

# Initiatives to facilitate the transition to the new mobility

## CATALONIA

Barcelona, 10<sup>th</sup> March 2024

- The OPTIMA Office
- Catalan ecosystem of the new Mobility
- “Social Dialogue” Action in Transition Pathways

# Introduction



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## The OPTIMA Office

- **OPTIMA Office** – Office for the Transformation of the Mobility and Automotive Industries
- **Responsible unit:** DG Industry in the Business and Labor Department
- **Government business unit:** A one stop-shop to establish a permanent strategic dialogue with the industrial sector



- **To collaborate** with public entities and other government units with jurisdiction in mobility
- **To anticipate** the sector challenges
- **To support** businesses
- To have **representation** in forums, platforms, think tanks and other initiatives at European and International participation

# Team



**Tomàs Megía**

Manager of the Public Office for the Transformation of the  
Mobility and Automotive sector



**Manel Clavijo**

Knowledge and Sector  
Dialogues Area



**Mireia Llovet**

Business  
Transformation  
Support Area



**Riánsares López**

EU Programs  
Engagement Area



**Karim Hassan**

ACCIÓ's  
Brussels Office



**Genis Fibla**

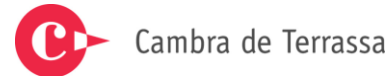
Internship  
Trainee

# Our Network





# Enterprise Europe Network



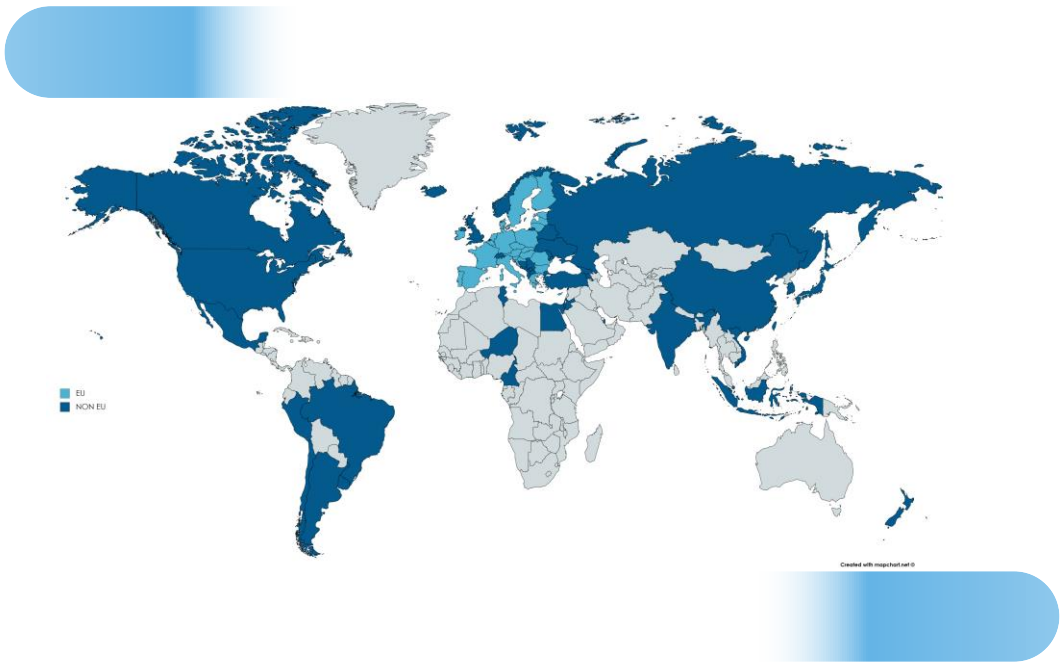
Fem avui l'**empresa** del demà



# Enterprise Europe Network (EEN)

**+470**  
Organisations

**69**  
Countries, present in all regions of the EU



Internacionalització



Innovació



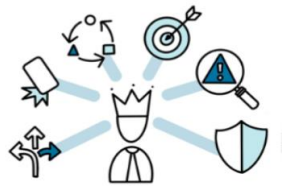
Accés a finançament



Sostenibilitat



Digitalització



Resiliència



# Mobility, Automotive and Transport Sector Group (MAT SG)



**Riánsares López**  
Chair of the ATM SG



**Wolfgang Treinen**  
Co-chair of the ATM SG







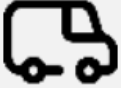







# The automotive sector in Catalonia

Key data for the automotive sector in Catalonia



## The mobility sector, segmentation of the sector

Rail	Automotive	Motorcycle	Micromobility	Others
 <p>Passenger transport (long distance, medium distance, suburban, metro, section and light trains))</p>	 <p>Passenger cars</p>	 <p>Motorcycles</p>	 <p>Bicycles, tricycles and Electric motorbikes</p>	 <p>Bus</p>
 <p>Transport of goods</p>	 <p>Light commercial vehicles (derived from tourism, pick-ups and vans)</p>	 <p>Moped</p>	 <p>PMV Personal Mobility Vehicles</p>	 <p>Maritime transport</p>
	 <p>Industrial Vehicles (light, heavy industrial and tractor trucks)</p>	<p>Other light vehicles (tricycles, quadricycles)</p>	<p>(scooters, skateboards, skates, segways, hoverboards, solowheels, light vehicles for reduced mobility, etc.)</p>	 <p>Air transport</p>

Mobility services

# The automotive sector in Spain

## Spanish OEMs



- 2nd European car manufacturing country after Germany and 8th worldwide (2022).
- 1,883,308 vehicles produced in Spain (2022).
  - 320,654 vehicles produced in Catalonia (2022). Third autonomous region in number of units produced in 2022, after Galicia and Aragon.



Major brands in Spain	Units produced in 2022
PSA	764,517
Volkswagen	623,720
<b>Martorell</b>	<b>320,654</b>
Renault	220,077
Ford	146,263
Mercedes-Benz	104,024

Source: MarkLines 2022, Sernauto

**CataloniaConnects**

# Key data for the automotive sector in Catalonia

## 365 companies



- The number of companies is growing by 1.7% compared to 2021, one point more than in Spain.
- These account for **22.1%** of the total number of companies in the sector in Spain.
- **74.0%** of companies are located in the Barcelona area.
- **90.8%** are small or medium-sized companies.
- **18.3%** are branches of foreign companies.
- **55.6%** are exporters and **44.4%** are regular exporters.

## Production



- **320,654** vehicles produced in Catalonia (2022), 17% of Spanish production. Third autonomous region in number of units produced in 2022.

## Turnover: €14,730 M



- **3rd largest industrial sector by turnover in Catalonia**, after food and chemicals (**11.3%** of Catalan industrial turnover).
- The turnover of major companies (**9.2%** of all companies) accounts for **89.1%** of the sector's total turnover.
- The sector's turnover accounts for 6.5% of Catalonia's GDP.

## 36,655 people employed



- **7.6%** of workers in Catalan industry and **23.8%** of workers in the automotive sector in Spain.
- **99.9%** work in companies older than 10 years.
- **72.1%** work in large companies (over 250 employees).

Vehicle manufacturing + sales and repair industry

10,353 companies

1.6% of Catalan companies  
14.3% of Spanish companies



*Source: ACCIÓ, based on turnover and employee data from the INE – structural business statistics: industrial sector (2020), data on the number of companies from the INE – DIRCE, Central Business Directory (2022) and data on units produced from MarkLines 2022*

# VW - SEAT Technical Center

## Key figures

Surface area: 200,000 m<sup>2</sup>

Built-up area: 43,000 m<sup>2</sup>

Workforce: 919 employees

Workstations with CAX technology: 848



The SEAT Technical Centre focuses on R&D and is the only centre of its kind in Spain with the experience and technology required to fully develop new vehicles.

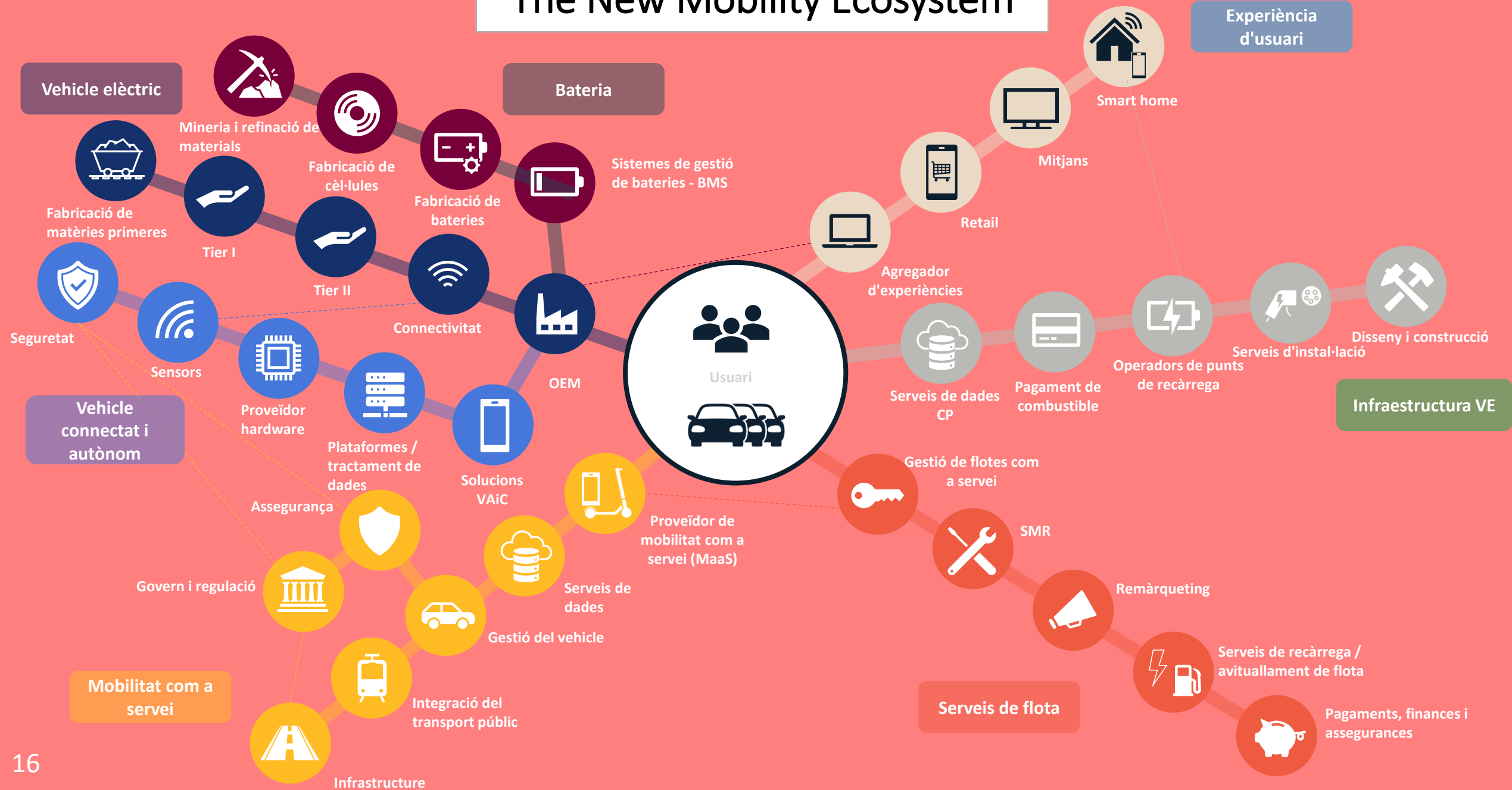
The **use of simulation and virtual reality technologies** has enabled the Technical Centre to fulfil important requirements such as shortening development periods, thus providing a benchmark in the consortium, as well as reducing costs and increasing quality.

**Design is one of the strong points** of the “new SEAT” cars, with the company’s designers drawing up a sketch which, in line with the company’s strategic areas, sets a standard and responds to customer requirements.

Development phase begins for areas such as bodywork, finishes, engines, chassis, electricity and electronics, active and passive safety features, environmental protection, comfort and ergonomics, multimedia applications etc.

Prototypes testing in depth. The Technical Centre boasts cutting-edge technological equipment, such as acoustic, climatic and sunlight reproduction cameras, fatigue test benches for components and entire vehicles, engine analysis and test benches, pollution testing areas, test benches for bodywork rigidity and bending, test benches for component and vehicle safety, laser welding and material laboratories. In addition to this equipment, SEAT has an exclusive agreement with IDIADA (the automotive technology company) for crash tests, a high-speed circuit and an accelerated fatigue track, which are built in accordance with Volkswagen Group technology.

# The New Mobility Ecosystem





- Gap analysis on the **electric vehicle** value chain in Catalonia
- Gap analysis on the **connected and autonomous vehicle** value chain in Catalonia
- Study on the **retrofit**

# Key challenges faced by the industrialization of electromobility



Components de valor afegit



Materials nous i avançats



Reducció de pes



Noves capacitats productives



Seguretat elèctrica



Digitalització i Automatització



Sostenibilitat i circularitat



Experiència d'usuari

# Key challenges faced by the industrialization of connected and autonomous vehicles



Actions driven by OPTIMA Office in line with Transition Pathways.



Topic 8: Just transition		
Actions	Actors	Timeframe
<b>8.1. Social Dialogue</b>		
Communicate and regularly inform the public about the impacts, risks and opportunities linked to the transition, to reduce existing uncertainties, and help stakeholders embrace the transformation and take action to adapt	Social partners/Industry/MS/EU	S/M

# Showcasing the findings and establishment of multiple task forces and working groups

**Today!** March 11th, 2024

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Actions	Actors	Timeframe
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Communicate and regularly inform the public about the impacts, risks and opportunities linked to the transition, to reduce existing uncertainties, and help stakeholders embrace the transformation and take action to adapt	Social partners/Industry/MS/EU	S/M



# Thanks!


Riánsares López

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More information about the sector and related news:

<https://catalonia.com/key-industries-technologies/mobility-transportation/automotive>

