

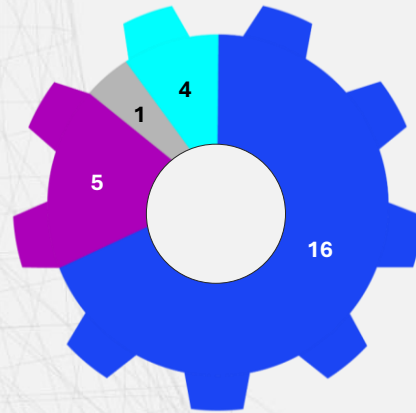
Opportunities and Frameworks for Pre-Competitive Collaboration

ALBA Workshop on 20th May 2026

Dr. Begüm Bozkaya // Senior Technical Manager // CBI

OEM Expert Survey

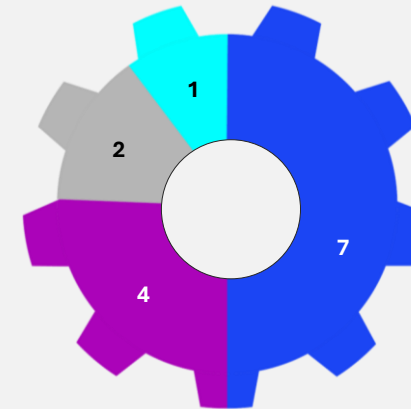
AUTOMOTIVE POWERNET (12V) BATTERY SURVEY



Regions respondents are from::

- China
- Europe
- Japan
- Unknown

FUNCTIONAL SAFETY SURVEY



Regions respondents are from:

- China
- Europe
- North America
- Unknown

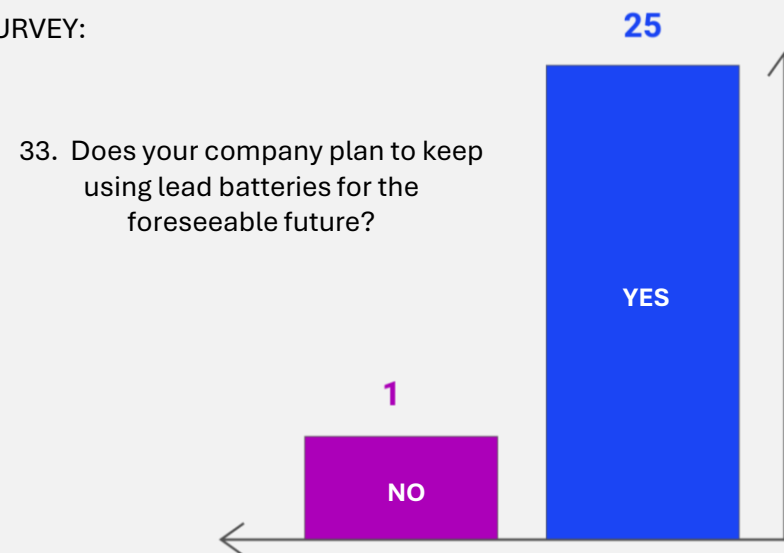
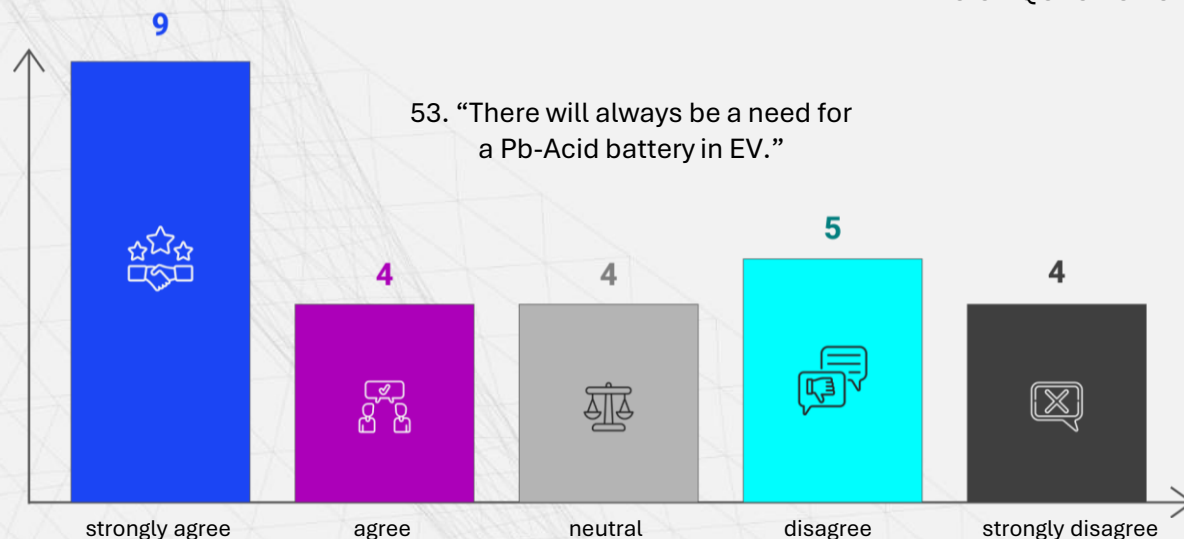
- Two questionnaires were conducted (survey period: June-July 2024)
 - A 12 V battery survey looking at efficacy and issues for EVs (+50 questions). **26 automotive OEM respondents**
 - A Functional Safety (FuSa) focused questionnaire (+90 questions). **14 automotive OEM respondents.**

- The overall objectives were to gather:
 - Sentiment for lead batteries in automotive applications
 - Market trends for 3-6 years.
 - FuSa in current or near-future (3y) applications: 12 V power-supply requirements and role anticipated for lead batteries.
 - Gathering technical info on specific requirements, including servicing strategy, ASIL rating, monitoring algorithms.

Executive Summary: 12 V Battery Survey

- Most OEMs expect and have planned for lead batteries to stay.
- Nevertheless, technology alternatives are continuously being evaluated, and seen as viable alternatives primarily for EVs.
- This report covers current status, an example is question 33. The report also covers OEM's perspectives on the future (~5 years from now) – such as the excerpt from question 53.
- Generally speaking, for starter applications (ICE, hybrid), lead faces little competition – for EVs there is a need to innovate lead batteries for AUX (non-starter) application.

EXAMPLES OF QUESTIONS FROM THE SURVEY:



Key Questions and Next Steps

- Did you use the OEM survey results internally or share them externally when you speak to your customers?
- Shall we run a shorter follow-up survey to better understand current OEM priorities?
- What opportunities do you see for future pre-competitive collaboration?
- ...