

CHIPDIPLO: Europe's semiconductor ecosystem faces **geopolitical risk**

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From Coal and Steel to Chips: Europe's New Industrial Backbone



The Signing of the Treaty of Paris (ECSC, 1951)

From the European Coal and Steel Community to Silicon Geopolitics:

- **Coal and steel** as foundations of Europe's industrial power and energy landscape in the 1950s
- **Semiconductors** as the fuel of Europe's industrial present & future
- **A comparable ambition to:**
 - unify efforts and consolidate a competitive ecosystem
 - accelerate industrial innovation
 - strengthen resilience across supply chains

The Chips Diplomacy Support Initiative (CHIPDIPLO)'s guiding principles:

- Geopolitics create **incentives for industrial policy** and force us to **rethink our approach to technology transfers**.
- The EU needs to better integrate geopolitical risks into its semiconductor policies, through:
 - a **more coordinated approach** among EU stakeholders;
 - expanded networks of expertise with **key global partners**.

CHIPDIPLO: Project Overview



7 industry webinars:

mapping geopolitical risks, semiconductors and AI, tech restriction regimes, critical raw materials, critical sectors, chips and cleantech, supply chain diversification...



3 closed-door dialogues, 2 table-top exercises



3 public conferences



Regular briefings and updates to the European Commission



The EU Semiconductor Risk Monitor (EUSRM)



An interactive map of the EU ecosystem



5 policy papers:

- Three scenarios for a post-Wassenaar world,
- Strategic autonomy and strategic indispensability,
- Market access challenges in China and the US,
- Three scenarios for trends in semiconductor investment diversification towards 2035,
- External dependencies: deterring supply chain weaponization

Involvement of Industry Stakeholders



Representatives from **50+ industrial companies** have attended CHIPDIPLO events



Active involvement of **industry associations and RTOs**



A continuously database of **400+ contacts** (industry, Member States, EU officials, academia) which receive invitations and public deliverables



Adjusting to the Geopolitics of Technology

US-China strategic competition as a driving force

Chinese non-market policies,

And an industrially assertive U.S.:



From Trump 1's Huawei regime...



... to Biden's export controls, Chips Act and Building Chips in America Act...



... and to Trump 2's rescission of the AI Diffusion Rule, trade negotiations, section 232 investigation, and pressure on allies to invest in the United States.

Riding a global wave of industrial policy



Made in China 2025 (2015)



Foundries Act (2020)



First targeted policies (2020)



K-Belt Semiconductor Strategy (2021)



Semiconductor and Digital Strategy (2021)