



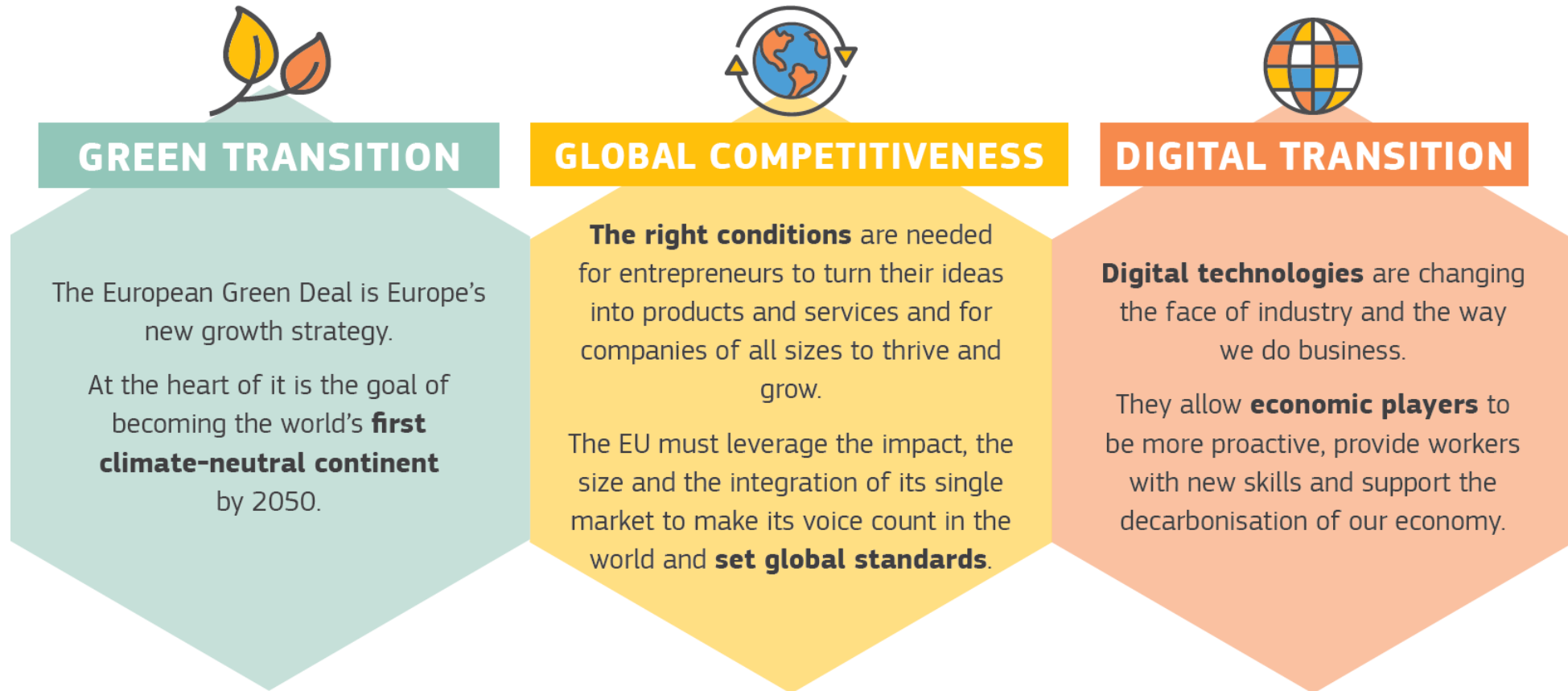
THE NEW INDUSTRIAL STRATEGY IN THE CONTEXT OF THE RECOVERY PLAN

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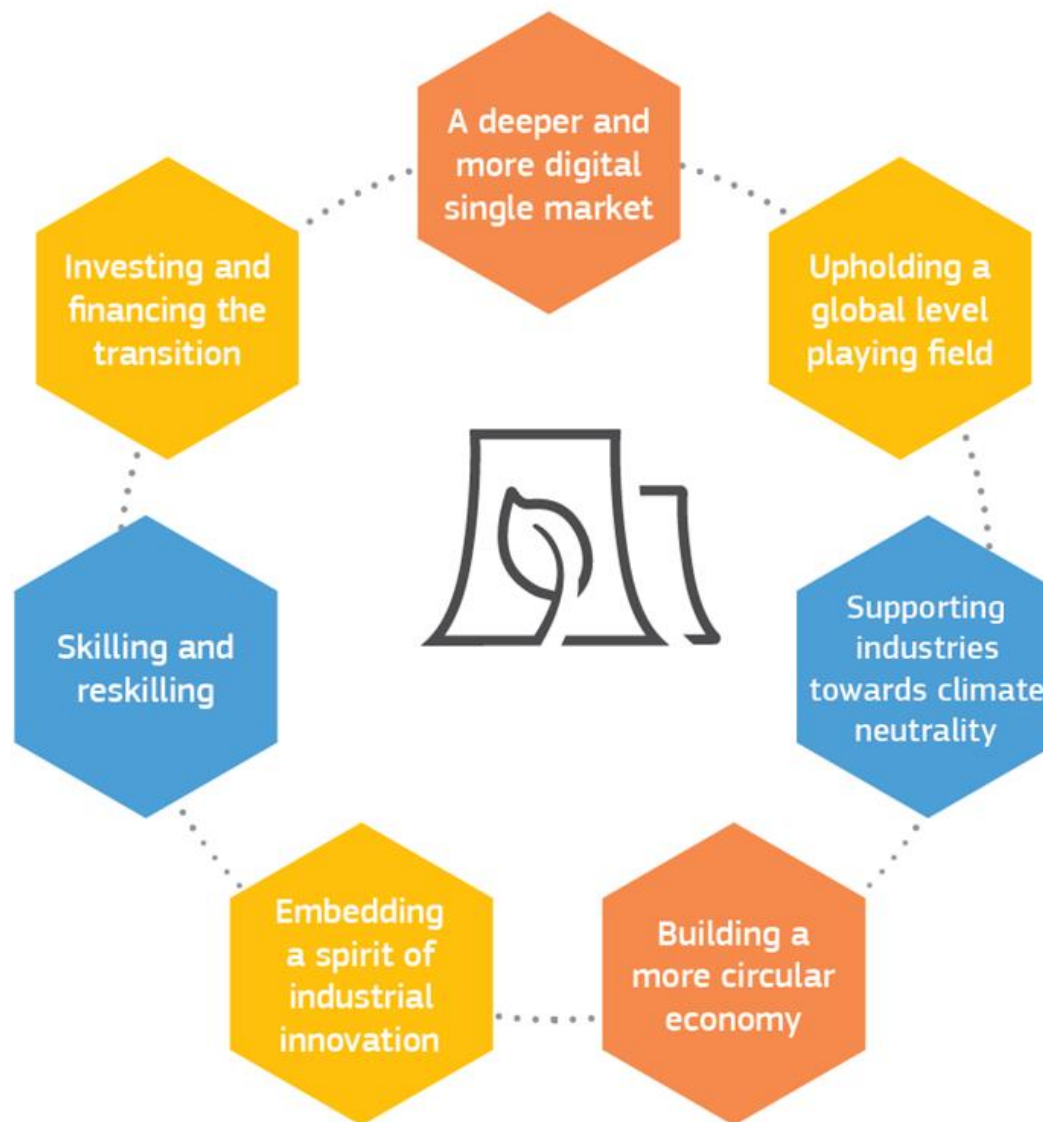


Key drivers of industrial transformation



Achieving industrial transformation

Fundamental factors in making Europe's industrial twin transformation happen



European industrial ecosystems bring together all crucial players for greener, more digital and more resilient industry



Economic backdrop: needs assessment

- ❑ Unprecedented economic shock: **2020 EU-GDP -7.4%** & only partial recovery in 2021 of 6.1%
- ❑ Significant **equity repair needs** (€720 billion-1.2 trillion in 2020): 35-50% of firms with 20+ employees to experience financing shortfalls by end 2020
- ❑ Total EU public & private **investment gaps of at least €1.5 trillion** in 2020-2021, including:
 - ✓ **Investment shortfall caused by crisis**
 - ✓ Needs to deliver **green & digital transitions**, strategic investment for **critical value chains**

Single market threatened:

uneven depth of recession
depending on economic structures
and capacity to absorb and
respond to the economic shock

Deep interlinkages between EU

economies: all European
industrial sectors rely on complex
supply chains spread across
several Member States

Lessons learned from 2008-09

financial crisis: reforms and
investment essential for recovery
and long-term growth

Common EU response with investment focus needed

Recovery Plan for Europe



Supporting Member States to recover, repair and emerge stronger from the crisis



Kick starting the economy and helping private investment to get moving again



Learning the lessons of the crisis and addressing Europe's strategic challenges



SURE / ESM /
EIB Guarantee

€540 billion

Next
Generation EU

€750 billion

Long-term
EU budget

€1100 billion

New 5th window under InvestEU

New Strategic European Investment window: to reinforce the strategic autonomy and resilience of the European economy in key areas.

STRATEGIC EUROPEAN INVESTMENT

From €0  € 31 bn

Eligible sectors

Critical infrastructure	Key enabling, transformative, green and digital technologies, and game-changing innovations	Manufacturing of ICT components and devices	Supply and stockpiling of critical inputs in strategic value chains	Critical technologies and inputs for security
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