

Europe

Recommendations for the 2024 European Elections

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Table of Contents

Foreword by VDA President Hildegard Müller	3
1 Strengthen the EU's economic and industrial location in global competition	5
1.1 Deepen and complete the single market	5
1.2 Strengthen Europe as an industrial location	5
1.3 Alleviate the burden on medium-sized automotive companies	6
2 Promote free and fair trade	7
2.1 Conclude trade agreements and expand global partnerships	7
2.2 For a prudent alignment in relations with China	7
2.3 Ensure global access to raw materials and energy sources	8
3 Create conditions for the implementation of the green transformation	9
3.1 Expand charging and H ₂ refuelling infrastructure across the EU and focus on reviews	9
3.2 Leverage the potential of all technologies to promote sustainable mobility	9
3.3 Sustainability throughout the product cycle	10
4 Overcome the backlog in the digitalisation of the internal market	11
4.1 Set the course for automated and connected vehicles	11
4.2 Advance digital solutions for Europe	11
4.3 Create a legally compliant, innovative framework for AI in industry	12
5 Ensure transformation with financing, future technologies and talent	13
5.1 Promote transformation financing	13
5.2 Strengthen Europe as a location for semiconductors and batteries	13
5.3 Address the skills shortage	14

Foreword by VDA President Hildegard Müller

Dear Ladies and Gentlemen,
dear readers,

'united in diversity' – rarely has it been more important than today, as we approach the 2024 European elections, to remember the European motto. The European Union has brought us all who live on this continent closer together. It has brought many benefits to all Europeans: freedom of movement, consumer protection, a large internal market, political and economic stability. Above all, Europe means one thing: peace. These achievements are a firm foundation for our prosperity. Therefore, the importance of the 2024 European elections cannot be overestimated.

A lot depends on the European Parliament elections in June. They will significantly shape the future of the EU. In which direction will Europe develop? Will Europe remain a hub for innovation or will it fall further behind other international locations in terms of competitiveness? Does Europe continue to stand for joint solutions and cooperation? How will future growth be enabled? Will our continent remain open to the world? Clear answers are needed to these and other questions.

The European automotive industry employs around 2.4 million people, with 13 million jobs in Europe depending on the automotive sector. It is a European industry that competes with other regions. It is fully committed to the climate-neutral mobility of the future and is investing large sums. For its part, the EU must set the course to ensure that industry can continue to make its important contribution to employment, growth, prosperity and thus also to climate protection in the future. To achieve this, Europe must once again become more competitive internationally as an industrial centre. Energy prices are too high, as are corporate taxes, and there are significant bureaucratic hurdles. This applies, for example, to complex reporting and information obligations, which particularly burden the industrial SME sector. Another area of work is international cooperation via free trade agreements as well as energy and raw materials partnerships, where Europe is also not making progress fast enough. There is also room for improvement when it comes to the prerequisites for key future technologies such as electromobility and autonomous driving. There is a significant amount of work to be done in terms of charging infrastructure and digital infrastructure. We aim to realise the goals that Europe set itself in the last legislative period. In this manifesto, you will find further examples of this.

It is true that the EU needs reforms in some areas and that there is much to be done with regard to the political framework. However, this must not mean that the EU itself is called into question – although populists do so time and again. They try to capitalise on people's insecurity and fear of the future for their own purposes. They insist that the EU can no longer be reformed. But this is not a viable concept for Europe's future. The populists' solutions and policies threaten not only Europe's democratic but also its economic foundation. We must take a proactive approach to the substantive debate with populists and show the citizens of Europe that we all benefit from the EU.

We now need solution-oriented policies that radiate security. People's worries and fears must be taken seriously. It is therefore crucial that the new EU Parliament and the new Commission focus on industrial policy. After all, it is the basis for employment, growth and prosperity in Europe and has been neglected for far too long. We need a clear plan for the future of our continent that reconciles climate protection and industrial policy. We provide concrete proposals for this in this manifesto.

The EU has brought many benefits to our continent, including to the German automotive industry. However, reforms are now necessary for the EU to regain international relevance, fulfil its promise of freedom and prosperity and remain competitive. This should also be the guiding principle for the 2024 European elections and for the next legislative period. Let's develop the EU together and make it fit for the future.

I hope you enjoy reading this manifesto!

Yours sincerely,



Hildegard Müller



1 Strengthen the EU's economic and industrial location in global competition

A strong single market, internationally competitive location factors and modern infrastructure are essential for a competitive Europe. The automotive industry is a key leading industry in Germany and Europe and plays a decisive role in individual mobility, public transport, freight transport and logistics.

1.1 Deepen and complete the single market

The European Union faces global competition and must strengthen its position in order to remain an attractive location for companies, secure jobs and promote prosperity.

The single market is crucial for the international success of the automotive industry, provides easy access to sales markets and secures competitive advantages. The further deepening and completion of the single market is therefore an essential step for the preservation and strengthening of the European Union and its economy.

Urgent reforms are needed to facilitate cross-border business and harmonise national systems. The harmonisation of standards promotes legal certainty and consumer confidence. Furthermore, it is of paramount importance to implement measures that will reinforce the euro, facilitate the further development of the economic and monetary union, advance the common energy policy and complete the banking and capital market union.

1.2 Strengthen Europe as an industrial location

The European industrial location is currently facing a number of challenges, both external and internal. The latter manifest themselves in a high density of regulation, extensive documentation and reporting obligations, lengthy authorisation and coordination procedures and the associated high bureaucratic hurdles.

The most effective climate protection strategies are those that are developed in collaboration with industry. The EU should not only aspire to achieve the most ambitious climate targets, but also the most ambitious growth targets. The companies in the German automotive industry are driving the goal of climate-neutral mobility with high levels of investment and innovation. The right framework conditions must be created to ensure that these investments are also made in Europe.

The European Commission should once again dare to set an ambitious growth target – just as there is a target for climate protection. The definition of such a target creates a sense of commitment that drives action and raises public and political awareness of the need to strengthen European industry. In addition, the weaknesses of Europe as an industrial location must be countered by increasing the energy supply, making energy prices more competitive and facilitate greater flexibility in the electricity system. The VDA is in favour of extending the existing aid framework (TCTF) until 2030 in order to accommodate the ongoing ramp-up of transformation technologies. In addition, the Green Deal Industrial Plan (GDIP) and the TCTF should be extended to digital transformation technologies, as the green and digital dimensions are intertwined, and therefore require a combined approach.

1.3 Alleviate the burden on medium-sized automotive companies

Increasing bureaucracy and extensive reporting obligations are placing a considerable burden on medium-sized automotive companies. Companies are faced with time losses and high costs due to numerous new and complex reporting and information obligations. This complex interaction hinders investment and growth, especially for small and medium-sized companies, which are often particularly burdened. The feasibility of new regulations is not taken into account, especially for SMEs.

Suppliers are facing what is probably their greatest business challenge: the green and digital transformation. As the electromobility transition progresses, many companies are faced with the challenge of developing a new business model while continuing to manufacture components for combustion engines. The transformation is further complicated by increasingly difficult access to financing for medium-sized suppliers. It is, however, precisely these companies that want to invest in the transformation that need access to capital and funding programmes. Adjustments in state aid law are also necessary in this regard.

The automotive SME sector, with around 270,000 employees in Germany alone, is renowned for innovative strength and diversity. Targeted framework conditions are needed to strengthen the automotive industry in all its facets. Cooperation with the EU is crucial to strengthen the competitiveness of the location. Regulatory hurdles need to be removed and innovation encouraged at both European and national levels. A more intensive dialogue between industry and politics is needed in order to develop practical solutions and remove obstacles. The German automotive industry expects European policymakers to reduce existing burdens rather than introducing new ones.

2 Promote free and fair trade

On the international stage, the EU should clearly advocate for open markets. The EU needs an active agenda for free and fair trade – based on bilateral, plurilateral or multilateral frameworks. The German automotive industry expects more a more pragmatic approach from the European Commission in the negotiations of free trade and investment agreements. A dense network of agreements is essential for maintaining economic strength and prosperity, diversifying supply chains, securing raw material and energy supplies, and reducing strategic dependencies. Only a strong and export-capable industry will be able to navigate the significant challenges brought about by the green and digital transformation.

2.1 Conclude trade agreements and expand global partnerships

The automotive industry in Germany and Europe depends on good access to foreign markets. Both vehicle manufacturers and suppliers export more than three quarters of their production. The revenues generated from this make a significant contribution to financing the transformation in Germany and Europe.

The pandemic and geopolitical crises show again and again how vulnerable value chains are and that they must become more resilient. The best insurance to strengthen resilience is to create alternatives. To strengthen Germany and Europe as a production location and continue to guarantee the associated jobs and prosperity, the EU must actively promote a WTO-compliant level playing field, free and fair trade and the dismantling of trade barriers worldwide. Ultimately, only an economically strong Europe can also act as a global player and promote European interests and values.

In light of the current global trend towards protectionism, the EU is increasingly reliant on free trade agreements. The successful conclusion of new trade and investment agreements is essential for the diversification of supplier relations. Negotiations on free trade agreements that are already underway should be concluded as soon as possible, with new negotiations initiated and existing relations with third countries, such as the United States, being reinforced. In particular, the agreements with Mercosur, India, Mexico and the ASEAN countries are of great macroeconomic and strategic importance. At EU level, against the backdrop of changing framework conditions, negotiations require pragmatic approaches and greater flexibility that accounts for the specific interests of trading partners. As part of the European strategy for economic security, it is essential to reinforce the 'Partnering' pillar and to ensure that the 'Protect' pillar is not the sole focus.

2.2 For a prudent alignment in relations with China

Economic cooperation between China and the EU offers opportunities for both sides today and in the future – despite all current challenges and systemic differences.

China is an important sales, production and innovation location for the German automotive industry and plays a pivotal role in a successful transition to a green and digital economy. Cooperation has advantages for investment, innovation and employment in China as well as in the EU. In view of the global challenges, critical and constructive cooperation and dialogue remain indispensable. The de-risking approach pursued by the Commission should be

carried out with a sense of proportion, guided by the principle ‘as autonomous as necessary and as open, global and market-oriented as possible’.

In order to ensure a level playing field, the EU should endeavour to further reduce barriers to market access for foreign companies in China. An active industrial strategy and trade policy should also be prioritised in order to strengthen the competitiveness of European locations and promote diversification. The Commission’s anti-subsidy investigation into electric vehicles from China cannot solve these challenges and does nothing to strengthen the competitiveness of the European automotive industry. Rather, the aim is to overcome existing challenges through dialogue and to pursue partnership-based formats and solutions.

2.3 Ensure global access to raw materials and energy sources

The ramp-up of electromobility and the increasing use of digital solutions have led to a significant increase in the raw material requirements of the economy. Ensuring a secure, diversified and sustainable supply of critical and strategic raw materials and energy for industry is an important contribution to achieving Europe’s climate goals and is essential to safeguarding freedom, security and prosperity.

In the context of the market acceleration towards electromobility, European industry is heavily dependent on imports for raw materials. The supply markets for strategic raw materials in particular are concentrated in just a few countries. The diversification of raw material supply chains can only succeed if new options are opened up. To achieve this, it is essential to engage in close cooperation, especially with countries in Africa, South America, the Pacific region and the United States.

The implementation of the Critical Raw Materials Act (CRMA) urgently requires urgent improvement in terms of support measures in order to attract investment in raw materials projects, from mining to processing and recycling, for companies based in the EU. The VDA therefore recommends the creation of a European raw materials fund and a European raw materials agency to facilitate the development of strategic projects.

3 Create conditions for the implementation of the green transformation

The German automotive industry is committed to the goal of climate neutrality. At the same time, industrial policy must ensure that the CO₂ reduction targets are in line with strengthening the competitiveness of companies. This includes, above all, energy costs. Only a green transformation that preserves the industrial base and thus the prosperity of citizens is a successful transformation and has the chance of being imitated around the world.

3.1 Expand charging and H₂ refuelling infrastructure across the EU and focus on reviews

With the CO₂ fleet regulation, ambitious targets for the transformation of road transport towards climate neutrality have been set. Over the next five years, it is crucial to create the necessary conditions for this transformation. A major challenge for the ramp-up of electromobility lies in the inadequate charging and H₂ refuelling infrastructure in Europe. In order to be able to utilise the large number of electric vehicles available, the charging infrastructure and the necessary electricity grids need to be expanded in advance.

The Alternative Fuels Infrastructure Regulation (AFIR) adopted in 2023 is the key regulatory lever for the expansion of the charging and H₂ refuelling infrastructure. However, the expansion targets set therein neither correspond to the necessary requirements for passenger cars nor for commercial vehicles. The AFIR review must therefore be used to consistently adjust the ambition level for passenger cars and heavy commercial vehicles to the ambitious targets of the two fleet regulations.

Furthermore, the review of the CO₂ fleet regulation for passenger cars and light commercial vehicles in 2026 is of great importance. This review should primarily focus on progress in the expansion of the charging infrastructure and other supporting framework conditions. However, it should also allow for adjustments to be made to key parameters of fleet regulation. This is because the 0g target for 2035 in particular remains extremely ambitious and is heavily dependent on the framework conditions, such as the charging infrastructure, but also other parameters, from the development of the price of charging electricity to the supply of raw materials and semiconductors as well as industrial policy stimuli.

3.2 Leverage the potential of all technologies to promote sustainable mobility

The next few years will see a continued focus on the ramp-up of electromobility as a key element in successfully shaping the transformation. However, in order to achieve the climate targets, it is essential to fully utilise the potential of all technologies. This requires an approach that is open to technology: the expansion of electromobility is not synonymous with the complete replacement of combustion engines on the roads. There are 280 million vehicles with combustion engines on European roads, and around 1.6 billion worldwide.

The use of renewable fuels can play a pivotal role in the decarbonisation of the existing fleet and the achievement of the climate targets in the transport sector. They can be produced synthetically from renewable electricity or from biogenic sources and blended with fossil fuels until they are available in pure form in the future. The focus should not be exclusively on e-

fuels but should take into account the possibilities of renewable fuels in the Renewable Energy Directive (RED III). While e-fuels will not be able to play a relevant role in large quantities before the beginning of the 2030s, biofuels are already available and can be blended today. In heavy goods transport, hydrogen can also expand the variety of technologies.

In terms of regulation, a long-term framework beyond 2030 must be created – as has already been adopted for air and sea transport – to ensure investment security. In addition, the European Commission is called upon to develop a legally secure and technically feasible framework for the planned ‘carbon neutral fuels’ vehicle category.

In the long term, the European Emissions Trading System (ETS) should be further developed into the European Union's lead instrument for climate policy. The introduction of ETS-2 for road transport and heating from 2027 represents a significant milestone in this regard. This supports the market acceleration of electromobility while providing effective incentives to bring renewable fuels, such as electricity-based e-fuels, to the market. The next step should be to adopt a binding roadmap for merging ETS-1 and ETS-2 in order to move the entire value chain towards climate neutrality with a cross-sector and Europe-wide standardised CO₂ price signal.

3.3 Sustainability throughout the product cycle

The strategy of the German automotive industry to reduce the carbon footprint extends beyond the vehicle use phase to encompass the entire life cycle. The automotive industry's 'Design for Sustainability' strategies reflect a holistic view of all stages of the value chain and their environmental impact.

This does not work without the use of chemicals. For example, perfluorinated and polyfluorinated alkyl substances (PFAS) are irreplaceable in the automotive industry for electric vehicles. A far-reaching restriction, as currently proposed for traction batteries, for example, would undermine all efforts by the automotive industry to reduce CO₂ emissions in the mobility system. The VDA is therefore in favour of a differentiated and risk-based approach to PFAS. Traction batteries do not pose a risk and should therefore be excluded from the restriction project.

The revision of the End-of-Life Vehicles Directive is also currently setting the course for greater sustainability at the end of the life cycle. To facilitate the further development of the automotive circular economy, it is essential to understand the traction battery as part of the vehicle and to integrate it into the automotive circular economy. At the end of their service life, electric vehicles with traction batteries must be returned to environmentally certified collection centres.

4 Overcome the backlog in the digitalisation of the internal market

The digital transformation presents both opportunities and challenges for the automotive industry. Proactively shaping this change is crucial to fully exploit the potential of digitisation and to protect the interests of consumers. The primary objective is to enhance vehicle safety, which also encompasses cyber security. To achieve this, a risk-based approach is necessary, rather than the imposition of bureaucratic requirements. In general, the increasing complexity of the regulatory landscape poses a challenge, especially through new horizontal regulations. A coordinated approach by the EU institutions and stakeholders is crucial to secure the leading position of the German and European automotive industry in the digital future.

4.1 Set the course for automated and connected vehicles

The introduction of autonomous and connected vehicle technologies in the German automotive industry is internationally pioneering and contributes to making transport safer, cleaner, more efficient and more inclusive. However, following the creation of a legal framework for small series production, the major challenge now is to develop viable business models in large quantities on this basis.

The automotive industry is already very active in helping to extend the legal framework to large-scale production. In addition to the legal framework and its scalability, a streamlined authorisation process in the member states is also necessary from the companies' point of view to ensure that the innovative vehicles and systems actually make it onto the road. Globally, cooperation at UNECE level and technical standardisation are key success factors. To encourage transport companies to purchase and connect rural areas, it is necessary to provide them with locally targeted incentives. This will help to offset the initial cost disadvantages and entrepreneurial risk involved.

It therefore requires an extension of the legal framework to large-scale production, a streamlined approval process and a targeted funding policy in order to position Europe as an attractive market. An EU-wide, harmonised approach is necessary at this point. However, the coming legislative period should also be used to increase public acceptance of autonomous driving through positive communication.

4.2 Advance digital solutions for Europe

There is a growing customer interest in a wide range of data-based value-added services, presenting an opportunity for Europe to build a thriving data ecosystem around the vehicle. This requires safe and transparent standards that not only ensure the functionality and compliance of the vehicles, but also protect the safety and privacy of customers. Increasing software complexity in vehicles, especially in the context of cloud-based services, poses a significant challenge. An open software ecosystem is necessary to manage software complexity and strengthen competitiveness.

Building such a data ecosystem requires innovative approaches such as the VDA ADAXO concept. This platform provides a secure technical option for secure access to vehicle data and functions. The development of secure and transparent standards for accessing these data and functions is crucial to ensure the protection of customers and to strengthen the

competitiveness of the German automotive industry. It is important that the ADAXO concept is supported as a pioneering approach for Europe.

In addition, the European Commission should actively promote the development of an open software ecosystem by supporting publicly funded projects and driving innovative solutions. This will enable the German automotive industry to play a leading role in shaping safe and innovative standards for the future of mobility.

4.3 Create a legally compliant, innovative framework for AI in industry

The upcoming legislative period requires the strategic promotion of the integration of artificial intelligence (AI) in industry, with a particular focus on the automotive sector. A legally secure and innovation-friendly legal framework is crucial here. AI is already being used today across the entire automotive value chain and, as a key technology, will also play a decisive role in shaping the mobility of tomorrow.

Following the EU's AI Act, it is important to not only burden the European AI ecosystem with regulatory projects but also to strengthen it through innovation promotion measures. Policies focused on innovation, education, research and international cooperation form the basis for the sustainable integration of AI in industry. The EU and the member states must now develop concepts on how the envisaged institutions can be quickly equipped with sufficient qualified personnel to monitor and comply with the provisions of the AI Act. The EU has the potential to become a global leader in artificial intelligence and should capitalise on this opportunity.

5 Ensure transformation with financing, future technologies and talent

The automotive industry is undergoing the biggest transformation in its history. The simultaneous transition from combustion engines to alternative drive systems, digitalisation and sustainable production represents a significant challenge. The need for investment is enormous, but higher interest rates and stricter lending requirements by banks increase financing costs. Semiconductors and batteries play a particularly important role in this transformation. High energy prices, excessive regulation, a shortage of skilled labour and increasing bureaucracy are just some of the stress factors for companies in the automotive industry.

5.1 Promote transformation financing

Medium-sized automotive suppliers in particular are faced with a number of new and major challenges that are leading to a decline in production figures and fluctuating costs. At the same time, the transition to green technologies and digitisation requires significant investments. Medium-sized companies cannot cover the necessary financial funds solely from ongoing business operations. They therefore rely on stable and reliable financing options, with banks and savings banks being the most important lenders. However, they are reluctant to approve financing applications from SME suppliers due to low economic growth, stricter regulatory requirements and rising interest rates on borrowed capital. Despite solvent customers and promising project profits, financing requests for such projects are increasingly being rejected. Structural policy measures are therefore required in the area of corporate financing in order to support the automotive industry's transition to environmental sustainability.

The German automotive industry therefore recommends regulatory relief for banks, particularly in connection with the Basel regulations. Further regulations, such as the Taxonomy Regulation and the Corporate Sustainability Reporting Directive (CSRD), impose additional reporting obligations for financiers and companies and offer the potential for streamlining bureaucratic processes. In order to maintain the competitiveness of the automotive industry in the future, it is essential that the adapted state aid framework for crisis management and shaping change is extended beyond 2025 – only in this way can a transformation to a 'net-zero economy' be achieved in the long term. Furthermore, platforms such as STEP (Strategic Technologies for Europe Platform) should be further expanded and strategic funding projects such as the IPCEI (Important Project of Common European Interest) should be accelerated.

5.2 Strengthen Europe as a location for semiconductors and batteries

Resilient supply chains are critical to successful transformation. This applies in particular to critical semiconductor and battery production. Batteries and semiconductors are of central importance for the digital and green transformation. The manufacturing, communications and transport industries, for example, are heavily reliant on the use of semiconductors. Demand for semiconductors in the automotive industry will triple by 2030. For the automotive industry, chips larger than 90 nanometres are of significant importance.

In order to counteract the threat of a sustained decline in production in Europe and make supply chains significantly more resilient, it is essential to promote additional production capacities in the automotive-relevant nodes in Europe in particular. The message is 'expansion,

expansion, expansion' along with a comprehensible concept using pragmatic authorisation procedures. The EU Chips Act is just the beginning. Europe must now invest in the production of automotive-relevant semiconductors and accelerate the production of large chips.

To support the development of local battery production in Germany and Europe, a competitive framework must be created within the EU. This should address key factors such as energy costs, subsidy programmes, bureaucratic obstacles and other relevant aspects, in comparison to the global environment. In the field of battery production, the transformation requires research and pilot projects of considerable scale. Collaboration or even mergers between companies in this context could therefore become more important and more frequent than they are today. It is therefore necessary to examine competition law to ascertain whether it permits such collaboration in a legally compliant manner.

5.3 Address the skills shortage

The shortage of qualified specialists and workers is a major obstacle to growth for the economies of almost all EU member states, despite the varying degrees of impact observed across individual countries to date. The challenges posed by the ecological and digital transformation are likely to be further compounded by the necessity for entirely new qualifications in many cases and the need for job profiles to be developed at an equally rapid pace.

Companies in the automotive industry compete with competitors from other sectors in Germany and abroad for many qualification profiles. There are numerous creative initiatives in companies, such as in-house academies or further training programmes. The automotive industry is taking a proactive approach to addressing the current challenges. However, accompanying political measures are also required. For example, the area of labour qualification is characterised by an obstructive bureaucratic jungle. There are also considerable obstacles to the free movement of labour. Companies in the automotive industry are particularly affected by this. They often have branches and customers in several European countries.

Improved framework conditions are therefore also needed at European level in various areas. European funding for further training measures should be geared more towards everyday company life for customised further training and qualification measures. The existing complex and fragmented funding landscape in the area of qualification should be simplified and expanded in line with demand while removing administrative hurdles. Simplifications are also required for the deployment of employees. Regulatory gaps at European level, such as a lack of harmonisation, are accompanied by additional national hurdles. These range from different reporting portals and uncoordinated digital procedures, as well as difficulties with minimum wage settlements with foreign partner companies. In an industry with an international focus such as the automotive industry, it is important that employees can also be deployed abroad at short notice. In addition, the immigration of skilled workers from third countries remains a decisive factor in meeting the demand for skilled workers, which should continue to be accompanied by international agreements.

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The German Association of the Automotive Industry (VDA) brings together more than 650 manufacturers and suppliers under one roof. Our members design and produce cars and trucks, software, trailers, bodies, buses, parts and accessories, as well as new mobility offerings.

We represent the interests of the automotive industry and stand for modern, future-oriented multimodal mobility on the path to climate neutrality. The VDA represents the interests of its members vis-à-vis politics, the media and social groups.

We focus our efforts on electromobility, climate-neutral drives, the implementation of climate targets, raw material security, digitisation and networking as well as German engineering. We are committed to a competitive economic and innovation hub. Our industry ensures prosperity in Germany: More than 780,000 people are employed directly in the German automotive industry.

The VDA is the organiser of IAA MOBILITY, the largest international mobility platform, and IAA TRANSPORTATION, the world's most important platform for the future of the commercial vehicle industry.

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