



JAMA-CLEPA
BUSINESS SUMMIT

JAMA-CLEPA Business Summit

Venice, 27 & 28 October 2016

*European automotive suppliers meet
Japanese vehicle manufacturers*



Panel Debate

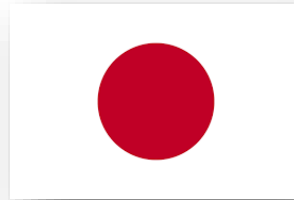
*European automotive suppliers meet
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Autonomous Driving: From a Dream to becoming Reality

- The *Auto Industry Game* is shifting
- OEM and supplier cooperation model will change
- Priorities from supplier perspective to support OEMs:
 - a) Refine proven technologies
 - b) Global scale & speed
 - c) Innovative product solutions for key mega trends:
 - Electrification
 - Shared Mobility
 - Autonomous Driving

Stephen Roser

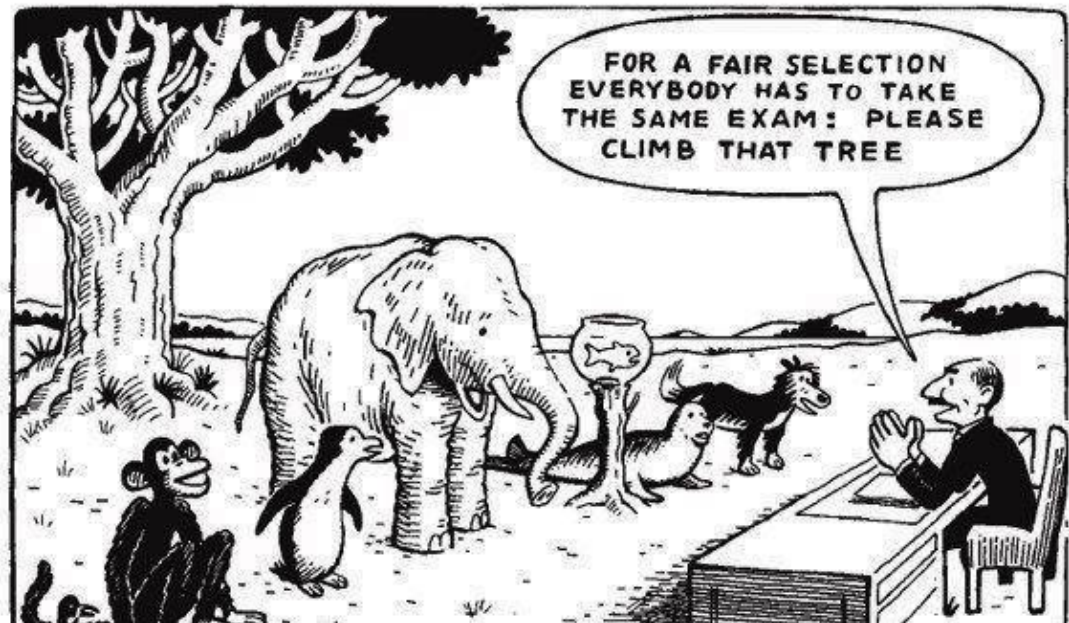
Aisin Europe Senior Director



Harmonisation

- Commercial
- Technical
- Trade

Realistic or optimistic?



Hideya Aoki

Continental Segment Head

Mobility is changing

Challenges for Society and the Automotive Industry

Emission



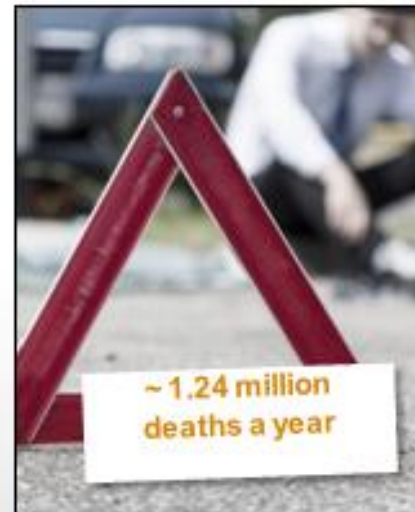
EU regulation:
CO₂ emission reduced
to 95 g/km in 2020

Traffic Collapse



ITS activities all over
the world

Accidents



US traffic safety
regulation:
ESC standard by 2012

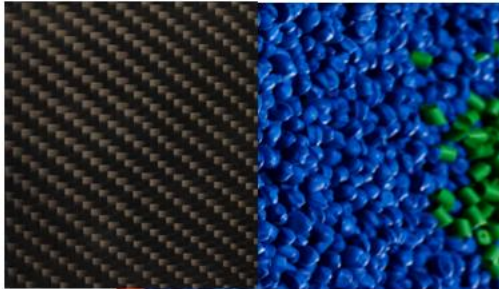
IoE



2020:
> 50 billion connected
objects

Achim Weber

Maxion Wheels Executive Director



MaxFibersteel™

Hybrid Wheel

Flexible Wheel

MaxStyle

MaxSmart

- Focusing on Driving experience, efficiency, weight, styling, connectivity and cost
- Partnering with industry leaders, start-ups + universities
- Enabling “Fast track innovation”



Open Data

Modern car can
produce
5GB/hour
sensor data

60m cars
manufactured
per year

If driven 1.5
hours a day
that's **164
Exabytes**

- Ownership?
- Privacy and Data Protection?
- Responsibility?
- Value Proposition?



"Before I write my name on the board, I'll need to know how you're planning to use that data."

OCTO

Michael Hawes

SMMT Chief Executive

Article 50
trigger by
end March
2 year
deadline

"Brexit
means
Brexit"



Immigration
is a red line

Automotive
is a priority
sector

Great EU
repeal Bill in
Queen's
speech (May
2016)










- Government will not give a 'running commentary' on Brexit
- UK is seeking strong international engagement – note key interventions from Japanese Govt & US advice on prioritising EU relationship over UK
- UK government is preparing sectoral impact assessments
- Twin-track approach: secure exit & new relationship
- UK will likely seek a 'bespoke' relationship



Michael Hawes

SMMT Chief Executive

WTO auto
tariffs: 10%
car, 2.5-4.5%
parts

		Access to Single Market								
	Votes on EU law	Tariff free trade	Customs Union & external trade	Level playing field for business	'Ever closer union'	Justice & Home Affairs	Free movement of People	Schengen border-free area	Contribution to EU financing	Eurozone membership
UK current membership 							Note UK secured emergency break		Note UK rebate exists	
Standard EU membership 										
Norway (non-EU EEA) 										
Bilateral agreements   	Swiss									
	Canada (CETA)									
	Turkey (Customs Union)									
WTO 		Except where EU has bound tariffs 0% in WTO commitments		Except where EU has commitments under General Agreements						



**SHARED EUROPEAN
AUTOMOTIVE PRIORITIES FOR
THE EU'S FUTURE RELATIONSHIP
WITH THE UK (draft)**

- Continuation of the UK within the Single Market
- Regulatory continuity in the automotive sector
- Access to talent across the European automotive industry
- Alignment of trade priorities and accumulation zones between EU and UK for Free Trade Agreements with third countries
- Continued collaboration on automotive priorities



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Thank you for your attention!
ご清聴ありがとうございました。
Grazie per l'attenzione!

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