

**ON THE ROAD TO THE EU RECOVERY:
Local perspective by the industry**

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1. Current situation and Recovery
2. ZVEI Vision for a long-term industry strategy
3. How to spend it „investment plan“
4. Single Market: Focus on harmonization and standardization

European companies face tremendous challenges

- meet the objectives of the green and digital transitions,
- fight the consequences of the Covid-19 pandemic,
- facing shake-up of multilateral system and increased difficulty in accessing global markets,
- economic pressure from polarization around USA and China
- increased regulatory burdens (e.g. transparency and sustainability reporting, databases such as ECHA/SCIP, new demands for company responsibilities for all partners along the complete supply chain)
- Revised SME strategy is nice but companies need a more coherent approach between political initiatives and regulatory reality

COMPET Council Conclusions 16 November

"A recovery advancing the transition towards a more dynamic, resilient and competitive European industry"

- Council stresses the **need for European solidarity** to master a swift, sustainable and inclusive economic recovery and a long-term sustainable future of the EU industry impacted by the COVID-19 pandemic.
- It reiterates that the **green and digital transition** and the EU economic recovery should be just and built around the principles of competitiveness, Single Market integration, sustainability, cohesion, inclusiveness, circularity and environmental protection, solidarity and observe social standards.
- It reaffirms the importance of achieving **strategic autonomy while preserving an open economy** in the most sensitive industrial ecosystems and specific areas, such as health, defence industry, space, digital, energy and critical raw materials.

Ursula von der Leyen announced the **revision of the EU industry strategy** : 37% green & 20% digital

10.03.2020

A New Industrial Strategie for Europe



Spring 2021

Revision: Post-Corona Recovery & Next Generation EU

März 2020

Frühjahr 2021

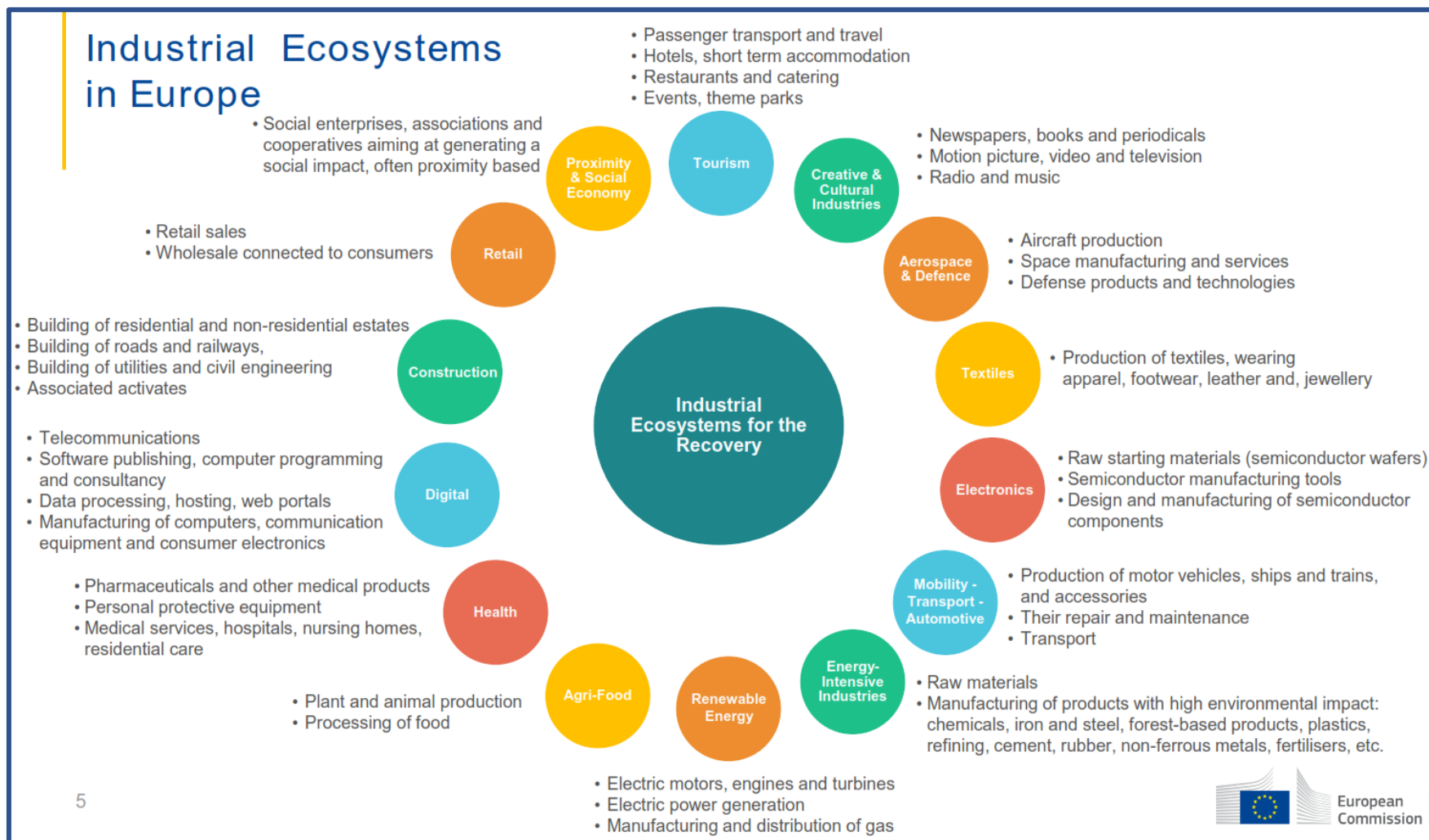
Today

Green Deal must deliver – Innovation must be priority

- The EU can only lead as global role model in climate protection if we manage the green transition while maintaining intact value chains, jobs and the competitiveness of our companies.
- The Green Deal and its new targets need a credible industrial strategy (a real business plan) to mobilise the necessary investments, including in R&D, in green technologies, become climate-neutral in a cost-effective way.
- The digital transformation of our economies and societies needs support by the creation of the right conditions for the safe deployment of new technology such as AI and 5G, as well as for the industrial data economy and incentivizing data sharing through Common European data spaces

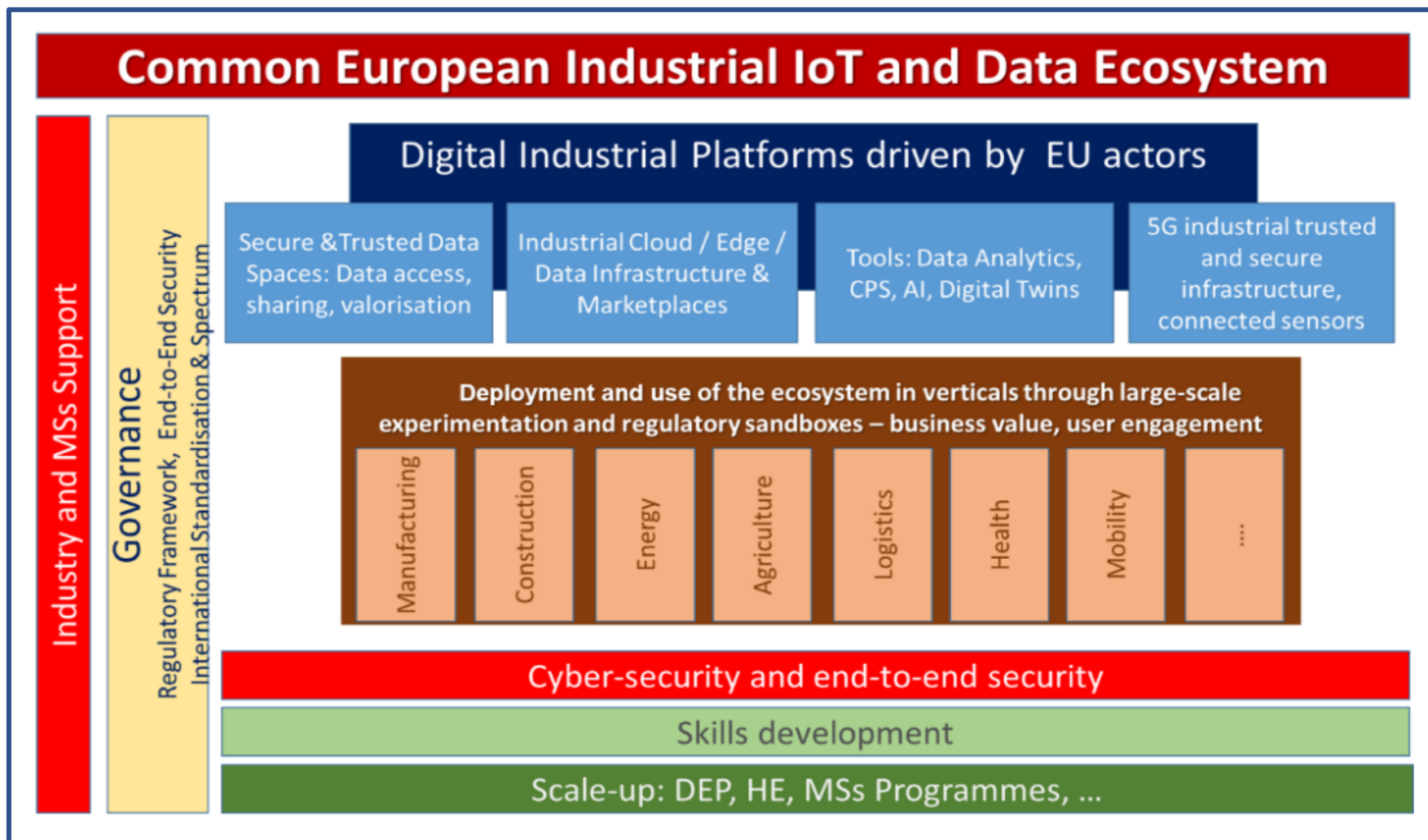


EU Commission's industrial Ecosystems



- Situation in 2020
- In the light of the COVID-19 pandemic
- Assessment of the status quo of the industry
- Short-term recovery focussed
- The concept misses connections between the Ecosystems
- Needs further development for the upcoming EU industry strategy 2.0
- Missing cross-sectoral regulation, innovation, and standardisation.

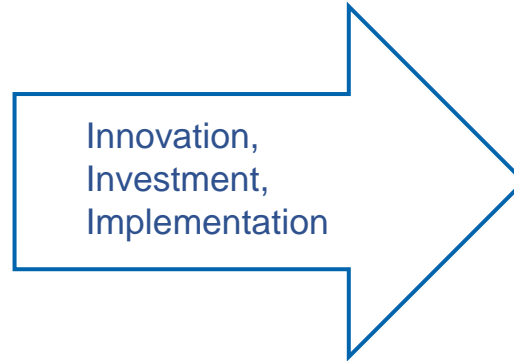
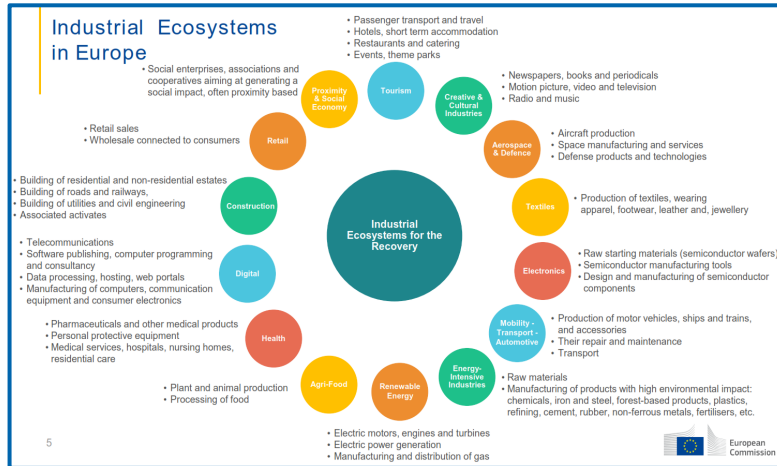
Our industries' vision for a future proof Europe



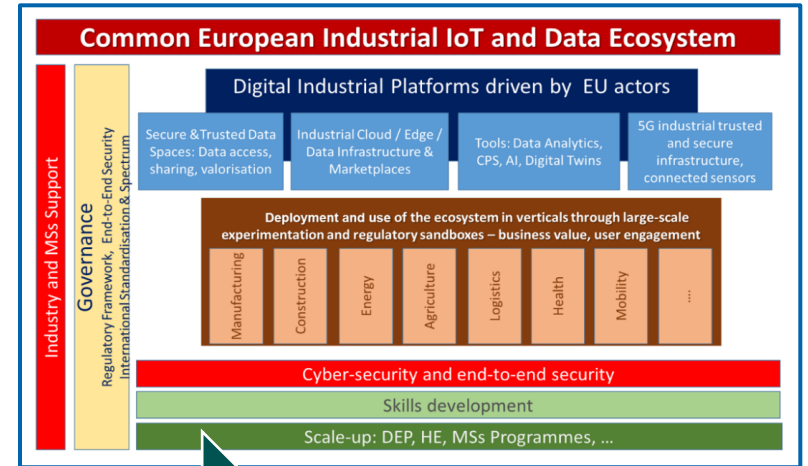
- Vision: This should be Europe in 2025/2030
- Medium- and long-term strategy of important issues beyond recovery
- Integrates all sectors/ecosystems
- Build on the IPCEI strategic forum report
- Holistic approach on key technologies
- Integration of cross-sectoral regulation, innovation, and standardisation.

ZVEI Vision for a long-term industry strategy

2020: Corona/Crisis Recovery



Vision 2030: Future Proof Europe



Digital & Advanced Manufacturing

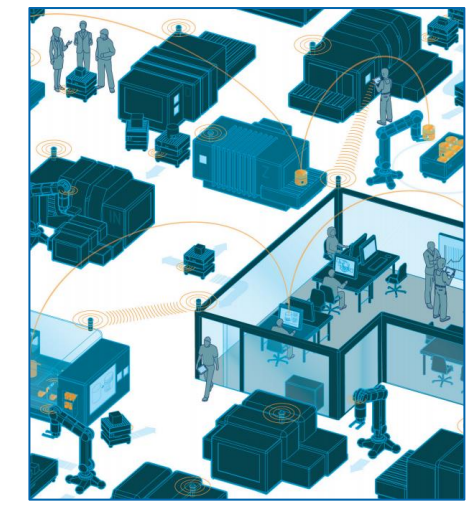
- Europe's industrial strength
- Enables, connects and, operates all industrial sectors
- Precondition for a digital and green twin transition
- 770.000 Companies with 11.5 Million Employees
- Strong footprint in global trade
- Strategic importance

Value Creation Networks

- Includes all Stakeholders: Public & Private, Europe & Global
- No linear process, but bi-directional and multilateral
- Reflects Industry 4.0 production processes and services
- OT-IT Cooperation: Links Office- & Shop-Floor

Industrial Internet of Things

- Focus on specialized requirements of applications in all industry segments
- Set up to harvest, store and structure data
- High market potential in Europe
- Centre of the digital transition of Europe's industry
- IPCEI projects for IIoT



Digital Investment Plan from Digitaleurope



Digital education, skills and inclusion

1. A European digital upskilling and reskilling programme
2. Using artificial intelligence to predict the jobs of the future



Digitalizing SMEs and scale-ups

3. Boosting SME growth and cross-border trade through a Europe-wide e-Administration portal
4. Unlocking open public data to empower scale-ups



Digital transformation, innovation and the Green Deal

5. A digital 'Renovation Wave' and a modernized construction sector



Connectivity and infrastructure

6. Boosting growth of traditional sectors through 5G connectivity

Source: <https://www.digitaleurope.org/policies/how-to-spend-it-a-digital-investment-plan-for-europe/>

Single Market: Focus on Standardisation

STREAMLINED PROCESS

- Harmonized standards are key for conformity assessment
- Their publication must be accelerated and the bottleneck in legal review must be solved

GLOBAL ALIGNMENT

- More effort for global cooperation on standardization
- Industry driven consortia for new technologies (e.g. 5G ACIA)

REGULATORY COHERENCE

- No overlaps and inconsistencies among European legislation
- A set of cybersecurity requirements common to all vertical Directives
- No regulatory duplication/inconsistency between existing requirements and new AI regulation

Thank you for your attention

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