

EUROPEAN BUS MANUFACTURERS

A strong bus industry for a resilient and competitive Europe

Open letter

8 June 2026

Independent European bus manufacturers – key drivers for innovation and prosperity in Europe – need level playing field to defend against unfair competition

Dear President of the European Commission,
Dear Commissioners,
Dear EU and EFTA leaders,

The European bus manufacturing industry comprises numerous small, medium-sized and large companies across the EU and EFTA countries, including long-established independent businesses, often in family ownership. A strong manufacturing sector is a prerequisite to achieve European strategic objectives and to ensure a resilient, competitive, and sustainable Europe.

We, the undersigned, represent independent bus manufacturers and are calling on the European Commission to **ensure a level playing field for our sector** against third-country competition which is threatening expertise, innovation, and highly skilled jobs at European bus and coach manufacturers.

Over the past decade, EU countries, regions and cities have become global leaders in the implementation of zero-emission technologies for passenger transport, including battery-electric, hydrogen and trolley buses. This progress has been made possible by ambitious European goals, regulatory measures such as the Clean Vehicles Directive, and EU financial support instruments.

By the end of 2025, over 60% of newly-registered city buses in EU and EFTA countries were zero-emission. While these buses were originally primarily produced by European companies with research and development centres, manufacturing facilities, and all operations within EU borders, for some time now the **presence of non-European and especially Chinese competitors has been growing**. Their market share has increased rapidly to over 30%^[1] and is feared to grow further.

These companies offer products fully developed and manufactured outside the EU and EFTA area whilst participating in European funded public tenders. There has been ongoing **concern that European taxpayers' money is transferred outside the Europe** and is lost to the European economic ecosystem. At the same time, these companies benefit from state export subsidy in their home country, allowing them to undercut European manufacturers' prices and creating a severely tilted playing field.

Similar trends are starting to emerge in the intercity bus, long-distance and touring coach sectors, where newly-introduced low and zero-emission requirements will affect manufacturers in the same way.

As a result, the **European bus and coach manufacturing industry is facing challenges in maintaining its competitiveness** and is losing vital orders needed to underpin European innovation and manufacturing

excellence. Export opportunities are collapsing too. The consequence is a loss of skilled jobs, expertise and economic independence in passenger transport, threatening Europe's long-term prosperity.

Therefore, we call upon the European Commission to ensure fair competition with targeted measures:

- **Require “Made in Europe” content in public procurement**, especially when funded by EU taxpayers' money, by introducing local content requirements based at vehicle level on the whole value chain, recognising Europe-based research and development.
- Include bus manufacturing in the strategic industries requiring European preference.
- **Adjust evaluation criteria in public procurement** to ensure preference for European bus manufacturing, both for direct procurement of vehicles and for public tendering for operator concessions or contracts that necessitate follow-up vehicle procurement.
- **Require the acceptance and signing of the Global Procurement Agreement** by the supplier's country of origin in both direct and indirect bus procurements.
- **Consult independent bus manufacturers at early stages** on new technical regulations, and review upcoming changes, to ensure better alignment with the capabilities of the sector.
- **Review CO₂ standards and Euro 7 regulation** for buses and coaches. European independent bus manufacturers are ready to invest but need sufficient time to develop products that can be competitive.
- Ensure the EU Automotive Action Plan, Industrial Accelerator Act, and the revision of the Public Procurement Framework safeguard the European bus manufacturing industry for the long term.

If Europe is to succeed in its strategic priorities of a strong, resilient and competitive Union, it needs a robust European industry which invests, keeps its leading role in innovation, and ensures the preservation and growth of local jobs.

A strong automotive sector with flourishing independent bus manufacturers is a prerequisite for the Union to achieve its strategic objectives and to ensure a resilient, competitive, and sustainable Europe. With state-of-the-art buses and coaches developed, built and maintained in Europe, Europe will be able to increase its resilience, safeguard its supply chain, and reinforce its economic sovereignty.

The signatories, representing Europe's independent bus manufacturers, therefore **ask the Commission and Member States to urgently adopt the measures outlined above in order to reverse the current trend of unfair competition and ensure a level playing field for all.**



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