THE HANSEN REPORT

ON AUTOMOTIVE ELECTRONICS

Editorial Notes

Dear Reader,

Tesla's stock has recently climbed to absurd heights. Late this summer, despite posting losses every year since its founding, the electric vehicle pioneer's market cap was greater than the market caps of Toyota, Daimler, Ferrari, Hyundai, Honda, Volkswagen, Nissan and Ford, combined. While that valuation is ridiculous, there is much to admire about Tesla. The company leapfrogged over traditional carmakers by aggressively addressing what is clearly the long-term future of the auto industry – electric and autonomous vehicles. Tesla owns a dominant share of the electric vehicle market. Its lineup of electric vehicles offers the world's best range. As the New York Times reported, Elon Musk has "built a fervent fan base that few other automakers, save perhaps high-end sport car brands like Porsche or Ferrari, can claim."

Vertically integrated, Tesla builds its own battery packs and modules. Tesla's clean-slate software architecture has been receiving over-the-air software updates since 2012. Tesla is developing its own self-driving computers and chips, not only for the vehicle but also for the data center. In a recent Twitter post Elon Musk wrote, "Tesla is developing a neural network training computer called Dojo to process vast amounts of video data."

Still, Tesla has a major weakness that competitors can exploit as the mass market for electric vehicles emerges. In the J.D. Power 2020 U.S. Initial Quality Study, Tesla had by far the worst quality compared with the 33 other brands surveyed. Tesla owners reported 250 problems per 100 vehicles. Next closest was Land Rover with 228 problems per 100. The overall industry average was 166.

Cordially,

Paul Hansen
Editor

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Managing Directors: Stefanie Burgmaier, Joachim Krieger, Juliane Ritt

Director Production: Ulrike Drechsler

Head of Media Sales: Volker Heselendz

Editor in Chief: Dr. Alexander Heintzel

Editors: Paul Hansen, Robert Unseld

Head of Sales and Marketing: Jens Fischer

Production / Layout:
Kerstin Bröderlin, Heiko Köllner

Offprints: Martin Leopold,
Medien-Kontor Leopold, Kreuzstr. 1,
53489 Sinzig · phone +49 2642/90 75 96
leopold@medien-kontor.de

Sales Management Automotive:

Rouwen Bastian,
phone +49 611 7878-399 ·
fax +49 611 7878-78399
rouwen.bastian@springernature.com

Display Ad Manager:

Carmen Calvo-Zeller,
phone +49 611 7878-616 ·
fax +49 611 7878-78616
carmen.calvo-zeller@springernature.com