

**naamsa**

THE AUTOMOTIVE BUSINESS COUNCIL



**naamsa | The Automotive Business Council - OEM Localisation Presentation : 26 August 2022**  
**MCSA LOCALISATION WORKSHOP**

## ANTI-COMPETITIVE POLICY STATEMENT

**naamsa**'s purpose is to actively and responsibly represent, advance and protect its members' collective, non-competitive interests across the new motor vehicle manufacturing sector. Various national and international laws restrict the exchange of information amongst competitors which might influence market conditions or lead to abuse. **naamsa** undertakes to ensure that deliberations at all its meetings [CEO Meetings; Committees; and Task Teams] are conducted in a manner that is compliant with the Competition Act, 1998 as amended from time to time. All participants affirm that they will conduct themselves in full compliance with South African and other relevant international legislation regarding anti-competitive actions and shall, in no way whatsoever, use, present, disclose, or share any information as an attempt to engage in conduct or exchange views, information and/or implement agreements and/or practices that may or will lessen competition in the automobile industry whether in a horizontal or vertical relationship [a detailed copy of the **naamsa** Competition Law Compliance Guidelines is available on request].

## SAAM 2035 vision

A globally competitive auto industry that actively contributes to the sustainable development of SA's productive economy, creating prosperity for industry stakeholders and broader society

**Objectives:** 1% of global vehicle production, 60% local content, 100% employment growth, competitiveness to leading competitor standards, doubling of Black-owned firm contributions, increased value addition within GVCs

Local market  
optimisation

1

Regional  
market  
development

2

Localisation

3

Infrastructure  
development

4

Industry  
transformation

5

Technology  
and associated  
skills  
development

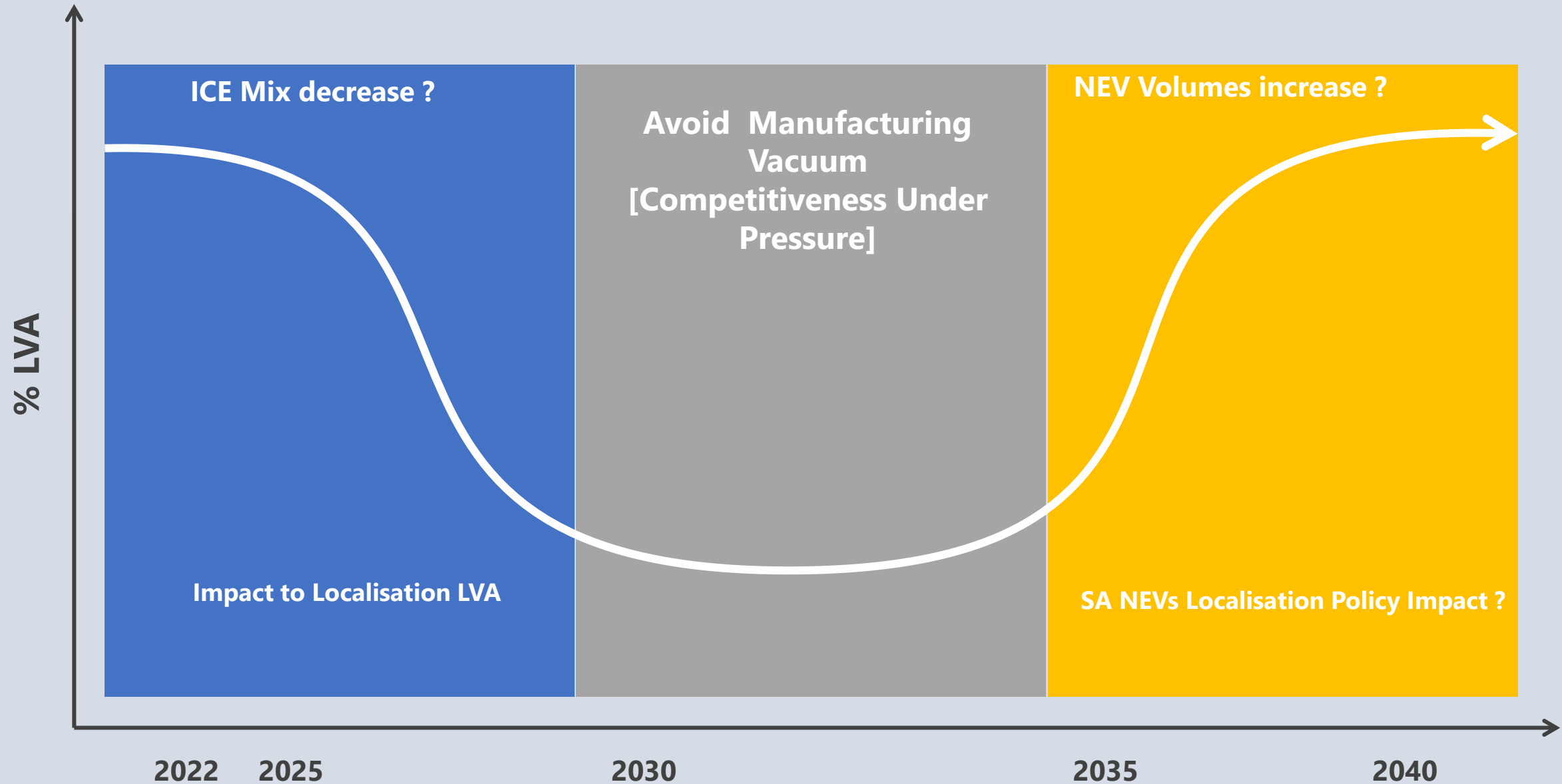
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Enabling policy post-2020 (phase 5 of the SAAMP)

Transformation ↑	STRATEGY	Widen	Deepen	Short-Term [2021]	Med-Term [2025]	Long-Term [2030 5]	NAAMSA OEM LC	NAACAM / ASCCI	DTIC	EOC Workstream	OTHER
	PILLAR 1 – OEM collaboration / supplier expansion – 10 projects	✓	✓	→			A / R (Widen)	R / A (Deepen)	I	I	C
	PILLAR 2 – OEM collaboration, new products [existing technology]	✓	✓	→			A / R (Widen)	R / A (Deepen)	I	I	C
	PILLAR 3 – New models attract new technology / suppliers	✓			→		R <sup>Tier1</sup>	R <sup>Tier2</sup>	R	A	I
	PILLAR 4 – Develop local materials		✓	→	→		R	R	R	A	I
	PILLAR 5 – Country level response to new technology driven trends	✓	✓		→		C	C	R	A	I
		<b>R</b> Responsible (Executes)	<b>A</b> Accountable (Owner)	<b>C</b> Consulted (Give inputs)	<b>I</b> Informed (In the loop)						



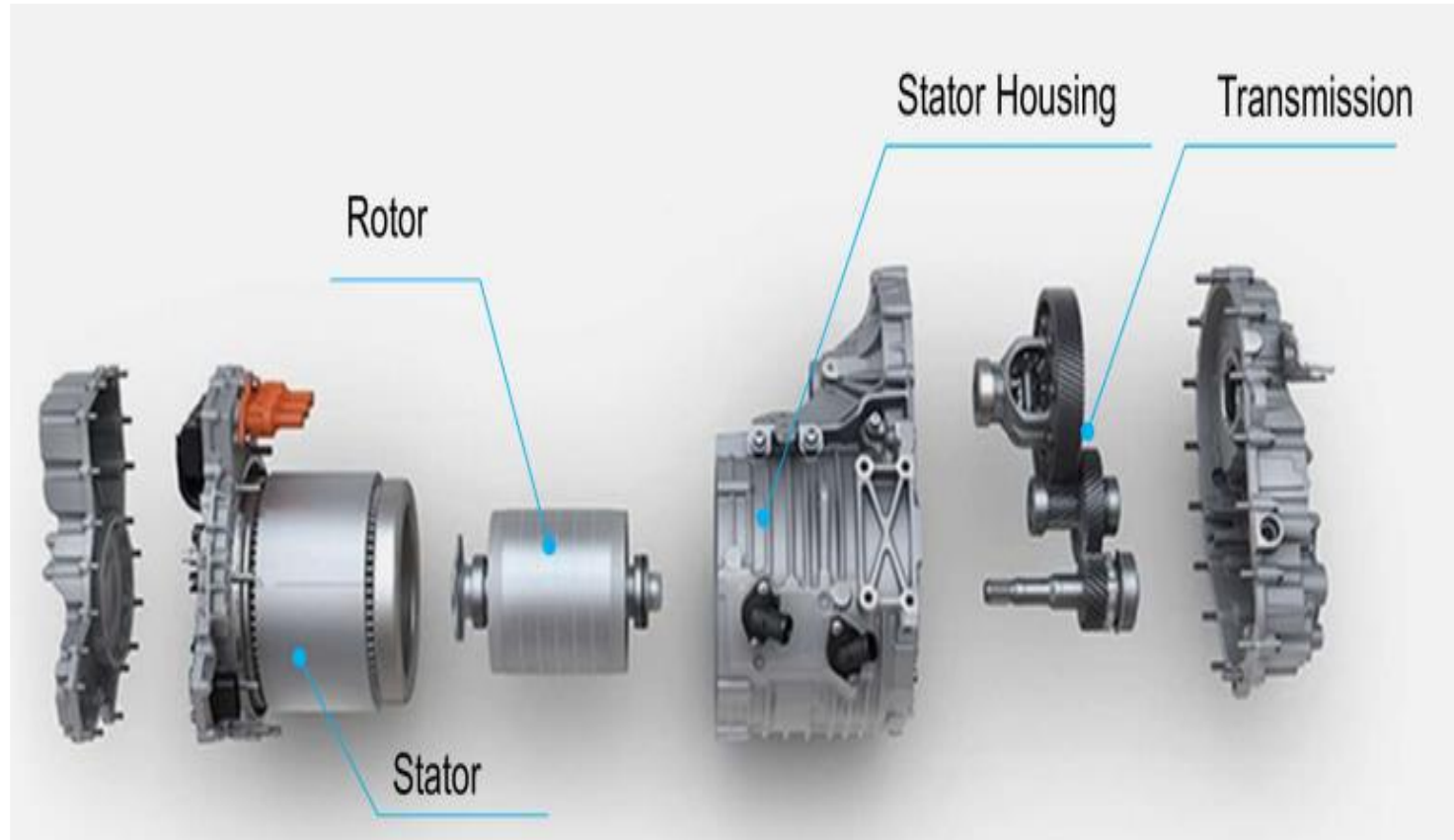
# LOCALISATION AND NEV [NEW ENERGY VEHICLE]







## New Supply Chain Dev – E Axle Example [Draft WIP]



### ~ HOUSINGS / CASINGS

Aluminum

Castings, Machining

### ~ TRANSMISSION / GEARING / SHAFTS

Steel

Pressing, Forging, Castings, Machining

### ~ STATOR / ROTOR / MOTOR / SHAFTS

Steel

Pressing, Casting, Machining

Copper

Wire Motor Winding

### ~ CONNECTORS

Plastic / Resin

Moulding, Extrusion

### ~ OTHER

Seals, Bearings, Sensors, Actuators, etc

naamsa Localisation Presentation | **END OF PRESENTATION !**