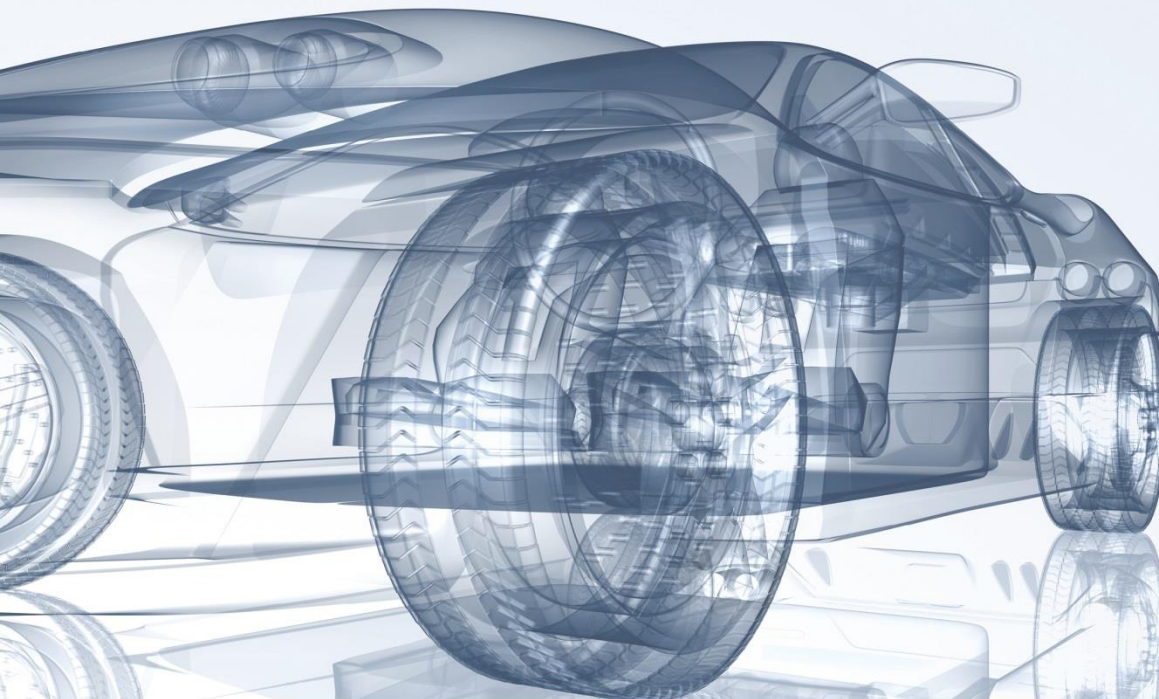


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Borderless World: 2.0

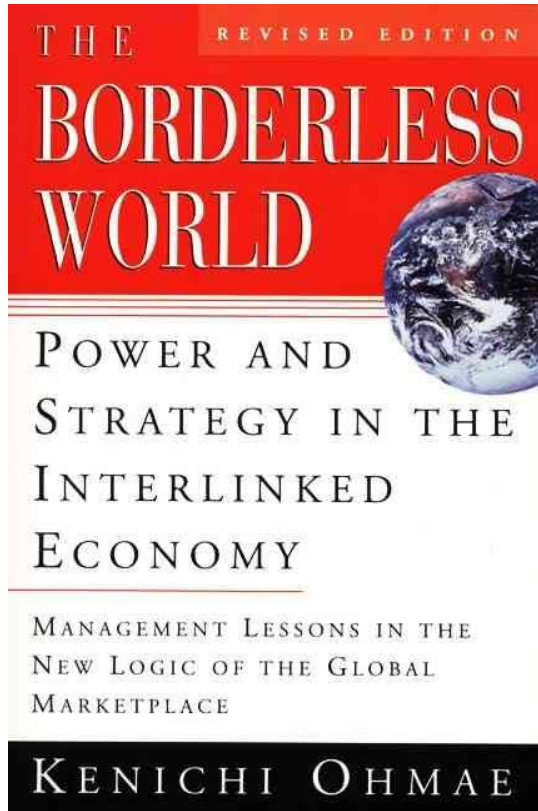
- EVS30 Symposium
Stuttgart, Germany,
October 9-11, 2017

Peter Wells

Liqiao Wang

Agenda

- **The new meaning of ‘borderless’**
- **Quasi-diagonal integration**
- **The creation of automobility archipelagos**
- **Conclusions**



Automotive industry

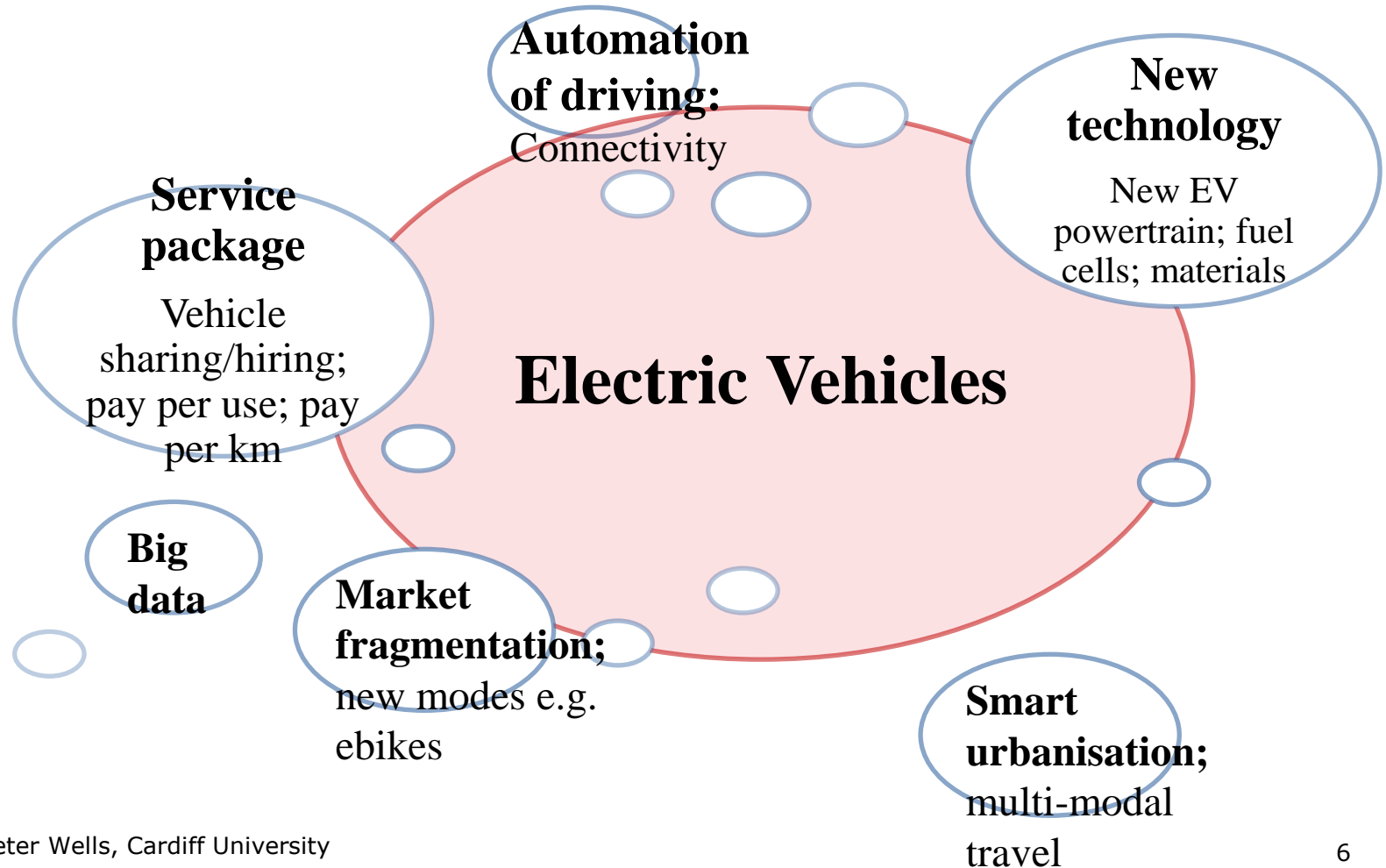
Making and
selling

Cars

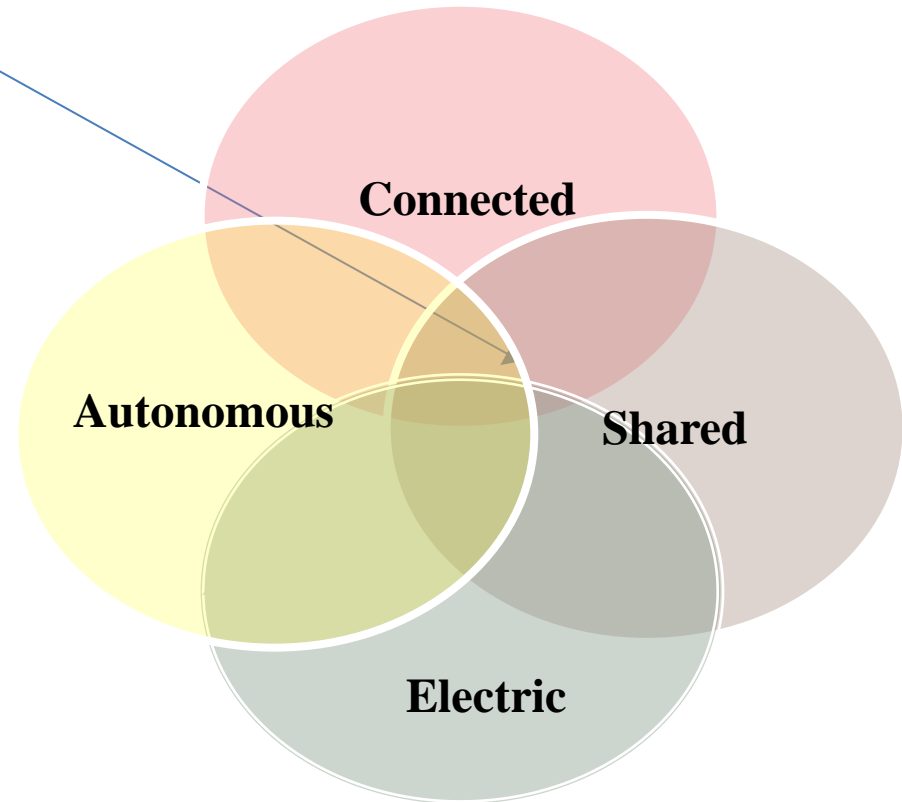
Automobility industry

Making and
selling

**Personal
mobilities**



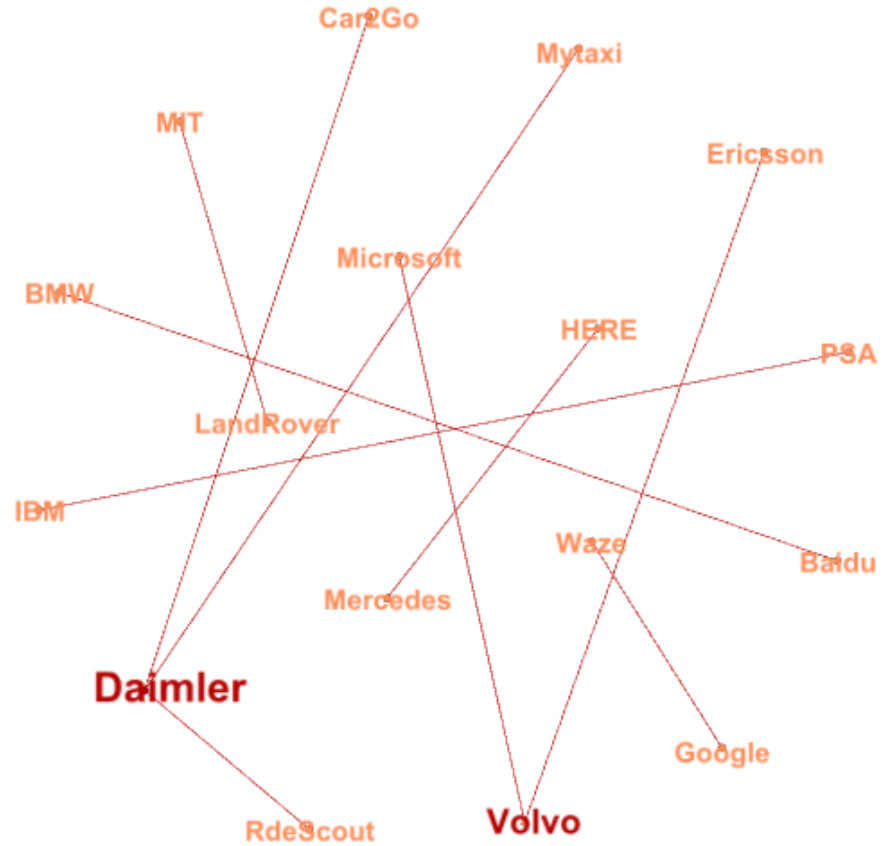
Automobility Services



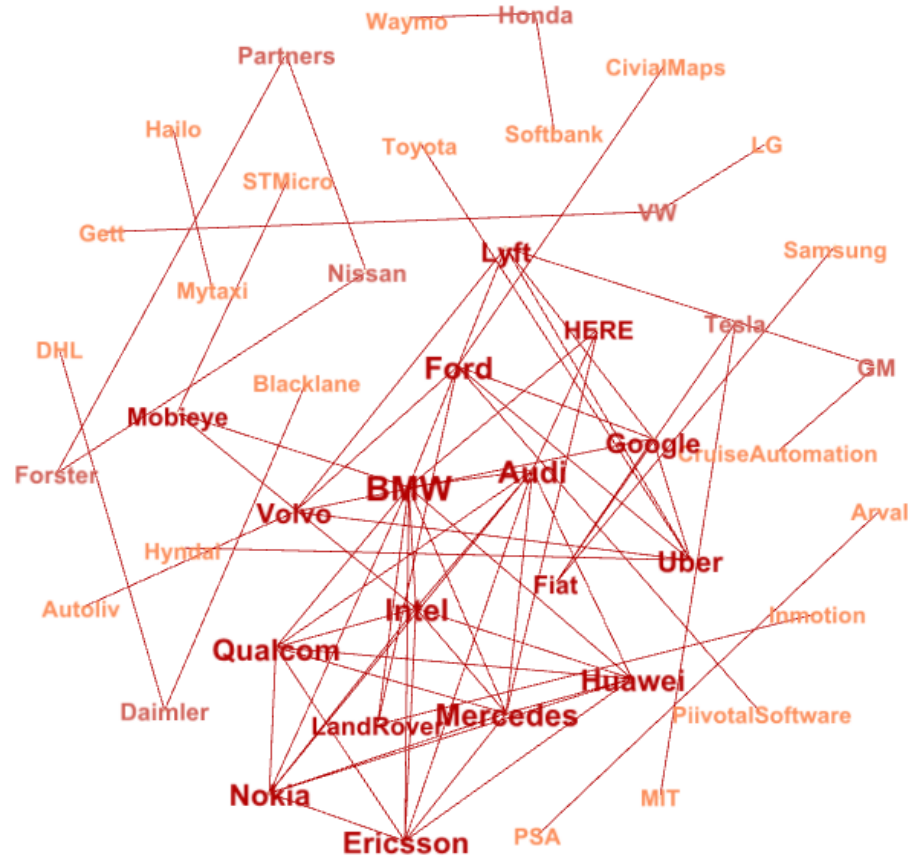
‘Quasi-diagonal’ Integration

- **Rapid but unstable**
- **Technical alliances, Equity joint venture and Cooperation**
- **Creating new archipelago structures of inter-locking interest**

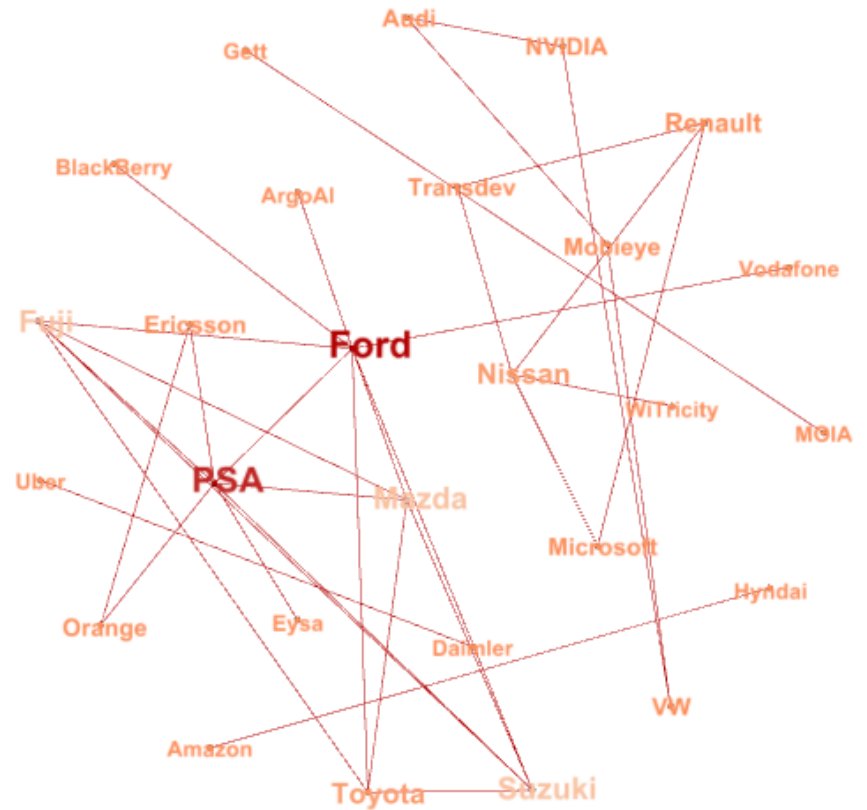
Before 2016



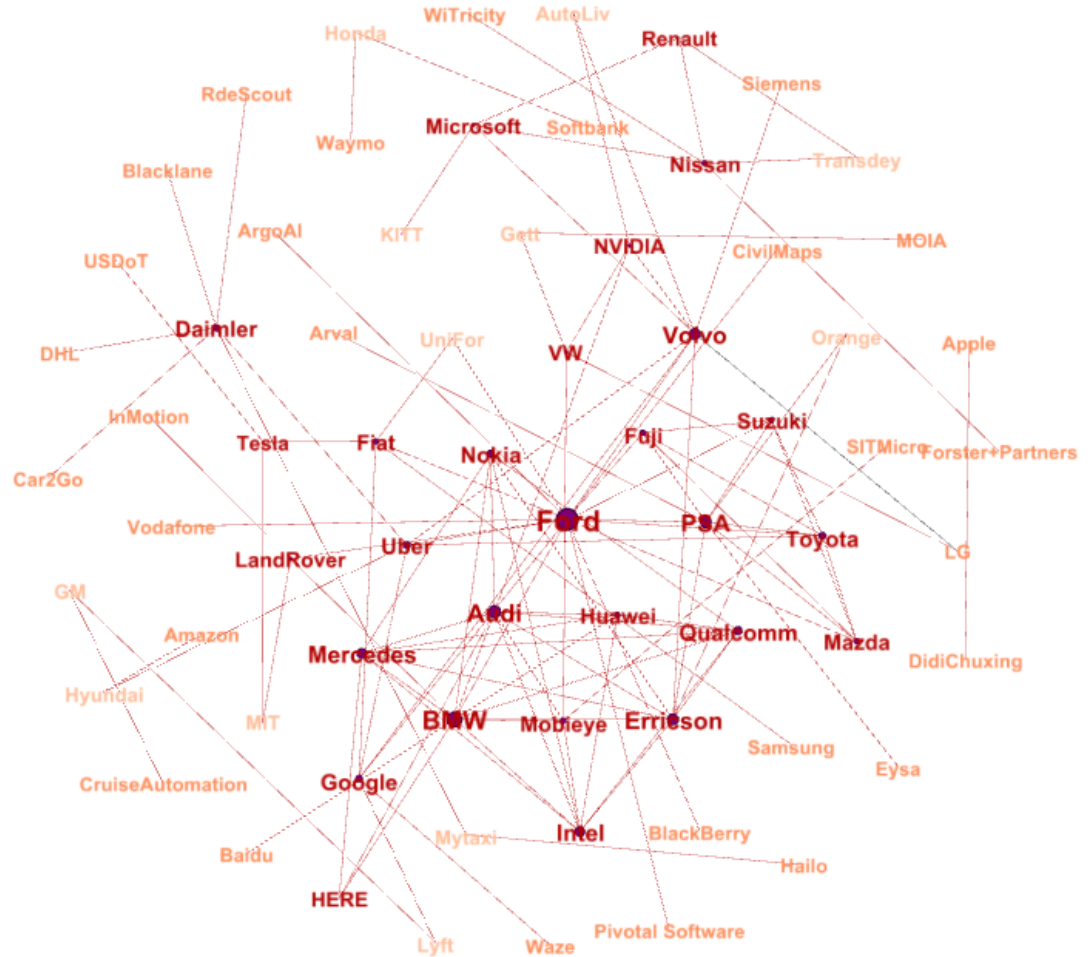
2016



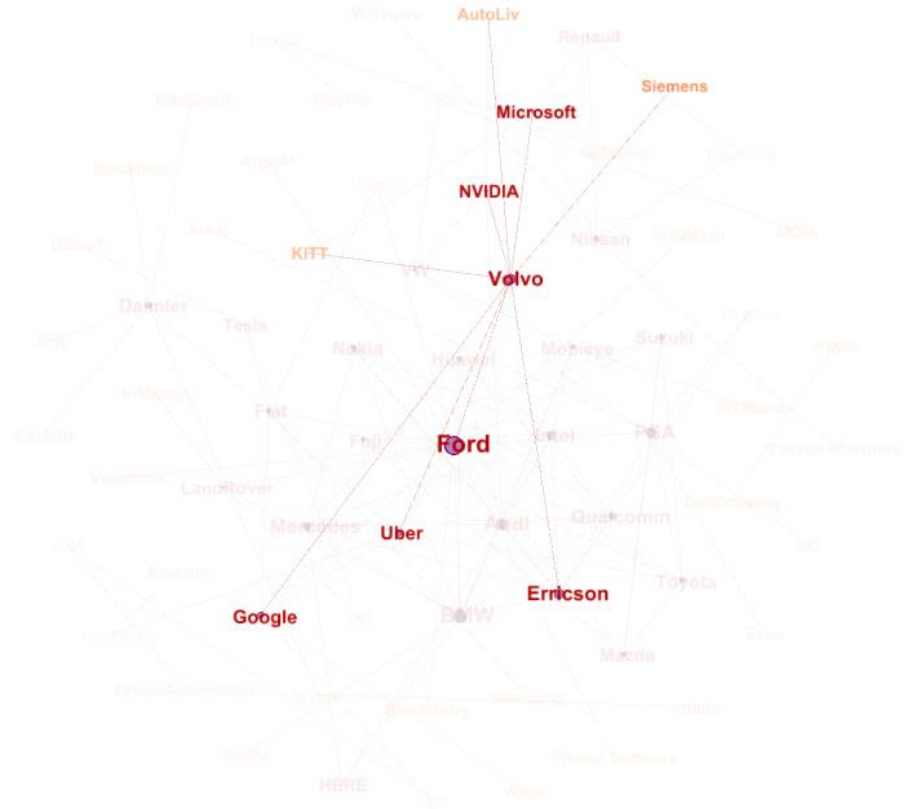
First 1/4 2017



2009 to 2017



Volvo Car relationships



Conclusions

- **QDI relationships emerge out of and are part of the process of creating shared cognitive framings**
- **May result in uncomfortable relationships e.g. Volvo (aiming for premium) and Uber (least-cost transit)**
- **Cultural differences may be hard to resolve: automotive (cautious; fully tested) versus Silicon Valley (beta test and go to market)**
- **The contemporary archipelago cannot be sustained**