

Administration's review of The City's current carshare parking policies involved an assessment of carshare policies in similar municipalities, and how their policies both provide support to carsharing services while meeting the broader mobility goals of each city. It also involved discussions with several carshare organizations to further understand how policies in Calgary and other jurisdictions can support the range of carshare business models.

Table 1 on page 3 of this attachment provides a comparison of The City's current carshare parking policies with comparable cities in North America. Based on discussions with the consulting firm movmi, which specializes in shared mobility services, the western North American cities of Denver, Portland and Vancouver are most similar to Calgary in terms of user behaviour.

Based on the findings from the jurisdictional comparison, several key findings emerged that guided the recommended policy changes contained in Attachment 3. These are as follows:

#### 1) Ability to Overstay Posted Time Limits

The ability to overstay posted time limits was raised as a concern by several carshare organizations. Analysis by movmi found that carshare vehicles are typically used 5 to 10 times per day, which is generally consistent with information provided by the carshare organizations engaged by Administration. This means that carshare vehicles will sometimes remain parked in a single location longer than typical posted time limits.

It is in the interests of carshare organizations to have their vehicles used frequently in order to maximize revenue. Frequent use of carshare vehicles would consequently reduce the amount of time the vehicles would be parked in a single location. Carshare organizations generally plan their home zones and/or dedicated parking spaces based to match anticipated demand and maximize use of their vehicles. Some organizations also arrange to have vehicles moved by staff to higher demand locations in order to increase use, and therefore revenue.

Since Calgary's carshare policies were approved in 2015, several municipalities have updated their policies to allow carshare vehicles to overstay posted time limits. The Cities of Denver and Portland do not place any restrictions on the ability to overstay any posted time limit. Vancouver exempts carshare vehicles from its city-wide 3 hour time limit at metered and residential permit spaces, but continues to enforce posted time limits and unmetered spaces (which are a minority of the on-street curb space).

Allowing carshare vehicles to exceed posted time limits of one hour or longer in Calgary would recognize the unique operating characteristics of carshare vehicles, and significantly reduce the risk of parking tickets for carshare organizations.

Administration recommends that restrictions less than one hour should continue to apply, as these spaces serve an important function for pick-ups and deliveries. Concern about loss of such spaces was identified through development of the Goods Movement Strategy, particularly for emerging delivery services.

#### 2) Permit Pricing for Carshare Vehicles

The need for predictable and consistent parking fees, that are sustainable over the long-term for carshare operators, was another important issue raised by the carshare industry. In car2go's recent announcement that it was leaving the North American

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market, operating costs were identified as a key issue, along with rapid changes to the shared mobility sector, and limited access to infrastructure that supports new technology such as electric vehicles.

The contract between the Calgary Parking Authority and car2go had already begun to address the desire for predictability by moving to a fixed monthly fee for on-street and off-street parking, based on previously observed parking activity. The recommended tiered pricing structure will further increase predictability for carshare companies by setting a consistent and transparent fee for on-street parking. This in turn allows the carshare companies to more accurately plan future operating costs and plan for fleet expansions as needed.

Feedback on Calgary's current carshare parking policies from other carshare organizations indicated that the current fees for parking in residential permit zones are reasonable. However, Administration was also advised that as a mid-size market (compared to larger cities such as Vancouver or Toronto), The City should ensure that fees remain competitive with other jurisdictions.

The recommended pricing for each tier, as shown in Attachment 3, are designed to be competitive with other jurisdictions, while adequately valuing limited parking resources, particularly in the downtown core.

The \$450 fee for Tier 1 is unchanged from The City's current policy for carshare vehicles to park in unpaid and residential permit spaces.

The \$840 Tier 2 fee is designed based on both benchmarks from other cities (Denver in particular) and feedback from the carshare industry on sustainable annual fees. This tier does not allow parking in predominately non-residential areas of the downtown core, which (See Figure 2 in Attachment 3). This tier offers increased flexibility for carshare companies to reduce parking fees if access to the downtown core is not a requirement for their business model.

The higher \$1440 Tier 3 fee, which allows on-street parking in Calgary's downtown core, is based in part on fees historically charged to carshare operators in Calgary, and on benchmarks with other cities to ensure Calgary remains competitive without devaluing the limited parking availability in the downtown core.

Administration recommends providing a 50% discount for the fee in each tier for fully battery electric vehicles. This will support increased use of electric vehicles to reduce greenhouse gas and local air pollution emissions, consistent with The City's Climate Resilience Strategy and associated Electric and Low-Emissions Vehicles Strategy. It is also in keeping with reduced fee requirements for low emission vehicles in Vancouver and Montreal.

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**Table 1 – Carshare Parking Policies Comparison**

	<b>Calgary (2015)</b>	<b>Denver</b>	<b>Portland</b>	<b>Vancouver</b>	<b>Montreal</b>	<b>Seattle</b>
<b>On-Street Parking</b>	Parking allowed in any on-street space > 2hr (standard parking rates apply; effectively \$1,440 / vehicle / year)	\$850 / vehicle / year (exempts vehicles from meter payment and RPP restrictions for locations > 2 hrs)	Parking allowed in any public parking space (standard parking rates apply; effectively \$1,060 / vehicle / year)	First 2 hrs parking free for carshare vehicles in the middle of a trip  50% on-street discount for up to 50 zero emission vehicles per carshare company	Piloting parking in metered spaces  Allowed in non-metered spaces without posted parking restrictions	\$930 / year / vehicle to cover > 1hr metered parking +  cost difference if vehicles exceed \$930 / year
<b>Residential Parking Permits (RPP)</b>	\$450 / vehicle / year		\$100 / vehicle / year	\$77 / vehicle / year  or  Fee waived for zero emission vehicles	\$835 / vehicle / year  or  \$300 / electric vehicle / year	\$800 / vehicle / year
<b>Time Limit Restrictions</b>	All posted time limit restrictions apply	Vehicles may remain parked beyond time restriction without penalty	Vehicles may remain parked beyond time restriction without penalty	Vehicles exempted from default 3 hour parking limit (except at non-residential un-metered spaces)	All posted time limit restrictions apply	All posted time limit restrictions apply
<b>Carshare Clustering</b>	Max 25% of high-demand commercial blocks (over a month)  Max 20% of residential block (over a month)	No policies on clustering	Clustering addressed on ad hoc basis	No policies on clustering	No policies on clustering	No policies on clustering

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Dedicated On-Street Stalls	\$1,000 / year or value of lost revenue + \$50 admin fee (RPP / ParkPlus zones only)  City may create dedicated spaces at its discretion for no permit fee (standard parking rates apply)	Unmetered Parking: \$750 / year downtown (max 30 spaces downtown) \$500 / year non-downtown \$250 / year suburban  <u>Metered Parking:</u> 1/3 lost revenue	\$350 / year (allocated via auction)	\$3,000 to \$25,000 / year for metered spaces  \$300 to \$1,350 / year for non-metered spaces  Flat rate offered for zero emission vehicles	Designated on-street parking stalls provided outside the home area	\$3,000 / year in paid parking spaces  \$300 / year in non-paid parking spaces
Carshare Clustering	Max 25% of high-demand commercial blocks (over a month)  Max 20% of residential block (over a month)	No policies on clustering	Clustering addressed on ad hoc basis	No policies on clustering	No policies on clustering	No policies on clustering
Bike / Scooter Sharing?	Yes	Yes	Yes	No (coming soon)	Yes	Yes
Transportation Network Companies?	Yes	Yes	Yes	Yes (just starting)	Yes	Yes