



Stronger through collaboration

EACN Activity Report 2025

Mulhouse, January 2026



Bruno Grandjean

President

Cluster Manager at
Pôle Véhicule du Futur, France

Dear all,

2025 has been, again, a challenging year for the European Automotive Industry with, e.g., new US taxes on European vehicles, automotive parts and steel, new trade restrictions on raw earths and increasing electric vehicle imports from China, or supply chain disruptions especially for electronic components. At the same time, the automotive market only slightly increased and remained largely below pre-pandemic level, with full and plug-in hybrid electric vehicles gaining market shares. They now represent more than 25% of all new registrations¹, highlighting the ongoing transformation of the market and our ecosystem. All these facts as well as others result in an uncertain outlook for European automotive OEMs and suppliers.

On European level, 2025 has been characterised by the strategic dialogue at the beginning of the year that resulted in March in the 'Industrial Action Plan for the Future of the Automotive Industry'². The action plan and political discussions resulted in December 2025 in the presentation of the Automotive Package to support the sector's efforts in the transition to clean mobility³.

In 2025, EACN member clusters, again, supported companies facing these challenges. For the benefit of their members. EACN clusters

- animate their ecosystems,
- care about competitiveness, technologies, markets or skills,
- (co-)organise international and national events,
- engage in collaborative projects to offer accessible cascade funding opportunities,
- interact with European institutions,
- exchange with their peers in EACN.

As a network, EACN engaged on European level with a joint response to the Strategic Dialogue for the Future of the Automotive Industry, participation and interventions at the Clusters meet Regions events in Heilbronn (DE) and Rzeszów (PL), in a meeting of the Automotive Regions Alliance at the European Parliament in Strasbourg, or at the ECA Cluster Conference in Madrid, including an EACN Input Paper about clusters' expectations to the future Multiannual Financial Framework of the European Union.

In 2026, challenges will remain and clusters can continue proving their added value for their respective ecosystems as well as for the European automotive industry.

EACN will continue to support its member clusters and to organise interesting and valuable exchanges.

Yours,
Bruno Grandjean

¹ ACEA (23/12/2025) New car registrations: +1.4% in November 2025 year-to-date; battery-electric 16.9% market share. [ACEA Website](#), accessed 09/01/2026

² European Union (2025) Industrial Action Plan for the European automotive sector. [COM\(2025\)95 final](#)

³ European Commission (2025) For a clean and competitive automotive sector. [DG MOVE Website](#). Accessed 09/01/2025

The EACN Executive Board

The Executive Board met regularly every second month in January, March, May, July, September, and November, as well as two times in February for extraordinary meetings.

The first one, just after the General Assembly on 21 January 2025, served to elect the new (old) president for 2025 and 2026. Bruno Grandjean from Pôle Véhicule du Futur (France) accepted the presidency. Shortly after, a second ad-hoc meeting allowed finalising the Joint EACN response to the public consultation run by the European Commission within the Strategic Dialogue on the future of the Automotive Industry.

The regular meetings served to

- prepare the General Assembly 2025,
- evaluate the usefulness of potential physical EACN Cluster Survival Workshop, abandoned in favour of the Cluster Excellence Meetings,
- organise the 2025 key indicator survey,
- plan Cluster Excellence Meetings and EACN Coffee Breaks,
- launch cooperation discussions with the Automotive Regions Alliance (ARA),
- follow up communication issues,
- or discuss current topics.



Thomas Röhr
Secretary-General

Executive Board Members



Miguel Araújo
Secretary-General
Mobilov, Portugal



Paul Butler
CEO
North East Automotive Alliance Limited, UK



Libor Dobeš
Cluster Manager
autoklastr, Czech Republic



Veronika Erős
CEO, Cluster Manager
ZONE Cluster, Hungary



Łukasz Górecki
Director, Silesia Automotive & Advanced Manufacturing Cluster, Poland



Ryszard Jania
President
East Automotive Alliance, Poland



Josep Nadal
Cluster Manager
CIAC, Spain



Uwe Pfeil
Clustermanager
Cluster Mobility & Logistics, Germany



Lyubomir Stanislavov
CEO and Member of the Board
AC Bulgaria, Bulgaria



Alexandra Wolf
Senior project manager
TransformotiveDIALOG, Germany

Joining forces for a strong network

EACN Members at 31.12.2025

A strong community:

33 Members

17 Countries

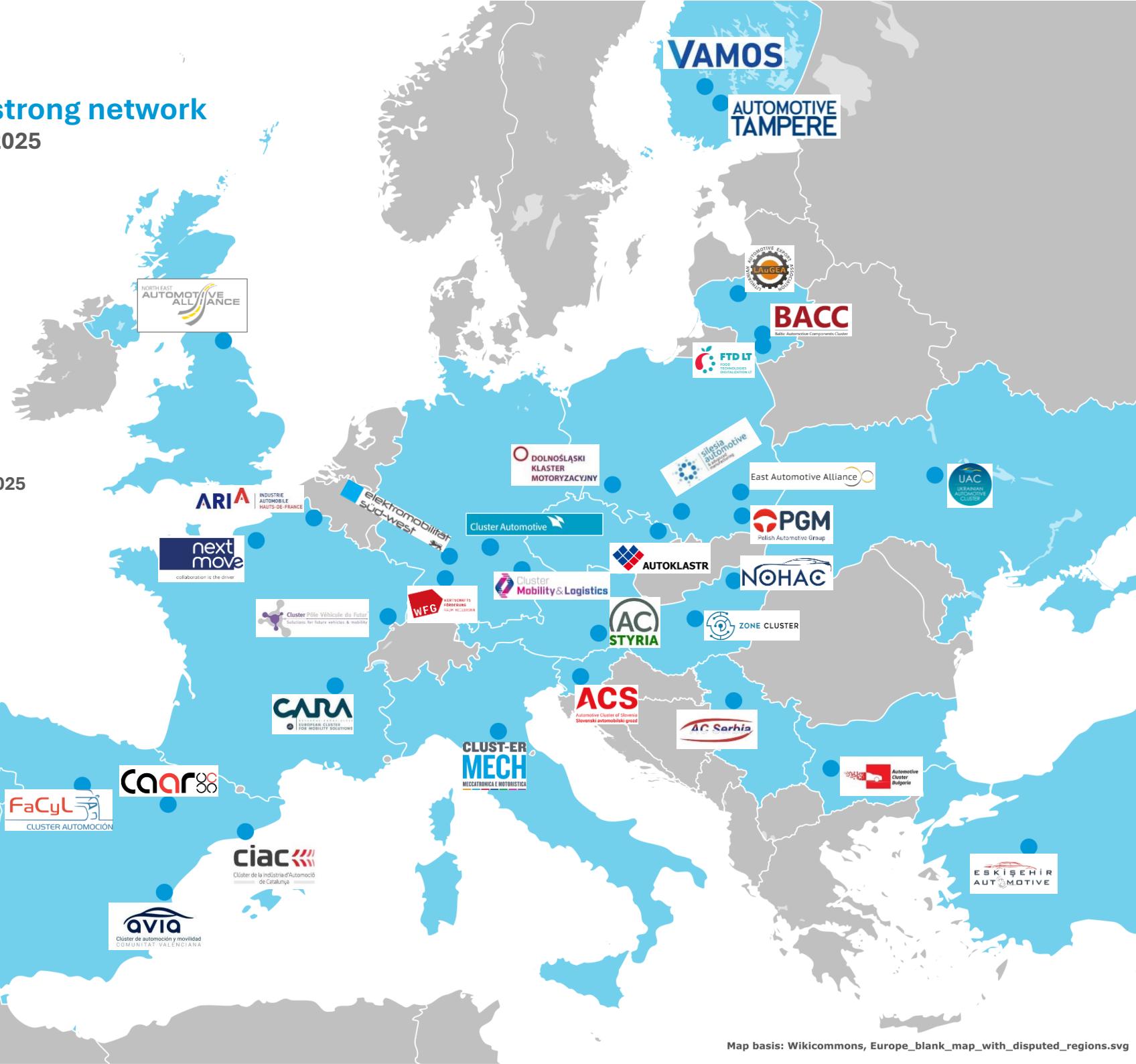
About 4.500

Clusters which joined EACN in 2025

- NOHAC (Hungary)
- FTD LT (Lithuanie)

Cluster who ended membership

- ID4Mobility (France)



Meeting our new members

North Hungarian Automotive Cluster (NOHAC)

NOHAC represents the community of automotive suppliers in the Northern Hungary region. Operating as an accredited cluster since 2014, NOHAC has around 70 companies mainly active in metal and plastic processing, design, engineering, and certification services. NOHAC's mission is to support innovation, knowledge sharing, and the development of supplier networks that connect regional SMEs more closely to European automotive manufacturers.



Tamás Csabai,
Cluster Manager

Food Technologies Digitalization Lithuania (FTD LT)



PhD Vaidas Liešionis,
Chairman of FTD LT

FTD LT gathers 18 members from Lithuania, Latvia, Denmark, Sweden, Finland, and Switzerland. The cluster drives innovation, sustainability and growth through cross-sectoral collaboration. The main goals are

- to increase the integration of digital technologies in the field of food engineering,
- to increase the production and export of digital technology products for the food industry, and
- to create preconditions for the development of human resources of the cluster members in the field of food engineering industry (digitization)

The link with automotive & transport mainly resides in the development and production of trailers for food transport. FTD LT joined EACN in September 2025 as first associated member.

Heterogeneous clusters with a common goal

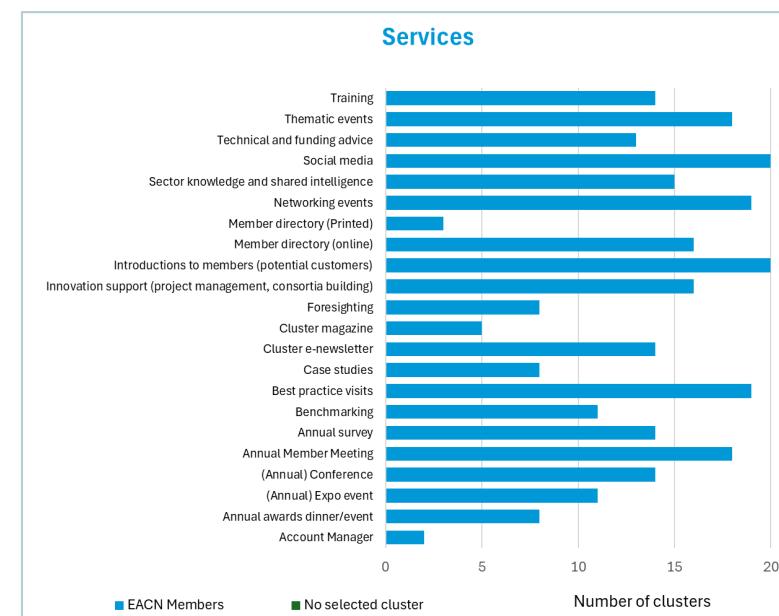
The key indicator survey conducted in 2025 underlines the manifoldness of the clusters that are members of EACN.

Clusters total between 24 and 495 members that are managed by teams of 1 to 20 full time equivalents (FTE), with a ratio of members/FTE ranging from about 10 to about 50.

Legal forms are varying from associations over companies to public services. Funding sources are also changing from one cluster to another. The main funding sources are membership fees, events training, commercial services, national and regional government fundings, and European funding, e.g. from projects [%].

Clusters offer many different services (see below), with some being generally integrated in the service portfolio, and others more individually.

Many clusters are also involved, as coordinator or partner, in their regional European Digital Innovation Hub (eDIH).



Radiating on European level

Bruno Grandjean, President, Thomas Röhr, Secretary General, and Executive Board members **represented the network at several European events:**

- Clusters meet Regions Heilbronn/Germany (8-10 April)
- Clusters meet Regions Rzeszów (Poland) (3-4 June)
- EU Clusters talks (19 February, 24 September)
- Automotive Regions Alliance Meetings in Strasbourg/Fance (17 June) and at the IAA Munich/Germany (10 September)
- Ukrainian Automotive and Mobility Forum in Lviv (17 November)
- ECA Cluster Conference in Madrid/Spain (9-11 December)



Clusters meet Regions Rzeszów: Alexander Grabski, Kinga Szczepaniak (EAA), Thomas Röhr (EACN), Bartosz Mielecke (PGM), Ryszard Jania (EAA) and Patrick Dufour (Transformotive) with the 'EAA car' made only with parts produced by EAA companies



EACN members at Clusters meet Regions Heilbronn: Adam Priechodsky (Autoklastr), Alexandra Wolff (Transformotive), Thomas Röhr (EACN), Aleksandar Šaranac, Anna and Igor Vijatov (AC Serbia)



EACN President Bruno Grandjean in Strasbourg at the Automotive Regions Alliance conference



Łukasz Górecki (SA&AM), Thomas Röhr (EACN), Josep Nadal and Elina Melik-Stepanyan (CIAC), and Patricia Solá (CEAGA) at the ECA Conference Madrid

Ensuring access to information

EACN Communication focusses on the bi-monthly EACN Newsletter, the website and the EACN LinkedIn profile.

Six newsletters have been published in 2025; they are accessible in the Information section of the EACN Website. The newsletters are a source of information about past and future events, projects activities, meetings or open calls, cluster birthdays, awards to clusters, other collaboration and other topics.

The EACN LinkedIn profile serves to share news and project information from EACN member clusters with a broader public. The profile gathers now 750 followers, a plus of 100 followers in the past 12 months.



Boosting cluster excellence through synergies

EACN aims at boosting cluster excellence through discussions, exchanges, good practices or joint activities.

In 2025, EACN started its series of Cluster Excellence Meetings for cluster managers where high performing clusters present and discuss how they are doing. Participants gain interesting and valuable insights. The first Cluster Excellence Meetings addressed

- ▲ **Commercial services, with presentations from GIZ ACS (Slovenia) and CAAR (Spain)**
- ▲ **EU Projects, with presentations from Mabinov (Portugal), Transformative (Germany)**
- ▲ **Events (co-)organised by clusters, with presentations from ZONE Cluster (Hungary), AC Serbia (Serbia) and NEAA (United Kingdom)**
- ▲ **EACN Input paper to the ECA Cluster Conference in Madrid**

EACN also organised three EACN Coffee Breaks, open to all staff from EACN members, on the following topics

- ▲ **EU Action Plan for the future of the Automotive Industry. Impact on Clusters.**
- ▲ **Impact of (erratic) US trade decisions on the European.**
- ▲ **Automotive Industry. A great thank to our guest speaker, Marc NICKLAS, Head of Unit Mobility at DG GROW/European Commission**
- ▲ **IAA Mobility 2025, Munich: "It's All About Mobility". Feedback and impacts.**
- ▲ **Transition Pathways for the Mobility Ecosystem: What's happening.**

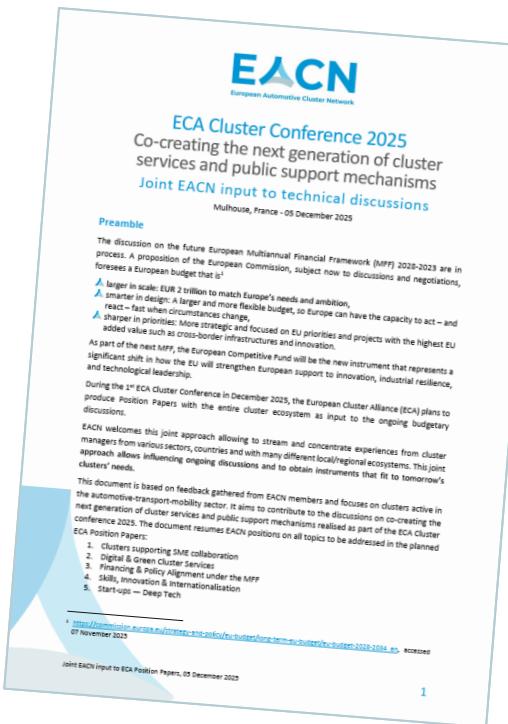
Working together for European answers

Joint EACN response to the Strategic Dialogue on the Future of the Automotive Industry

In January, EACN synthesised feedback from across Europe into a joint response to public consultation launched by the European Commission as part of the Strategic Dialog process.

EACN members recommended the integration of all five suggested topics: Innovation and leadership in future technologies and capabilities, Clean transition and decarbonisation, Competitiveness and resilience, Trade relations and “international level playing field”, and Regulatory streamlining and process optimisation. In addition, EACN members proposed direct input to the action plan, highlighting, e.g., the importance to stop the decline of the European supplier network as backbone of the automotive

industry, to create incentives to boost sales of vehicles with local European content, or to strengthen re- and upskilling of the workforce. The full document can be found [here](#).



Joint EACN Input to ECA position papers on cluster policies in the next MFF

In December, the European Cluster Alliance (ECA) organised its first [ECA Cluster Conference](#) in Madrid. This bi-annual conference aims at gathering the European cluster community and members from the European Commission to discuss cluster policies.

EACN's Secretary General Thomas Röhr had been invited to participate in the elaboration of an ECA Position Paper as input to the ongoing discussions on the future Multiannual Financial Framework (MFF) and to join the round table on 'Industrial Transition Pathways & instruments'.

The joint EACN Input document can be found [here](#).

Simplifying access to EU funding for SMEs

Access to European co-funding is very competitive, and especially SMEs do not have the necessary time, financial resources or expertise, and the time from application to final results is often much too long.

Financial Support to Third Parties (cascade funding) are part of projects where clusters can apply to funding that is then redistributed via simplified OpenCalls to SMEs. This is therefore a very important instruments for clusters, and EACN members are very successful in acquiring such projects.

In 2025, EACN clusters organised several OpenCalls within the following projects:

- [greenSME](#) (Horizon Europe funding – SA&AM/PL)
- [SCAIRA](#) (Interreg SUDOE – CIAC/ES, Mabinov/PT)
- [E-Boost](#) (Euroclusters – CAAR/ES, CARA/FR)
- [RESIST](#) (Euroclusters – PVF/FR, CEAGA/ES, Autoklastr/CZ)

They also successfully applied for new cascade funding. EACN members assured European co-funding for two new Eurocluster projects, Resist II and JEWEL, and for two Interregional Innovation Investment (I3) Instruments, IH-MIE and bridge&shift.



**Co-funded by
the European Union**

Resist II – REsilience through Sustainable processes and production for the European automotive InduSTry (Eurocluster)



EACN Consortium partners are CEAGA (Coordinator, ES), Pôle Véhicule du Futur (FR), autoklastr (CZ), Polish Automotive Group (PL), and the Ukrainian Automotive and Mobility Cluster (UA), the cascade funding budget is about €1,6M. [Project website](#).

JEWEL – Joint nEtWork for European net-zero manufacturing Leadership (Eurocluster)



Joint nEtWork for European net-zero manufacturing Leadership

EACN Consortium partner is Clust-ER Meccatronica e Motoristica (IT), the project mobilises nearly €2M in cascade funding. [Project website](#).

IH-MIE – Interregional Hydrogen Mobility Initiative for Europe (I3)



EACN Consortium partners are Autoklastr (CZ), CEAGA (ES), Mabinov (PT) and NextMove (FR). The cascade funding budget is approx. €2M. [Project website](#).

Bridge & Shift – Bridge the Gap & Shift to Progress (I3)



The project brings together EACN members CAAR (ES), Transformotive (DE), autoklastr (coordinator, CZ) and East Automotive Alliance (PL). Project budget is €1,4M.

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Mulhouse, January 2026

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