

# **Outlines**

What do Mind the Bridge call Mobility?

Funding and M&A overview

Startup Players



# **Mobility**

The ability to move or be moved freely and easily – Oxford Dictionary

**Mobility** includes Technologies and Services that help people or goods to **move around more freely**.

Ted Serbinski



# How We Move from A to B Is Changing Drastically Fast

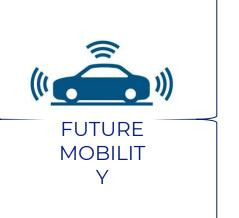
Cost

**Access** 

**Technology** 

Infrastructure

**Regulations** 



### Urbanization

2/3 population expected to live in urban environments by 2040

### **Sharing Economy**

Society transiting from ownership-centric to sharing

### **On-Demand**

We acquire products and receive them <1 hour

### **Mobile Technology**

Everyone has a supercomputer in their pocket – Mobile penetration

**Automotive** is now too narrow of a term.

A new term needs to be used to include all of these new technologies and services.

We call it **Mobility** and **AutoTech**.



# **Autotech: Scaleups and M&As**

Funding Amount is Booming

\$374M • 110 Scaleups in Europe, \$4.5B in Capital Raised \$320M Mind the Bridge \$142M \$58M \$54M \$29M \$32M \$7M \$7M 2011 2012 2013 2015 2017 2010 2014 2016 2018

Capital raised per year



# **Big Automotive OEMs Acquiring Startups**

| Acquired Company          | Country | Founded | Industry    | Acquirer                | Year of M&A | Price (\$M) |
|---------------------------|---------|---------|-------------|-------------------------|-------------|-------------|
| ParkMobile                | USA     | 2008    | Mobility    | BMW                     | 2018        | undisclosed |
| Beat                      | GRC     | 2011    | Mobility    | Daimler - Mercedes-Benz | 2017        | \$ 43       |
| CINTEO GmbH               | DEU     | 2015    | Advertising | Daimler - Mercedes-Benz | 2017        | undisclosed |
| flinc GmbH                | DEU     | 2010    | Mobility    | Daimler - Mercedes-Benz | 2017        | undisclosed |
| PayCash Europe S.A.       | LUX     | 2012    | Fintech     | Daimler - Mercedes-Benz | 2017        | undisclosed |
| FlightCar                 | USA     | 2012    | E-commerce  | Daimler - Mercedes-Benz | 2016        | undisclosed |
| Intelligent Apps (mytaxi) | DEU     | 2009    | Mobility    | Daimler - Mercedes-Benz | 2014        | undisclosed |
| Free2Move                 | DEU     | 2013    | Mobility    | Peugeot                 | 2016        | undisclosed |
| CARIZY                    | FRA     | 2015    | E-commerce  | Renault                 | 2018        | undisclosed |
| Power Vehicle Innovation  | FRA     | 2006    | Autotech    | Renault                 | 2017        | undisclosed |
| Sylpheo                   | FRA     | 2010    | Mobility    | Renault                 | 2016        | undisclosed |
| WirelessCar               | USA     | 1999    | Autotech    | Volkswagen              | 2018        | \$ 112      |
| PayByPhone Technologies   | CAN     | 2001    | Mobility    | Volkswagen              | 2016        | undisclosed |
| Sunhill Technologies      | DEU     | 2001    | Fintech     | Volkswagen              | 2015        | undisclosed |
| Garantibil                | SWE     | 2012    | E-commerce  | Volvo                   | 2017        | undisclosed |
| Luxe                      | USA     | 2013    | Mobility    | Volvo                   | 2017        | undisclosed |



## **Key Trends in Autotech**

### ELECTRIFICATION

Despite seeing global sales of new electric vehicles quadruple between 2014 and 2017, the absolute share of plug-ins remains remarkably small. Compelled by increasingly light emission standards and fear of being left behind, OEMs are nevertheless committing billions towards Electrification. Assuming price parity by 2024, and sufficient investment in supporting infrastructure, we can see the global electrified car count top 100 million by 2030.

#### Key hurdle:

- 1. Supporting infrastructure
- 2. Price parity

#### AUTONOMY

With the potential to rid the transportation industry of its single largest cost, while at the same time making transport safer, cheaper, and more enjoyable, the stakes are monumental. With well over 50 companies investing heavily in driverless R&D, the market is experiencing a flurry of investments, partnerships and acquisitions. While Waymo and Cruise are arguably pulling out ahead, autonomous driving is very much a city-by-city battle leaving ample room for regional contenders to step up.

#### Key hurdle:

- 1. Legislative frameworks
- 2. Technology readiness

Future mobility

### SHARED MOBILITY

Having received the lion's share of investments since 2014, shared mobility truly epitomises the coming of age of Autotech. Spearheaded by Uber and Didi – 2018 saw over half a billion people use some kind of ride hailing service – the sector continues to expand into new geographies and new modes of transportation. Once content with just minority stakes, OEMs and Tier 1 suppliers are increasing their grip on the space, launching their own services and acquiring competition in the process.

#### Key hurdle:

- 1. Legislative frameworks
- 2. Integration, multi-modality

### CONNECTIVITY

The sheer volume of data being generated within the future automotive ecosystem will not only improve road safety, traffic management and efficiency, but will also transform how people interact with vehicles and experience mobility altogether. The explosion of data, effectively turning cars into data centres on wheels, will however require a redesign of both in-vehicle and vehicle-to-everything communication technology, as well as a fundamental discussion around data privacy and security.

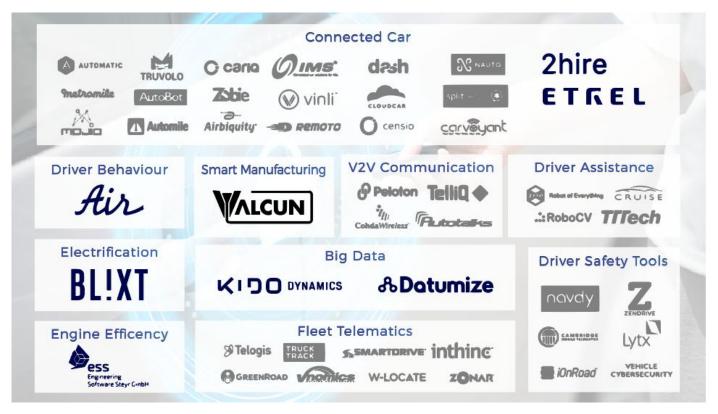
#### Key hurdle:

- 1. Standardisation
- 2. Privacy and security



## **Disrupting Automotive**

Players bringing new technologies to different areas of the industry



### **Conclusions**

New technologies = New biz models
Startups are NOT a threat

**OEMs** must grasp possibilities of new technologies to face **tech giants** leveraging **hundreds of years of know-how and expertise** in automotive.

