

SWOT Analyses of S-LIFE regions

Complementarity of strengths and similarity of weaknesses

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S Strong presence of the value chain in all regions, but with different characteristics and orientation

S Sustainable production and resource efficiency regarded as key innovation areas

S E-mobility and new materials are regarded as a growth area

W Regional car sales under pressure in all regions

W Strong cooperation between research institutes and automotive sectors

W End of Life chain under increased pressure of high exports of vehicles and ELVs

ifferences

S Availability of influential OEMs and large suppliers differs between regions

S Availability of S_LIFE related funding instruments varies strongly from region to region

W Organisational and infrastructural performances strongly developed in the Netherlands - not in other regions

W Variation in performance on crossborder research projects

W Access and influence towards decision-makers show strong difference

W Performance of the end-of-life chain shows strong diversification

All five automotive clusters cooperating under S_LIFE are covering the whole value chain. This confirms their positioning to the major automotive regions in Europe. In the scope of S_LIFE, most important complementarities are the power of End-of-Life research and organisation in the Netherlands, and the leading edge production in South Germany (Bavaria and Baden-Württemberg) and Alsace / Franche-Comté in combination with advanced research for new materials in Alsace / Franche-Comté, Bavaria and Baden-Württemberg.

General Opportunities and Threats

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- **O** Growing awareness on ecological end-of-life structures
- **O** Industrial innovation and research strengths are capable to improve life cycle performance
- **O** Strong motivation to cooperate on a European scale
- **O** Overall resource efficiency along the value chain receives higher attendance
- **T** Competition from emerging markets is affecting industrial performance along the value chain

Differences

- **O** Variation in advanced raw material material industries
- **O** Strong variation in funding instruments and availabilities for research and innovation
- **T** Variation in organisational performance of the end-of-life chain
- **T** Strong difference in the political will to improve recycling sector and processes

Resource / material efficiency is becoming a priority in regional activities. Added value could rise from European networking in order to moderate regional efforts and to close material loops. Furthermore, material flows need to be organised across different sectors if cost efficiency should be maximised.



A major threat in all regions is the unstable flow of recyclates, both in quality and quantity which contradicts the requirements of up-to-date automotive production (just in time / just in sequence) with its high quality standards.

As vehicles normally have a life span of 12 to 15 years (or even above) prediction of demand for recyclates from EoL vehicles is rather difficult, as at least five new model generations have entered the market during this period.

All clusters are facing the threat to develop joint activities which do not result in additional regulations on European and national level, causing higher production and service costs and thus reducing global competitiveness of European OEMs.

Aspirations and results preparing the basis for the S LIFE Vision Document

shared

A Improve the economic performance of SME's along the value chain

A Improvement of the supply chain, to increase use of second hand parts

A Better cooperation between sectors and regions considered as key to mprove material efficiency

R Fulfillment of legal demands, especially the ELV Directive

R Better overview of regional, national and European Best Practices

R Improved tracing and tracking of materials, vehicles and ELV's

fferences

A Improvement of automotive production not seen as national challenge but focus on added value (NL)

A Improvement of environmental performance of recycling industries is diversified between regions

It is an evidence that all regional cluster organisations will work on supporting their partners in the transition towards the 95% (recycling and revalorisation) ELV target for 2015.

All partners agree in the general aspiration to reduce the dependency on foreign raw materials. In order toachieve this, the primarily identified route will be to increase/improve:

- Material efficiency in production, giving the European automotive industry a competitive advantage on global markets
- the re-used/re-manufactured parts market to reinforce its supply loop



