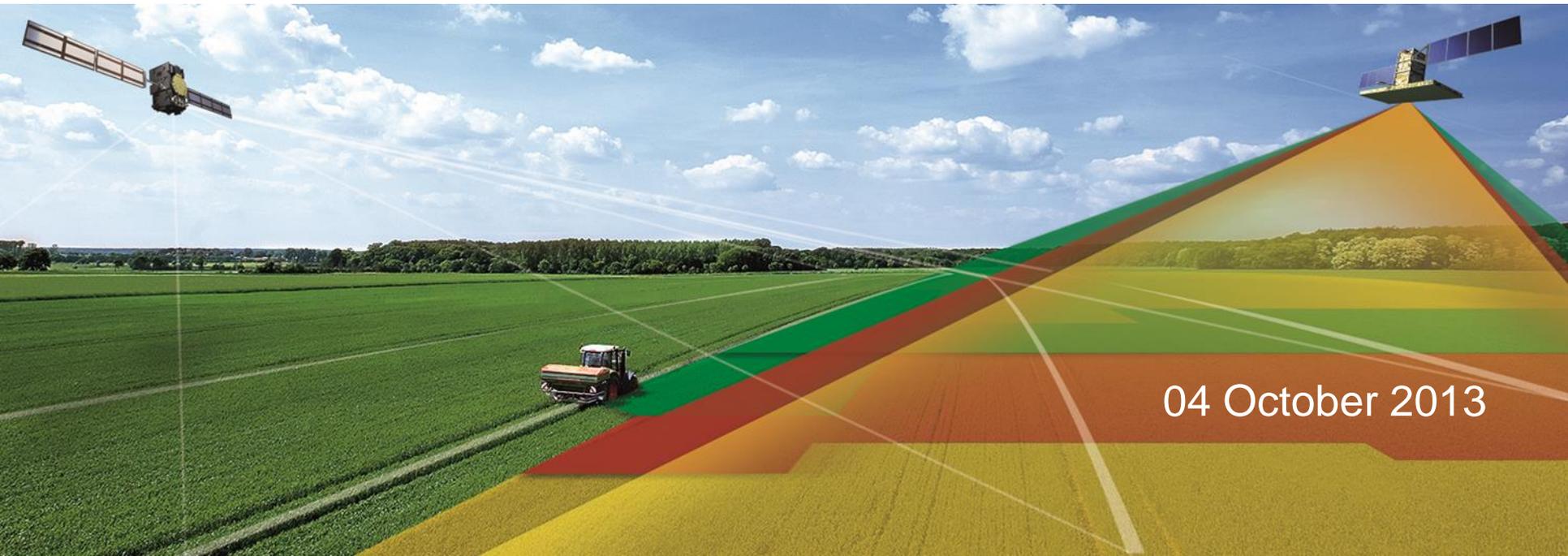


CEMA



EUROPEAN AGRICULTURAL MACHINERY

CEMA: defending the interests & raising the profile of the agricultural machinery industry in Brussels



04 October 2013

The voice of the innovators & developers of Agricultural Machinery in Europe

CEMA

EUROPEAN AGRICULTURAL MACHINERY

www.cema-agri.org



- ▶ **4,500 manufacturers** – large multinational companies & numerous SMEs
- ▶ **450 different machine types** – ranging from tractors & combine harvesters to plant protection equipment and precision seed drills
- ▶ **Aggregate annual turnover of €26 billion** – direct employment for 135,000 persons direct and another 125,000 persons in the distribution and service network

Agenda

- 1) The 'new' CEMA
- 2) Why strengthen your presence & lobby in Brussels?
- 3) CEMA @work: what is the 'new' CEMA doing?
- 4) Outlook: where do we go from here?
- 5) Discussion

1. The 'new' CEMA

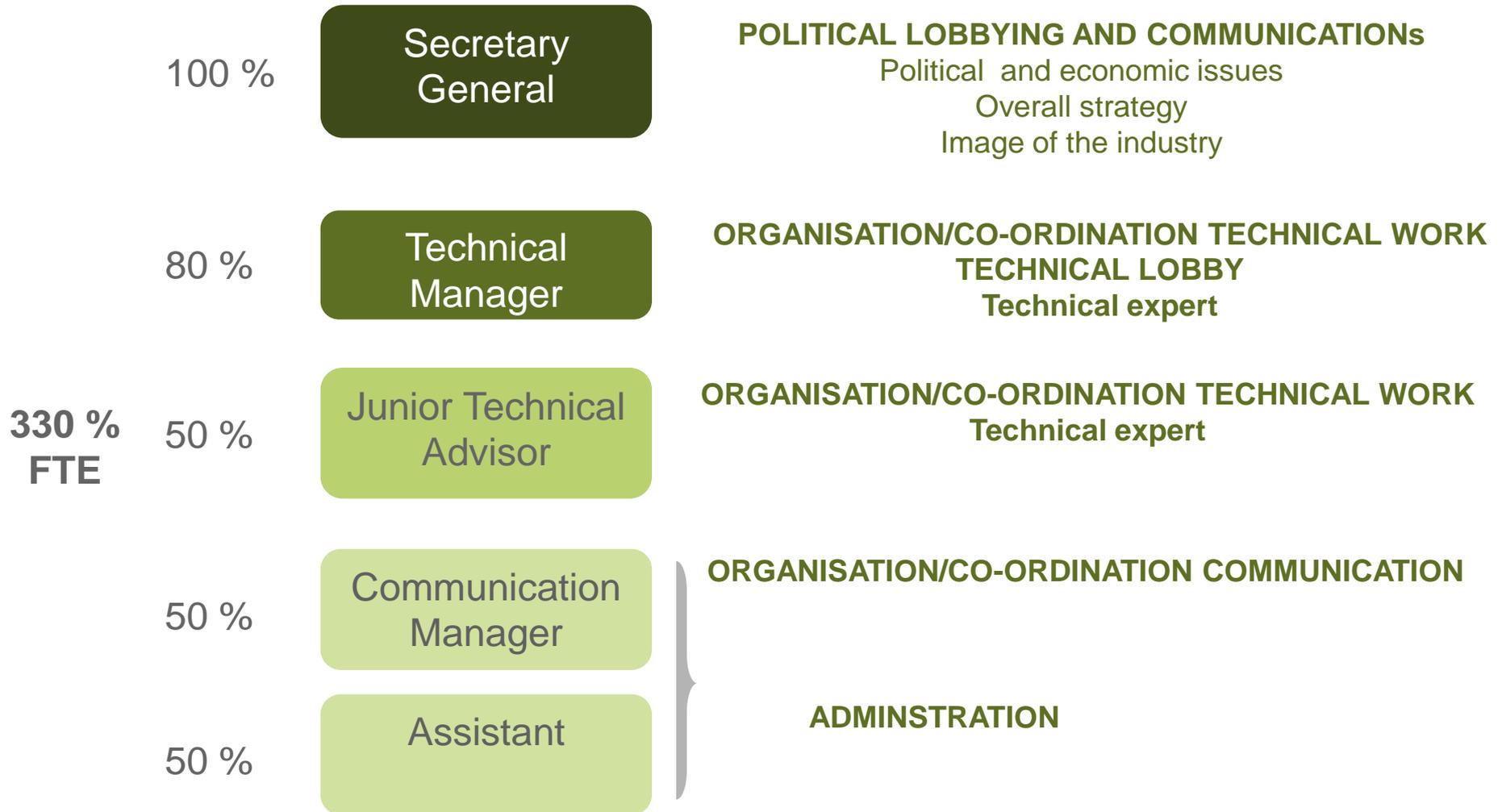


The 'new' CEMA in a nutshell

Change on 1 January 2013: latest chapter of a continuous, organic growth story in the past 10 years:

- ▶ A self-standing Brussels Secretariat (previously: co-hosted with the construction equipment association CECE)
- ▶ Doubling of budget & staff (from 2 to 4)
- ▶ A dedicated focus on
 - ▶ high-level political lobbying
 - ▶ stakeholder engagement
 - ▶ & communications

The new CEMA Secretariat structure



Priorities & activities

The new structure enables CEMA:

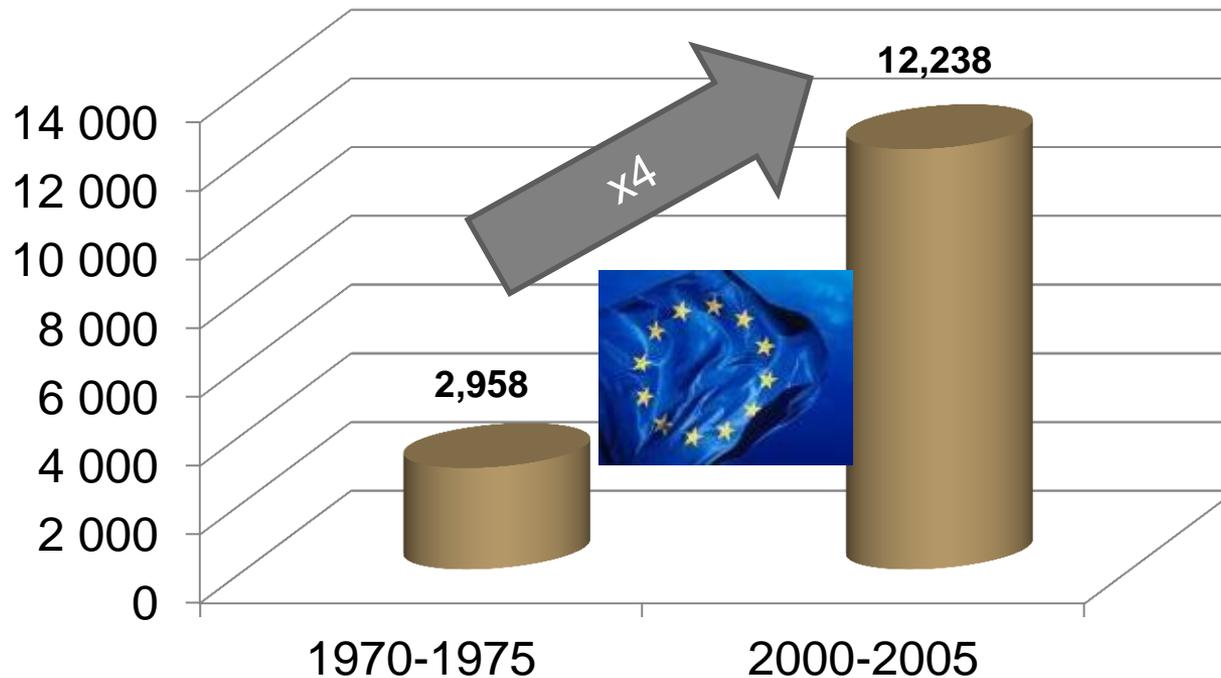
- ▶ To ***broaden the number of topics*** CEMA can credibly speak on
- ▶ To ***deepen CEMA's expertise*** on these issues
- ▶ To ***increase interaction*** & build a strong profile and supporters' network through systematic outreach:
 - To EU decision-makers
 - To relevant stakeholder groups
 - And via communications

2. Why strengthen your presence & lobby in Brussels?



Why lobby in Brussels?

Number of Directives, Regulations, Decisions and other legislative acts adopted by the EU



➤ **TODAY: c.80% of national legislation has its origin in Brussels!**

The changing face of EU advocacy & lobbying in Brussels

EU advocacy & lobbying:

- ▶ has become a lot faster in recent years
- ▶ competition is much bigger nowadays (15-20,000 full-time EU lobbyists)
- ▶ Facing a fully emancipated European Parliament
- ▶ Challenge is not (simply) anymore about connections and privileged access (there is much greater transparency now)...
- ▶ ...BUT increasingly about speaking convincingly and being heard in the debates broader debates that matter (strategic communications)!

An unofficial quote from a Commission official...

“The manner by which decisions are taken is changing: people in Brussels look less at factual, scientific analysis and more at political correctness!”

Changing front-lines in EU advocacy & lobbying

- ▶ The Commission very much seeks and depends on stakeholder input
- ▶ Most successful lobbyists are those that offer solutions to the problems of the legislator

‘Classical’ lobbying frontline:

- ▶ NGOs vs. Industry/business

Increasingly now:

- ▶ Industry vs. Industry

EU advocacy as a core element of strategic business development



Association for Emissions Control by Catalyst

Strong presence by the producers of emission control systems:

- ▶ Green Week stand, exhibition, side events...



Knowledge grows

- ▶ Ad Blue (Green Week stand)
- ▶ DAN Fertilizer (Fertilizers Europe stand, GW workshop)
- ▶ Precision Farming (Forum for Agriculture, Wikipedia)
- ▶ Agribusiness in Africa

EU Association Lobbying Effectiveness Report (Ellwood Atfield, 14 June 2013)

Key to success: to deliver against a clear strategy and be consulted early by the EU Institutions

To achieve favourable policy outcomes associations need:

- ▶ More efficient internal processes
- ▶ More timely entering (post-Lisbon) decision-making
- ▶ Senior people who really know EU politics and process
- ▶ Efficient teamwork between members and secretariat
- ▶ Coalition building
- ▶ Clarity of messaging



5 focus areas

1.

Members – *building an efficient, dynamic and mutually beneficial platform that delivers value to all members*

2.

Expertise & data – *analysing market developments to promote a better understanding of the environment in which agricultural machinery businesses operate in Europe*

3.

Stakeholders & strategic alliances – *forging closer relationships with relevant partner organisations and influencers*

4.

Lobbying & advocacy – *proactively shaping the regulatory and legislative framework for agricultural machinery in Europe*

5.

External communications – *raising the voice and profile of machinery producers in the European debate on agriculture*

Mapping of priorities – guiding principles

- ▶ **What does the association need to do/focus on in 2013 (and beyond)?**
- ▶ **On which issues can CEMA make a difference? Where do we stand the chance to achieve tangible successes?**
- ▶ **Which issues can help us raise the profile of CEMA and the industry to gain greater recognition and leverage among our target audiences?**

3. CEMA @work: what is the 'new' CEMA doing?



A heavy legislative agenda

Political

- Harvester Safeguard Measure (Eurasian CU)
- TTIP
- Market Surveillance
- NRMM Road Safety Harmonisation
- Air Quality & Emissions:
 - Revision of 97/68 (Stage V)
 - CO2
- Precision Farming
- Competitiveness of the industry
- CAP reform
- Health & Safety

Technical

- Mother Regulation 167/2013 :
 - Construction Safety
 - Functional Safety
 - Braking
 - RMI
- Emissions
- Accident database
- Cabin 4

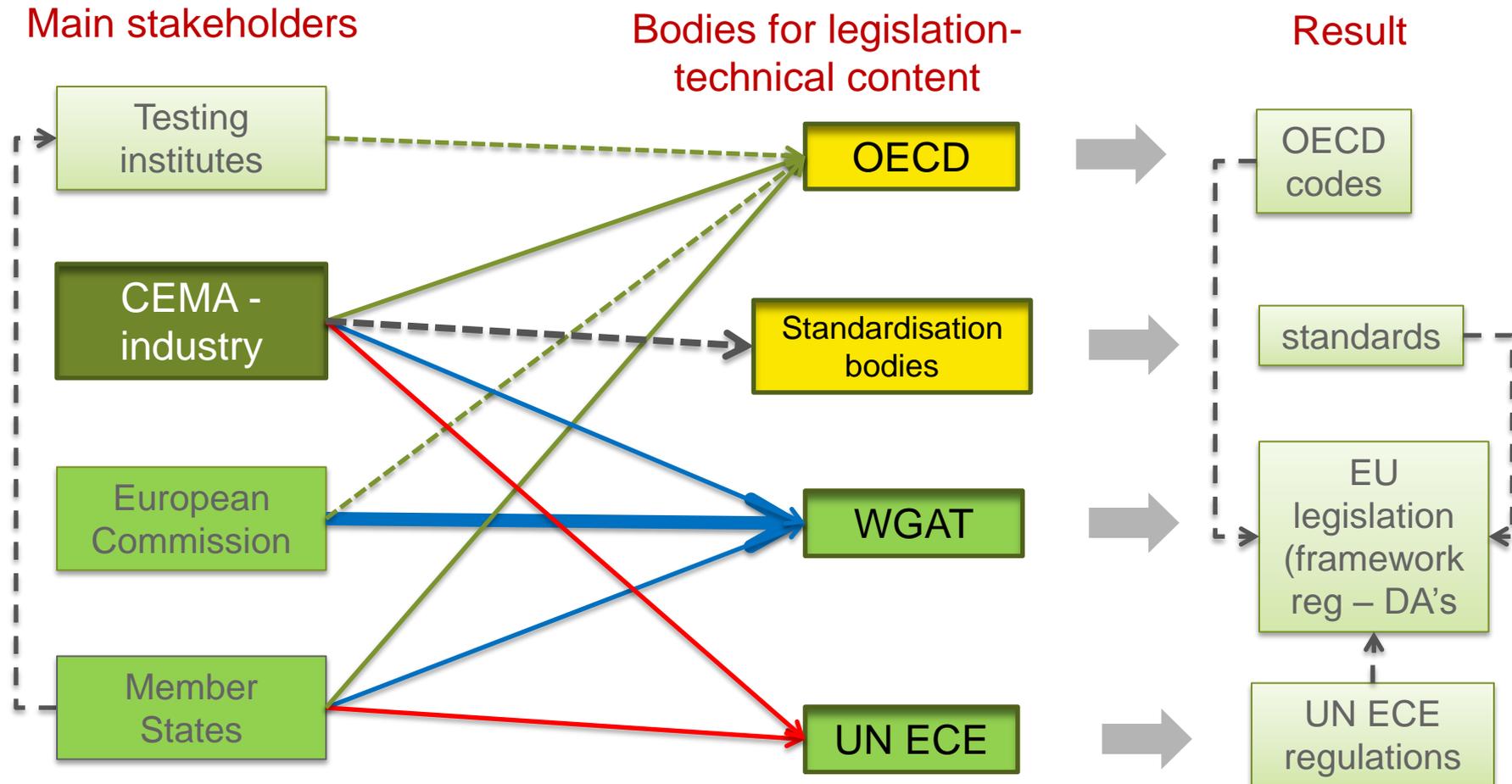
Type approval: delegated acts (PC1 PT21)

- Status on timeline (deadline to finish delegated acts end 2014)

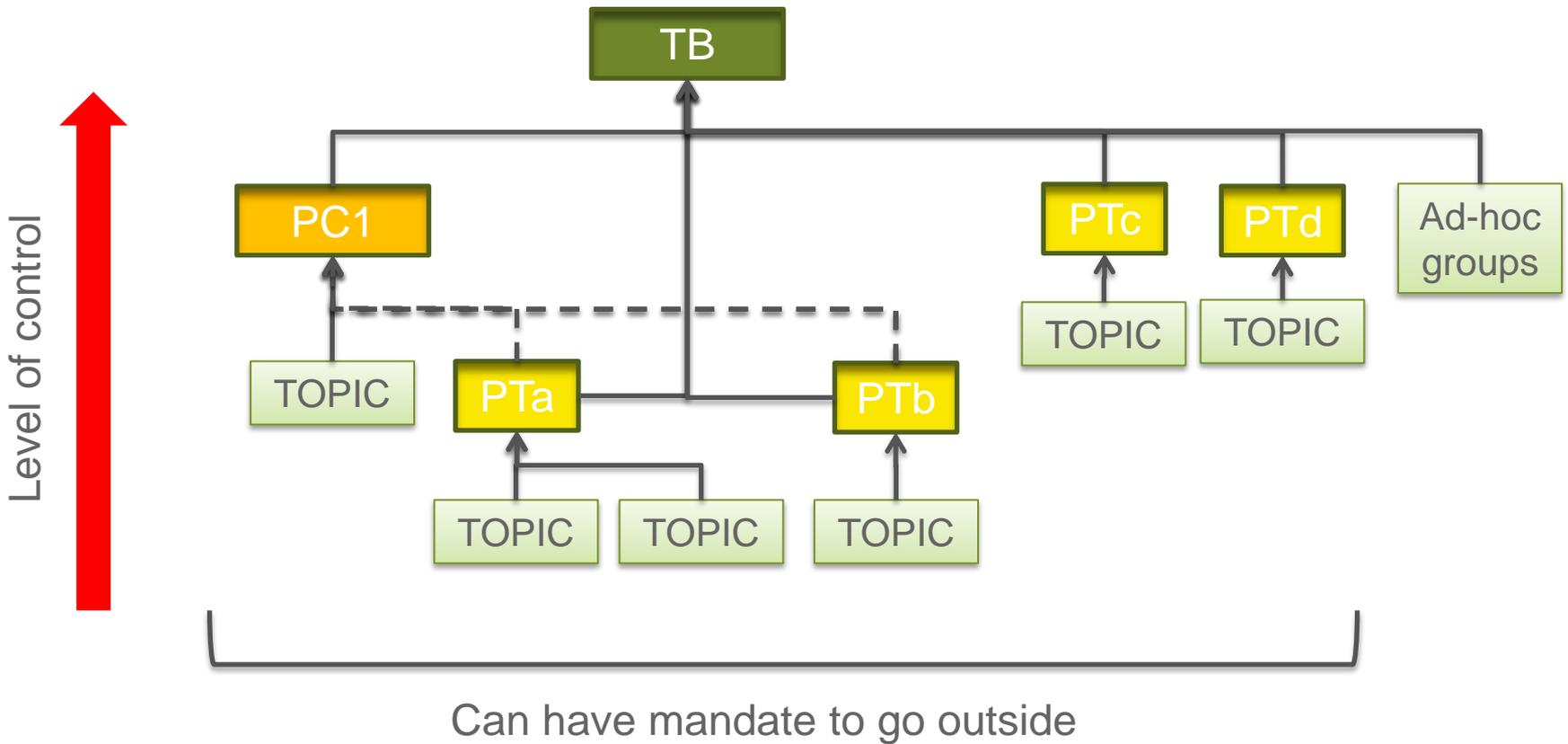
Legislative act

	<i>Regulation on vehicle functional safety requirements</i>	<i>Regulation on vehicle construction safety requirements</i>	<i>Regulation on environmental and propulsion performance requirements</i>	<i>Regulation on administrative requirements</i>	<i>Regulation on vehicle's braking requirements</i>	Timetable for L-category vehicles, used as baseline a) Provisions on access to Repair and Maintenance Information b) Provisions on Technical services
1st Draft	31/7/2013	31/7/2013	29/3/2013	2/12/2013	14/6/2013	1/3/2013
Comments by MS and stakeholders	31/10/2013	6/11/2013	31/5/2013	_____	4/10/2013	1/3/2013 (in parallel with 1 st Draft)
Interservice Consultation	3/12/2013	6/12/2013	5/7/2013	8/2/2014	8/11/2013	1/5/2013
Final Draft	17/1/2014	17/1/2014	20/9/2013	31/5/2014 (after MS and stakeholders consultation)	20/12/2013	8/5/2013
Adoption by COM	1/7/2014	1/7/2014	7/3/2014	31/7/2014	6/6/2014	15/10/2013

External organisation technical work



Internal organisation technical work



Access to Repair and Maintenance Information:

- ▶ CEMA ad-hoc group with experts since 1,5 years
- ▶ Commission started from a copy-past of the L-cat (motor cycles) with some adaptations as for the heavy duty vehicles.
- ▶ CEMA used the knowledge, built up, to make the necessary changes and argumentation;
- ▶ Many issues are already adapted according to CEMA view
- ▶ Remaining issues will be dealt with by bilateral contacts
 - ▶ Unknown standards - request for alternative text
 - ▶ Small volumes (exempted from a standardised format) – request for argumentation for CEMA increase of numbers
 - ▶ Commission will solve the issue of the small series (exempted totally from the provisions) for R/S

CEMA urges to postpone crucial issues on R&S to a second phase.

Alliances & partnerships with stakeholder groups

- ▶ Important to co-operate and align on issues of common relevance
- ▶ Building of issue-specific ad-hoc alliances, e.g.:
- ▶ Market Surveillance (CECE, CECIMO, EUROMAP, FEM)
- ▶ Productivity growth in agriculture (COPA-COGECA, Fertilizers Europe, ESA, ECPA)

PRODUCTIVITY GROWTH IN EUROPEAN AGRICULTURE, 25 September 2013

- ▶ Co-operation of all actors across the inputs chain to push for a supportive and coherent EU strategic agenda on productivity growth and innovation in the farming sector.
- ▶ Establish which actions have the greatest potential to increase productivity in the future, e.g. efficiency improvements and technical changes.



Business Climate Index Development

CEMA Business Climate Index (CBI)

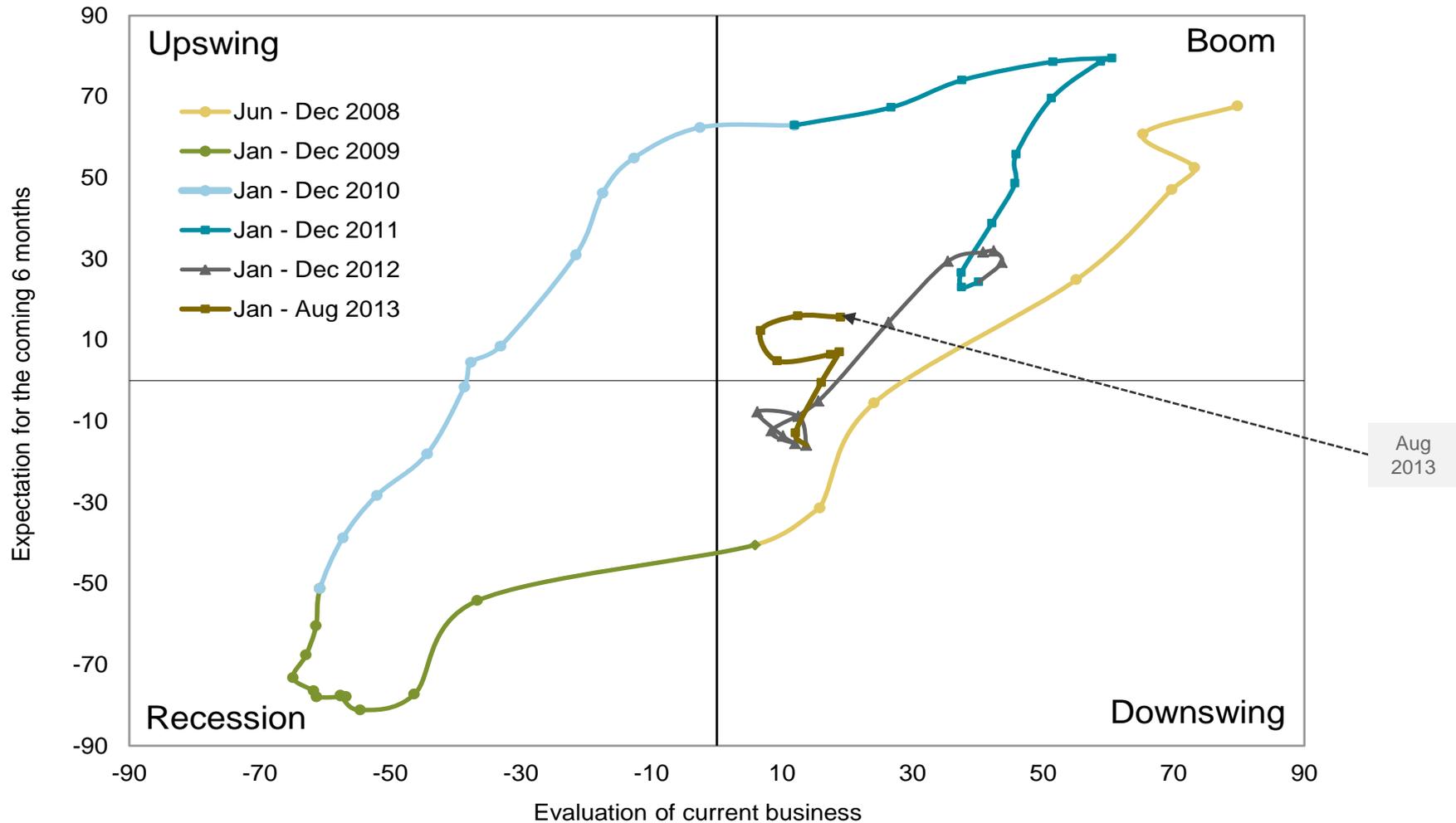


Source: CEMA Business Barometer

Index = sum of 1) evaluation of the current business situation and 2) turnover expectation, scale from -100 to +100

Business Climate

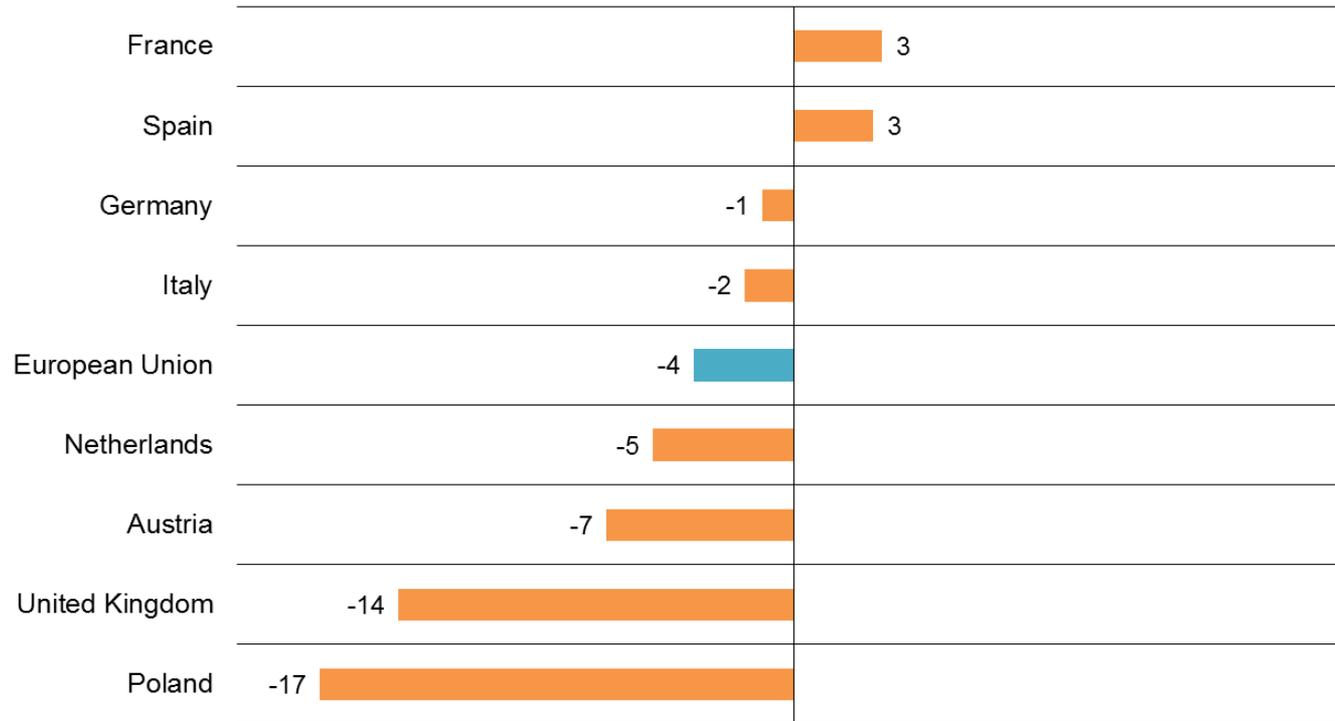
Illustration of Business Cycle



CEMA market forecast

European Agricultural Machinery Markets

estimated % change for 2013 for the biggest markets



Source: CEMA

► To be issued 3 times a year: April, October, January

Media coverage

CANAL 24 HORAS – TVE
Europa 2013

Home EU Insights Bulgaria Interview Analysis The Planet Business Culture Archiv

The air we breathe

In the autumn the Commission will present a new air pollution strategy for the EU



MARIA KOLEVA, BRUSSELS
7 June, 2013

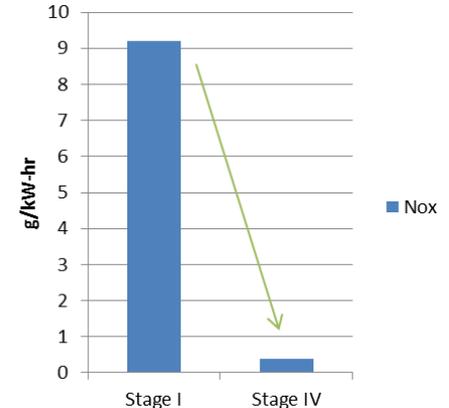
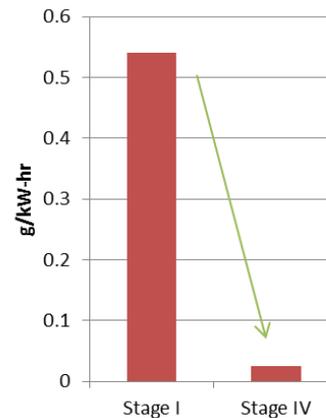


Advanced technologies reduce the carbon oxide emissions by 95%, says Heinz Arribas from European Agricultural Machinery



This year's Green Week, the biggest event in Europe on the environment policy is dedicated to the air and its main message was "Cleaner Air for All". More than 3,000 experts, business representatives, representatives from NGO sector, government organisations, EU institutions and academia debated on how to protect this vital resource in a time of increasingly high energy and industrial production, rise in the traffic of cars, aircrafts, ships, too much use of fossil fuels, etc.

An Eurobarometer survey shows that Europeans are aware of the impact of air quality on health. More than 78% of citizens want public authorities to take action at European, national and local levels, despite the crisis and austerity measures. For over three quarters of Europeans eutrophication is a serious problem in their country. Just over one in ten say this is not a very



Communications & Website

INTERNAL

- ▶ Closer and more frequent communications to and between members
- ▶ Newsletter on a monthly basis + internal newsletter

EXTERNAL

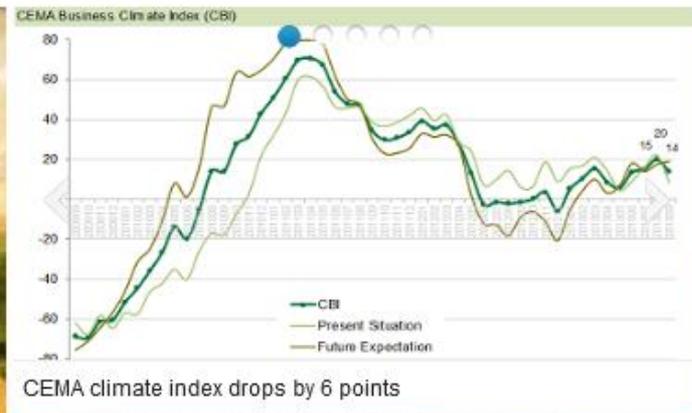
- ▶ Revised and expanded website (user friendliness/navigation, content, intranet)
- ▶ Regular press releases and develop press contacts
- ▶ Use of social media (LinkedIn, Twitter, YouTube, blogger engagement)

Welcome to CEMA - the voice of the innovators and developers of Agricultural Machinery in Europe

4,500 manufacturers, 28 billion Euro production volume, 450 different machine types, 10 national member associations, one common platform

[More about CEMA](#)

[Edit Box](#)



News & Events



Post date: 25 Sep, 2013
Making European Agriculture More Productive, Efficient & Sustainable
 COPA-COGECA & key partners discuss ways forward



Post date: 23 Sep, 2013
15/10: LAUNCH EVENT - Opening of the CEMA Exhibition on Precision Farming at the European Parliament
 To join, register by 4 October!



Post date: 11 Sep, 2013
"Productivity and Growth in European Agriculture" - Workshop
 Productivity growth is a key driver for the competitiveness of agriculture and its contribution to the general economy...

[More >](#)

Latest Publications

- Business Barometer** 18 Sep, 2013
 CEMA climate index drops by 6 points
- Position Papers** 9 Sep, 2013
 Clear legal basis needed to define role of tractor cab as protective measure when spraying
- Position Papers** 30 Aug, 2013
 NEW! CEMA position on the EU occupational safety and health policy framework

[All publications >](#)

Latest Newsletter

8 Sep, 2013
 Edition September 2013

Social media presence

CEMA - European Agricultural Machinery

Discussions Members Promotions Jobs Search Manage More... Share group

Start: Discussion Poll

Start a discussion or share something with the group...

Your Activity

Choose Your View

CEMA Business Barometer: index falls by 6 points · 1 day ago
To read the full report please follow this...

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Most Popular Discussions

CEMA supports a balanced approach on greening in the new CAP and welcomes COPA-COCEGA's position for more flexibility...

CAP reform: CEMA European Agricultural Machinery supports a balanced...

measures need to reflect the diversity of European farming and reduce administrative burden Brussels, 29 January 2013 – CEMA, the European association representing the manufacturers of agricultural machinery, welcomes the...

posted 2 months ago

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CEMA
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CEMA is the European Association representing the agricultural machinery industry.
Brussels - cema-agri.org

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CEMA and Agriculture Internationale to start media cooperation
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3 questions to CEMA President... Braking for tractors - YouT...

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Published on 8 May 2013
This is an interview with CEMA President Gilles Dryancour on the new EU braking rules for tractors.

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JCB Fastrac 7270, 270pk en 70kn
John Deere X749
agria 3400 Einachschlepper Tw...
John Deere X748 ultimate Tracto...
Manure Spreader





Invitation

to the **Opening Event** of the **CEMA Exhibition**

“Smart equipment for sustainable agriculture”

Precision Farming: producing more with less

On: *Tuesday, 15 October 2013*

From: *17:00-19:30h*

At: *the European Parliament Building, Brussels (3rd floor)*

To register, please reply to secretariat@cema-agri.org **by 4 October 2013**



2013 CECE-CEMA Summit

Constructing our future, advancing agriculture

Towards a competitive industrial production for Europe

What kind of EU framework to ensure sustained success?

- ▶ 16 & 17 October 2013, European Parliament, Brussels
- ▶ Under the patronage of Amalia Sartori MEP (EPP, Italy), Chair of the Industry Committee
- ▶ 2 Panel topics to focus on:
 - ▶ Better regulation to ensure fair competition and promote innovation
 - ▶ Competitive manufacturing – challenges & opportunities

Save the Date



Towards a competitive industrial production for Europe

Constructing our future, advancing agriculture

Speakers



Janes Potocnik
European Commissioner
for Environment



Amalia Sartori
European Parliament,
Chair of the Industry Committee



Paul Rübig
European Parliament,
Industry Committee



Olof Persson
President of AB Volvo and
CEO of the Volvo Group



Massimo Baldinato
Member of the Cabinet of
Vice President of the European
Commission Antonio Tajani

Dear Industry Colleagues,

This year's CECE-CEMA Summit will take place at the European Parliament and "The Hotel" on the 16th & 17th of October, under the title: *"Towards a competitive industrial production for Europe. Constructing our future, advancing agriculture"*.

CECE and CEMA represent two strong and innovative European manufacturing sectors that take on a leading role in EU's competitiveness.

During the two-day public event, members of the construction and agricultural machinery industries will debate with EU policy makers how to maintain a competitive industrial production sector in the EU.

The full agenda and registration details will be available as of the 1st of August: www.cece-cema.summit.eu

Please pencil the dates of the Summit in your agenda and join us on 16th-17th of October!

Kind regards,

Johann Sailer
President of CECE,
Committee for European
Construction Equipment

Gilles Dryancour
President of CEMA,
European Agricultural
Machinery Association

SAVE THE DATE
ON YOUR CALENDAR
TODAY!

EARLY BIRD RATES
FOR ACCOMMODATION
STARTING 1ST OF JUNE

Programme

WEDNESDAY, OCTOBER 16, 2013

14:00-18:00

ROOM PH3C50
EUROPEAN PARLIAMENT

OPENING SESSION

Towards a competitive industrial production for Europe

Keynote speeches by Members of the European Parliament, the European Commission and representatives of the two machinery industries.



SESSION 1

Panel on Smart regulation as a catalyst for innovation and fair competition



SESSION 2

Panel on Competitive manufacturing in Europe - the next seven years

Cocktail Reception at the European Parliament
& Gala Dinner at "The Hotel"

THURSDAY, OCTOBER 17, 2013

09:00-12:30

"THE HOTEL", BRUSSELS

CONNECTED MEETINGS

Sector Market Outlooks CECE&CEMA Technical Forum

ORGANISERS



CONTACT

info@cema-agri.org

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4. Outlook: where do we go from here?



CEMA is like a choir...

- ▶ Everybody has (and uses) his own voice...



- ▶ Yet we sound far more convincing when we speak together!

5. Discussion



Thank you!

Dr. Ulrich Adam
Secretary General

CEMA aisbl

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