



2030: from Crisis to Opportunity

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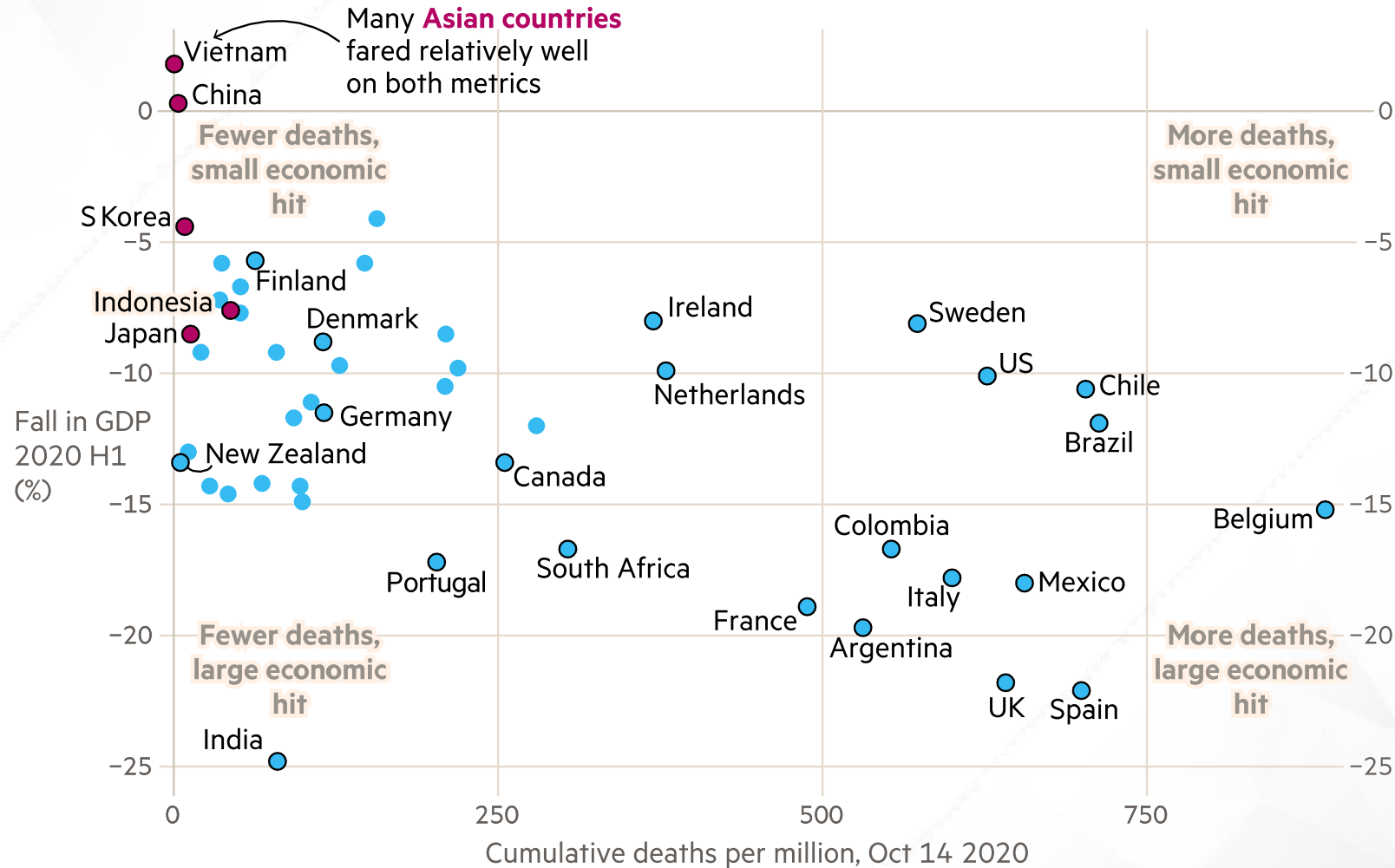
Making Industry 4.0 Real – 27 October 2020

The impact of the crisis

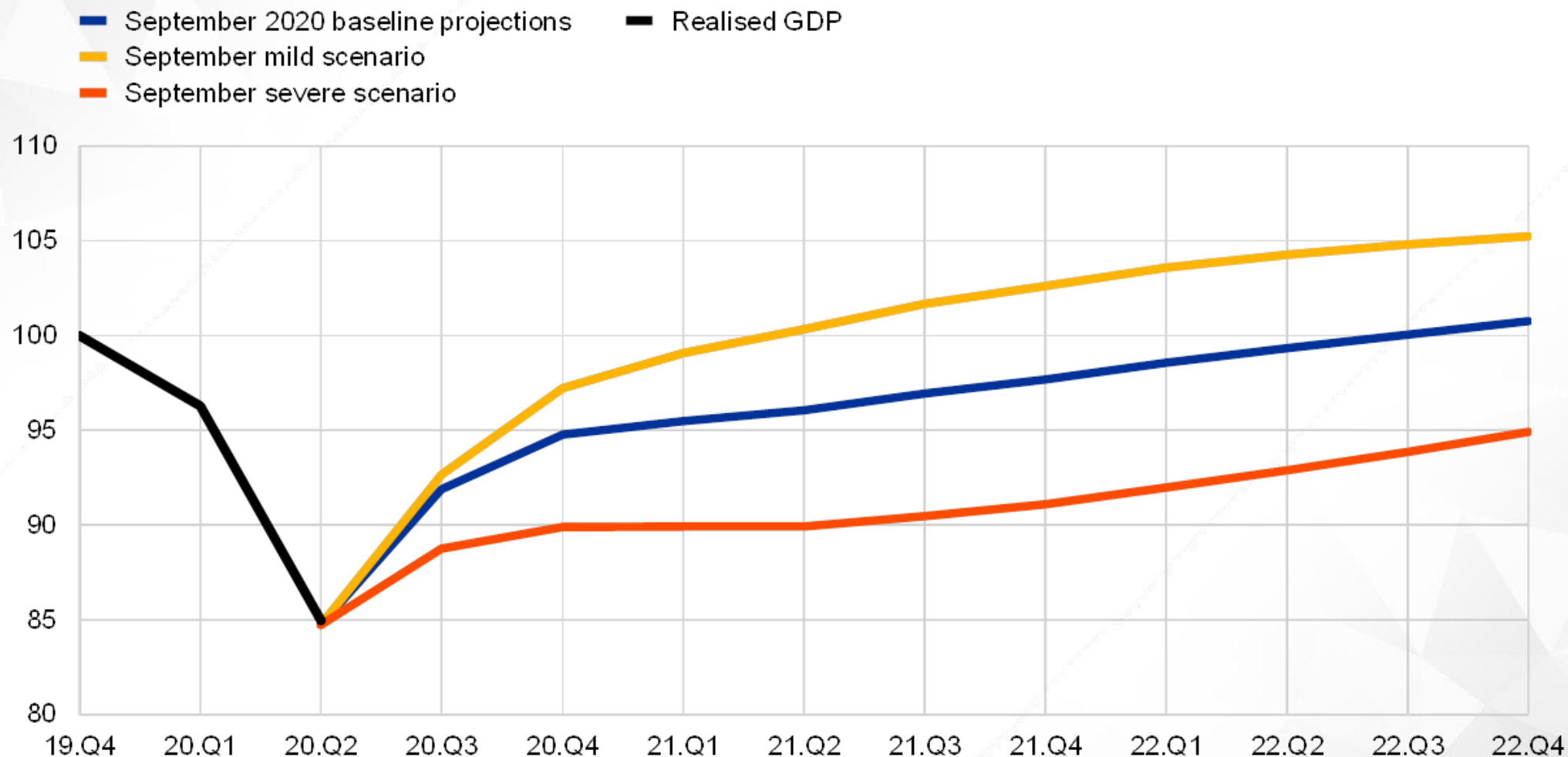
Global shutdown



Economic pain is higher where the outbreak is worse



A difficult recovery for the eurozone



Source: ECB, 2020 ECB staff macroeconomic projections

Europe's technology industries hit hard


Annual turnover

 **2,173**
billion EUR

Direct employment

 **11.5**
million people

Annual exports

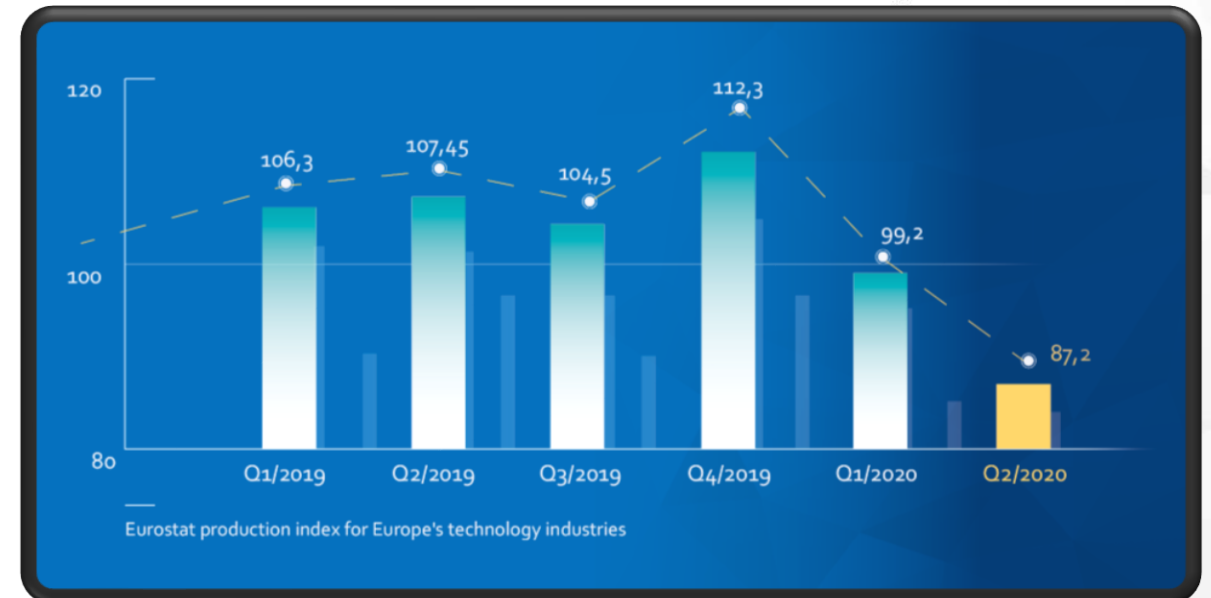
 **567**
billion EUR

Our industries comprise of

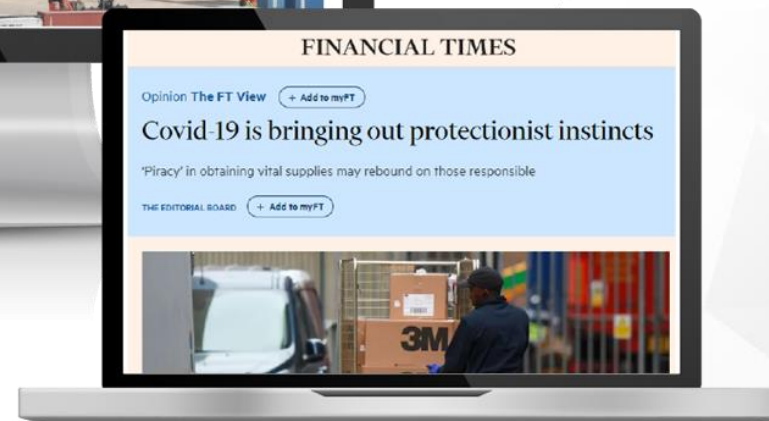
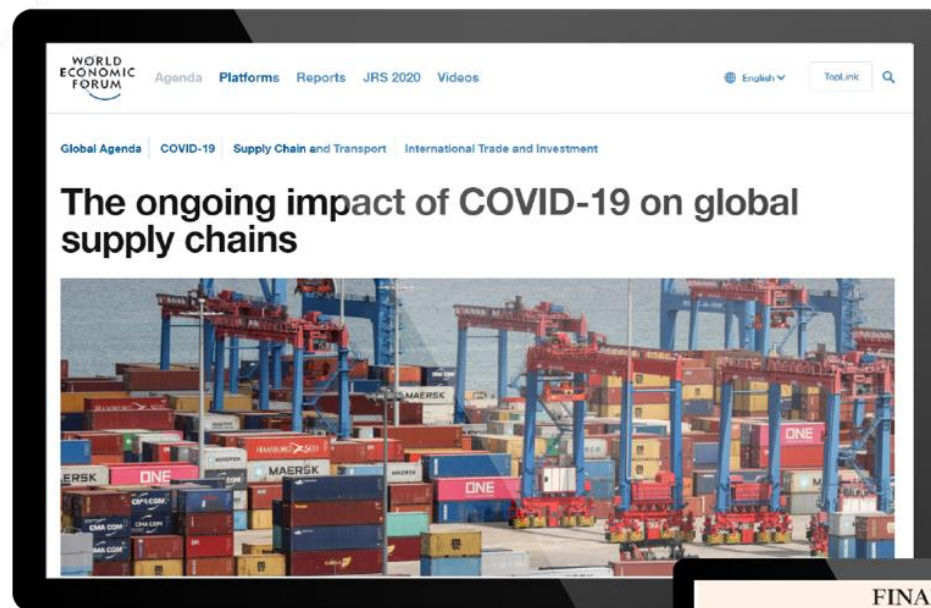
 **770,000**
companies
the vast majority of which are
SMEs and microbusinesses

The biggest production decline since WW2

- **19%** fall in total production
- **24.2%** fall in metal technology output
- **21%** fall in mechanical engineering output
- **14.2%** fall in electrical and electronics output
- **up to 5%** fall in total employment in 2020

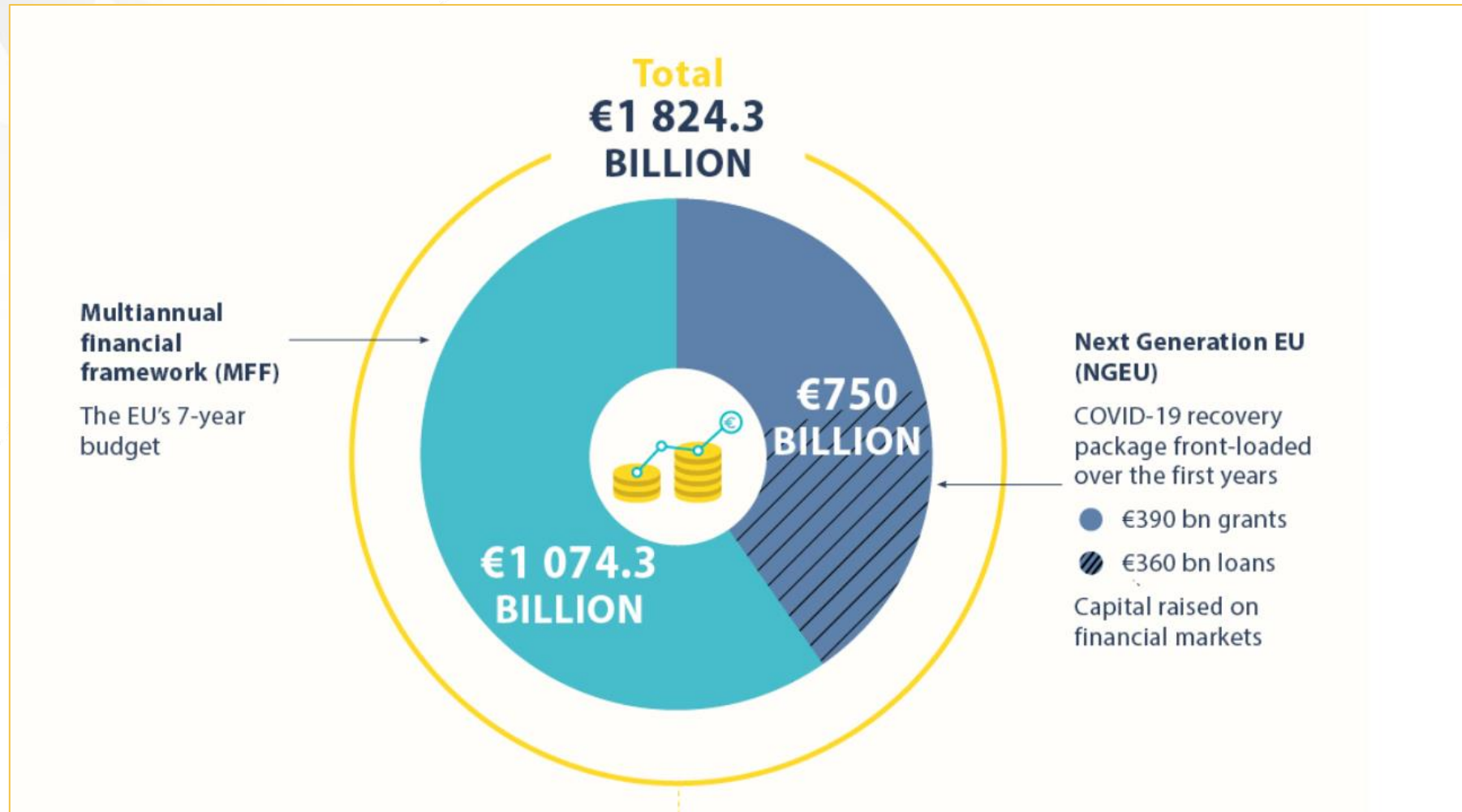


The crisis as a catalyst for “de-globalisation”?



Europe's path out of the crisis

Unprecedented EU stimulus for recovery



A pivotal moment for Europe

The rules for national recovery and resilience plans



align with EU priorities

boost **growth**, **job creation** and economic & social **resilience**



support the green transition

at least **37%** of resources contribute climate action and environmental sustainability



reflect country-specific challenges

in line with **European Semester** country-specific recommendations



foster digital transformation

at least **20%** of resources contribute to the EU's digital transition

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Manufacturing at the heart of Europe's renewal



Three strategic imperatives for Europe's industrial policy

EMBRACE

Embrace the innovation-led transformation of European industry



ENABLE

Enable European industry's long-term global leadership

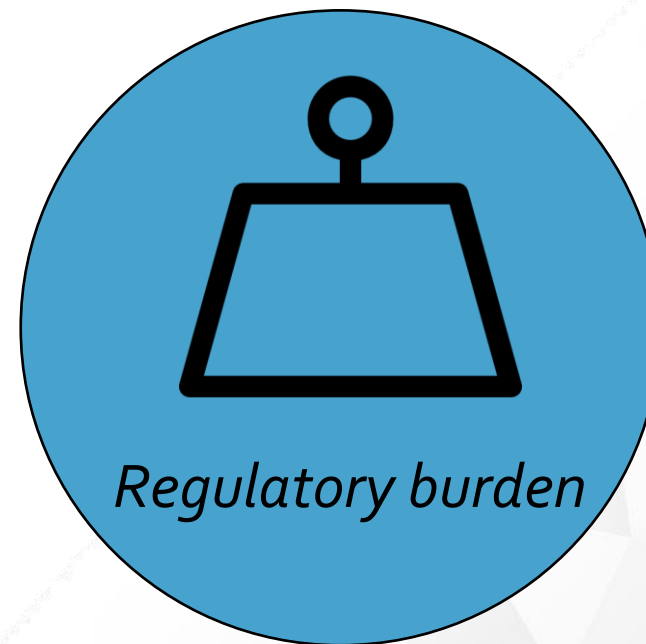
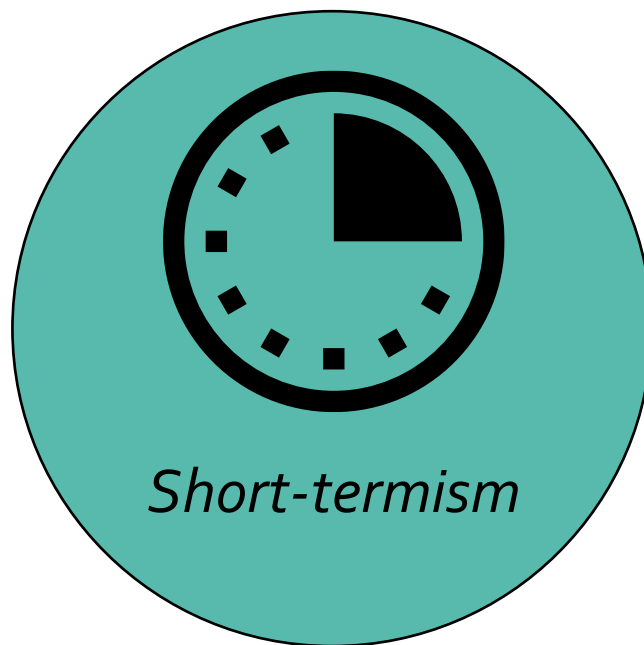


TRANSFORM

Transform societal challenges into future drivers of prosperity



Where things can go wrong

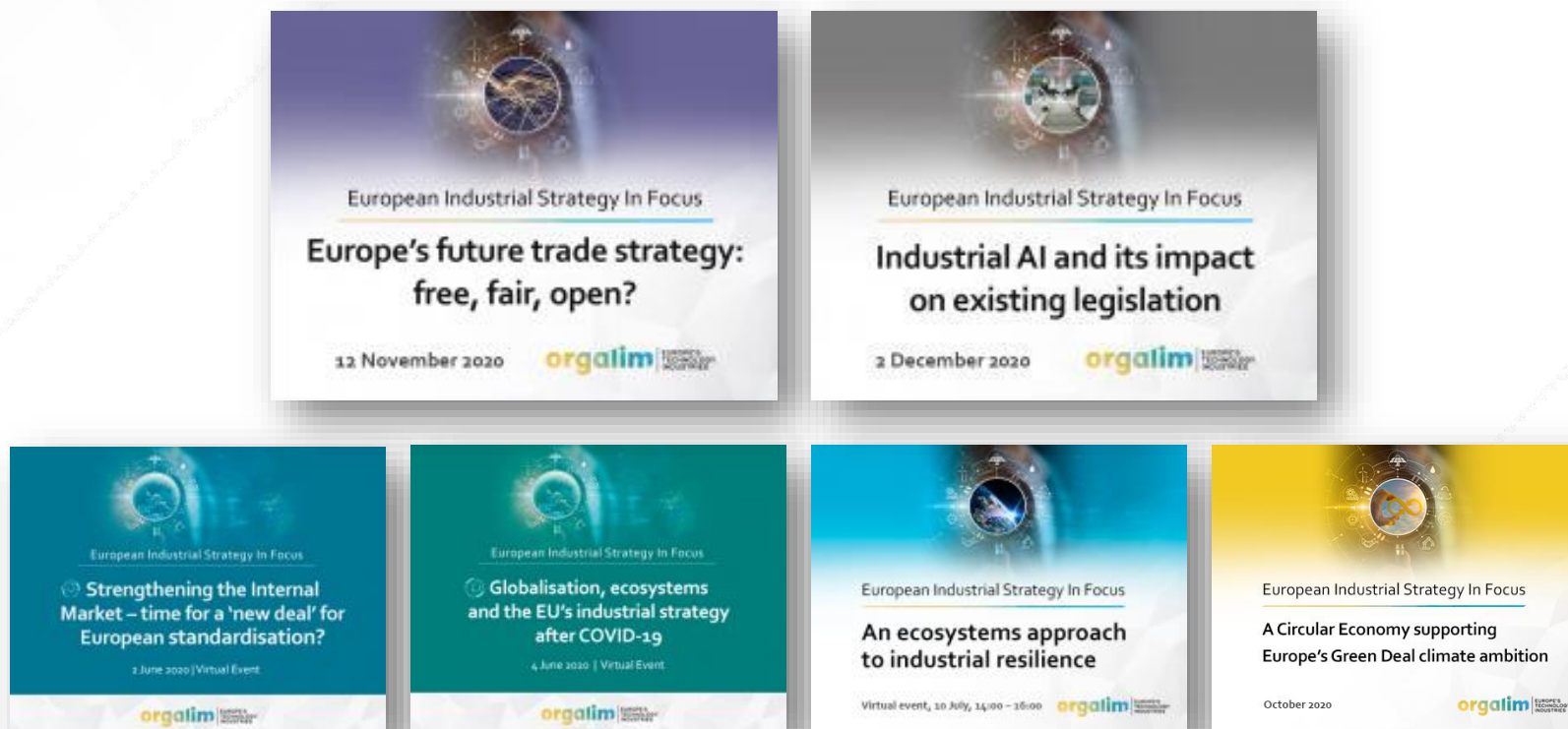


Promising Lead Markets for our industries



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Thank you



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