

Strategic Autonomy or Strategic Indispensability? Identifying the EU's Semiconductor Lodestar CHIPDIPLO Dialogue

Event | 26 June 2025 | Eindhoven, The Netherlands



CONCEPT

The European Union (EU) Chips Act identifies strengthening "innovation", "resilience" and "security of supply" as key objectives. But which of these highly divergent goals is attainable? Many EU policy documents continue to put strategic autonomy and technological sovereignty front and centre, meaning the ability of the EU to act autonomously and without being dependent on other countries. The European Commission's 2030 target to produce 20% of all semiconductors in Europe reflects this reasoning. However, it is doubtful whether the EU can achieve any autonomy in semiconductors, considering the value chain's highly specialised and globalised character. Perhaps "security of supply" can be achieved by aligning policies with G7 and other partners. But how "likeminded" is this group, now that President Trump has returned to the White House? Can the EU ensure the supply of semiconductors to its most critical sectors during a geopolitical crisis?

Some have argued that strategic indispensability, meaning possessing capabilities that nobody else has, should instead be the EU's goal. The reasoning goes: as long as the EU maintains the dependencies of third parties on European technologies, rivals will refrain from weaponising supply chains. But how should European institutions and member states engage with industry in this process of strategic indispensability? What EU and member state policies can help European companies to become globally competitive – and preferably even vital to global semiconductor production? Complicating these difficult questions are the consequences of geopolitical and trade measures taken by the Chinese and the US governments, including those related to export controls and tariffs.

In June 2025, the CHIPDIPLO consortium, in partnership with Brainport Development, brought together 40 industry executives and think tank experts to discuss what the end goal of EU semiconductor policy should be: strategic autonomy or strategic indispensability. During this Delphi-workshop in Eindhoven, the Netherlands, participants jointly assessed the EU's strengths and weaknesses in the semiconductor sector. Specific attention was paid to value chain chokepoints, overdependencies, vulnerabilities and third country industrial policies that threaten the supply of semiconductors to the EU.