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CASES

#211

# Disruptor OEM Guide

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- Executive Summary
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### 212 – Tech Giants in Automotive

This report outlines the role of tech giants in automotive, detailing their current offerings & partnerships and exploring how equipped they are for expansion. Thorough company profiles establish how competitive, or collaborative, each giant is likely to be with traditional automakers.

The automotive industry has recently seen an influx of new brands, start-ups, and OEMs. While many perceive Tesla to be at the forefront of this movement – having developed a range of vehicles, technologies, and services in a short span of time – a growing ecosystem of new disruptive OEMs is seeking to change this. Many are providing unique offerings, consumer-oriented features, and more affordable solutions in a bid to disrupt the overall automotive landscape.

As this ecosystem develops at an increasingly rapid pace, interest in its players is growing among investors and legacy OEMs. Likewise, while these disruptive OEMs unveil new conceptual vehicles and announce new production-intent models, they are also securing partnerships with companies spanning the automotive landscape. These partnerships scaling from supplier agreements with small start-ups to acquisitions from major OEMs seeking to broaden the scope of their vehicle line-ups or enhance their current offerings.

This report thoroughly profiles new and emerging automakers from around the world and highlights the maturity of their technology, business models, and partnerships. It then identifies which ones have the greatest potential to impact vehicle production and monetization in the future. The regional differences between new and emerging OEMs from China, Europe, the U.S., and other regions are thoroughly assessed.

### COVERAGE



GLOBAL



NA



CHINA



EUROPE

### FREQUENCY



ANNUALLY



QUARTERLY



ONE-OFF

### PUBLICATION FORMAT



PDF



POWERPOINT



EXCEL



ONLINE

### PAGES



90

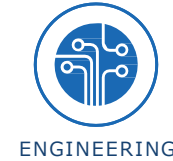
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## Key questions answered

- > Which new OEMs have the greatest potential to disrupt how cars are made or monetized?
- > Which companies are partnering with disruptor OEMs?
- > How mature are the technologies and business models being developed by disruptor OEMs?
- > What regional differences are emerging between new OEMs from China, Europe, USA and other regions?

## This research supports

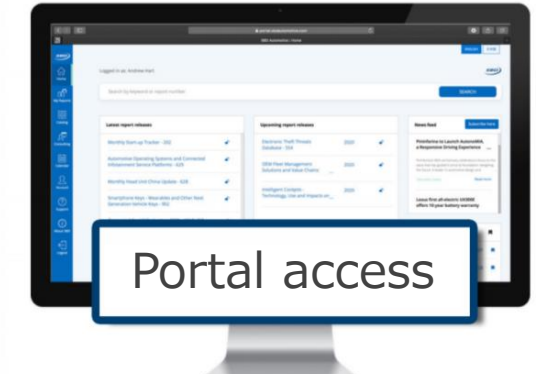


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# Excel Database Includes

#211/Disruptor OEM Guide



Disruption Log										
Company		Disruption		Status	Launch year	Launch vehicle	Category	Sub-category	Image/Video link	Assessment
Apple		No steering wheel and no pedal		Planned	2025	TBD	Experience	Use	<a href="#">Here</a>	5 3 15
Apple		Expected to opt for in-house chipset development		Planned	2025	TBD	Technology	System on Chip	<a href="#">Here</a>	2 2 4
Apple		Innovative battery design		Planned	2025	TBD	Technology	Battery	<a href="#">Here</a>	3 1 3
Apple		Offering a software-defined vehicle		Planned	2025	TBD	Technology	Dynamic Software Stack	<a href="#">Here</a>	4 2 8
Aptera		1,000 mile range		Planned	2022	Aptera	Technology	Battery	<a href="#">Here</a>	5 2 10

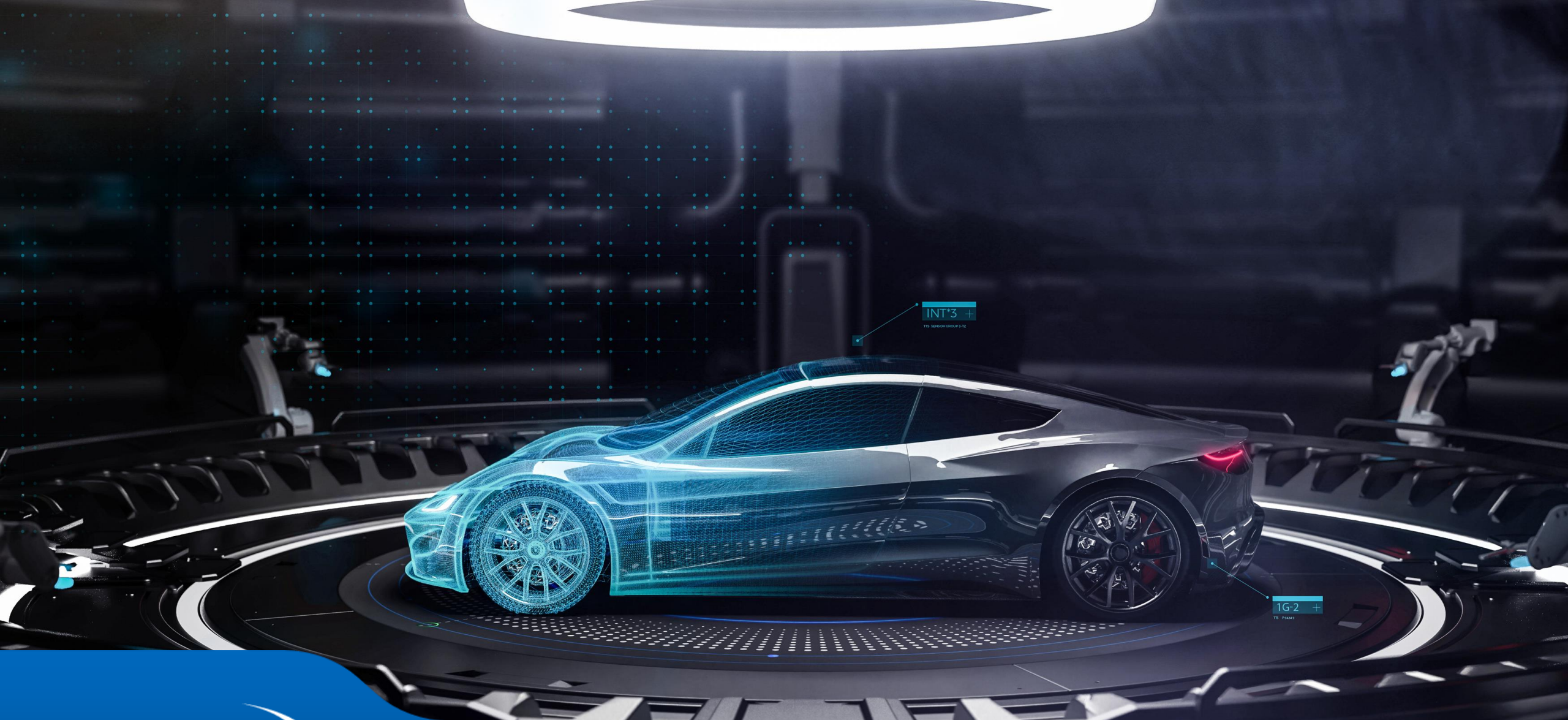
Partnership Log																																			
			Type of partnership				CASES Analysis					Experience							Technology								Business model								
Company	Partner	Reason for partnership	Joint Venture	R&D	Proof of Concept partnership	Product development	Connected	Autonomous	Shared Mobility	Electric	Secure	Explore	Purchase	Onboard	Load/Storage	Use	Park	Charge	Maintain	Repair	Battery	Renewable Materials	Communication (5G, Edge, V2X)	Sensing Hardware	System on Chip	E/E platform	Vehicle Platform or 'OS'	Dynamic Software Stack	Design	Manufacturing	Partnership model	Supply chain model	Annual/monthly payment	Contract manufacturing	Pay by usage
Apple	Volkswagen	Apple Self-driving car		Y				Y								Y								Y											
Apple	CATL and BYD	Talks for battery supply			Y					Y											Y														
Apple	LG Magna	LG Magna e-powertrain			Y					Y																Y									

Investment Log																																	
			Nature of investment																Type of investment		CASES Analysis				Experience								
Investing company	Invested in who/what	Description	Financial investment	Financial investment value (USD)	Manpower investment	Number of people	Infrastructure investment	Infrastructure investment value (USD)	Acquisition	% of stake by investing company	Connected	Autonomous	Shared Mobility	Electric	Secure	Explore	Purchase	Onboard	Load/Storage	Use	Park	Charge	Maintain	Repair									
Apple	Finisar	Finisar is a company focused on fiber optic subsystems and network performance test systems.	Y	390 million					y	Unknown	Y									Y													
Apple	II-VI	II-VI develops precision products such as infrared optical components and laser-related products for the automotive industry.	y	410 million					y	7%		y																					
Apple	Didi	Apple invested on a funding round of Didi, a Chinese ride-hailing service	y	1000 million					y	5%			y							y													

Excel Data Points:  
5,000+

New Companies in  
Automotive Covered:  
17

Excel Tabs:  
3



March 2022

## Disruptor OEM Guide



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Total number of pages - 90

# Example slides from the report



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# Five key trends that are defining disruption in the automotive

Quick to market	01	<b>Product time to market</b> Shifting from long to short	New entrants do not have the burden of protecting legacy architecture, giving them a blank page start to create skateboard platforms. EV only focus together with limited platform gives them advantage to evolve and adapt quickly to market competition	Close to 100,000 sales in 3-4 years
Numerous disruptors	02	<b># of disruptors</b> Growing from one to many	With changing automotive and mobility landscape, OEMs are being challenged by multiple new entrants such as tech giants, manufacturing giants and start-up OEMs, pushing them to compete against multiple dimensions	8 new players established in last 5 years
Regional shift in innovation	03	<b>Regional push</b> Many Asian-led OEMs	Over 50% of new entrants identified are Asian players who are likely to initially focus on specific market and specific vehicle segment. Over time some of these players could potentially expand to different regions	10 out of 17 new entrants are Asia based
Ambiguous ecosystem	04	<b>New entrant role</b> Less clarity in the ecosystem	As the ecosystem evolves, deep pocketed firms like Huawei, Xiaomi, Foxconn and Sony are eager to become OEMs as well as suppliers focusing across the value chain. This pushes established OEMs to compete as well as work together with some competitors	4 tech-giants eager to become an OEM
Changing expectations	05	<b>Competitive offering</b> New mainstream player offer innovative unique features	New mainstream OEMs are being fast to bring new experiences and technologies, changing expectations and making them as attractive as premium cars	Xpeng P5 is tech-oriented mainstream EV

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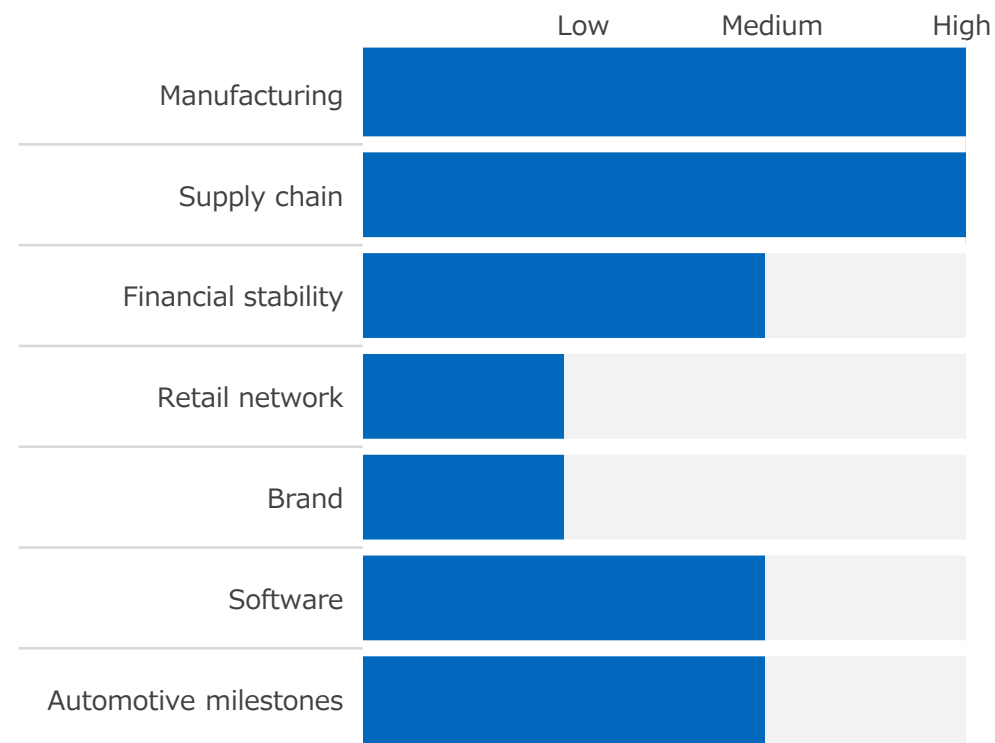
Faraday Future



## Current level of disruption



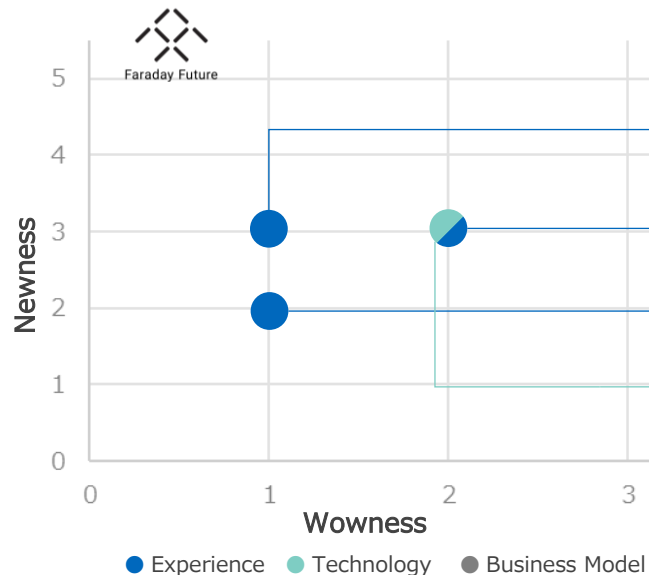
## Capabilities





## What makes them unique?

- Faraday Future's offering only includes electric vehicles but targeting multiple segments and multiple use cases. The brand aims to offer Ultra premium electric vehicles for personal use in 2022 as well as providing last mile delivery vehicles by end of 2023.
- The brand seems to adopt different strategy for their two main markets – USA manufacturing plant for vehicle sales in USA while choosing to opt for contract manufacturing for vehicle sales in South Korea.



Note: Only the 4 most relevant disruptions shown. For a full list, please access the accompanying Excel document.

A 27-inch screen drops down on the inside from the center of the roof, just behind the headrest of front seats, providing a tv style screen for rear passengers



Seats with 60° recline with high comfort. Faraday Future states it has the most leg room in its class



Platform between Faraday Future's workforce and consumers to work together and build better products. Some members (called FPOs) are invited to exclusive experiences with FF products and provide feedback on not launched products.

FPOs are rewarded based on the quality of the ideas received in the co-creation process. The reward includes awesome FPO titles to brag about on the FF App, Growth value and Co-creation points, and even future use of FF vehicles.

Faraday Future has a patented battery design with all major battery components submerged in coolant, improving battery safety, extending life and increasing energy density



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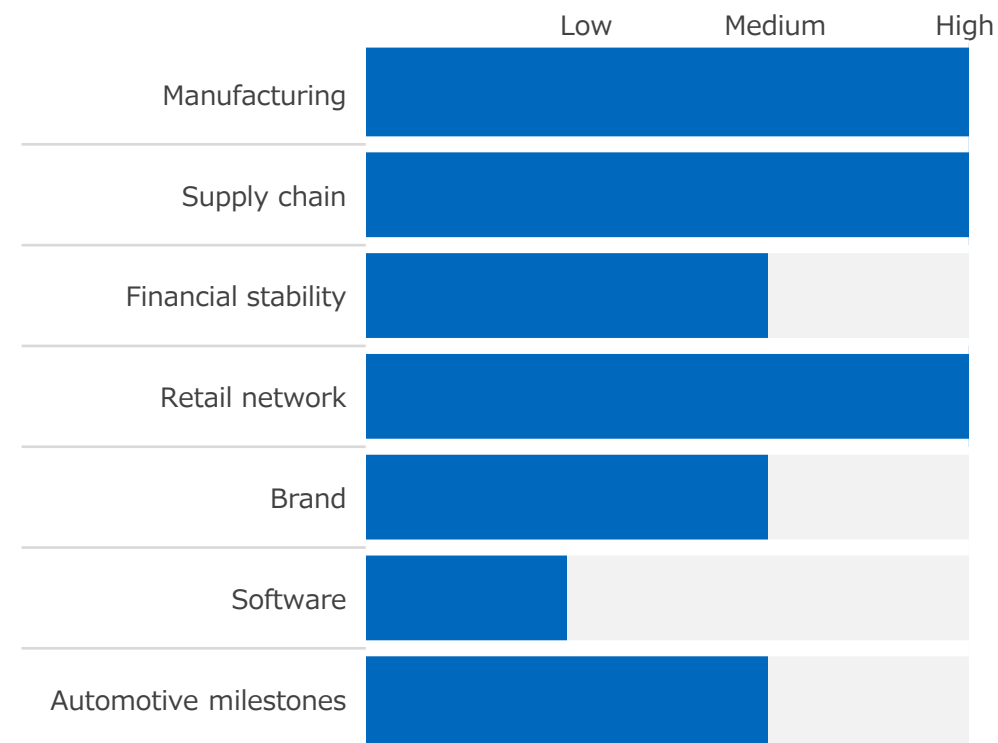
LUCID



## Current level of disruption



## Capabilities





Apple

Aptera

Faraday Future

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HiPhi

Huawei

Li Auto

Lightyear

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NIO

NiuTron

Rivian

Sony

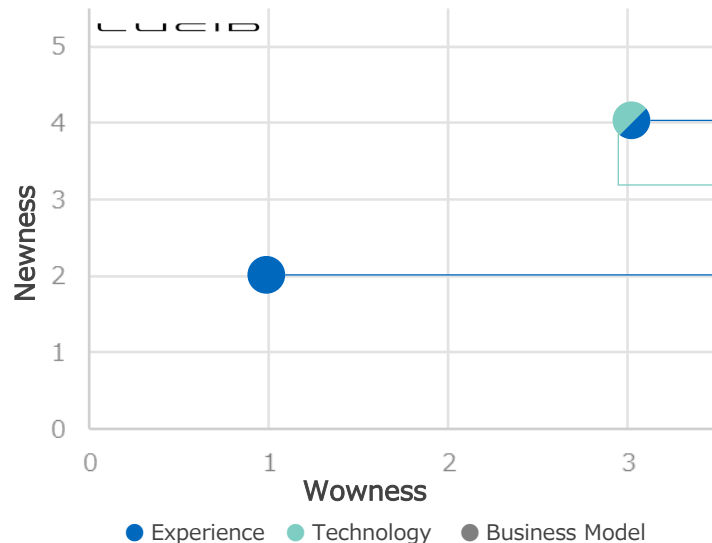
VinFast

Xiaomi

Xpeng

## What makes them unique?

- Lucid's background as battery manufacturer for E-racing together with their partnerships on battery development, is likely to enable them to provide a strong offering especially with regards to battery range. The Lucid Air model offers a range of 520 miles per battery charge.
- The brand places a strong emphasis on technology, enabling its vision to deliver on luxury electric vehicles offering intuitive user experience.



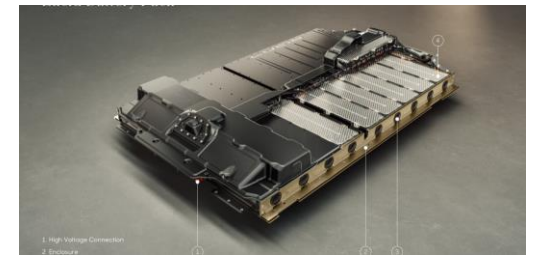
Able to charge up to 300 miles of range in about 20 minutes (When connected to DC fast chargers)



Lucid plans to distribute directly to consumers



With 900V+ architecture, it's the fastest EV charging system available



Note: Only the 4 most relevant disruptions shown. For a full list, please access the accompanying Excel document.



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