



European Commission



MOBILITY INDUSTRIAL ECOSYSTEM

The mobility ecosystem comprises the entire value chain of the automotive, waterborne, rail and bike industries. It is a key industrial ecosystem crucial to economic growth and jobs in Europe and is characterised by a high level of innovation and collaboration across sectors. The mobility ecosystem and its value chains are closely intertwined with the digital, electronics, energy intensive industries, and textile ecosystems. On the other hand, mobility plays a crucial role in agri-food, construction, defence and tourism ecosystems.

Today, the mobility ecosystem faces many pressures from the shift to green mobility and rising global competition. To maintain its leading global position and improve its resilience, the mobility ecosystem must transform to advance new green and digital technologies and services – from electric vehicles, shared transportation services to smart and autonomous vehicles and connected infrastructures. These promise to revolutionise mobility, empower individuals, boost economies, and protect the environment.

KEY FACTS AND FIGURES



AUTOMOTIVE

- **13 million jobs** or **7% of EU employment**
- **€1 trillion** contribution to EU GDP
- **21.6% of new passenger cars** in EU are **electric**, 22% hybrid



WATERBORNE

- **4.5 million jobs** in the entire EU waterborne value chain
- **€500 billion** contribution to EU GDP
- Accounts for **13.5% of EU transport** greenhouse gas (GHG) emissions



RAIL

- **2.3 million jobs** in the EU railway value chain
- **€143 billion** contribution to EU GDP
- **With 0.4%** of transport GHG emissions in EU, it is the greenest mass transportation mode



CYCLING

- **1.3 million jobs** generated by the EU cycling value chain
- **€21 billion** contribution to EU GDP
- **2 million tonnes** of GHG spared thanks to EU bike industry

KEY CHALLENGES



Greening mobility: Demands for more sustainable transport alternatives are increasing the pace in adopting new technologies like electric mobility and renewable fuels like hydrogen.



New tech and new players: Emerging technologies such as electric vehicles, autonomous mobility, and mobility-as-a-service platforms have disrupted traditional value chains, reshaping how people and goods move. New players such as innovative start-ups and technology giants have entered the scene.



New regulatory challenges: The diversity of transportation modes, as well as automated mobility, require new regulatory frameworks to address safety, job displacement and harmonisation and integration of different modes of transport.

MAKING MOBILITY GREENER, MORE DIGITAL AND MORE RESILIENT

The European Commission, together with stakeholders from the mobility ecosystem, published a Transition Pathway for Tourism in January 2024. This is a dynamic roadmap to support the green and digital transition of the mobility ecosystem, while improving its resilience. The plan addresses issues like sustainable competitiveness, robust regulation, modern infrastructure, skills development and investment funding, while also focusing on the social dimension, innovation and regional development. To make the transition pathway a reality, participating stakeholders are invited to propose a series of pledged actions, to be implemented with the Commission's support and cooperation.

SUPPORTING THE TRANSITION



PUTTING SAFETY FIRST

The EU Vehicle General Safety Regulation lays down mandatory safety features and technologies in cars to reduce the number of road accidents and fatalities. The rules also establish **the first legal framework for the approval of driverless and automated vehicles**. In particular, the Advanced Driver Assistance Systems are a steppingstone towards the development and deployment of fully automated vehicles, offering enhanced safety and convenience to driver.



REINFORCING SOVEREIGNTY OF EU MOBILITY INDUSTRY

The mobility ecosystem relies on a secure supply of different raw materials and technologies such as clean batteries or chips to build the next generation transport. The new Critical Raw Materials Act, Net-Zero Industry Act and Chips Act aim to improve the secure supply of these key inputs in Europe, differentiate our supply chains and boost production in Europe.





SECURING SKILLS FOR THE MOBILITY ECOSYSTEM

Stakeholders in the automotive sector, with the support of the European Commission, established the Automotive Skills Alliance to upskill 5% of the workforce each year. The Commission also supports similar stakeholder led initiatives in the rail and maritime industries, namely The Skill Training Alliance for the Future European Rail system (STAFFER) and Pact for Skills for Shipbuilding and Maritime Technology.



CREATING CONDITIONS FOR NEW INVESTMENTS

The Commission is facilitating investments to support the green and digital transition of the mobility sector through Important Projects of Common European Interest (IPCEIs) dedicated to batteries and hydrogen and targeted investments in infrastructure and mobility through the Recovery and Resilience Facility (RRF).



BUILDING NEW INFRASTRUCTURE NETWORKS THE MOBILITY ECOSYSTEM

The EU Alternative Fuels Infrastructure Regulation aims to establish an adequate network of charging stations, hydrogen refilling stations, and alternative fuels infrastructure for transport.



SPURRING RESEARCH AND INNOVATION

Spurring research and innovation Horizon Europe research partnerships drive advancements in zero-emission waterborne transport, rail, connected and automated vehicles.



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