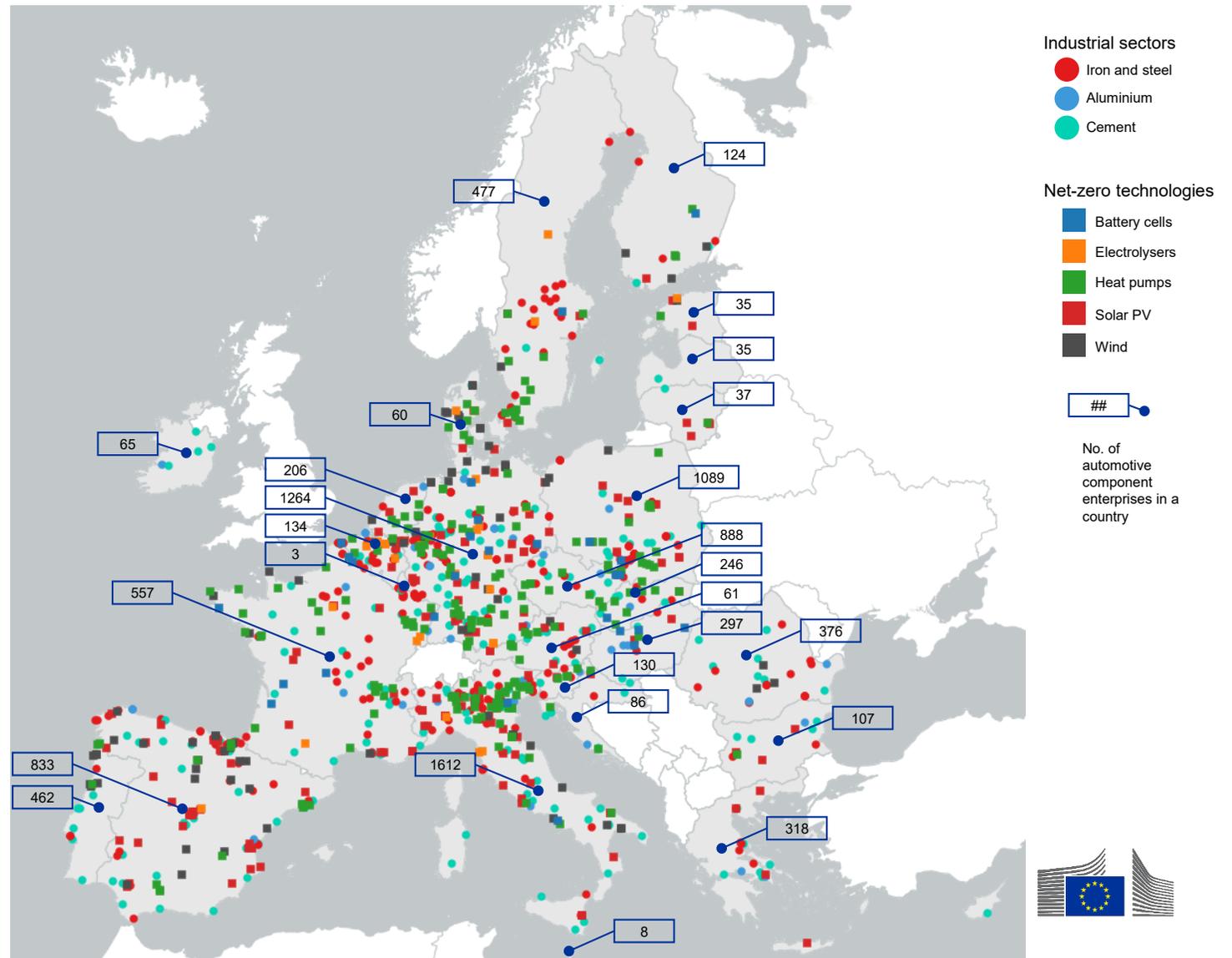


Industrial Accelerator Act

4 March 2026



EIs, net-zero technologies and automotive components production sites in the EU



Source: JRC - [Energy and Industry Geography Lab \(EIGL\)](#) 2026 for EIs, Internal EC - [Net-Zero Technologies \(NZE\) Monitoring Dashboard](#) for net-zero technologies, BloombergNEF for battery cells, Eurostat 2023 for automotive components.

Note: Eurostat data on the automotive component sector is based on NACE code C293 (Manufacture of parts and accessories for motor vehicles). Data on Cyprus is undisclosed due to confidentiality.

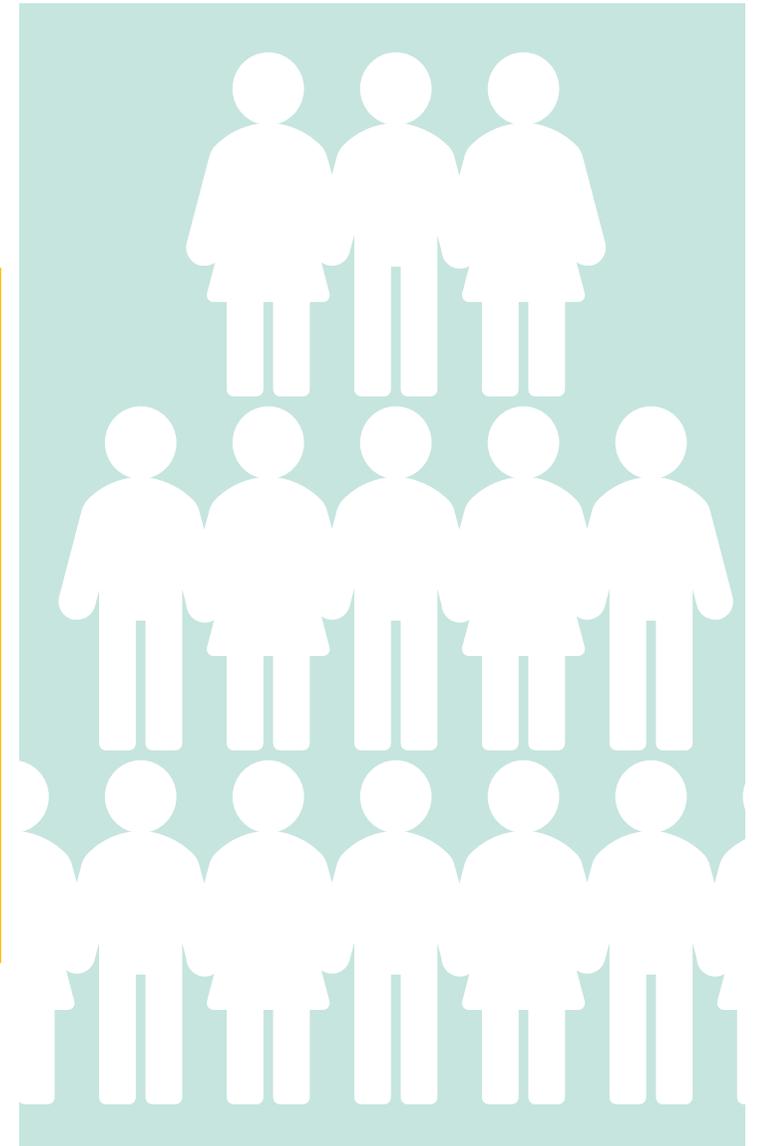


Jobs

The Industrial Accelerator Act is expected to stop and reverse the negative trend in the automotive sector. If trends were to continue, up to **600 000 jobs** will be lost by the sector in the next 5-10 years.

Moreover, the Industrial Accelerator Act could help **preserve and/or create around 150 000 jobs in other sectors:**

- Secure the 85 000 jobs expected under the current pipeline of battery projects.
- Create 58 852 for the solar manufacturing industry.
- Preserve up to 4500 jobs for the steel industry from the low-carbon measures.



Industrial Accelerator Act

Context: EU *dependent* and production in *decline*



Share of manufacturing in total **GDP has declined from 17.4% to 14.3%** between 2000 and 2024 in the EU



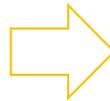
Since 2019, **production volumes** in EII have **declined by almost 20%**



EU **dependency on China** has increased by a **factor of 4.2 for EVs**, compared to conventional ICE vehicles



Around **50% of batteries** used in the EU are imported from China; **94% of solar PV modules** and cells, and around **50% of inverters** are sourced from China.



Objective: *Targeted* and *transitional*

Targeted and transitional measures: strategic sectors in IAA account for ~15% of EU manufacturing production.

Strengthen the EU's long-term economic resilience, prosperity and strategic autonomy



Leverage the Single Market to boost demand for European low-carbon products and technologies



Maximise the added value of foreign investment in the EU in the most strategic sectors



Deploy industrial projects at scale by streamlining permits, as well as facilitating the development of industrial clusters



Permitting and Acceleration areas

Objective	Streamline and gather low-hanging fruits of digitalisation	Creation of “go-to” industrial areas with different benefits to attract and facilitate investment
Sector	Industrial Manufacturing Sector	
Measures	<p><i>Permitting:</i></p> <ul style="list-style-type: none"> • Single Access Points, through European Business Wallet • “One project-one submission”: single permit-granting procedure 	<p><i>Industrial Acceleration areas:</i></p> <ul style="list-style-type: none"> • Creating industrial hubs that attract investment, facilitate decarbonisation, and strengthen supply chain resilience. • Mandatory Strategic Environmental Assessment, aggregated baseline permit + individual permit top ups to frontload burden prior to project arrival. • Tacit approval, public interest (RSEA toolbox) to provide speed and certainty to projects. • Better access to infrastructure: <ul style="list-style-type: none"> • energy needs shared with TSOs • Facilitating access to finance • skills
Objective	Streamline and speed up EIs’ transition	
Sector	Energy Intensive Industries	
Measures	<p><i>Permitting:</i></p> <ul style="list-style-type: none"> • Alignment with EIs under NZIA: SPOC, 12/18 months timelines • Tacit approval & public interest (RSEA toolbox) to provide speed and certainty to projects. 	



Foreign Investment conditions

Applies to:

- Investments **over EUR 100m** and from countries with **> 40%** global production

Sectors covered:

- Batteries
- EVs
- Solar PV
- Extraction, processing and recycling of critical raw materials.

Governance:

- Notification to MS
- COM may take over certain cases (e.g. > 1bn EUR investments)

4 out of 6 conditions to be met:

- ✓ **High quality jobs:** employment min 50% Union workers
- And, 3 out of following 5
- ✓ **Ownership:** Foreign investors no more 49% ownership;
 - ✓ **Cooperation and control:** Joint venture with one or more EU entities (max 49% foreign);
 - ✓ **Tech transfer:** Agreements about licensing, IP rights, access to know-how, etc.;
 - ✓ **Innovation spillovers:** 1% gross annual global revenue for R&D spending in the Union;
 - ✓ **Sourcing strategy:** 30% input products manufactured in the EU;



Lead markets: Low-carbon and Made in EU

Sectors	Steel, cement, aluminium, clean tech and vehicle components	
Mechanism	Public procurement, auctions & support schemes	Financial support for corporate vehicles & CO2 credits for <i>small EVs</i>
Geographical scope	EU + relevant international commitments - Non reciprocity/dependencies/exceptions	EU
Measures	<ul style="list-style-type: none"> • Low-Carbon Steel • Low-Carbon & MiEU Cement 	<ul style="list-style-type: none"> • Low-Carbon & MiEU Aluminium
	<ul style="list-style-type: none"> • MiEU Vehicles components <i>and</i> MiEU batteries for EVs 	<ul style="list-style-type: none"> • MiEU Vehicles components <i>and</i> MiEU batteries for EVs
	<ul style="list-style-type: none"> • BESS • Solar PV • Wind 	<ul style="list-style-type: none"> • Heat pumps • Nuclear • Electrolysers



MiEU and low carbon energy intensive industries

PUBLIC PROCUREMENT AND SUPPORT SCHEMES

January 2029

Aluminium

25 % MiEU and low-carbon

Cement

5 % MiEU and low-carbon

Steel

25% Low-carbon



In construction and automotive sectors



MiEU for net-zero tech

Public procurement	Public support schemes	Auctions	Manufacturing support
<p>Batteries (BESS):</p> <ul style="list-style-type: none"> - EIF +1: Final product & for projects > 1MWh, BMS - EIF +3: Final product + BMS + cells + 1 component 	<p>Wind:</p> <ul style="list-style-type: none"> - EIF +1: 1 component - EIF +3: 2 components 	<p>Nuclear:</p> <ul style="list-style-type: none"> - EIF +4: 2 components - EIF +6: 3 components 	
<p>Solar PV:</p> <p>EIF +3: Inverter + cells or equivalent</p> 	<p>Heat pumps:</p> <p>EIF +3: Final product</p> 	<p>Electrolysers:</p> <ul style="list-style-type: none"> - EIF +1: Final product + stack + 1 component - EIF +3: Final product + stack + 2 components 	



MiEU Vehicle components and batteries

	EIF + 6 months	EIF + 3 years
EVs	<ul style="list-style-type: none">Assembled in the EU3 battery components (among which cells) MiEU70% non-battery components MiEU	<ul style="list-style-type: none">Assembled in the EU5 battery components (among which cells, CAM & BMS) MiEU70% non-battery components MiEU (incl. 50% of e-powertrain components MiEU and 50% main electronic systems MiEU)
Small EVs	<ul style="list-style-type: none">Assembled in the EU3 battery components MiEU or 70% non-battery components MiEU	

MiEU: Made in EU/ EIF: Entry into force



Thank you



© European Union 2025

Unless otherwise noted the reuse of this presentation is authorised under the [CC BY 4.0](https://creativecommons.org/licenses/by/4.0/) license. For any use or reproduction of elements that are not owned by the EU, permission may need to be sought directly from the respective right holders.

