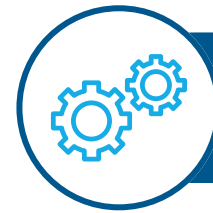


⚠ Automotive supply industry at risk!



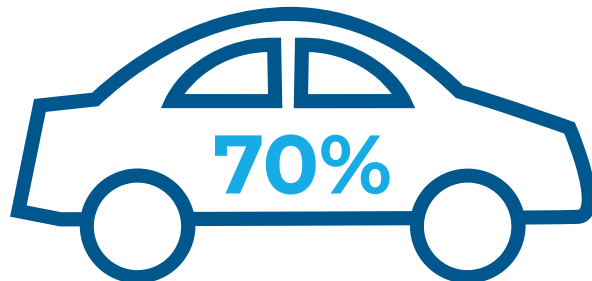
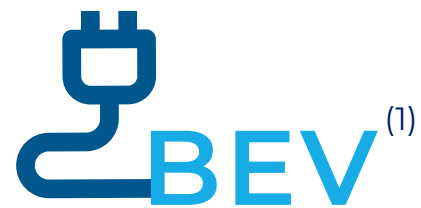
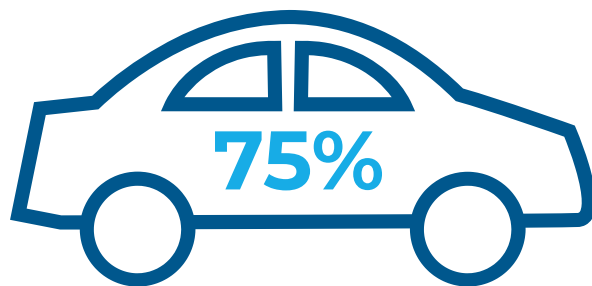
Footprint under pressure



85%

of car components are assembled in Europe

EU value share per component:



(1) Excluding battery

Critical component value at risk:
60% for ICEs, 70% for BEVs



Competitiveness gap

Production costs in Europe are

15-35% higher than in best cost countries



Relocation and production plants moving abroad



Jobs on the line

Automotive suppliers employ

1.7 million

people in the European Union

300,000 - 350,000

suppliers jobs at risk in then **next 5 years**



EU could lose up to **23%** per car in value by 2030, and a further **20+%** by 2035

Keep value in the EU: A bold industrial policy



1

Drive a comprehensive strategy

Fix structural barriers:

favor cost reduction, ease regulation,
invest in critical tech

Safeguard volumes:

prevent competitiveness loss and
support domestic EV and electronics
production



2

Match competitors' policies

Support supply side:

aids for OPEX, CAPEX
+ FDI local development criteria

Boost demand side of 'Made in Europe' vehicles:

incentives tied to local content
thresholds



3

Apply best practices

Combine measures:

competitiveness-enhancing
+ supportive tools

Stay flexible:

preserve innovation & adapt to global
trade dynamics



Restore the competitiveness of the EU automotive manufacturing footprint and prevent value transfer outside Europe.