

Ms Ursula von der Leyen
President
European Commission
Rue de la Loi, 200
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The "European vehicle": Choosing sovereignty over dependency

President, dear Ms von der Leyen,

Responsible for 75% of the total value of a vehicle, automotive suppliers are the engine of Europe's prosperity. This sector creates substantial economic value, drives R&D, and supports millions of families across the continent. Yet, today, our companies are facing unprecedented friction.

We welcome competition as a driver of efficiency and innovation. However, when pressure is driven by distortive subsidies, price dumping, state-backed overcapacities, and unilateral tariffs, European producers are placed at a structural disadvantage and face unfair competition. We remain committed to international trade with our partners around the globe. But international trade needs to remain fair. We are asking to restore this fairness and a level playing field.

The signs are evident in the trade balance sheets of 2025. Imports of automotive components from China have reached €8.2 billion. We have witnessed a startling reversal: a comfortable trade surplus of nearly €7 billion just five years ago has declined into a deficit of €0.7 billion. Strikingly, this shift concerns traditional automotive components, segments in which Europe has historically been a dominant player.

But importing the cheapest technology today hollows out our innovation capacity tomorrow. If we allow our value chains to erode, we will lose factories but also our strategic autonomy. We risk trading European technological sovereignty for a permanent dependency on lower-cost and less regulated regions. The social cost of this trajectory has already been assessed: a recent [Roland Berger study](#) warns that up to 350,000 European jobs by 2030 can be lost to other regions if we do not act.

As preparations advance on the Industrial Accelerator Act, ongoing policy discussions increasingly recognise that public procurement and public subsidies and other incentives, e.g. a super-credit in the CO2 regulation must be firmly tied to genuine European value creation.

For Europe's automotive supply industry, the definition of a "European vehicle" will be the decisive factor. Incentives must reinforce industrial capacities in Europe, strengthen resilient supply chains, and

secure high-quality jobs. This is particularly vital at a time when competitiveness measures are still to be implemented and global competition remains intense.

We need a credible and ambitious framework. A “European vehicle” definition should require 75% local content or more at the vehicle level, excluding batteries, and ensuring that most of the value is generated within our borders.

In addition, the Industrial Accelerator Act must establish gradual and targeted thresholds for critical technologies, notably electric powertrains and electrical & electronic (E&E) components. This measure is about recognising where that value comes from.

Europe's automotive suppliers are currently investing heavily in decarbonisation and digitalisation. A clear and ambitious definition of a “European vehicle” is key to ensuring that the mobility transformation and the value and jobs it creates, remains anchored in Europe.

Let us choose sovereignty over dependency. Let us choose European value.



Matthias Zink
President



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