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January 27, 2026

Mr. Jim Farley  
President and Chief Executive Officer  
Ford Motor Company

Dear Mr. Farley,

China poses a serious threat to our supply chain independence and economic security. As you know, our auto industry is not immune to this challenge. Given recent developments, I respectfully request additional information regarding Ford's current and planned battery-related licensing and procurement arrangements involving Chinese entities.

Public statements from Ford indicate that the company plans to repurpose its existing U.S. battery manufacturing facilities to produce lithium iron phosphate (LFP) cells and grid-scale energy storage systems.<sup>1</sup> This effort would leverage technical know-how licensed from Contemporary Amperex Technology Co., Limited (CATL), a Department of War-designated Chinese military company. Ford's apparent changes follow enactment of the One Big Beautiful Bill Act, which placed new restrictions on eligibility for clean energy tax credits—including limits related to licensing arrangements with prohibited foreign entities.

In particular, the statute disqualifies tax credits for licensing agreements that are modified after the bill's enactment, or that involve ongoing technical dependence or revenue-sharing with a foreign-influenced entity.<sup>2</sup> Ford's revised business plan raises important questions about whether the original licensing terms have been updated, expanded, or otherwise altered to accommodate the company's new focus on energy storage systems and data center markets.

As Chairman of the House Select Committee on China, I am concerned about Chinese companies' exploitation of key industries and ensuring associated implementation of the law and transparency regarding tax credit eligibility under recent reforms. To better understand the implications for tax credit eligibility and compliance with the updated law, I request that Ford provide the following information by February 4, 2026:

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<sup>1</sup> <https://www.fromtheroad.ford.com/us/en/articles/2025/ford-reinvests-trucks-hybrids-affordable-electric-vehicles>

<sup>2</sup> 26 U.S. Code § 7701(a)(51)(D)(ii)(III)(aa)(GG)

1. Please describe the original terms of Ford's licensing arrangement with its Chinese partner, including the effective date and whether the agreement grants the foreign entity any rights to influence production, retain technical control, or receive royalties based on output.
2. Have any amendments, expansions, or new scopes of work been added to that licensing arrangement since July 4, 2025, particularly in connection with Ford's newly announced plans to enter the energy storage market?
3. What steps has Ford taken to evaluate or mitigate the cybersecurity, data integrity, or operational risks associated with deploying battery systems containing Chinese-licensed technology into U.S. critical infrastructure, including grid-scale storage and data center environments?
4. Does Ford intend to claim advanced manufacturing or clean energy tax credits under Sections 45X, 45Y, or 48E of the Internal Revenue Code in connection with any products, components, or systems that incorporate the licensed battery technology?
5. Please describe whether Ford is currently engaged in, or contemplating, any additional joint investment, battery supply, technology licensing, or technology transfer arrangements with other Chinese automobile or battery manufacturers, such as BYD—as was recently reported by the Wall Street Journal—for hybrid or other vehicle platforms, and how Ford evaluates the strategic and policy implications of such arrangements.<sup>3</sup>

I appreciate your attention to this request and your continued leadership in U.S. manufacturing and innovation.

Sincerely,



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John Moolenaar  
Chairman

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<sup>3</sup> <https://www.wsj.com/business/autos/https-www-wsj-com-business-autos-china-geely-auto-us-market-6d2d67ca-3808e678>