The "Triple Disruption"

Autonomous

On-demand

EVs
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.
Mobility services gain vehicles

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

Mobility service providers gain value

($ Billions) Market cap mobility as a service vs. automotive manufacturers

Source: ARK Investment Management LLC | ark-invest.com
Mobility as a service evolution

- **Self Driving**
- **Autonomous Ridehailing**
  - Own and service a fleet
  - Recruit and manage drivers
- **Driven**
  - Vehicle Ownership
  - Carsharing
  - Ridesharing

RIDECELL
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

- OEMs
- Dealers
- Auto Clubs
- Auto Insurance
- Telcos
- Energy companies

Serving Vehicle Owners

Related Industries

Mobility as a Service

Automotive
Shared fleets are the first step. Carsharing
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
Overlying use cases increases the return on investment

(Aggregated, anonymized data)
Shared EV fleets is the next step.

EV Carsharing

Electric
Fleet Charging removes the barriers to wide adoption
SACRAMENTO POISED TO MAKE ANOTHER BIG LEAP WITH ELECTRIC CAR SHARING

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

35

7 March 2019
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
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
- 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
- MITSUI & CO.
- DB
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.
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
The New Mobility Cloud

Build a differentiated offering with APIs to replace key features