SEMICON EUROPA

10-13 November 2026, Munich

ICOS²

INTERNATIONAL COOPERATION ON SEMICONDUCTOR INNOVATION AND SUPPLY CHAIN RESILIENCE

ICOS²: Driving International Cooperation on Semiconductors

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Funded by the European Union

What is ICOS² ?

International Cooperation on Semiconductors Innovation and Supply Chain Resilience

- **Coordination and Support Action (CSA)**
- Started in June 2026, for a 3-year period
- Funded under Horizon Europe

ICOS² aligns with the **European Chips Act** and the **EU's broader strategy**, ensuring:

Strong EU positioning

Industrial competitiveness

Supply chain resilience

ICOS² is coordinated by: Tyndall

Tyndall National Institute

ICOS² Partners

Research & Technology Organisations

Tyndall
Fraunhofer
VTT
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Industrial Partners

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BOSCH
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Academic Partners

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Warsaw University of Technology
Centre for Advanced Materials and Technologies CEZAMAT

Associations & Consultants

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VDI VDE IT
DKE

Why international cooperation matters for Europe



ICOS² Objectives

Strengthening Europe's Technological Autonomy

ICOS² supports pillar 3 of the EU Chips Act, emphasizing international partnerships, and building global alliances that support innovation and supply resilience

Evidence-Based Policy & Strategic Guidance

ICOS² will conduct in-depth analysis of economic value chains as well as in Europe's strengths, gaps and potential alliances

Enabling Global Research & Innovation Collaboration

To support pillar 1 of EU Chips Act, ICOS² will identify mutually beneficial R&I cooperation with global leaders, in advanced technologies and functionalities

Promoting Sustainable & Inclusive Innovation

Integrating sustainability and societal values is of importance for ICOS², setting the foundations for a responsible and future-proof semiconductor ecosystem

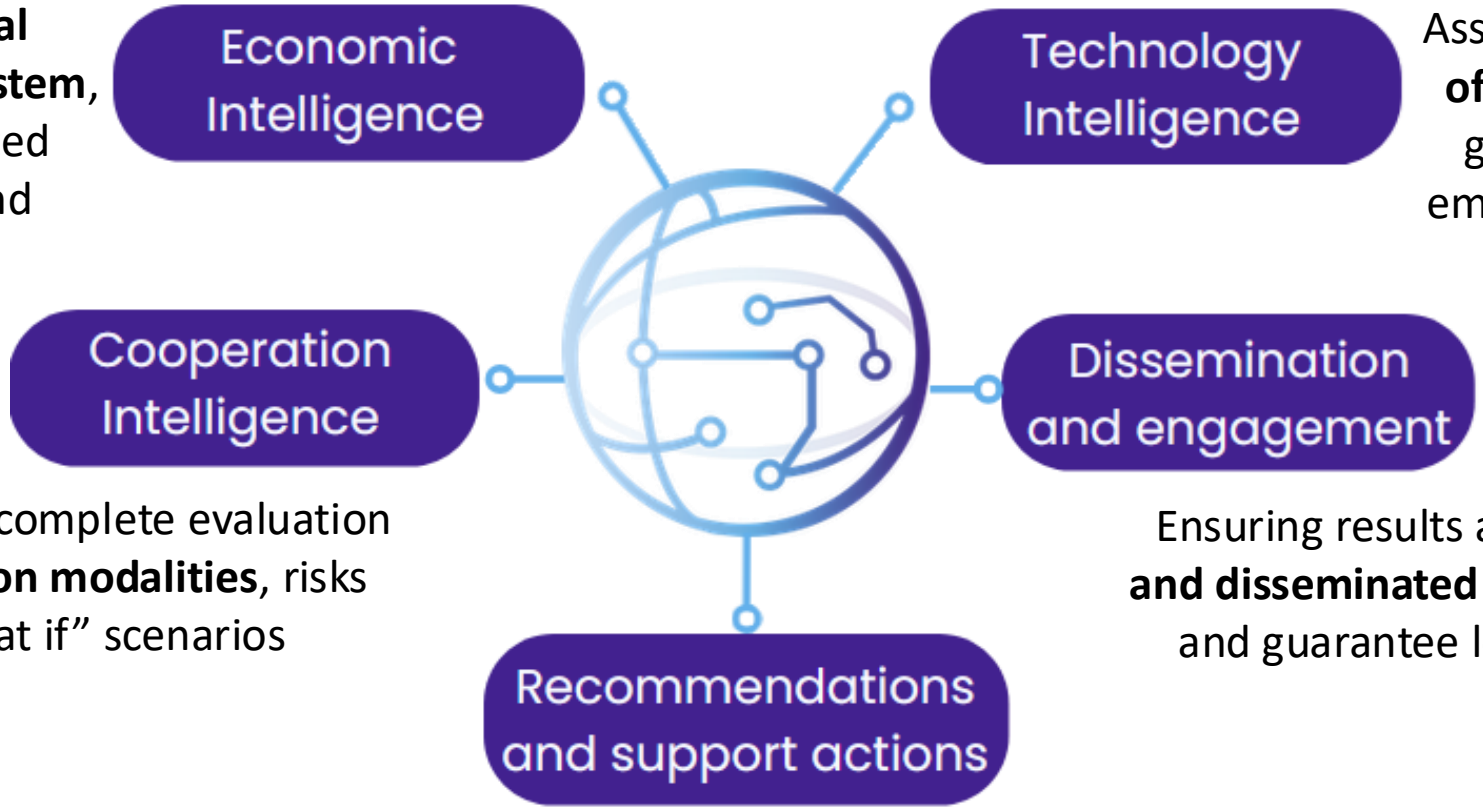
Facilitating International Engagement & Trust-Building

ICOS² will act as a neutral platform for EU and foreign stakeholders to build trust and to align on technical & regulatory standards

ICOS² Activities and outcomes

Mapping the **global semiconductor ecosystem**, analysing its expected evolution, gaps, and vulnerabilities.

Assessing the **positioning of the EU** relative to its global competitors in emerging semiconductor technologies.



Conducting a complete evaluation of **cooperation modalities**, risks and “what if” scenarios

Ensuring results are **communicated and disseminated** to maximise uptake and guarantee long-term impact.

Translating results into **concrete actions,** promoting cooperation and researcher mobility in priority fields.

Geographical scope



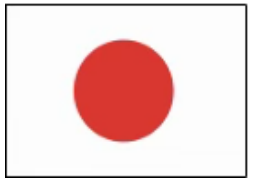
EU



USA



China



Japan



Taiwan



Republic of Korea



Singapore



India



Canada new



Rest of the World

From ICOS to ICOS²

ICOS focused on **identifying** areas where research cooperation with leading semiconductor countries can contribute to the growth and competitiveness of the European semiconductor industry.

ICOS **established Europe's first systematic framework** for international semiconductor cooperation.

ICOS² is designed as a direct continuation and expansion of ICOS, delivering:

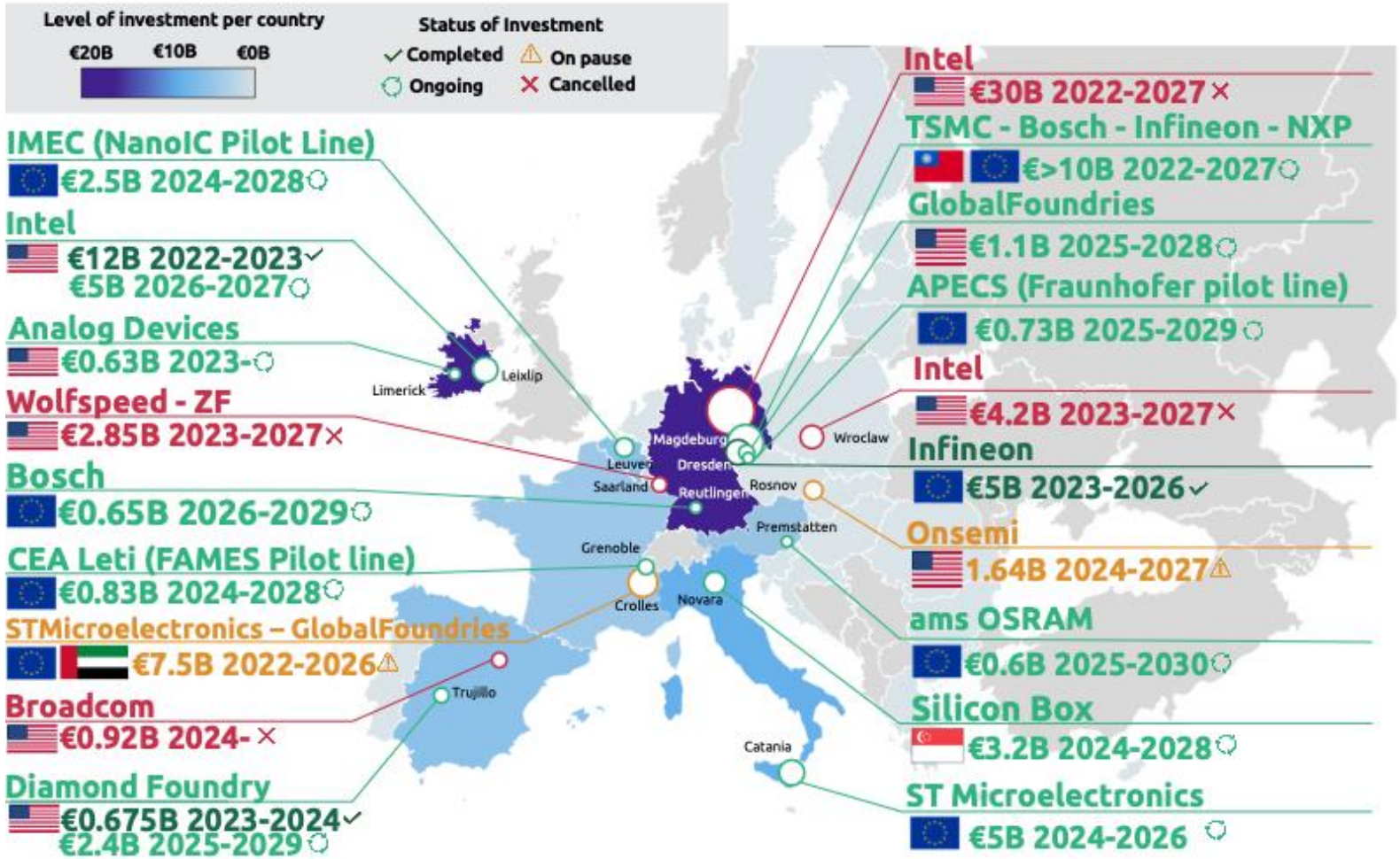
- ✓ Actionable data to help the EU Commission identify potential areas for cooperation.
- ✓ Stronger foresight and **forward-looking scenarios.**
- ✓ Evidence-based recommendations that could:
  - **Enhance** research collaboration
  - **Strengthen** the EU's industrial position in the global semiconductor value chain.

To learn more about the baseline of the ICOS² economic intelligence analysis, please refer to the ICOS reports





Investments in the EU
Status in October 2026



Mixed Investment Trends in Europe in 2026

- Rollout of the pilot lines underway
- Intel announced a new €5B investment in Ireland
- GF announced a new €1.1B investment in Dresden
- Broadcom cancelled its planned €850M back-end factory in Spain
- Onsemi is cutting around 200 jobs at its main Czech plant in Roznov

Upcoming results from the economic intelligence in February 2027

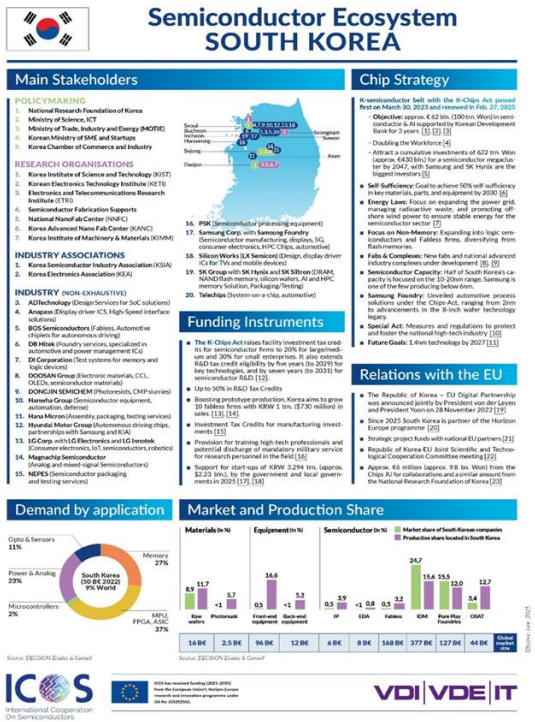
Data on the global semiconductor value chain

- Mapping of key actors across the value chain
- Trade flows
- Market and Production shares
- National Strategies
- Ongoing investments
- Semiconductor consumption

Together, these data allow us to position the EU and third countries within the semiconductor ecosystem, carry out a SWOT analysis for each, and provide recommendations to the EU.

Factsheets – Understanding the landscape of leading semiconductor countries

ICOS



- ✓ **Analysis** of semiconductor ecosystems in China, South Korea, Japan, India, Singapore, Taiwan, and the USA
- ✓ Identification of **cooperation opportunities** to shape the European global semiconductor strategy
- ✓ Insights compiled based on **key project outcomes** and **feedback from key players** in the respective countries

ICOS²

Updated Factsheets Release in June 2027

Update and Upgrade

- ✓ Map of major Investments
- ✓ Existing Cooperation Agreements
- ✓ Key Strength and Weaknesses
- ✓ Trade Flows with EU

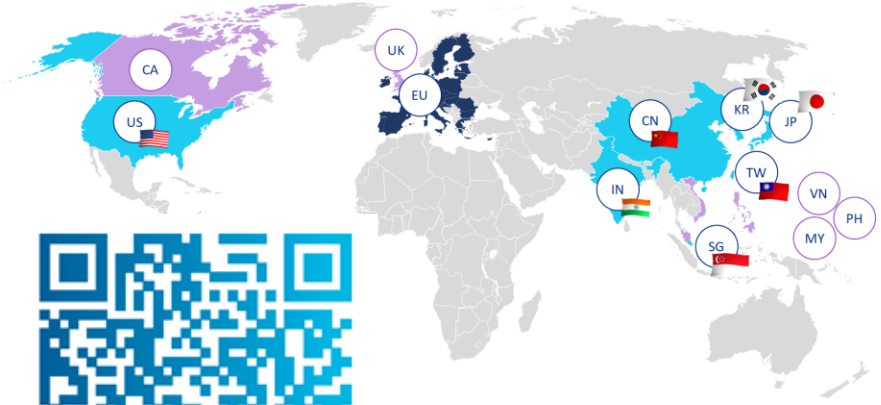
New Factsheets Release in June 2028

5 New Country Factsheets

- ✓ Canada, Vietnam, Malaysia, Philippines, and the UK

Key Message: Benchmarking of non-EU cooperation countries. Designed as a door opener for future engagement.

Using factsheets



Download
https:// icos-semiconductors.eu/other-outcomes/factsheets

1. **Discover new markets and partners**

✓ Understand foreign ecosystems / Identify and relevant partners

2. **Identify technology and R&D synergies**

✓ Discover complementarities & Identify opportunities

✓ Connect European expertise with global innovation ecosystem

3. **Make informed strategic decisions**

✓ Understand national strategies and funding opportunities

✓ Assess cooperation frameworks and existing partnerships

✓ Strengthen Europe's international positioning and supply-chain resilience

Key Message: Know the ecosystem. Find the partners. Create cooperations.

ICOS² addresses the critical need for **evidence-based policy recommendations** for the European Commission and Member States on **strategic international cooperation** with leading semiconductor nations

INPUTS



€ 3M EU budget
Expert consortium
Commision mandate

ACTIVITIES



Global semiconductor supply chain mapping
Policy & ecosystem analysis
Workshops & events
Stakeholder consultations

OUTPUTS



7 in-depth reports & briefs
1 Global cooperation roadmap
2000 stakeholders engaged

POTENTIAL OUTCOMES



Recommendations into EC policy
International dialogues influenced & joint R&I projects catalysed

IMPACTS



Better targeting of Chips Act & HEU funding
Improved EU global partnerships & standarisation influence
Long-term contribution to EU tech autonomy

Let's stay connected

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ICOS² - International Cooperation on Semiconductor Innovation and Supply Chain

Visit the website

https://icos-squared.eu/

Contact us by email

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Thank you

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