

From Dependency to Sovereignty

11/11/2026 Winning the new industrial race through speed, scale and strategic industry clusters.

Europe's industrial position is being reshaped by China's scale and integrated supply chains, US capital and demand advantages, as well as Europe's strong but fragmented research and engineering base. Its central weakness is converting these strengths into competitive factories, industrial learning and value creation. Germany illustrates the urgency, as its machinery and manufacturing base is both a strategic asset and exposed to declining investment and production momentum.

The study goes beyond diagnosing Europe's industrial position. It examines four key technologies and sets out 15 concrete recommendations for policymakers and industry. Its core message: Europe must do more than fund innovation. It has to industrialize it, because competitiveness and value creation are decided on the factory floor, not in the lab. For executives, the study offers a framework to test their strategic priorities, decide which positions in the value chain they want to control and define where to start now.

Read the whole strategy paper: From Dependency to Sovereignty

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