



Silicon Valley and New Mobility

Overview trends and players

SPUR Lunch Discussion

San Jose, CA | November 2, 2017

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The future of the automobile is automated, connected, electrified, shared – those 4 trends are building on one another accelerating change

CONCEPTUAL

4 trends in personal mobility...



... are building on one another

Automation

Driving task taken over by vehicle, driver becomes observer and then passenger

Communication

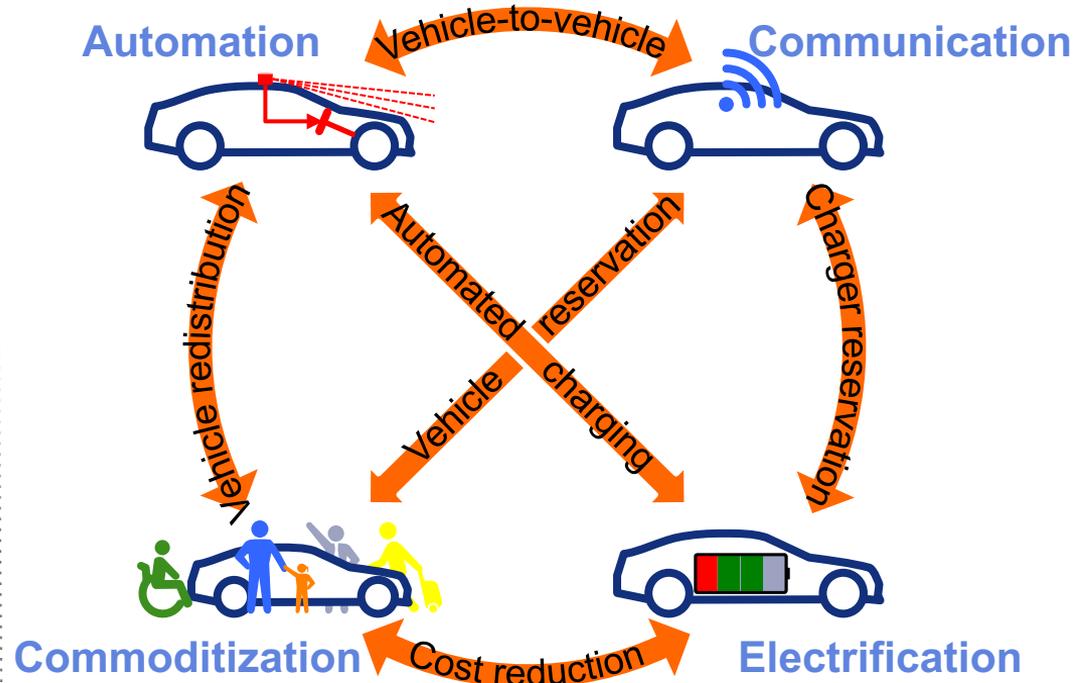
Vehicles exchange data with infrastructure and with one another

Electrification

Fossil fuel based powertrain gets replaced by electric components

Commoditization

Car- and ride-sharing offer new mobility solutions, change ownership model



As everyone seems to agree on the 4 trends and the necessary change, the same questions keep coming up over and over again and deserve a closer look



1. When will autonomous vehicles come to the market?



2. What is the business case for connected vehicles?



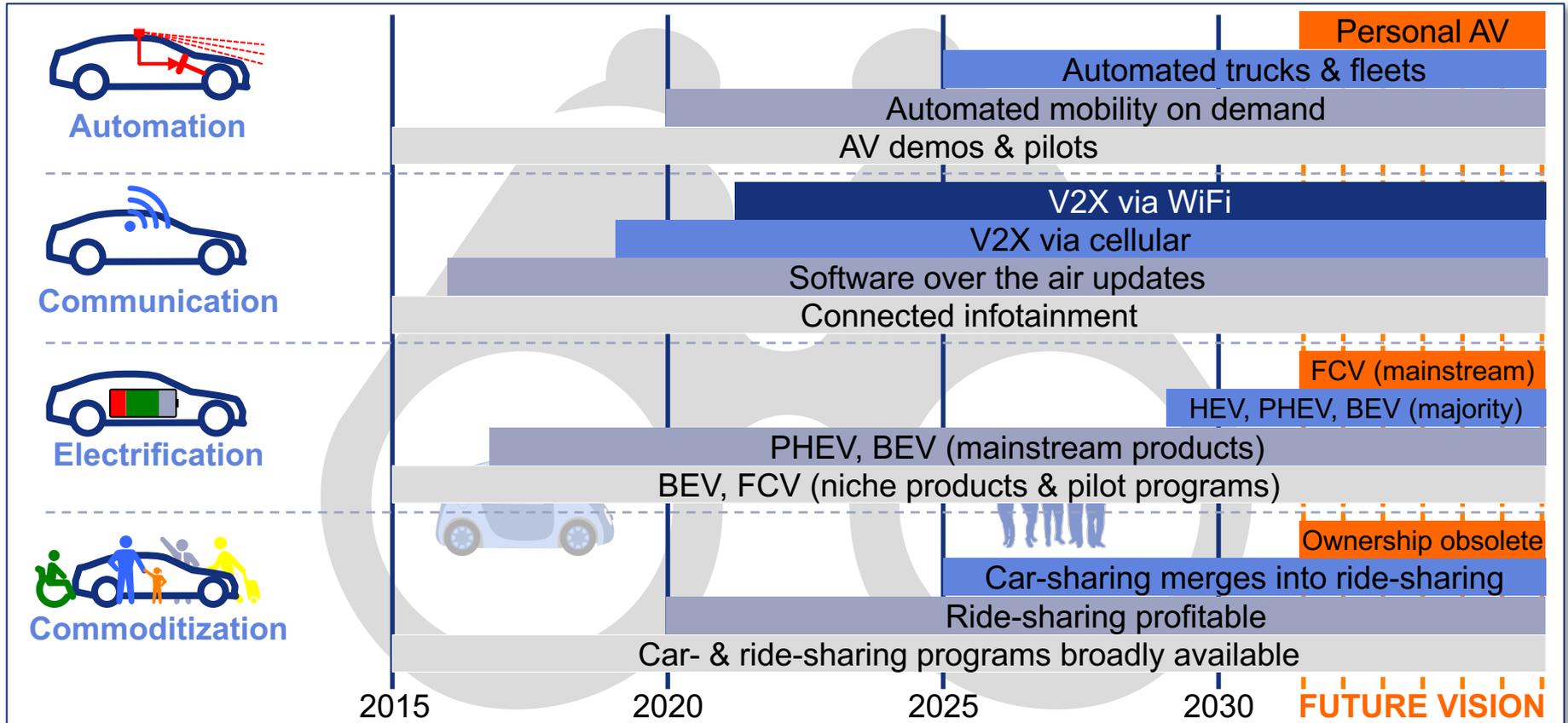
3. What is the inflection point for electric vehicles?



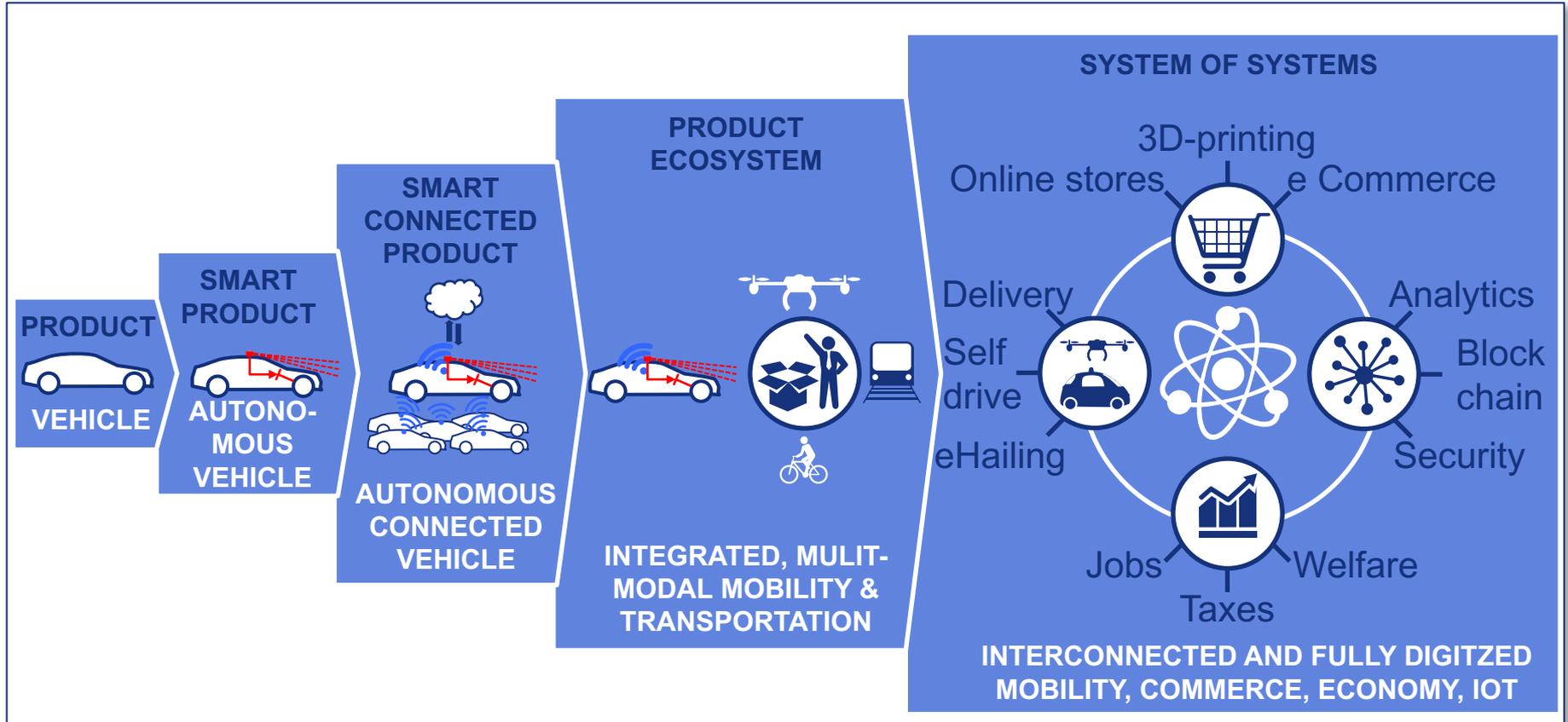
4. Will consumers only share but not own vehicles?

Taking everything together, we can determine for each trend short- and long-term developments, some will remain a future vision

CONCEPTUAL



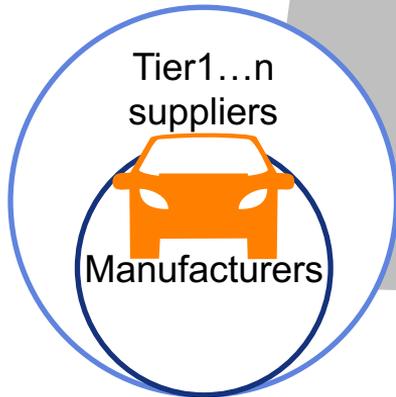
Through automation and connectivity the automobile becomes fully integrated in the mobility ecosystem and ultimately of the interconnected digital economy



The industry ecosystem is expanding with new players moving in and claiming their market share; partnerships will be a key factor for success

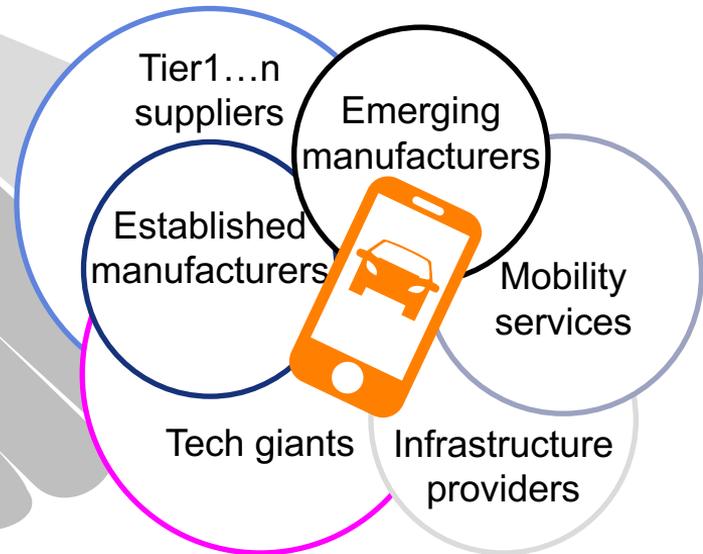
Today's automotive industry

- ❑ Internal competition
- ❑ Hardware manufacturers
- ❑ Vehicle focus



Tomorrow's mobility sector

- ❑ Coopetition and partnerships
- ❑ Service and infrastructure providers
- ❑ Mobility focus



Silicon Valley has established itself as one – if not the – center for new mobility solutions. Often it is hailed as “The New Detroit”, but what does that mean?

How Silicon Valley is inventing the future of cars

Legacy automakers, startups have made the Valley ground zero for innovation in the automobile industry

Fri, Jul 28, 2017, 6:54 am
by Eric He / Palo Alto Weekly



Is Silicon Valley the new Detroit for electric cars?

BY STEFANIE OLSEN
FEBRUARY 22, 2008 4:03 PM PST

Uber Has Apparently Ordered \$10 Billion Worth of Mercedes S-Class Sedans

That's a lot of expensive luxury cars for an app dedicated to undercutting local taxi prices.

BY BOB SOROKANICH
MAR 18, 2016



How Silicon Valley Spurred Bill Ford Jr. to Replace His CEO

MAY 22, 2017 AT 2:57 PM BY PETE BIGELOW



Tesla Hits a New Milestone, Passing G.M. in Valuation

By THE NEW YORK TIMES
APRIL 10, 2017



Lyft and Waymo Reach Deal to Collaborate on Self-Driving Cars

By MIKE ISAAC MAY 14, 2017



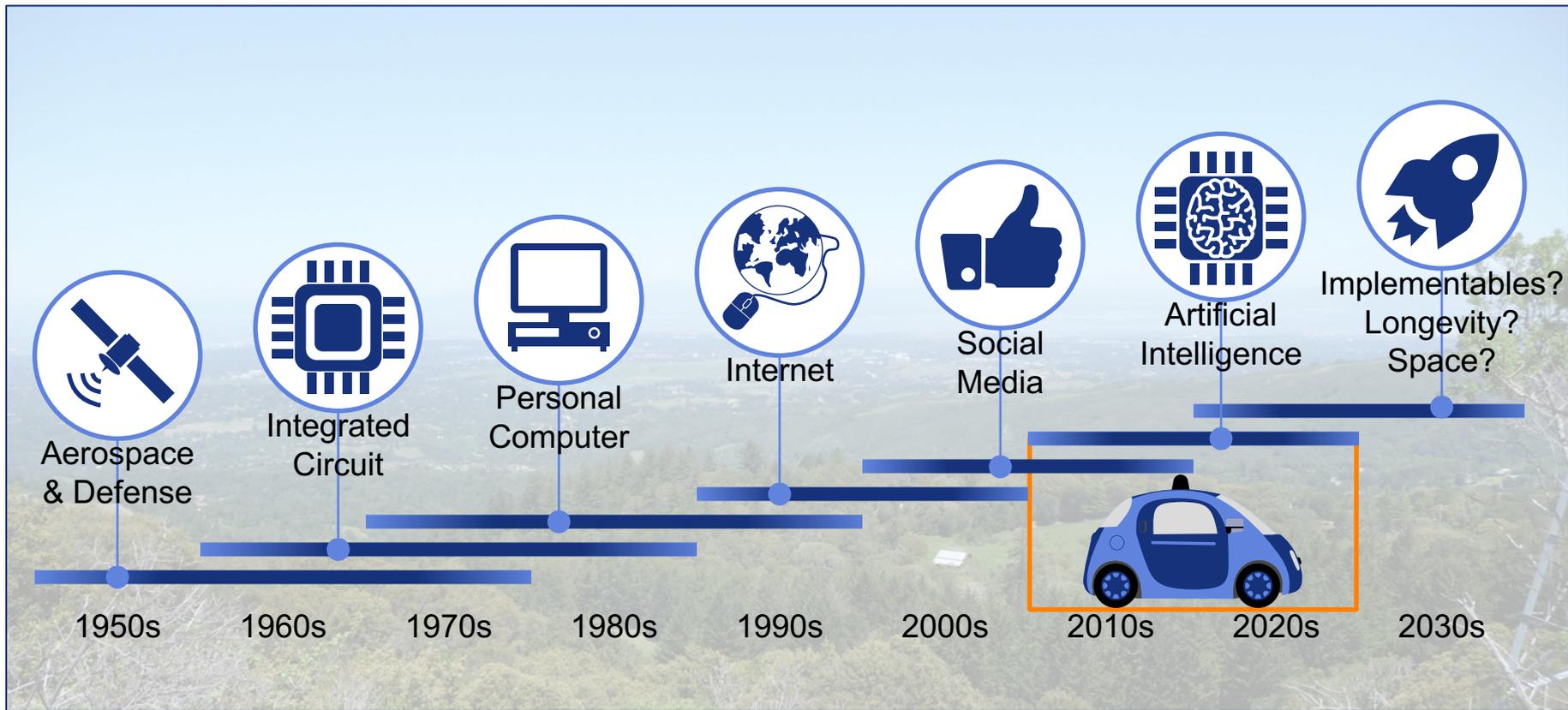
Google is to start building its own self-driving cars

28 May 2014 Last updated at 02:00 GMT

By Jack Stewart
BBC World Service Radio, Los Angeles



Silicon Valley is always on the lookout for the “Next Big Thing”, those trends have typically last about 2 decades, mobility is part of the AI trend



Silicon Valley is well know for its wealth of IT companies, mobility companies blend in





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