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NOTE

From: General Secretariat of the Council
To: Delegations
Subject: Chips Diplomacy Support Initiative
- Information from the European Union Institute for Security Studies
(EUISS)

Following the meeting of the Working Party on Telecommunications and Information Society on 19 February 2026, delegations will find in Annex the presentation made by the European Union Institute for Security Studies (EUISS)¹.

¹ This document contains a presentation by an external stakeholder and the views expressed therein are solely those of the third party it originates from. This document cannot be regarded as stating an official position of the Council. It does not reflect the views of the Council or of its members.

euiss European Union
Institute for Security Studies

 **CHIPS
DIPLOMACY**
SUPPORT INITIATIVE

CHIPDIPLO-presentation for Telecom Working Party

By Joris Teer, EUISS and CHIPDIPLO, 18-Feb-2026



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of the European Union

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Overview



7 industry webinars



3 dialogues,
1 table-top exercise



4 public conferences



5 policy papers



An **interactive map** of the EU ecosystem



Regular **briefings and updates to the EC**



An ambitious **360-degree communication strategy**

AUTONOMY OR INDISPENSABILITY? IDENTIFYING THE EU'S SEMICONDUCTOR LODESTAR

CHIPS DIPLOMACY SUPPORT INITIATIVE (CHIPDIPLO) POLICY PAPER 2
(PUBLICATION 18 DECEMBER)

BY JORIS TEER (EUISS), RICCARDO BOSTICCO (CSDS), AND ANTONIO
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What should be the EU's goal?

“Resilience” and “security of supply” =>
Autonomy?

“Competitiveness” and “innovation” =>
Indispensability?

European Chips Act (2023) – 20% of global share
54 MEPs letter to Commission (2025)
Semicon Coalition Declaration (2025)

Setup of the scenarios exercise

1. Goal: Help EU craft targeted, realistic and impactful semiconductor policies
2. Delphi-method: Collective judgment (of 30+ semicon ecosystem representatives and approx./ 18 EU, US, TW, JP thinktank experts, policymakers)
3. Pre-event / post-event survey + Full Day Chatham House Discussion / "reality check" dialogue
4. Achievability, desirability, effectiveness (twelve questions)
5. Four Scenarios Setting: 2035

Scenario 1: A European Semiconductor Fortress —

Full Autonomy, But No Indispensability

Scenario 2: Fortified European critical sectors –

Guaranteed five-year semiconductor supply for vital industries

Scenario 3: Allied Autonomy, European

Indispensability — Moving Semiconductor Bottlenecks Out of China

Scenario 4: Continent of Chokepoints —

Indispensable Europe in a Coalition of the Indispensable

Table 2 • EU semiconductor ecosystem views on the EU's 2035 semiconductor future: Post-dialogue survey outcomes

Survey Question	Scale	Scenario 1: European Semi- conductor Fortress	Scenario 2: Fortified European Critical Sectors	Scenario 3: Allied Au- tonomy; EU Indispensa- bility	Scenario 4: Continent of Choke Points
Q1. Achievability, meaning likelihood that Scenario X is a reality by 2035	1 = Totally unachievable 10 = Entirely achievable	1.8	4.3	7.3	6.6*

Table 2 • EU semiconductor ecosystem views on the EU's 2035 semiconductor future: Post-dialogue survey outcomes

Survey Question	Scale	Scenario 1: European Semiconductor Fortress	Scenario 2: Fortified European Critical Sectors	Scenario 3: Allied Autonomy; EU Indispensability	Scenario 4: Continent of Choke Points
Q1. Achievability, meaning likelihood that Scenario X is a reality by 2035	1 = Totally unachievable 10 = Entirely achievable	1.8	4.3	7.3	6.6*
Q2.4 Desirability, meaning whether Scenario X is in the EU's interest	1 = Entirely opposed to the EU's interests; 10 = Entirely in line with the EU's interests	3.1	3.6	7.3	4.6

**Table 2 • EU semiconductor ecosystem views
on the EU's 2035 semiconductor future:
Post-dialogue survey outcomes**

Q3a. Effectiveness(i), meaning whether the EU's critical state functions and commercial industries are protected against semiconductor supply interruptions, if Europe faces...					
Q3a. major geopolitical crisis events (average)	1 = Not at all protected 10 = Entirely protected	5.4	4.5	4.6	3.2
Q3.1 a Chinese export embargo (including CRM / legacy chips)	1 = Not at all protected 10 = Entirely protected	5.6 *	4.6	5.3	3.5
Q3.3 a US export embargo (including of SME and SME parts / chip designs)	1 = Not at all protected 10 = Entirely protected	5.5 *	4.6	4.5	3.2
Q3.5 a war in the Taiwan Strait	1 = Not at all protected 10 = Entirely protected	5.3 *	4.3	4.4	2.9
Q3.7 a war on the Korean Peninsula	1 = Not at all protected 10 = Entirely protected	5.3	4.6	4.1	3.1

Survey Question	Scale	Scenario 1: European Semi- conductor Fortress	Scenario 2: Fortified European Critical Sectors	Scenario 3: Allied Au- tonomy; EU Indispensa- bility	Scenario 4: Continent of Choke Points
Q3b. Effectiveness(ii), meaning EU ability in Scenario X to...					
Q3b. deter major geo- political crisis events (average)	1 = Extremely unlikely 10 = Extremely likely	3.1	2.7	3.9	3.5
Q3.2 deter a Chinese export embargo (including of CRM / legacy chips)	1 = Extremely unlikely 10 = Extremely likely	3.7	2.9	4.5	3.9
Q3.4 deter a US export embargo (in- cluding on SME and SME parts / chip	1 = Extremely unlikely 10 = Extremely likely	4.2	3.4	4.8	4.0
Q3.6 deter China from starting a war in the Taiwan Strait	1 = Extremely unlikely 10 = Extremely likely	2.2	2.2	3.2	3.1
Q3.8 deter North Korea / China from starting a war on the Korean Peninsula	1 = Extremely unlikely 10 = Extremely likely	2.2	2.2	3.0	3.1*

How to achieve Scenario 3: Allied Autonomy, European Indispensability? Partner policies

1. Strategic shift toward demand-side tools that reshape markets rather than relying on costly, distortionary subsidies and state support, through:
 1. Joint economic security standards: European- and partner-content requirements, joint tariffs and aligned procurement rules.
 2. Coordinated export controls, investment screening, and research security policies to maintain the coalitions technological edge.
2. Selective domestic support to undo China's current chokepoints (e.g., CRM) or future ones (e.g., legacy chips, chemicals).
3. Within the coalition, Europe must avoid overreliance on any single partner through reverse dependencies and reciprocal access agreements (0-for-0 tariffs), including the US.

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SEMICONDUCTORS: EUROPEAN VIEWS ON FOUR 2029 TECH TRANSFER REGIMES SCENARIOS

CHIPS DIPLOMACY SUPPORT INITIATIVE (CHIPDIPLO) POLICY PAPER 1
(PUBLICATION SEPTEMBER)

BY JORIS TEER (EUISS)

**Table 4 • EU industry and RTO views
on four 2029 technology transfer regimes:
Post-workshop survey outcomes**

Survey Question	Scale	Scenario 1. Expanding Extrater- ritorial Patchwork	Scenario 2. Fortress Europe	Scenario 3. CoCom2.0	Scenario 4. US-China Grand Bargain
Q1. Achievability, meaning likelihood that regime is a reality by January 2029	0 = Extremely unlikely 10 = Extremely likely	7.89	3.22	3.44	4.89
Q1a. Support of NATO allies & EU partners around the world for regime	0 = No support 10 = Complete support	4.00	3.67	5.11	3.22
Q2a. Effectiveness(I), meaning likelihood that regime prevents strengthening China's armed forces	0 = Extremely ineffective 10 = Extremely effective	4.44	4.00	5.00	2.55
Q2b. Effectiveness(II), meaning likelihood regime prevents strengthening China's industrial dominance	0 = Extremely ineffective 10 = Extremely effective	5.11	5.00	5.11	2.78

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Q2b. Effectiveness(II), meaning likelihood regime prevents strengthening China's industrial dominance	0 = Extremely ineffective 10 = Extremely effective	5.11	5.00	5.11	2.78

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Survey Question	Scale	Scenario 1. Expanding Extrater- ritorial Patchwork	Scenario 2. Fortress Europe	Scenario 3. CoCom2.0	Scenario 4. US-China Grand Bargain
Q3. Desirability, meaning whether the regime is in the EU's interest	0 = Entirely in opposition to EU interests 10 = Entirely in line with EU interests	2.78	6.44	5.55	3.00
Q3a. Level of threat to EU industry and RTO competitiveness	0 = Poses severe threats to competitiveness 10 = Poses no threats	2.89	5.22	4.00	3.44

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Survey Question	Scale	Scenario 1. Expanding Extrater- ritorial Patchwork	Scenario 2. Fortress Europe	Scenario 3. CoCom2.0	Scenario 4. US-China Grand Bargain
Q3b. Vulnerability of EU and EU Member States to retaliation by China	0 = Extremely vulnerable 10 = Not at all vulnerable	4.22	5.00	4.44	4.67
Q3c. Leverage that regime provides in negotiations with the US on future technology transfer restrictions	0 = No leverage whatsoever 10 = Far greater leverage	2.11	4.89	3.67	2.56

About us

The European Union Institute for Security Studies (EUISS) is the Union's Agency analysing foreign, security and defence policy issues. Its core mission is to assist the EU and its member states in the implementation of the Common Foreign and Security Policy (CFSP), including the Common Security and Defence Policy (CSDP) as well as other external action of the Union.

The Institute was set up in January 2002 as an autonomous agency under Council Joint Action 2001/554 [now regulated by Council Decision 2014/75/CFSP] to strengthen the EU's analysis, foresight, and networking capacity in external action. The Institute also acts as an interface between the EU institutions and external experts – including security actors – to develop the EU's strategic thinking. The EUISS is now an integral part of the structures that underpin the further development of the CFSP/CSDP.

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