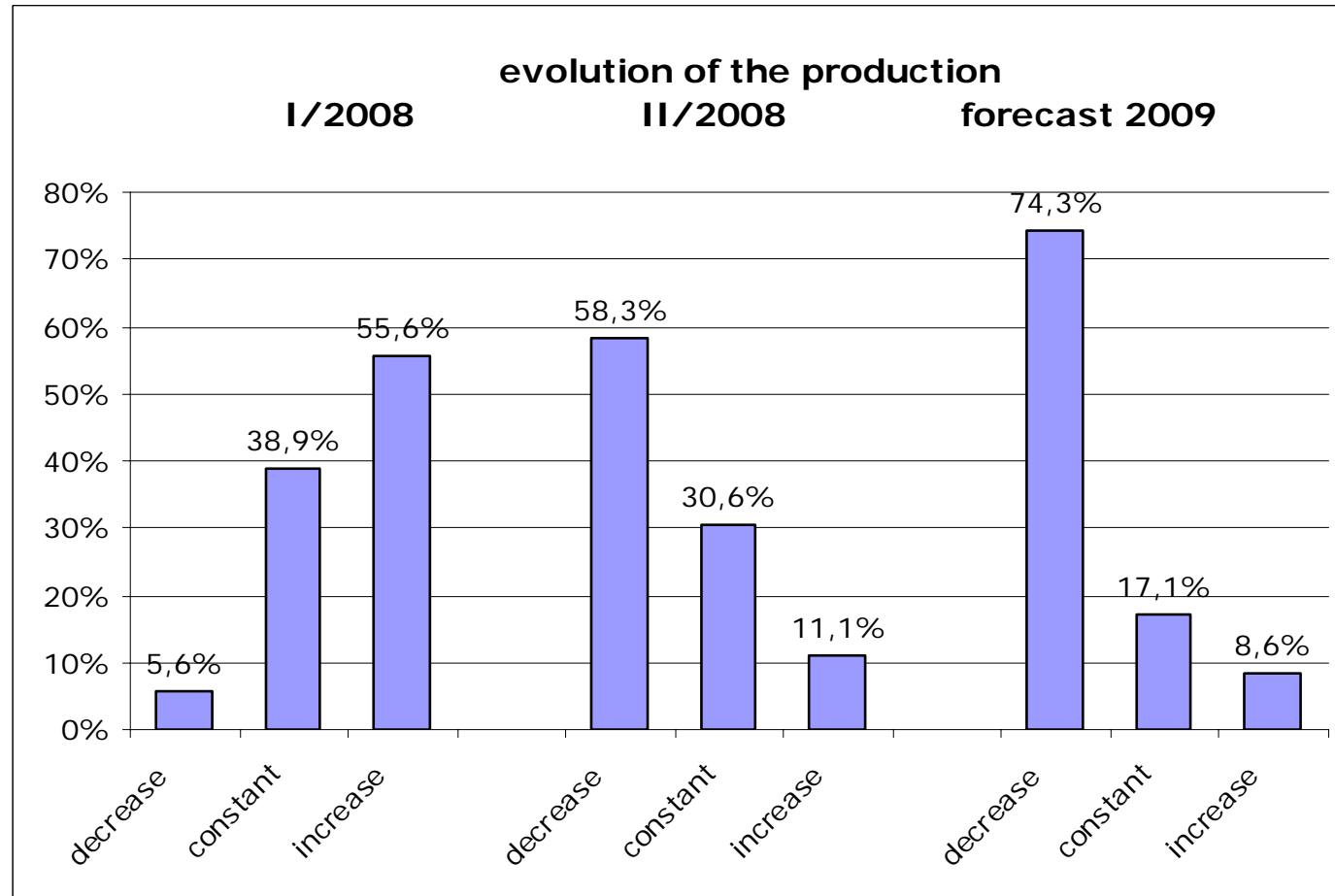


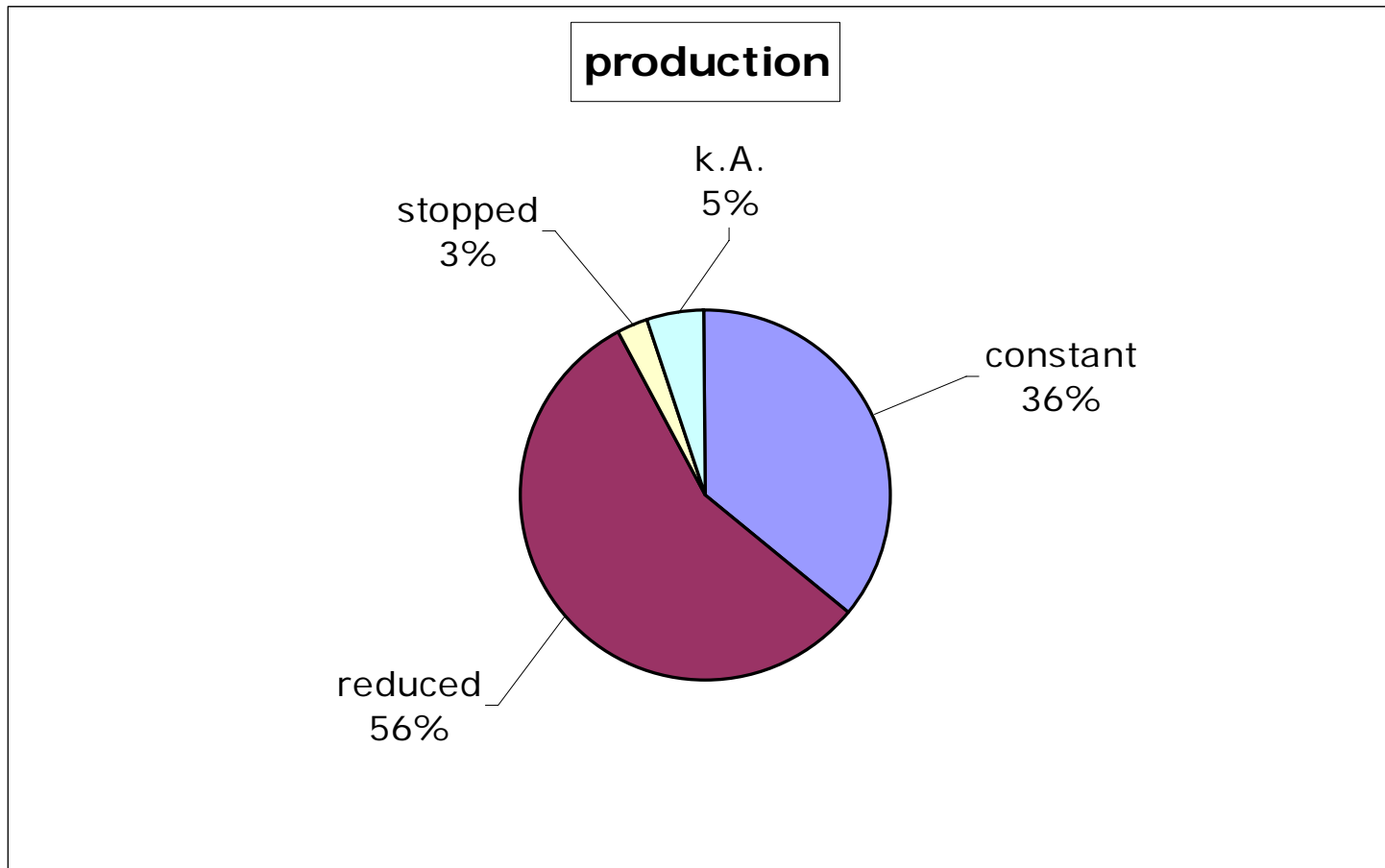
Some actual results of automotive research

The situation of the automobil-industry in Rheinland-Pfalz

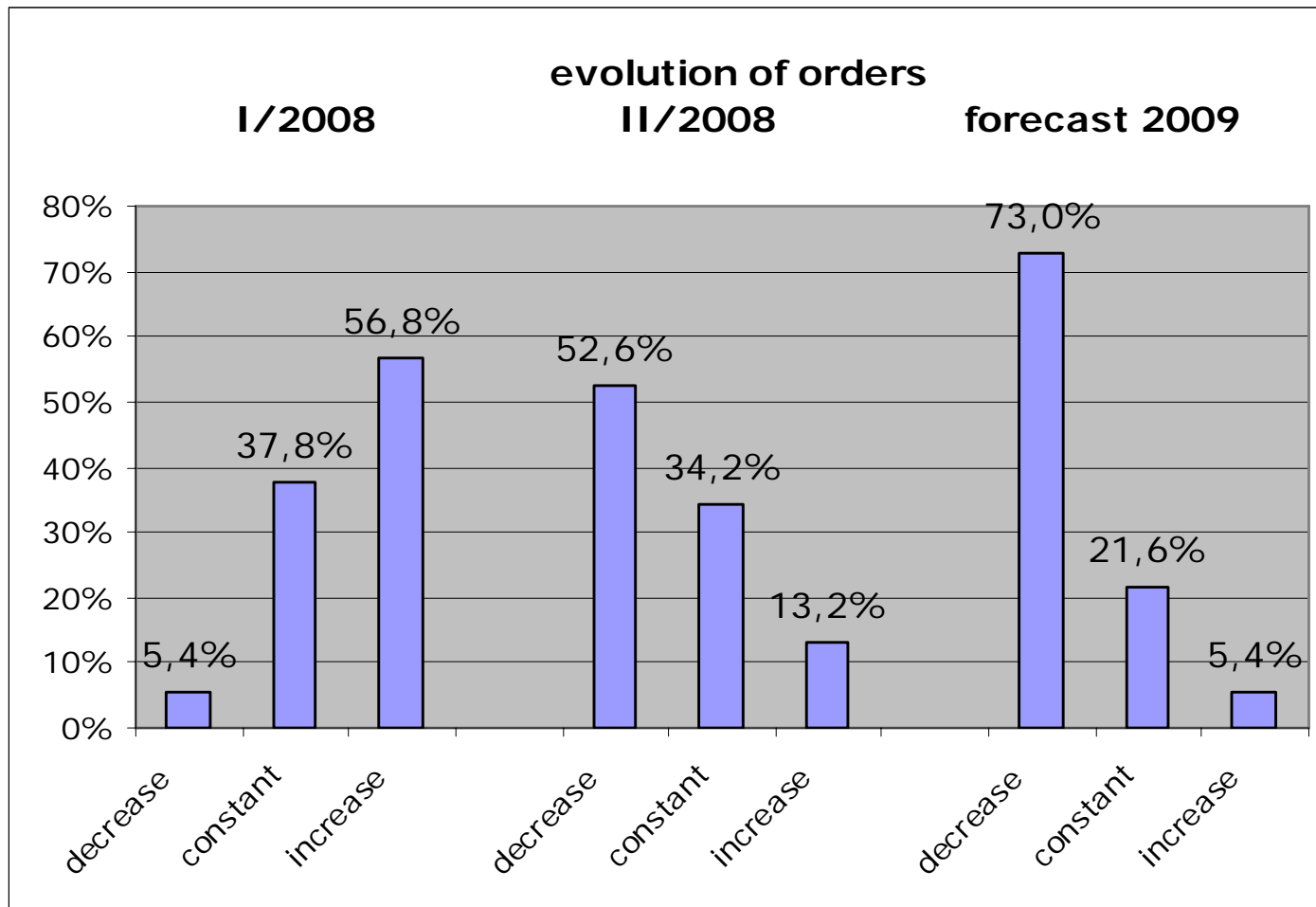
IMO-Report for the Ministry of Economics Rheinland-Pfalz



The situation of the automobil-industry in Rheinland-Pfalz
IMO-Report for the Ministry of Economics Rheinland-Pfalz

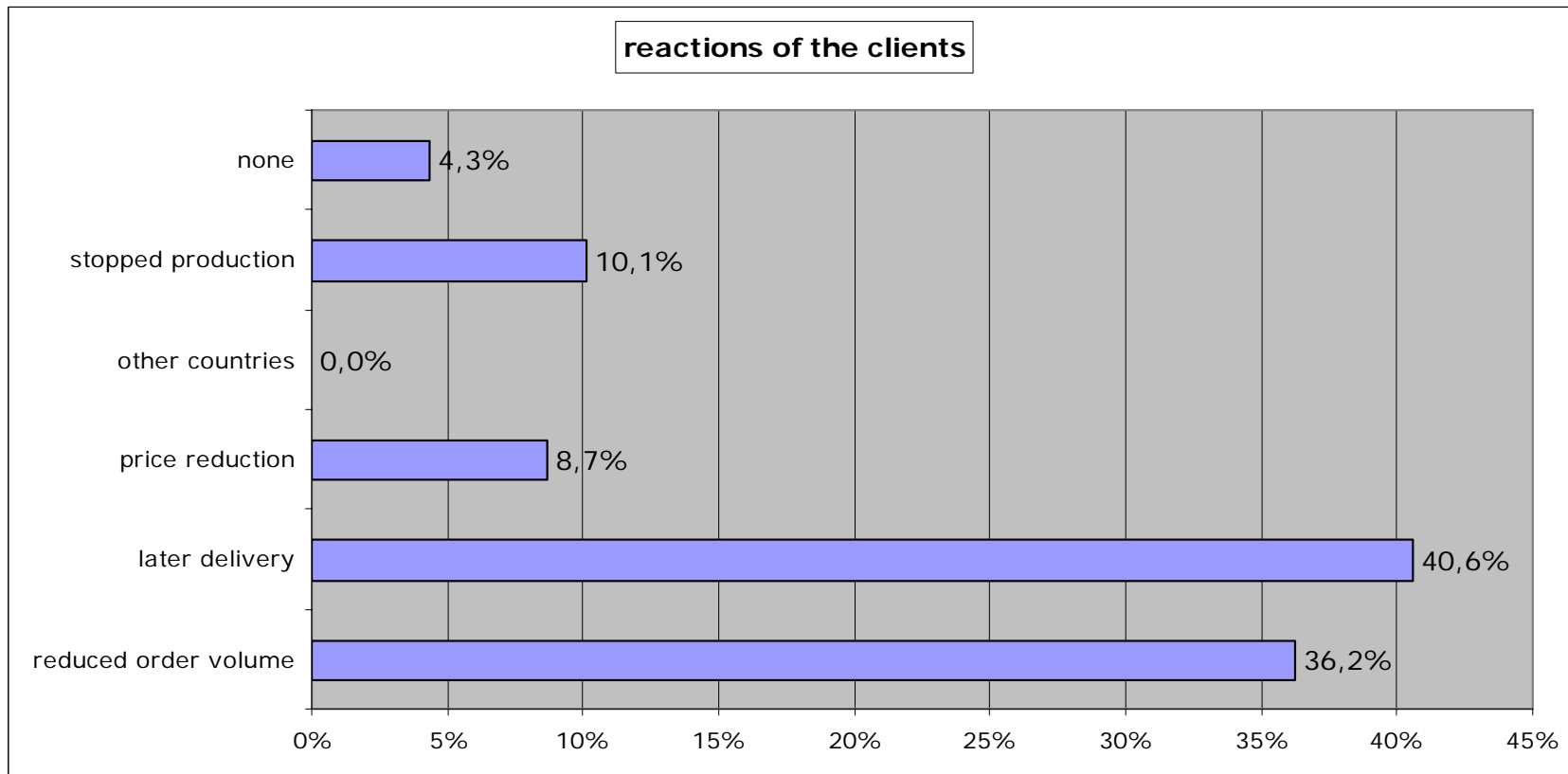


The situation of the automobil-industry in Rheinland-Pfalz
IMO-Report for the Ministry of Economics Rheinland-Pfalz

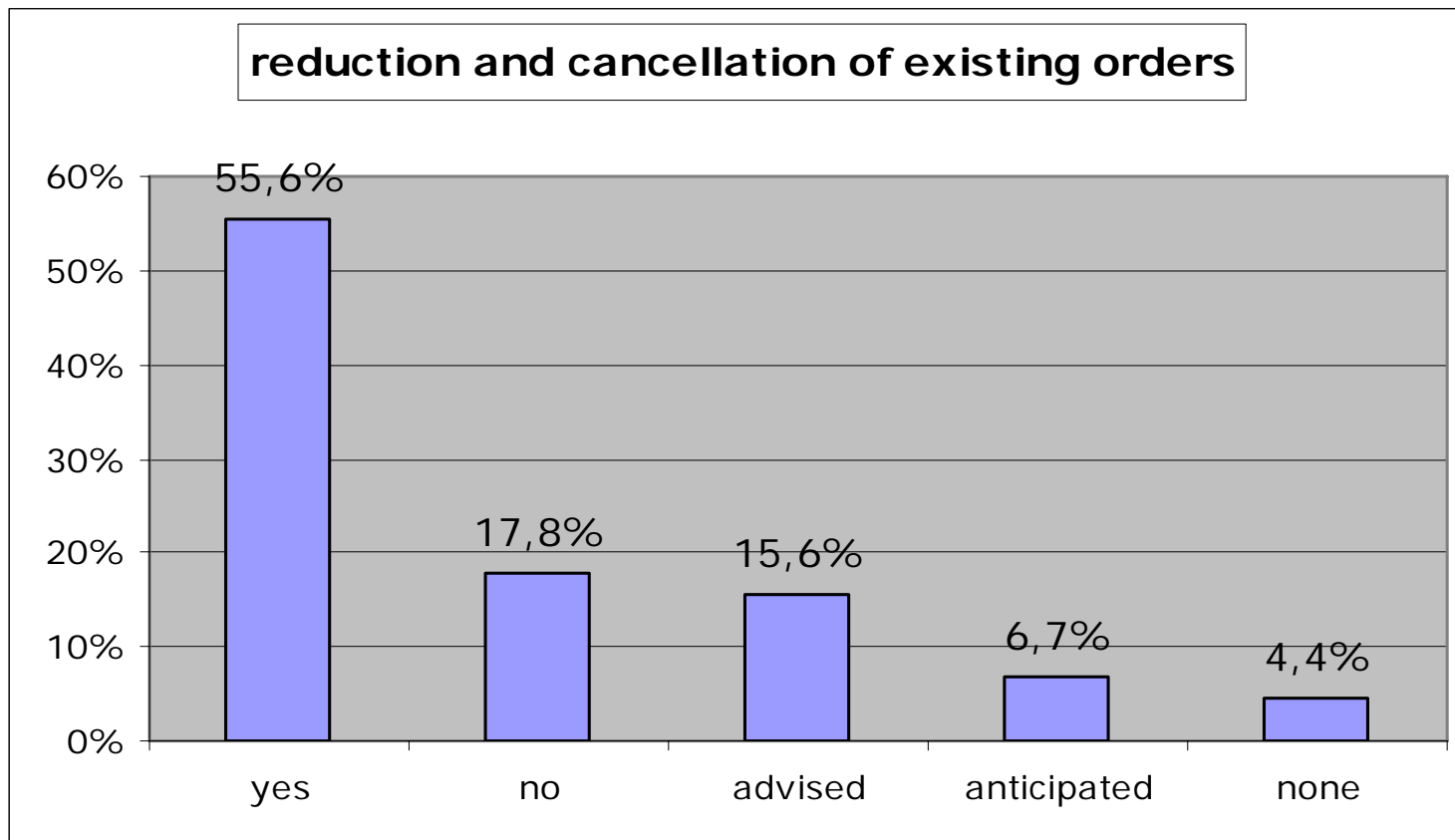


The situation of the automobil-industry in Rheinland-Pfalz

IMO-Report for the Ministry of Economics Rheinland-Pfalz

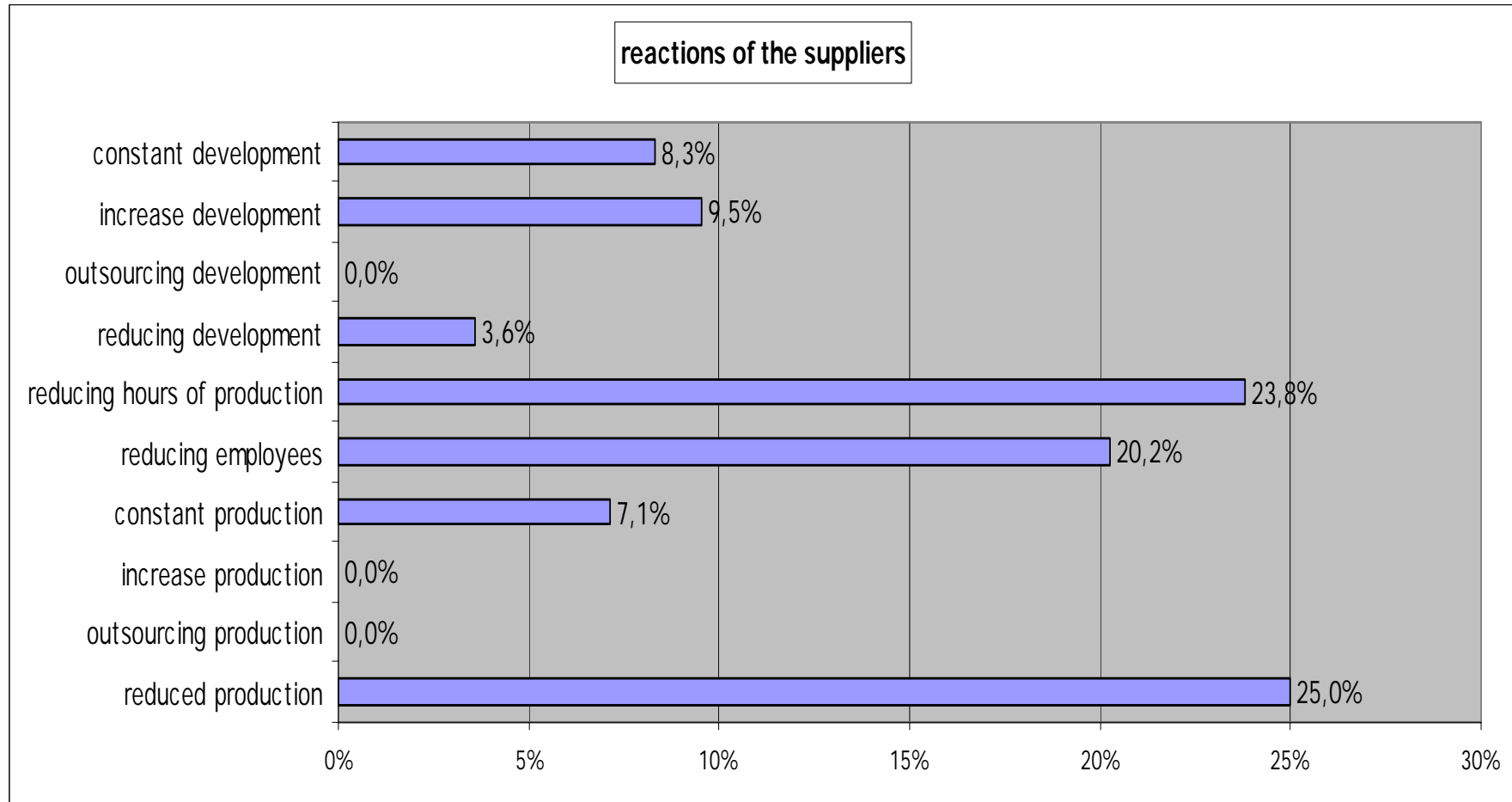


The situation of the automobil-industry in Rheinland-Pfalz
IMO-Report for the Ministry of Economics Rheinland-Pfalz

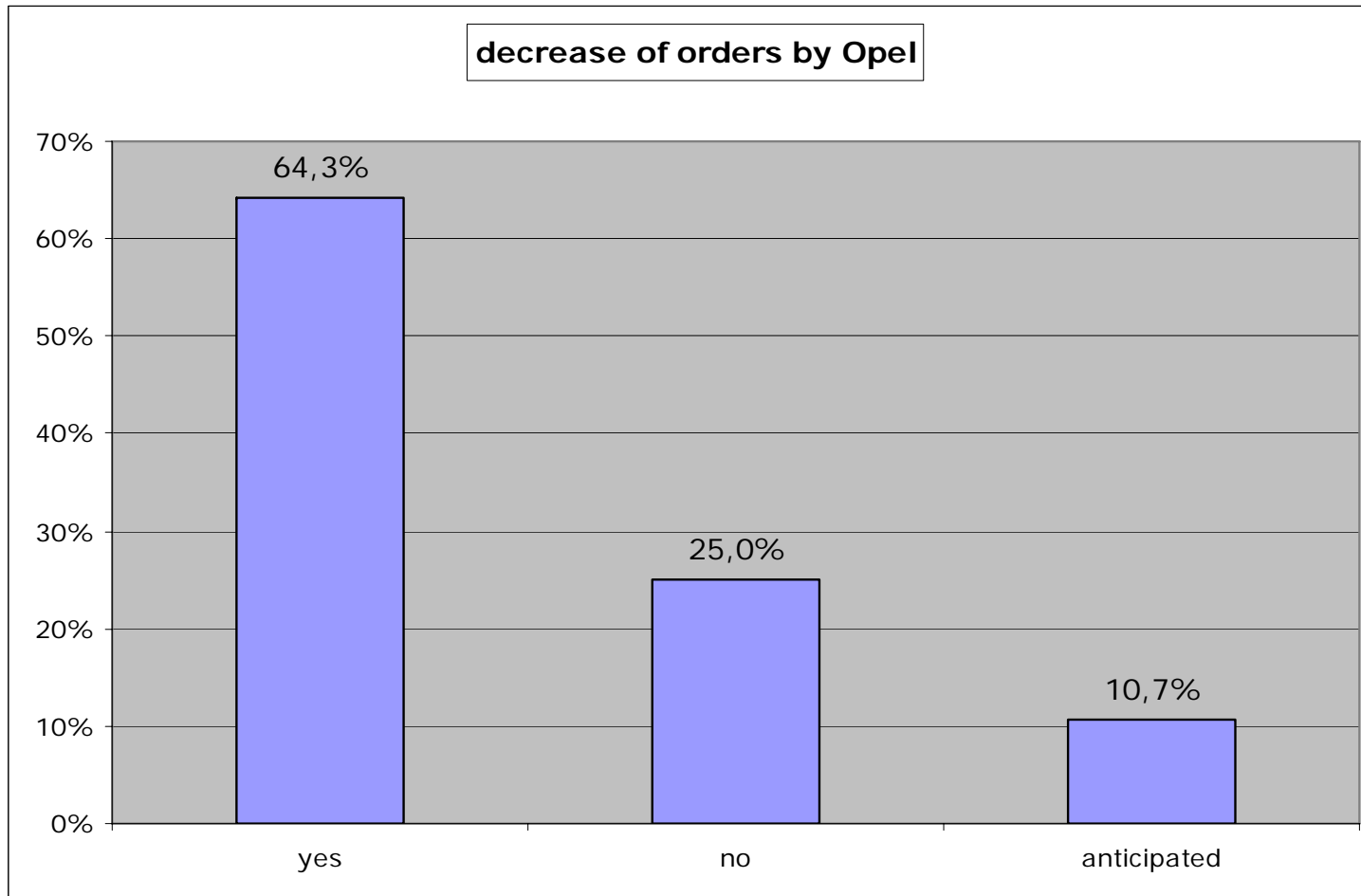


The situation of the automobil-industry in Rheinland-Pfalz

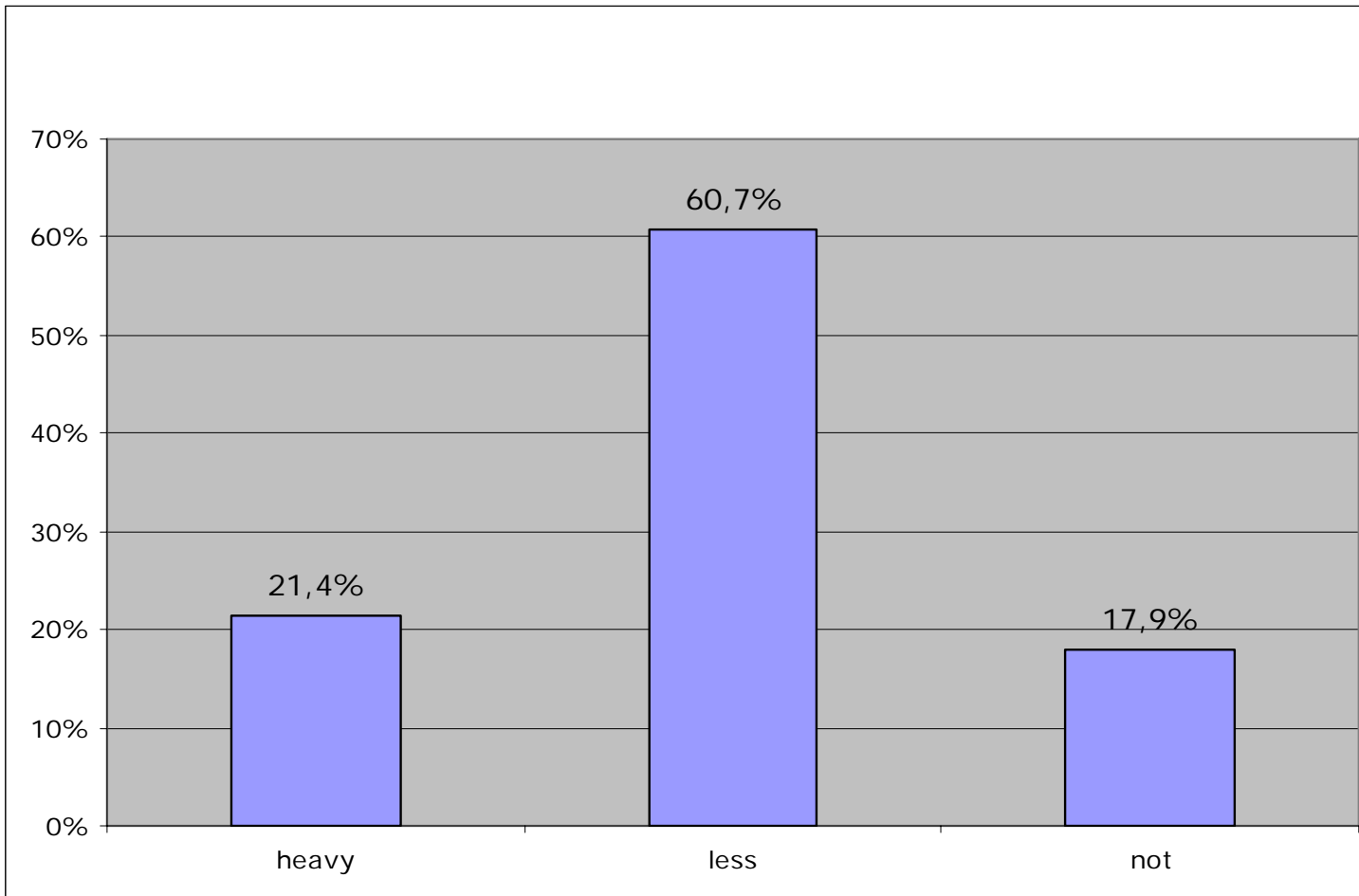
IMO-Report for the Ministry of Economics Rheinland-Pfalz



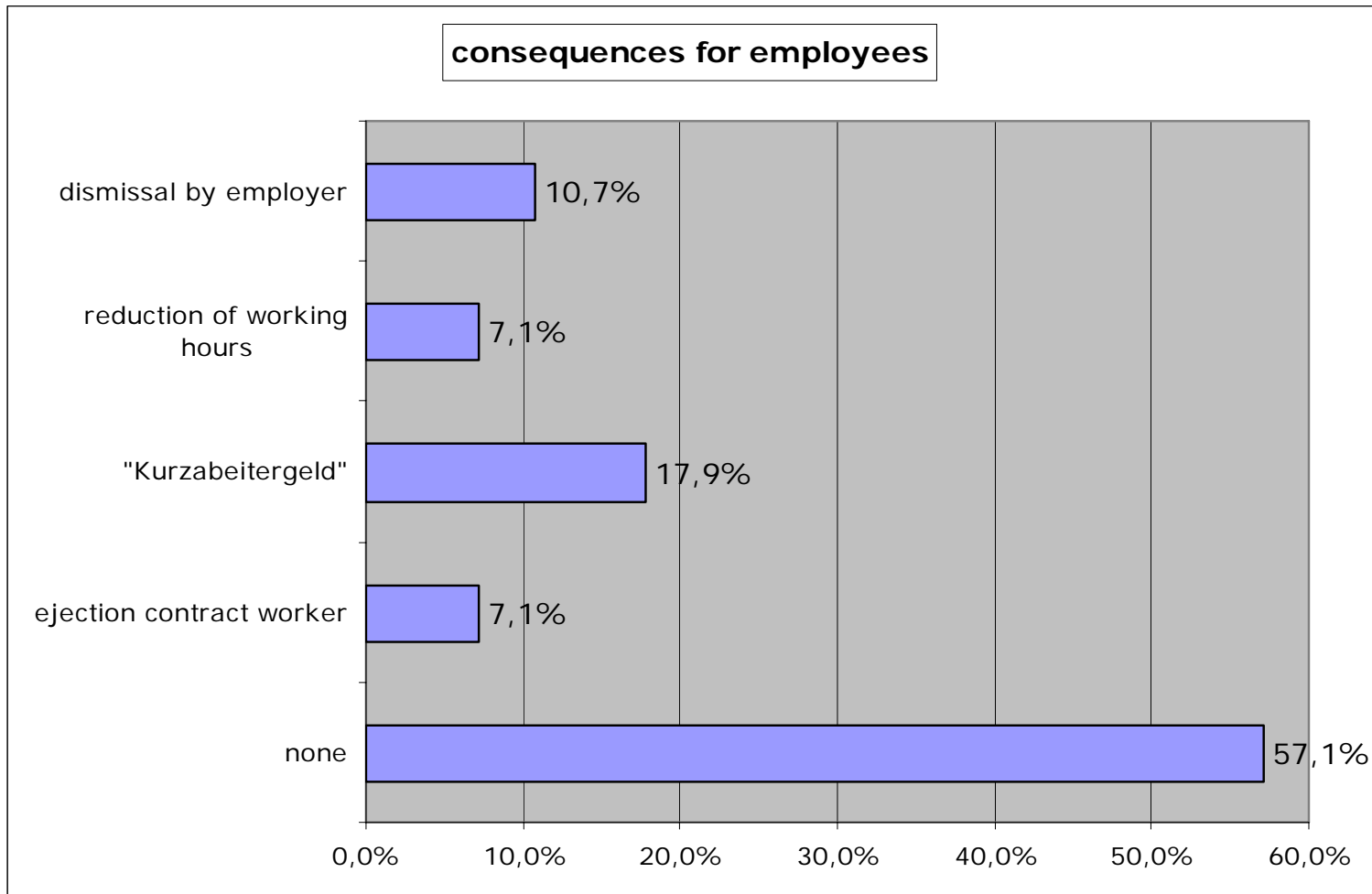
Impact for the suppliers because of the OPEL-situation
IMO-Report for the Ministry of Economics Rheinland-Pfalz



Impact for the suppliers because of the OPEL-situation
IMO-Report for the Ministry of Economics Rheinland-Pfalz



Impact for the suppliers because of the OPEL-situation
IMO-Report for the Ministry of Economics Rheinland-Pfalz



The German Automotive Crisis

- a combination of several crisis

1. Overproduction Capacity Crisis

- world and europe
- from 70% to 50%

2. Demand Crisis

- low income
- job insecurity
- tax uncertainty
- price structure

3. Financial Crisis

- global self-dynamic
- effects on real economy
- breakdown of economies
- fiscal bankruptcy

4. Market Dynamics

- old markets stagnation
- new markets reducing

5. Product Structure

- from big to small
- from power emission to zero emission
- from premium production to mass production

6. Production Systems

- selective utilization

7. OEM and suppliers

- bankruptcy of major OEM's
- fusion of suppliers
- fusion of OEM's
- entrance of Chinese and Indian OEM's in Europe
- new competitors by green cars

8. Political Intervention

- most powerful intervention since World War II
- intervention in markets and firms
- pollution regulation
- stimulating e-mobility products and infrastructure