Has the German automotive industry finally heard the wake-up call?

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From openness to technology to electromobility, on the status quo of German premium manufacturers. The first column by e-magazine editor Bernd Maier-Leppla for Innovation Origins.

If you had asked the CEOs of Germany's premium manufacturers three years ago about electric mobility, the answers (with one exception) would have been pretty evasive, if not downright dismissive.

No one at Audi, BMW, Daimler or Porsche would have believed in the triumph of electric cars. The only exception was VW boss Herbert Diess, who was persuaded early on to make a commitment in favor of the electric drive. This was presumably due to an important fact: the diesel scandal that had been smoldering since 2015.

Last week, both Herbert Diess of VW and Oliver Zipse of BMW presented their roadmaps for the coming years. What is striking is the partly radical change in views toward electric drive.

Not quite so euphoric

Herbert Diess even went so far as to make the following proclamation at VW's Power Day event: "Electromobility has won." At BMW in Munich, they are not yet quite so euphoric, because while VW, with its all-electric MEB platform, is already in position to produce more cheaply in the future thanks to economies of scale, the Bavarians have yet to create such a platform. Zipse has already touched on the subject and calls the BMW of the future "the NEW CLASS."

Daimler, on the other hand, still doesn't seem to know where the journey is headed. While they are also willing to concede in Stuttgart that electric mobility is a very likely future, somehow they still don't seem to believe it. At any rate, the efforts so far with the Mercedes-Benz EQC and EQA have done little to convince the early adopters. But the fact is: With the introduction of a rigid EURO7 standard, combustion engine development is becoming less and less worthwhile, which is why many OEMs have already announced its end.

What all German OEMs have in common, however, is the failure to invest in a European battery industry at an early stage. This is now coming back to haunt the premium manufacturers. Just two years ago, the management of the big three (Audi, BMW and

Daimler) categorically rejected the idea of starting their own battery production. But European battery production would have been smart for a variety of reasons: First, because the “CO2 backpack” of electric vehicles can be dramatically reduced through European green electricity; second, because it would reduce dependence on Asian manufacturers; and finally, because of the battery’s gigantic share in the value chain of electric vehicles.

International competition

That’s not even considering the know-how and technological advances that would be gained in Europe with battery production. So has the German automotive industry finally heard the wake-up call? It would seem so. But it is to be feared that international competition will still be a major headache for the Germans. Chinese and U.S. manufacturers did their homework years ago.

And then there’s the big problem of digitization. But that’s a topic for another column…

About this column

*In a weekly column, alternately written by Bert Overlack, Eveline van Zeeland, Eugène Franken, Katleen Gabriels and **Bernd Maier-Leppla**, Innovation Origins tries to figure out what the future will look like. These columnists, occasionally supplemented with guest bloggers, are all working on solutions to the problems of our time in their own way. So that Tomorrow will be better.*

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