

Key drivers to boost business



②

①

② ? Who will own/co-in the market of collaborative mobility?

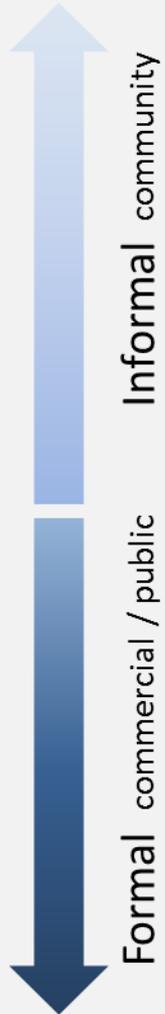
③ ? How will the big players act?

④ ? What will be the role of the numerous start-ups?

⑤ Who might emerge as disruptors?

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Shared cars

Car clubs, 1-way,
P2P, informal



Informal
through family &
friends

Owner-car clubs



P2P



Spare capacity

Dedicated shared resource

Commercial car clubs



Car rental

Shared bikes

Public bike hire,
bike pools, P2P



Informal
borrowing through
family & friends

P2P



Bike pools

Public bike hire



Bike hire

Shared lifts

2+ car sharing



Hitching



Informal
through existing social
networks

Online journey matching



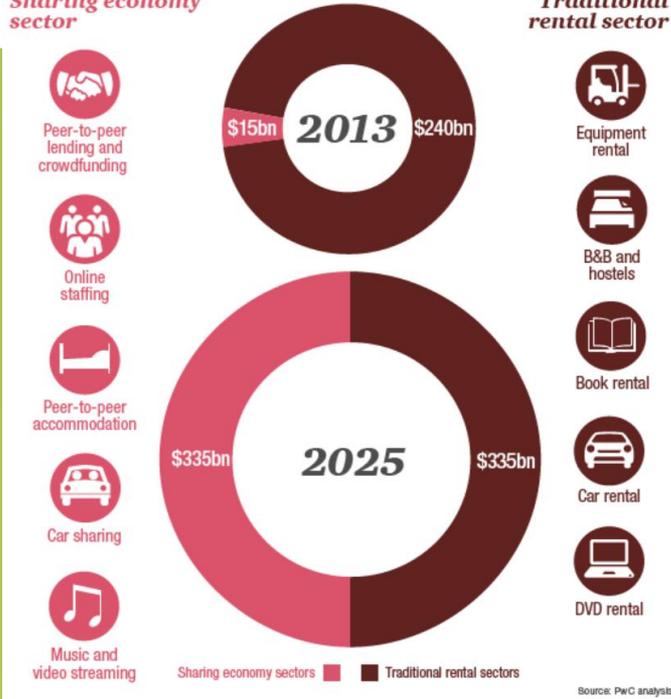
Taxis



Sharing economy sector and traditional rental sector projected revenue growth

Sharing economy sector

Traditional rental sector



“Owning” collaborative mobility?

Influence, develop & deliver, use

- Main CoMo operator(s)
- Public sector?
- Users?
- Emerging (sharing economy sector) operators?
- Disrupter (organisation(s))?

Unlocking the sharing economy
An independent review

by Debbie Wosskow



HM Government

Independent review of the
sharing economy
Government response

How will the big players act?



Car manufacturers

Selling → Leasing → Sharing



PT providers

Partners

Ticketing / booking / billing agents ?

Car sharing & rental

Blurring between sharing / rental

Mixing of models: A-A, A-B,
flexible, rental; P2P

Complete mobility packages

- Partnerships between mobility providers
- 3rd party integrators

What will be the role of the numerous start-ups?



- New CoMo operators
Competition for existing models
- New/mixed CoMo models
- Niche operator applications
e.g. University car / bike share
- Related services
e.g. telematics
e.g. insurance
- Integrators

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Order a pizza, book a plumber and call a taxi... all with the same app

Lizzie Edmonds
LONDONERS will soon be able to order a pizza, book a plumber and call a taxi... all with the same app. These will then be delivered by the shop or restaurant – not cab drivers. free app to include such a range of services. He said: "The app is all about making life easier. We did it with taxis, food delivery service in Los Angeles and Barcelona. In an interview with the Evening

Who will be the (next) disruptors?



- C.f. car manufacturers (2010 -...)
- Public transport sector?
- Sharing economy sector?
- Lifestyle & industry – Google, Apple
- Mobile tech developments
leading, mobility service providers will follow

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Evolution or revolution?

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