ESSEC BUSINESS SCHOOL | Institute for Geopolitics & Business

2025 DISTINGUISHED STUDENT WORK

CHINESE ELECTRIC VEHICLES AND INTERNAL EUROPEAN DIVISIONS: WHAT DOES THE FUTURE HOLD FOR THE OLD CONTINENT?

Noème FAGES
GRANDE ECOLE / MASTER IN MANAGEMENT

Under the supervision of: Philippe Le Corre, Professor of Geopolitics and Asian Studies at ESSEC
Course : Géo-économie de l'Asie-Pacifique

Chinese electric vehicles and internal European divisions: what does the future hold for the old continent?

Noème Fages

Program Grande Ecole / Master in Management
Supervised by: Philippe Le Corre, Professor of Geopolitics and Asian Studies at ESSEC Business School
Course: Geoeconomics of Asia-Pacific

Introduction

The European Commission's decision in 2024 to impose tariffs of up to 35% on imports of low-cost Chinese electric vehicles (EVs) highlights the escalating trade tensions between Europe and China (AFP, 2024). The rapid expansion of Chinese EVs is reshaping the global automotive market and presents a strategic dilemma for the European Union (EU). On one hand, Europe champions free trade and aims for an accelerated green transition, targeting a ban on internal combustion engine vehicles by 2035. On the other hand, it must safeguard an automotive industry that supports 13.2 million direct and indirect jobs, all while contending with fierce competition from China, fueled by substantial state subsidies and a vertically integrated production chain (Le Bec, 2024).

In just four years, the share of Chinese-made EVs in European imports has surged from 1% to over 50%, making the EU the primary overseas market for these vehicles (Wingender et al., 2024). This growth is part of a broader economic and technological rivalry between China and the United States. While Washington has already imposed high tariffs on Chinese EVs, the EU is torn between protectionism and maintaining open trade (Friedberg, 2020). China's strategy, driven by the “Made in China 2025” initiative, seeks dominance in key technologies, including batteries and EVs, raising concerns in both Brussels and Washington (Brinza et al., 2024).

Within Europe, opinions are divided: countries like France and Italy advocate for protectionist measures, whereas Germany and Hungary fear the potential fallout of a trade war with China (Brinza et al., 2024). The central question is how the EU can balance its climate goals, industrial sovereignty, and commitment to free trade in the face of China's growing influence in the EV market. This issue extends beyond trade, reflecting a broader reconfiguration of global economic power dynamics, with Europe caught between American pressure and Beijing's expanding influence.

Chinese Dominance in the Electric Vehicle Market

China as the Global Leader in Electric Vehicles

Since the early 2020s, China has emerged as the dominant force in the global electric vehicle (EV) market, leading in production, exports, and industrial competitiveness. In 2023, China overtook Japan and Germany to become the world's top car exporter, shipping over 4 million vehicles, a third of which were electric (Le Bec, 2024; Annex 2).

This dominance is underpinned by substantial state support, extensive vertical integration, and a long-term industrial strategy encapsulated in the “Made in China 2025” plan, which aims to position China as the global leader in strategic technologies, including batteries and EVs (Brinza et al., 2024).

A key advantage for China is its complete control over the EV value chain. Unlike Europe, where production is spread across multiple players, China manages the entire process – from raw material extraction to battery manufacturing and final vehicle assembly. This vertical integration allows Chinese manufacturers to significantly cut production costs and offer more affordable models compared to their European and American counterparts. Consequently, the average price of a Chinese EV is about 20% lower than that of European models, and battery costs in China are 17% cheaper (Bencivelli et al., 2024).

China's EV exports have surged as a result. In 2024, nearly 2 million Chinese EVs are expected to be exported, a fivefold increase since 2021 (Le Bec, 2024). The EU has become the primary destination for these exports, accounting for nearly two-thirds of China's EV shipments. Within just four years, the share of Chinese-made vehicles went from 1% to over 50% of all imported EVs in the EU, demonstrating Beijing's rapid market penetration (Wingender et al., 2024). By 2027, Chinese brands could account for nearly 20% of all battery EV sales in the EU (Le Bec, 2024).

A Model Built on Subsidies and Competitive Pricing

The success of Chinese manufacturers is largely attributed to extensive government support. Unlike Europe, where public aid to automakers is limited, China has implemented aggressive industrial policies at both national and local levels. These include direct subsidies to producers, preferential loans, and tax incentives (Le Bec, 2024). Additionally, only locally manufactured EVs qualify for subsidies, enabling Chinese brands like BYD, Nio, and Xpeng to quickly scale up production and market share (Bencivelli et al., 2024).

Beyond financial support, Beijing has promoted the growth of its automotive industry through stringent emission regulations and a phased ban on internal combustion vehicles in major cities like Beijing and Shanghai (Bencivelli et al., 2024). This has driven rapid domestic demand growth, allowing Chinese companies to achieve economies of scale and reduce production costs (Le Bec, 2024). The early electrification of public transport, through government orders for electric buses and taxis, has also helped Chinese manufacturers expand their production capabilities (Bencivelli et al., 2024). In 2023, 60% of the world's electric vehicles were on Chinese roads (Bencivelli et al., 2024).

Chinese manufacturers are now targeting international markets, particularly Europe, where the electrification of mobility presents new opportunities (Celasun et al., 2023). While the U.S. imposes 100% tariffs on Chinese EVs, the EU's lower tariffs, though potentially rising to 35%, have made Europe an attractive market (AFP, 2024). Some Chinese companies, such as BYD, are establishing local production facilities, like their planned factory in Hungary, to bypass trade barriers and gain easier access to the European market (Le Bec, 2024).

Mastery of the Entire Value Chain

A cornerstone of China's dominance in the EV market is its comprehensive control over the value chain, from raw material extraction to production and logistics. Unlike European and American manufacturers, which often rely on external suppliers for batteries and critical components, Chinese firms like BYD and CATL have adopted vertical integration strategies. This allows them to optimize costs and secure their supply chains (Aresu & Cerai, 2023).

China currently produces 64% of the world's lithium-ion batteries, a crucial component of EVs, with South Korea trailing at just under 25% (Bencivelli, 2024). China also dominates the refining of critical metals: it controls 98% of global natural graphite, the majority of Congolese cobalt, and over 60% of lithium refining (Pitron, 2018; Bencivelli, 2024). This control over raw materials gives Chinese manufacturers a significant geopolitical advantage, as they benefit from privileged access to these resources at lower costs than their European competitors (Le Bec, 2024).

Some manufacturers, like BYD, have extended their vertical integration to logistics. In 2024, BYD began operating its own fleet of ships to transport EVs, reducing reliance on foreign shipping companies and cutting export costs (Yang, 2024). This end-to-end control over production and distribution makes Chinese EVs more competitive globally.

In contrast, European manufacturers depend heavily on external suppliers for batteries and components, increasing their costs and vulnerability to raw material price fluctuations. The lack of vertical integration in Europe is a strategic disadvantage in the face of China's expanding EV industry, which benefits from a streamlined and nationally controlled supply chain (Wingender et al., 2024).

This complete control over the value chain enables Chinese manufacturers to offer lower-priced vehicles while maintaining competitive quality and performance. Supported by substantial state backing, this industrial dominance puts European brands at a disadvantage in

their home market and raises questions about the EU's industrial resilience against the rise of Chinese EVs.

The European Automotive Industry Facing the Chinese Challenge

A Key Industry for the European Economy

The automotive industry is a fundamental pillar of the European economy, accounting for about 10% of the manufacturing sector and employing 2.4 million workers directly (ACEA, 2024; see Annex 6 and Annex 7). Including 10.8 million indirect jobs, the automotive industry employs 13.2 million workers, which corresponds to 6.8% of European jobs (ACEA, 2024). Historically dominated by manufacturers such as Volkswagen, Renault, Stellantis, and BMW, it has long thrived through the export of premium internal combustion vehicles (Friedberg, 2020). However, the electrification of mobility is reshuffling the cards and exposing the structural weaknesses of the European industrial model.

In 2023, electric vehicles accounted for 15% of new car sales in Europe, a figure expected to grow with the European Union (EU) goal of banning the sale of internal combustion vehicles by 2035 (Wingender et al., 2024). This transformation requires massive investments to adapt production lines, develop competitive batteries, and meet environmental requirements. Between 2019 and 2023, European manufacturers represented nearly 23% of global investments in the development of EVs, illustrating their desire to catch up (Le Bec, 2024).

However, these efforts are hampered by several major obstacles. On the one hand, the production cost of EVs in Europe remains high, particularly due to the price of batteries, which are on average 17% more expensive than those produced in China (Bencivelli et al., 2024). On the other hand, Europe still largely depends on imports of critical materials necessary for battery manufacturing, most of which are refined under Chinese control (Wingender et al., 2024).

A Competition Deemed Unfair

European manufacturers are now facing what they consider to be unfair competition. As previously explained, Chinese electric vehicles are on average 20% cheaper than their European counterparts due to massive subsidies granted by Beijing to its strategic industries (Wingender et al., 2024). Support from the Chinese state is strong and takes the form of preferential financing, tax advantages, and facilitated access to raw materials (Le Bec, 2024). In contrast, in Europe, public aid is more limited and governed by the rules of the single

market. Thus, European manufacturers must contend with a dual constraint: competing with low-cost Chinese EVs while pursuing an energy transition governed by stricter environmental and social standards (Kirchner, 2023).

The European Commission has therefore acknowledged that China practices a form of industrial protectionism (European Commission, 2019). This is manifested not only through massive subsidies under the "Made in China 2025" plan but also through barriers to entry for foreign companies in China and the acquisition of strategic European companies through state funding (European Commission, 2019). Foreign companies must, for example, submit to preconditions such as technology transfers to Chinese companies and joint ventures with local players (European Commission, 2019). This threatens the competitiveness of European companies, particularly in the battery and automotive sectors.

Divisions Within the EU

A Europe Divided Between Cooperation and Protectionism

Faced with the rise of Chinese electric vehicles, the European Union finds itself deeply divided. While some member states are calling for protectionist measures to preserve their automotive industry, others, more dependent on trade with China, fear that taxing imports could trigger a trade war with harmful consequences. These differences reflect heterogeneous economic interests and make it difficult to adopt a unified strategy in the face of the rise of Chinese manufacturers (Brinza et al., 2024).

Germany, Europe's leading car producer, illustrates these tensions well. The Chinese market represents a crucial outlet for its manufacturers, particularly Volkswagen, BMW, and Mercedes-Benz, which achieve a significant portion of their sales there (Mertens-Lafay, 2020). This dependence explains Berlin's reluctance to support overly strict protectionist measures, for fear of possible retaliation from Beijing. In contrast, France and Italy, whose automotive industries are more vulnerable to Chinese competition, are actively defending the adoption of tariff barriers to protect their national manufacturers (La Tribune, 2024).

The Different Blocs Within the EU

The debates surrounding the measures to be adopted in the face of Chinese electric vehicles have highlighted three main groups of states within the European Union, each defending a different approach based on their economic and industrial interests.

First, the advocates of strict taxation: France, Italy, Poland, and several Central European countries (Blenkinsop, 2024; see Annex 8).

Paris strongly supports the adoption of tariffs of up to 35% on Chinese EVs, believing that their artificially low prices threaten the competitiveness of European manufacturers (La Tribune, 2024). Renault and Stellantis, which are investing massively in electrification, fear they will not be able to compete with the prices of subsidized Chinese models (Moyon, 2024). Central European countries, where the automotive industry is an essential economic driver, share this position because they host many production plants, and any destabilization of the European EV market could weaken their economy and jobs (Wingender et al., 2024).

The second group, consisting of countries such as Spain and Sweden, adopts a more cautious position (see Annex 8). Sweden, where Volvo, now owned by the Chinese group Geely, plays a key role in the country's industry, is hesitant to support protectionist measures that could harm Chinese investments on its territory and its automotive industry (Reuters, 2024a). Following its acquisition by Geely, Volvo has maintained a certain independence, and collaborations between the two brands have been successful (Jonsson & Vahlne, 2021), which could complicate Sweden's position. Following negotiations, the European Commission has also hinted at the possibility of exempting Volvo vehicles, most of which are produced in China, from higher tariffs (Reuters, 2024a). Sweden has therefore decided to remain neutral and abstain from votes concerning the higher proposed tariffs (see Annex 8).

Spain, for its part, recently changed its position on this issue, voting in favor of higher tariffs in July 2024 but now calling for more caution (Liboreiro, 2024). This follows possible Chinese retaliation on the European pork industry, a large part of which is located in Spain. Shortly after signaling its abstention, Spain was chosen by the Chinese giant CATL for the construction of one of the largest battery factories in Europe. This also follows a request from the Chinese government for its industries to suspend investments in European countries supporting higher tariffs (Reuters, 2024b). Spain, which is used to voting in favor of European Commission proposals, thus faces a dilemma between imposing higher tariffs and protecting its national industry from Chinese pressure (Liboreiro, 2024).

Finally, the main opponents of restrictions are Germany, Hungary, and other Eastern European states (see Annex 8). Germany is the European country most opposed to the imposition of customs tariffs on Chinese electric vehicles, a position motivated by its strong dependence on the Chinese market and its industrial ties with Chinese e-mobility players. In 2023, Volkswagen sold more than 40% of its vehicles in China, while BMW and Mercedes-Benz achieved an essential part of their profits there (Mertens-Lafay, 2020). With Beijing being a key trading partner, German manufacturers fear retaliatory measures that could weaken their sales and presence in China.

In addition, Germany also benefits from strategic Chinese investments, notably in battery production, with CATL's factory in Thuringia, the first in Europe, being a prime example (Reuters, 2023).

Hungary, highly dependent on Chinese investments in the battery sector, also opposes trade restrictions. Budapest considers Chinese investments as an opportunity for economic growth and, unlike other EU members, does not see China as a rival and competitor and therefore does not wish to hinder these capital flows (Brinza et al., 2024). In 2023, China became the main investor in Hungary, with 10.7 billion euros invested through numerous battery factory projects, particularly by Chinese giants BYD and CATL (Thorpe, 2024).

These divisions make it difficult to adopt a common response to the rise of Chinese electric vehicles. The European Union thus finds itself torn between the need to defend its industry and the risk of weakening its trade relations with China.

The Complex Balance Between Ecological Transition and Industrial Protection

Beyond economic divergences, European divisions highlight a fundamental contradiction between the EU's climate objectives and the need to protect its automotive industry. The EU has set a goal to ban the sale of internal combustion engine vehicles by 2035, necessitating a rapid electrification of its vehicle fleet (Kirchner, 2023). Chinese electric vehicles (EVs), being cheaper and more accessible, could accelerate this transition.

However, these vehicles also have a higher carbon footprint compared to their European counterparts. Although essential for reducing CO_2 emissions, their production still largely relies on coal-generated electricity, which diminishes their environmental benefits relative to models produced in Europe (Kirchner, 2023).

On one hand, Europe aims to speed up the energy transition by promoting the adoption of electric vehicles. On the other, it must ensure that this transition does not come at the expense of its industrial base. The challenge for the European Union is to reconcile these two imperatives without compromising either its economic sovereignty or its environmental commitments (Kirchner, 2023).

What Does the Future Hold for Europe?

European Strategies

In the face of the rise of state-backed Chinese companies, the European Commission redefined in 2019 the EU's relationship with China, now qualified as a “partner, competitor, and rival” (Andreea, 2024). To limit the risks of excessive dependence without completely breaking ties, the EU has adopted a “de-risking” strategy (Brinza et al., 2024), combining

strategic pragmatism and the desire to ensure a “fair market” (European Commission, 2019). This translates into increased control of foreign investments, anti-subsidy rules, and reciprocity measures in public markets (European Commission, 2019). It also involves diversifying international suppliers of rare earths to avoid dependence on China, as well as developing rare earth extraction projects on European soil (European Parliament and Council, 2024). However, the Union remains divided and struggles to establish a coherent industrial strategy (Andreea, 2024).

Several levers are being considered to address the competition from Chinese electric vehicles (EVs), whose competitiveness is partly based on low-cost but highly carbon-intensive electricity (Kirchner, 2023). Some experts recommend imposing stricter environmental criteria on imports to favor models produced with cleaner energy, without resorting to tariff barriers. Others propose strengthening local production requirements to encourage Chinese manufacturers to invest in Europe, following the example of BYD's factory in Hungary (Brinza et al., 2024).

Meanwhile, European manufacturers are reacting by forming strategic alliances, particularly in the battery sector, with gigafactory projects in France, Germany, and Sweden. The European Battery Alliance, launched in 2017 by the European Commission, embodies this desire to reduce dependence on China (Pitron, 2018). Some groups, such as Stellantis, are also collaborating with Chinese brands to remain competitive (Bürbaumer, 2024).

The European Commission, for its part, is investigating Chinese subsidies and considering anti-dumping measures (Brinza et al., 2024). But without a more ambitious industrial policy, these actions remain limited. Europe is also debating the introduction of tariffs of up to 35% on Chinese EVs, following the 100% imposed by the United States (Friedberg, 2020; Afp, 2024). This prospect divides the member states: some see it as a necessity to protect the local industry, while others, like Germany, fear a trade war with Beijing.

Finally, an overly protectionist policy could slow down the ecological transition, increase the cost of EVs for consumers, and harm European growth. Conversely, controlled openness, favoring Chinese foreign direct investments (FDI) in Europe, could offer a better compromise (Wingender et al., 2024; Celasun et al., 2023).

In a recent article, the International Monetary Fund (IMF) (Wingender et al., 2024) explores three scenarios corresponding to the different strategies mentioned above for the future of the electric vehicle market in Europe.

The first scenario, the EV shock scenario, predicts a rapid increase in the Chinese market share in Europe, similar to Japanese carmakers' rise in the United States, but faster. The second, the protectionist scenario, envisages high tariffs to curb Chinese imports, at the risk of increasing costs for consumers, provoking Chinese retaliation, and slowing down the ecological transition in Europe. The third scenario encourages Chinese FDI in Europe to stimulate local EV production, thereby reducing transition costs.

In terms of impact on GDP, the EV shock scenario would entail low but unequal initial costs depending on the country, while the protectionist scenario could reduce GDP due to increased costs and potential retaliation from China. The FDI increase scenario could mitigate these negative impacts by stimulating local production.

These scenarios, inspired by the historical experience of Japanese carmakers in the United States, must be interpreted with caution but nevertheless provide insight into the different strategies available to the EU. The IMF recommends a balanced approach, favoring the third scenario, to impose environmental criteria on imported vehicles and encourage local production through FDI, thereby protecting the European industry while promoting a fair market.

A Challenge to International Trade

The rise of Chinese electric vehicles (EVs) and the resulting trade tensions are calling into question the very foundations of international trade, particularly the principle of free trade. The Sino-American rivalry, intensified by protectionist policies such as those implemented by the Trump administrations, exemplifies this challenge. By imposing high tariffs on Chinese electric vehicles, the United States aims to protect its domestic industry and curb China's technological ascent (Bürbaumer, 2024). Since Donald Trump's return to the White House, U.S. tariffs have reached their highest level since 1945 (Albert, 2025). The European Union will not be spared from this surge in American protectionism and is expected to face new 25% tariffs on its exports to the United States (Franceinfo, 2025).

This dynamic forces Europe to navigate between its commitment to free trade and the need to protect its strategic industries, such as automotive and electric batteries. Internal divisions within the EU, particularly between countries like Germany, which is reluctant to impose tariffs, and others like France, which supports protectionist measures, complicate the implementation of a coherent strategy (Brinza et al., 2024).

China, adopting a hybrid model, benefits from open markets while protecting its own, is perceived as a threat by the United States and Europe (Friedberg, 2020).

This Chinese approach, combined with massive subsidies and practices deemed unfair, challenges the viability of the free trade system as defined by the World Trade Organization (WTO) (Chimits, 2021).

In this context, Europe must not only balance economic sovereignty and ecological transition but also define its role in a changing international order marked by fragmentation into economic and technological blocs (Li & He, 2022). The EU's ability to strike a balance between pragmatic cooperation with China and the protection of its economic interests will be decisive for its future in this new world order. American pressures to contain China's rise and European concerns about market distortions and technological control fuel tensions, making it crucial to define a coherent and unified European strategy (Le Bec, 2024). The future of China-Europe relations will depend on the EU's capacity to protect its industry without resorting to excessive protectionism, while managing trade tensions and disputes related to Chinese subsidies and industrial practices (Andreea, 2024).

Based on the preceding paragraphs and Friedberg's analysis (2020), three scenarios are possible for the evolution of global economic and trade relations. The first scenario, which is quite unlikely given the increasing trade tensions between certain states, involves continued economic integration (Friedberg, 2020). The second scenario, which seems less likely since the imposition of U.S. tariffs, involves a bipolarization with China structuring its own economic bloc against a Western bloc. Given recent announcements from Washington and the EU's determination to protect its industries, the third scenario, widespread protectionism, appears to be the most likely in the short term.

Conclusion

Chinese dominance in the electric vehicle (EV) sector represents a major strategic challenge for the European Union, which must reconcile its ecological ambitions with the protection of its automotive industry. Thanks to complete vertical integration, massive state subsidies, and a long-term industrial strategy, China has managed to establish itself as the global leader in EVs, capturing a significant share of the European market.

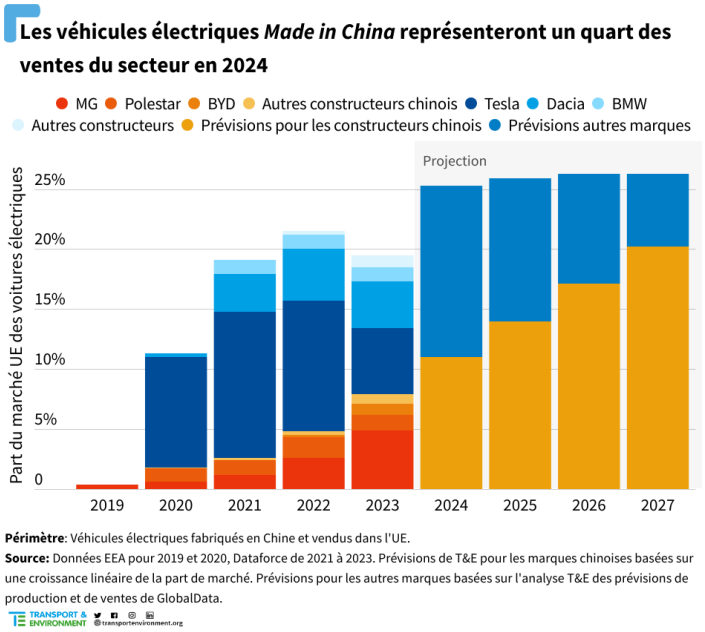
Internal divisions within the EU further complicate the situation. While some member states, such as France and Italy, advocate for protectionist measures to protect their national manufacturers, others, like Germany, fear the repercussions of a trade war with China. These differences reflect the varied economic interests of the member states and make it difficult to adopt a unified strategy in the face of the rise of Chinese EVs.

In a context of increasing Sino-American rivalry, Europe must also define its place in a changing world order. The EU's ability to find a balance between pragmatic cooperationwith China and the protection of its economic interests will be decisive for its future. American pressures to contain China's rise and European concerns about market distortions and technological control fuel tensions, making it crucial to define a coherent and unified European strategy.

Ultimately, Europe must arbitrate between economic sovereignty and ecological transition while adapting to an increasingly fragmented international environment. The way it meets this challenge will determine not only its role in the new global economy but also the viability of its ecological and industrial ambitions.

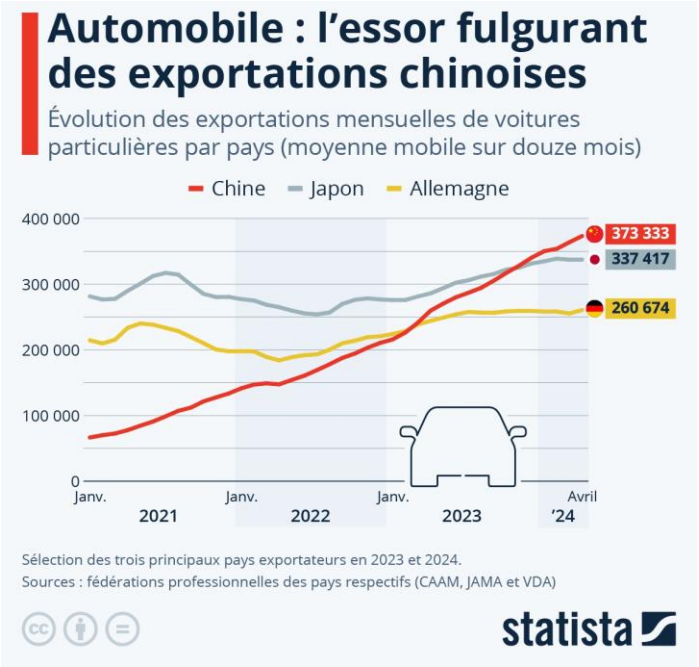
Annex

Annex 1 - Evolution of EV manufacturers' market share in the EU, 2019-2027



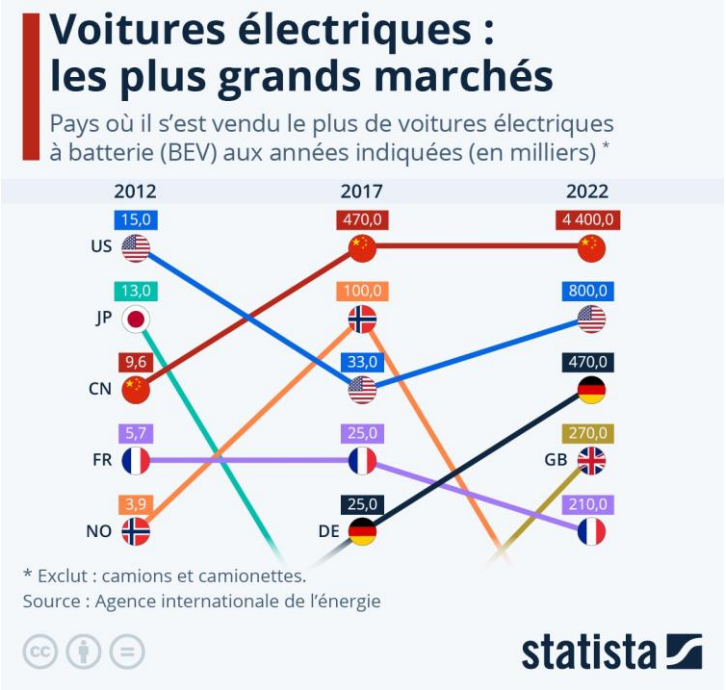
Source : https://www.transportenvironment.org/articles/how-europe-can-use-tariffs-as-part-of-an-industrial-strategy

Annex 2 - Evolution of monthly exportations of personal cars by country (average over 12 months), 2021-2024



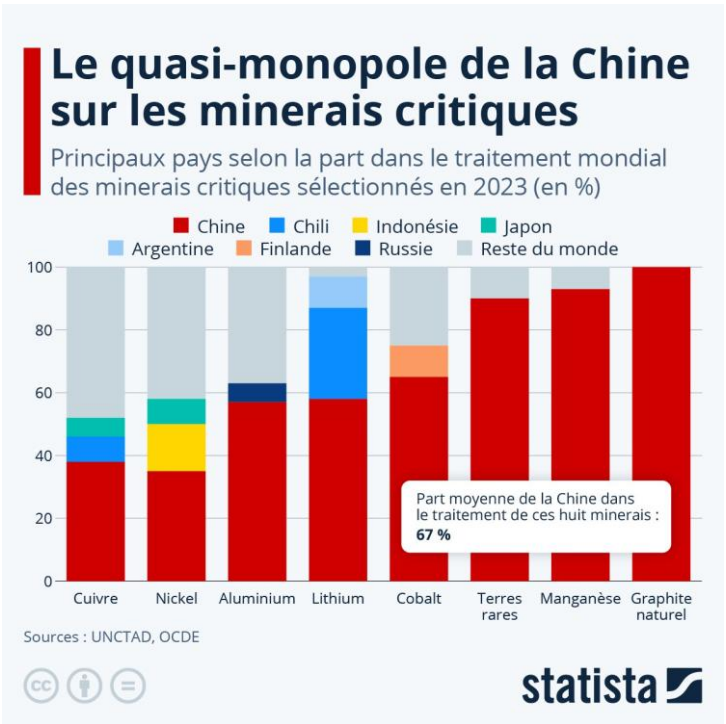
Source : https://fr.statista.com/infographie/31356/automobile-evolution-exportations-mensuelles-voitures-principaux-pays-exportateurs/

Annex 3 - Countries where the most EVs were sold during the period 2012-2022



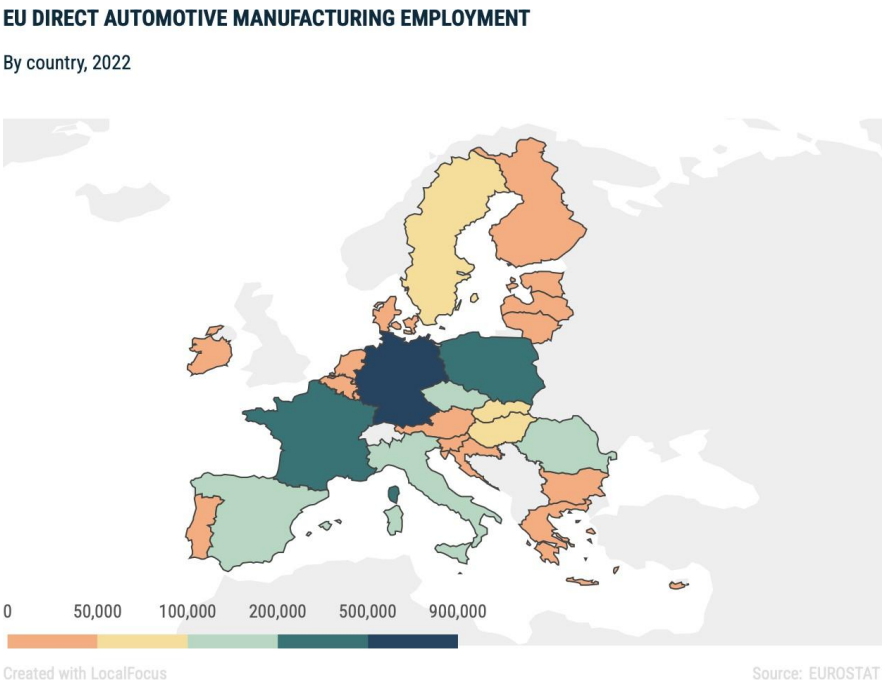
Source : https://fr.statista.com/infographie/30471/plus-grands-marches-ventes-voitures-electriques-par-pays-evolution-2012-2022/

Annex 4 - Countries with the highest shares of rare earth production and treatment in 2023



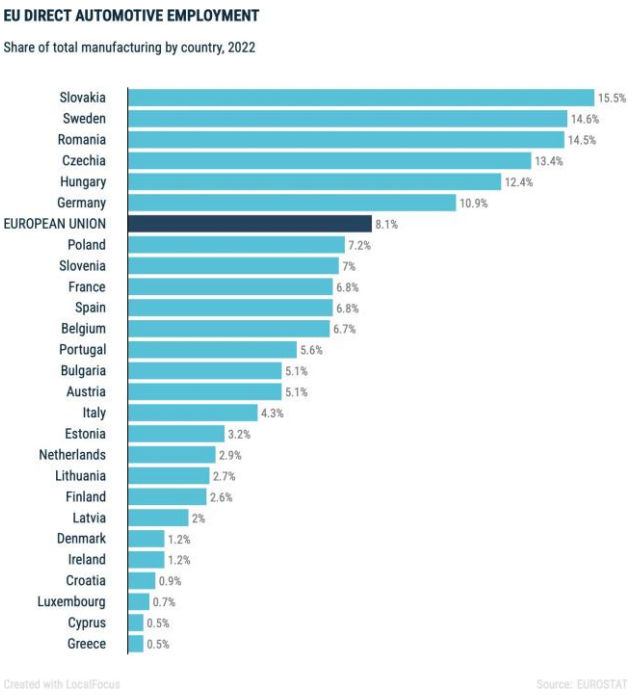
Source : https://fr.statista.com/infographie/32727/principaux-pays-traitement-minerais-strategiques-nickel-lithium-cobalt-terres-rares/

Annex 5 - EU direct automotive manufacturing employment, by country, 2022



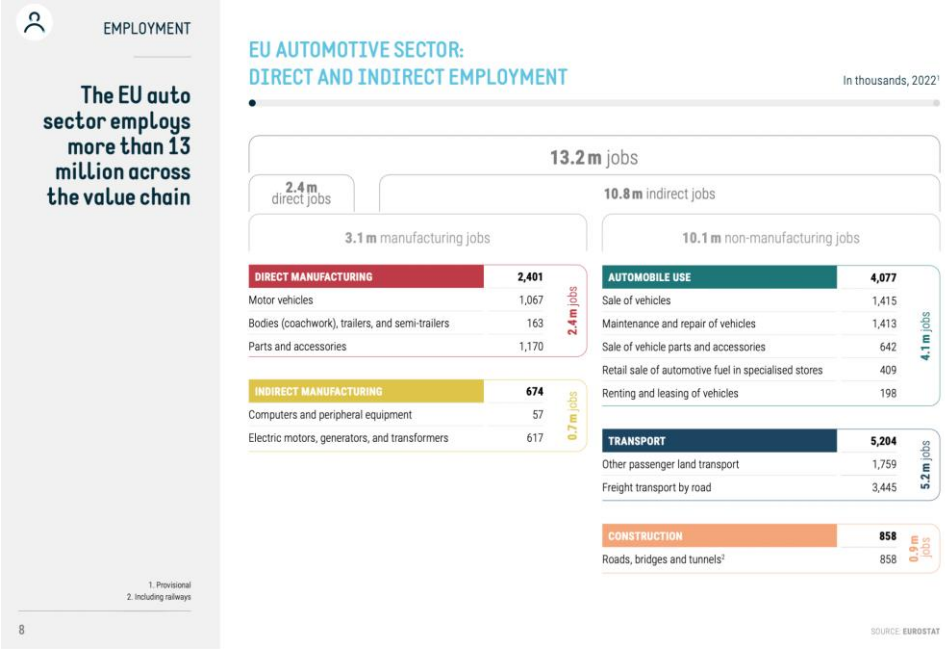
Source : https://www.acea.auto/figure/direct-automotive-manufacturing-jobs-in-the-eu-by-country/

Annex 6 - EU direct automotive employment's share of total manufacturing (%), by country, 2022



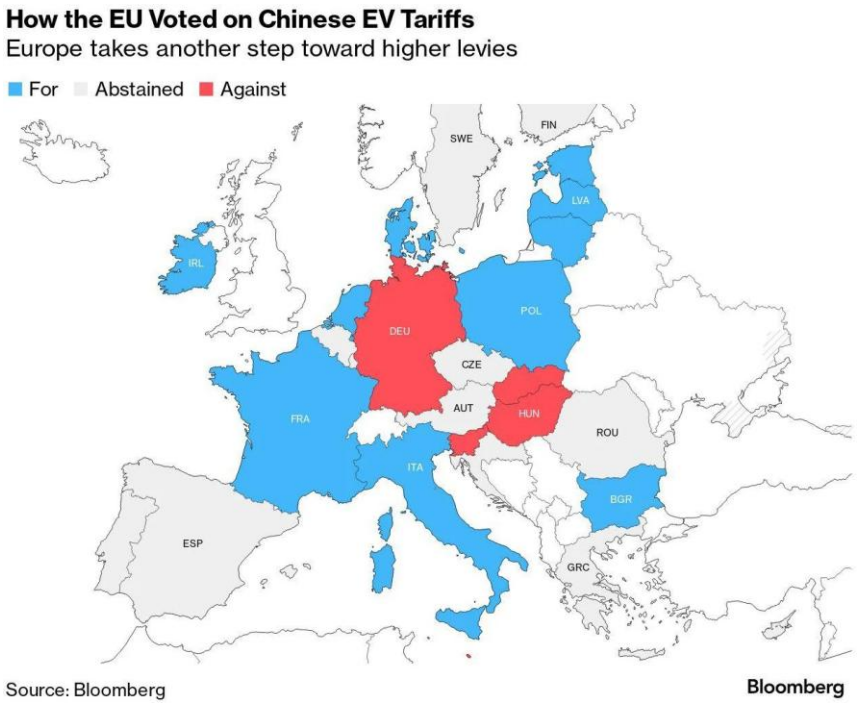
Source : https://www.acea.auto/figure/share-of-direct-automotive-employment-in-the-eu-by-country/

Annex 7 - EU automotive sector: direct and indirect employment (in thousands), 2022



Source : https://www.acea.auto/figure/automotive-sector-direct-and-indirect-employment-in-the-eu/

Annex 8 - Votes of different EU countries on whether to impose new tariffs on Chinese EVs, 2024



Source : https://www.bloomberg.com/news/articles/2024-10-07/eu-s-yes-votes-on-china-ev-tariffs-seen-as-targets-for-revenge?embedded-checkout=true

Bibliography :

Afp, L. M. A. (2024, October 4). Taxe sur les véhicules électriques chinois : les Etats membres de l'Union européenne donnent leur accord. *Le Monde.fr*. https://www.lemonde.fr/economie/article/2024/10/04/taxe-sur-les-vehicules-electriques-chinois-les-etats-membres-de-l-union-europeenne-donnent-leur-accord_6343556_3234.html

Albert, E. (2025, March 28). Les droits de douane américains sont au plus haut depuis 1945, un choc pour l'économie mondiale. *Le Monde*. https://www.lemonde.fr/economie/article/2025/03/28/les-droits-de-douane-americains-sont-au-plus-haut-depuis-1945-un-choc-pour-l-economie-mondiale_6587086_3234.html

Andreea, B. (2024). The EU needs but lacks a comprehensive strategy on China [Analysis]. *Trans European Policy Studies Association*. https://tepsa.eu/analysis/the-eu-needs-but-lacks-a-comprehensive-strategy-on-china/

Aresu, A., & Cerai, A. P. (2023, August 30). BYD et CATL : dans la tête des Prométhées chinois de l'électricité. *Le Grand Continent*. https://legrandcontinent.eu/fr/2023/08/30/byd-et-catl-dans-la-tete-des-promethees-chinois-de-lelectricite/

Bencivelli, L., Lajer Baron, A., Suárez-Varela, M., & Vuletic, M. (2024). The Rise of the Electric Vehicle in China and its Impact in the EU. *Banco de Espana Article*, *3*(2024), Q4. http://dx.doi.org/10.2139/ssrn.5126797

Blenkinsop, P. (2024, October 4). EU presses ahead with Chinese EV tariffs after divided vote. *Reuters*. https://www.reuters.com/business/autos-transportation/eu-governments-face-pivotal-vote-chinese-ev-tariffs-2024-10-04/

Brinza, A., Bērziņa-Čerenkova, U. A., Le Corre, P., Seaman, J., Turcsányi, R., & Vladisavljev, S. (2024). EU-China relations: De-risking or de-coupling – the future of the EU strategy towards China [Study]. *European Parliament*. https://www.europarl.europa.eu/RegData/etudes/STUD/2024/754446/EXPO_STU(2024)754446_EN.pdf

Bürbaumer, B. (2024). Le véhicule électrique au cœur de la bataille technologique entre la Chine et les États-Unis. https://hal.science/hal-04614649v1

Celasun, O., Sher, G., Topalova, P. and J. Zhou. (2023). Cars and the Green Transition: Challenges and Opportunities for European Workers. *IMF Working Paper 23/116*. https://doi.org/10.5089/9798400244766.001

Chimits, F. (2021). Chasing the ghost of transatlantic cooperation to level the playing field with China: Time for action [Report]. *Mercator Institute for China Studies*. https://merics.org/en/report/chasing-ghost-transatlantic-cooperation-level-playing-field-china-time-action

European Automobile Manufacturers' Association (ACEA). (2024). The Automobile Industry Pocket Guide 2024/2025. https://www.acea.auto/files/ACEA-Pocket-Guide-2024-2025.pdf

European Commission. (2019). EU-China: A strategic outlook [Report]. European https://commission.europa.eu/system/files/2019-03/communication-eu-china-a-strategic-outlook.pdf

European Parliament and Council. (2024, April 11). Regulation (EU) 2024/1252 of the European Parliament and of the Council of 11 April 2024 establishing a framework for ensuring a secure and sustainable supply of critical raw materials and amending Regulations (EU) No 168/2013, (EU) 2018/858, (EU) 2018/1724 and (EU) 2019/1020. *Official Journal of the European Union, L 2024/1252*, 3 mai 2024. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32024R1252

Franceinfo. (2025, March 27). Cinq questions sur la hausse de 25% des droits de douane sur les automobiles étrangères annoncées par Donald Trump. *France Télévisions*. https://www.francetvinfo.fr/monde/usa/presidentielle/donald-trump/cinq-questions-sur-la-hausse-de-25-des-droits-de-douane-sur-les-automobiles-etrangeres-annoncee-par-donald-trump_7154589.html

Friedberg, A., Traduction Frey, C. (2020) . L'intensification de la rivalité États-Unis/Chine dans les domaines économique et technologique. *Revue Défense Nationale*, N° 831(6), 29-44. https://doi.org/10.3917/rdna.831.0029.

Jonsson, A., & Vahlne, J.-E. (2021). Complexity offering opportunity: Mutual learning between Zhejiang Geely Holding Group and Volvo Cars in the post-acquisition process. *Global Strategy Journal*, 1-32. https://doi.org/10.1002/gsj.1424

Kirchner, A. (2023) . Les quatre paradoxes de la transition écologique de l'automobile européenne. *Annales des Mines - Réalités industrielles*, Mai 2023(2), 48-52. https://doi-org.essec.idm.oclc.org/10.3917/rindu1.232.0048.

La Tribune. (2024, 29 October). Droits de douane : l'UE adopte la surtaxe sur les voitures électriques chinoises. *La Tribune.fr*. https://www.latribune.fr/entreprises-finance/industrie/automobile/droits-de-douane-l-ue-adopte-la-surtaxe-sur-les-voitures-electriques-chinoises-1010093.html

Le Bec, A. (2024) Automobile : vers un leadership chinois ?: Les constructeurs chinois à l'assaut du marché mondial. *Futuribles (Paris)*. [Online] N° 462 (5), 51–71. https://doi-org.essec.idm.oclc.org/10.3917/futur.462.0051

Li, Y., & He, Z. (2022). The remaking of China–Europe relations in the new era of US–China antagonism. *Journal of Chinese Political Science*, *27*(3), 439-455. https://doi.org/10.1007/s11366-022-09792-5.

Liboreiro, J. (2024, September 11). Sánchez urges the EU to 'reconsider' tariffs on Chinese electric cars, exposing cracks. *Euronews*. https://www.euronews.com/my-europe/2024/09/11/sanchez-urges-the-eu-to-reconsider-tariffs-on-chinese-electric-cars-exposing-cracks

Mertens-Lafay, J. (2020) . Les échanges commerciaux entre l'Allemagne et la Chine : concurrents ou partenaires ? *Allemagne d'aujourd'hui*, N° 231(1), 82-100.https://doi.org/10.3917/all.231.0082.

Moyon, P. (2024, February 15). Renault et Stellantis face à la menace chinoise. *Ouest-France*. https://www.ouest-france.fr/economie/automobile/renault-et-stellantis-face-a-la-menace-chinoise-2acf0a54-cbf0-11ee-a3b1-a38454b34a5c

Pitron, G. (2018, August). Voiture électrique, une aubaine pour la Chine. *Le Monde diplomatique*. https://www.monde-diplomatique.fr/2018/08/PITRON/58979

Reuters. (2023, January 27). China's CATL German plant targets six battery cell production lines by end-2023. *Euronews*. https://www.euronews.com/2023/01/27/catl-germany

Reuters. (2024a, October 4). Sweden, Volvo Cars hope for better deal on any EU Chinese EV tariffs. *Reuters*. https://www.reuters.com/business/autos-transportation/sweden-abstain-vote-eu-tariffs-chinese-electric-vehicles-2024-10-04/

Reuters. (2024b, December 10). Stellantis, China's CATL to invest $4.33 bln in EV battery factory in Spain. *Reuters*. https://www.reuters.com/business/autos-transportation/stellantis-chinas-catl-invest-433-bln-ev-battery-factory-spain-2024-12-10/

Thorpe, N. (2024, April 27). Hungary opens up to Chinese tech despite protests. *BBC News*. https://www.bbc.com/news/world-europe-68848770

Wingender, P., Yao, J., Zymek, R., Carton, B., Cerdeiro, D., & Weber, A. (2024). Europe's Shift to EVs Amid Intensifying Global Competition, *IMF Working Papers*. https://doi.org/10.5089/9798400291371.001

Yang, Z. (2024, January 30). Why the world's biggest EV maker is getting into shipping. *MIT Technology Review*. https://www.technologyreview.com/2024/01/30/1087393/byd-shipping-electric-cars-china/