



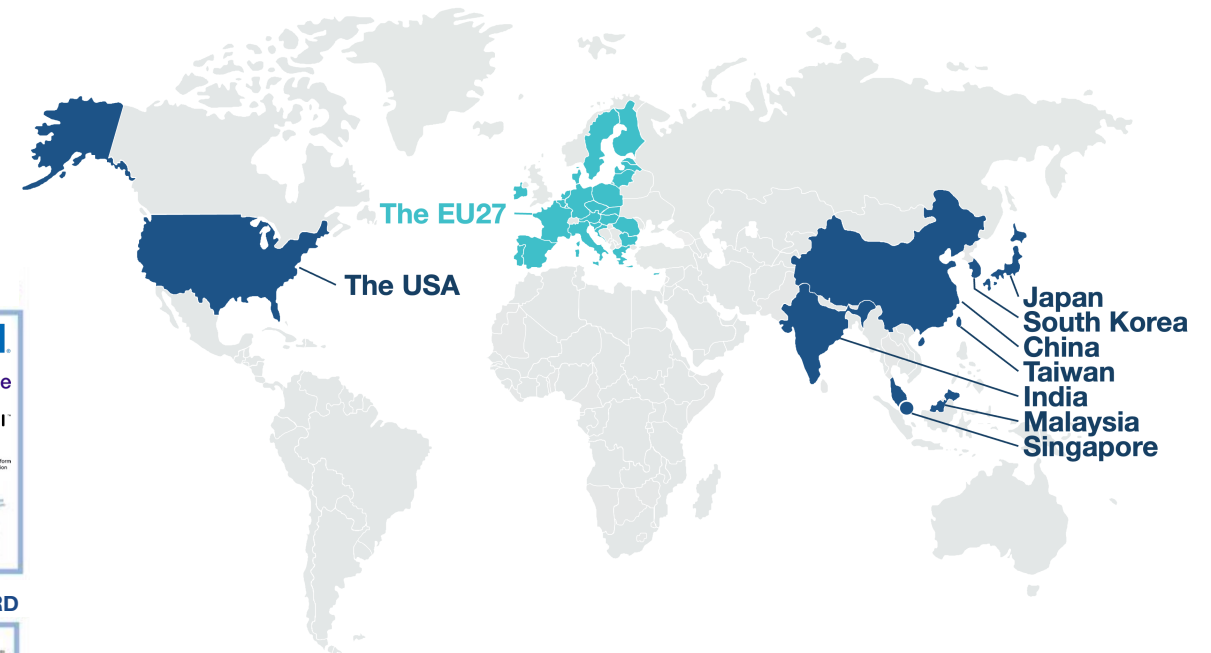
DECISION
ETUDES & CONSEIL

Semiconductor value chain monitoring ICOS – International Cooperation On Semiconductors

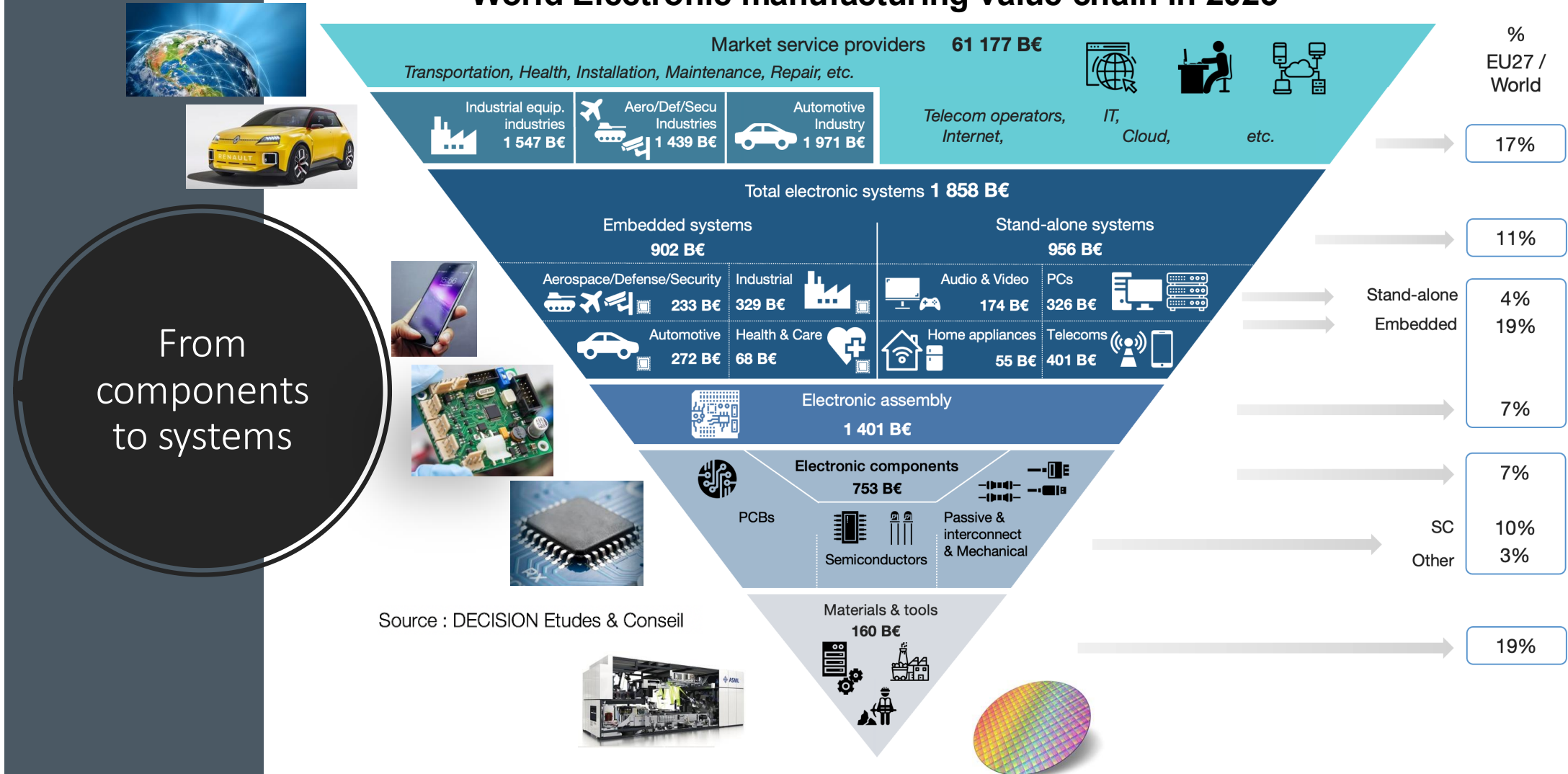
04 2025

International Cooperations on Semiconductors

- Goal: Support the EC in building cooperation with third countries in semiconductors
- Client: European Commission – DG CONNECT
- Duration: 2023-2025 / Budget: 3 M€
- DECISION leads the economic analysis
- 19 Consortium Members from 9 Member States



World Electronic manufacturing value chain in 2023



DECISION is a consulting firm active in economic and industrial studies, market research and forecasts, and strategic consulting specialized in the electronics industries since our inception in 1991

OUR EXPERTISE



Market Research

- Sector & Competitiveness analysis
- Market sizing & Economic forecasts
- Industrial landscape & player strategies



Strategy

- Prospect identification & Partner prospection
- Investment (M&A, due diligence, make or buy...)
- Market opportunities



Influence

- Policy recommendations
- White papers, position papers

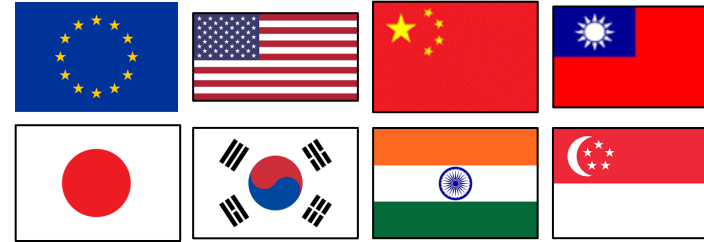
OUR TEAM



Comparative Analysis of Semiconductor Ecosystems Worldwide



Ecosystems of 8 countries



- Market (by segment)
- Production (across the value-chain)
- Trades
- Investments
- Policy strategies (chips acts)
- Strengths & dependencies
- Roadmap for cooperation (confidential)

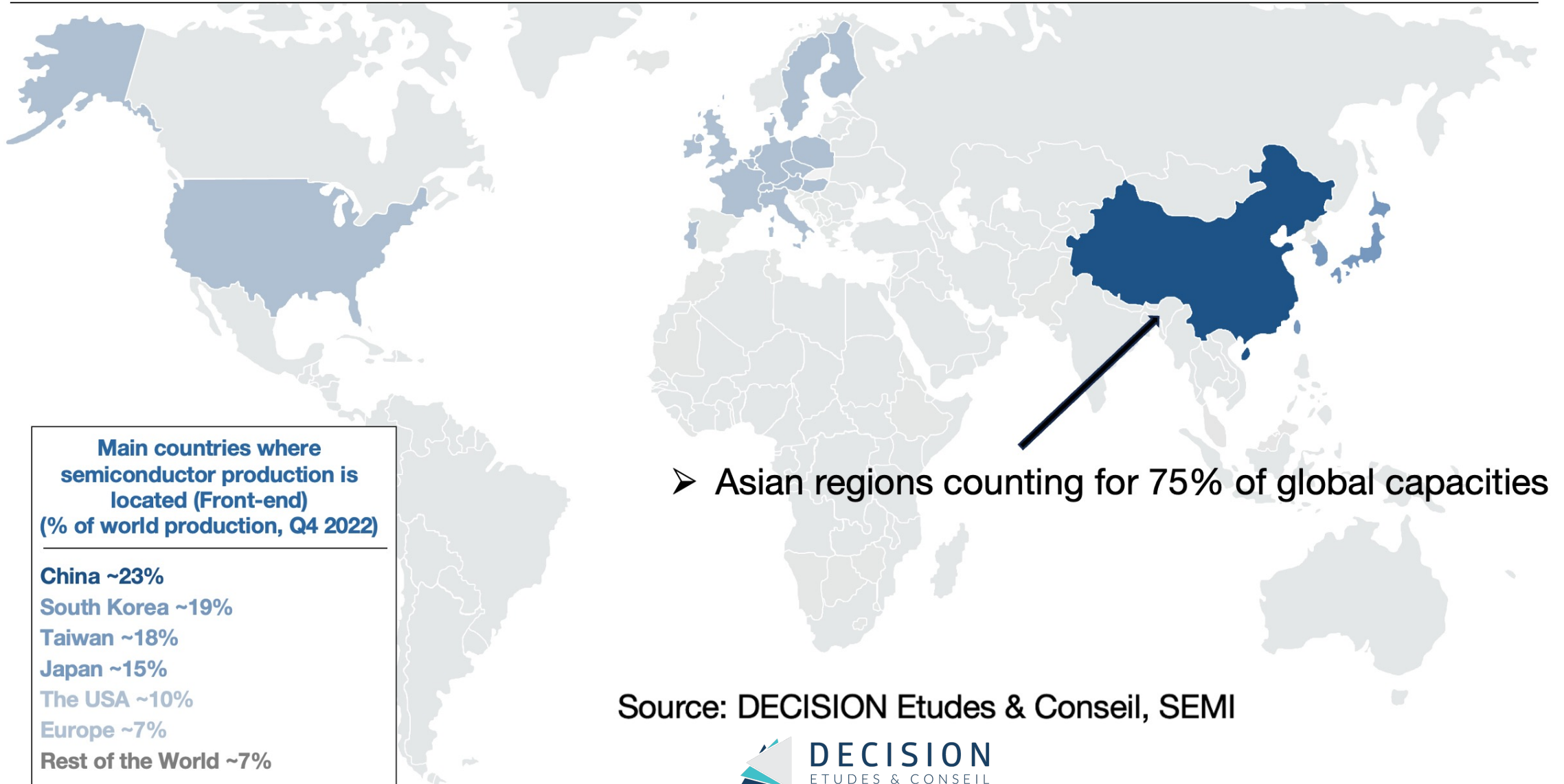
1. **The globalized semiconductor value-chain: State of play in 2025**
2. **1990s - 2020s: A shifting Geopolitical Environment**
3. **Semiconductor: China's Rise and U.S. Industrial Policy Tools Aimed at Containment**
4. **Emerging countries: Newcomers of the semiconductor industry**
5. **Status of trades in semiconductor in this changing environment**
6. **The EU semiconductor strategy, Adapting to a Changing Geopolitical Landscape**

(1)

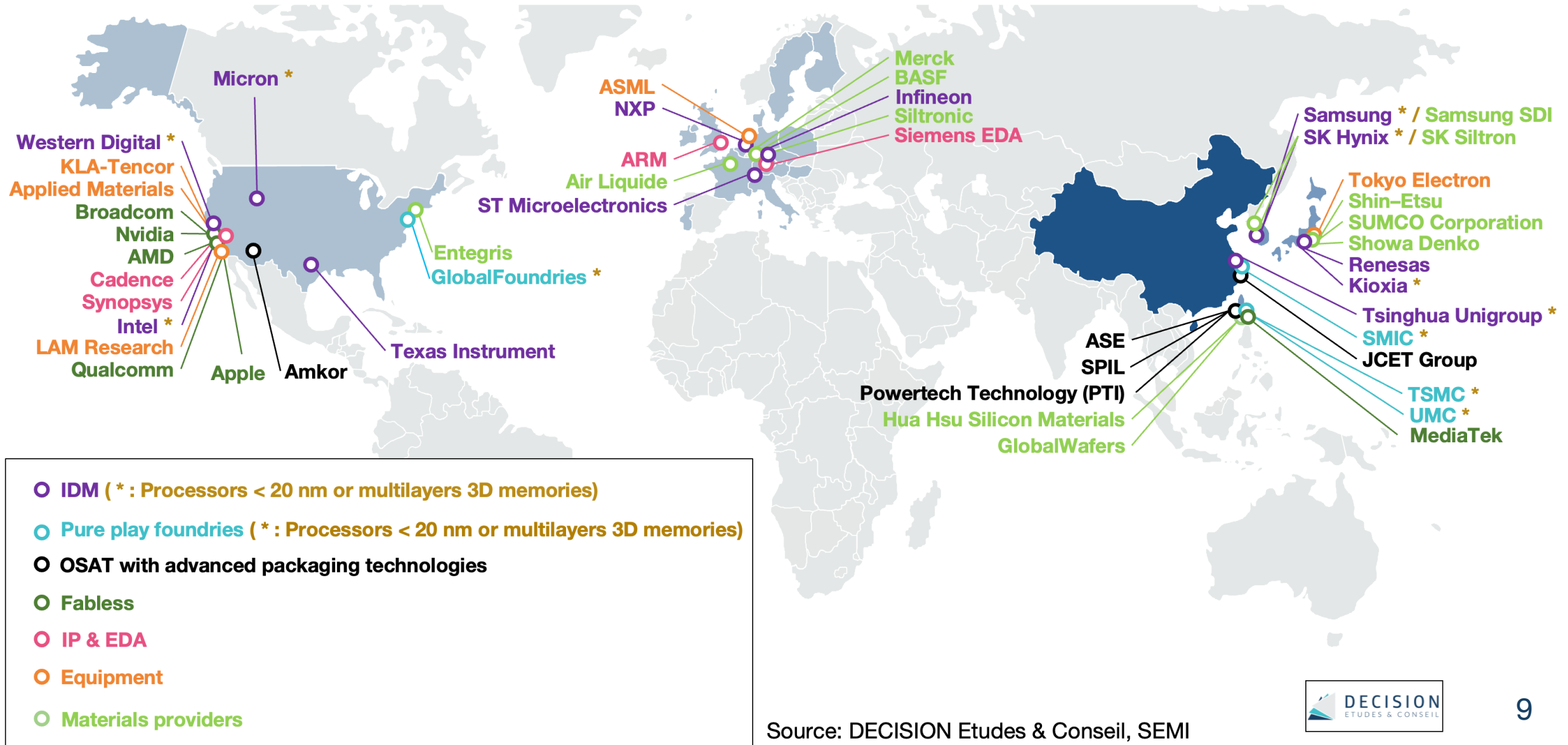
Overview of the Semiconductor Industry

The World's Most Globalized Sector

Semiconductor front-end manufacturing installed capacities

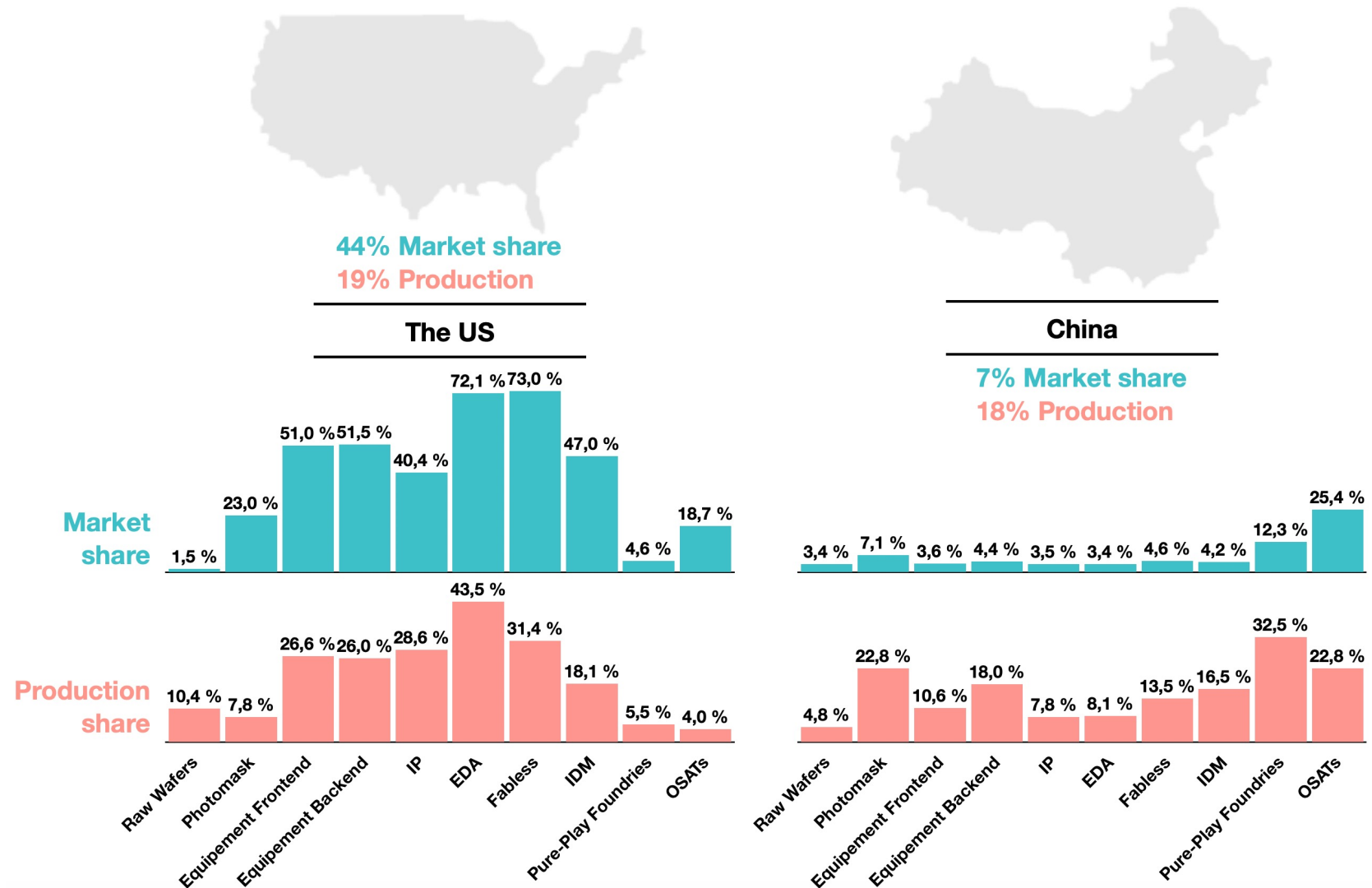


Semiconductor landscape in 2023

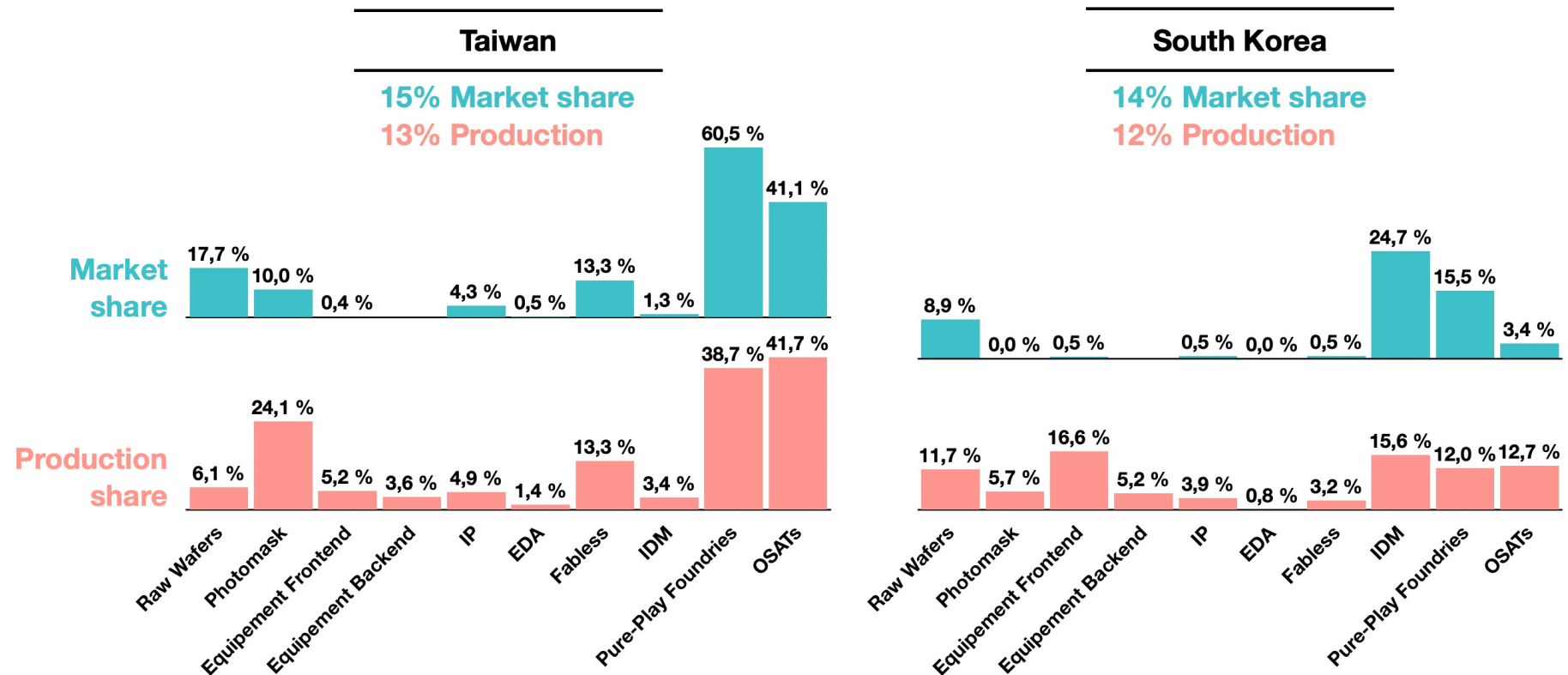


Source: DECISION Etudes & Conseil, SEMI

Positioning of the EU compared to other global countries in the global semiconductor value chain in terms of **market share** and **production share**



Positioning of the EU compared to other global countries in the global semiconductor value chain in terms of **market share** and **production share**

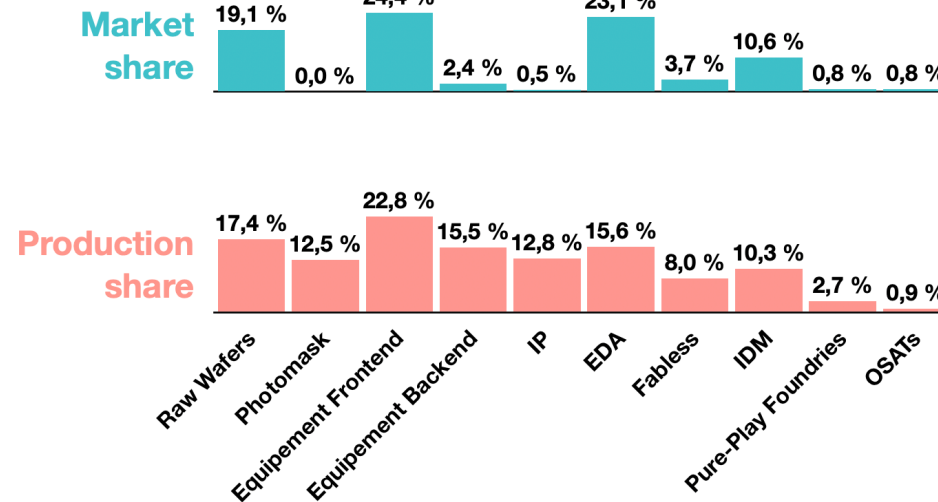


Positioning of the EU compared to other global countries in the global semiconductor value chain in terms of **market share** and **production share**



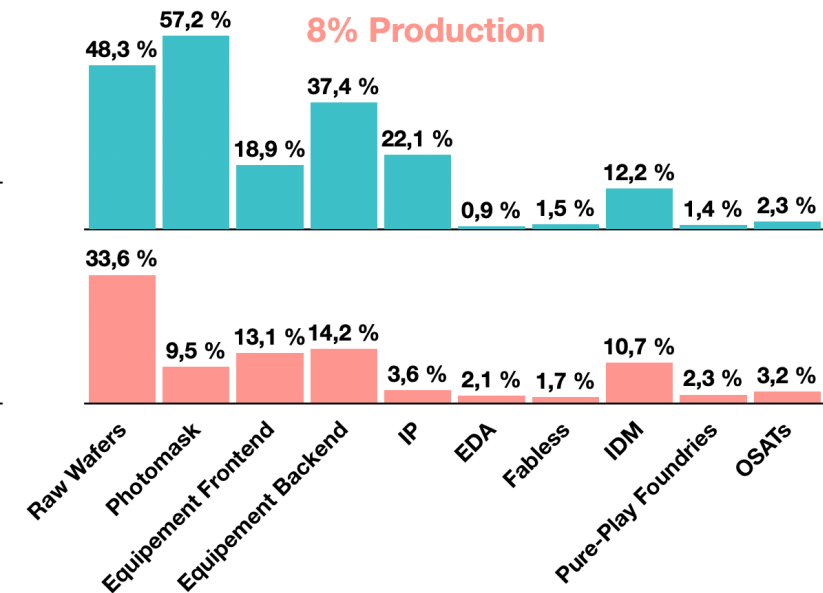
The EU

9% Market share
10% Production

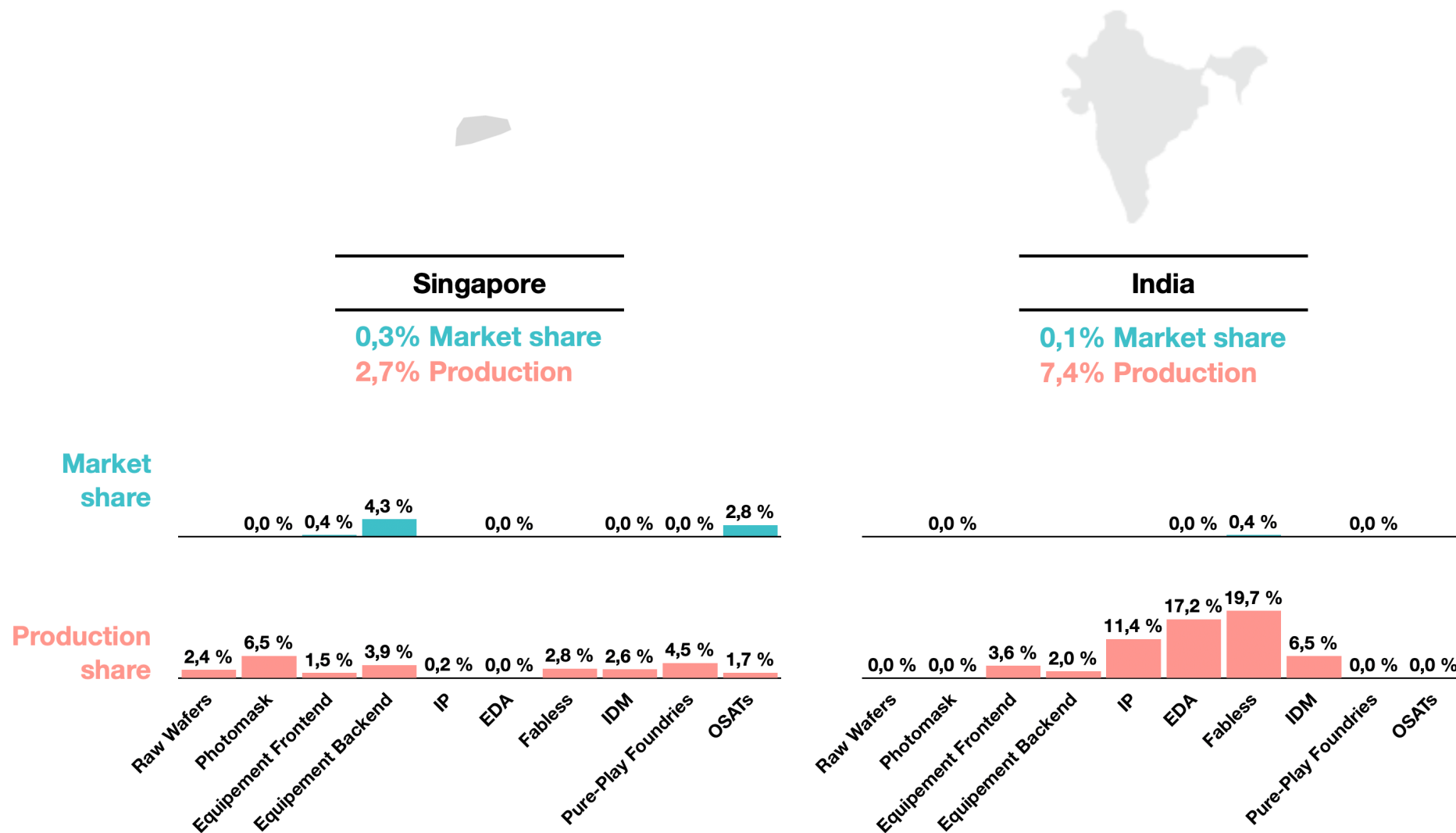


Japan

10% Market share
8% Production



Positioning of the EU compared to other global countries in the global semiconductor value chain in terms of **market share** and **production share**



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The EU Semiconductor Strategy

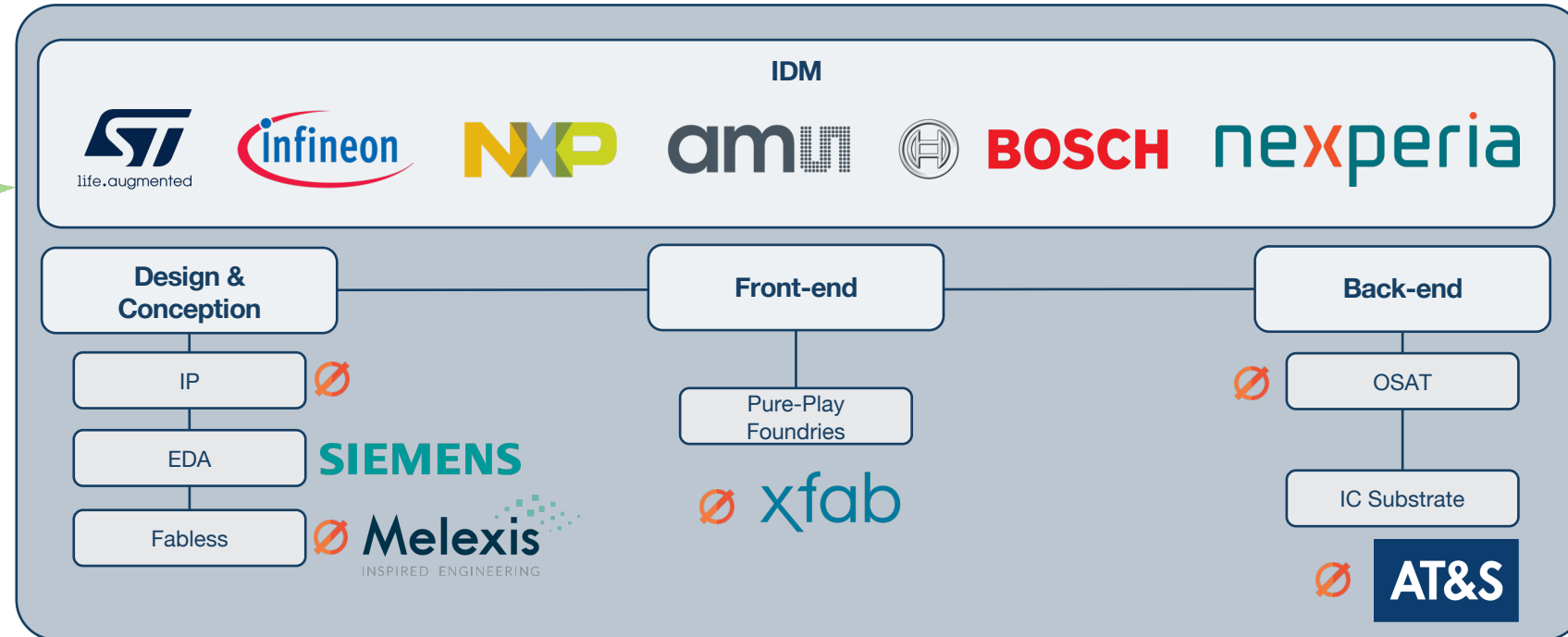
Adapting to a Changing Geopolitical Landscape

EU leaders in the semiconductor value chain

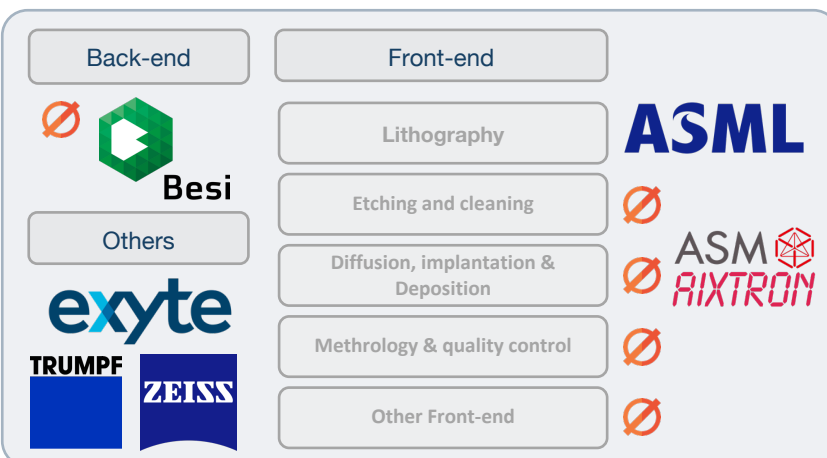
Material



Semiconductor

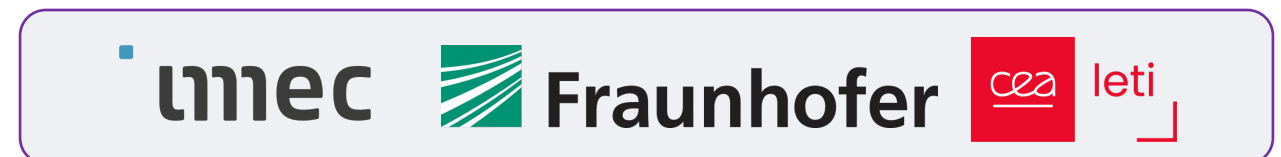


Equipment



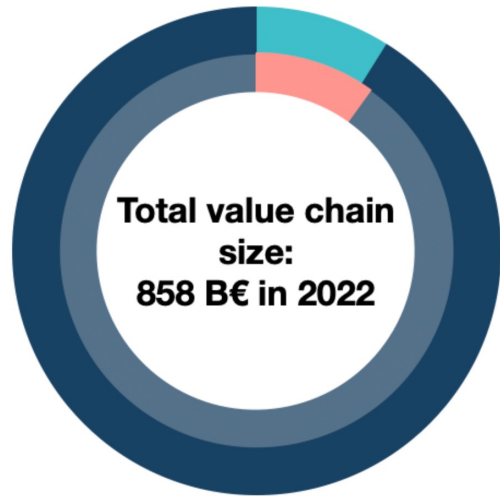
Source: DECISION Etudes & Conseil, 2023

Research & Technology Organizations

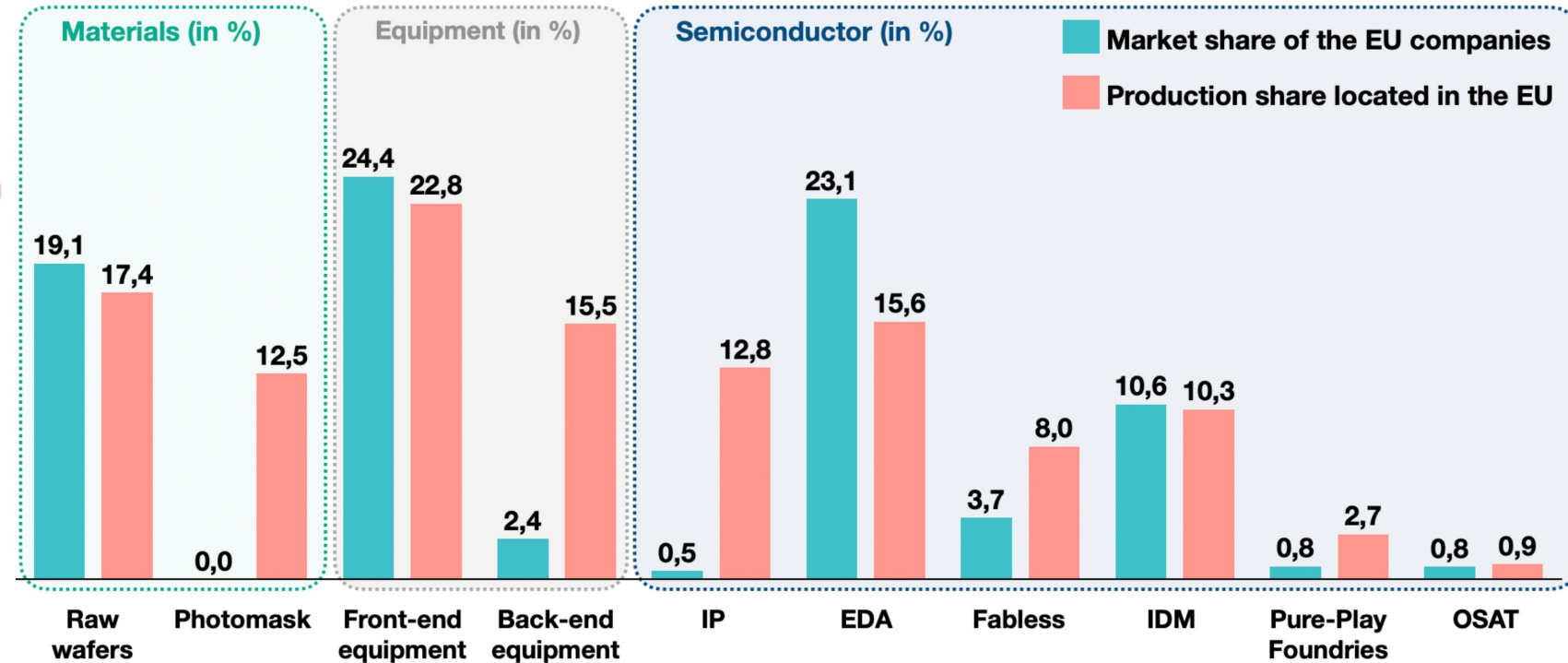


Market and production shares of EU players in 2022

8,9% Market share of the EU companies



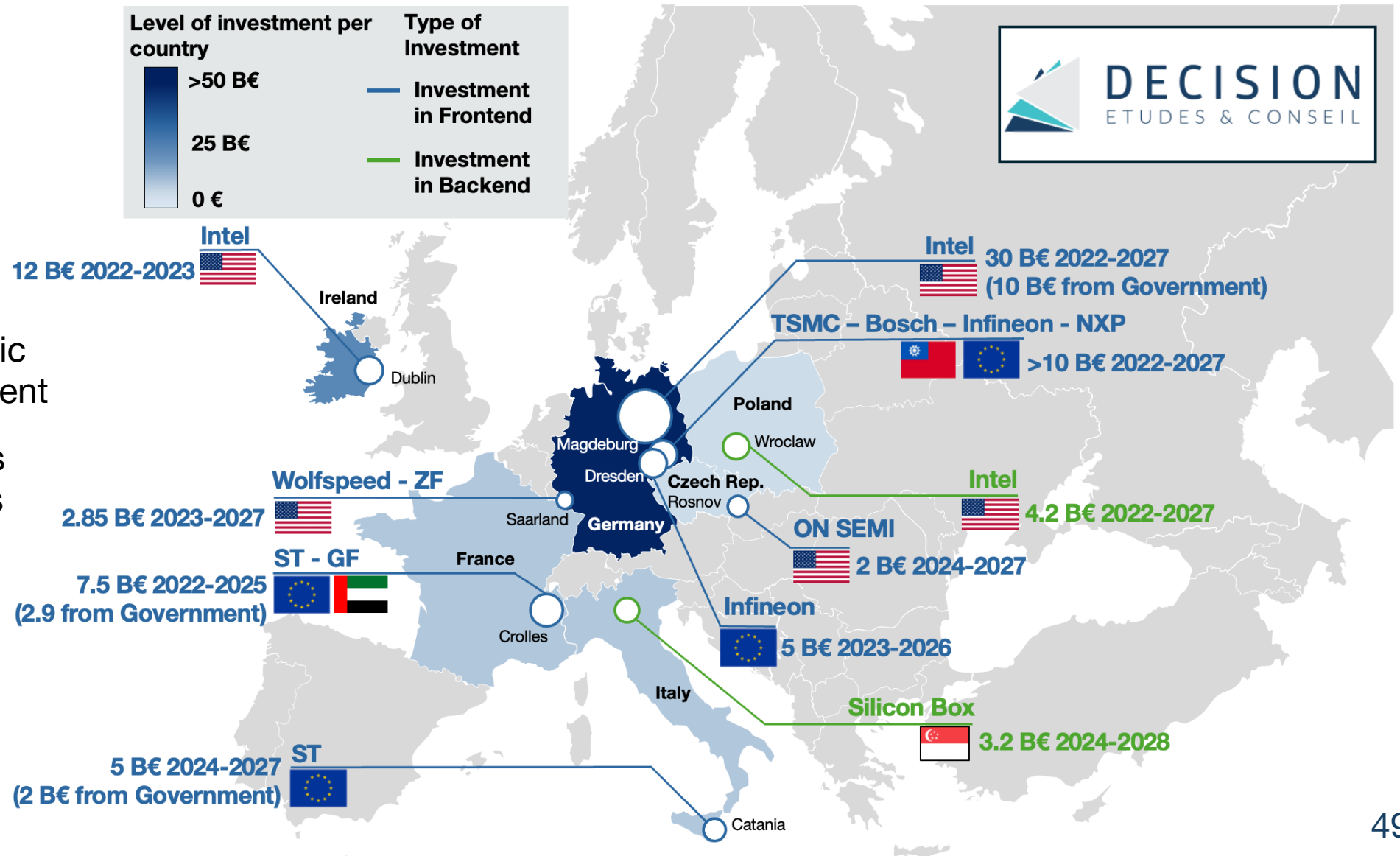
9,9% Production in the EU



Global market size	Raw wafers	Photomask	Front-end equipment	Back-end equipment	IP	EDA	Fabless	IDM	Pure-Play Foundries	OSAT
	16 B€	2.5 B€	96 B€	12 B€	6 B€	8 B€	168 B€	377 B€	127 B€	44 B€

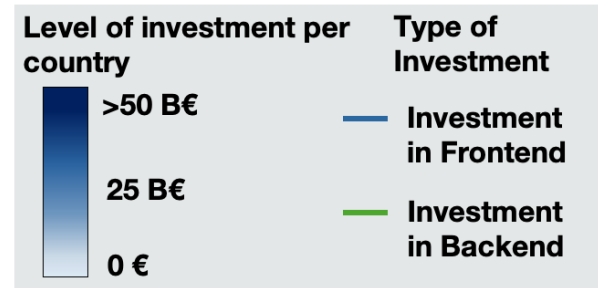
In comparison, the EU account for 17% of the global GDP in 2022³¹.

EU Chips Act - Key investments in the EU (>1B€) in 2024

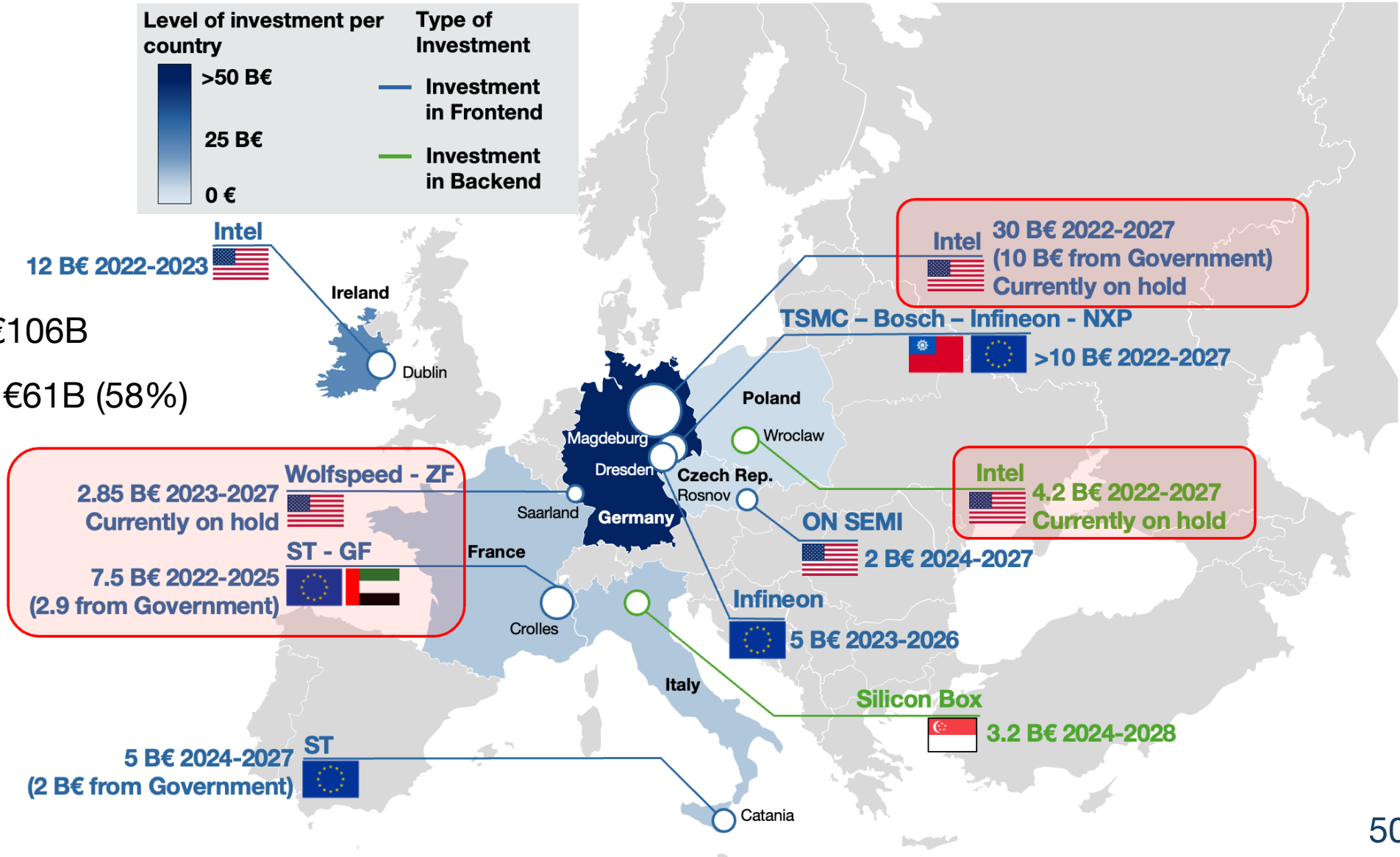


- In total, €106B public and private investment
- 58% of investments from US companies

EU Chips Act - Key investments in the EU (>1B€) in 2025



- Initial investment: €106B
- Actual investment: €61B (58%)



2022

- Chips shortage & subsidies race – EU target of 20% production share by 2030
- Talent gap: 350 000 workers lacking by 2030 (PwC)

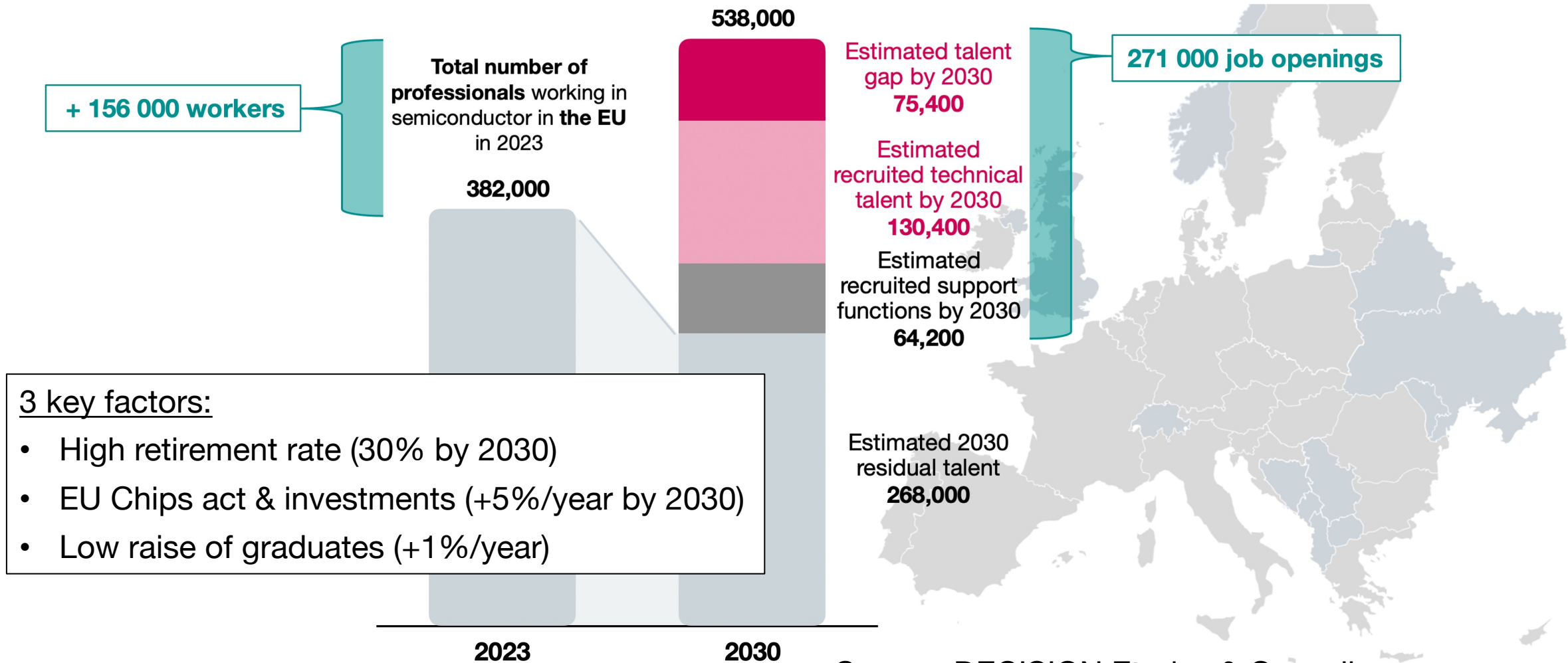
2024

- Realistic investments forecasts by 2030
- Talent gap: 75 400 workers lacking by 2030 (DECISION)

2025

- €45B investments cancelled or delayed + downcycle of EU market
- At least -7000 employees needed
- Talent gap: 68 400 workers lacking by 2030 => 10 000 per year across EU (DECISION)

EU semiconductor talent gap (2023-2030)



Source: DECISION Etudes & Conseil

The ECSA published the Skills Strategy 2024 – What's inside?

- Published in October 2024
- EU Semiconductor talent gap by 2030
- Thorough qualitative analysis of skills Shortage and profiles needs
- Results from the 2024 survey (130 answers)

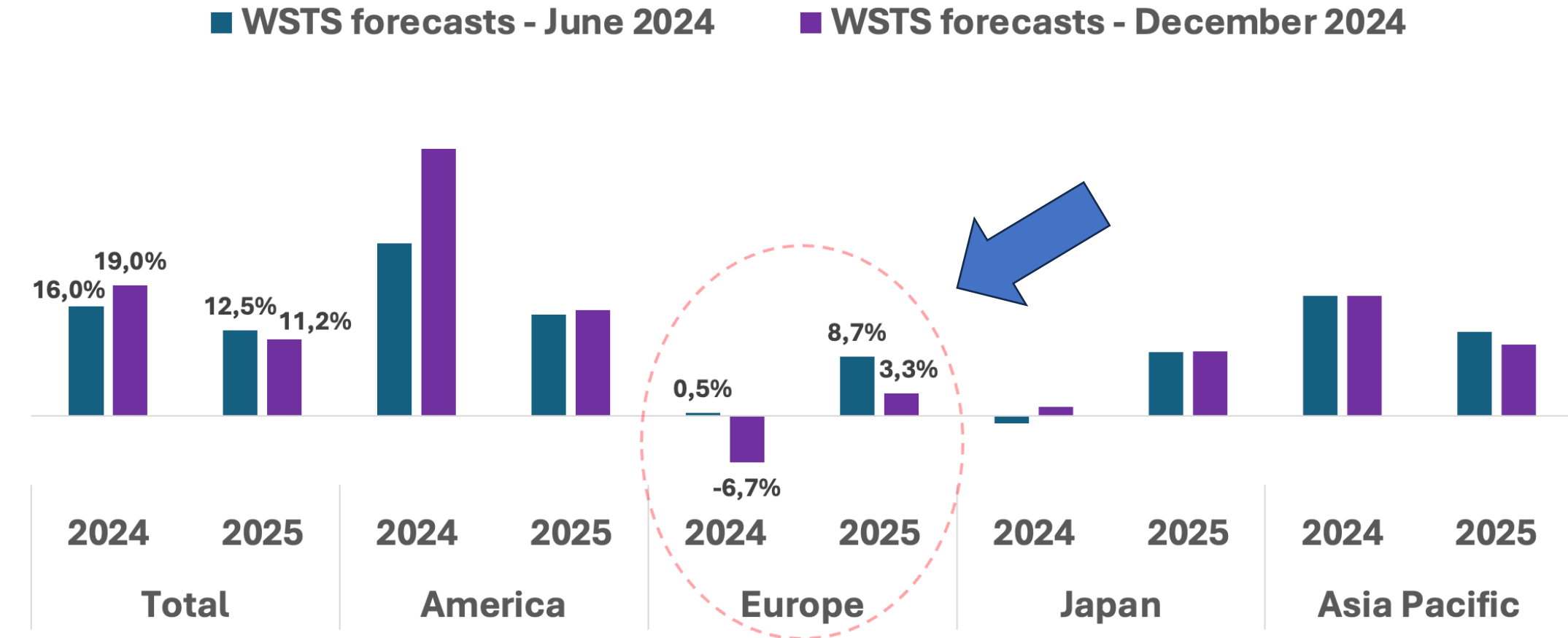


<https://chipsacademy.eu/wp-content/uploads/2024/11/ECSA-Skills-Strategy-2024.pdf>



EU semiconductor talent gap

- Need for talent gap forecast update: Downward revision of semiconductor market growth forecasts, primarily driven by Europe.



Sponsor the Skills Strategy's for 2025

- We are looking for organizations interested in sponsoring this year's ECSA Skills Strategy report. You can support DECISION and ECSA to ensure this year's report includes both *quantitative* and *qualitative* analysis of the talent gap!
- ECSA project proposal included only an update of the *qualitative* assessment of the Talent Gap.
- Without extra support, only the skills survey (*qualitative* analysis) for in-demand and emerging skills needs will be produced in next 3 years.



Sponsorship Packages - Benefits

Supporter Package (5K):

1. Logo placement on the final report
2. Acknowledgment in social media posts and newsletters
3. Early access to the key findings of the final report

Partner Package (10K):

1. All benefits from the Supporter Package
2. Personalized presentation of the final report
3. 1:1 Q&A session with DECISION's team to discuss the findings
4. Priority speaking slots at the ECSA webinars presenting the report



Interested in becoming a sponsor?

- Email us at saint-martin@decision.eu
- Deadline to express your interest: April 2025
- Looking for a custom package? Feel free to also reach out and we can discuss options



DECISION
ETUDES & CONSEIL

Léo Saint-Martin Senior Consultant / Partner

Phone +33 (0) 6 31 18 91 84

Email saint-martin@decision.eu

Website www.decision.eu

Address 17 rue de l'Amiral Hamelin
75116 Paris, France

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