



6C model Report



6C strategic analysis

EUSEMICON2035

ACTOR	European Union
STRATEGIC COUNTERPART	China
OBJECTIVE	European Semiconductor Strategic Autonomy by 2035
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Premise

The scenario concerns semiconductor competition and Europe's effort to achieve strategic technological autonomy by 2035. The European Union has strengths in manufacturing equipment, industrial chips, power electronics and research, but depends on external suppliers for advanced logic, large-scale foundry capacity and parts of chip design. China is a consequential counterpart through its industrial scale and role in selected materials and supply-chain flows; it also faces constraints in some advanced technologies. The global industry is specialized and interconnected, while the United States, Taiwan and South Korea hold important positions. The objective is to reduce critical vulnerabilities durably, not eliminate all imports.

Context analysis

Presentation

The European Semiconductor Strategic Autonomy by 2035 scenario concerns a strategic contest over the capabilities, inputs and relationships that make semiconductor supply dependable. It is not a realistic prospect for Europe to reproduce every stage of a global industry built on deep specialization and cross-border exchange. The central issue is whether the European Union can durably reduce its most consequential vulnerabilities while retaining access to international expertise and suppliers, and without undermining innovation, efficiency or the competitiveness of industries that depend on chips.

Semiconductors connect research and design to wafer fabrication, assembly, testing and packaging. Each stage depends on specialized equipment, materials, software, intellectual property and expertise, and a product may cross borders more than once as it moves through production. A disruption at one point can therefore spread beyond the immediate supplier: shortages can affect logistics, production and industries such as automotive, energy, telecommunications, healthcare, defence and artificial intelligence. The strategic importance of a dependency varies with the chip's use, the availability of substitutes, supplier concentration and the time needed to restore a critical function. A broad increase in domestic production would not, by itself, show that the most damaging dependencies had been reduced.

The European Union enters this situation with substantive strengths. European firms have important positions in semiconductor manufacturing equipment, industrial chips and power electronics, and the Union has a strong research base and established industrial customers. Its automotive and industrial sectors can support specialized ecosystems, while common institutions and an established semiconductor policy framework provide a basis for cross-border coordination. The Chips Act has created shared infrastructure and governance mechanisms and helped mobilize investment and collaboration. Public evaluations also report stakeholder confidence in the strategic direction and broad recognition that a European response to geopolitical, technological and economic pressures is necessary.

These assets are meaningful, but they do not amount to a complete or integrated European chain. The Union remains dependent on external suppliers for advanced logic manufacturing, large-scale foundry capacity, important parts of chip design and other critical inputs. Manufacturing equipment and research strengths provide leverage and technical depth, yet they do not substitute for externally controlled design software, intellectual property, materials, packaging or specialized know-how. The European

position is consequently differentiated: it is established in several important activities while exposed in other stages that can determine access to advanced computing and other strategically sensitive applications.

Independent scrutiny of the earlier Chips Act describes both progress and persistent gaps. The framework was established quickly, and capacity, research infrastructure and coordination have advanced. At the same time, the European Court of Auditors found weaknesses in preparation, implementation and monitoring, and judged the original production-share ambition unlikely to be achieved under the conditions it reviewed. Its findings point to a difficult transition from research and pilot facilities to reliable, commercially sustainable production at scale. Announced investment, completed construction, qualified output and durable capacity are distinct outcomes; one should not be mistaken for another. The Commission's June 2026 Chips Act 2.0 proposal likewise treats important dependencies and implementation challenges as unresolved. It is evidence of current policy attention, not proof that its proposed measures or possible projects have already delivered results.

Several structural constraints help explain this gap. Semiconductor facilities require large, long-lived investments, specialist suppliers and skilled workers, dependable energy and water, and sufficient demand over time. Permitting and investment processes can be lengthy, while technological change may alter the value of a facility before it reaches full operation. European reviews also identify limited later-stage finance, fragmented demand, low volumes in some sectors and insufficient coordination among purchasers as obstacles to commercial scale. Energy costs, grid reliability, water access, environmental requirements and competition for engineers and technicians further shape where capacity can operate and whether it can remain viable.

Coordination within the Union is both an asset and a source of friction. EU institutions can provide common rules and shared facilities, and coordinated action can pool resources across borders. But member states differ in fiscal capacity, industrial priorities and existing ecosystems. Decisions about where facilities are located and how costs, benefits and technology ownership are shared can produce competing national interests. Audit findings about uneven and delayed implementation, fragmented national measures and limited visibility over some investment reinforce the distinction between having a common framework and achieving consistently coordinated results. The Union's current capacity to act is therefore real, but conversion of that capacity into aligned, durable industrial outcomes remains uneven.

China is a consequential counterpart because of its industrial scale, domestic demand, state-backed semiconductor ambitions and position in selected material-processing and supply-chain activities. Its licensing and export-control measures demonstrate state capacity to regulate particular flows and create leverage where alternatives are limited. This is a specific asymmetry, not evidence that China controls the entire semiconductor chain or that every measure is directed at the European Union. China also faces constraints in selected advanced technologies, and its influence is not uniform across

stages. Its relationships with the Union combine commercial and supply-chain interdependence with competition and economic-security tensions. They are highly consequential without being uniformly hostile. European autonomy is relevant to China through its effect on supply-chain positions and technology access, but the available evidence does not establish a single, unified Chinese intention to prevent it.

The wider setting further limits any simple EU-China comparison. Taiwan's central role in advanced contract manufacturing creates a concentration risk with potential consequences for European industry well beyond direct chip shortages. Cooperation with Taiwanese firms is also commercially and technologically valuable. South Korea has important memory and advanced-manufacturing capabilities, while Japan is significant in several materials and equipment markets. The United States combines leading design capabilities, substantial industrial support, technology-transfer restrictions and security partnerships. Those ties can support European security and access while also constraining European choices. Europe's equipment position can itself provide bargaining power, but it exposes firms to export controls, trade restrictions and changes in foreign demand. Supply resilience thus depends on a web of partners and constraints, not only on the balance between the Union and China.

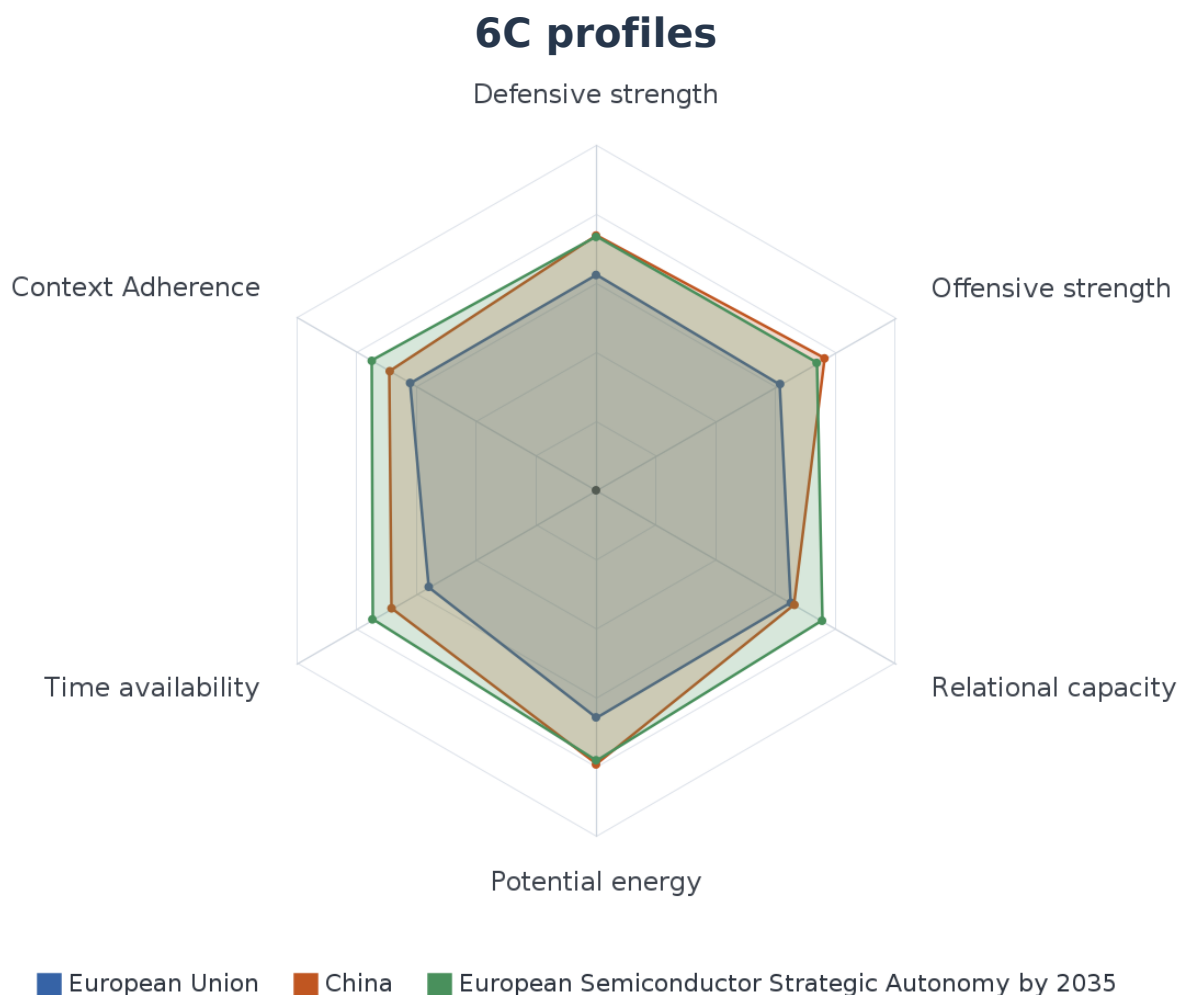
The Union treats semiconductor autonomy as a highly important objective, as shown by its policy framework and continued attention to unresolved dependencies. Its stated meaning is selective rather than autarkic: durable reduction of critical vulnerabilities, while preserving international specialization and downstream competitiveness. The knowledge available supports a requirement for strong protection at consequential bottlenecks, connected capabilities that can support essential functions, sustained coordination among institutions, industry, research and users, and dependable links with international partners. It does not imply that every stage must be replicated within Europe. More production in segments with little bearing on critical vulnerabilities would not necessarily advance the objective as much as stronger capability or reliable access in a small number of bottlenecks.

This objective is partly compatible with continued trade and diversified supply, but not free of conflict. A stronger European position can coexist with international suppliers and partnerships, yet greater European control over selected capabilities may alter existing supplier leverage. Partnerships can diversify access and support learning, but they may reproduce dependency if essential knowledge, production decisions or intellectual property remain outside European control. The strategic balance is between dependable access and meaningful European capacity, rather than between complete isolation and unrestricted dependence.

Timing is a central feature of the current situation. The 2035 horizon leaves some room for structural change, but long construction, qualification and investment cycles narrow the practical freedom to sequence choices. Technological progress and shifts in demand can move faster than facilities and permitting processes, while geopolitical decisions may reshape access before new capacity is operational. Some infrastructure, skills and

technology choices are also difficult to reverse once established. Europe's timing position therefore combines a defined period for adjustment with limited flexibility and exposure to events that may close options. The objective itself requires enough room to adapt and sequence change without losing essential access; the present field does not guarantee that room.

The main unresolved distinction is how "strategic autonomy" is to be defined in operational terms by 2035: which semiconductor stages and inputs count as essential, and how much of the outcome rests on European control versus diversified, dependable access. The stated goal and the need for selective vulnerability reduction are clear, but different choices of priority segments or autonomy threshold would change what counts as adequate progress. This uncertainty does not erase the strategic direction. It limits how precisely the breadth of the required European capability can be described. Overall, the scenario is a contest between a strong but uneven European industrial and institutional base and a complex, interdependent global system in which China holds selected forms of leverage, other partners remain essential, and the conversion of policy, research and investment into sustainable capacity is still in progress.



Scale 0.01-5.00. Missing values are not plotted.

6C condition scale anchors: 0.01 = lower end; 3.00 = configured neutral reference; 5.00 = upper end.
Higher values indicate more of the named condition. These are calibrated assessment coordinates, not probabilities or physical measurements.

Players

European Union

Condition	Value
Defensive strength	3.12
Offensive strength	3.08
Relational capacity	3.26
Potential energy	3.29
Time availability	2.80
Context Adherence	3.11

Condition explanations

Defensive strength (3.12)

The EU has an established policy framework and meaningful industrial assets, but continuing external dependence in advanced production and design limits its present ability to defend semiconductor supply and autonomy across the full chain. European industrial strengths coexist with concentrated external dependencies in critical semiconductor inputs, limiting protection from supplier concentration. International specialization and partner links provide options, but advanced production and design dependencies constrain substitution across essential stages. ^{[1], [2], [3], [5]}

Offensive strength (3.08)

European policy and industry provide a basis to expand production and retain important positions, but independent review finds that current implementation and investment are unlikely to deliver the original 2030 share ambition. Equipment, research and downstream industry create real value-chain foundations, but advanced-stage dependencies interrupt integration. Established international links support resource diplomacy, though no privileged producing-country arrangement is identified. ^{[1], [2], [3], [5]}

Relational capacity (3.26)

The Union can coordinate through common institutions, policy frameworks and economic-security instruments. The need for further implementation and demand coordination shows that this capacity is meaningful but not frictionless. EU institutions and international partnerships support coordination, although member-state differences constrain a uniformly durable approach. Common institutions and economic-security instruments enable coordination, while member-state differences and implementation gaps limit it. ^{[1], [2], [3], [5]}

Potential energy (3.29)

The EU has a substantial research, industrial and institutional base and has mobilized policy support, but audit findings on investment sufficiency and production scale constrain the estimate of currently available, convertible capacity. Substantial public and private semiconductor investment is mobilized, but audit findings identify limits in scale and conversion to capacity. Research, equipment and industrial-chip strengths establish technical know-how, though not across all semiconductor stages. ^{[1], [2], [3], [5]}

Time availability (2.80)

The 2035 horizon provides usable time for adjustment, but the long development cycles of semiconductor capacity, current dependencies and continuing supply-chain uncertainty reduce the EU's practical sequencing freedom and make timing windows less secure. The EU has usable time to adjust, but concentrated dependencies and uncertain disruption windows limit its timing freedom and adaptive room. A defined 2035 horizon leaves options, but geopolitical shifts and long investment cycles limit durable timing freedom. ^{[1], [2], [3], [5]}

Context Adherence (3.11)

Semiconductor resilience and technological capacity fit the EU's stated economic-security and industrial priorities. The continuing reliance on external advanced production and the implementation gaps identified by reviewers show that present capabilities do not yet fully fit those priorities. The stated aim reduces vulnerabilities without eliminating imports, fitting the EU's interdependent industrial position. The objective balances resilience with downstream competitiveness; energy, demand and investment constraints make cost fit uneven. ^{[1], [2], [3], [5]}

Context relations

Relation with China

Value: 4.50

The relationship is highly consequential and mixed: supply interdependence and selected Chinese leverage coexist with competition and EU exposure. ^{[1], [2], [3], [5]}

Relation with the objective European Semiconductor Strategic Autonomy by 2035

Value: 5.00

EU semiconductor policy and continued attention to unresolved dependencies establish autonomy as a highly important current objective. ^{[1], [2], [3], [5]}

China

Condition	Value
Defensive strength	3.69
Offensive strength	3.82
Relational capacity	3.32
Potential energy	3.97
Time availability	3.42
Context Adherence	3.45

Condition explanations

Defensive strength (3.69)

China's industrial position and authority to license or restrict selected exports provide substantial means to protect strategic supply-chain interests. The available sources do not establish equivalent control across every semiconductor stage. China's industrial scale and selected critical-material processing provide protection, although not across the full semiconductor chain. China has a strong position in selected materials processing, but this does not establish control across every processing bottleneck. ^{[1], [6], [7]}

Offensive strength (3.82)

China has a consequential semiconductor and materials position and demonstrated state capacity to regulate selected supply-chain flows. The estimate is limited to those grounded strengths and does not assume dominance across the entire value chain. China has substantial industrial capacity in selected stages, although advanced-technology constraints limit its reach. Export controls demonstrate state regulatory leverage over selected supply-chain flows, not universal control. ^{[1], [6], [7]}

Relational capacity (3.32)

China's importance to international supply chains gives it consequential relationships and channels of influence. The available evidence also shows economic-security tensions, and is insufficient to characterize its current capacity to coordinate or reassure the EU across this field. Industrial scale and policy links connect China to producers and processors, though specific relationship durability is uncertain. Industrial policy and state authority connect public priorities to semiconductor activity, though effectiveness across all stages varies. ^{[1], [6], [7]}

Potential energy (3.97)

China's consequential industrial and critical-material positions support a high assessment of mobilizable supply-chain resources. This is a broad structural estimate, not a claim of self-sufficiency in every advanced semiconductor input or technology. China's industrial and critical-material position plus export licensing provide substantial regulatory and market leverage in selected areas. State-backed investment and domestic scale provide substantial resources, without implying unlimited or evenly converted capital. ^{[1], [6], [7]}

Time availability (3.42)

China's industrial position and ability to impose licensing controls provide some room to sequence and adjust supply-chain decisions. Public information cited here does not establish its reaction speed or the reversibility of its timing options across the whole semiconductor chain. China's current industrial position and policy focus preserve some timing options, though constraints limit flexibility across the chain. Long project cycles limit China's usable timing room, while existing industrial capacity and policy focus retain some adaptability. ^{[1], [6], [7]}

Context Adherence (3.45)

China's industrial and material-chain position fits its ability to act in selected semiconductor supply-chain areas. The assessment is limited because the sources do not provide a complete comparison of that position across all stages. China participates in an interdependent chain while pursuing selected self-reliance, though advanced constraints limit full autonomy. China's export-control capacity is demonstrated, but interaction with broader trade and legal constraints makes overall fit uneven. ^{[1], [6], [7]}

Context relations

Relation with European Union

Value: 4.50

The relationship is highly consequential for China, combining interdependence with competition and selected regulatory leverage; it is not uniformly hostile. ^{[1], [6], [7]}

Relation with the objective European Semiconductor Strategic Autonomy by 2035

Value: 3.50

European autonomy matters to China through supply-chain positions and technology access, but evidence does not establish a unified intent to oppose it. ^{[1], [6], [7]}

Objectives

European Semiconductor Strategic Autonomy by 2035

Condition	Value
Defensive strength	3.67
Offensive strength	3.69
Relational capacity	3.78
Potential energy	3.91
Time availability	3.74
Context Adherence	3.75

Condition explanations

Defensive strength (3.67)

Credible autonomy requires strong protection against supply disruption or external leverage in the semiconductor capabilities defined as essential. The exact scope is not specified, so the required level is high but not maximal. The objective requires dependable alternatives or access where disruption would threaten critical functions; scope determines the breadth. Credible autonomy requires strong targeted protection from concentrated suppliers at consequential bottlenecks, not every input. ^{[1], [2], [3], [4]}

Offensive strength (3.69)

The objective requires enough capacity to develop and scale strategically important European semiconductor capabilities, but does not imply that every segment must displace all external producers. Selective processing capacity is required at consequential bottlenecks, not as full duplication of the global chain. Connected capabilities at selected stages are needed to reduce vulnerabilities rather than merely increase aggregate production. ^{[1], [2], [3], [4]}

Relational capacity (3.78)

A credible 2035 outcome requires sustained coordination among EU institutions, member states, industry and trusted supply partners, particularly because semiconductor capabilities and inputs span multiple jurisdictions. The cross-border chain and EU member-state differences make durable partner coordination central to credible attainment. Credible attainment requires coordination across EU industrial, research, trade and security policy despite member-state variation. [1], [2], [3], [4]

Potential energy (3.91)

The objective calls for substantial investment, research, production capacity and supply-chain depth. Independent reviews identify resource and scale challenges, supporting a high required level while leaving room for specialized external links. Specialized knowledge and skilled expertise are necessary for durable capabilities across selected semiconductor stages. Substantial sustained investment is required for selected semiconductor capabilities, but the appropriate level remains bounded by viable demand. [1], [2], [3], [4]

Time availability (3.74)

Credible attainment by 2035 requires sufficient timing room to sequence long industrial investments and adapt to external supply changes without losing key options. This is a requirement for usable temporal flexibility, not a score of urgency. Credible attainment needs substantial usable timing room and adaptive responsiveness to address dependencies before disruption closes options. Long processing and qualification cycles require substantial timing flexibility to preserve options and adapt as technology changes. [1], [2], [3], [4]

Context Adherence (3.75)

The objective requires close fit between EU capabilities and actual semiconductor needs, industrial economics, institutional coordination and supply-chain constraints. Broad self-sufficiency is not assumed to be necessary. The stated objective requires reduced critical vulnerability while preserving international interdependence, efficiency and competitiveness. The objective explicitly preserves productive efficiency and downstream competitiveness, making cost fit a central requirement. [1], [2], [3], [4]

Context relations

Objective shareability/conflict degree

Value: 4.00

The objective is partly shareable through diversified trade, but greater European control over selected capabilities can conflict with supplier leverage. [1], [2], [3], [4]

Reference-context evidence sources

Source markers in the assessment and relationship commentary refer only to explicit recorded evidence mappings. The introductory context narrative is a synthesis of the reference case and is not presented as sentence-level source attribution.

1. Council of the European Union. The EU chips industry
2. European Commission. Proposal for the Chips Act 2.0
3. European Court of Auditors. Special report 12/2025: The EU's strategy for microchips
4. European Parliamentary Research Service. The European Chips Act: Lessons learnt from 3 years of implementation
5. Council of the European Union. European economic security
6. Ministry of Commerce of the People's Republic of China. Announcement No. 18 of 2025 on export controls for certain medium and heavy rare-earth-related items
7. Ministry of Commerce of the People's Republic of China. Announcement on China's 2025 dual-use export-control measures

Executive summary

The 6C Model compares the structured context with 60 strategic motors and identifies the leading comparative-fit directions for interpretation. These positions are not predictions of success and do not replace strategic judgment.

The leading directions point to a staged effort to reduce Europe's exposure to critical semiconductor bottlenecks without trying to reproduce the whole global chain. The central challenge is timing: useful alternatives take years to build and qualify, while technology, demand and trade rules can change sooner. The comparative pattern therefore favors using the time available to create options before choices become harder to reverse. Small, strategically relevant gains and focused trials support that logic; they can build knowledge and capability before larger commitments. Renewal means directing established strengths in equipment, research, industrial chips and power electronics toward changing needs, not abandoning them wholesale. Preventive safeguards, including diversified access and crisis preparation, can protect supply while alternatives mature, but cannot replace them. The parts of the set overlap in building resilience, yet differ in role: trials should inform choices, renewal should redirect them, and safeguards should bridge the transition. Scale should follow credible demand, qualified production and durable operating conditions. The aim is fewer critical single points of failure and more European control over consequential capabilities, while preserving useful international ties and downstream competitiveness.

What would change the strategic choice?

The broad direction is not easily displaced by modest changes in several individual assessments, though the emphasis among leading strategies can shift. A different direction appears in tested cases if Europe's ability to coordinate institutions, member states and industry is judged materially weaker, or if credible attainment is judged to require substantially more coordination. The comparison then favors shaping relationships and rebalancing dependencies. A higher requirement that European capabilities fit real supply-chain needs can also change the leading direction. Reopen the assessment if evidence changes the picture of European coordination, the cooperation needed to achieve the objective, or the requirements for matching capacity to actual industrial and security needs. These are conditional findings from the tested variations, not forecasts.

Decision Robustness

This section checks how the strategic direction changes when one 6C assessment is varied at a time while the others stay fixed. It does not measure the probability of success. It shows which parts of the choice remain stable, which parts change emphasis, and which conditions can make a different strategic family take the lead. The six 6C conditions are Defensive Strength, Offensive Strength, Relational Capacity, Potential Energy, Time Availability and Context Adherence. A strategic family is a broader action logic grouping related strategic mechanisms.

18 6C variables considered | 111 tests, one variable at a time

Additional stress tests: 48 extra executions are excluded from the main test counts; some extend beyond the plausible range.

STARTING CONFIGURATION

Leading strategic motors 59 · 12 · 42 · 44 · 48

Opportunistic timing and context exploitation · Fortification and consolidation

RESULTS ACROSS 111 TESTS

26/111 Leading family stays the same

22/111 only the order changes · 4 /111 changes inside the same family

The same strategic family remains in the lead.

69/111 Leading mix changes

The mix of leading families changes, but at least one family from the starting configuration remains.

16/111 Different leading strategic family

A different strategic family becomes the leading set.

STRATEGIC FAMILIES IN THIS CASE

Opportunistic timing and context exploitation: Uses timing, experimentation and emerging openings to exploit or reshape changing conditions.

Fortification and consolidation: Protects resources and gains by strengthening coherence, institutions, barriers and durable foundations.

Relational context shaping: Uses relationships, alliances, legitimacy, narratives and indirect leverage to reshape the context in which choices are made.

Indirect breakthrough and targeted force: Seeks leverage against a stronger position through indirect moves, concentration on critical points and selective sacrifice.

Dependency rebalancing and selective withdrawal: Reduces dependence and strengthens position through selective withdrawal, indirect pressure and deliberate trade-offs.

OBSERVED COMPOSITION CHANGES

European Union

6C condition: Defensive strength

Tested change: Toward the lower end of the recorded plausible range

Families retained: Fortification and consolidation

Families exiting: Opportunistic timing and context exploitation

Leading strategic motors: 48 · 53

Value calibration range: 2.36–3.93

Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.

European Union

6C condition: Defensive strength

Tested change: Toward the upper end of the recorded plausible range

Families retained: Opportunistic timing and context exploitation

Families exiting: Fortification and consolidation

Leading strategic motors: 59 · 42 · 44

	Value calibration range: 2.36–3.93 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Union 6C condition: Offensive strength Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 42 Value calibration range: 2.30–3.90 Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.
European Union 6C condition: Offensive strength Tested change: Toward the upper end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 42 · 44 Value calibration range: 2.30–3.90 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Union 6C condition: Relational capacity Tested change: Toward the lower end of the recorded plausible range	Families entering: Relational context shaping Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 58 · 42 Value calibration range: 2.43–4.04 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Union 6C condition: Relational capacity Tested change: Toward the upper end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 44 · 42 Value calibration range: 2.43–4.04 Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.
European Union 6C condition: Potential energy Tested change: Toward the lower end of the recorded plausible range	Families entering: Indirect breakthrough and targeted force Families retained: Opportunistic timing and context exploitation · Fortification and consolidation Leading strategic motors: 48 · 8 · 59 · 12 Value calibration range: 2.51–4.07

	Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Union 6C condition: Potential energy Tested change: Toward the upper end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 42 · 44 Value calibration range: 2.51–4.07 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Union 6C condition: Time availability Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 44 · 12 · 59 · 42 Value calibration range: 2.11–3.54 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Union 6C condition: Time availability Tested change: Toward the upper end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 44 · 12 Value calibration range: 2.11–3.54 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Union 6C condition: Context Adherence Tested change: Toward the lower end of the recorded plausible range	Families entering: Relational context shaping · Dependency rebalancing and selective withdrawal Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 58 · 12 · 50 · 54 · 26 · 59 Value calibration range: 2.26–4.00 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Union 6C condition: Context Adherence Tested change: Toward the upper end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 42 · 44 Value calibration range: 2.26–4.00

	Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
China 6C condition: Defensive strength Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 42 Value calibration range: 2.89–4.45 Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.
China 6C condition: Defensive strength Tested change: Toward the lower end of the recorded plausible range	Families entering: Fortification and consolidation Families retained: Opportunistic timing and context exploitation Leading strategic motors: 59 · 42 · 12 · 37 · 44 · 38 Value calibration range: 2.89–4.45 Relation to the value calibration range: This change appears only outside the range currently considered plausible for this assessment.
China 6C condition: Defensive strength Tested change: Toward the upper end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 Value calibration range: 2.89–4.45 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
China 6C condition: Offensive strength Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 44 · 12 · 42 Value calibration range: 3.06–4.54 Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.
China 6C condition: Offensive strength Tested change: Toward the upper end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 42 · 44 Value calibration range: 3.06–4.54 Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.

China 6C condition: Offensive strength Tested change: Toward the upper end of the recorded plausible range	Families entering: Fortification and consolidation Families retained: Opportunistic timing and context exploitation Leading strategic motors: 59 · 44 · 48 · 12 · 42 Value calibration range: 3.06–4.54 Relation to the value calibration range: This change appears only outside the range currently considered plausible for this assessment.
China 6C condition: Relational capacity Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 42 Value calibration range: 2.64–4.00 Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.
China 6C condition: Potential energy Tested change: Toward the upper end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 42 · 44 Value calibration range: 3.22–4.60 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
China 6C condition: Time availability Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 44 · 42 · 12 Value calibration range: 2.67–4.08 Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.
China 6C condition: Time availability Tested change: Toward the upper end of the recorded plausible range	Families retained: Fortification and consolidation Families exiting: Opportunistic timing and context exploitation Leading strategic motors: 48 · 53 Value calibration range: 2.67–4.08 Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.
China 6C condition: Context Adherence	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation

Tested change: Toward the lower end of the recorded plausible range	Leading strategic motors: 59 · 12 · 42 Value calibration range: 2.56–4.28 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Defensive strength Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 44 · 42 Value calibration range: 2.89–4.42 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Defensive strength Tested change: Toward the upper end of the recorded plausible range	Families retained: Fortification and consolidation Families exiting: Opportunistic timing and context exploitation Leading strategic motors: 48 · 53 Value calibration range: 2.89–4.42 Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Offensive strength Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 44 · 42 Value calibration range: 2.87–4.47 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Offensive strength Tested change: Toward the lower end of the recorded plausible range	Families entering: Fortification and consolidation Families retained: Opportunistic timing and context exploitation Leading strategic motors: 59 · 44 · 12 · 42 · 48 Value calibration range: 2.87–4.47 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Offensive strength Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 44 Value calibration range: 2.87–4.47

	Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Offensive strength Tested change: Toward the upper end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 42 · 44 · 12 Value calibration range: 2.87–4.47 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Relational capacity Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 44 · 42 Value calibration range: 2.99–4.54 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Relational capacity Tested change: Toward the lower end of the recorded plausible range	Families entering: Fortification and consolidation Families retained: Opportunistic timing and context exploitation Leading strategic motors: 59 · 12 · 44 · 42 · 48 Value calibration range: 2.99–4.54 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Relational capacity Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 44 · 42 Value calibration range: 2.99–4.54 Relation to the value calibration range: This change appears only outside the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Relational capacity Tested change: Toward the upper end of the recorded plausible range	Families entering: Relational context shaping Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 58 · 59 Value calibration range: 2.99–4.54 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.

European Semiconductor Strategic Autonomy by 2035 6C condition: Potential energy Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 44 · 42 Value calibration range: 3.11–4.64 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Potential energy Tested change: Toward the upper end of the recorded plausible range	Families entering: Indirect breakthrough and targeted force Families retained: Opportunistic timing and context exploitation · Fortification and consolidation Leading strategic motors: 48 · 8 · 59 Value calibration range: 3.11–4.64 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Time availability Tested change: Toward the lower end of the recorded plausible range	Families entering: Relational context shaping Families retained: Fortification and consolidation Families exiting: Opportunistic timing and context exploitation Leading strategic motors: 48 · 58 · 53 · 4 · 37 Value calibration range: 3.01–4.47 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Time availability Tested change: Toward the upper end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 44 · 42 Value calibration range: 3.01–4.47 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Context Adherence Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 12 · 44 · 42 Value calibration range: 2.95–4.51 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
	Families entering: Fortification and consolidation

European Semiconductor Strategic Autonomy by 2035 6C condition: Context Adherence Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Leading strategic motors: 59 · 42 · 44 · 12 · 48 Value calibration range: 2.95–4.51 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Context Adherence Tested change: Toward the lower end of the recorded plausible range	Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 59 · 44 · 42 Value calibration range: 2.95–4.51 Relation to the value calibration range: This change appears near the edge of the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Context Adherence Tested change: Toward the upper end of the recorded plausible range	Families entering: Relational context shaping Families retained: Opportunistic timing and context exploitation Families exiting: Fortification and consolidation Leading strategic motors: 58 · 12 Value calibration range: 2.95–4.51 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.

TRANSITIONS INVOLVING A COMPLETE FAMILY CHANGE

European Union 6C condition: Relational capacity Tested change: Toward the lower end of the recorded plausible range Relational capacity The tested variation enters a complete strategic-family change.	LEADING STRATEGIC FAMILY BEFORE THE TRANSITION Relational context shaping · Opportunistic timing and context exploitation LEADING STRATEGIC FAMILY AFTER THE TRANSITION Relational context shaping Leading strategic motors 58 · 29 Internal calibrated assessment: 3.26 · Observed change interval: 2.77–2.78 Value calibration range: 2.43–4.04 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Union 6C condition: Context Adherence Tested change: Toward the lower end of the recorded plausible range Context Adherence The tested variation enters a complete strategic-family change.	LEADING STRATEGIC FAMILY BEFORE THE TRANSITION Relational context shaping · Dependency rebalancing and selective withdrawal · Opportunistic timing and context exploitation LEADING STRATEGIC FAMILY AFTER THE TRANSITION Relational context shaping · Dependency rebalancing and selective withdrawal Leading strategic motors 58 · 54 · 26 · 50 Internal calibrated assessment: 3.11 · Observed change interval: 2.51–2.52

	Value calibration range: 2.26–4.00 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Relational capacity Tested change: Toward the lower end of the recorded plausible range Relational capacity The tested variation enters a complete strategic-family change.	LEADING STRATEGIC FAMILY BEFORE THE TRANSITION Relational context shaping · Opportunistic timing and context exploitation LEADING STRATEGIC FAMILY AFTER THE TRANSITION Relational context shaping Leading strategic motors 58 · 29 Internal calibrated assessment: 3.78 · Observed change interval: 2.28–2.29 Value calibration range: 2.99–4.54 Relation to the value calibration range: This change appears only outside the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Relational capacity Tested change: Toward the upper end of the recorded plausible range Relational capacity The tested variation enters a complete strategic-family change.	LEADING STRATEGIC FAMILY BEFORE THE TRANSITION Relational context shaping · Opportunistic timing and context exploitation LEADING STRATEGIC FAMILY AFTER THE TRANSITION Relational context shaping Leading strategic motors 58 · 29 Internal calibrated assessment: 3.78 · Observed change interval: 4.28–4.29 Value calibration range: 2.99–4.54 Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Context Adherence Tested change: Toward the lower end of the recorded plausible range Context Adherence The tested variation enters a complete strategic-family change.	LEADING STRATEGIC FAMILY BEFORE THE TRANSITION Relational context shaping · Dependency rebalancing and selective withdrawal · Opportunistic timing and context exploitation LEADING STRATEGIC FAMILY AFTER THE TRANSITION Relational context shaping · Dependency rebalancing and selective withdrawal Leading strategic motors 58 · 54 · 26 · 50 Internal calibrated assessment: 3.75 · Observed change interval: 2.08–2.09 Value calibration range: 2.95–4.51 Relation to the value calibration range: This change appears only outside the range currently considered plausible for this assessment.
European Semiconductor Strategic Autonomy by 2035 6C condition: Context Adherence Tested change: Toward the upper end of the recorded plausible range	LEADING STRATEGIC FAMILY BEFORE THE TRANSITION Relational context shaping · Dependency rebalancing and selective withdrawal · Opportunistic timing and context exploitation LEADING STRATEGIC FAMILY AFTER THE TRANSITION Relational context shaping · Dependency rebalancing and selective withdrawal

Context Adherence	Leading strategic motors 58 · 26 · 54 · 50
The tested variation enters a complete strategic-family change.	Internal calibrated assessment: 3.75 · Observed change interval: 4.35–4.36
	Value calibration range: 2.95–4.51
	Relation to the value calibration range: This change appears within the range currently considered plausible for this assessment.

How to read these results. Each test changes one 6C assessment at a time while the others stay fixed. If the leading strategic family remains the same, the choice is relatively stable under that variation. If the mix changes, the emphasis inside the choice is more sensitive. If a different family takes the lead, that condition deserves closer attention. Some extra stress tests may extend beyond the range currently considered plausible; those results are shown as outside-range cases, not as predictions or real-world thresholds.

Internal values and reported transition brackets are calibrated computational coordinates conditional on the reference assessment and declared simulation policy; they are not causal real-world thresholds or ratio measures. Each bracket localises one observed transition between adjacent tested points in a direction. A direction may contain multiple observed transitions, including reversions; observed brackets do not establish uniqueness or monotonicity across untested points. A full-family switch is classified against the reference configuration; adjacent test points may still share strategic families.

A no-switch result at the tested scale limit means that no complete strategic-family change was observed at the calibration boundary or at that tested limit. It does not prove that a non-monotonic switch and reversion cannot exist between untested outside-calibration points.

Strengths of the leading strategic group

Build from existing European strengths.

Europe already has meaningful positions in manufacturing equipment, industrial chips, power electronics and research, alongside a strong automotive and industrial customer base. These provide a practical starting point for selected capability growth. Using those assets to address important gaps may reduce exposure without the cost of duplicating every stage of the semiconductor chain.

Use small steps to build lasting options.

The leading directions favor gradual gains and focused trials over one large, irreversible bet. Europe can learn from selected pilots and build skills, supplier links and qualified alternatives. Their value depends on a credible path into industrial use, with customers, finance and production access; a trial alone does not reduce dependence.

Prepare while alternatives take shape.

Safeguards can help Europe manage disruption during long development cycles. Diversified supply, early warning and crisis coordination can preserve room to act while new capabilities mature. This complements investment in alternatives; it does not replace them or require ending international cooperation.

Critical points of the leading strategic group

Waiting can close important choices.

Semiconductor plants and supporting ecosystems take years to build, while technology, AI demand and trade rules can change sooner. If Europe waits for certainty before preparing alternatives, a critical dependency may become harder to address. Timing matters, but haste without clear priorities could lock in the wrong capabilities.

Pilots may not reach industrial use.

A successful experiment does not by itself create reliable production or reduce exposure. European projects still depend on skilled people, finance, suppliers, manufacturing access and demand. If these links are not in place, pilots may generate learning without changing Europe's options during a disruption.

Broad protection could weaken the base.

Building buffers is useful when it buys time, but broad duplication or costly protection could divert funds and skilled people from higher-priority gaps. It could also raise costs for European industrial and automotive users whose demand helps sustain local production. Safeguards should support, not crowd out, selective capability building.

Technical details

Timing

A preliminary approach would be to begin early with choices that preserve options, then proceed in stages. The long lead time for semiconductor capacity makes passive delay risky, while uncertain technology and demand make immediate large commitments risky too. Early work could identify consequential dependencies and help protect access; expansion could follow as technical qualification, customer demand and durable operating conditions support the next step.

Transparency vs secrecy

A preliminary approach would be to keep the public purpose and selection criteria clear: reduce critical vulnerabilities while preserving innovation and competitiveness. Sensitive supply-chain assessments should be prepared carefully, since exposed details can create commercial or security risks. Visible cooperation could be used where it builds shared commitment, and confidential information protected through appropriate safeguards rather than through surprise or concealment.

Relations vs force

A preliminary direction would be to lead with cooperation and persuasion among European institutions, member states, firms, research bodies and trusted suppliers. Their coordination is needed to build scale and sustain demand. Stronger pressure or emergency powers could be reserved for clearly defined disruptions and used within legal limits. A mix of dependable partnerships and proportionate safeguards appears better suited than treating every supplier as an adversary.

Methodological note

Methodological boundary. The 6C Model compares the frozen structured context with a finite repertoire of strategic motors and produces a comparative strategic-fit distribution. The ordering is not a prediction of success, an objective measurement of strategic strength, or an automatic recommendation. The deterministic part is the comparison; the final strategic choice remains a human judgment under uncertainty.

Assessment note. Actor 6C values are structured assessments of the actor's current strategic conditions. Objective 6C values answer a different question: they express the context-dependent required/appropriate level of each condition for the actor to have a credible strategic basis for attaining the objective. Required does not mean maximal. These calibrated coordinates reduce arbitrariness but are not physical measurements or statistical probabilities.

What the 6C analysis adds. A strong result may confirm a strategically plausible or already established posture; novelty is not required. The model-specific contribution is the explicit comparative-fit structure, the tested sensitivity pattern, observed conditional family switches and the evidence conditions that should trigger reassessment. These model-derived elements should not be confused with strategic propositions that were already plausible before the comparison.

Leading-group and developed-strategy note. Leading positions are used to read the strategic logics showing stronger comparative fit with the same assessed context. Strategies developed in this internal report are a subset chosen for deeper interpretation; selection for development is not a declaration that they are objectively optimal.

Development note. Tactical or operational sections are preliminary hypotheses for a later domain-appropriate design phase. They are not the strategic choice itself and do not invent responsibilities, resources, permissions, timing, commitments or current facts that are absent from the frozen scenario.

Strategic-motor repertoire. The 60-motor repertoire combines the 36 classical stratagem-derived mechanisms with 24 additional strategic motors developed by the Institute for Generative Strategy. The classical source tradition is not claimed as IGS intellectual property. The IGS methodological contribution includes the 6C formalisation and calibrated condition profiles applied across the full repertoire, together with the comparative matching and robustness method.

Composite counterpart note. The strategic counterpart may be a single actor or a composite structural force/set of obstructing causes. When composite, its 6C profile represents the aggregate strategic force exerted on the focal decision; it does not imply a unified will, common intent or single command structure. Internal heterogeneity and countervailing effects remain part of the case interpretation and uncertainty.

Note on strategy names. Historical strategy names are methodological labels of the 6C framework. Their underlying mechanisms must be translated into the actual scenario domain; historical military, deceptive or coercive imagery is not imported literally unless the real domain and evidence support it.

Strategic trend and developed strategies

Leading strategic directions

59 — Public strategic mechanism: Use time as leverage Methodological origin: Time as leverage
12 — Public strategic mechanism: Accumulate small gains Methodological origin: Take the opportunity to pilfer a goat
42 — Public strategic mechanism: Pilot, learn, scale Methodological origin: Try small, grow big
44 — Public strategic mechanism: Renew before disruption Methodological origin: Renew before it is too late
48 — Public strategic mechanism: Build preventive barriers Methodological origin: Barriers before the battle

Comparative-fit pattern and developed strategies

Top ranking trend

The leading strategies in the 6C ordering describe the strongest comparative-fit pattern in the current context; they are not predictions of success or automatic recommendations.

1. **Rank #1 · Strategy 59** — Use time as leverage
2. **Rank #2 · Strategy 12** — Accumulate small gains
3. **Rank #3 · Strategy 42** — Pilot, learn, scale
4. **Rank #4 · Strategy 44** — Renew before disruption
5. **Rank #5 · Strategy 48** — Build preventive barriers

Strategies developed in this report

These are the strategies selected for detailed discussion in this document. Their actual ranking position is shown from the current simulation ordering.

1. **Rank #1 · Strategy 59** — Use time as leverage
2. **Rank #2 · Strategy 12** — Accumulate small gains
3. **Rank #3 · Strategy 42** — Pilot, learn, scale
4. **Rank #4 · Strategy 44** — Renew before disruption
5. **Rank #5 · Strategy 48** — Build preventive barriers

In this report the developed strategies coincide with the Top ranking set; the two roles remain conceptually distinct.

Strategy 59

Public strategic mechanism: Use time as leverage

Methodological origin: Time as leverage

Meaning of the strategy

Time as leverage uses available time, offensive strength, and fit with the context by waiting until external pressure makes change more acceptable. A government may delay tax changes until a crisis creates consensus, reducing early backlash and supporting smoother transitions and stronger outcomes. Commercially, this timing can let a launch overwhelm a niche before incumbents marshal resistance.

Comment on the strategy

For the European Union, “Use time as leverage” means preparing early, then committing when a verified opportunity can turn existing strengths into lasting capability. Europe has strong positions in equipment, industrial chips, power electronics, and research, but remains dependent in advanced production and parts of chip design. Building and qualifying capacity takes years, while technology, demand, and trade conditions can change faster. The strategy therefore does not mean waiting for China to falter or delaying action until a crisis. It means matching each step to the time it needs: identify a consequential dependency, prepare a feasible route to reduce it, and act before a real opportunity closes. Its distinctive contribution is to connect readiness and timing with the slow work of qualification and industrial scale. Timing cannot replace demand, skilled people, investment, or coordination, and no specific open window is established.

Advantages

It connects Europe’s existing strengths to selected supply-chain gaps without assuming that every stage must be built at home. Staged commitments can allow learning and demand checks before harder-to-reverse investment. Preparing a route from research or equipment strength to qualified production may help Europe act before a policy or market opportunity closes.

Criticalities

The strategy cannot make an unqualified alternative useful or an uneconomic facility sustainable. Long construction and skills cycles may consume the available time, while changing technology or fragmented European action can undermine the chosen route. Waiting for China to make a mistake is not a sound premise; the evidence establishes neither a predictable opening nor an intention to block the objective.

In-depth analysis

Relationships analysis, strengths and critical points

Chart

	Defense	Offense	Relations	Potential	Time	Context
Actor - strategic counterpart relation						
Actor - objective relation						
Actor - strategy relation						
Strategy - strategic counterpart relation						
Strategy - objective relation						

Favourable relational effects and **unfavourable relational effects**. Colour expresses the polarity of the specific relation; circle size expresses its strategy-dependent intensity for that 6C condition. The same base Actor-Counterpart or Actor-Objective relation can therefore appear with different intensity across strategic motors because that condition has different relevance to each motor. A white central dot marks effects discussed in the relationship analysis. Polarity is not an intrinsic strength or weakness of either element.

Actor - strategic counterpart relation

Offensive strength — Unfavourable relational effect — Relevant:

In the European Union-China relationship, the current European ability to press forward does not translate easily into a direct advantage. Semiconductor production is specialized and interdependent, and Europe retains dependencies in advanced production and design. China's role in selected materials and its authority to regulate some supply flows make the relationship consequential, but do not establish control of the whole chain or a plan to block Europe. The practical implication is to avoid treating direct pressure as an easy route. A prepared move that reduces a specific dependency may be more workable than trying to force a broad break in interdependent supply.

Time availability — Unfavourable relational effect — Relevant:

The timing comparison between the European Union and China is unfavorable to Europe in this relationship: long investment and qualification cycles constrain how quickly European capabilities can become usable, while China has established industrial scale and can regulate selected supply flows. This does not prove that China can always act faster or that a particular window is closing. It does mean Europe should not assume that a 2035 horizon guarantees ample time. Prepare routes and decision gates early, then move when technical readiness and a real opportunity coincide.

Context Adherence — Unfavourable relational effect — Relevant:

Europe's current position does not fit this relationship without friction. Its industrial and research strengths matter, but advanced production and parts of design remain externally dependent; supply-chain interdependence also makes complete separation costly. China's material-chain position and selected export controls add a specific constraint, not proof of hostility across the whole relationship. For a timing-based approach, the useful response is to match action to the particular supply-chain exposure and preserve valuable cooperation where it does not undermine the objective. A broad, untargeted move could raise costs without reducing the vulnerability that matters.

Actor - objective relation

Offensive strength — Unfavourable relational effect — Relevant:

Europe's current ability to build or expand capability does not by itself make the 2035 objective easier to reach. The objective calls for durable reductions in critical vulnerabilities, not simply more production in any segment. Where investment or technology is directed toward a less consequential area, it may add capacity without reducing the dependency that threatens continuity. This relationship therefore favors selecting the bottleneck and application first, then judging whether a proposed move can produce qualified, usable capability. It does not mean Europe lacks all means to act.

Time availability — Unfavourable relational effect — Relevant:

The timing fit is strongly unfavorable: the objective requires enough usable time to sequence long investments, qualify alternatives, and adapt to changes in technology and supply. Europe's present timing room is constrained by long industrial cycles and hard-to-reverse choices. This is not a claim that the objective itself has little time, or that the 2035 horizon is meaningless. It means credible attainment depends on starting preparatory work early and avoiding delay that leaves no time to turn a promising route into reliable production.

Context Adherence — Unfavourable relational effect — Relevant:

The gap between Europe's established strengths and its dependence in advanced production and design strains its fit with the objective. The objective is not full self-sufficiency; it is a durable reduction in critical vulnerabilities while preserving innovation

and competitiveness. A plan that measures progress mainly by aggregate capacity could therefore miss the intended result. Timing-based action should focus on whether a capability addresses a consequential dependency and can be made usable before conditions change, rather than treating every increase in local production as sufficient.

Actor – strategy relation

Defensive strength — Favourable relational effect — Relevant:

Europe's defensive position can support a timing-based approach by protecting established capabilities and keeping the supply-chain base usable while longer changes are prepared. Its strengths in equipment, industrial chips, power electronics, and research offer assets worth preserving. This alignment does not mean every vulnerability is already protected: dependence in advanced production and design remains. The practical value is to avoid sacrificing functioning strengths while preparing a targeted next step, so readiness is not lost before a feasible opportunity appears.

Offensive strength — Unfavourable relational effect — Relevant:

Europe's offensive capacity is somewhat misaligned with a strategy that relies on turning timing into a decisive move. The Union has industrial and research strengths, but expanding capability into advanced production or design depends on long cycles, demand, skills, and coordination. That makes a rapid, broad push difficult to assume. The strategy should therefore use a selective commitment: prepare a feasible route in a specific bottleneck and move when its prerequisites are met, rather than treating timing as a substitute for the capacity needed to deliver.

Relational capacity — Favourable relational effect — Relevant:

Europe's ability to coordinate through common institutions and policy frameworks supports preparation across firms, research, users, and member states. That matters because the strategy depends on more than a single investment: a timely opportunity may require aligned demand, technical access, and cross-border cooperation. The capacity is meaningful but not frictionless, and differences in national priorities can fragment action. Use coordination to clarify the decision gates and shared purpose; do not assume that agreement or execution is automatic.

Potential energy — Favourable relational effect — Relevant:

Europe's research base, equipment position, industrial chip activity, and policy support provide resources that could be directed toward a selected supply-chain need. This gives the timing strategy something to prepare and convert. Yet resources become durable capability only when skills, infrastructure, demand, and technical qualification also come together. The relation is therefore supportive, but not proof that a particular project is funded, viable, or ready to scale. Concentrate effort where those conditions can plausibly be joined.

Time availability — Unfavourable relational effect — Relevant:

Europe's room to act is a constraint on this strategy. Semiconductor facilities and alternatives take years to build and qualify, while technology and market conditions can move sooner. The 2035 horizon leaves some room to sequence choices, but it does not

make delay harmless. The approach must begin with preparation now and reserve commitment for a verified opportunity; it should not wait for a crisis or presume that a competitor will overextend.

Context Adherence — Unfavourable relational effect — Relevant:

The strategy's timing logic only partly fits Europe's current setting. Specialized, interdependent supply chains make complete self-sufficiency costly, and Europe has both established strengths and significant external dependencies. The setting therefore calls for selective vulnerability reduction, not a general retreat from international exchange. Timing can help prioritize a feasible step, but it cannot make a poorly matched investment useful. The route must fit the dependency, technical needs, demand, and wider supply-chain conditions it is meant to address.

Strategy 12

Public strategic mechanism: Accumulate small gains

Methodological origin: Take the opportunity to pilfer a goat

Meaning of the strategy

The twelfth stratagem refers to taking advantage of small, gradual opportunities in a conflict and accumulating substantial gains over time. It is particularly suited to stable, prolonged conflicts and is familiar to chess players, who often seek to gradually dominate the center of the board or gain a pawn advantage—conditions that may ultimately lead to a winning position. This stratagem is neither specifically offensive nor defensive; it relies instead on careful management of timing and changing circumstances, and constant attention to the resources that make up the actor's potential energy.

Applied to the economic domain, this strategy means, for example, taking advantage of small regulatory gaps or shifts in currency rates to improve profit margins. These are not major moves, but when made consistently, they help build a stronger financial base. It is about making the most of small openings that others overlook or ignore.

Comment on the strategy

“Accumulate small gains” means turning a series of modest, deliberate advances into useful capability. For the European Union, a gain matters when it reduces a specific semiconductor vulnerability and strengthens a connected capability, not simply when it adds output. Existing strengths in equipment, industrial chips, power electronics and research could support this approach, while dependencies in advanced production and design make careful selection essential. The strategy favours early, repeatable steps that build knowledge, qualified alternatives or bargaining leverage; it avoids relying on one enormous investment to resolve the whole challenge. Its distinctive test is whether each step makes the next one more credible or easier to achieve. The approach must not be mistaken for a substitute for sufficient scale: long investment cycles and the 2035 objective may leave too little time if gains are scattered or fail to reach sustained production.

Advantages

Small, targeted steps can limit the risk of committing too much to one uncertain technology or facility. They can build on European strengths and create practical learning across design, equipment, packaging and production. When a step reduces a consequential dependency, it may also improve continuity or bargaining leverage without requiring the Union to reproduce the entire global chain.

Criticalities

Small projects are not valuable just because they are small. If gains do not address consequential bottlenecks, connect to complementary capabilities or reach sustained production, they may not reduce vulnerability. Long construction and qualification cycles also mean gradual progress can arrive too late; scattered commitments may absorb attention while advanced design and production dependencies remain.

In-depth analysis

Relationships analysis, strengths and critical points

Chart

	Defense	Offense	Relations	Potential	Time	Context
Actor - strategic counterpart relation						
Actor - objective relation						
Actor - strategy relation						
Strategy - strategic counterpart relation						
Strategy - objective relation						

Favourable relational effects and **unfavourable relational effects**. Colour expresses the polarity of the specific relation; circle size expresses its strategy-dependent intensity for that 6C condition. The same base Actor-Counterpart or Actor-Objective relation can therefore appear with different intensity across strategic motors because that condition has different relevance to each motor. A white central dot marks effects discussed in the relationship analysis. Polarity is not an intrinsic strength or weakness of either element.

Actor - strategic counterpart relation

Time availability — Unfavourable relational effect — Relevant:

The negative relation means that this strategy's incremental pace does not align easily with the European Union's timing position in relation to China. Semiconductor investment and qualification take time, while supply-chain conditions and policy choices

can change before new capacity is ready. China's ability to regulate selected supply flows adds a timing concern, but does not show control of the whole chain or an intention to block the European objective. Small steps remain possible, yet this relation cautions against assuming that gradual gains alone will keep pace with changing exposure.

Context Adherence — Unfavourable relational effect — Relevant:

The negative relation signals that accumulating small gains does not fully match the context of the European Union's relationship with China. The relationship combines interdependent supply chains and trade with competition and economic-security concerns; selected controls can affect access to some inputs. A stepwise approach may help build alternatives, but it should focus on a specific exposure and avoid treating the relationship as uniformly hostile or assuming every input is controlled. Its value depends on whether successive gains address the actual supply-chain issue at stake.

Actor - objective relation

Time availability — Unfavourable relational effect — Relevant:

The negative relation means that the strategy's gradual pace is difficult to reconcile with the timing needs of European Semiconductor Strategic Autonomy by 2035. Credible progress requires room to sequence long investments and adapt before important options close, while new facilities and industrial capabilities take years to develop. Small gains can contribute, but this relation warns that a slow series of disconnected steps may not produce usable capability in time. Priorities therefore need to favour gains that can connect to real qualification, demand and production rather than counting early announcements as attainment.

Context Adherence — Unfavourable relational effect — Relevant:

The negative relation indicates that accumulating gains may not, by itself, fit what the European objective requires. The objective is selective reduction of critical vulnerabilities while preserving innovation, efficiency and downstream competitiveness; it does not require replacing every import. The strategy aligns only when its small steps address consequential dependencies and build durable European capability or dependable access. If gains are chosen merely because they are available, they may leave advanced production or design exposure unchanged and divert effort from the objective's actual needs.

Actor - strategy relation

Defensive strength — Favourable relational effect — Relevant:

The positive relation means that the strategy's gradual, attentive approach can support the European Union's defensive position in this specific pairing. Building qualified alternatives or strengthening a consequential bottleneck could add protection against disruption without requiring full self-sufficiency. This does not mean the Union already has complete protection, nor that each small project improves it. The benefit depends on selecting a real exposure and carrying the gain through to usable capability and continuity.

Offensive strength — Favourable relational effect — Relevant:

The positive relation means that the strategy's early, repeated steps can support the European Union's ability to expand semiconductor capability in this pairing. Building on existing strengths in equipment, industrial chips, power electronics and research may help turn resources into further gains. The relation does not establish that any particular project or expansion is underway. Each proposed step needs a credible path from capability to qualification, customer use and durable production.

Time availability — Unfavourable relational effect — Relevant:

The negative relation means that the strategy's preferred steady accumulation does not fully fit the European Union's available timing room. Long investment cycles, qualification needs and changing technology can make gradual progress vulnerable to delay. This is a mismatch between the strategy's pace and the actor's situation, not a claim that the Union has no time or capacity. It favours early selection of gains that can build on existing assets and a willingness to change course if the path is too slow.

Context Adherence — Unfavourable relational effect — Relevant:

The negative relation indicates that the strategy's focus on available small gains can pull against the European Union's wider strategic context if selection is too casual. The objective is not to collect minor wins, but to reduce critical vulnerabilities without sacrificing innovation or competitiveness. A step fits only when evidence connects it to a consequential dependency and a credible path to lasting use. This relation cautions against treating every convenient opportunity as strategically valuable.

Strategy 42

Public strategic mechanism: Pilot, learn, scale

Methodological origin: Try small, grow big

Meaning of the strategy

The “Try small, grow big” strategy draws on available time, alignment with context and offensive strength to achieve results that direct force would make costly or unstable. It works by amplifying what already resonates in the environment and minimizing dependence on potential energy and defensive strength when these are scarce or counterproductive. The method is less about slogans than about sequence: prepare acceptance, move when friction is lowest, and consolidate before opponents can reframe. Strategically, it often succeeds by letting time do the work: waiting for rivals to overextend, then moving at the decisive instant. Operationally, it aligns means with the terrain—legal, cultural or geographic—so each move looks “natural.” Risks mirror the promise: overconfidence in the setting, neglect of logistics, or an action that outruns its social license. Executed well, small, well-timed advantages compound into a durable position, with opponents discovering too late that the center of gravity has already shifted.

Applied to the economic domain, this strategy means, for example, launching micro-investments or testing reforms in small regions before expanding. A government might try a tax incentive in one city to measure its effects before a national rollout. This reduces risk and aligns policy with local realities, allowing learning before scaling.

Comment on the strategy

“Pilot, learn, scale” means using small, reversible tests to decide where Europe should commit for European Semiconductor Strategic Autonomy by 2035. The European Union has strengths in equipment, industrial chips, power electronics and research, alongside dependencies in advanced production and parts of chip design. A test should connect one relevant capability to a real user and reveal whether it can reach qualified, dependable supply—not merely produce a promising demonstration. This approach can expose hidden dependencies before long investment cycles lock in a costly path. It does not remove the time pressure or replace sustained investment: a pilot that cannot lead to viable production will not reduce a critical vulnerability. The least obvious benefit is that a focused test can change which capability deserves scale-up, rather than simply spreading effort across more projects.

Advantages

Small tests can reveal whether a European capability meets a real user's needs before larger, harder-to-reverse commitments are made. They can also expose dependencies in design, fabrication, materials, packaging, skills or customer demand. This makes it easier to concentrate effort on a consequential bottleneck, build on existing strengths and avoid treating announced investment or a successful demonstration as proof of durable supply.

Criticalities

The European Union's limited timing room and long industrial investment cycles mean tests must lead quickly to a scale-up decision. A pilot alone cannot provide continuity or replace sustained investment, skills, qualified production and viable demand. China's industrial scale and selected supply-chain leverage add pressure, while the precise autonomy threshold and priority vulnerabilities remain unresolved. Testing too many options, or measuring activity rather than a route to qualified supply, could consume scarce time without changing exposure.

In-depth analysis

Relationships analysis, strengths and critical points

Chart

	Defense	Offense	Relations	Potential	Time	Context
Actor - strategic counterpart relation						
Actor - objective relation						
Actor - strategy relation						
Strategy - strategic counterpart relation						
Strategy - objective relation						

Favourable relational effects and **unfavourable relational effects**. Colour expresses the polarity of the specific relation; circle size expresses its strategy-dependent intensity for that 6C condition. The same base Actor-Counterpart or Actor-Objective relation can therefore appear with different intensity across strategic motors because that condition has different relevance to each motor. A white central dot marks effects discussed in the relationship analysis. Polarity is not an intrinsic strength or weakness of either element.

Actor - strategic counterpart relation

Time availability — Unfavourable relational effect — Relevant:

The timing relationship is unfavourable for the European Union relative to China in this strategic setting. Long semiconductor investment and qualification cycles, combined with existing external dependencies, limit the Union's room to wait or sequence choices freely. This does not establish that China can act faster across the whole chain; it means that a gradual test-and-scale approach must produce decision-relevant learning promptly, rather than allowing exploration to delay choices that need long lead times.

Actor - objective relation

Time availability — Unfavourable relational effect — Relevant:

The timing relationship between the European Union and European Semiconductor Strategic Autonomy by 2035 is unfavourable. Credible attainment requires enough time to develop, qualify and sustain selected capabilities, while long industrial cycles and ongoing dependencies make the available window consequential. This is a tension between the timing needed for the objective and the time-consuming work involved, not a claim that the objective itself has little time. Small tests may improve sequencing, but they cannot substitute for timely scale-up.

Context Adherence — Unfavourable relational effect — Relevant:

The relation between the European Union's current fit with its objective and the demands of this strategy is slightly unfavourable. The objective is to reduce critical vulnerabilities while preserving innovation, efficiency and downstream competitiveness; broad experimentation could drift away from that balance if it tests attractive technologies without addressing a consequential need. This is not a judgment that Europe's capabilities are inherently poorly suited. It calls for each test to be tied to an actual supply-chain vulnerability, user need and plausible route to dependable supply.

Actor - strategy relation

Defensive strength — Favourable relational effect — Relevant:

The European Union's existing strengths in equipment, industrial chips, power electronics and research give this strategy a useful basis for bounded tests. In this specific relation, defensive strength aligns positively because tests can build on established capabilities while probing where they could support more dependable supply. That alignment does not mean a pilot protects the Union from disruption, or that current strengths cover advanced production and design dependencies. The practical value is a grounded starting point for learning before a larger commitment.

Potential energy — Favourable relational effect — Relevant:

The European Union's research and industrial base, together with its established policy framework, provides some resources that can support small, focused tests. In this relation, potential energy aligns positively with the strategy because an experiment can use existing capabilities to learn before requiring a larger commitment. This is not evidence that a particular test is funded, available or ready to scale. Its value depends on whether scarce skills, investment and facilities can be directed toward a consequential user need.

Time availability — Unfavourable relational effect — Relevant:

The timing fit between the European Union and this strategy is somewhat unfavourable. The approach needs time to test, learn and then scale, while long semiconductor development and qualification cycles reduce the Union's practical room for delay. The relationship does not mean that experimentation is inherently too slow; it means that a test should answer a real allocation question quickly and should not become an open-ended pilot. Parallel tests are worth considering only where they inform distinct decisions without diverting scarce skills or resources from deployment.

Strategy 44

Public strategic mechanism: Renew before disruption

Methodological origin: Renew before it is too late

Meaning of the strategy

The “Renew before it is too late” strategy draws on available time, alignment with context and offensive strength to reform financial policies before pressure causes them to fail. A central bank might adjust interest rates ahead of inflation trends; acting early can preserve control and avoid panic. Its economic aim is stability through timing rather than emergency action.

Comment on the strategy

“Renew before disruption” means changing Europe’s semiconductor policy path while there is still room to choose, rather than waiting for a shortage or failed investment to force a response. The case is not a call to make every chip at home: global production is specialized, and complete self-sufficiency would be costly and difficult. Instead, renewal should keep the objective focused on reducing critical vulnerabilities while protecting innovation and the competitiveness of European industries. Europe’s strengths in equipment, industrial chips, power electronics and research offer a base, while dependencies in advanced production, design, materials and packaging remain consequential. The distinctive move is to review commitments before long investment cycles lock in an unhelpful mix: distinguish announced projects from qualified, usable and sustainable capacity, and adjust priorities when evidence shows a critical function is not being secured. The strategy’s timing and context fit are constrained, so early action still needs workable coordination and acceptance.

Advantages

The strategy creates an opportunity to correct a poor investment path before construction, skills and technology choices become hard to reverse. It can direct attention toward critical functions and bottlenecks, not simply a larger production share. Europe can build on existing strengths and use staged decisions to adapt as technology, demand and supply conditions change. Early, evidence-based renewal may also make a focused shift less disruptive than a crisis-driven change.

Criticalities

Renewal can fail if “act early” becomes a reason to rush into costly capacity without dependable demand, skilled workers, infrastructure or a route from research to qualified production. Europe’s long investment cycles and coordination needs limit its timing room. A broad domestic-production drive could leave key dependencies untouched,

while weak review rules could preserve projects after their strategic value has changed. Any change must also account for partner access and the risk of locking in the wrong technology.

In-depth analysis

Relationships analysis, strengths and critical points

Chart

	Defense	Offense	Relations	Potential	Time	Context
Actor - strategic counterpart relation						
Actor - objective relation						
Actor - strategy relation						
Strategy - strategic counterpart relation						
Strategy - objective relation						

Favourable relational effects and **unfavourable relational effects**. Colour expresses the polarity of the specific relation; circle size expresses its strategy-dependent intensity for that 6C condition. The same base Actor-Counterpart or Actor-Objective relation can therefore appear with different intensity across strategic motors because that condition has different relevance to each motor. A white central dot marks effects discussed in the relationship analysis. Polarity is not an intrinsic strength or weakness of either element.

Actor - strategic counterpart relation

Time availability — Unfavourable relational effect — Relevant:

The EU-China relationship makes timing a constraint on Europe's choices. China has industrial scale and authority to regulate selected supply-chain flows, while Europe is still addressing external dependencies and faces long development cycles. That combination can reduce Europe's room to wait, sequence investment or recover from a

disruption in affected areas. It does not establish that China controls the full semiconductor chain or intends to target the EU. For preventive renewal, the practical implication is to identify where timing matters most and prepare alternatives before a change in access forces a rushed response.

Context Adherence — Unfavourable relational effect — Relevant:

Europe's effort to strengthen semiconductor capability does not align easily with the current relationship's mix of trade, interdependence and economic-security tension. China's role in selected materials and supply-chain flows can make access strategically consequential, while European measures to reduce exposure may affect existing supplier positions. This is a relation-specific friction, not proof that either side is wholly hostile or that every capability is in conflict. Renewal should therefore focus on the specific inputs and functions at issue, preserving useful exchange where possible while reducing critical exposure.

Actor - objective relation

Time availability — Unfavourable relational effect — Relevant:

The 2035 objective requires enough time to sequence long investments, develop skills and adapt to changing technology and supply conditions. Europe has some time to act, but advanced production dependencies and long construction and qualification cycles make the available room tight. This mismatch means a late correction could arrive after important choices are difficult to reverse. The objective is not simply to move quickly: it requires a durable path that can deliver relevant capability before the horizon, while retaining room to adjust as needs change.

Context Adherence — Unfavourable relational effect — Relevant:

The objective calls for targeted vulnerability reduction while preserving innovation, efficiency and the competitiveness of downstream industries. Europe's present strengths and its remaining dependencies do not yet fully match that combination. A policy focused only on increasing domestic output could fit the objective poorly if it leaves the most consequential dependencies in place or creates capacity without sustainable use. The relevant relation is therefore about aligning choices with critical needs, not judging Europe's overall capability from this tension alone.

Actor - strategy relation

Defensive strength — Favourable relational effect — Relevant:

The strategy fits Europe's established capacity to protect important interests through policy frameworks, industrial assets and research. In this relation, that base can help support preventive renewal: Europe can examine its own commitments and redirect attention toward critical functions before external pressure dictates the response. The positive fit does not mean Europe already has sufficient resilience across the chain. Dependencies in advanced production and design remain, so the strategy needs to use existing strengths to address defined gaps rather than treating them as a complete substitute for missing capabilities.

Relational capacity — Favourable relational effect — Relevant:

Europe's institutional and policy coordination capacity supports the strategy's need to prepare and align a change before acting. Common EU structures can help connect member states, firms, research and users, which matters in a supply chain spanning many places and specialized stages. This alignment is useful but not automatic: differing national priorities and competition over costs, benefits and production locations can complicate decisions. The relation supports a coordinated renewal process, not an assumption that agreement or smooth implementation already exists.

Time availability — Unfavourable relational effect — Relevant:

The strategy asks Europe to change course while it still has usable time, but the actor-strategy relation is strained by the long cycles involved. Building, staffing and qualifying semiconductor capacity takes time, while technology and geopolitical conditions can change sooner. This makes the strategy's early-warning logic relevant but difficult to execute: a review must happen before commitments close options, without rushing into poorly matched projects. The signal concerns the fit between Europe's timing room and this strategy's demands, not an intrinsic lack of capacity or a prediction that action will be late.

Context Adherence — Unfavourable relational effect — Relevant:

Preventive renewal depends on fitting the move to the actual structure of semiconductor supply chains. Europe's existing strengths and its dependencies make selective change more appropriate than an attempt to reproduce every stage. Yet the strategy's fit is constrained where a proposed change does not account for demand, skills, infrastructure, partner access or downstream needs. The relation therefore calls for careful selection and sequencing: act early, but only in ways that address a specified vulnerability and remain workable in the economic and institutional setting.

Strategy 48

Public strategic mechanism: Build preventive barriers

Methodological origin: Barriers before the battle

Meaning of the strategy

The “Barriers before the battle” strategy combines defensive strength, potential energy and alignment with context. In security, layered defenses absorb shocks and deny escalation advantages; financially, flexible reserves preserve options until payoffs become clearer. Economically, advance reserves and regulatory frameworks—such as sovereign wealth funds or automatic stabilizers in unemployment insurance—can soften downturns without drastic moves.

Comment on the strategy

“Build preventive barriers” means preparing continuity before a supply shock, not trying to make Europe produce every semiconductor input itself. The European Union has established strengths in equipment, industrial chips, power electronics and research, alongside dependencies in advanced logic, large-scale foundry capacity and parts of chip design. This strategy would use those strengths to make critical functions harder to interrupt: where evidence confirms a serious bottleneck, arrange and test usable alternatives, access agreements or other proportionate safeguards before a crisis. Its distinctive test is whether a fallback can actually be qualified and used, including across design, materials, packaging and customer needs—not whether Europe has more suppliers or announced more capacity. Because the relationship with China combines trade and interdependence with selected supply-chain leverage, prepare for restrictions as a contingency, not as an established attack. Avoid both blanket self-sufficiency and reliance on cooperation alone.

Advantages

Preparation can reduce the chance that a disruption forces rushed choices or stops a critical production route. The European Union’s strengths in equipment, research, industrial chips and power electronics may support practical alternatives and continuity arrangements. Focusing on a few verified bottlenecks can protect essential functions without duplicating the entire global chain. Early qualification and clear access terms could also make a fallback more usable when it is needed.

Criticalities

Protection can become costly or rigid if it is built around the wrong bottleneck, a technology that loses relevance, or capacity without lasting demand. The EU’s long investment and qualification cycles make timing important, while its dependencies

mean that one local production step cannot secure a whole chain. Barriers also cannot replace coordination with firms and partners; relying on cooperation alone would leave exposure if access changes.

In-depth analysis

Relationships analysis, strengths and critical points

Chart

	Defense	Offense	Relations	Potential	Time	Context
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Actor - strategic counterpart relation

Defensive strength — Unfavourable relational effect — Relevant:

In this relation, the European Union's present position does not automatically translate into protection against China's selected supply-chain leverage. The scenario describes European strengths but also dependencies in advanced production and design, while

China can regulate some supply flows. This makes a preventive approach harder if it assumes that existing European assets alone can secure continuity. The signal concerns how the current relationship affects the strategy, not a judgment that the EU is intrinsically weak or that China controls the entire chain.

Potential energy — Unfavourable relational effect — Relevant:

The relation makes it harder for the European Union to rely on its own available resources alone to protect semiconductor continuity against China's position in selected materials and supply-chain activities. European equipment, research and industrial capabilities are meaningful, but do not by themselves replace external sources or advanced production routes. Preventive barriers therefore need to focus on specific exposures and usable alternatives. This is a relationship-level constraint, not a claim that the EU lacks resources or that China dominates every stage.

Context Adherence — Unfavourable relational effect — Relevant:

The current relationship makes it difficult to treat European protective measures as fully aligned with the setting: semiconductor supply is specialized and international, while selected flows are subject to state licensing and economic-security concerns. A barrier that assumes separation from external suppliers may conflict with the interdependence on which production depends. The practical implication is to protect specific critical functions while preserving workable trade and partnership routes, rather than treating either complete dependence or complete separation as a given.

Actor - objective relation

Defensive strength — Unfavourable relational effect — Relevant:

For the established objective, the current EU-China relationship makes defensive preparation challenging: external dependencies and concentrated supply routes can leave critical functions exposed even as Europe builds its own capabilities. The objective calls for durable reduction of serious vulnerabilities, not the elimination of all imports. A preventive barrier must therefore address the particular stages or inputs that could interrupt essential uses. This signal describes the fit between the present relationship and the objective, not an absolute weakness in Europe's defenses.

Potential energy — Unfavourable relational effect — Relevant:

The current relationship makes it difficult to turn European resources into progress toward the objective: existing strengths in equipment, industrial chips, power electronics and research do not automatically provide alternatives for advanced production, design or concentrated inputs. The objective requires usable capability at strategically important points, not just resources or announcements. Barriers will matter only if they turn available assets into qualified, dependable continuity routes. This is a mismatch in this relation, not a claim that Europe has no productive capacity.

Context Adherence — Unfavourable relational effect — Relevant:

The objective is difficult to pursue in the current setting because semiconductor production depends on specialized international stages, while Europe seeks to reduce its most consequential vulnerabilities. A protective plan that ignores those

dependencies could undermine innovation, efficiency or downstream competitiveness; a plan that leaves critical access unchanged may not reduce exposure. The relevant choice is which functions need protection and how to preserve reliable routes, not whether to abandon international specialization altogether.

Actor - strategy relation

Defensive strength — Unfavourable relational effect — Relevant:

The European Union's current conditions do not align easily with a strategy built around protection before disruption. Its industrial strengths provide a starting point, but dependencies in advanced production and design mean that barriers cannot simply be declared or built around one local asset. The approach must first identify where protection is actually needed and whether a usable fallback can be arranged. This relation signals friction between the strategy and the current setting, not an inherent lack of defensive ability in the EU.

Offensive strength — Favourable relational effect — Relevant:

Some European strengths can support selective action: equipment, research, power electronics and industrial chips may help create or maintain continuity routes in relevant areas. This gives the strategy a possible active component, even though its main purpose is preparation rather than expansion for its own sake. Any such move should be tied to a verified bottleneck and a route to qualified use; the relation does not mean that Europe can outbuild or replace the entire external chain.

Relational capacity — Favourable relational effect — Relevant:

The strategy can use the EU's ability to coordinate institutions, industry and research to prepare safeguards before a disruption. This matters because qualification, access and production depend on several connected stages and organizations. Coordination is useful when it produces workable continuity arrangements, not merely plans or shared statements. The positive fit is relational: it identifies coordination as a way to put preventive barriers in place, rather than proving that coordination is already complete.

Potential energy — Unfavourable relational effect — Relevant:

The strategy's demand for protective arrangements may compete with other uses of Europe's resources. Existing research, equipment and industrial strengths provide a base, but long investment cycles, skills needs and external dependencies constrain how quickly those resources become durable production. The relation therefore favours careful selection: put effort into barriers that protect a consequential function, rather than spreading it across every segment. This does not imply that Europe has little potential energy; it marks the demands this strategy places on it.

Time availability — Favourable relational effect — Relevant:

The 2035 horizon gives Europe some room to sequence decisions before a disruption, which supports a preventive approach. Yet fabrication, qualification and supporting infrastructure take time, and choices may be hard to reverse. The strategy fits this timing only if preparation begins early enough for the relevant fallback to become usable. This relation describes the opportunity to sequence action, not proof that there is ample time for every possible investment.