CLEAN & SAFE MOBILITY

SMART & CONVENIENT ROAD TRANSPORT

AFFORDABLE MOBILITY & CHOICE FOR ALL

A THRIVING & COMPETITIVE INDUSTRY

LEADING THE MOBILITY TRANSFORMATION

The future of the EU auto industry

MANIFESTO 2019 – 2024

Introduction

The European automobile sector continues to be the backbone of mobility, employment, economic growth and innovation in Europe, contributing over 7% of the EU's GDP.

Today, however, the **industry is facing a number of unprecedented challenges:**

- Confidence in the industry has taken a serious blow.
- The centre of economic gravity is shifting to other regions, notably Asia.
- New players are entering the market and disrupting existing business models.
- The global trade environment is becoming increasingly uncertain.
- A growing wave of new technologies and trends, including digitalisation and decarbonisation, is redefining mobility as we know it.

In these times of transition, the auto industry is **committed to work closely with EU policy makers** and other stakeholders to ensure that these challenges can be overcome – and indeed turned into **new opportunities for Europe**.

Our industry is ready to lead this transformation hand-in-hand with policy makers. Together we have the common aim and **shared responsibility to ensure that the EU auto sector can maintain its global leadership in the future**.

In light of the new term of the European Commission and the European Parliament, the purpose of this manifesto is to put forward four main pillars to foster collaboration over the next five years.

DELIVERING CLEAN & SAFE MOBILITY

OBJECTIVE

Enable the transition to zero emissions and zero fatalities

WHAT OUR INDUSTRY OFFERS

- An **increasingly wide-ranging and diverse offer of zero- and low-emission vehicles** (ZLEVs).
- Vehicles that will continuously emit less pollutants, stepping up our contribution to **cleaner cities and a healthier environment**.
- Cutting-edge active safety technology for vehicles, enhanced by cooperative and automated systems, that can help to **prevent accidents from happening.**
- Better communication with citizens on safe driving and a **more effective use of those safety features already available** in their vehicles.

WHAT EUROPE SHOULD DO

- Draw up a **comprehensive plan for the transition to low- and zero-emission mobility**, as has already been done in China and the United States.
- Develop appropriate strategies and enabling conditions to deal with the wider implications of this shift, notably on:
  - The lack of **recharging and refuelling infrastructure**, including leveraging EU funding instruments;
  - The very **different skills and training** required for the production, maintenance and recycling of ZLEVs;
  - The impact of the ZLEV transition on **today's jobs and key automotive regions**;
  - The **production and recycling of batteries**, as well as securing the availability of affordable raw materials.
- Provide a **consistent and realistic roadmap** for the development of future CO2 emission standards for cars, vans, trucks and buses.
- Ensure the **better coordination of climate change and air quality policies**, including assessing the impact of any future Euro standards for pollutant emissions.
- Collect and analyse EU-wide accident data to have a more **solid knowledge base for choosing further safety measures**.

MAKING ROAD TRANSPORT SMART & CONVENIENT

OBJECTIVE

Firmly establish the EU as the global leader in consumer-focused, innovative mobility solutions

WHAT OUR INDUSTRY OFFERS

- The **world's strongest investment in automotive R&D**, amounting to €57.4 billion per year or 28% of total EU R&D spending.
- **37.2% of all patent applications related to self-driving vehicles** since 2011, putting Europe ahead of China (3%), Japan (13%) and the United States (33.7%).
- Targeted and **flexible solutions for each mobility reality** or transport use case, matching the unique characteristics of each of Europe's many urban areas and more than 300 regions.

WHAT EUROPE SHOULD DO

- Launch **European flagship initiatives focussing on mobility innovation** that bring together universities, research centres and players from across the entire automotive value chain.
- Support the development and roll-out of connected and automated driving.
  - **Remove regulatory obstacles** to the (cross-border) deployment of new mobility technologies.
  - Enable **rapid deployment of the required digital communications infrastructure** (V2X) to complement existing transport and road infrastructure.
  - Adopt a **clear roadmap for the introduction of increasing levels of automation**.
- Enable innovation in **new data-driven mobility business models**, as well as on-demand transport solutions and vehicle ownership models.
- Take a 'consumer-focused' approach, by adopting mobility and transport policies that **respond to changing consumer habits and needs**.

ENSURING AFFORDABLE MOBILITY & CHOICE FOR ALL

OBJECTIVE

Meet the diverse mobility and transport needs of all Europeans, regardless of their financial means

WHAT OUR INDUSTRY OFFERS

- A broad choice of different types of vehicles, across various price segments, providing **suitable solutions for different budgets**.
- Even **more powertrain options to choose from** in the future, each serving specific communities and mobility needs – ranging from inner-city delivery and regional commuting to long-distance travel.
- Continued **investment in new mobility services**, including on-demand models (such as carsharing, ride-hailing and ridesharing) and innovative logistics concepts.

WHAT EUROPE SHOULD DO

- Create adequate and favourable market conditions for the uptake of ZLEVs in all member states through financial and non-financial incentives, **making cleaner vehicles affordable for all layers of society**.
- Recognise that decarbonisation can only happen at a **pace that is supported by society as a whole**.
  – New rules and regulations should not have a negative impact on the freedom of mobility of people with limited means.
- **Ensure technology neutrality** when it comes to alternative powertrains to ensure that innovation triggers the best solutions for consumers.
  – Imposing specific technologies only limits choice and constrains innovation; Europe will only thrive if people are provided with more choice instead of less.
- Put the principle of 'co-modality' at the heart of future EU transport policy. All **transport modes should be integrated in a complementary way**, including privately-owned vehicles.
- Address consumer uncertainty by **tackling the growing patchwork of urban vehicle access restrictions**, and their lack of coherence with the EU internal market rules.

SAFEGUARDING A THRIVING & COMPETITIVE INDUSTRY

OBJECTIVE

Ensure that an economically-sustainable auto industry can continue to contribute to EU growth and jobs

WHAT OUR INDUSTRY OFFERS

- A turnover representing **more than 7% of the EU's GDP**.
- Direct and indirect **employment for 13.8 million Europeans** (6.1% of the EU employed population) and over 11% of total EU manufacturing employment (3.5 million jobs).
- Some **€428 billion in tax contributions** in the EU-15 member states alone.
- Exports generating a **trade surplus of €84.4 billion** for the European Union annually.
- A global presence, both through exports from Europe as well as through **collaboration and partnerships** outside Europe.

WHAT EUROPE SHOULD DO

- Pursue a **unique 'European way' forward**.
  – Instead of emulating other regions that are betting on specific technologies, we should **leverage the EU's own technological and market strengths**, which lie in its ability to provide diverse and tailored mobility solutions.
- Develop an **EU industrial strategy for the automotive sector** to safeguard its competitiveness.
- Encourage the adoption of **globally harmonised standards and regulations** by enhancing international cooperation and fostering the EU's leadership role.
- Maximise on Europe's position as a global export champion.
  – Reinforce the **multi-lateral and rule-based trading system** within the WTO.
  – Adopt an EU trade policy that enhances the **competitiveness of the EU's manufacturing industry**, including supply chains, at the global level
  – Continue to **pursue ambitious bilateral trade negotiations** (including the framework of the future EU-UK relationship);
  – Establish a **realistic strategy on access to the raw materials** which are necessary for new technologies.

ACEA REPRESENTS

BMW Group

CNH INDUSTRIAL

DAF

DAIMLER

FCA FIAT CHRYSLER AUTOMOBILES

Ford

HONDA The Power of Dreams

HYUNDAI

JAGUAR LAND ROVER

PSA GROUPE

GROUPE RENAULT

TOYOTA

VOLKSWAGEN AKTIENGESELLSCHAFT

VOLVO

VOLVO

ACEA

European
Automobile
Manufacturers
Association

ACEA represents the 15 major Europe-based
car, van, truck and bus manufacturers

www.acea.be
+32 2 732 55 50
communications@acea.be

twitter.com/ACEA_eu linkedin.com/company/acea youtube.com/ACEAeu