



10th **CLEPA**
AFTERMARKET
CONFERENCE
27-28 MARCH 2019

PROGRAMME

Overview of the Conference

Ability to lead in a digitalising environment

Networking Dinner March 27th

Times	Speakers	Presentation
18:00 - 19:30	Registration, cocktail	Exhibition
19:30 - 19:55	Sigrid de Vries , CLEPA Roberto Vavassori , CLEPA	Welcome address Opening speech
19:55 - 20:15	Andreas Cornet , McKinsey	A vision for the data economy in Europe
20:15 - 22:30	Networking Dinner	Exhibition

Conference March 28th

	Times	Speakers	Presentation
	08:00 - 09:00	Registration & breakfast	Exhibition
	09:00 - 09:15	Katrina Sichel , Moderator Frank Schlehuder , CLEPA	Conference opening
Market	09:15 - 09:45	Efrén Sánchez-Galindo , DG GROW	Regulatory framework in the EU on RMI and homologation
	09:45 - 10:15	Andreas Form , AT Kearney Christoffer Husted , AT Kearney	Monetising of car data in future business models
	10:15 - 10:45	Bill Dickman , 2hm	Relevance of eCommerce in the Aftermarket business
	10:45 - 11:15	Coffee break & Exhibition	
Competencies	11:15 - 11:35	Michael Van Impe Korn Ferry	"Brave new world" - The Digital Transformation, heaven or hell?
	11:35 - 12:30	Panel discussion Ralph Müller , Eclipse-Foundation Gaël Escribe , Nexus Automotive International John Quinn , LKQ Corporation Andrew Sexton , DRIV Benjamin Pieck , Matchingbox	Digitalisation - impact on people, organisation & corporate culture
	12:30 - 13:30	Lunch break & Exhibition	
Platforms	13:30 - 13:50	Alexander Haid , Caruso-Dataplace	The connected Aftermarket - Status & perspectives
	13:50 - 14:10	Michael Mezger , PROTEMA	Managing cores in a circular economy - A boosting business
	14:10 - 14:30	Aaron Solomon , Mobile Devices	An edge computing platform for vehicles and mobility services
	14:30 - 14:50	Benjamin Pieck , Matchingbox	Cultural recruiting - AI job matching platform focused on the cultural-fit
	14:50 - 15:00	Frank Schlehuder , CLEPA	Closing Remarks

Table of Contents

Conference exhibition	05
10 th CLEPA Aftermarket Conference	06
Automotive Aftermarket – An Outlook	07
CLEPA – The European Association of Automotive Suppliers	09
Moderator	10
Keynote speech	11
Market	12
Competencies	18
Platforms	24



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CONFERENCE Exhibition

As part of the 10th CLEPA Aftermarket Conference exhibition Schaeffler, Continental and Caruso dataplace have joined forces to give you a glimpse into the future of repair workshops in a connected world. Sharing vehicles' telematic data through a digital marketplace enables optimised logistics & repair processes, as well as higher consumer satisfaction & loyalty. Together they are presenting a case study articulated around 3 booths.

Continental will demonstrate its Remote Vehicle Data Platform allowing to connect passenger cars & light commercial vehicles through secure retrofit solutions. This technology is able to constantly monitor vehicle status and health. Possible breakdowns and error code messages can be sent to a repair workshop digitally.

Caruso will present its digital marketplace enabling data from connected cars to be easily shared among all players in a mobility ecosystem. Through Caruso, the telematic data collected by Continental, along with other data sources, can be easily made available to workshops in an open and standardised format. These live data can be also enriched with various other types of information, such as repair and maintenance documents from Schaeffler's REXPERT portal.

Schaeffler will show the REXPERT web-portal that supports workshops in the repair process, along with its new mixed-reality interactive tool for mechanics facing complex repair situations. After receiving an error code message from the connected car, the workshop is able through REXPERT to access repair instructions and identify the correct spare parts that need to be replaced on the vehicle. Finally, the mechanic is guided in the physical repair process on the car by the mixed-reality tool to perform the replacement of the defective parts.

10th CLEPA Aftermarket Conference

The CLEPA Aftermarket Conference is the leading Aftermarket conference in Europe and the place to meet for Automotive Suppliers. The conference offers a platform for the European Automotive industry to learn and exchange views and visions about challenges as well as latest legislative and technological developments with an impact on the future aftermarket business.

The CLEPA Aftermarket Conference, meanwhile in the 10th consecutive year, has increasingly been acknowledged as a pioneering event. It is as well a valuable platform for policymakers from the European Union and industry specialists to meet and understand from each other the future challenges of the automotive industry and the importance of the Aftermarket. It is also a great opportunity to meet the relevant players of the automotive industry and the aftermarket supply chain.

CLEPA is proud that the participation this year again includes a diverse group, with representatives of Europe's Automotive

Industry, the Institutions of the European Union and its Member States, as well as the specialised press.

We are confident that this conference will give you a deeper insight into the ability to lead in a digitalising environment and its consequences for the Automotive Aftermarket as well as some useful hints on how to successfully develop your Aftermarket business.

CLEPA cordially welcomes you to this event and looks forward to a rich and honest exchange of views and positions, resulting in inspiring discussions.

Sigrid de Vries

CLEPA Secretary General



Stephen Mc Millen

CLEPA Policy Manager



Roberto Vavassori

CLEPA President



Frank Schlehuder

Senior consultant Market Affairs

Automotive Aftermarket – An Outlook

Dear participants,

The impact of vehicle technology trends like electrification, connectivity and autonomous driving has reached the traditionally very stable Automotive Aftermarket. While automation is still a few years away from being relevant for our business, electrification and connectivity have started to reshape the Aftermarket from a repair and maintenance business to a service business over the lifetime of vehicles.

The latest CO₂ reduction targets of the European Commission for the years 2025 and 2030 have now paved the way for a substantial and timely increase in battery electric vehicles (BEV) and plugin hybrids (PHEV). Especially the strong growth of BEVs will lead to a stagnating or even declining market for traditional wear and tear parts in mature markets. In combination with the ongoing consolidation of the wholesale distribution and the initiatives of the vehicle manufacturers to either invest in the independent aftermarket or to increase significantly the share in the service market adds further cost pressure on suppliers.

On the other side, the connectivity of vehicles and the utilisation of vehicle-generated data will provide the opportunity for new service businesses. A fundamental prerequisite to participate in this new emerging mobility market is the fair, undistorted, unmonitored and competitive access to in-vehicle data, of course with the consumer's consent. The way how connectivity or

more specifically the communication from and to a vehicle is realised has a major impact on the competitiveness of market participants and the speed of development and implementation of innovative mobility services.

Driven by the mandatory eCall regulation connectivity in new vehicles became standard. For the entire data transfer from and to vehicles only solutions routing all data traffic via proprietary back end servers are supported by vehicle manufacturers. Although there is a general willingness to make data available for third parties the role of the vehicle manufacturer as a gatekeeper and a potential competitor is seen very critical by many stakeholders. In the interest of maintaining a level playing field while utilising the innovation power of many creative players for new mobility services, a timely solution for fair access to in-vehicle data is crucial.

With the new type approval published in 2018, legislators at the EU level have strengthened the independent aftermarket by granting access to electronically processable vehicle equipment information and securing the on-board-diagnostics functionality. The revision of the motor vehicle bloc exemption regulation (MVBBER) beyond 2023 and the revision of the repair clause, the European Commission has opened the discussion about the future of the independent aftermarket. To secure consumer's choice for vehicle maintenance it will not be enough to



grant the right to suppliers to put their logo on their products and to be free to sell the parts without restriction. It will be also necessary to ensure that automotive spare parts can be replaced or fitted by all market players even if additional tools, software or authorisation are technically required.

While access to in-vehicle data is a prerequisite to enter the mobility service market our industry in parallel has to develop the necessary environment to attract the right people. Questions about the right corporate culture, mindset and adequate leadership models have to be answered. We hope this conference can provide you with an outlook on possible market developments and can give you further inspirations on the necessary next steps to take.



Yours Sincerely,
Frank Schlehuber

CLEPA - the European Association of Automotive Suppliers

WHAT IS CLEPA?

CLEPA - the European Association of Automotive Suppliers - **brings together over 120 global suppliers** of car parts, systems and modules and **more than 20 national trade associations and European sector associations**.

WHAT DOES CLEPA DO?

CLEPA is the **voice of the EU automotive supplier industry** linking the sector to policy makers.



“**Our Vision** is for the European Automotive Supply Industry to be the **leading provider** of highly efficient & sustainable **mobility** worldwide”



“**Our Mission** is to increase the **competitiveness** of the European Automotive Supply Industry and drive its sustainable **growth** while enhancing **wealth** and **employment**”

- CLEPA **supports the EU and UN** in their decision making and shapes the legislation impacting the automotive business
- CLEPA is a **credible partner** to the EU institutions and UN authorities
- CLEPA **actively endorses the development of competitive framework conditions**
- CLEPA **ensures the consistent development** of international trade and technical harmonisation
- CLEPA **promotes innovation** and **ensures EU funding for Research and Innovation**
- CLEPA fully **complies with EU competition law and antitrust rules**

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MODERATOR

Conference opening



Katrina Sichel

Moderator

Wit and Word Communications

Katrina is a London-born, Brussels-based moderator with a degree in Modern Languages from Oxford University. A former **TV producer**, she put together news packages for the BBC, Sky News, Channel 4, AP and Reuters, interviewing well-known figures from the arts, fashion and political arenas. Since 2007, Katrina has been **moderating events** large and small covering diverse topics and policy areas, from R&I, social affairs, finance and digitisation, to agriculture, environment, energy, fisheries and health.

Alongside, until 2017, she managed the development and roll-out across Europe of multimedia, multi-lingual **communications campaigns** targeting the public, and EU and national stakeholders from diverse sectors. Katrina speaks fluent French, rusty Russian and a dash of German.

KEYNOTE SPEECH

A vision for the data economy in Europe

Dr. Andreas Cornet

Senior Partner

McKinsey

Andreas joined McKinsey more than two decades ago and is focusing his consulting work on the automotive and automotive supplier industry.

Today, he leads the global consultancy's work with auto suppliers and the automotive and advanced industries sector in Germany.

His most recent work is focusing on topics around digital transformation and advanced analytics, both at OEMs and suppliers. He is helping many of his clients to cope with disruptions around the four most important trends: Autonomous Driving, Connectivity, Electrification and Shared Mobility.

Andreas has been cooperating with CLEPA since 2012 in the course of several joint studies.

Before joining McKinsey, Andreas—a native German speaker, who's also proficient in Dutch, English and French—co-founded a software consultancy where he worked until joining McKinsey in 1994.

He studied Mechanical Engineering, earning a MS degree from Technical University of Aachen and a PhD degree from Otto Beisheim School of Management.



MARKET

Regulatory framework in the EU on RMI and homologation

09:15



Efrén Sánchez Galindo

Legislative Officer, DG GROW

European Commission

09:45

Born in Madrid (ES) in 1971. Graduated as an engineer from the Polytechnics University of Madrid. Since 2000, civil servant in several Spanish Ministries, such as Industry, Research, Defence and Justice. As from 2012 engaged in the Automotive and Mobility Industry Unit in the European Commission (DG GROW). Policy officer for motorcycles, tractors, engines for non-road mobile machinery, access to in-vehicle data in general, and in particular access to vehicle on-board diagnostics information and vehicle repair and maintenance information.

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MARKET

09:45

10:15



Monetising of car data in future business models

Andreas Form

Partner

AT Kearney

Andreas Form is a partner with A.T. Kearney in Europe and a member of the Automotive Practice. He has extensive experience with automotive clients on both sides – in OEM leadership positions and as management consultant. His work record ranges from strategy over operations to implementation. Andreas is servicing an international client basis, covering Europe, North America and Asia.

Andreas is a sought-after expert for automotive sales, marketing and aftersales topics with a focus on innovative sales models, business model innovation and new mobility concepts. He is considered to be one of the most recognized experts for the digital transformation in the automotive industry.

Prior to joining A.T. Kearney, Andreas spent 13 years at BMW in various leadership roles. He holds a master's degree in business administration and mechanical engineering from the Technical University Darmstadt and participated in executive programs at Harvard Business School and IMD Lausanne.

Christoffer Husted

Managing Director

A.T. Kearney Denmark

Christoffer Husted Rasmussen is the Managing Director of A.T. Kearney Denmark, and leads the Automotive, Industrial, and Transportation Practice in the Nordics.

His main work is in the areas of M&A, Strategy, and Commercial Excellence.

Within automotive, Christoffer has served a range of OEMs globally – e.g., on product launch and dealer optimization; he has worked with aftermarket suppliers – e.g., on strategy. And he has supported multiple private equity M&A deals in the supplier space.

Before joining A.T. Kearney, Christoffer worked with another global consulting firm and was head of strategy and M&A in the medical device industry. His educational background is a M.Sc. in Business from Copenhagen Business School, New York University, and ESB Reutlingen.



09:45

10:15

MARKET

10:15



10:45

Relevance of eCommerce in the Aftermarket business

William (Bill) Dickman

Head of International Business and Senior Executive Consultant

2hm

William (Bill) Dickman is Head of International Business and Senior Executive Consultant at 2HMforum; a renowned management consultancy and market research firm based in Mainz, Germany. He has earned the trust of many automotive partners, such as Hella, Mercedes-Benz, Porsche, VREI, ZF TRW, TMD Friction, IMS:Gear, throughout his 25+ years of professional experience in business development, new business models, marketing and market analysis in Europe, USA, Asia and Africa.

At 2HMforum, he has led numerous research and consulting projects in the automotive industry for customers ranging from aftermarket manufacturers, to OEMs, to subcontractors and associations. Prior to his tenure at 2HMforum he held many senior positions at Motorola; including Director of Marketing and Sales at Motorola's Automotive Communications business.

Quote: *'Increase the quality of your customer relationships.' Sounds easy. Doing it properly though separates the successful from the others"*

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CoremanNet's worldwide network for your core management



CoremanNet is managed by Circular Economy Solutions GmbH, the expert in Managing Circular Economy Networks.

COMPETENCIES

11:15

11:35



“Brave new world” – The Digital Transformation, heaven or hell?

Michael Van Impe

Senior Client Partner

Korn Ferry

He has been successful in developing leaders and leadership teams across a wide array of industries and cultures. His coaching conversation often begins with the question, “Where do you want to go from here?”

Mr. Van Impe’s coaching specialties include strategic alignment, change readiness, organizational transformation, leadership team alignment, and strategy implementation.

The COO of a global retail business needed to make drastic changes in the business model of several country operations. Mr. Van Impe advised this executive to provide support to the executive teams of these countries. He first aligned the executive team around a comprehensive strategy implementation initiative and then provided executive coaching and team development.

The Chief HRO of an oil and gas company was confronted with strong resistance from executives to new corporate policies. Mr. Van Impe mapped the different causes for resistance and then worked with individual executives to move forward and implement global policies.

Mr. Van Impe holds an MSc in operational management and information technology from KU Leuven, Campus Antwerp, Belgium and an executive master’s degree in organizational psychology from Columbia University, New York. His accreditations include the CPI 260, MBTI, FIRO-B, Hogan suite, and 4 MAT instructional design methodology. He coaches in English and Dutch and has a working knowledge of French and German.

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COMPETENCIES

Panel discussion

11:35



Ralph Müller

Title/Function

Eclipse-Foundation

12:30



Gaël Escribe

Title/Function

Nexus Automotive International



John S. Quinn

Chief Executive Officer and Managing Director

LKQ Europe

COMPETENCIES

Panel discussion

Andrew Sexton

Group Vice President and General Manager
Europe, Middle East & Africa (EMEA)
Motorparts Division, DRiV Incorporated

Benjamin Pieck

Title/Function
Matchingbox



11:35



12:30

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Added value through serialization

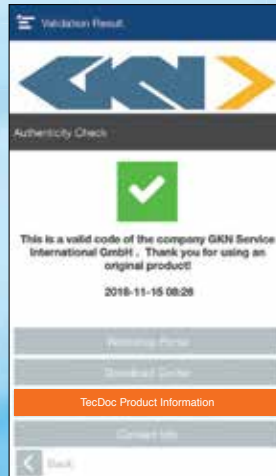
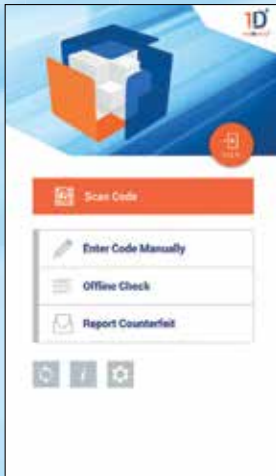


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PLATFORMS

The connected Aftermarket – Status & perspectives

13:30



Alexander Haid

Managing Director
Caruso GmbH

13:50

Alexander Haid (50), has been one of the two managing directors of Caruso GmbH since its foundation in March 2017. His areas of responsibility include partner management, cooperation, human resources, technology, communication/PR and legal. Previously, he had been in charge of the Caruso project at TecAlliance since 2015 in his function as Head of Corporate Strategy & Projects.

Prior to joining TecAlliance, he worked as a consultant primarily in the areas of corporate strategy/development, M&A, sales and customer service as well as price and conditions management for companies in the automotive and engineering industries.

From 2011 to 2014, Alexander Haid served as Vice President Global After Sales at Magna International. From Canada and China, he developed and implemented worldwide after-sales strategies, associated corporate structures, manufacturing concepts and business models for the most profitable OES and IAM business.

In 1993 he joined Bosch Automotive Aftermarket for a total of 16 years. Most recently, as Vice President Europe West & South, he was responsible for the region's return on sales. He was in charge of parts business, workshop equipment, training, customer service and workshop concepts for the Bosch workshop chain. Prior to this position, Alexander Haid worked for the company from Singapore for seven years as General Manager South East Asia and Director Product Marketing for Asia Pacific.

He began his professional career at Bosch in 1993 in technical customer service.

In 1993 Alexander Haid completed his mechanical engineering studies at the University of Kaiserslautern as a graduate engineer in the field of mechanical engineering with a focus on production.

PARTNER CONNECT

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Get key insights on how our partner network utilises Caruso to monetise their assets, fuel their service portfolio & expand their customer base in the connected world.

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TAKE OFF

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PLATFORMS

Managing cores in a circular economy – A boosting business

13:50



14:10

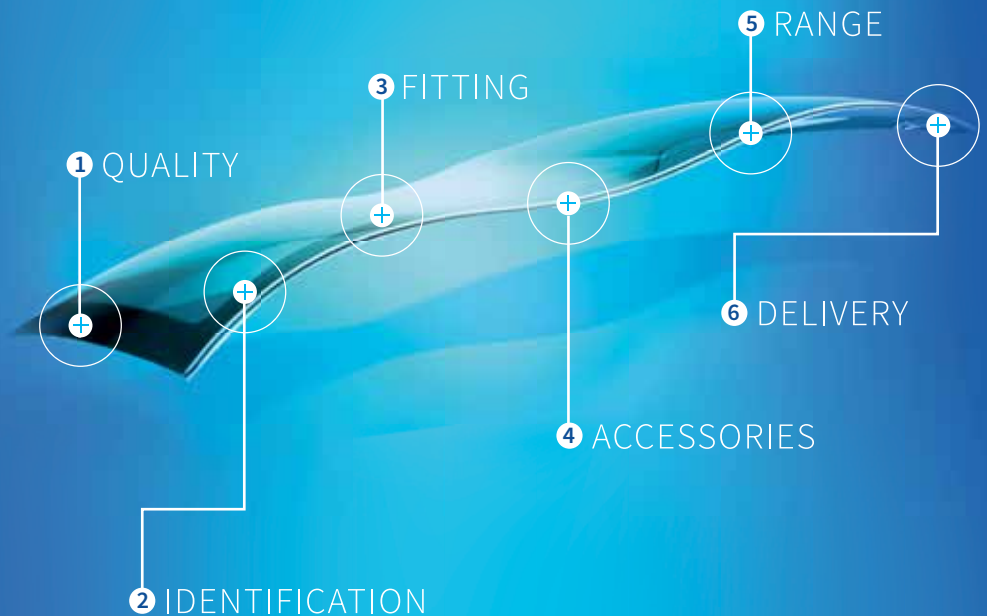
Michael Mezger

Owner - Managing Director and Partner
PROTEMA Unternehmensberatung

Michael Mezger studied mechanical engineering at the University of Stuttgart with focus on Industrial Design and Factory Engineering. After 7 years as an applied researcher and consultant in production and supply chain optimization at Fraunhofer-Institute in Stuttgart and Magdeburg, he joined Bosch Automotive Aftermarket as a project manager for organizational development of the division. Since 1999 Michael Mezger is one of four managing director and partner at PROTEMA in Stuttgart. With over 25 years of professional experience, he has accompanied numerous national and international projects in various industries as a project manager, consultant and facilitator. Michael's main expertise are strategy management, business model innovation, process management, value stream optimization, and organizational development with special focus on the automotive aftermarket. Michael Mezger has profound experience in designing best fitting organization models for global market players, SMEs and large companies at corporate, division, and regional level.

Michael's motivation is to combine high level expertise and a relaxed atmosphere in the consulting projects with his clients.

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PLATFORMS

An edge computing platform for vehicles and mobility services

14:10



Aaron Solomon

CEO and founder

Mobile Devices

Aaron Solomon is the CEO and founder of Mobile Devices, a French company established in 2002 focused on the development of a Connected Car Platform that includes an Edge Computing and Data Management Platform (Munic.io), embedded devices (dongles and hardwired devices) and a large ecosystem of service providers.

Prior to that he was GM at B2i Automotive, a french engineering company since 1999.

He holds a Master of Engineering of the Ecole Superieure de Physique et Chimie de Paris.

14:30

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PLATFORMS

14:30

14:50



Cultural recruiting –AI job matching platform focused on the cultural-fit

Benjamin Pieck

Founder

Matchingbox

Founder @matchingbox, award-winning HR entrepreneur, personality coach. These are probably the keywords that best describe Benjamin Pieck. After graduating psychology school at the University of Frankfurt, Benjamin Pieck first moved to Cairo, where he set up an international innovation network together with other international experts. In addition to his activities as a lecturer and coach for various universities and companies, he has been a successful speaker at major events such as the CeBit or the Frankfurt Book Fair for several years. Among other projects, Benjamin Pieck was involved in developing a matching algorithm for a well-known German dating platform. He now manages the HR-Tech startup matching box, which won the prestigious HR Excellence Award in 2017.

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CLEPA next events

—

Materials Regulations event

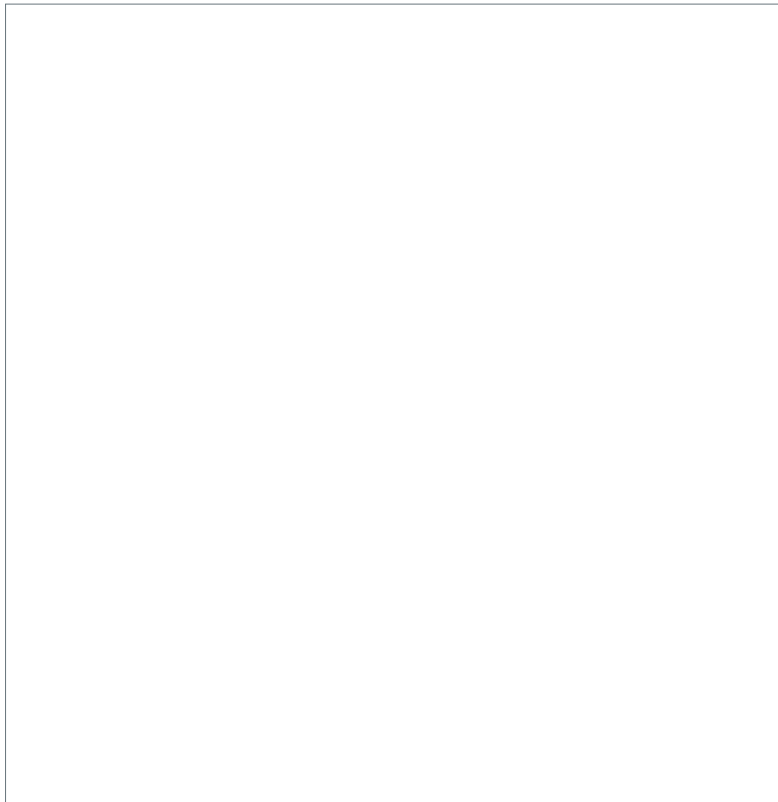
21st and 22nd May, Stuttgart

Innovation Awards

13th June, Brussels

Topic ideas for the 11th CLEPA aftermarket conference:

Thank you for your participation in the 10th CLEPA Aftermarket Conference. In order to continually improve the conference and provide you with beneficial experiences, we ask that you complete this evaluation form. This information is very important to us and we would appreciate your response.



Please leave this page on the registration desk or email your ideas to Stephen Mc Millen s.mcmillen@clepa.be

Thank you

Feedback

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Conference Overall	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. What part of the conference was most valuable to you?

3. Did the conference cover material that will be useful in your work?

- Yes
- No

4. Why?

5. Additional comments?



CLEPA was **founded in 1959** in Geneva. The initial reason behind the foundation of CLEPA was the establishment of the United Nations Economic Commission for Europe (UNECE) 1958 Agreement which focuses on technical harmonisation in the automotive sector. CLEPA has ever since acted as the suppliers' global representative in UNECE.

The creation of the association was **essential** in order to bring forward the benefits of an industry that currently accounts for **almost 4% of the European Union's GDP** and covers **12 million sector-related jobs**.

In 2019, CLEPA celebrates its 60th anniversary representing **over 120 of the world's most prominent suppliers for car parts, systems and modules** and **23 National trade associations and European sector associations**.

CLEPA 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 overall nearly five million people across the continent.

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