

## Master's Thesis "Margin Shifts in the Automotive Industry"

The automotive industry is experiencing a significant shift in its core technologies from the internal combustion engine to electric vehicles. In 2010, annual global sales of electric vehicles were just a few thousand units, but by 2023, this number had soared to over 13 million units, reflecting a profound shift in the automotive industry. This development profoundly impacts the structure of the automotive ecosystem and the individual players in the automotive industry. In particular, over the last five years, which have been characterized by strong absolute growth in the EV market, automotive suppliers have seen their EBIT margins decline while OEMs have been able to increase their margins<sup>1</sup>. This development raises the question of how automotive suppliers can position themselves in the automotive ecosystem to maintain their competitiveness after the industry transformation. How has the distribution of profits in the ecosystems changed? Are there technology areas where more value can be captured? How are profits distributed along the supply chain, and how much vertical integration should a supplier have? What other factors may affect supplier profits?

To better understand how the transformation toward electric vehicles affects how profits are distributed in the automotive industry, the Management Research Group, in cooperation with the strategy consultancy Strategy&, offers a thesis on the topic: "Value Capture in Transforming Ecosystems." Potential tasks within the thesis are:

- 1) Analysis of the literature on value capture in and transformation of ecosystems
- 2) Identification of potential determinants for value capture in ecosystems
- 3) Collection, categorization, and analysis of automotive industry data
- 4) Identification of drivers using quantitative methods, e.g., regression analysis
- 5) Derivation of recommendations for management and policy. How could suppliers position themselves? What measures can policy-makers take to assist suppliers in the transformation?

The student will write the thesis in close collaboration with the supervisors at the Chair of Management and Strategy&. With the thesis, the student will have the opportunity to generate insights that contribute to solving a pressing challenge for automotive suppliers and an important societal debate. We are looking for highly motivated students with a strong background in management and related fields. Strong communication and project management skills and experience in qualitative or preferably quantitative data analysis are desirable.

**Start date: March 2025**  
**Duration: 3 to 6 months**

Please send your brief application (short letter of motivation, CV, current grade transcript, last degree certificate) by e-mail to Dr. Josua Oll (josua.oll@uol.de). Dr. Hauke Luetkehaus (hauke.luetkehaus@uni-oldenburg) will be happy to answer any questions you may have about the content of this thesis. We look forward to receiving your application!

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<sup>1</sup> Strategy& 2024. Automobilzulieferer-Studie 2024. <https://www.strategyand.pwc.com/de/de/industrie-teams/automobil/automobilzulieferer.html>