



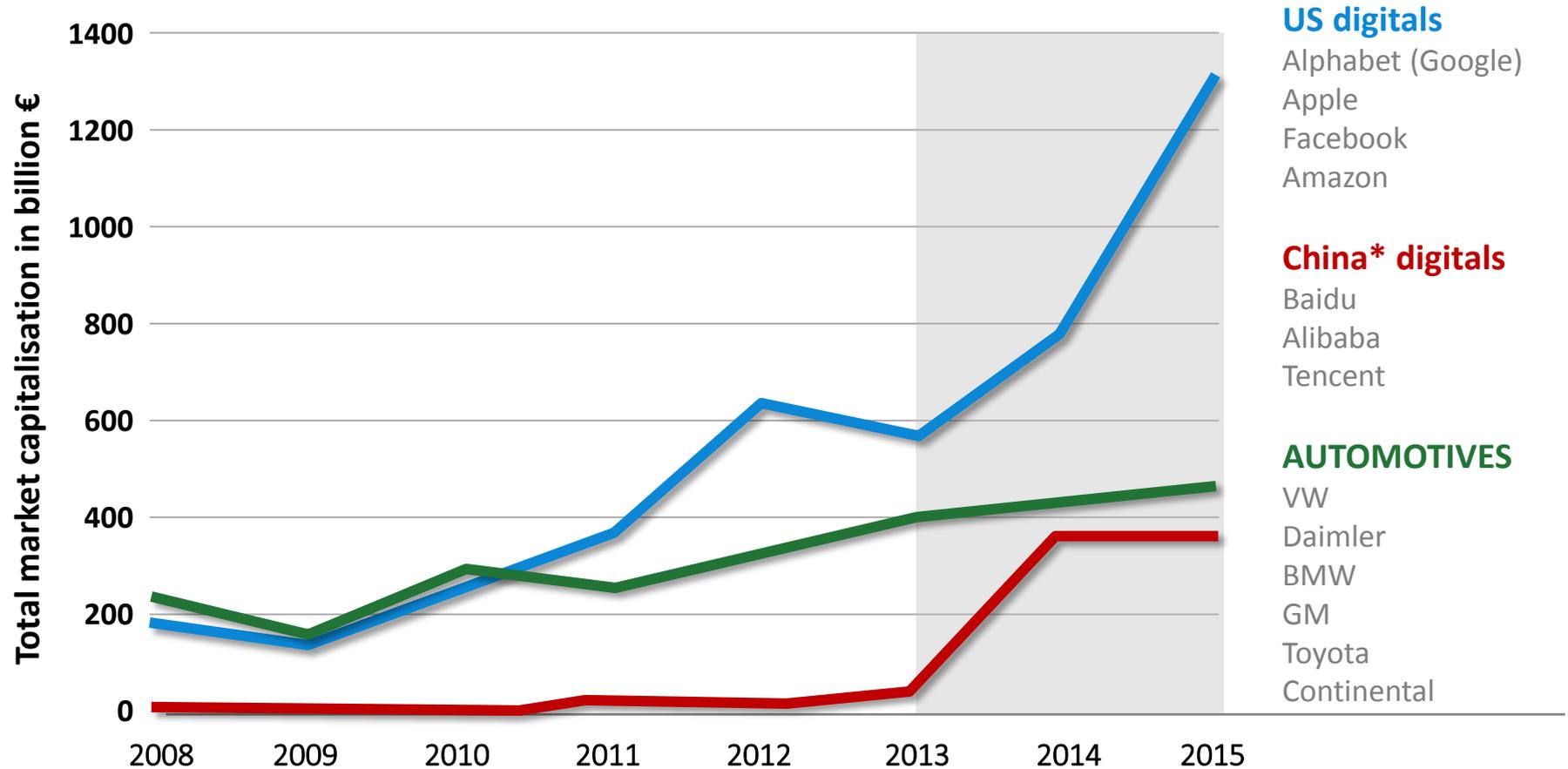
The Ecosystem of Mobility

06/14/2016

GABA 
California
German American
Business Association

Industry comparison: digitals vs. automotives (selection)

Market capitalisation = Trust of investors

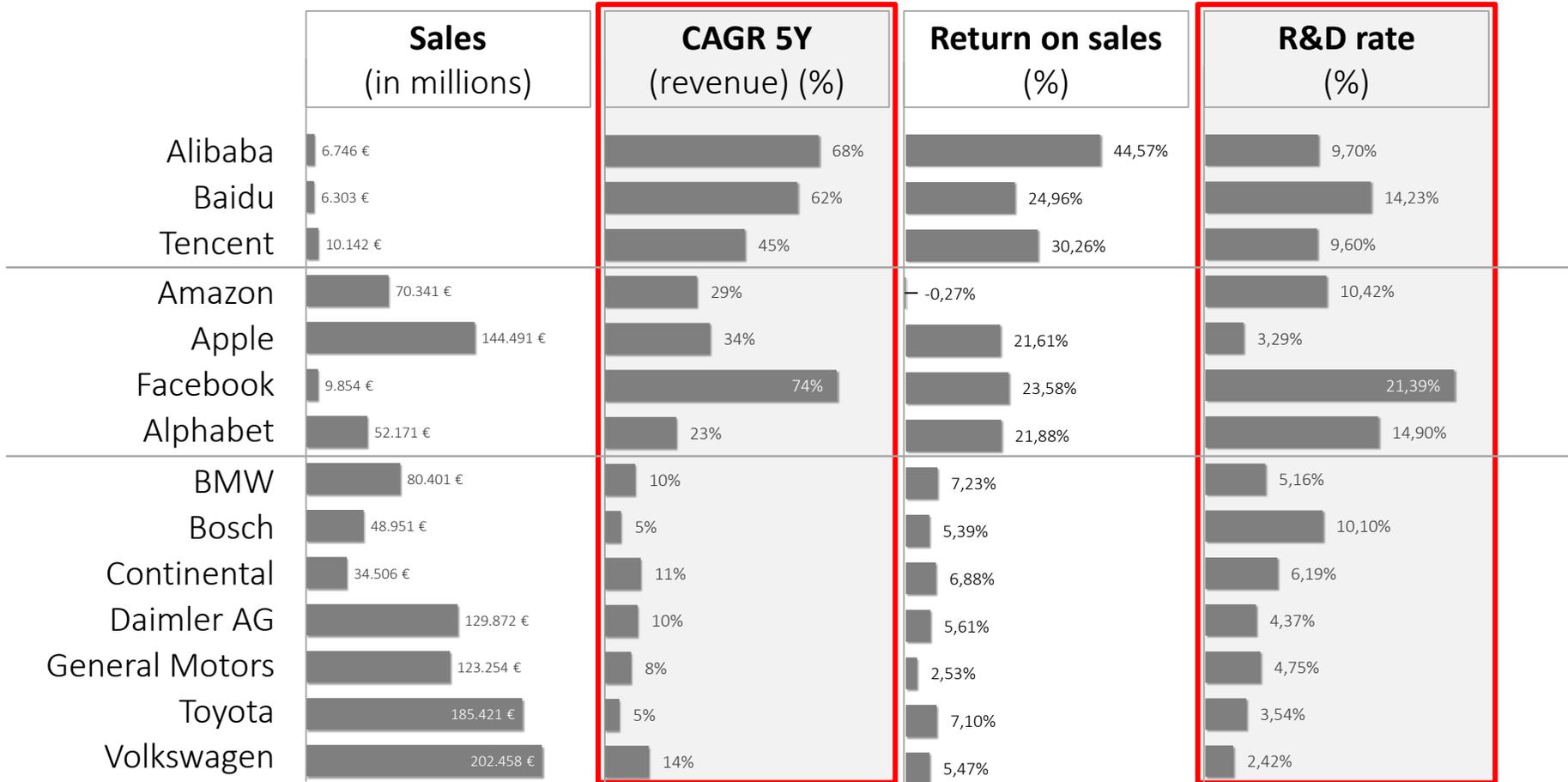


Four US digitals are three times the value of six automotives
Significant increase among Chinese digitals

*only Baidu until 2013
Sources: Business reports

Company comparison

Key business indicators

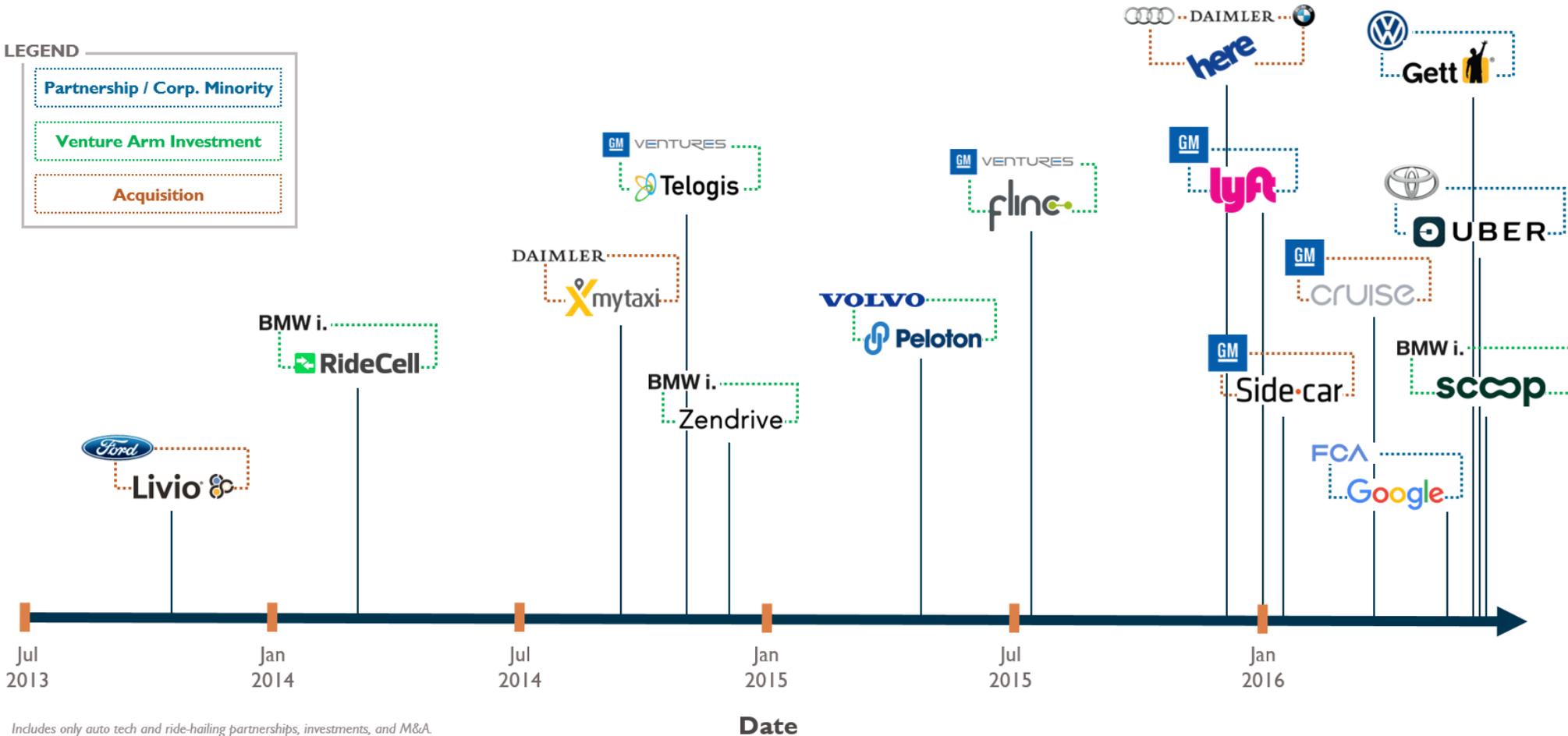


CAGR & return on sales among digitals four times higher
R&D rate among digitals is also four times higher

Sources: Business reports, own research

Big Auto's Tech Partnerships, Investments & Acquisitions

LEGEND



Includes only auto tech and ride-hailing partnerships, investments, and M&A.



Source: <https://www.cbinsights.com/blog/auto-corporates-investment-ma-timeline/>

Electric Vehicle Companies - Overview



Source: <https://www.techinasia.com/electric-vehicle-race-teslas-inspired-world-infographic>

Autonomous driving – Digitals' focus /goals (Scenario)

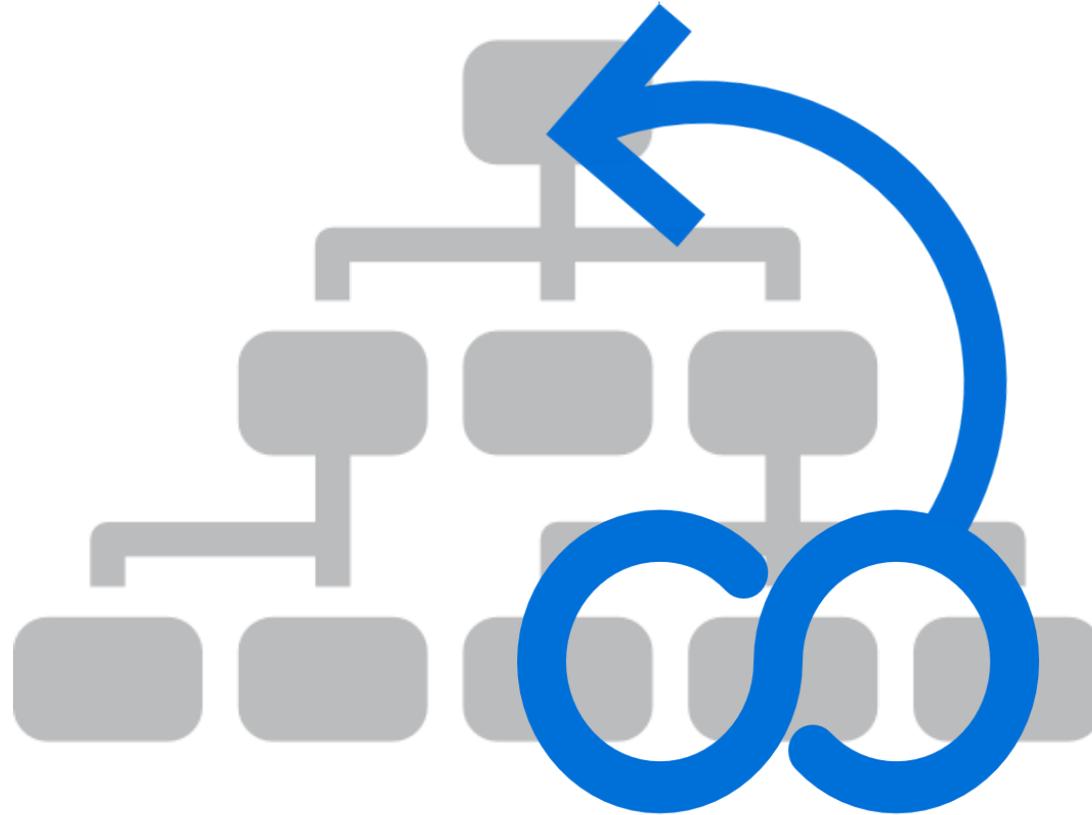
Internet services in vehicles = Advertising = Revenue



**Which roles / services / global users remain for automotives?
Autonomous driving = More time for services**

Process Vicious Circle

Startups Perspective of OEMs Decision Process



40 meetings = 80hrs of work = one week
Discussion of the same topic over and over again