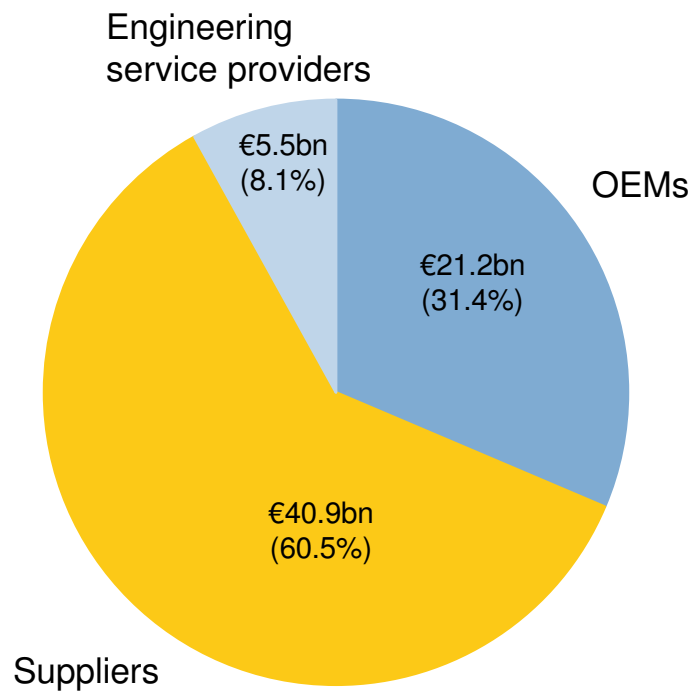
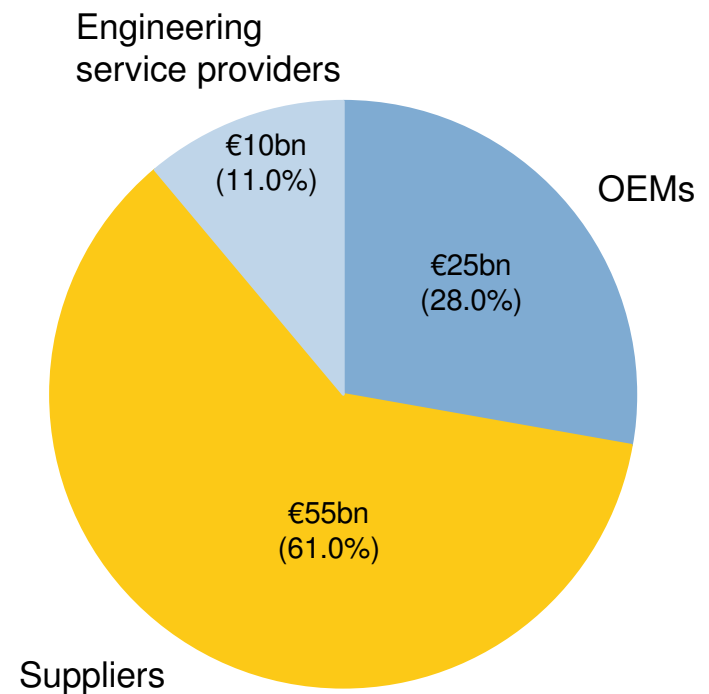


About 70 percent of R&D value creation is generated by suppliers and development service providers

**Automotive R&D value creation 2005:
€67.6bn**

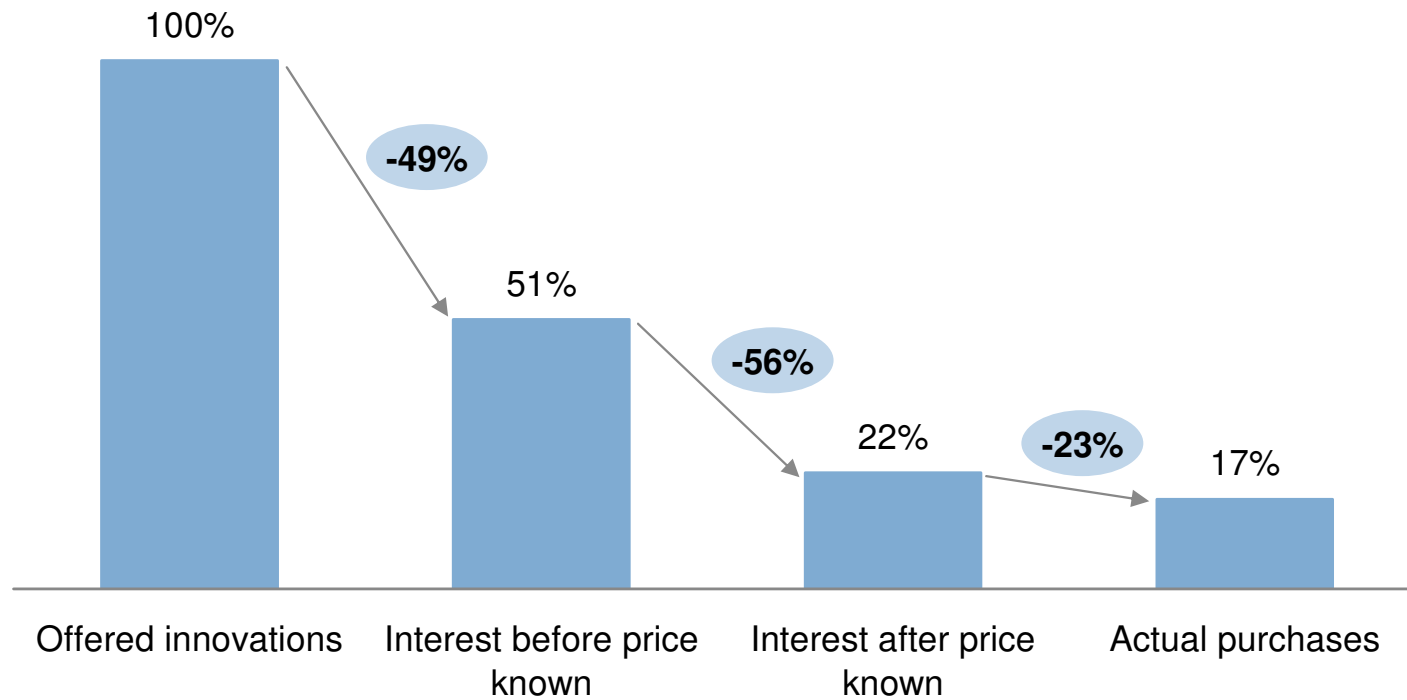


**Automotive R&D value creation 2015:
€90bn**



Only 17 percent of innovations are bought by the customer

Sales success of innovations¹



¹ In Germany and the U.S.; based on 14 innovations in buying simulation

R&D spending of innovation leaders – OEMs

Selected OEMs' R&D spending per vehicle
Average 2001-2005, in €

