

Study Post Corona - New Requirements of the OEMs/Tier1s in 2020

Questionnaire - anonymous survey!

Which **customer** was involved in the specific case? An **OEM** or a **Tier1** (the concrete reference is important!)

- VW Seat Audi BMW Mercedes Skoda Porsche Opel Ford Fiat PSA Renault Nissan
 Bosch Conti ZF Gestamp Brose Mahle-Behr Hella Freudenberg Webasto Denso

To which **part family of the vehicle** do your components belong?

- electronics body powertrain chassis interior software e-drive driver assistance
 commodities functional parts systems/modules patent/special parts raw material/semi-finished components

1. Which **model types** are in the foreground of your current automotive business?

- small cars/mini compact class middleclass luxury class SUV vans others

2. How far is the volume drop, what proportion of the annual volume is missing due to the lockdown/production pause?

- non approx. 5% approx. 10% approx. 15% more than 15% other

What is the change to 2018 (since the re-sourcing has been taking place since 2018) decreasing constant increasing

3. What has changed in recent weeks, what remains the same in working with the OEMs/Tier1s?

What has changed or is changing?

What remains the same?

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4. What changes have there been or will there be in the **forecast** or the **call offs**?

Forecast: existing forecast confirmed no forecast at all new forecast on the level of..... % to the previous year

Call offs: only ...% of the forecasted quantity shorter termed different parts mix..... other

Remarks regarding the forecast or call offs

5. Did or does the customer(s) provide compensation for the shortfall in quantities for you (to support your business)?

Compensation none indirectly yes ... o to what extent completely partially %

Type of compensation larger delivery share with same part(s) with other parts other

6. Has there been a **re-sourcing** - shifting of parts or volumes towards you or away from your production?

shift towards you or shifting away from you | new part(s) and / or current part(s)

different mix of variants reduced variety wider spread other

Justification / background where from/where to?

7. Is there any information on **re-localizing** or **re-structuring** of the supplier chain?

Quotas are shifted back from Asia North/South America Eastern Europe - from country

Quotas are shifted away to Asia North/South America Eastern Europe - to country

Were there any changes in the ship to locations? no new locations added: domestic plants foreign plants

Background (politics, logistics reasons, modified plant structures)

8. What requests does the OEM / Tier1 have in terms of **production flexibility** and **production transparency** in the future?

a higher flexibility range along forecast? it remains at +/-15% new corridor plus/minus %

more transparency with regard to quality/production data, concrete:

new organizational or logistics requirements, concrete:

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9. What requests did the customer have in terms of **prices, price reductions or costs**?

- requests remain the same
- relief of demands/concessions
- new additional requests
- Explanations

10. What was the behaving style, tone and the **atmosphere** like during the first talks (also via video meetings)?

- unchanged:
- more friendly/partner-like:
- tougher:

11. What else has changed or will change in your opinion? (in addition to the topics mentioned above).
What will change with the OEMs/Tier1s due to the crisis until 2025?

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12. Has the Covid-19 crisis changed anything regarding the transition to electromobility? If so, in what way?

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13. Turnover size of your company (in Euro)

- up to 50 mil.
- up to 100 mil.
- 101 to 200 mil.
- 201 to 500 mil.
- 501 mil. up to 1 bil.
- > 1 bil..

14. How do you assess your supplier position with this customer? (multiple answers possible)

- B-/C-supplier
- A-supplier
- strategical supplier
- technology leader
- service leader (flexibility)
- main source
- second source
- regional source
- specialist
- other

15. Comments and remarks:

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Answer to:

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