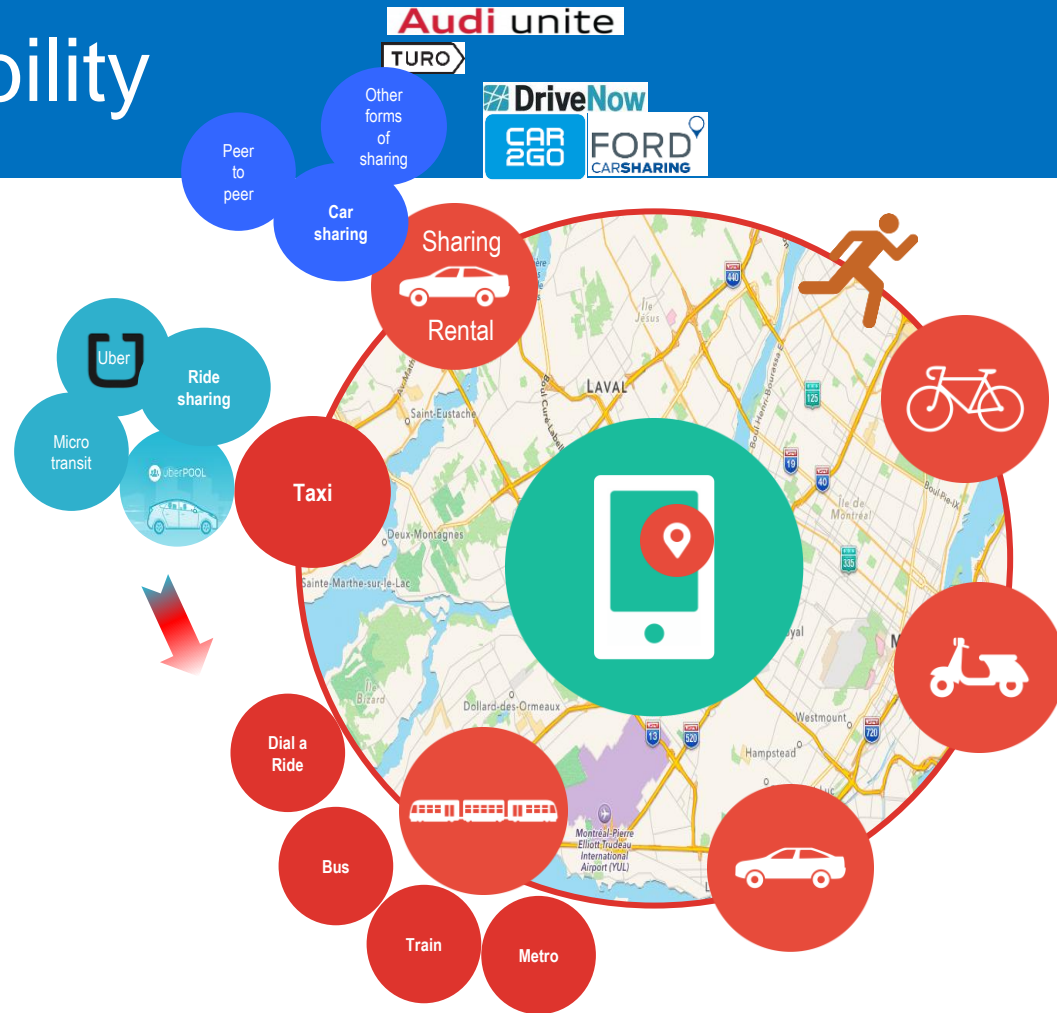
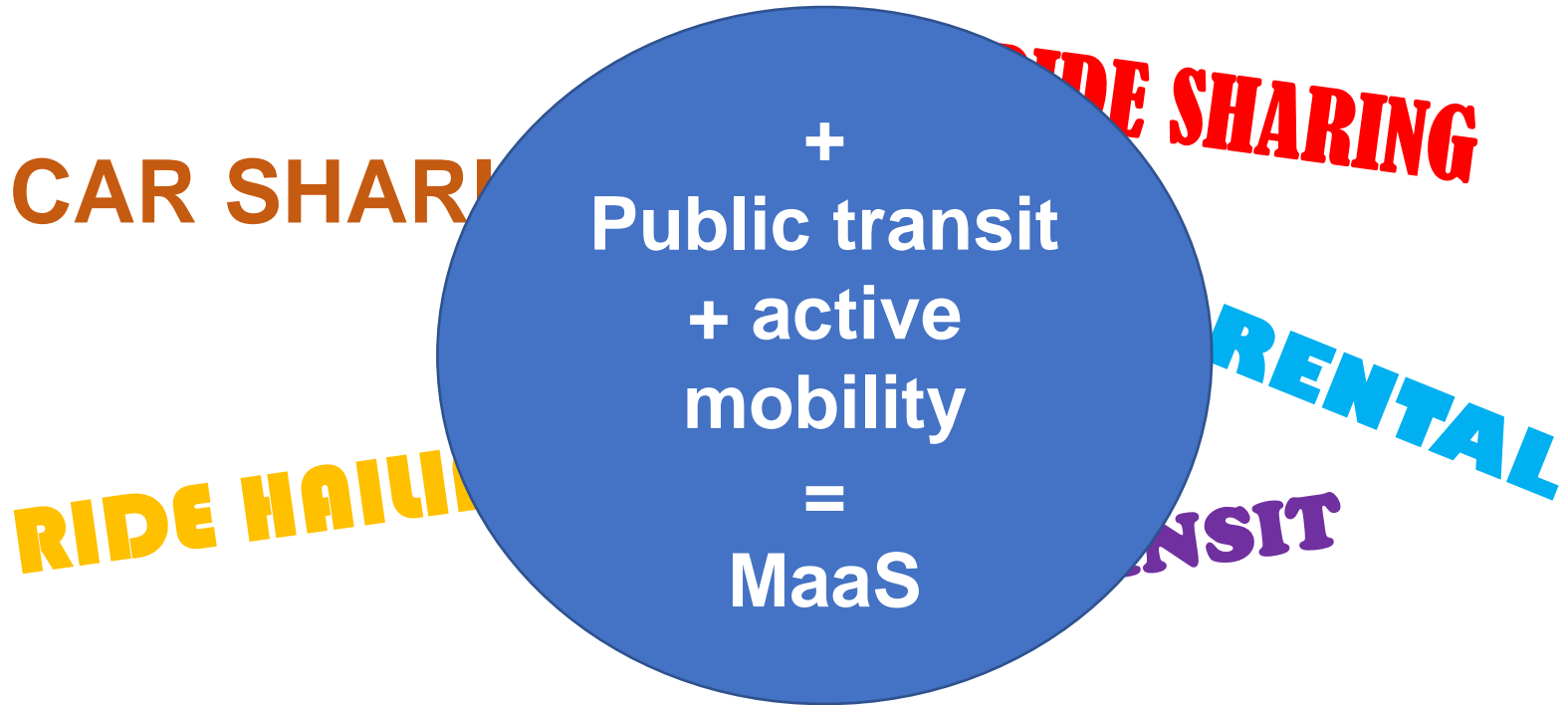


Urban mobility



Today, there's a difference



Car sharing integral to MaaS

MaaS before A-MaaS

Car sharing in Canada

(Non-exhaustive list)

Canadian Carsharing Cooperatives

Name	City	Province
Coast Car Co-op	Gibsons	BC
Community Car Share	Kitchener	ON
Kootenay Carshare Co-op	Nelson	BC
Modo the Car Coop	Vancouver	BC
Nanaimo CarShare Cooperative	Nanaimo	BC
OGO Carshare Coop	Kelowna	BC
Options for Cars	Toronto	Ontario
Peg City Car Co-op	Winnipeg	MB
Regina Car Share Co-operative	Regina	SK
Saskatoon CarShare Co-operative	Saskatoon	SK

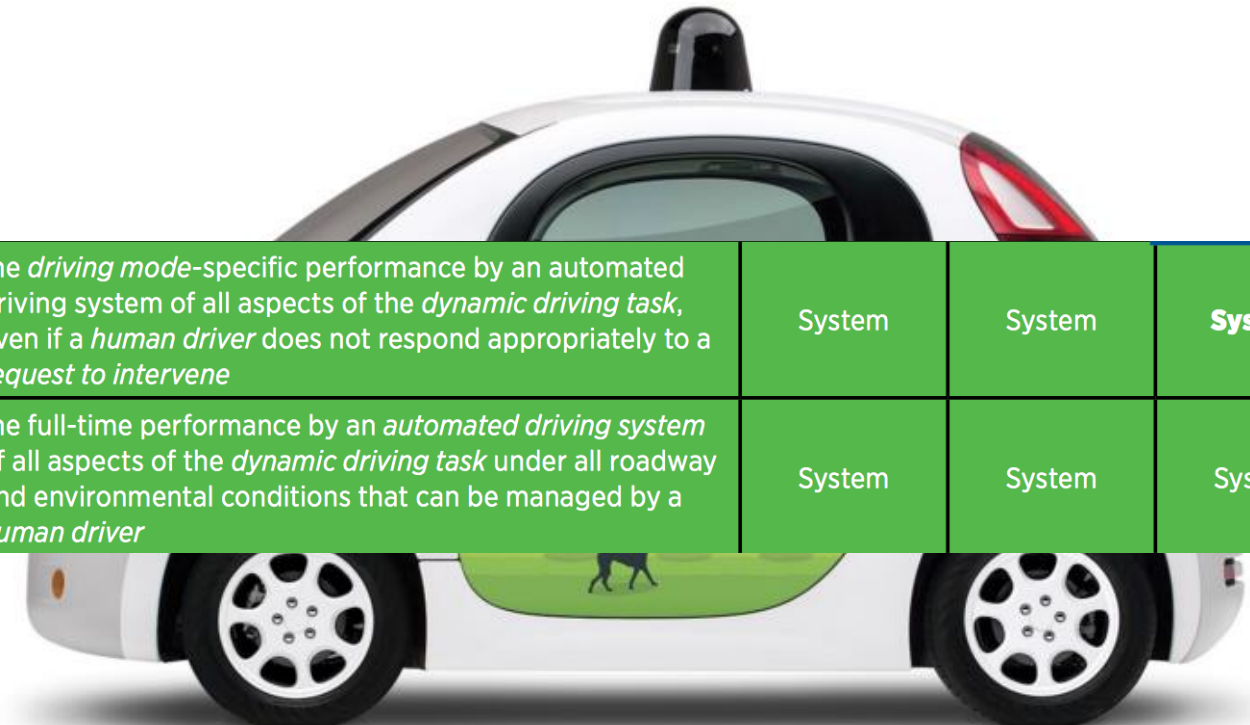
Last updates April 28, 2015



Preparing for urban “usership”



Automation is on it's way

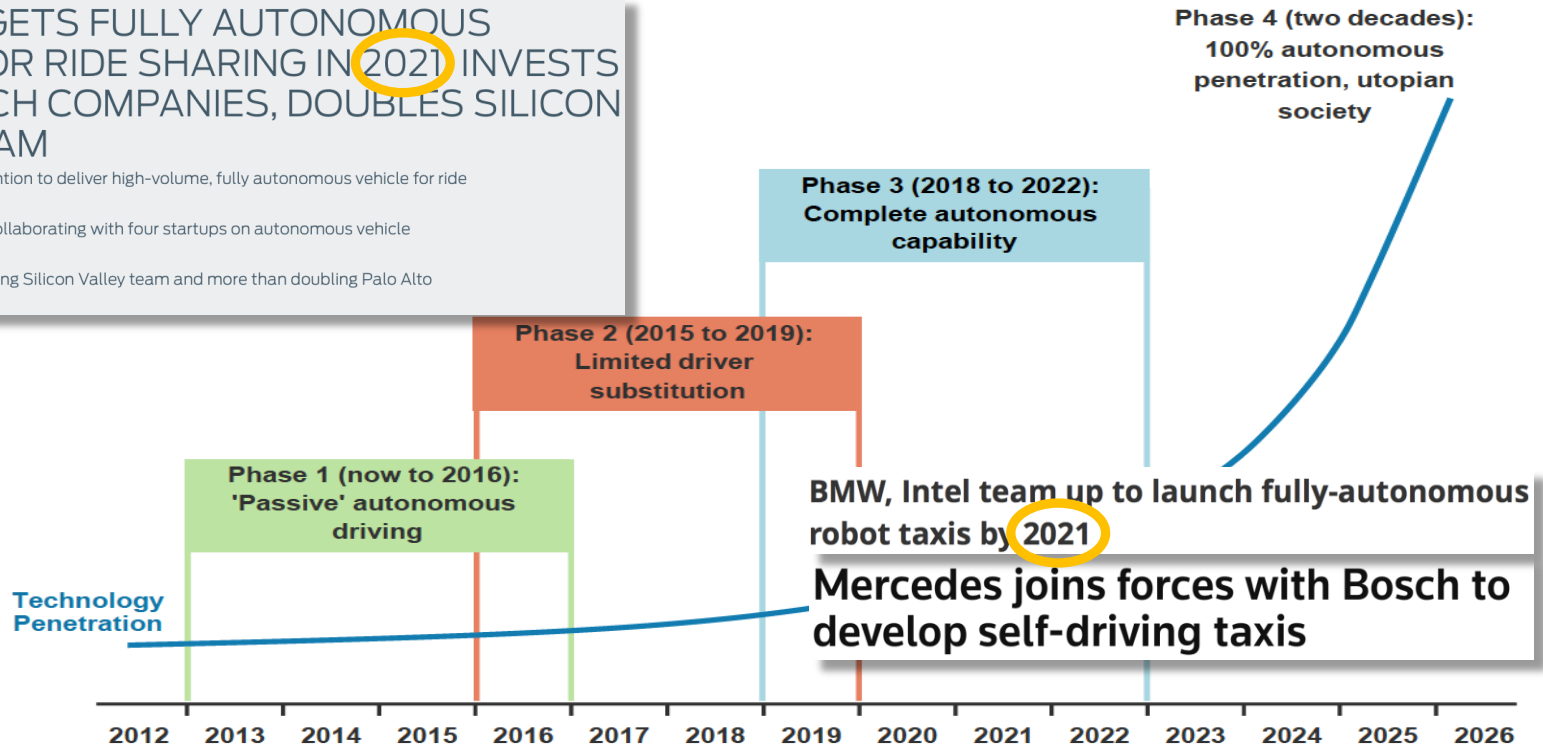


4	High Automation	the <i>driving mode</i> -specific performance by an automated driving system of all aspects of the <i>dynamic driving task</i> , even if a <i>human driver</i> does not respond appropriately to a <i>request to intervene</i>	System	System	System	Some driving modes
5	Full Automation	the full-time performance by an <i>automated driving system</i> of all aspects of the <i>dynamic driving task</i> under all roadway and environmental conditions that can be managed by a <i>human driver</i>	System	System	System	All driving modes

No crystal ball but ...

FORD TARGETS FULLY AUTONOMOUS VEHICLE FOR RIDE SHARING IN 2021 INVESTS IN NEW TECH COMPANIES, DOUBLES SILICON VALLEY TEAM

- Ford announces intention to deliver high-volume, fully autonomous vehicle for ride sharing in 2021
- Ford investing in or collaborating with four startups on autonomous vehicle development
- Company also doubling Silicon Valley team and more than doubling Palo Alto campus



Source: Company Data, Morgan Stanley Research

No crystal ball but ...

Tesla Quietly Announces Self-Driving Rideshare Network

Ford plans self-driving car for ride share fleets in 2021



President and CEO of Ford Motor Company Mark Fields speaks with reporters during the media preview of the 2016 New York International Auto Show in Manhattan, New York March 23, 2016. REUTERS/Eduardo Munoz - RTSBY7L

MAVEN, GM'S CAR-SHARING SCHEME, IS REALLY ABOUT A DRIVERLESS FUTURE



Attractiveness of personal mobility space

> \$10 TRILLION per annum

Attractiveness of personal mobility space



TESLA

> \$10 TRILLION per annum



Audi



HYUNDAI



TOYOTA



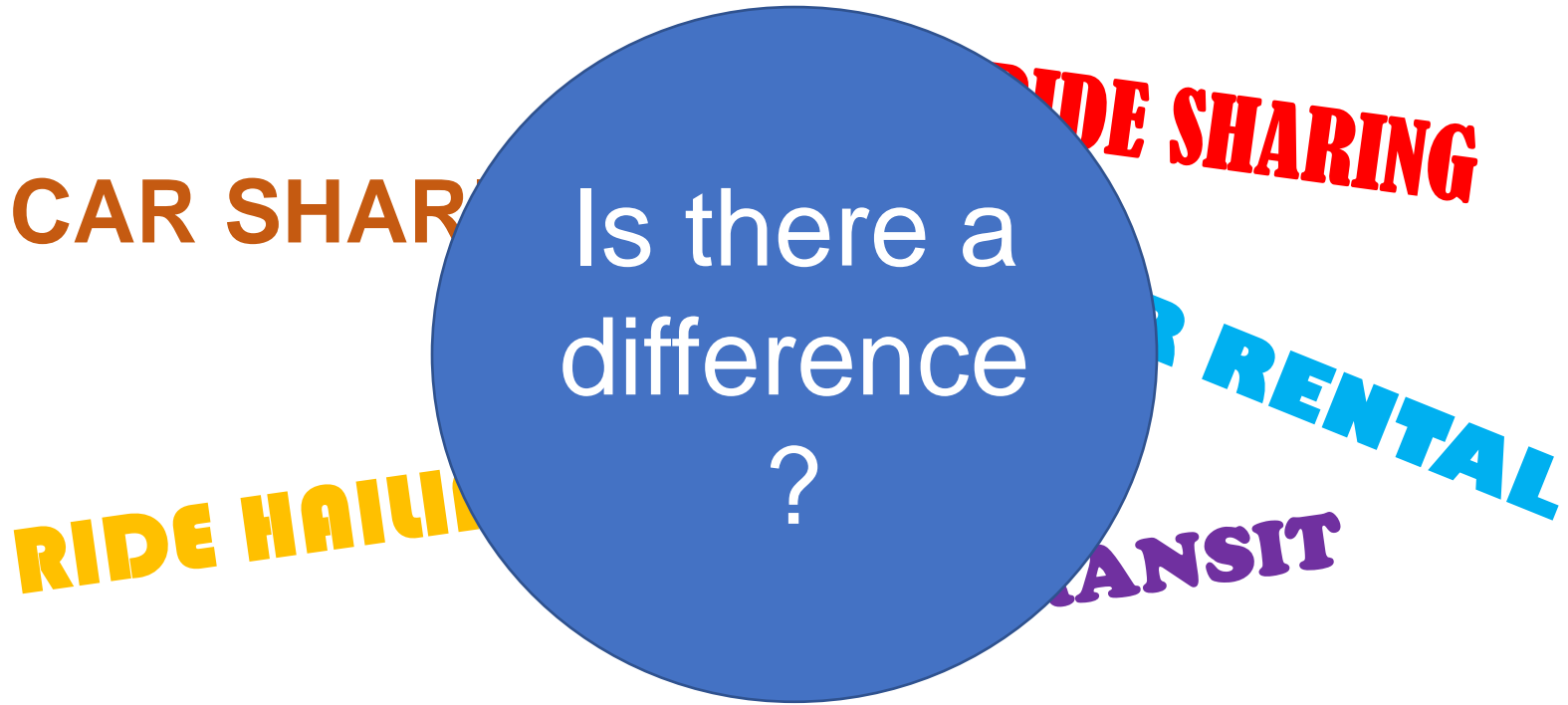
Mercedes-Benz



Audi



In tomorrow's automated world ...



Shared automated mobility services

In a world where big auto manufacturers and other deep-pocket organizations provide shared automated mobility services, **what does it mean for the local car sharing organizations?**

Thank you!



Catherine Kargas

ckargas@marcon-net.com

514.952.6500

@CatherinKARGAS