



European Association of Automotive Suppliers

European suppliers claim strong global leadership

Call on EU policy makers to prioritise innovation and sector transformation

CLEPA-the European Association of Automotive Suppliers

Driving innovation forward since 1959



CLEPA represents
over **120 global**
suppliers

13 national
associations



56% of the total
turnover is
generated by 38
CLEPA Members

21 countries



CLEPA represents more than 3,000 companies and cover all products and services within the automotive supply chain.

European suppliers at a glance



Annual sales:
600 billion EUR



European employment
in the automotive
supplier industry:
5 million



Annual investment in R&D:
25 billion EUR

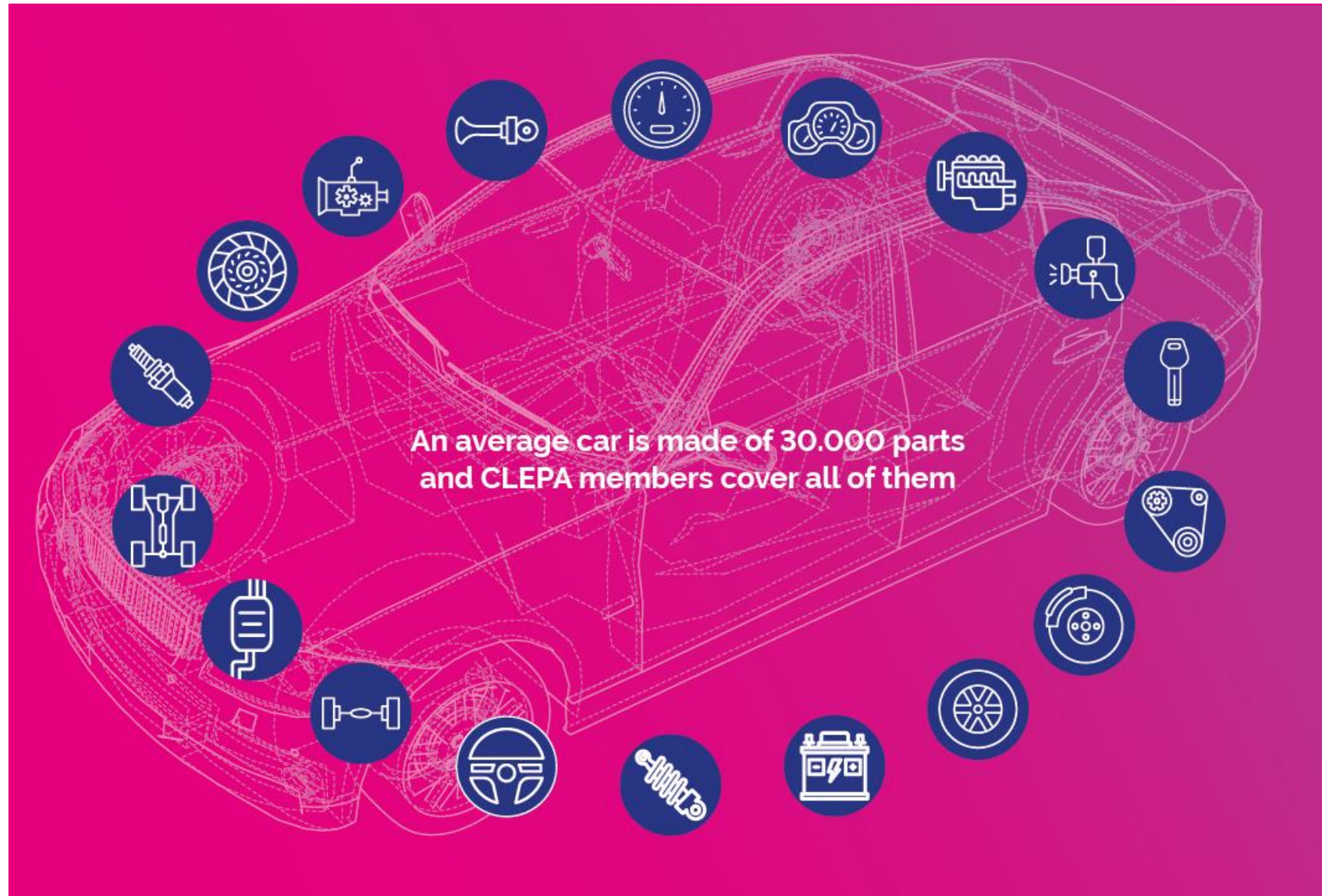


Number of patents
registered each year:
9,000



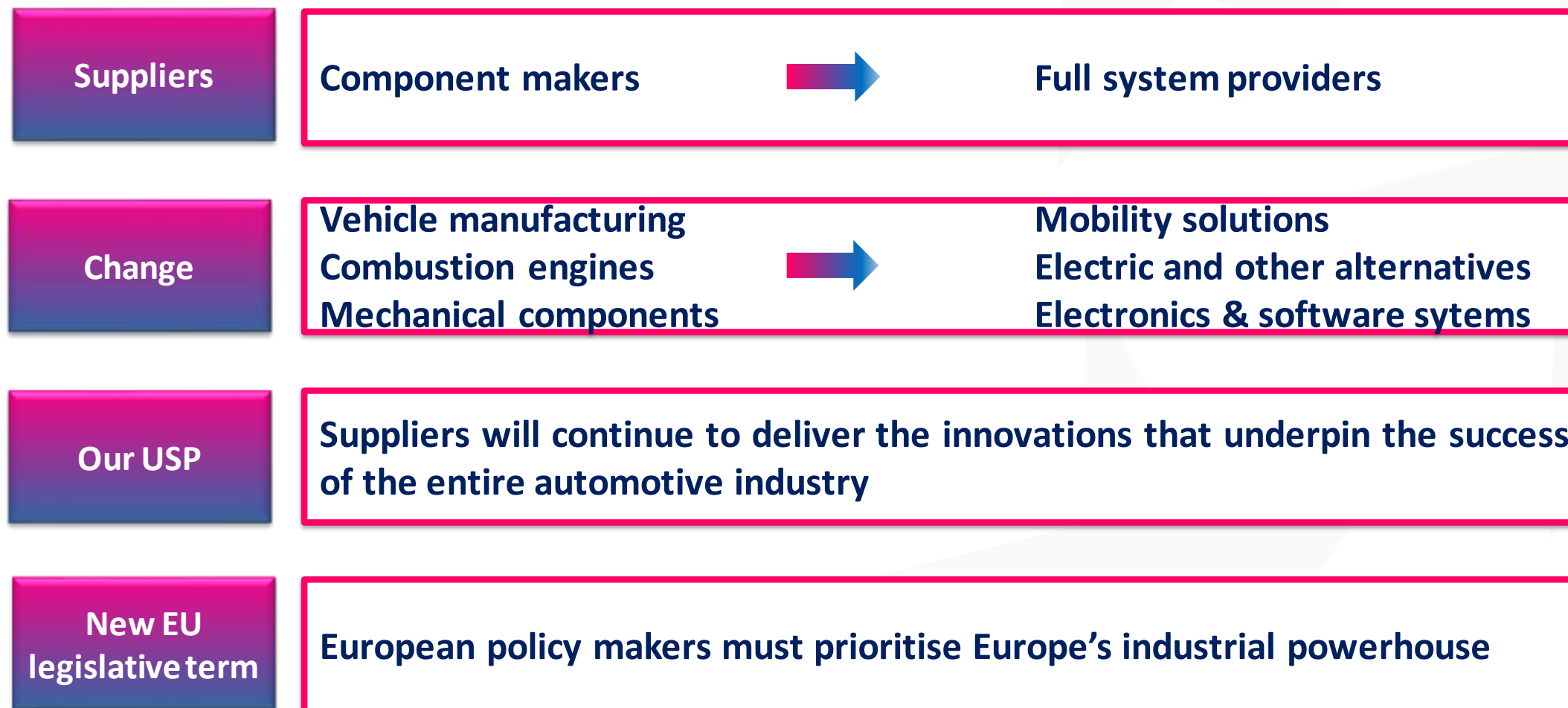
Annual trade volume:
65 billion EUR

European suppliers at a glance



European leadership

Systemic change



Europe stands at crossroads

Industrial competitiveness is under pressure



Global competition
Protectionist tendencies

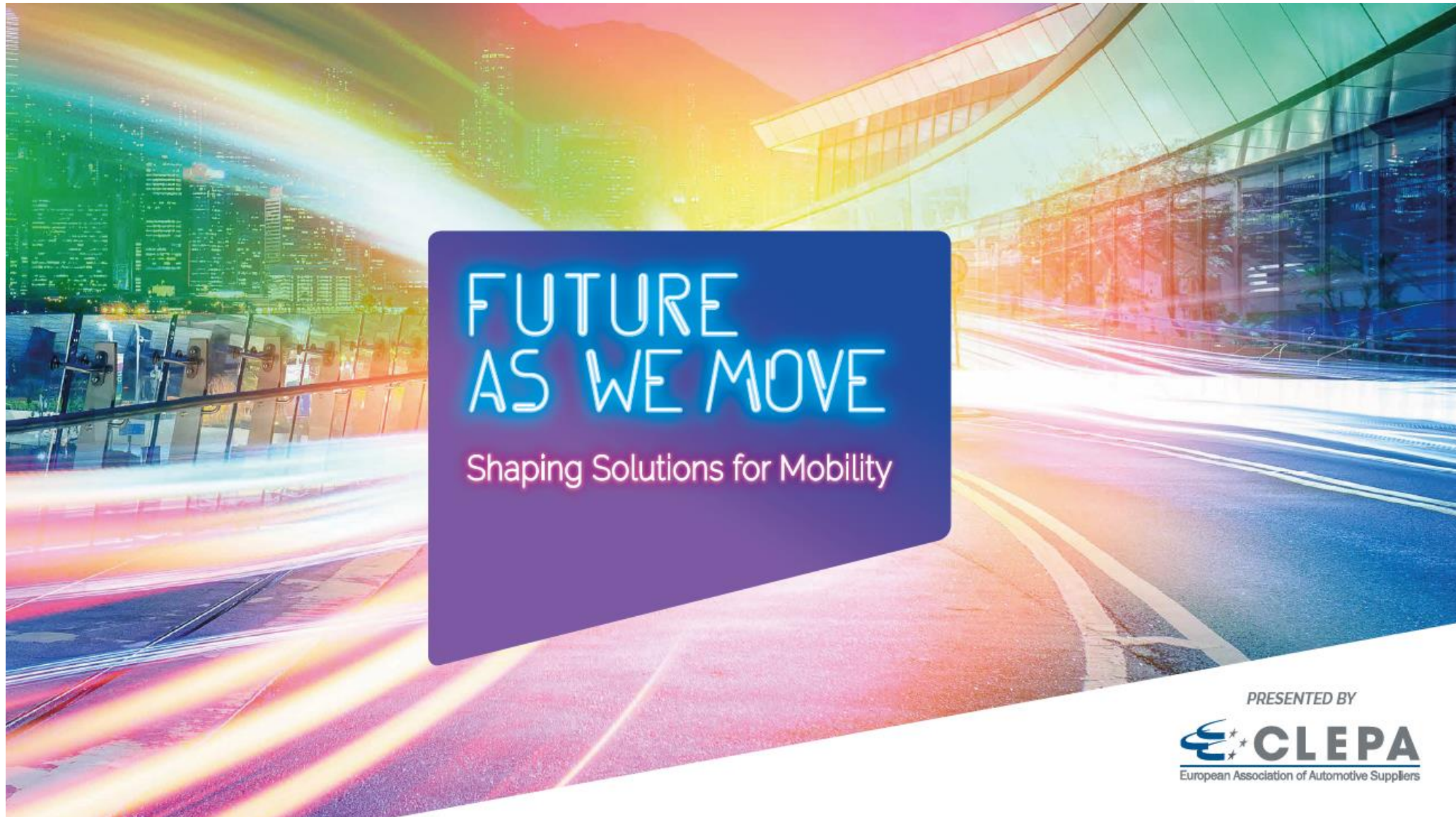


Strains of regulatory
demands & deficiencies
in the EU

Call for action

- **Restore technology-neutral framework; enable technology leadership**
- **EVs: roll-out charging infrastructure; coordinate market support**
- **Support vulnerable regions & workforce**
- **Be assertive in the global arena**

Our vision



PRESENTED BY



The future is...

Safe

Sustainable

Smart

Competitive

**Biggest transformation of the industry in more than a
hundred years**

Our job to deliver, with Europe in the lead



Promoting a **functioning, reliable and innovation-friendly** legal framework

Reducing internal barriers

Kick-starting **demand** for alternative drivetrains



Ambitious European CO₂ targets for 2030



-37.5%



-31%

Emissions reduction

To make this possible by 2030, 40-50% of Europe's vehicle fleet will have to be

- 1 Plug-in hybrid (PHEV)
- 2 Fully Electric (BEV)

2018

2030



How to facilitate this?



Consumer confidence in the technology



Battery charging infrastructure



Increase the sales in the mass market



Restoring the **principle of technology neutrality** to achieve Paris climate goals

Current **technology choice is driven by regulation**, not the market

Longer term, a **broader approach** is needed

Diversity in mobility requires variety of powertrain options



Internal combustion engine vehicle



Battery Electric Vehicle (BEV)



Fuel Cell Electric Vehicle



Hybrid Electric Vehicle (HEV)



Plug-in Hybrid Electric Vehicle (PHEV)



Range Extended Electric Vehicle (REEV)

Competitive

Call for action



Assertive attitude in global arena

Favouring multilateral trade agreements

Avoiding trade wars:
damaging to receiver as much as to imposer

Leveraging Europe's strong economic position



Competitive

Call for action



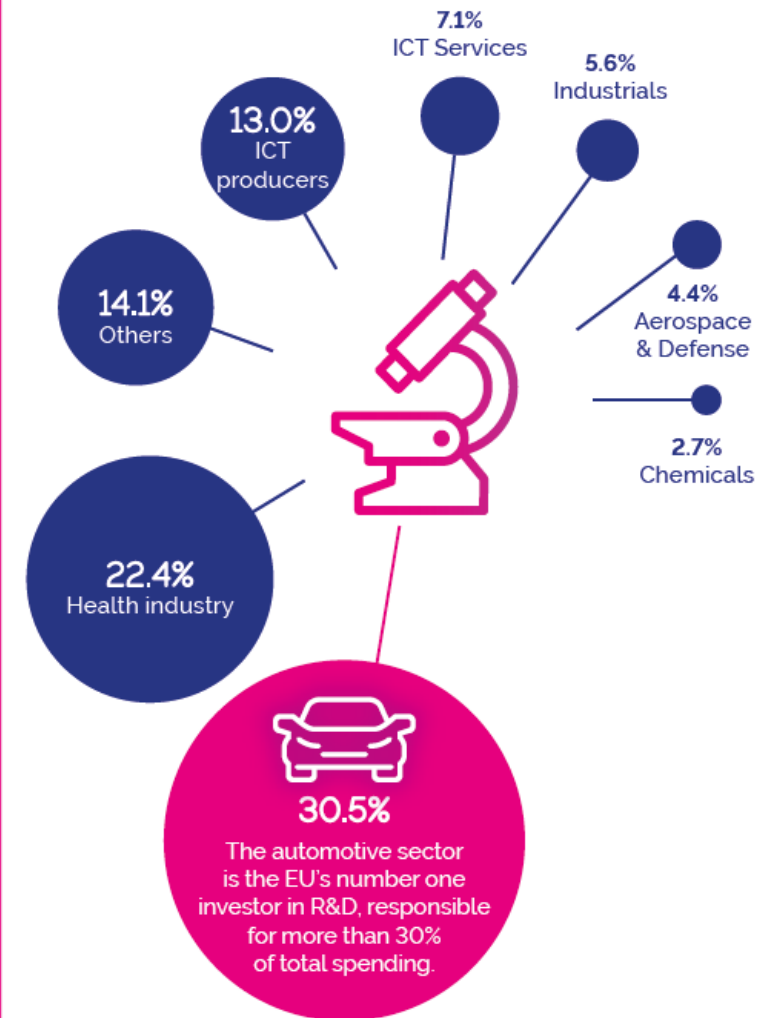
Realising the target for **industry**
to be **20% of GDP**

Fostering innovation

Gearing efforts towards **critical
technology fields**

Compete for **global technology
leadership**

EU R&D Investment by sector in 2018



Call for action



Enabling young talent: the mobility industry offers an exciting future

Recognising automotive innovation as key asset for Europe

Four times as many software lines in a car as in an airplane



Conclusions



Transformation poses **threats and opportunities**

More **decisive and concerted efforts needed** for successful transition to **world of new mobility**

Automotive suppliers deliver on their commitments and want Europe to lead

"Our vision,
is an
optimistic
one"

THANK YOU!

www.futureaswemove.eu



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