ALLIANCE PRESS CONFERENCE

May 27, 2020
ALLIANCE NEW COOPERATION BUSINESS MODEL
MORE COMPETITIVENESS AND SUSTAINABLE PROFITABILITY

LEADER / FOLLOWER VEHICLE

LEADER / FOLLOWER TECHNOLOGY

REFERENCE REGION

ALLIANCE PURCHASING WITH FURTHER EFFICIENCY
LEADER / FOLLOWER VEHICLE - PRINCIPLES

- Increase Alliance common platform utilization
- Push standardization further, from platform to upper bodies
- Per segment, one mother vehicle (leader car) and sister vehicles engineered by the leading company with the support of the followers' team
- All leader & followers vehicles for all brands to be produced in the most competitive set-up, including grouping the production when relevant

Up to 40% model investment reduction for vehicle fully under this scheme.
## LEADER / FOLLOWER ALREADY APPLIED AND PERFORMING IN LCV

### LEADER

<table>
<thead>
<tr>
<th>VAN &amp; SMALL PU</th>
<th>1T PU</th>
</tr>
</thead>
<tbody>
<tr>
<td>RENAULT KANGOO SMALL VAN</td>
<td>NAVARA</td>
</tr>
<tr>
<td>RENAULT TRAFIC MEDIUM VAN</td>
<td></td>
</tr>
<tr>
<td>RENAULT MASTER HEAVY VAN</td>
<td>L200</td>
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<tr>
<td>LOGAN PU 0,5T PU</td>
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### FOLLOWER

<table>
<thead>
<tr>
<th>VAN &amp; SMALL PU</th>
<th>1T PU</th>
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<tbody>
<tr>
<td>NV250</td>
<td>ALASKAN</td>
</tr>
<tr>
<td>NV300</td>
<td></td>
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<tr>
<td>NV400</td>
<td></td>
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<tr>
<td>NP200</td>
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### MANUFACTURING

<table>
<thead>
<tr>
<th>X-MANUFACTURING IN LEADER PLANT – SANDOUVILLE ILLUSTRATION</th>
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</thead>
<tbody>
<tr>
<td>SANDOUVILLE</td>
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</table>
LEADER / FOLLOWER TECHNOLOGY – A PROVEN SCHEME

- **Build on the foundation**: each company continue to share the investment for platforms, powertrains and technologies

- **Build on the foundation**: each company to access to the broad range of capabilities demonstrating the technological leadership

- **Go beyond**: push further the Leader/Follower scheme already applied on some platforms and powertrains with confirmed benefit for efficiency

Pioneer of mass production EV
Close to 1 million unit produced

600,000+ units worldwide with autonomous driving technology
MAIN LEADER AND FOLLOWER TECHNOLOGY DOMAINS
EXISTING & EXTENDED

AUTONOMOUS DRIVING

CONNECTED CAR
- Android Platform
- “China” Platform

E-POWERTRAIN
- CMF-A/B ePT
- CMF-EV ePT

POWERTRAIN*

- Renault: Small Gasoline, Diesel
- Nissan: big Gasoline, Kei-CAR
- Mitsubishi: PHEV for C/D segment

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platform
- Kei-Car PF
- CMF-A
- CMF-B
- CMF-C/D
- CMF-EV

EXISTING DOMAINS
EXTENDED DOMAINS
REFERENCE REGION - PRINCIPLES

- Each company will focus on its core regions with the aim to be among the most competitive and serve as a reference to the others to enhance their competitiveness.

- Leader / Follower approach starts from the companies’ product portfolio strategy and consequently to the industrial footprint.

- Increase the number of procured services among the companies in each region, covering common business processes and resource sharing.
REFERENCE REGIONS – THE COMPLEMENTARY STRENGTHS OF THE ALLIANCE MEMBERS

ALLIANCE COVERS 100% OF MAIN AUTOMOTIVE REGIONS

NAFTA
MERCOSUL
EMEA
INDIA
CHINA
SOUTH-KOREA
JAPAN
ASEAN
OCEANIA
# Platform and Production Rationalisation

**Brazil**

<table>
<thead>
<tr>
<th><strong>Actual</strong></th>
<th><strong>Future</strong></th>
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<tbody>
<tr>
<td>4 Platform Variants</td>
<td>1 Platform</td>
</tr>
<tr>
<td>6 Models</td>
<td>7 Models</td>
</tr>
</tbody>
</table>

- **Actual Models:**
  - SANDERO
  - STEPWAY
  - LOGAN
  - CAPTUR
  - MARCH
  - KICKS

- **Future Models:**
  - CMF-B Hatchback & SUV

- **Plants:**
  - 2 Plants
    - HATCHBACK
    - SUV
PRODUCTS UNDER LEADER FOLLOWER SCHEME
EUROPE & RUSSIA

**LCV VAN**
- • Pursue Leader / Follower model

**C SUV**
- • Russia - 2023
- • Renewal post 2025 : Nissan leader worldwide

**B SUV**
- • Russia – 2022
- • Future renewal by 2025 for Europe

**B**
- • Future development & renewal
**FOCUSED APPLICATION IN OTHER REGIONS**

**JAPAN, ASEAN AND OCEANIA**

**JAPAN**
- Nissan is a leader for Kei Platform
- Kei is Nissan and MMC’s Joint planning, R&D is done by Nissan, and Production is done by MMC

**ASEAN**
- Expand MMC’s OEM supply of Xpander to Nissan (Livina) in ASEAN.
- Collaboration in production in ASEAN. For example in Philippines.

**OCEANIA**
- OEM supply of VAN from Renault to Mitsubishi in Australia and New Zealand
ALLIANCE EFFICIENCY WILL IMPROVE
WITH INCREASING MODELS UNDER LEADER/FOLLOWER

RATIONALIZED NUMBER OF MODELS
WILL IMPROVE ECONOMY OF SCALE

MORE MODELS UNDER LEADER/FOLLOWER SCHEME
WILL IMPROVE R&D-CAPEX/CAR RATIO

* excluding dedicated models for US and China
THANK YOU
QUESTIONS & ANSWERS SESSION