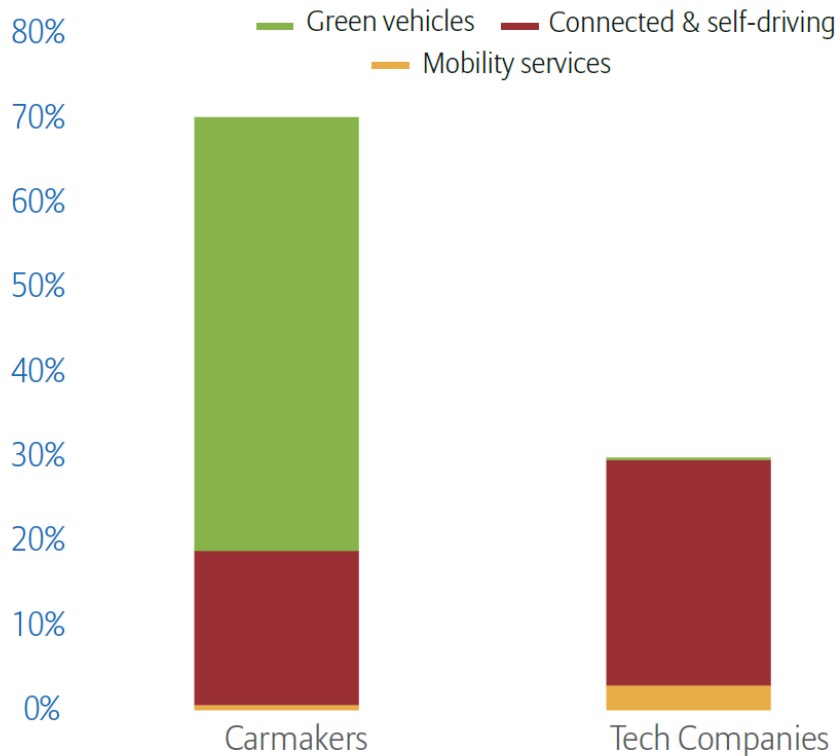


# Innovation: Tech Me if You Can

Carmakers and Tech companies: new technology patents (as % of total in the sector)



\*Carmakers (Audi, BMW, Daimler, VW, Tesla); Tech companies (Google, Amazon, Microsoft, Apple, Facebook, Uber)

While established players continue to dominate the **electric vehicles market**, major car companies face competition from tech startups, notably in the field of **connected and autonomous driving technologies**

Traditional manufacturers will need to sustain investments in software companies or establish partnerships with innovators