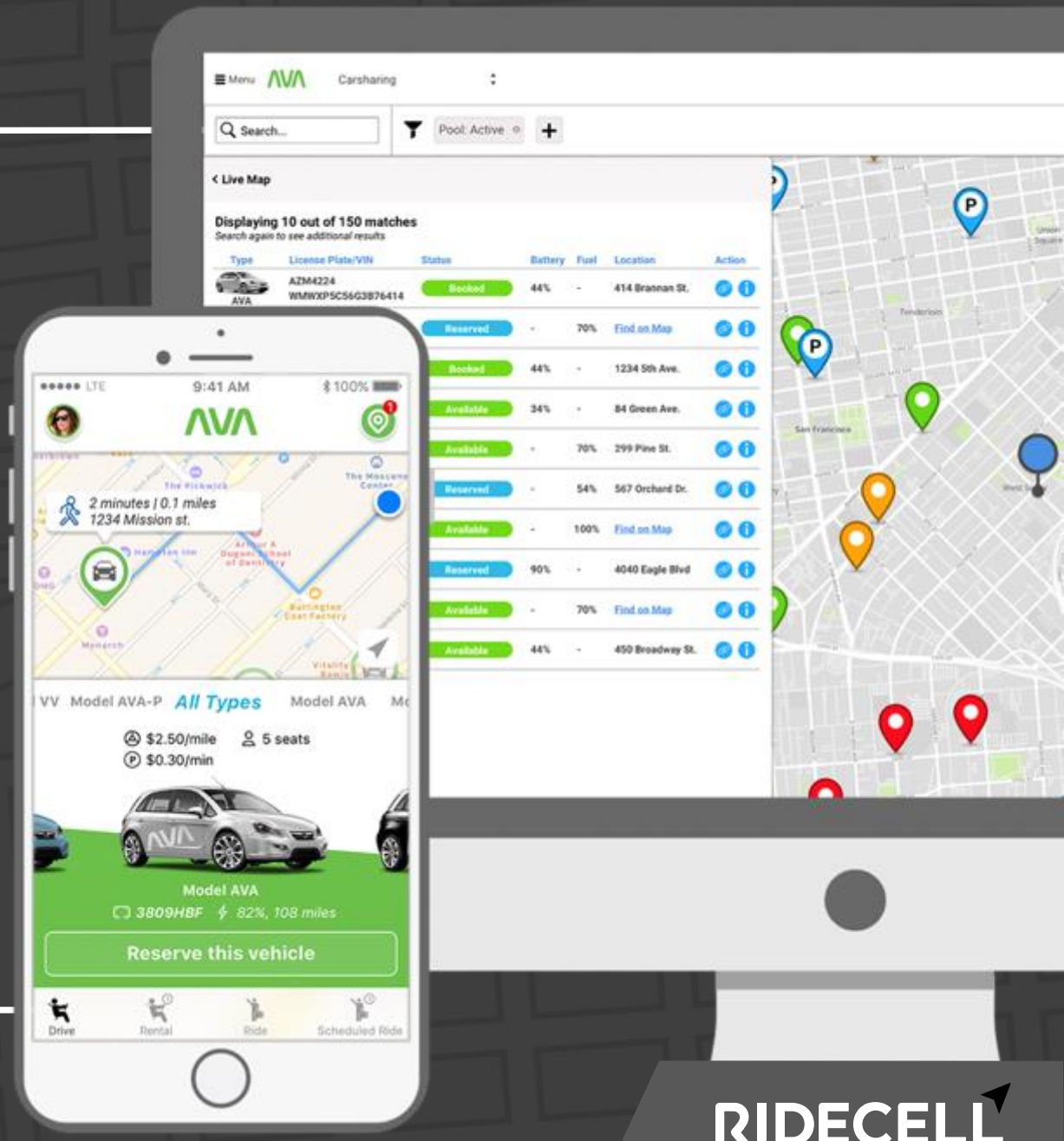
CRM and Marketing Integration

Pricing, Supply & Demand Management

Vehicle Access, Safety, In-vehicle UX

Supplier, Labor, and Task Management

Compliance, Taxes, Accounting



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The New Mobility Cloud

Build a differentiated offering with APIs to replace key features

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