



Annual Report of Activities 2018-2019

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European Association of Automotive Suppliers

CLEPA

European Association of Automotive Suppliers

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A global technology leader

The European automotive suppliers' industry is a global technology leader, largely due to its annual investment of more than €22 billion in innovation. For years, European automotive suppliers have registered the majority of patents for innovations in vehicle emissions reduction and vehicle safety by bringing to the market an increasing diversity of products, with ever shorter development and production cycles.

The ability for industry and their associated service companies to sell their products both in Europe and the world form the necessary basis for further investment, innovation, tax revenues and employment in Europe.



3.000+
SMEs represented



75%
of the vehicle value
comes from suppliers



5 million
Direct and indirect jobs



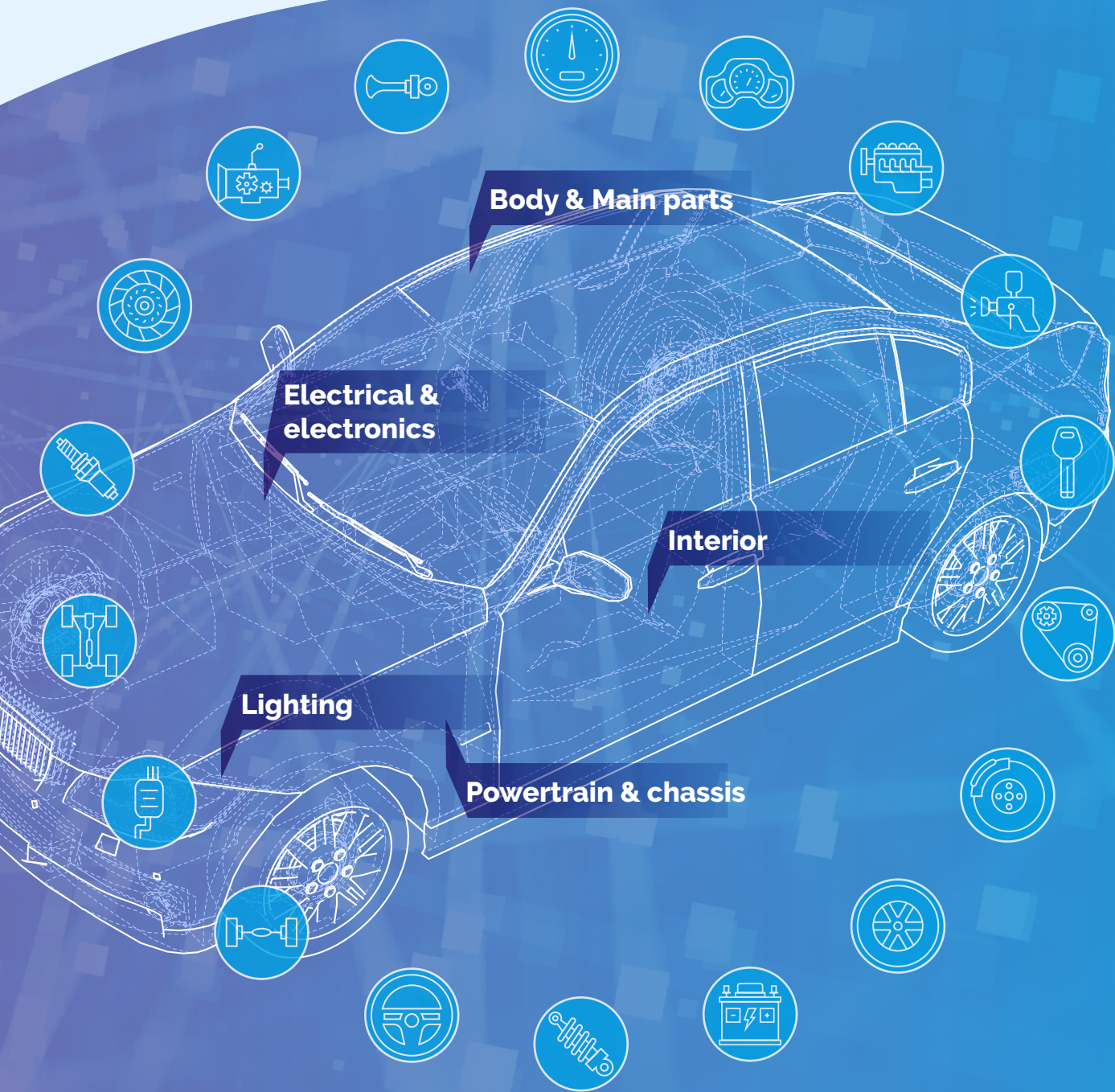
€22 bn
Invested in R&D each year



±3.000
Patents filed by the automotive
industry each year



€600 bn
Turnover each year



30.000 parts

An average car is made of 30.000 parts and CLEPA members cover all of them

Foreword by Roberto Vavassori

CLEPA President



Dear members,

The last twelve months proved to be a very critical period for our industry.

On the one hand, markets were reaching a somewhat natural end to their long recovery cycle, following the recession of the years 2008 and 2009, with product volumes levelling at first and, more recently, starting to decrease. The automotive business is however reputedly cyclical, and our sector therefore resilient and well-equipped for this event.

What made the past year especially critical, concerns the legislative targets recently adopted by the EU to reduce CO2 emissions from light and heavy-duty vehicles.

Let there be no misunderstanding: component suppliers in Europe fully embrace the decarbonisation of mobility and we, therefore, support the rapid and progressive electrification of vehicles. But we also stress the need to develop all other technologies that bring us, as society, to that goal. There is no silver bullet; the challenge is complex and increasingly involving multiple actors.

We call to respect the technology neutrality principles that have fruitfully guided EU policy in the past and argue for a proper balance between the interests of the

environment and the competitiveness of our industry.

It will not surprise when I say we would have liked to be more successful in making our case.

Being President of CLEPA for two terms, I've been able to witness from close-by how factual and technical input can weigh little when policy discussions appear overly biased by mistrust and simplification. Addressing this trend remains one of the major tasks ahead for CLEPA, the voice of our community, together with its members, be it national associations, corporations or associate members.

The transformation is on its way. The next milestone is already in sight, with legislators bound to assess progress in 2022 and 2023. We must now strive to continue informing our national governments as well as the EU institutions to adopt a balanced and holistic approach to environmental protection, European competitiveness and geopolitical security for the sake of all of society. We have a duty to manage the process well. It's worth all our best efforts.

With kind regards,

Roberto Vavassori
President

Welcome by Sigrid de Vries

Secretary General



Dear members, stakeholders, colleagues,

2019 is a pivotal year with European elections setting the stage for the next 5-year cycle in EU policy making, requiring the CLEPA team to build new and strong relations with MEPs and European Commissioners. 2019 is also the year CLEPA, the association celebrates its 60 years anniversary with the launch of a Vision on the Future of Mobility from the Perspective of the Automotive Suppliers.

Central to this vision is the concept of co-creation: the challenges and opportunities of today's and tomorrow's smart, safe and sustainable mobility can only be tackled in close cooperation with other actors in the transport and traffic mix. This requires leadership, flexibility, ingenuity and commitment; all values deeply engrained in the DNA of automotive suppliers.

In 2018, CLEPA has worked hard to strengthen its foundations, with new Statutes of Association solidifying its governance and finances, a sharper focus of the Working Group organisation, the further strengthening of the CLEPA team, and a more pro-active policy outreach and communications.

This is work in progress, but it will support our goal to be heard in all corners of the institutional decision making, whether in the EU headquarters in Brussels, in Geneva at UN-ECE, or in the Member States, and

whether on roadmaps for R&D, sustainable development goals, decarbonisation & air quality, connected & automated driving, fair access to data, the automotive aftermarket, or vocational training & skills.

Automotive suppliers have important stories to tell and key contributions to make in the transformation to zero pollution, zero fatalities and seamless, service-centric mobility.

CLEPA proudly articulates what makes this industry leading in the global arena – high-quality and highly-advanced mobility technology solutions -, and what policy can do to support: cooperation in fundamental research, completion of the (digital) single market, global convergence of technical requirements, reciprocal market access, enforcement of intellectual property rights, a predictable regulatory framework, an agile business environment for SMEs.

Europe is right to prioritise innovation, promote high-standards and defend rules-based trade. These are no hollow phrases: they are the cornerstones of sustainable European growth and competitiveness.

Thank you for your support,

Sigrid de Vries
Secretary General

2018-2019

A Year in Review



July 2018

- ENSEMBLE Project: 1st month
- The 4th version of the Automotive Industry Guideline (AIG) on REACH was published

September 2018

- Presentation of "Aftermarket 2025" study during Automechanika Frankfurt
- CLEPA Position Paper on Urban Pollution



January 2019

- 17/01 Adoption on agreement on CO₂ post 2020 standards for cars and vans

February 2019

- Adoption CO₂ standards for Heavy Duty vehicles (HDV)

March 2019

- 10th edition of CLEPA Aftermarket Conference



October 2018

- ARCADE Project kicks-off
- BREXIT: Position Paper and press conference

November 2018

- CLEPA 1st Counterfeit day
- Briefing for attachés on CO₂ standards for HDV

December 2018

- CLEPA dinner debate on Innovation at EU Parliament



April 2019

- EUCAD Conference-focused on the future of autonomous mobility

May 2019

- CLEPA Materials Regulations event
- Adoption General Safety Regulation-package of vehicle safety and pedestrian protection measures.

June 2019

- CLEPA General Assembly and Innovation Awards

Who We Are

CLEPA, the European Association of Automotive Suppliers, represents over 3.000 companies supplying state-of-the-art components and innovative technology for safe, smart and sustainable mobility, investing over 22 billion euros yearly in research and development. Automotive suppliers in Europe employ nearly five million people across the continent.

Our Vision

Our vision is for the European automotive suppliers to be the leading providers of highly efficient and sustainable mobility worldwide.

Our Priorities



Energy &
Environment

Co-define the framework conditions for transitioning to **SUSTAINABLE MOBILITY**



Safety

Co-shape the longer-term (soft-)policy objectives for **ZERO-ACCIDENT MOBILITY**



Mobility
Evolution

Identify and promote the framework conditions for **CONNECTED & AUTOMATED DRIVING** incl. policy on access to data, e-privacy, liability, cybersecurity



Growth &
Competitiveness

Promote and defend efficient international value chains and rules-based **MARKET ACCESS**

Co-define the **EU RESEARCH & INNOVATION PRIORITIES**, roadmap and funding opportunities



Energy and Environment

Ensure a favourable regulatory framework on CO₂ and pollutant emissions

Protection of the environment and the improvement of air quality are important objectives for the automotive suppliers' industry. These objectives have been placed at the top of the decision-making authority's agenda during 2018 and 2019, with the adopted legislations on the CO₂ emission for vehicles. CLEPA is involved in the discussion on the further development of the regulatory framework, for example by contributing to the development of a methodology to measure CO₂ emissions of vehicles over their life cycle, which may level the playing field for different drivetrain technologies and energy sources.



Emissions

CO₂ emission standards for cars and vans

On 17 December 2018, the European Parliament and the 28 EU member states reached an agreement on standards for CO₂ emissions from new cars and vans. The regulation requests that emissions from cars have, on average, to fall by 15% by 2025 and 37.5% by 2030. For vans standards of 15% and 31% apply. These standards are considerably more ambitious than the values which had been proposed by the Commission originally. CLEPA had supported the Commission's proposal as ambitious but workable. Furthermore, the supplier community had argued in favour of a more flexible regime for eco-innovations, technologies which reduce emissions without being recognised by the test-cycle such as efficient air-conditioning systems. CLEPA argued in favour of a better recognition of hybrid vehicles in an incentive system for well-performing technologies, which has been included. Suppliers argued against the introduction of fines in the incentive system, which had been proposed, but finally not included in the regulation.

Stakeholders agree, that the ambitious targets can only be achieved by increasing the share of battery-electric or fuel-cell vehicles in the fleet. Achieving such proportions is only partly in the hand of the automotive industry: Currently consumers do not embrace battery electric vehicles, given the higher price point and limited charging infrastructure. The regulation mentions now explicitly, that charging infrastructure and other factors need to be taken into account in the review of the regulation in 2023.

CLEPA has over consistently argued in favour of making the step forward from tank-to-wheel to well-to-wheel. The European Parliament

went even further by inserting a call on the Commission to examine the possibility of introducing life-cycle assessment (LCA) in future regulation. Such examination is currently under way, with a study on proposing a commonly agreed LCA methodology commissioned by the Commission to a consultant. CLEPA is contributing to the work.

Part of the agreement includes for the European Commission to review the effectiveness of the regulation, by monitoring and reporting on car emissions in lab tests and real-world conditions from 2021 to 2026. After this date, the European Commission may propose a mechanism to deal with the discrepancy between the two that will be put into force by 2030. As part of this review, the European Commission must evaluate the possibility of considering life-cycle emissions from cars for future CO₂ regulations.

Non-compliance with the new regulation includes penalties for manufacturers that fail to meet the expected CO₂ fleet average, as included in previous regulations. This would trigger different options to achieve their specific emission target, including adapting sales and marketing strategies to reducing CO₂ emissions and possibly also subsidising sales of low to zero emission technologies.

CLEPA sees the current regulation as extremely ambitious and underlines the risk of disruption of the industry. Automotive industry efforts and high investment in R&D are showing that the sector is on the path to bringing down CO₂ emissions from cars and vans to the levels required by regulation. However, such effort comes at a time, when automation and connectivity demand substantial investments and the global economy shows signs of cooling. Cooperation between competitors, up to consolidation in the market may become visible.

CO₂ emission standards for Heavy Duty Vehicles

For the first-time ever, a new regulation to measure the CO₂ emission coming from heavy duty vehicles was proposed in May 2018 and an agreement on the parameters struck in February 2019. Manufacturers of heavy-duty vehicles will need to reduce average carbon emissions by 15% by 2025 and 30% by 2030.

As a precursor of the regulation, VECTO (Vehicle Energy Consumption calculation Tool) for the simulation and certification of emissions of a vehicle, was introduced. The tool will be used to determine the emission of each vehicle sold and, in a next step, to calculate the average emissions of the fleet of vehicles registered by a given manufacturer in a given year.

As of 2019, the CO₂ emissions and fuel consumption data determined with VECTO, together with other related parameters, will be monitored and reported to the Commission and made publicly available for each of those new trucks.

CLEPA has argued that currently, the scope of VECTO is limited to the tractor and a limited number of drivetrain technologies. Only once the tool is upgraded to take into account efficiency gains from hybridisation and more efficient components for trailers, that the associated potential to reduce emissions will be unlocked.

Future regulations: development of post-EURO 6/VI emission standards

The European Commission has underlined the development of post-EURO 6/VI emission standards as part of its Work Programme on Automotive and Mobility Industries 2019-2020.

CLEPA, mainly via its technical groups is fully involved on the EU Commission in-depth studies (fact-based methodology, integrated policies approach, technology and fuel neutrality, alignment with CO₂, global harmonisation) to ensure that the automotive suppliers industry principles are taken into account.



The awareness of environmental protection within society is increasing and creating demand for high-performance vehicles with a lesser impact on the environment."

Sustainability

Minimising environmental impact



From the conception to the production, suppliers strive to make their products and services ever more environmentally friendly and energy efficient.

Sustainability is at the heart of the European Automotive supplier industry. From improving the environmental performance of vehicle and component manufacturers, the commitment for a comprehensive Industry Social Responsibility to the investment in the skills of employees, right through to the remanufacturing or “second life” of components and the recycling of end-of-life vehicles, the industry seeks to ensure it is a model of industrial sustainability.

CLEPA, via several of its working groups, has the commitment to facilitate common sustainability principles and tools.

High performance materials

During the production of the vehicles parts is used a diverse range of materials, chemicals and processes. The responsibility of safe handling uses and disposal of the products is a high priority for suppliers. Suppliers fully respect reuse, repair and recycling needs and more sustainable materials are developed and promoted.

These materials have evolved greatly over the decades, becoming more sophisticated, better built, and safer. Their use has evolved in parallel with the new automotive manufacturing technologies that now are increasingly using innovative ways.

High performance materials contribute to create lighter vehicles, contributing to their environmental performance. Research and development into lightweight materials is essential for lowering their cost, increasing their ability to be recycled, enabling their integration into vehicles, and maximising their fuel economy benefits.

EU Sustainable Development Strategy

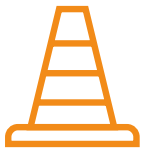
The EU Sustainable Development Strategy is an overarching policy framework providing guidance for all EU policies and strategies and including a global dimension, with an agenda committed to the 2030 UN SDG Sustainable Development Goals and a vision up to 2050 encompassing: climate change, clean energy, sustainable transports, resource and waste efficiency, hazardous chemicals, social inclusion, bio-diversity, public health, investments, R&I.

GreenNcap

Green NCAP is an independent initiative, introduced in 2019, which promotes the development of clean, energy efficient and environmentally friendly cars. It aims to improve the quality of the air that we breathe, to maximise the use of resources used for passenger transportation and to reduce global warming.

The consumer program test and rates vehicles on their environmental performance

Different aspects will be combined into a single overall rating to inform the market in a simple, transparent and objective (technology neutral) manner.



Safety

Road safety is not only a societal challenge, but also a focus area of strategic importance to European automotive suppliers, who have been playing a leading role in safety technology for decades.

Automotive suppliers continue to develop vehicle systems to mitigate or avoid accidents taking into account the human and external factors, which are the most frequent roots for accidents, and are working towards zero casualties by 2050.

Working towards zero fatalities

In April 2019, the revision of the General Safety Regulation (GSR) was adopted in an all but final stage by the EU institutions, with the expectation that the new European Parliament will sign off the text upon starting its term.


The regulation will introduce a number of safety technologies that will be progressively made mandatory for new vehicles starting in 2022.

This agreement, that was included by the European Commission as part of the EU road safety policy framework for 2021-2030 and strategic action plan on road safety, confirms the EU's long-term goal of moving close to zero fatalities and serious injuries in road transport by 2050.

The revised GSR is intended to help Europe reach its goal of significantly reducing road traffic accidents further, while also paving the way for automated vehicles.

CLEPA advocated very strongly on the need of the timely adoption of the GSR, whose revision was long overdue, with a nearly a decade gap since the latest review. During the last five years, the fatalities on the EU roads have been stagnating, as the latest safety technologies were not made mandatory for vehicles. In this regard, it is positive that European lawmakers understood the need for swift action and worked to get the revised GSR adopted before the EU elections, thus avoiding further delays.

From 2022, new vehicles will progressively include all the technologies that the European Commission had proposed, including Autonomous Emergency Braking, Lane Keep



Assistance, Tyre-Pressure Monitoring Systems, Intelligent Speed Assistance, drowsiness and distraction recognition and vulnerable road users detection and accident data recorders.

Several activities were carried out to promote the adoption of the standards, including the participation on the European Transport Safety Council (ETSC) campaign "Last Night the EU Saved My Life", that supported the revision as a major step toward reaching EU road safety targets and a significant reduction of road casualties. CLEPA further collaborated with the ETSC and other safety stakeholders in its outreach to Members of the European Parliament. Also, during the United Nations Road Safety Week in May CLEPA supported the "Save Lives/Speak Up" campaign.

The Regulation will accelerate the deployment of effective and cost-efficient safety measures, most of which are already mature and available on the market and will boost the competitiveness and global leadership of the European automotive industry in this sector.

In parallel, via the CLEPA Technical Regulations working group, the improvement of the existing safety regulations is supported and promoted, both at European and at Global level, via direct participation at the United Nations World Forum for Harmonization of Vehicle regulations. Many different and essential technical requirements are considered, as in example braking and steering, safety belts, child restraint systems, lighting and light signaling and radio, electric and electronic equipment.

Paving the way for autonomous driving

As part of the development of the standards for connected and automated vehicles, the European Commission has proposed a delegated act on Cooperative Intelligent Transport Systems (C-ITS) to support the deployment of systems based on a hybrid communication approach, namely the ITS-G5 standard, a mature technology tested in large fleets and infrastructure projects. ITS-G5 is a short-range system, ideal for car-to-car communication and car-to-infrastructure communication, that is currently available and offers possibilities to safety applications that can prevent an imminent collision between two vehicles, among several others.

Also, 3G/4G longer-range communication technologies, which leverage the coverage of existing networks and connect large areas, albeit for less time-critical V2I services such as traffic management services.

This regulation ensures that future technologies can be integrated in the 'hybrid communication' mix. A review clause facilitates the integration of candidates, such as LTE-V2X (a cellular-based short-range communication technology) and 5G, the set of technologies for next-generation cellular networks.

Integrated approach to avoid fatalities: Safety pledge

In June 2018, a coalition of major players in the European mobility sector, namely CLEPA, ACEA and FIA signed a road safety pledge to reduce traffic fatalities to zero by 2050.

The associations emphasised their commitment to support the road safety targets of the European Commission and member states. This pledge was signed in the presence of the European Commissioner for Transport, Violeta Bulc and the United Nations' Special Envoy for Road Safety, Jean Todt. The common vision highlights the commitment from relevant parties on an integrated approach to road safety. CLEPA reinforced its commitment to contribute to road safety and to make zero casualties a reality.

Concrete actions may include the promotion on the potential benefits of technologies, which improve safety, highlighting the role of the programmes that work towards increased safety and the support and organisation of educational and training programmes for citizens and drivers.

Highlighting safety technologies to the customer: EuroNCAP

CLEPA works in close cooperation with EuroNCAP, the European safety performance assessment programme for new cars. During the last year, the contribution was focused on finalising some 2020 protocols and prepare the next phases scheduled in 2022 and 2024. A new assessment of existing driver assist systems and future level of automation has



also started. This and works on virtual testing for Crash Worthiness and Crash Avoidance, occupant status, pedestrian safety and rescue resulted in the foundation of new EuroNCAP working groups and consequentially new CLEPA mirror groups. The programme uses a continuously improved star safety rating system to help consumers to compare vehicles, by highlighting the safest choice, that is determined from a series of vehicle tests. Automotive supplier's component manufacturers support this initiative and to continue promoting improved fitment and higher performance for all vehicles.



The safety pledge coalition was launched in June 2018. In the picture: Roberto Vavassori, CLEPA; Erik Jonnaert, ACEA; Violeta Bulc European Commissioner for Transport; Jean Todt, FIA and Møller Thomsen, FIA Region I

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Mobility Evolution

Connectivity and automation are drivers of change and innovation in the automotive industry and mobility overall. Ensuring a harmonised global framework for operating autonomous vehicles, policies on cybersecurity and connectivity as well as related areas such as product liability are necessary preconditions for the mobility evolution. The more vehicles become smart and connected, the more data they produce. Such data holds great potential for the development of new products and services. However, it is debated who shall own such data and the right to use it. In addition, there are multiple areas of policy and regulation which are either directly or indirectly relevant to automotive suppliers and the evolution of mobility, such as data protection or legislation on performance testing, which are continuously reviewed to identify opportunities and risks. An overview of priorities on international and EU level follows here.

A harmonised global framework

With the first steps towards automated mobility taken, stakeholders agree, that in order to fulfil their potential, vehicles must be placed on the market in a way that reassures authorities and road users of their safety. The relevant regulatory framework is discussed at international level, within the framework of the United Nations World Forum for Harmonization of Vehicle Regulations (WP.29).

At its February 2018 session, the UN Inland Transport Committee (ITC) acknowledged the importance of WP.29 activities related to automated, autonomous and connected vehicles. A dedicated subsidiary Working Party on Automated/Autonomous and Connected Vehicles (GRVA) was established in June 2018, which discusses topics pertaining to automated vehicles: test methods, cybersecurity, data storage systems to the event data recorder. CLEPA fully supported these structural changes and reflects these in



its internal working structure. Suppliers have pointed out the need to further detail the priorities and to take further items into account, specifically Automated Lane-Keeping-Systems, whilst ensuring efficiency.

The adaptation of the existing framework for vehicle certification to automated and autonomous vehicles is one of the prerequisites for their deployment. Compared to conventional vehicles, the potentially affected safety-areas and variances of scenarios will increase and cannot fully be assessed with tests on a track or bench. CLEPA, in close cooperation with the International Organisation of Vehicle Manufacturers (OICA) developed the so-called "Multi-Pillar Approach", which builds on a combination of laboratory tests and simulations, the audit of the manufacturer's safety concepts and road tests.

Against the background of international cooperation, specifically with the US, it is important that such an approach could be applied both under a type approval or self-certification regime. Looking forward, automotive suppliers will work on refining their requirements for the verification regime.

Radio Spectrum

The automotive industry is competing with other sectors for the use of a scarce resource, radio spectrum, a pre-requisite for automated and autonomous driving as well as connectivity.

In 2018, CLEPA defined the supplier position regarding the use of the 5.9 GHz frequency band which is dedicated for short range communication amongst vehicles, infrastructure and vulnerable road users in the context of Cooperative Intelligent Transport

Systems (C-ITS) and is regulated in a number of EU laws.

CLEPA calls for technology neutrality, in order not to endanger any existing or future technologies. Furthermore, CLEPA, in close alignment with the European Automotive and Telecoms Association (EATA) argues that communication supporting safety related applications shall remain in the designated C-ITS 5.9 GHz band, while communication with the network shall use IMT (mobile) bands and additional spectrum shall be made available. Segmentation and segregation of the 5.9 GHz frequency band is not desirable, different communication technologies shall have equal access to the shared spectrum. New technologies shall prove coexistence with existing standards. Finally, CLEPA supports interoperability and compatibility of communication for C-ITS purposes.

Access to data

Automated and connected vehicles will generate a large amount of data. This data holds enormous potential to create new services and products, revolutionise existing business models or lead to the development of new ones.

The European Commission recognises in its communication "On the road to automated mobility" that "different economic actors are competing for such data. Vehicle manufacturers or digital platforms have a privileged access to car data and to vehicle resources, such as the possibility to propose services directly to the driver by using the vehicle dashboard."

Discussions among stakeholders on possible technical solutions have been ongoing since 2016, including the "Extended Vehicle Concept". However, expectations towards the type and volume of data to be made available differ

substantially and, consequently, a common position has not been found yet.

CLEPA has been instrumental in reviving the talks at the beginning of 2018. Other parties, such as the insurance business, leasing and fleet operators, independent repair shops, as well as technical verification bodies participated in developing concrete use-cases to test the "Extended Vehicle Concept". The test phase started in October 2018 and reports are to be finalised by mid-2019.

CLEPA will compare the results with the priorities, which have been defined by the automotive suppliers community to achieve fair data access, in order to inform policy makers and facilitate dialogue among stakeholders.

The European Commission is monitoring the discussions as it considers further options concerning an enabling framework for vehicle data sharing to allow for fair competition. CLEPA will naturally provide information and expertise to the Commission's opinion-forming process.

Cybersecurity

Regulations on cybersecurity are under development in a fast-paced technological environment. One of the priorities of the automotive industry is to ensure coherence and consistency of regulations on UNECE and EU level, as well the relevant ISO/SAE standards, specifically the EU Cybersecurity Act and type approval legislation and the UNECE regulation on cybersecurity.

To ensure effective engagement, CLEPA has created a joint working group with the association of motor vehicle manufacturers in Europe (ACEA), to analyse the policy and regulatory development, formulate priorities and engage interlocutors to ensure education and awareness of decision makers in institutions such as the European Commission and ENISA, the EU Agency for Network and Information Security. CLEPA also works together closely with OICA, the International Organisation of Motor Vehicle Manufacturers, to consolidate industry input feeding into the UNECE regulations on cybersecurity and software updates.

Accompanying the regulatory activity, the automotive industry works with Auto-ISAC, an industry-driven community to share and analyse intelligence about emerging cybersecurity risks to the vehicle, and to collectively enhance vehicle cybersecurity capabilities across the global automotive industry. European suppliers and OEMs are making suggestions to improve and streamline the cooperation, for example by considering a true "internationalisation" of the community by creating a European presence.

Looking into the future, automotive suppliers are working towards developing a strategic approach to cybersecurity policy for the mid to long term, which will need to go beyond technical aspects and harmonisation to cover for example aspects of liability and access to data.

Product Liability

Only a very small percentage of accidents or safety critical events that involve vehicles are caused by technical failures. However, depending on the respective application – the responsibility and thus the civil liability will shift from the driver to the vehicle manufacturer as well as other involved automotive, connectivity as well as infrastructure stakeholders.

Therefore, it should be considered whether and subject to which conditions the overall automotive, connectivity and infrastructure industry's liability exposure will or will need to increase.

The existing Product Liability Directive (PLD) was adopted in 1985 when vehicles were built mainly with mechanical components. Software, services and autonomously operating vehicles had not been anticipated. The Commission is reviewing the PLD, with an adaptation ideally prior to CAVs being deployed on the roads in Europe.

CLEPA is contributing to the review, with a priority on updating definitions covering state of the art engineered products including all dependent services for proper functioning. It will be important to assign liability, where necessary to the economic operators deemed at fault.

One prerequisite is the introduction of the "event data recorder" to clearly assign responsibilities based on data and harmonised liability regimes in all EU member states regarding road and traffic laws, civil laws or strict liability regimes.

European Automotive and Telecoms Alliance



EATA, founded in 2016, is the only European platform to bring together key players

from the auto and telecoms sectors, comprising 32 companies as members and six founding associations (including CLEPA), with the objective to facilitating and accelerate the EU-wide deployment of connected and automated driving.

In 2019, EATA launched a manifesto, calling for a new, digitally-driven mobility ecosystem to be created in the EU and accelerate the deployment of connected and automated mobility (CAM) in Europe, concentrating on four main key enablers.

1. Enable a clear framework aimed at fostering investment and innovation;
2. Avoid fragmentation through coordination of policy initiatives;
3. Recognise that technology neutrality is critical to the development of connected and automated mobility;
4. Accelerate cooperation on the global stage.



Growth and Competitiveness

Automotive suppliers are global players and an essential part of the EU economy, contributing to sustainable growth, innovation and jobs.

Europe automotive suppliers strive to maintain their technology leadership and need a business-friendly and competitive regulatory environment in order to produce innovative and sustainable products and services that create employment and ensure prosperity for Europe's citizens.

European automotive suppliers are drivers of innovation: they annually invest over €22 billion in R&D and bring an increasing diversity of products to the market, with ever shorter development and production cycles. The ability of the industry to sell their products in Europe and all over the world forms the basis for further investment, innovation, tax revenue and employment in Europe.

Innovation is crucial in the mobility sector, as it contributes to sustainable and efficient transport and supports European competitiveness. As part of our activities, CLEPA organises the yearly Innovation Awards competition that recognises the accomplishments of Europe's automotive system and component manufacturers in the areas of environment, safety, connectivity, automation and cooperation.



Horizon Europe- Investing in Europe's future

Horizon Europe is the next research and innovation framework programme that will run for seven years (2021- 2027).

The budget is currently being discussed by policy makers: the proposal by the European Commission is ~ €100 billion, which represent an increase of ~30% from the current Horizon 2020 research programme.

CLEPA has been contributing to these discussions to guarantee an appropriate budget for the main areas of interest of our industry, and at the same time advocating that the key R&I priorities for road transport and mobility are properly considered together with related research needs.

Support from funding programmes remains highly important to initiate pre-competitive and collaborative research involving universities,

research organisations, industry, SMEs, public authorities and operators and other actors thus boosting investments by the automotive suppliers for product development.

Skilled labour force

European industry is currently facing challenges due to a limited supply of a suitably-skilled labour force. This is harming its ability to compete globally and to ensure its competitiveness in the future. An ambitious European skills programme, which integrates various skill sets and adapts to future sector needs, must be a constituent part of any EU industrial strategy package. To that end CLEPA is involved in different initiatives, such as the EU Project DRIVES. These are designed to ensure the development of comprehensive skills programmes that take into account the current and future requirements of the automotive supplier sector.

Trade, a changing environment

The automotive supply chain is globally intertwined and promoting access to foreign market has therefore long been a point of focus for CLEPA. During the past year we have seen an upcoming number of announced trade restrictions, that are affecting EU markets negatively, putting jobs at risk and increasing cost for customers and consumer, on both sides of the trade relationship. CLEPA defends free and fair trade, and highlights that any such possible measures would be highly damaging to the competitiveness and growth of the EU automotive sector.

EU-US trade talks

Most prominently on our agenda are the EU-US trade talks. CLEPA supports the European Commission in its rejection of any non-compliant WTO voluntary trade restrictive agreement, introducing caps or quotas for the import into the US of automotive parts and accessories.

EU-China relations

Also, during the last months, the European Union has reviewed its relations with China, and the related opportunities and challenges that brings. China is now the EU's second-biggest trading partner behind the United States and the EU is China's biggest trading partner.

The EU is committed to progressing on opening-up trade relations with China. However, the EU wants to ensure that China trades fairly, respects intellectual property rights and meets its obligations as a member of the World Trade Organization (WTO).

Brexit

During the negotiations on the UK leaving the EU, CLEPA has strongly advocated against a no-deal Brexit which would be a worst-case scenario for our industry. Currently, the Single Market guarantees the free movement of goods, people, services and capital. The lack of clarity about the Brexit outcoming negotiations is already damaging the supplier's industry in Europe and in the UK. CLEPA will continue to promote a future trade relationship that would include tariff free exchange of goods, minimal customs procedures and access to trade preferences as provided for by the Customs Union. Furthermore, regulatory alignment and cooperation in the future is essential to dismantling non-tariff barriers to trade and liberalising the markets.

Market intelligence: Pulse Check

During the past year, CLEPA carried out two "Supply Industry Pulse Check" surveys amongst the European automotive suppliers community in Europe, with the aim of obtaining deeper insights into the current business sentiment and the outlook for the industry including performance levels, trends, and overall industry sentiment.

The initiative has been received with great interest. Some of the covered aspects included market expectations, taking into account uncertainties such as Brexit or trade issues, business development, new technology and trends like electrification, integrated mobility, connectivity and autonomous driving among others.

The information is available for CLEPA members.

Trade: FTA (Free Trade agreements) between EU and other regions of the world

Region	Status	Next steps
USA	The Council of EU approved two negotiating mandates on 15 April 2019 for the elimination of tariffs for industrial goods. The U.S. President issued a proclamation on 17 May, postponing but not eliminating the potential unilateral step by the US to introduce tariffs, quotas or caps on imports of cars and components, pending an agreement.	Further steps to be determined
EU-EPA Japan	Economic Partnership Agreement (EPA) ratified by the European Parliament end 2018. The agreement came into force on 1 February 2019.	
EU-CHINA bilateral investment	Negotiations for a comprehensive EU-China investment treaty were formally launched in November 2013. The objective is to remove market access barriers to investment and to provide a high level of protection to investors and investments in EU and Chinese markets. In 2016, EU and China established a joint negotiating text.	The 21st round of negotiations will take place in Beijing during June 2019.
Mercosur	FTA negotiations were resumed in 2016 after an exchange of market offers taking place in May 2016. The last negotiating round took place during March 2019.	The next negotiation round is to be set.
Vietnam	Trade & investment negotiations were completed in December 2015. This resulted in a EU-FTA and an Investment Protection Agreement (IPA).	The EU Council is still reviewing the agreements in view of future signature and the European Parliament must give its consent. The investment protection agreement with Vietnam will follow its ratification procedure at the EU on Member States level.
Indonesia	Last round took place during March 2019	The next round will take place in June 2019.
Philippines	The last round took place February 2017	No date has been set for the next round of negotiations
India	FTA negotiations were launched in June 2007, but brought to a de facto standstill in summer 2013 due to a mismatch of ambitions. The EU remains committed to strengthening an economic partnership with India, once a sufficient level of mutual understanding and ambition of the scope have been agreed between the parties.	Both sides remain in regular contact in order to create the right conditions for resumption.
Australia	Talks for a comprehensive FTA were launched in July 2018, following the Council of EU's authorisation to open the negotiations.	4th Round of negotiations will take place during July 2019.
New Zealand	Negotiations were launched in June 2018. The last 3rd round of talks took place during February 2019.	4th Round of negotiations will take place during May 2019.
Mexico	A political agreement for the modernisation of the EU-Mexico Global agreement was reached on 21 April 2018.	At the end of 2018, negotiators resolved some remaining technical issues and finalised the full legal text.
Chile	FTA negotiations were launched in November 2017. The last 4th one took place during April 2019.	The 5th Round of negotiations will take place during July 2019.
ASEAN (Association of Southeast Asian Nations)	Negotiations ongoing with a grouping of 7 ASEAN Member States, to work out the parameters of a future region to region agreement.	Technical group meetings are to be confirmed in July 2019.

How We Work

What we do

- Supporting the EU and UN decision making process and shaping the legislation impacting the automotive business.
- Being a credible partner to the EU institutions and the UN authorities.
- Actively endorsing the development of the necessary competitive framework conditions.
- Ensuring coherent and consistent development of international trade and global technical harmonisation.
- Promoting innovation and ensuring EU funding for RDI.
- Complying fully with EU competition and antitrust rules.

A global player

CLEPA is an accredited partner of international organisations, including the European Union and the United Nations, making it a worldwide stakeholder and leader for global legal and technical harmonization in the automotive industry.

How we work

CLEPA is an international, non-profit making association, based in Brussels. The CLEPA membership consists of National Associations as well as Corporate Members with activities in the EU. CLEPA also represents a variety of Associate Members, including European sector associations active in the automotive supply chain as well as associations and corporations based in the wider European geographical area.

CLEPA's main decision-making bodies are the General Assembly, the Board of Directors and the Steering Committee. The General Assembly consists of all active members and exercises all powers necessary to carry out the purposes of the association.

CLEPA organises its collaboration with members via different working groups, experts' groups and tasks forces, to tackle specific areas of activity of the association.

Working groups regularly meet in Brussels to exchange information and define positions. They can delegate specific tasks to Expert Groups or Task Forces. Expert Groups focus on dedicated, often highly technical topics, whereas Task Forces are constituted for a limited period of time and deal with particular issues not covered by an existing expert group.

Committees and Working Groups have an advisory role to the Board of Directors and their composition, organisation and rules of procedure of are determined in accordance with the rules laid down in the association's Internal Rules.

CLEPA members are active in all of CLEPA's governing bodies, ensuring that their vision and knowledge is reflected in all CLEPA activities

CLEPA Working Groups/Committees

GASG- Governmental Affairs Strategy Group

The Governmental Affairs Strategy Group is the platform for CLEPA to effectively coordinate its advocacy activities on behalf of all members. The group benefits greatly from its members' combined expertise for public affairs strategy, as well as deep industry knowledge and strategic outlook on the future of mobility.

WG R&I- Research and Innovation

The mission of the CLEPA Research & Innovation Working Group is to strengthen the position of automotive suppliers in the mobility research eco-system. This is implemented by defining common research priorities, communicating with other stakeholders and contributing to the EU research agenda with highly innovative projects.



The need for a common European Research and Innovation strategy on road transport is more important than ever, to guarantee the European global leadership on the automotive suppliers sector. CLEPA supports their members in defining common research priorities and have them as part of the EU agenda"

Camille Feyder, Delphi Technologies, Chairman of the R&I WG

WG S&M- Safety and Mobility

This Working Group is the prime CLEPA platform for developing positions on strategic trends and issues related to road safety and new mobility technologies, solutions, functions and systems. Topics include, but are not limited to enablers such as connectivity, automation, artificial intelligence, cybersecurity and intelligent infrastructure.

WG E&E- Energy and Environment

The role of this group is to develop positions on strategic trends and issues related to sustainable mobility and road transport. Topics include, but are not limited to, enablers such as electrification and other alternative power solutions, renewable fuels, advanced combustion engine technology, advanced materials, life-cycle assessment resource efficiency and circular economy.



CLEPA Governmental Affairs and Communications Team



Legal Advisory Group

WG Trade

WG Telematics

Aftermarket Forum

General Safety

Radio Regulations

Lighting

Euro NCAP

Warranty

Reman

Child Restraint Systems

Safety belts Seats

Safety glazings

AEB / AES

SAS

LSS

AD

Occupant status

Virtual Testing

Front impact

Side impact

Pedestrian safety

Whiplash

Child safety

Rescue

WG: Working group

EG: Expert group

S-EG: Sub- Expert Group

Participation subject to a fee

WG TR-Technical Regulations

The Working Group Technical Regulations is in charge of preparing, promoting and advocating CLEPA positions on a wide range of regulatory issues, spanning from road safety, automation and connectivity to sustainable transports, electrification, advanced materials and fuels. It also covers resources efficiency, circular economy and life-cycle-assessment. All these objectives are supported by the Working Group on Technical Regulations also by promoting and fostering global harmonisation and regulatory convergence.



Automation, connectivity, cybersecurity, resource efficiency, circular economy and life-cycle assessment are great opportunities for the automotive industry. Suppliers are transforming these opportunities into safer and cleaner mobility evolutions, saving lives and protecting the environment”

Martin Gerstl, Bosch, Chairman of the WG Technical Regulations

CAF- CLEPA Aftermarket Forum

The CLEPA Aftermarket Forum is a high-level group deciding which aftermarket related topics CLEPA should focus on, evaluating the trends affecting the automotive aftermarket and the possible scenarios in a rapidly-changing marketplace. The group also provides guidance on current political topics like “Digitalisation in the Aftermarket”, “Access to In-vehicle Data and Resources”, “New Type Approval”, “REMAN-Circular Economy”, “Motor Vehicle Bloc Exemption Regulation (MVBBER)”, “Spare Parts Identification” and “Design Rights” and acts as a sounding board for aftermarket related activities at CLEPA. The WG Aftermarket reports to the Board and aligns official positions and the advocacy strategy with the Governmental Affairs Strategy Group. The Working Group shares opinions with the Legal Advisory Group and the Trade Working Group.

WG Telematics

The WG Telematics provides expertise on all questions about digitalisation in the aftermarket including vehicle connectivity with relevance for digital data based business models. The group evaluates the feasibility and the impact of available and possible technical and economic options for Access to In-vehicle Data and Resources and other digital future businesses, e.g. new data based mobility services. The working group also provides input to public consultations, aligns with other associations and stakeholders and prepares CLEPA's positions for the political discussion and advocacy work. The group is currently reviewing the terms of reference and discusses the future expansion of the scope of responsibilities from “Telematics” to “Digitalisation in the Aftermarket” or even beyond.

LAG- Legal Advisory Group

The CLEPA Legal Advisory Group renders legal advice on proposed EU legislation, existing, future laws and administrative regulations. This includes changes to contract and liability law, commercial and corporate law, competition and antitrust law, industrial property and copyright law and insurance. The Group also shares experience with regard to the various national legal systems. In particular, the LAG examines the legal challenges brought about by emerging digital and new technologies and services, covering connected autonomous vehicles, Internet of Things and AI-based systems.



The potential liability regime for emerging digital new technologies and for connected and autonomous vehicles highlights the need for legal expertise and informed decision making within the automotive supplier's sector, supported by the role of the CLEPA Legal Advisory Group."

Michael Georgi, ZF Group, LAG Chair

WG Trade

The Trade WG is composed of trade and customs experts from member companies and associations, whose objectives are to influence the current Free Trade Agreement negotiations and to shape new ones, to tackle market access barriers in 3rd countries and to influence proposals coming from the Union's Customs' codes and those of the World Customs Organisation.

The group focuses on the latest insights on free trade agreements, trade disputes and other global market access and restriction developments, to enable the formulation and promotion of trade positions worldwide.



Trade issues are dominating our daily agenda, with a changing scene that affects purchasing decisions throughout the global supply chain. The need of an European aligned position highlights the role of the CLEPA Trade working group, that meets regularly to follow and align on the latest trends"

Stephan Müller von Kralik, Webasto, Chair Trade WG.

Communications

In the last phase of this Parliament and Commission, CLEPA has promoted the industry as an essential partner in shaping mobility of the future. The various annual events of the association continue to be forums where fruitful exchange takes place among industry players and stakeholders. This year, the association secured a high level of interactions and opportunities to showcase the latest technologies to representatives of the European institutions.

CLEPA also works to raise the visibility of the industry at an international level. The association has close ties with international media and global partner associations and has an influential voice on the last trends in mobility, research and innovation.

Events

Aftermarket Conference 2019:

Looking with a critical eye the increasingly digitalised sector, the edition of the 10th CLEPA Aftermarket Conference focused on the importance of leadership and new professional skills. The event hosted three sessions gathering very different profiles, from headhunting companies to e-commerce platforms, that introduced external views and perspectives on new ecosystems and business for the upcoming years. The Conference was preceded by a networking cocktail and complemented by an exhibition, and continues being the largest aftermarket event in Europe.



Frank Schlehuber, Senior Consultant Market Affairs opens the 10th Aftermarket Conference



Panel debate at the Conference



Materials Regulations Event 2019

Materials Regulations Event 2019:

The CLEPA Materials Regulations Event brings together high-level representatives from the entire automotive industry. Now on its 12th edition, it has been recognised as a perfect platform to discuss technical issues related to materials and the most recent legislative developments at European and international level, but also which are the activities performed by other partner associations from Asia and America. This year, topics on the agenda included the REACH, IMDS, GADSL, ELV and Brexit. Organised by CLEPA, this event was held on the 21st and 22nd May 2019 in Stuttgart.



CLEPA Materials Regulations Event 2019 in Stuttgart



Innovation Awards 2019

CLEPA Innovation Awards 2019:

In its 4th edition, the association received over sixty applications from companies of all sizes, from multinational companies to SMEs. The Awards competition and ceremony, supported by Deloitte, was held at the Museum of Natural Sciences in Brussels and showcased the most forward-thinking ideas in the fields of: safety, cooperation, environment and connectivity and automation, demonstrating the advantages of the suppliers technology to EU decision makers.



CLEPA Innovation Awards 2019 trophy

Other events

CLEPA Warranty Conference Warranty and quality specialists from automotive suppliers met at the 2018 CLEPA Warranty Conference in Frankfurt on 18 September 2018 to discuss the future challenges in managing warranty and how to deal with "Warranty in a digital world".

CLEPA Counterfeit day Specialists from law enforcement, politics and technology providers exchanged their views on the latest developments and state of the art technologies to prevent counterfeiting.

Webinars for members, analysing topics such as Brexit, market updates and compliance policy.

European Parliament event "Driving Innovation Forward" CLEPA, together with the European Forum for Manufacturing, hosted a dinner debate at the European Parliament, focusing on the importance of innovation for preserving and boosting European leadership in the mobility sector.



Driving Innovation Forward event at the European Parliament


Forum for Mobility and Society, a multi-stakeholder group led by key MEPs focusing on road safety, urban mobility and decarbonisation, organised several events to facilitate information exchange and debate.



Media presence & social media channels

 **1321** followers
(vs. 980 in 2018)

 **1757** followers
(vs. 1075 in 2018)

 TV interviews on Euronews and CNN

Wide media outreach on Co₂ emissions policy:

436 topic-relevant publications in the last 6 months in media outlets Europe-wide Including top influential media with wide readership, such as Euronews, CNN, Financial Times and El Mundo

Publications

Press releases

CLEPA published more than 25 press releases highlighting the most relevant topics: such as decarbonisation, CO2 regulation, Brexit, trade, sector competitiveness, research and innovation, financial schemes, etc.

Newsletter

More than 200 articles featured in our monthly newsletter, including each time an editorial.

European elections series

The CLEPA team produced a dedicated newsletter for members informing on key aspects of the European elections, with detailed analysis on the new power balance that will emerge in the EU institutions, along with our expectations on the impact to the automotive supplier industry, as a whole, as well as on our outreach strategy towards policy-makers in Brussels



Position papers

- C-ITS delegated act: five facts
- CLEPA position on "short range" V2V, V2P and V2I within C-ITS communication technologies (5.9 GHz frequency band)
- Intelligent Transport Systems (ITS)
- Waste Framework Directive Database
- European Automotive Industry Statement on Brexit
- ACEA-CLEPA Position on European Commission Plastics Strategy
- Reduction of Urban Pollution
- Revision of the General Safety Regulation

Brochures

- Innovation Awards
- Members catalogue



White Book

CLEPA will be launching in 2019 a White Book with a vision on the future of mobility from the perspective of the automotive suppliers, marking the 60st anniversary of CLEPA. The document will describe automotive advancements past, present and future, highlight how automotive suppliers are part of the solution and make recommendations with regard to policy and regulations.

The paper will be supported by a communication campaign.



ENSEMBLE

Other Activities

EU Projects

ENSEMBLE

ENabling Safe Multi-Brand pLatooning for Europe

The ENSEMBLE consortium will implement and demonstrate multi-brand truck platooning on European roads over three years (2018-2021). This paves the way for the adoption of multi-brand truck platooning in Europe that will improve fuel economy, CO₂ emissions, traffic capacity and throughput for the road freight sector, where several European automotive suppliers will support the OEM implementations.

The main aim of the ENSEMBLE project is to ensure safe platooning when using different branded trucks and carry out impact assessment for infrastructure, road safety and traffic flow. Traffic and road authorities will be approached to jointly define road approval requirements. Platoon Operation Levels will be defined to guide the design of different platooning functionalities and strategies, reflecting the full diversity of trucks with platooning functionality.

Through real-world testing across national borders the impact on traffic, infrastructure and logistics will be assessed, whilst gathering relevant data of safety-relevant scenarios and necessitating harmonisation of approval requirements.

With the possibility of multi-brand platooning available for trucks driving on European roads, a single truck can form a platoon with any other truck. This could result in fuel savings for a large group of vehicles on today's roads. Moreover, it will influence traffic flow, especially on highly congested corridors. Platoons will appear in normal traffic, causing smoother traffic and higher vehicle density and thus improving road throughput. Thanks to automated dynamic control between the trucks, truck operations are safer and less stressful. At highway entries, exits and junctions platoons will automatically increase vehicle gaps to give way to other road users



DRIVES

New skills for new mobility concepts

Starting 1 January 2018, the project "Development and Research on Innovative Vocational Education Skills" (DRIVES) – a Sector Skills Alliance within the Erasmus+ programme – brings together the European automotive industry, training centers, local public authorities and other relevant stakeholders for the development of automotive skills, with a view to address the challenge of the skills shortage.

The aim of the project is to enable the realization of the aims of the Blueprint, namely the delivery of human capital solutions to supply chain SMEs through the establishment of an Automotive Sector Skills Alliance covering all levels of the value chain (vehicle production, automotive suppliers and automotive sales and aftermarket services).

ARCADE

Aligning Research & Innovation for Connected and Automated Driving in Europe

Technologies for connected and automated driving can largely contribute to increasing the efficiency and safety of the transport system. Starting with 1 October 2018, ARCADE project will work on bringing connected and automated vehicles a step closer to the European roads.

ARCADE (Aligning Research & Innovation for Connected and Automated Driving in Europe) aims to coordinate consensus-building across stakeholders in order to enable smooth deployment of connected and automated driving (CAD) on European roads and beyond. The project supports the commitment of the European Commission, Member States as well as industry to develop a common approach to development, testing, validation and deployment of connected and automated driving.

The ARCADE project will build upon the successful work done and the strong joint networks already established within the CARTRE and SCOUT Projects.

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BoD status: End of May 2019

* Nominated Vice-President for approval at General Assembly 2019

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- Communications
- Governmental Affairs
- Market Affairs
- Operations
- Research & Innovation
- Technical Regulations

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