SEP Scaleup Summit | Milan

Deep Dive | Automotive

Mind the Bridge

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

FUTURE MOBILITY

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

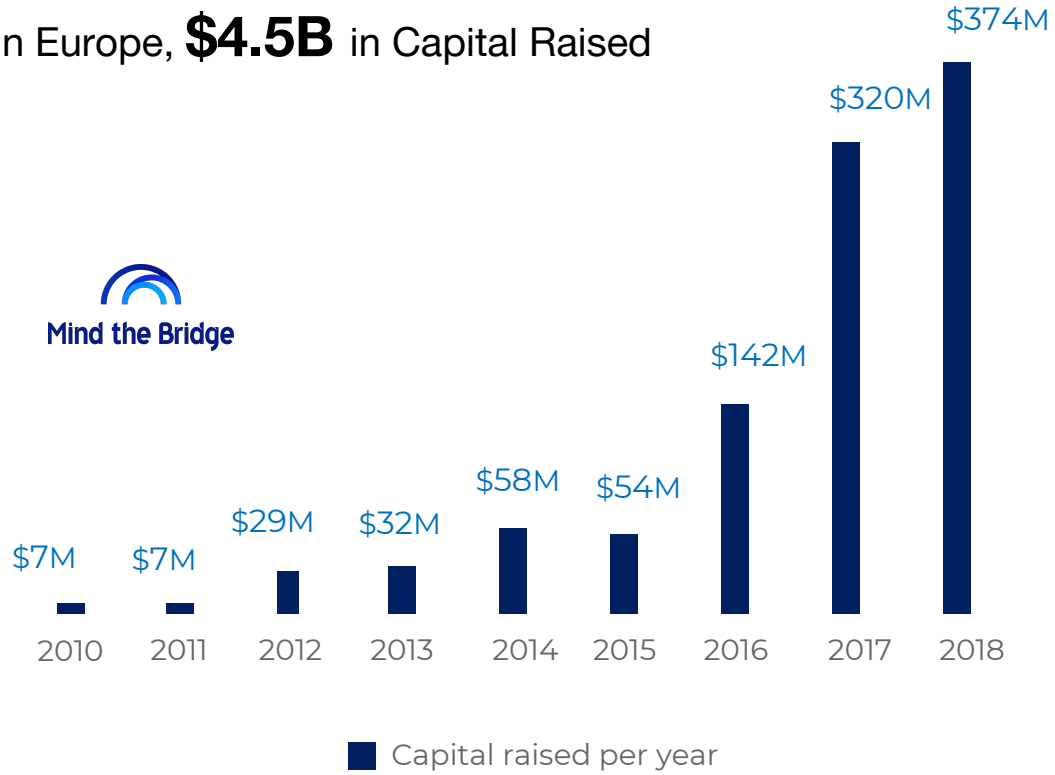
Mobile Technology
Everyone has a supercomputer in their pocket – Mobile penetration

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

- **110** Scaleups in Europe, **$4.5B** in Capital Raised

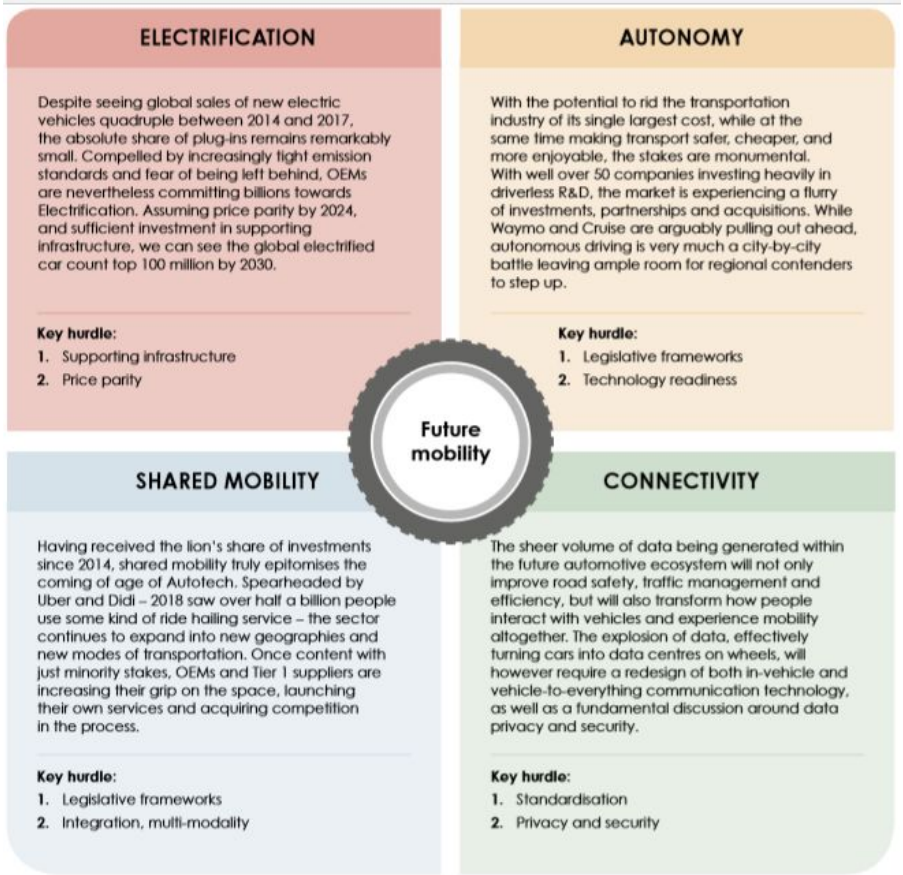


Big Automotive OEMs Acquiring Startups

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*

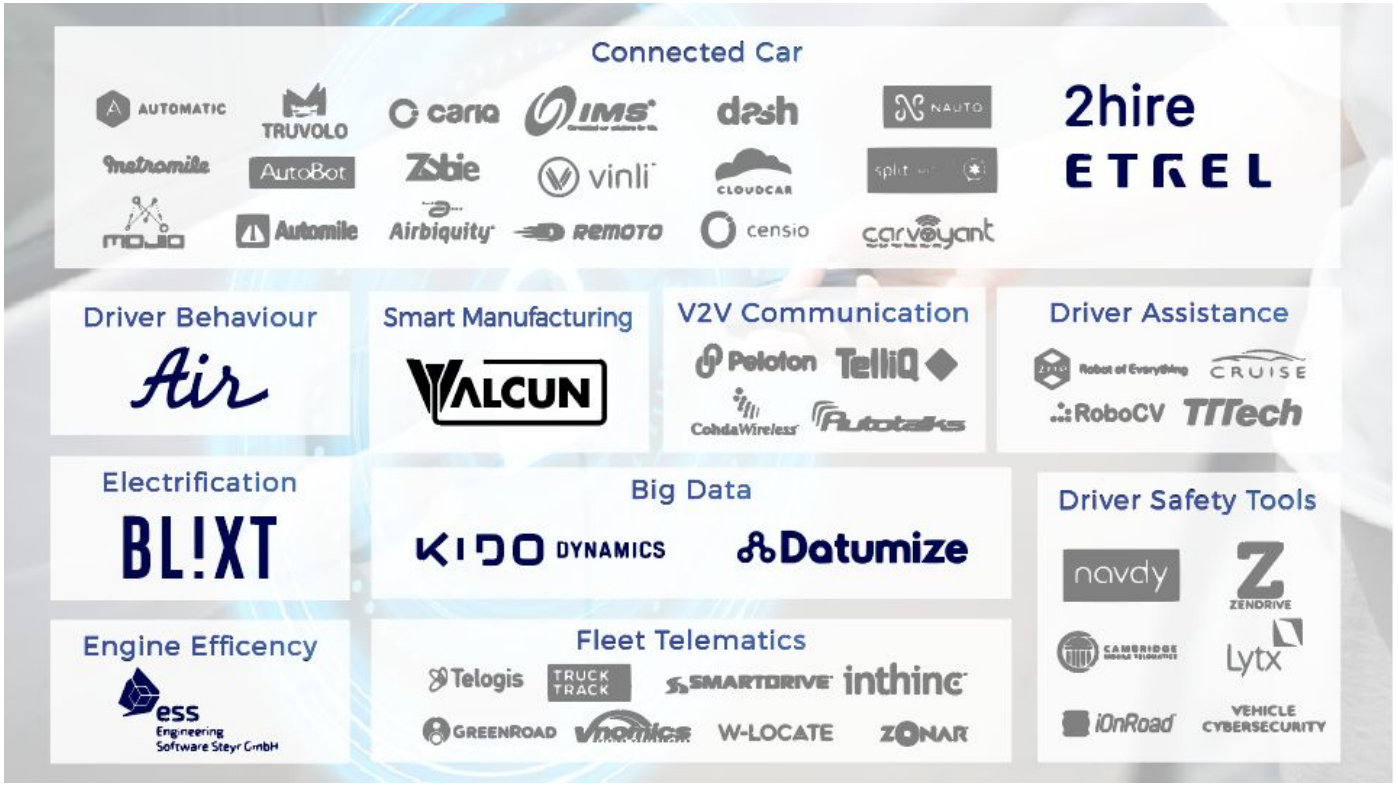
Data courtesy of: crunchbase

Key Trends in Autotech



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.