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CEAGA Galician Automotive Cluster

ciac Clúster de la Indústria d'Automoció de Catalunya



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PRESS RELEASE

Nine European automotive clusters join to promote cooperative projects and share good practices



- It is created the European Automotive Cluster Network (EACN).
- EACN represents a total of nearly 1.400 companies and research institutes (>50% SMEs) employing more than 300.000 people.
- The main objective is to share knowledge in the areas of product, production, process, people (4Ps).

The Cluster Organizations Automotive-bw (Germany), Bayern Innovativ (Germany), the Clúster de la Indústria d'Automoció de Catalunya (Spain), Galician Automotive Cluster (Spain), European Automotive Strategy Network (The Netherlands), Automotive Cluster Bulgaria (Bulgaria), Pôle Véhicule du Futur (France), the Automobile Cluster Serbia (Serbia) and the Silesia Automotive & Advanced Manufacturing (Poland) have joined the European Automotive Cluster Network (EACN), with the following objectives:

- Apply for the ESCP Smart Specialisation Label after publication of the call by the European Commission (foreseen in 2017).
- Generate and/or increase confidence between the partners and their members by:
 - The organisation of cross-cluster actions such as e.g. B2B and C2C (Cluster-to-cluster) matchmaking events.
 - Common stands on expositions.
 - Invitation of the partners and their members to local events held by one partner
- Create new knowledge by common projects by:
 - Cross-cluster creativity workshops.
 - Common innovation and cooperation projects.
 - Benchmark of best practices and success stories of the partners and their members.
- Share and mutualise the financial risk of new tools
 - Joint development of products, solutions, processes between cluster members.
- Generate new businesses.
- And other actions which could be decided by partners at any time.

The partners decide to focus the partnership activities in the field of Industry 4.0 – Factory of the Future – Industrial modernisation with the following four strategic domains:

- Product: new materials, new vehicle concepts, etc.
- Production: additive manufacturing, supply chain optimization, etc.
- Process: digitalisation, new and innovative production tools, etc.

- People: working environment, training/education, skills 4.0 and re-talenting to meet the skills gap, etc.

These clusters represent a total number of more than 1.400 member companies and research institutes, of which more than half are SMEs. EACN cluster members employ more than 300.000 people.

Context:

The European automotive sector faces big challenges due to upcoming trends such as electric or shared mobility or autonomous and connected cars. In addition, new competitors such as e.g. Tesla, Google, Uber or Apple are entering to the market with new products and services. To hold or increase competitiveness, the European Automotive Industry needs to be innovative with regard to the products, the production, the processes and the people. Industrial modernisation, industry of the future, or Industry 4.0 are the main key issues allowing producing well adapted, cost-effective, and sustainable vehicles, and enabling Europe to stay a world-wide leader in this domain.

Clusters are defined as « geographic concentrations of industries and associated institutions related by knowledge, skills, inputs, demand, and/or other linkages”¹. They are a leverage factor to strengthen competitiveness of their members. Therefore, the European Commission fosters cluster creations as well as inter-cluster collaborations. In May 2016, the European Commission published a Call for the Expression of Interest “Towards European Strategic Cluster Partnerships (ESCP) for smart specialisation investments” in the field of industrial modernisation². The attribution of a European label for selected European Strategic Cluster Partnerships is foreseen. By this, the European Commission aims at supporting clusters and cluster members to cooperate across borders and across sectors, to innovate together for better competitiveness, and finally to stimulate common businesses and common investments and thereby economic growth.

All partners are clusters focussing on the automotive sector, with OEMs, SMEs as well as academic and institutional members. This partnership will help strengthen cooperation between the clusters and their members.

About the clusters:

- **Automotive-bw**

automotive-bw bundles the competences of the vehicle industry throughout the whole of Baden-Württemberg and in particular intends to support small and medium-sized component suppliers in managing the structural transformation and in developing business models which are fit for the future.

The nationwide network was founded in 2010 at the initiative of the Ministry for Economic Affairs in Baden-Württemberg with funds of the European Fund for Regional Development (EFRE). Well-known players cooperate on this platform: Vehicle manufacturers and automotive component suppliers, service providers, University institutes, research institutions and associations. The aim is to systematically press ahead with the networking of the automotive industry in the country and to promote development co-operations. To the extent that OEMs and system suppliers form a network and cooperate worldwide, particularly small and medium-sized component suppliers should also be encouraged to bundle their forces by means of co-operations. Today *automotive-bw* represents direct 70

¹ Delgado, Mercedes; Porter, Michael; Stern, Scott (2014): Defining Clusters of Related Industries. Cambridge, MA: National Bureau of Economic Research

² EC European Commission (2016): Towards European Strategic Cluster Partnerships for smart specialisation investments. Call for Expression of Interest. DG GROWTHG, www.clustercollaboration.eu/sites/default/files/news_attachment/call_for_the_expression_of_interest_escp_s3_may2016_final.pdf, [19/05//2016]

automotive companies (40% SMEs) with 70.800 direct workers and addresses more than 2.000 companies in the Autoland Baden-Württemberg.

The cooperation of the network partners, mostly regional business development agencies or initiatives of the Chambers of Commerce in the country, is coordinated by the RKW Baden-Württemberg – it is the central funding organization and office of *automotive-bw* and additionally also organizes nationwide offers and events such as the annual "component supplier conference automobile". A close cooperation exists with the State Agencies e-mobil BW and Leichtbau BW. *automotive-bw* holds the quality label "Cluster Excellence Baden-Württemberg" since February 2015. www.automotive-bw.de

- **Bayern Innovativ**

Bayern Innovativ GmbH is Bavaria's organisation for innovation, technology and knowledge transfer. It supports players from industry and science in all stages of the value chain by providing customised services to boost innovation dynamics. Bayern Innovativ operates at the interfaces of various industries and technologies. The goal is to build an ecosystem of dynamic networks to accelerate the innovation process. In addition to the organisation's own clusters Energy Technology, Automotive and New Materials, activities focus on "cross-clustering" with other Bavarian clusters and networking with key players in the Bavarian innovation landscape.

www.bayern-innovativ.de/

- **European Automotive Strategy Network**

In 2008 EASN has been established as a platform for European automotive regions and clusters as well as their companies, institutes and authorities. Via its clusters and other partners, EASN promotes in-depth knowledge of the regional situations, access to the Automotive industry, institutes and universities in the respective regions, close contacts to SME companies in these regions and access to local, national and EU governments.

www.easn.eu/

- **CEAGA (Galician Automotive Cluster)**

The Galician Automotive Cluster (CEAGA) brings together the entire automotive sector in Galicia, region in the northwest of Spain which holds an important position in the field of manufacturing cars and components at European level. The mission of CEAGA is to develop cooperative projects to foster competitiveness. More than twenty years after its creation, CEAGA has become a solid structure, allowing the sector to develop initiatives of great strategic value and to introduce new companies into the Galician economy. Since it was first established, the number of members has grown by more than 100%: from an initial figure of 37 companies to the 113 companies (including the PSA Group Center of Vigo and the Galician Automotive Technological Centre) which currently take part of CEAGA. CEAGA represents 113 automotive companies (60% SMEs), 19.850 direct workers and 8.320 Million Euros turnover. The Galician Automotive Cluster holds the Gold Label certification awarded by the European Secretary for Clusters Analysis (ESCA), since 2013. CEAGA was the first automotive cluster in to obtain this award. Website: www.ceaga.com

- **Automotive Cluster Bulgaria**

Founded in July 2012, ACB is a non-profit organization that represents the interests of car manufacturers, suppliers and providers of services for the automotive industry in Bulgaria. It promotes synergies between cluster members and strives to maintain business growth and competitiveness through participation in international collaborative projects, case studies and professional automotive training programs. ACB is an active partner of the international automotive network. Its "backbone" are leading international OEM and Tier 1 suppliers.

Currently, 37 are the registered members of ACB and more than 20 companies are in negotiations procedures for a membership. Our members are national and international companies representing over 20,000 employees in Bulgaria and more than 650,000 people worldwide. These are companies produce upholstery, seats, cables, plastics components, parts for air conditioning and engine microchips, sensors, rubber seals, glass, spring, electronics, filters, aluminium profiles, lighting systems, belts, etc. not just for the middle class cars, but also for the luxury segment. The only OEM member so far is Litex Motors which is the official partner of Great Wall Motors. It assembles vehicles of the Chinese manufacturer at the jointly-developed facility located in Lovech, Bulgaria.

ACB's main activities are related to development and management of projects under various EU programs; services for members – trainings, seminars, round tables, suppliers days, etc.; networking with automotive clusters across Europe; initiatives for national legislative changes in favour of the industry; cooperation in developing research and new products and services with high added value. automotive.bg/

- **Pôle Véhicule du Futur**

Pôle Véhicule du Futur (PVF) is one of the leading automotive clusters in Europe, located in the Eastern part of France. The cluster is federating industrials and research institutes in the field of future vehicles and mobility. The overall objective is to create solutions for tomorrow's vehicles and mobility by initiating collaborative research projects to develop near-market innovative products or services and by improving the industrial performance of companies via e.g. lean manufacturing or industry 4.0.

PVF totals 375 members having been partner in 164 funded projects, including 27 European projects for a total amount of EUR 563 million. PVF obtained the European Gold Label Excellence award, gained a comprehensive experience in European research and cooperation programmes by its participation in eight EU R&D projects, and has relationships to a multitude of clusters in France and around Europe. PVF's target markets & strategic business areas are Composites and new materials, Recycling, Automotive components, Battery/fuel cell electric vehicles and powertrains, Recharging infrastructures, ITS and Mobility services.

www.vehiculedufutur.com/en

- **Silesia Automotive & Advanced Manufacturing**

The cluster Silesia Automotive & Advanced Manufacturing was established in 2011 and covers three regions in the Southern part of Poland: Śląskie, Małopolskie and Opolskie. More than 1089 companies are active in the automotive sector in this area, of which 57 are official cluster members. Several other companies – most of them situated on the premises of the Katowice Special Economic Zone – participate in the cluster activities on a case by case base. Among the cluster members, there are 8 research organisations and universities and 3 business support organisations. Continuous process and production improvement, employee productivity and motivation, new technology competences and local supplier networks are key success factors. The importance of agile and flexible production technologies is the fundament for the cluster's activities in the area of advanced manufacturing. The cluster organizes workshops, meetings, benchmarking analyses, brokerage events and development projects. silesia-automotive.pl/en

- **Clúster de la Indústria d'Automoció de Catalunya**

The Automotive Industry Cluster of Catalonia (CIAC) is a non-profit association open to companies operating in the automotive industry, that are based in Catalonia, and pursue R&D+I activities. CIAC works to boost the competitiveness of the automotive industry, as the driving force behind the Catalan economy, through the implementation of successful projects. CIAC has helped developing many projects in relation with Industry 4.0 and automated, electric and shared mobility, causing a real impact on the sector at a national

level. CIAC also has its own Project Management Platform and has actively promoted the creation of the Automotive Professional Training Centre (CFPA) in Martorell, to which board of directors the Cluster takes part in.

Although it is a quite young cluster, as it was created at the beginning of 2013, it has grown quickly and it is now one of the main clusters in Spain, with 185 partners (74% SMEs), +80% of which are industrial manufacturers, as well as the only Cluster with 2 OEM's in the country, Seat and Nissan. CIAC represents an approximate number of 44.200 direct workers and 19.100 Million Euros of turnover. www.ciac.cat/en

- **Automobile Cluster Serbia**

Serbian Automotive Cluster - AC Serbia network includes Serbian companies and institutions that are producing automotive parts and components, respectively providing services in the automotive sector. AC Serbia operates on the whole country.

Missions: Connecting business and networking of scientific, development and public institutions which will help creating synergies and launching joint development projects, reaching the level of quality and creating a recognizable brand. This will also contribute to international competitiveness strengthening of our members.

Vision: AC Serbia is acting as the central network of automotive parts and components manufacturers in Serbia, who have become part of international supplier chains.

www.acserbia.org.rs/en/