

# **SHARED GAINS, SECURE LINKS: RETHINKING EU-ASIA DIGITAL COOPERATION**

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## SUMMARY

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As the US-China tech rivalry intensifies, the EU faces pressure to secure its position in critical digital value chains. The EU's 2025 International Digital Strategy seeks to deepen digital cooperation with like-minded Asian tech powers, including Japan, South Korea, Singapore and Taiwan, while promoting EU digital standards and competitiveness in AI, semiconductors, 6G and cybersecurity. This CEPS In-Depth Analysis report assesses those partnerships and identifies where they fall short.

EU-Asia digital partnerships operate in a fragmented ecosystem. A wide range of stakeholders pursue overlapping but often misaligned interests, spanning EU institutions (from the European External Action Service to multiple Directorate-Generals), Member States, partner governments divided across ministries and private sector and civil society actors. Fragmentation is compounded by variations in institutional depth (compare South Korea's full Digital Partnership with the EU and Horizon Europe association status versus Taiwan's informal channels), sectoral coverage and regulatory alignment with the EU.

Digital Partnerships are a complex foreign policy instrument. Unlike regional or multilateral frameworks, they lack a unifying institutional or legal architecture to manage tensions between collaboration and competition. Being like-minded does not guarantee aligned interests, and without an overarching coordination mechanism, partnership goals remain underachieved. The EU has signalled its intent to move from a hub-and-spoke model towards a network approach, but this remains aspirational.

The EU should build long-term interest alignment through research and innovation collaboration, which is less divisive than trade and investment in the short term. It should broaden its engagement to partner-country SMEs, start-ups, labour organisations and civil society, as well as develop sectoral 'minilaterals' within Asia synchronised with its geographic partnerships.

For Taiwan, the One China policy means the formal Digital Partnership model is not politically available. Cooperation must proceed through channels that do not require EU-level diplomatic recognition: research and innovation frameworks (with an EC-NSTC co-funding agreement being the near-term priority), institution-to-institution links through ITRI and EARTO, industry engagement through the ECCT and Trade and Investment Dialogue, and Member State bilateral programmes. The focus should be on mapping existing ties, diagnosing gaps and building visibility over time.



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## 1. INTRODUCTION

This report assesses the EU's digital cooperation with five Asian partners – Japan, South Korea, Singapore, India, and Taiwan. It looks at trade, research and innovation (R&I), and regulatory governance, mapping where existing cooperation falls short of partnership ambitions. It then offers a roadmap for deepening digital resilience through bilateral and multilateral engagement in an era of polyalignment and simultaneous derisking.

The Asian partners in this study each face their own structural constraints in engaging with Europe. Japan and South Korea are anchored in a US security architecture that is becoming less reliable and more transactional, pushing them towards diversification while also binding them to US technology supply chains and export control regimes. Singapore is managing to enhance ties with both China and the US; it approaches European partnerships instrumentally, as regulatory and market access levers rather than value-alignment commitments. India's ambition for strategic autonomy creates friction with the EU's agenda of setting regulatory standards even as the two sides deepen their trade and innovation relationship.

By comparison, Taiwan operates under the most acute constraints, as it is excluded from most intergovernmental bodies and formal partnership instruments by the EU's One China policy. Its engagement with Europe depends almost entirely on research institutions, industry associations, and individual Member State governments rather than EU-level frameworks.

Understanding these asymmetries is essential to assessing where greater cooperation is realistic and where it requires new instruments.

This report utilises a combination of primary and secondary sources for doing so. The country assessments are informed by interviews conducted with elites, decision-makers and stakeholders, based in Brussels, Taipei, Tokyo, Seoul and Singapore in 2025-26; the interviewees are listed in the appendix. Documentary analysis covers official texts on EU strategy, bilateral partnership agreements, Horizon Europe participation data, and parliamentary and think-tank analyses from both sides.

The report is structured as follows. Section 2 presents the geoeconomic context, including the structural weaknesses constraining EU digital competitiveness and the strategic case for greater engagement with Indo-Pacific tech partners. Section 3 outlines the EU's architecture for global digital partnerships. Sections 4 and 5 assess each of the five bilateral relationships in turn. Section 6 draws cross-cutting conclusions and sets out recommendations for both the EU and Taiwan.

## 2. GEOECONOMIC BACKGROUND

### 2.1. KEY TECHNOLOGIES IN THE AGE OF CRITICAL SUPPLY CHAINS AND STRATEGIC AUTONOMY

The rapid acceleration of technological innovation, combined with the fast digitalisation of our economies and societies, has transformed digital technologies into powerful enablers of economic growth and competitiveness. They have become essential pillars of sovereignty and resilience, as well as strategic geopolitical assets whose control increasingly determines security, influence, and power in the international system. This evolution over recent years is reflected in the EU's increased focus on international digital engagement.

#### 2.1.1. *Global geoeconomic environment of technology*

Artificial intelligence. Global corporate AI investment reached USD 252.3 billion in 2024, marking a 26% increase from the previous year. The US led with USD 109.1 billion in private investment, significantly outpacing China's USD 9.3 billion. Generative AI is a major growth driver, accounting for over 20% of AI-related investments. While the US excels in innovation, China leads in industrial deployment, particularly in automation, with 54% of global industrial robot installations in 2024. The EU lags in investment, with approximately EUR 9 billion in 2023, despite having strong regulatory frameworks like the AI Act and General Data Protection Regulation (GDPR).

Semiconductors. Global semiconductor sales rose to USD 630.5 billion in 2024, with US firms holding 50.4% of the market share. The EU, with 9.2% of the global semiconductor market, is strong in specialised segments but lacks advanced chip-fabrication capacity. The EU Chips Act aims to increase production to 20% by 2030, but progress is hindered by fragmented national strategies and high energy costs. The industry is dominated by a small number of firms, with the top 5% generating all the economic profit.

Telecommunications and 6G. Telecom revenues reached approximately USD 1.53 trillion in 2024, with a shift from 5G to 6G underway. Europe's Hexa-X programme aims to enhance 6G capabilities, but profit generation is contingent on moving beyond current 5G methods.

Supporting technologies (quantum, cloud and green tech). Investment in quantum computing surged to over USD 1.25 billion in Q1 2025, driven by technological advancements and geopolitical urgency. Cloud infrastructure spending reached USD 94 billion, with US companies dominating the market. Global energy investment is projected to hit USD 3.3 trillion in 2025, with China leading in clean energy investments.

### 2.1.2. *Comparing US and Chinese strategies*

The US employs a market-driven strategy, leveraging private investment and targeted government programmes like the CHIPS and Science Act to foster innovation across various tech sectors.

China's state-directed approach focuses on centralised planning and substantial public investment to achieve global leadership in AI, semiconductors, and telecommunications.

The EU emphasises regulation and sustainability but struggles with fragmented markets and less private capital, hindering its competitiveness in areas such as semiconductors and cloud computing.

Recent [CEPS analysis](#) that maps the technology specialisation and relatedness of the EU and selected global partners further highlights the structural challenges for Europe. Although the US and China dominate many emerging technologies in terms of patent activity, venture capital investment, and commercial scale-up capacity, the EU continues to perform strongly in scientific research and academic output. This divergence between scientific excellence and technological-commercial leadership represents one of the defining features of the European innovation system. It underlines the importance of strengthening the link between Europe's research base and industrial innovation ecosystem while preserving open international networks for collaboration with technologically complementary partners.

## 2.2. THE ROLE OF TECH MIDDLE POWERS

The EU has several structural weaknesses in competitiveness that constrain its ambitions in digital and advanced technology sectors. US subsidy programmes, most notably the CHIPS and Science Act, have motivated European firms to relocate investments across the Atlantic, triggering a drain of both capital and engineering talent that Europe has struggled to reverse. At the same time, China's state-led industrial subsidies allow its manufacturers to dominate global markets through sustained price competition, generating margin pressures for European producers and deepening European dependency on Chinese inputs across multiple technology supply chains. Within the EU itself, inconsistent implementation in national policy undermines the collective force of shared initiatives: execution of the EU Chips Act, for example, has varied across Member States, diluting its intended effect on European semiconductor capacity and competitiveness.

More generally, Europe's strategic autonomy is constrained by its reliance on US digital platforms for cloud infrastructure, software, and AI services, and on Chinese supply chains for critical hardware components. This creates a double dependency that limits the EU's room for manoeuvre in both commercial and geopolitical terms. Compounding

all of this is a persistent talent shortage: the EU produces insufficient numbers of skilled engineers in advanced technologies, yet relatively restrictive immigration frameworks have made it difficult to compensate through international recruitment. This contributes to the brain drain and further concentrates frontier innovation capacity outside Europe.

Europe's current dependence on the transatlantic relationship and its exposure to US-China technological competition points to a fundamental need for a more diversified strategy on digital partnerships. It is also becoming increasingly important for Europe's long-term resilience. As [recent CEPS analysis](#) underlines, international technological complementarities create strategic opportunities for cooperation with technologically advanced and politically aligned Indo-Pacific partners, particularly in semiconductors, AI, advanced manufacturing, quantum technologies, and cybersecurity. By engaging with a broader network of trusted partners, the EU can reduce excessive dependencies on single suppliers while strengthening its position in critical digital value chains. Rather than relying exclusively on 'made in Europe' solutions, a strategy combining openness with diversification may allow Europe to accelerate innovation while maintaining strategic control in key technologies.

Technologically advanced and politically aligned partners in the Indo-Pacific offer the most promising prospects for this diversification, especially those with leading semiconductor capabilities whose integration into European supply chains would underpin long-term technological resilience. The complementarities between European and Indo-Pacific technology portfolios present concrete opportunities across several partnerships.

For example, deeper EU-Japan cooperation on trusted supply chains, advanced manufacturing, cybersecurity, and next-generation computing would leverage Japan's equipment and materials strengths alongside Europe's research infrastructure. Increased EU-Korea engagement on semiconductors, telecoms, AI-enabled industrial systems, and digital standards would build on the most institutionally complete partnership the EU has in Asia, one that has already demonstrated what Horizon Europe association and a concluded digital trade agreement can deliver. Enhanced EU engagement with Singapore as a regional hub for digital governance cooperation, start-up ecosystems, and trusted technology deployment would extend European regulatory influence into Southeast Asia in ways that bilateral partnerships with larger economies cannot replicate.

While the constraints of the EU's One China policy limit the formal architecture available, these patterns of semiconductor interdependence, technological complementarities, and supply chain resilience make a compelling case for sustained and closer EU engagement with Taiwan in advanced semiconductor technologies and digital manufacturing. In this domain, Taiwan's strategic importance to Europe is significant and underrepresented in terms of formal institutional recognition.

### 3. THE EU'S GLOBAL PARTNERSHIPS AS PART OF OPEN STRATEGIC AUTONOMY

As the ongoing tech competition between the US and China intensifies, the two powers are adopting distinct strategies to assert technological dominance. The EU is increasingly exposed to the negative spillover effects of this rivalry. To attract talent, capital, and technology capacity from advanced economies (including Taiwan, Japan, and South Korea), the US is deploying a mix of industrial policy incentives, strategic alliances, and trade pressure. These include the CHIPS and Science Act subsidies, targeted export controls, and bilateral investment frameworks. While some of these moves reflect a coherent strategic logic, others appear driven by short-term domestic pressures, making US policy ever less predictable for third-country partners. As a result, the EU's own competitiveness is being undermined. This trend poses a growing strategic risk, as Europe faces the threat of being squeezed out of critical value chains and falling behind in the global race for technological leadership.

The EU's Digital Compass 2030, launched in 2021, aims to strengthen internal digital development and competitiveness. Currently under revision to align with the EU's Multiannual Financial Framework and evolving geopolitical priorities, the Compass remains one of several strategy documents shaping the EU's digital direction. It has targets across four salient areas: digital skills, digital infrastructure, business transformation, and digital public services.

The [International Digital Strategy](#) ('Strategy'), published in June 2025, builds on this internal foundation by addressing Europe's external competitiveness and strategic autonomy in crucial digital domains. The Strategy seeks to (re-)position Europe as an actor of relevance in the digital realm by building strategic partnerships and promoting its technological standards, and integrating digital priorities into foreign, development, and security policy. Its core features include deepening digital partnerships with further like-minded countries and expanding digital diplomacy through specialised envoys and hubs to those countries and regions that cannot formally partner up. It advances the 'EU tech offer' in areas like AI, 6G, and cybersecurity, shaping global digital governance through multi-stakeholder engagement. The Strategy emphasises economic security, supply chain resilience, and aligning internal-external digital agendas.

However, it has notable shortcomings: limited coordination among EU institutions and Member States, under-resourced delegations in important regions and a perception of declining attractiveness (e.g. by India). There is also insufficient investment in digital initiatives under the Global Gateway, the EU's connectivity-focused strategy for external investment, which combines public and private funding to build digital, energy, and

transport infrastructure in partner countries. Out of the 256 initiatives highlighted in the [consolidated list of Global Gateway flagship projects](#) for 2023-26, only 31 projects (12%) focus on the digital sector, despite it being one of the five priority areas. Other challenges the EU faces include overregulation, barriers to attracting global talent, and slow progress in emerging technologies such as biotech and quantum computing.

The Strategy was developed in response to escalating trade tensions and increasing hybrid threats, emphasising that technological competitiveness is both an economic and security imperative. The Strategy aims at both competitiveness and normative leadership by positioning the EU as a leader in critical technologies such as AI, semiconductors, digital trade, and cybersecurity. It promotes EU digital standards internationally and advances digital development aid by supporting digital infrastructure and capacity-building projects in Global Gateway partner countries.

Already in 2021 the EU highlighted the need for strong international partnerships on digital technologies in its [Digital Compass](#) and committed to enhancing its digital partnerships in the Indo-Pacific region in its [strategy for cooperation in the Indo-Pacific](#). In parallel, the first ever debate in the Foreign Affairs Council on the geopolitics of digital technologies ([July 2021](#)) paved the way for EU digital diplomacy, whose priorities were established by successive Council Conclusions in [July 2022](#) and [June 2023](#). The focus has since been on expanding the EU's external digital engagement based on a human rights-based and human-centric approach, enhancing digital partnerships, alliances and the Global Gateway, negotiating digital trade rules, and increasing multilateral collaboration on digital technologies in international fora.

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The EU's International Digital Strategy consolidates the progress made over the last few years and responds to intensifying geopolitical competition, widening innovation gaps, and growing vulnerabilities linked to technological dependencies. It sets out three overarching objectives to guide the EU's external digital action: boost EU tech competitiveness, enhance the security and resilience of digital infrastructure and supply chains, and shape global digital governance. As the ongoing tech competition between the US and China intensifies, the two powers are adopting distinct strategies to assert technological dominance. The EU is increasingly exposed to the negative spillover effects of this rivalry. To attract talent, capital, and technology capacity from advanced economies (including Taiwan, Japan, and South Korea), the US is deploying a mix of industrial policy incentives, strategic alliances, and trade pressure. These include the CHIPS and Science Act subsidies, targeted export controls, and bilateral investment frameworks. While some of these moves reflect a coherent strategic logic, others appear driven by short-term domestic pressures, making US policy ever less predictable for third-country partners. As a result, the EU's own competitiveness is being undermined. This trend poses a growing strategic risk, as Europe faces the threat of being squeezed out of critical value chains and falling behind in the global race for technological leadership.

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The priority areas of the Strategy – secure connectivity, emerging technologies (AI, 5G/6G, semiconductors, and quantum), cybersecurity, digital public infrastructure, and online platforms – largely correspond to cooperation areas covered by EU digital partnerships, by promoting human-centric, democratic standards.

Strengthening the EU's network of digital partnerships is a prominent feature in the Strategy. Following the launch in 2021 of the [EU-US Trade and Technology Council](#) (TTC), the first of a series of partnerships at the highest level, the [EU-India TTC](#) was launched in 2023. [Digital partnerships](#) have been signed with Japan (2022), South Korea (2022),

Singapore (2023), and Canada (2023). The EU also maintains Digital Dialogues (with Brazil, Mexico, Argentina, Australia, and the Western Balkans) and Cyber Dialogues (with India, Japan, the Republic of Korea, Brazil, the US, Ukraine, and the UK). The EU's digital cooperation with enlargement and neighbourhood countries is based on instruments that advance the harmonisation of key digital policies, which are particularly needed for the gradual integration of candidate countries into the Digital Single Market.

The [Global Gateway](#) also promotes international partnerships and investments in digital infrastructure, with the aim of enhancing the EU's role as a trusted partner in global connectivity. Africa clearly dominates the Global Gateway's geographical coverage. Yet the programme covers all regions, through the [EU-Latin America & Caribbean Digital Alliance](#); the Digital Economy Packages implemented with Nigeria, Colombia, the Democratic Republic of Congo, Kenya and the Philippines; and specific Team Europe Initiatives launched in Asia. Examples of the latter include [EU-ASEAN Sustainable Connectivity](#), the [EU-Africa-India digital corridor](#) and the [Team Europe Central Asia initiative](#).

In 2021, the EU's [Global Approach to Research and Innovation](#) underlined the need to enhance the EU's joint work with major science powers such as Japan, South Korea and Singapore (including through association to Horizon Europe), as well as with India. Since then, interest in association to Horizon Europe has increased to 22 [associated](#) third countries. The latest is the Republic of Korea, while association negotiations are progressing with Japan and exploratory talks have been launched with Singapore (2024), India (2026) and Australia (2025). In addition, the [Digital Europe](#) programme opens new avenues for international cooperation on R&I and the deployment aspects of digital technologies, as tying digital partnerships ever more tightly to such cooperation is a promising step forward. The launch of [four jointly funded projects](#) in semiconductors as a deliverable of the EU-Korea Digital Partnership clearly illustrates the potential of R&I collaboration. There have also been dedicated calls launched by the European High Performance Computing (EuroHPC) Joint Undertaking to solidify joint [EU-Japan](#) cooperation on quantum computing and [EU-India](#) work on HPC.

Beyond the immediate research outputs, association to Horizon Europe increasingly carries broader strategic significance. As underlined in recent CEPS analysis, association should be understood less in terms of short-term financial returns and more as a strategic investment –for both the EU and the partners – in access to high-quality research networks, large-scale collaborative projects, frontier infrastructure, and talent ecosystems. In this sense, Horizon Europe is progressively evolving from a primarily European programme into an extended network of trusted scientific and technological partners. Across associated and prospective partner countries alike, participation is

increasingly linked not only to scientific excellence, but also to industrial competitiveness, technological resilience, and geopolitical influence.

The question of Horizon Europe association is directly relevant to EU-Taiwan digital relations. For comparative context, the following discussion summarises the current association status of the EU's other Asian digital partners.

The [Republic of Korea](#) became the first Asian associated country, with [association formalised](#) in July 2025 and transitional participation from January 2025. This development complements greater EU-Korea cooperation on strategic technologies and the [EU-Korea Digital Partnership](#), where joint work covers areas such as [semiconductor projects](#) under Horizon Europe's Chips Joint Undertaking, [quantum](#) calls, and 2026 6G calls under the [Smart Networks and Services Joint Undertaking](#).

Japan and the EU reached an [agreement in principle](#) on the terms of association in December 2025, with signature [expected in 2026](#) and transitional arrangements from January 2026. However, Japan's [participation](#) to date remains relatively modest, raising questions about the scale of future engagement as [association is limited to a shrinking pillar II](#) and will need to be renegotiated for Horizon Europe's successor after 2027. Association reinforces the [EU-Japan Digital Partnership](#), which delivered on targeted R&I cooperation on [semiconductors](#), [quantum computing](#), and AI-powered 6G planned for 2026.

The recent 16<sup>th</sup> [EU-India Summit in New Delhi](#) marked a significant deepening of relations, with the conclusion of an EU-India Free Trade Agreement (FTA), the launch of an EU-India Security and Defence Partnership, and renewed commitments on emerging and critical technologies, innovation, and research. Leaders extended the EU-India Agreement for Scientific and Technological Cooperation until 2030 and launched exploratory talks on India's possible association to Horizon Europe. Any future association would require detailed negotiations on scope, financial contributions, and legal arrangements.

In the meantime, India engages actively with Horizon Europe under its 'Open to the World' framework. While Indian entities typically cover their own costs, co-funded mechanisms play an important role in sustaining participation. As an example, in 2023-24 India earmarked [11 Horizon Europe calls](#) for co-funding across priority areas, including AI and robotics, health, the climate transition, renewable energy, the circular economy, and ocean research. These arrangements enhance incentives for collaboration in areas of shared strategic interest.

In 2025, the [EU-India TTC](#) launched [joint research initiatives under Horizon Europe](#) in the areas of marine plastic litter and waste-to-renewable hydrogen, mobilising about

EUR 41 million. A specific co-funding mechanism has been established for [Marie Skłodowska-Curie Actions \(MSCA\) Staff Exchanges](#), enabling Indian research organisations (through the Council of Scientific and Industrial Research) to top up successful MSCA proposals. Together, these initiatives illustrate how structured co-funding can deliver tangible R&I cooperation in the absence of formal association.

[Singapore](#) expressed interest in exploring association to Horizon Europe in April 2024, and in November that year the Council authorised the Commission to [open negotiations](#) – an important procedural step towards potential association. Although no agreement has yet been concluded, Singapore has taken steps that complement the association process, such as launching, in December 2025, the [Singapore-Horizon Europe Complementary Fund](#) to [support Singaporean researchers'](#) participation in Horizon Europe. This new complementary fund will provide financial support and [boost the participation of researchers](#) based in Singapore in Horizon Europe projects. Since 2023, the [EU-Singapore Digital Partnership](#) has been active in progressing cooperation in such areas as AI, online safety and cybersecurity, with prospects for collaborative research under Horizon Europe.

The geopolitical context further reinforces the importance of digital and R&I partnerships, including through association to Horizon Europe. Intensifying technological rivalry, competition for highly skilled talent, and growing vulnerabilities in critical supply chains have increased the strategic value of trusted international R&I networks. In fields such as AI, semiconductors, quantum technologies, and clean technologies, no single actor possesses all relevant capabilities domestically. The integration of additional technologically advanced partners into European R&I frameworks would therefore not simply increase the volume of research activity, but could qualitatively strengthen Europe's innovation ecosystem through complementarities in expertise, industrial capacity, and talent.

The following priorities for cooperation with key Asian partner countries form the basis for the ongoing and planned [actions in the International Digital Strategy](#):

- the development of open-source building blocks for EU Digital Wallets with Japan, India, and Singapore;
- mutual recognition of electronic signatures and standardisation of digital identity solutions with Japan and India;
- cooperation with Japan, South Korea, India, and other partners on safe and trustworthy AI development;
- deeper cyber dialogues with Japan, India, South Korea, Singapore, and other global partners;

- support for Arctic connectivity (Japan) and aligned 6G research projects with Japan, South Korea, and Taiwan;
- joint semiconductor, quantum, and 6G initiatives with Japan and South Korea;
- early-warning mechanisms on supply chains (Japan);
- semiconductor talent programmes with India under the EU-India TTC; and
- at the multilateral level, participation in the G7 Semiconductor Point of Contact Group and the World Semiconductor Council (with Japan, South Korea, Taiwan, and China).

The proposed digital partnership network is another strong feature of the Strategy. By enabling systematic information exchange, joint R&I projects, and regular political and technical meetings, the network would make the EU's digital partnerships more coherent, strategic and impactful. The question remains of how this would work in practice, as partners differ widely in values, regulatory models and strategic priorities.

Despite European successes in areas like semiconductors (e.g. ASML) and 5G/6G patents, the EU remains heavily dependent on foreign providers, with over 80% in practically all layers of the technology stack. The US dominates AI foundation models (above 70%), cloud computing (almost 70% of the market share in Europe), and global R&D spending in software and electronics, while [China](#) has rapidly caught up in many sectors. This high level of external dependence underscores the need for the EU to expand strategic digital partnerships, especially with trusted and technologically advanced countries.

With Asian partners in particular, there is a lot to build on, given the complementary strengths of the EU and its partners, existing digital partnership frameworks, and shared goals for secure, trusted, and sustainable digital transformation. Furthermore, the EU has substantive [technological complementarities](#) with India, South Korea, and Singapore in advanced digital fields such as AI, IoT, blockchain, cybersecurity, quantum computing, and cloud/edge computing, and moderate complementarities with Taiwan in biotech and medical technologies.

Beyond the purely bilateral aspects of partnerships, the EU also positions digital partnerships and dialogues as tools for coordination and coalition-building in key international institutions. Among them are the UN (where the focus will be on following up the Global Digital Compact), G7 (e.g. the G7 Hiroshima AI Process), G20 (i.e. work on digital public infrastructure), OECD, Council of Europe, and global internet governance bodies (i.e. to review negotiations of the World Summit on the Information Society – the WSIS+20).

Digital trade is highly important for EU digital relations with Asian powers. The EU has concluded free trade agreements with comprehensive chapters on digital trade with the UK, New Zealand, and Chile, while negotiations are ongoing with India, Indonesia, Thailand, the Philippines, and Malaysia. An EU-Singapore Digital Trade Agreement was signed in 2025, as was an EU-Korea Digital Trade Agreement. Rules on cross-border data flows with Japan, complementing the EU-Japan FTA, entered into force in July 2024.

Partnerships and their various modalities are at the core of the EU's International Digital Strategy. The EU recognises that to make a real impact in global and European digital affairs, it must act jointly – first through close coordination between the EU and its Member States, and then together with key partners worldwide.

The Strategy therefore emphasises the need to launch new digital partnerships and dialogues as part of its network, in a Team Europe approach, ensuring close cooperation with Member States, industry, stakeholders, and partner countries. It also highlights the need to strengthen Team Europe coordination in digital initiatives under the Global Gateway, including joint planning and financing with Member States and EU financial institutions.

And finally, the proposed [EU Tech Business Offer](#) will only succeed if designed and implemented jointly by the EU and its Member States. The offer aims to support EU tech companies' access to partner-country markets and promote the deployment of secure and trusted connectivity, digital public infrastructure, AI and software solutions. It is to be tailored to partners' needs and embedded in the Team Europe structures already established in many countries. For countries where strategic digital partnerships exist or are being negotiated, the offer would be integrated into the respective partnership frameworks, although the concrete implementation of this ambition has not yet been clarified.

The European Council's recent [Conclusions on advancing the International Digital Strategy for the EU](#) signal Member States' push to make the EU's global digital engagement strategic for its competitiveness, security, and sovereignty. They add to the call for action-oriented digital diplomacy, recognising that Europe must proactively lead on technology solutions, global partnerships, standards, norms, and governance frameworks.

Ultimately, the EU's commitment to advancing its role in international digital affairs can only succeed as a joint endeavour. Close coordination between the EU institutions, Member States, and partner countries will be essential to ensure that shared priorities translate into tangible progress.

## 4. EU-ASIA DIGITAL RELATIONS: PROSPECTS AND CHALLENGES

### 4.1. JAPAN PARTNERSHIP

This section begins with a review of Japan's altered domestic and international politics, including the changing view of the role of the Japanese military, because it is impossible to understand prospects for cooperation without first establishing this essential context.

#### *4.1.1. Substantial changes in the political and geopolitical context*

The election of Sanae Takaichi as Prime Minister and as leader of the Liberal Democratic Party in the Japanese elections of October 2025, together with her even more impressive victory in the snap elections of February 2026 with the largest ever supermajority, have significantly transformed Japanese politics. That Takaichi is the first woman to hold these positions is striking, but much more important is that her political positioning fairly far to the right represents in part a break with the past.

In terms of defence, she places far more emphasis than her predecessors on strengthening the military to resist potential incursions from the People's Republic of China (PRC) and is more overtly supportive of Taiwan. In particular, she advocates a first-ever amendment to the Japanese constitution to broaden the role of the military in Japan (revising Article 9, which renounces the use of military force), and to expand the military budget from the relatively paltry current level of 1.4% of GDP to a target of 2%. She reportedly feels that this is necessary as Japan is confronted by an assertive China, an unpredictable North Korea, and a complicated relationship with Russia. In the evolving geopolitical environment, these views are now generally popular in Japan.

Her positions on the economy are broadly aligned with those of her former boss, Shinzo Abe, who sought to shake up the slumbering Japanese economy by means of a combination of monetary and fiscal policy, stimulus through government spending, and structural reforms. She is viewed as being socially conservative, with a hard-line opposition to immigration and same-sex marriage.

Some of her views are likely to complicate Japan's international relations, especially with the PRC and to some extent with Korea. Meanwhile, her chummy relationship with US President Donald Trump may be advantageous for Japan in the short run, but may complicate relations with liberal democratic allies.

Relative to cooperation with Taiwan, however, her strong support may represent an opportunity to enhance relationships in many different ways.

### 4.1.2. *Japan's digital trends and technological priorities*

Starting with overall economic indicators, it is clear that Japan is an economic titan. It is the world's fourth largest economy by GDP, and fifth largest by PPP-adjusted GDP. Its labour force is the tenth largest in the world with nearly 70 million workers.

As an exporter and importer, however, Japan punches a bit below its weight. Despite obvious strengths in exports of automobiles and of consumer electronics, Japan is only the world's eighth largest exporter and sixth largest importer. Some Japanese digital products and services suffer from a surprising 'Galapagos Effect', where products created in Japan tend to stay in Japan. In the recent past, for instance, Japan produced some of the best feature phones in the world, but the market for mobile handsets was dominated first by European manufacturers and then by handsets and tables manufactured in China (and increasingly in India).

Turning now to the digital sphere, Japan was fairly early to deploy DSL-based fixed broadband in volume, and then shifted dramatically to fast and technically advanced fibre-to-the-building (FTTB) technology. A decade ago, many experts argued that Japan (together with Korea, which has similarly advanced fast FTTB) would massively outperform the EU in the digital sphere if the EU failed to keep up. These predictions, however, proved to be misguided – Japan's high-capacity networks were fairly empty of traffic for many years and there is little or no evidence that the widespread availability of fibre-based fixed broadband transformed Japanese technology or society to any significant degree. The evidence suggests instead that the widespread availability and adoption of high-speed fixed broadband eliminated one potential bottleneck, but that many others remained.

### 4.1.3. *Digital governance and key stakeholders in Japan*

Japan is a liberal market economy, but central planning initiatives for digitalisation have been a standard feature for decades.

Historically, the bulk of planning for the digital world has tended to take place in what now is the Ministry of Economy, Trade and Industry (METI, formerly the MITI), but today, it is more widely distributed. For example:

- the METI has the lead role for industrial policy and the green transition, with a supporting role for AI;
- the Digital Agency has the lead role for overall digitalisation and for AI;
- the Ministry of Internal Affairs and Communications has the lead role for telecommunications and for 6G;

- the National Security Secretariat has the lead role for economic security;
- the Cabinet Office has the lead role for R&D and innovation and space, and a supporting role in economic security.

In terms of private firms, the technology sector tends to be driven by a small number of very large firms, mainly operating in the automotive, tech/electronics and financial industries, and as trading houses. Noteworthy firms in terms of revenue include Toyota, the Mitsubishi Group, Sony, SoftBank, Hitachi, Sumitomo, Honda, Itochu, and Nintendo.

#### *4.1.4. Japan's relations with the US, China and other tech powers*

Japan's relationship with China has always been delicate. The two have a complex historical relationship marked by alternating periods of cooperation and conflict, most recently and most notably due to Japan's brutal invasion of China in World War II.

Takaichi's remarks in November 2025 that a Chinese blockade or invasion of Taiwan would constitute an 'existential threat' to Japan, thus providing a basis to activate the Japanese armed forces, led to intense posturing by both sides. The Taiwan issue clearly represents a red line for the PRC.

Takaichi has been explicit in her support for Taiwan – more so than her predecessors. But she has pragmatically avoided the issue since the blow-up.

Her revisionist views about World War II represent an additional potential flash point with the PRC. She has characterised Japan's invasion of China as a 'defensive war', thus downplaying Japan's brutal aggression.

The relationship with the US has been profoundly transformed. The historically close alliance is simultaneously closer and more distant.

The US has functioned as the guarantor of Japan's security since 1945, much as it has with Europe. As with Europe, the US is offering only ambiguous and uncertain security assurances today. The re-thinking of Japanese security needs that was already in progress for many years has thus taken on new urgency. Japan's growing recognition that it needs to be able to defend itself, is now clear, and it implies revision of the restrictions on military action that are embodied by Article 9 of the Japanese constitution. As with Europe, the US welcomes Japan taking more responsibility for its own military defence.

Takaichi's strongly conservative positions are somewhat aligned with those of Trump. Indeed, Trump supported Takaichi in the snap elections – an unusual step for a US president. Moreover, there was much positive rhetoric at their first meeting after Takaichi became prime minister.

As with other foreign leaders, however, the actions of this US administration bear little relationship to its words. The meeting was accompanied by an increase of US tariffs on Japanese goods, and a threat of further increasing tariffs to 25%. In the end, the US agreed to tariffs on Japanese goods of ‘only’ 15% in exchange for Japanese commitments to invest in the US; whether those commitments are meaningful remains to be seen, since some of those investments would have happened anyway, and in any case the Japanese government does not control the investment decisions of its companies.

#### *4.1.5. EU-Japan bilateral digital relations and frameworks*

Japan enjoys several privileged bilateral relationships with the EU. The most important current or emerging ties today are arguably (i) the EU-Japan Economic Partnership Agreement (EPA) (a wide-ranging FTA), (ii) the adequacy decision under the EU’s GDPR, and (iii) Japan’s anticipated designation as an associated country under the Horizon Europe programme. These need to be understood, however, as merely the latest building blocks in a relationship that has been growing over many years. The relationship continues to evolve – current mutual interests include AI, 5G and 6G mobile services, semiconductors, high performance computing, quantum technology, data governance and online platforms, submarine cables and Arctic connectivity, digital identities, trust services, and cybersecurity.

The EU-Japan EPA entered into force on 1 February 2019. It provides the EU and Japan with preferred trade arrangements for a wide range of goods and services. More than 97% of goods will no longer be subject to duties in either direction (after transition periods). The EU benefits in exporting wine, cheese, and meat; Japan benefits in exporting automobiles and automotive parts, machinery, electronics, and chemical products.

The EPA is a ‘new style’ FTA – it improves market access and reduces regulatory barriers not only for goods, but also for services. It reduces frictions in both directions for transport and logistics services, financial services, telecommunications, professional services, and more. There are very few services that are excluded, and most of these are services that are excluded from all EU FTAs. The EPA is believed to have generated modest benefits for both Japan and the EU, but many companies continue to trade under World Trade Organization (WTO) rules rather than taking advantage of the presumably better arrangements under the EPA.

With its adequacy decision under the EU’s GDPR, Japan joined an elite club of just 16 countries. The US and the UK hold adequacy decisions, as well as Argentina, Canada, Israel, Korea, New Zealand, Switzerland, Uruguay, and most recently Brazil. But many of the 16 are small countries (mostly islands) with historic ties to EU Member States:

Andorra, the Faroe Islands, Guernsey, the Isle of Man, and Jersey. The European Patent Organisation also holds an adequacy decision.

The adequacy decision, put in place as part of the same process that led to the EU-Japan EPA, enables firms to transfer personal data from the EU to Japan under substantially the same rules that hold for transfers within the EU. In principle, this ought to provide Japanese online service providers with a substantial competitive advantage over service providers from countries that do not hold an adequacy decision, and should likewise benefit EU-based service providers in offering services to customers in Japan.

The adequacy decision is felt to be functioning well, and to contribute to legal certainty. It reduces transaction costs for Japanese firms that do international business, strengthens Japan's role as a data hub within Asia, and facilitates EU-Japan business cooperation. To date, however, there are few indications that Japanese firms have benefitted in a big way from the relationship – it has not been a game changer. This likely reflects the reality that US-based and to some extent China-based providers hold a dominant position and are hard to dislodge.

Negotiations for Japan's association agreement with the EU's Horizon Europe programme were concluded on 22 December 2025. The agreement is expected to be signed and to come into force in 2026. It has already been possible for Japanese researchers to respond to Horizon Europe calls since January 2026.

The association agreement enables Japanese researchers to lead or coordinate research projects under Horizon Europe, and to benefit from funding for their contributions. The focus of this agreement is on societal challenges, the digital transition, food security, and climate-neutral energy.

Many other flanking measures bolster EU-Japan research collaboration, two of which are especially notable.

- The EU-Japan Digital Partnership (2022). This partnership, launched in 2022, under ministerial leadership aims at providing concrete deliverables in line with Japanese and EU priorities for a digital economy and society. [Priorities from 2026](#) include promoting an international Data Free Flow with Trust framework, digital identity and electronic signatures, protection of personal data, responsible AI, quantum technology, submarine cables, 5G and 6G mobile technologies, digital standards, cybersecurity, and platform regulation (including protection of minors).
- The EU-Japan Enhanced Dialogue on Advanced Materials (2024). The centrepiece of this EU-Japan effort on R&I in material sciences is an [expert group](#) that seeks

to identify joint critical needs, complementarities, and opportunities for collaboration on advanced materials for construction, energy, mobility, electronics, and data-driven R&D (including autonomous experimental systems).

#### *4.1.6. Multilateral level, including regulatory cooperation*

Japan is a key player in two major multilateral FTAs: the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) and the Regional Comprehensive Economic Partnership (RCEP).

The CPTPP is an outgrowth of the negotiations for a Trans-Pacific Partnership (TPP). The TPP potentially would have strengthened the US role in the region, and diminished that of China; however, the US withdrew shortly after Trump was re-elected, thus making ratification impossible. Japan reportedly took the lead in transforming the TPP into a new treaty preserving most of its aspects, and including all of the TPP signatories except for the US. The UK subsequently joined the CPTPP. China has applied to join but has no realistic prospect of being accepted for membership in the near future.

The RCEP is an FTA that includes not only all ASEAN countries, but also China, Korea, and Japan. The RCEP has a different geopolitical flavour to the CPTPP to the extent that China participates. The US does not participate in either treaty.

Japan stands to gain substantially from both. Macroeconomic analysis using a computable general equilibrium (CGE) model in 2020 suggested that the two agreements

will raise global national incomes in 2030 by an annual \$147 billion and \$186 billion, respectively. They will yield especially large benefits for China, Japan, and South Korea and losses for the United States and India. ... Compared with business as before, the trade war generates large global losses rising to \$301 billion annually by 2030. The new agreements offset the effects of the trade war globally, but not for the United States and China. The trade war makes RCEP especially valuable because it strengthens East Asian interdependence, raising trade among members by \$428 billion and reducing trade among non-members by \$48 billion.

This [analysis](#) is suggestive but not necessarily definitive today – it was undertaken before the Covid-19 shock, and while a US-China trade war was explicitly considered, it likely was not as intense as one that has in fact eventuated.

Japan is also a long-standing and important member of many key international organisations, including the Asia-Pacific Economic Cooperation, the OECD, the G7, the G20, and of course the UN.

Furthermore, Japan is one of the world's largest and most active contributors to multilateral development finance. It is a major contributor to the World Bank and the

Asian Development Bank. Japan does not participate in the Asian Infrastructure Investment Bank.

Japan is an active participant in numerous international standards bodies, including the International Organization for Standardization (ISO) and the International Telecommunications Union (ITU). Japanese firms are prominent in many of the standards organisations that are driven by firms rather than governments. Cooperation between the Japanese Industrial Standards Committee (JISC) and CENELEC was strengthened by a new agreement that makes JISC a Companion Standardization Body of CENELEC.

#### *4.1.7. Prospects for the Taiwan-Japan partnership going forward*

Japan and Taiwan currently do not maintain formal diplomatic relations. Following the 1972 Joint Communiqué between Japan and the People's Republic of China, the Japanese government recognised the Government of the People's Republic of China as the sole legal government of China. As a consequence, Japan severed diplomatic relations with the Republic of China (Taiwan). Substantive relations have nonetheless continued to be maintained in practice.

Even though Takaichi is in principle highly supportive of Taiwan, cooperation between Taiwan and Japan is necessarily limited by the same factors that constrain Taiwan's relationships with other countries. Any cooperative arrangement that implies support for a 'two China policy' or that appears to recognise Taiwan as a country is likely to trigger a strong and forceful negative reaction from the PRC. Given the close interdependency between Japan and China, Japan will want to avoid unnecessary PRC economic retaliation. The [PRC's reaction to Takaichi's 'existential threat' remarks](#) is thought to have led to a significant decline in Chinese tourism to Japan – an outcome that Japan is not likely to wish to needlessly repeat.

With that said, a great deal of quiet cooperation is already going on, but in ways that do not cross the PRC's red lines. The real opportunity is to build on this quiet but important joint effort.

Perhaps the greatest area of collaboration today is on semiconductor supply chain resilience, and there may be scope to expand it. Taiwan manufacturer TSMC has announced plans to [produce ultra-high-tech 3 nm chips](#) in Kumamoto, Japan, representing an investment of some USD 17 billion. Japan is expected to subsidise this deployment. TSMC is already present in Kyushu.

Measures to identify, anticipate or mitigate disruptions to supply chains in general, and to the semiconductor manufacturing supply chain in particular, is another obvious channel for collaboration.

There are clearly opportunities for joint R&D in support of semiconductor manufacturing as regards materials, lithography, packaging, and advanced substrates. More generally, the opportunities for non-military joint R&D are similar to those between Japan and the EU, and appear to include trustworthy AI, quantum safe cryptography, robotics and industrial automation, battery technologies, and cybersecurity.

Disaster-response and humanitarian cooperation is already well established, with likely prospects to increase it. Japan and Taiwan are both vulnerable to many of the same threats, notably including earthquakes and tsunamis. Anticipation of disasters by means of R&D and modelling is promising, as is coordinating on disaster relief if a risk materialises. [Maritime safety and search and rescue cooperation](#) is likewise already in place and unproblematic.

There are probably also opportunities to extend joint work in the public health and biotech sectors, including medical device standards and pharmaceuticals. These could perhaps be coordinated with EU initiatives.

All of these seem to offer scope to broaden Taiwan-Japan collaboration while flying under the radar of PRC sensitivities.

## 4.2. KOREA PARTNERSHIP

### 4.2.1. *South Korea's digital trends and technological priorities*

South Korea is a leading digital economy with advanced ICT infrastructure and high digital literacy levels among its population. To retain competitive leadership, the country has continuously invested in R&D in innovative technologies. Six are prioritised in the September 2022 [Korean Digital Strategy](#): AI, AI semiconductors, 5G/6G, quantum, metaverse and cybersecurity. The five-pillar strategy aims to build the 'world's best digital capabilities', nurture the digital economy and a digitally inclusive society, as well as promote a digital innovation culture both domestically and globally. Digital government is another pillar – a long-term endeavour boosted by a dedicated 2021-25 [Masterplan](#).

Korea is currently in the midst of an 'AI craze' with an emphasis on sovereignty and AI as an engine for growth. Since 2025, President Lee Jae-myung's government – through the new [National AI Strategy Committee](#) – has sought to make the country [one of the top three global AI powers](#) on a par with the US and China. It has promised 'AI for All', by developing a publicly-funded homegrown AI model (or 'K-AI'). The government's initiative, backed by most Korean tech giants – which are progressively [losing out](#) to American companies – emphasises national autonomy and security. This balancing act over sovereignty is highlighted by the large, fast-moving role of US players in the Korean

AI industry, from NVIDIA's indispensable [GPU supply](#) to OpenAI's [popularity](#) and entrenched cloud providers such as AWS and Google Cloud.

As in the EU, there is plenty of debate on the cost, necessity and feasibility of AI sovereignty, not to mention fears of state-driven manipulation. There are strong domestic [foundations](#), including in terms of datasets and capabilities. Key challenges to K-AI include dependence on foreign hardware and software infrastructure (access to AI chips/GPUs, cloud and software ecosystem) and growth potential beyond Korea.

#### *4.2.2. Digital governance and key stakeholders in South Korea*

Since the 1980s, digitalisation and technological innovation have been major components of South Korea's rapid state-led, export-focused development and industrialisation. Within the government, the main actors are the Presidential Office, the [Ministry of Science and ICT](#) and the [Ministry of Trade, Industry and Resources](#). The [Ministry of the Interior and Safety](#) oversees the country's significant digital-government efforts. Other ministries and commissions preside over privacy and platform regulations, as well as start-up and business innovation.

The Korean state steers these high-value, knowledge-intensive sectors through economic planning, in close collaboration with homegrown conglomerates, which account for a large [majority](#) of domestic R&D spending. From semiconductors to AI clusters and digital platforms, they include, among others, Samsung Electronics, SK Group, Naver, Kakao and LG Group. Public-private cooperation is the norm in the widespread deployment of cutting-edge ICT infrastructure and in STEM education programmes. Both government and corporate actors have active research institutes and support the venture-capital ecosystem.

While national policies have consistently championed tech development and the digitalisation of society and services, political alternance in single-term presidencies has had an impact on governance. Whereas the current administration, led by the liberal Lee of the Democratic Party, focuses on digital rights and sovereignty, state-coordinated digital [regulation](#) and investment, his conservative predecessor pursued deregulation and market-driven development. Under Lee's pro-regulation presidency, the government is legislating actively on digital platform fairness, privacy, AI, digital crime, cybersecurity and cloud.

These top-down directions are then influenced by several factors, from powerful domestic business lobbies to geopolitical pressures on supply chains and digital diplomacy. Democratic Party leaders like the current president also have a track record of strong cooperation with Korean civil society, which is active in digital standards and digital rights advocacy but has limited influence.

### 4.2.3. South Korea's relations with the US, China and other tech powers

#### United States

US-South Korea relations are built on a foundational military alliance and have evolved into a comprehensive strategic partnership. When it comes to digital and technology diplomacy, the Trump tariff crisis and political shifts in both countries over the past year have redefined South Korea's trade, investment, sovereignty and regulatory prospects.

Trump's second term began at a time when South Korea was leaderless, following the attempted imposition of martial law by the former pro-US President Yoon Suk-yeol and his subsequent removal from office. Despite this political vacuum, Trump's March 2025 announcement of a 25% tariff on South Korean products triggered, in response, a meeting of Korean, Chinese and Japanese officials for a milestone economic dialogue – the first in five years. The newly-elected Lee worked to secure a tentative tariff deal in July. His appeasement strategy towards the US was challenged when, in September 2025, a large immigration raid targeted over 300 Korean workers at a Hyundai Motor Group production site in the US state of Georgia. This high-profile diplomatic incident stalled bilateral trade and investment negotiations.

Between the 'America First' US administration and South Korea's pragmatic leader, a [Memorandum of Understanding](#) on strategic investments and a [joint fact sheet](#) were released in November 2025. The political deal, whose legal impact in Korea is debated, has implications for the semiconductor industry, AI/quantum computing and digital regulation. While it was [noted](#) that, compared with a similar deal between the US and Japan, the one with Korea contained more safeguards for investors, analysts believe the deal [fell short](#) on some issues. Semiconductor tariffs remain uncertain and depend on ongoing [US-Taiwan negotiations](#).

In addition, the joint fact sheet targets Korean regulations by including a commitment to avoid 'unnecessary barriers in terms of laws and policies concerning digital services, including network usage fees and online platform regulations, and to facilitate cross-border transfer of data, including for location, reinsurance, and personal data'. This has prompted domestic political debate on Korea's digital sovereignty and the passage of the Online Platform Regulation Act, which would translate into network usage fees for American tech companies in Korea.

#### China

China-South Korea relations are as tumultuous as they are strong. China has been South Korea's leading trade partner for more than 20 years, while South Korea is among China's biggest bilateral trade partners, with top exports including semiconductors and

machinery. Despite this interdependence, bilateral dialogue fluctuates along various fault lines on security, political, and economic interests, including American military expansion on South Korean soil and sea. Nevertheless, even the most pro-US Korean administrations, such as the conservative Yoon's (2022-25), have sought to avoid alienating its large neighbour.

Today, the Lee administration seeks an uneasy geoeconomic balance between its biggest partners and in competition with them. China objects, in particular, to Korea's trilateral technology cooperation with the US and Japan (the Camp David framework) and other trade and tech alliances from which it is excluded, such as Chip 4 (which includes Taiwan) and the broader Indo-Pacific Economic Framework for Prosperity. Meanwhile, industrial competition is growing between South Korean and Chinese companies across a long list of tech sectors, from semiconductors to green tech, electronics, telecom, AI, and cloud services. In early 2025, the arrival of China's low-cost DeepSeek model on the global market and consequent sell-off strongly [affected](#) the South Korean AI industry.

### Global tech investments in Korea

Led by American firms (Microsoft, Google, NVIDIA and AWS), foreign investors in Korea's AI, cloud and data infrastructure markets also include major European players ([ASML](#), Infineon Technologies and Siemens). In addition are investments by Japanese firms (Tokyo Electron and Renesas Electronics) and the Taiwanese TSMC. South Korea-Singapore digital ties are also set to grow, as the two countries [upgraded](#) to a strategic partnership in November 2025.

#### 4.2.4. EU-Korea bilateral digital relations and frameworks

EU-Korea digital, technology, and industrial collaboration is framed in major bilateral agreements. The 2011 EU-Korea FTA (fully ratified in 2015) contributed to large increases in bilateral trade and provided strong economic foundations for ICT services, e-commerce, telecoms, IP and services trade. It was complemented by a dedicated EU-Korea [Digital Trade Agreement](#) concluded in March 2025, adopted based on shared [Digital Trade Principles](#). The European Commission's December 2021 decision to grant [GDPR adequacy](#) status to Korea's Personal Information Protection Act (PIPA) paved the way for increased and facilitated data flows between the EU and Korea.

Besides these legally-binding trade agreements and regulatory decisions, bilateral strategic alignment on digital cooperation was formalised through the EU-Korea [Digital Partnership](#) launched in November 2022. It is part of the broader EU-Korea [strategic partnership](#), based on the shared values and interests that make South Korea one of the EU's like-minded partners. The bilateral Digital Partnership Council met for the [third](#) time in November 2025, emphasising joint R&I on semiconductors, 6G, AI and quantum

technologies. Beyond technologies, the partners prioritise cooperation on AI regulation, data spaces, cybersecurity and overall digital standardisation. Korean companies – among others – keep a [close and proactive watch](#) on the EU’s digital regulation.

On the R&I side, the 2007 [Scientific and Technological Cooperation agreement](#) between the EU and Korea predates the partners’ key framework agreements. Currently, Korea’s [association](#) to pillar II of Horizon Europe from 2025, which includes a digital, industry and space [cluster](#), lends unprecedented momentum for strategic collaboration. A specific [call](#) for collaborative EU-Korea research projects on quantum technologies was released in October 2025. Despite the opportunities offered by Horizon Europe association and political prioritisation via the digital partnership, progress in joint R&D and innovation remains tied to scientific and business networking and matchmaking. This can be described as nurturing the ‘demand-side’ of R&I cooperation.

#### *4.2.5. EU Member States and South Korea*

While the EU sets the rules for the economic activities of Member States in Korea, the Member States often pursue their own strategic agenda in Korea – including in the digital sector. This agenda is shaped by national priorities that are shared with Korea, as well as the competitive profile of their own private sector in prioritised domains. In parallel, Korean public [perception](#) of the EU is still primarily shaped by interactions with specific Member States.

Although bilateral digital, industrial and sector-specific ties between a number of Member States and South Korea predate the 2022 EU-Korea Digital Partnership, its launch had various impacts on cooperation. The digital partnership is a source of political legitimacy for Member States to spotlight South Korea (rather than non-digital partnership countries) in relevant dialogues, along the lines of individual Member State priorities and interests. For example, engagement and networking opportunities for Danish-Korean cooperation on quantum technology was strengthened by the digital partnership. Moreover, Denmark’s presidency of the Council of the European Union (July-December 2025) temporarily enhanced the country’s digital and technological profile on the international stage, as well as its agenda-setting power.

Yet even with these synergies, the coordination of digital diplomacy outreach activities between the EU and Member States in Korea is not always consistent. This pattern is observed in other countries with which the EU has a digital partnership, and may have negative impacts on its diplomatic objectives.

Compared with the EU’s strategic and political frameworks for cooperation, such as the 2025 [International Digital Strategy](#) and the digital partnerships, the impact of Horizon Europe association with Korea on EU Member States is more direct in nature. Horizon

Europe association allows the research sector in Member States to work much more closely with Korean researchers on priority technologies (including those not yet commercialised), to secure research funds for joint projects which are sometimes scarce in national budgets, as well as to provide partners with additional support platforms. Collaboration with Japan, with whom the EU is currently negotiating Horizon Europe association, is likely to reap similar benefits.

Several EU Member States have a long track record of digital, technology and industrial cooperation with Korea. Germany and Korea have long-running economic and science and technology (S&T) cooperation frameworks. A [Germany-Korea Digital Dialogue](#) has, since 2022, prioritised smart manufacturing and the start-up ecosystem besides frontier technologies and the cloud.

France, which has similarly strong diplomatic and economic relations with Korea, concentrates joint efforts on ICT and AI, both via the government-supported [La French Tech Seoul](#) start-up network and bilateral [ANR-NRF](#) research programmes. The Netherlands is deeply embedded into Korea's semiconductor supply chains through ASML, which has opened a [new HQ campus](#) in Korea. Finland's [Nokia](#) and Sweden's [Ericsson](#) continue to work with Korean operators and research partners on 5G/6G development and deployment.

Other means for Member State-Korea digital cooperation include Member State chambers of commerce and business agencies, innovation or specialised digitalisation agencies with local offices (e.g. Innovation Centre, Denmark and Korea), as well as frequent global delegations (e.g. e-Estonia and the e-Governance Academy).

#### ***4.2.6. Multilateral level, including regulatory cooperation***

South Korea's evolution into a leading digital economy and technological innovator has prompted the country to define its global aspirations. Having worked to develop homegrown standards, South Korea has quickly taken interest in shaping global regulations. South Korea and Korean organisations, both public and private, are active members of international standardisation bodies including the ITU, the ISO and the International Electrotechnical Commission (IEC). In participating, Korea is ensuring its competitive edge – not only by making sure that its domestic industries remain early and informed adopters of new regulations, but also by ensuring that Korean companies are not isolated in using homegrown standards. This [sets them apart](#) from players like Japan, which currently focuses on standard assimilation.

In addition, Korea does not subscribe to a Chinese, US, EU or 'Western' digital model, and therefore should be studied as a distinct player in digital standardisation – as is true of

India. This is particularly noticeable in Korea's path towards homegrown AI, with keywords including sovereignty and open-source.

As like-minded partners, the EU and South Korea are committed to working together on a human-centric digital transformation, at both the bilateral and multilateral levels. While South Korea is no 'follower' of the Brussels effect per se, it pursues value-driven objectives similar to those of the EU (such as AI 'for good') and it is keen on unlocking opportunities offered by the EU market through regulatory harmonisation, as was the case for privacy laws (PIPA-GDPR adequacy). It is also eager to collaborate with the EU on international standard-setting, working to fill the vacuum in global governance of frontier technologies.

South Korea's international partnership and multilateral engagement pattern also follows various narratives shaped by its economic and political development. To like-minded democratic partners and key strategic allies, Korea aims to be a 'global pivotal state'. To other international partners, in particular developing economies, Korea uses its built identity as a country whose economic development was an accelerated 'miracle' over a few decades.

One organisation through which Korea can promote these partnership narratives is the OECD, where it consistently tops the ranks in ICT R&D investment, science and technology. Korea takes part in governance and public sector innovation workstreams as well as in the OECD's Committee on Digital Economic Policy, sharing best practice on digital transformation and innovative technologies. It is also a member of the OECD's Development Assistance Committee, whose key topics include global connectivity and infrastructure cooperation.

### 4.3. SINGAPORE PARTNERSHIP

Singapore has emerged as a dynamic hub for digital technologies. In 2023, it [ranked](#) fifth in the [Global Innovation Index](#). By 2024, it ranked third globally in the [UN e-Government Survey](#) and fifth in the world. It also led Asia in the [IMD Smart Cities Index](#), showing the success of its digital governance efforts. In the 2025 [Global AI Readiness Index](#), Singapore ranked second globally in overall AI readiness.

Traditionally an attractive place for doing business, in 2025 Singapore was second in the [IMD World Competitiveness Ranking](#). The start-up ecosystem in Singapore is continually growing (Singapore was in ninth place in [The Global Startup Ecosystem Report, 2025](#)), with [SGInnovate](#) playing a pivotal role in nurturing deep-tech start-ups.

The [Singapore Digital Economy Report 2025](#) highlights the continued growth of its digital economy (18.6% of GDP in 2024) and deepening digitalisation across enterprises. Digital

adoption by SMEs rose to 95.1%, with 97% adopting sector-specific digital solutions. AI adoption has expanded rapidly, with the proportion of SMEs using it increasing from 4.2% to 14.5% and the share of non-SMEs using it rising from 44% to 62.5%. It is being applied across a range of business functions. Tech manpower represents 5.3% of employment.

Singapore has adopted a [whole-of-government model](#) for digital governance. The [Ministry of Digital Development and Information](#) (formerly the Ministry of Communications and Information until it was renamed in 2024) drives Singapore's digital development. The Smart Nation & Digital Government Group – operating under the Prime Minister's Office – [merged](#) with the digital development functions of the ministry to form an enlarged Smart Nation group in October 2023. [Digital Industry Singapore](#) has acted as the sole interface of the Singaporean government for the digital industry since 2019. Established the same year, the [Home Team Science and Technology Agency](#) is the national science and technology body. [GovTech](#) is the main statutory agency responsible for digital government transformation and the Smart Nation initiative.

In 2024, Singapore launched [Smart Nation 2.0](#), which frames the country's digital agenda and aims to establish a highly reliable and secure digital infrastructure, benefitting both individuals and businesses. Singapore continually updates its digital governance regime to keep pace with technological change. Key updates include major amendments to [the Personal Data Protection Act](#) (2021-22), which enhanced enforcement powers, and an amendment to the [Cybersecurity Act](#) in 2024.

The government has announced that the new [Digital Infrastructure Act](#), now expected to be tabled in Parliament during 2026 after being initially slated for 2025, will make digital systems like data centres and [cloud services](#) more reliable and secure, complementing the Cybersecurity Act. Alongside this, Singapore is advancing AI governance through a [National AI Strategy 2.0](#), updated [Model AI Governance Frameworks](#) (including for generative AI), and assurance tools such as [AI Verify](#). This combined approach reflects a risk-based model aimed at enabling innovation while maintaining strong data protection, cybersecurity, and public trust.

#### ***4.3.1. Bilateral and multilateral digital partnerships***

Singapore and several EU Member States are members of the [Digital Public Goods Alliance](#), a multi-stakeholder UN-endorsed initiative supporting the discovery and deployment of open-source technologies. Through the launch of the [Singapore Digital Gateway](#) in 2025, Singapore is making many of its digital tools and 'digital public goods' available to partner countries and multilateral actors. Singapore also contributes to global digital cooperation, e.g. a [pledge](#) of SGD 10 million in 2023 to the ITU's Partner2Connect

Digital Coalition, supporting digital inclusion worldwide. It further participates in selected OECD bodies such as the [Global Partnership on Artificial Intelligence](#).

Singapore has taken a leadership role among small states in AI governance through initiatives such as the [AI Playbook for Small States](#), developed [in collaboration with Rwanda](#), to share best practices on safe and responsible AI deployment. It also actively participates in international AI-safety efforts. For example, at the April 2025 [Singapore Conference on AI](#), over 100 of the best global minds from academia, industry and government came together to identify a consensus around technical AI-safety research priorities. While Singapore maintains [relationships with China and India](#), anchored by strong economic linkages and frequent high-level exchanges, it increasingly seeks to maintain strategic diversity.

A [Digital Economy Partnership Agreement](#) (DEPA), established by Singapore, Chile and New Zealand in 2021, promotes digital trade, trusted data flows, and inclusive digital economies among members. Korea joined DEPA in 2024 and by October 2025, nine more countries had applied to join it (China, Canada, Costa Rica, Peru, the United Arab Emirates, El Salvador, Ukraine, Thailand and Uruguay). Singapore additionally has Digital Economy Agreements with [Korea](#) (since 2021), [Australia](#) (since 2020) and the [UK](#) (since 2022). In July 2024, Singapore, Australia and Japan, as the co-convenors of the [WTO Joint Statement Initiative on Electronic Commerce](#), announced agreement on a stabilised text after five years of negotiations. It covers digital trade facilitation, an open digital environment, and business and consumer trust.

Singapore and China collaborate on their digital economies [through Singapore-China Digital Policy Dialogues](#), as well as several Memoranda of Understanding (MoUs) such as the recent one on [Singapore-China Green and Digital Shipping Corridor](#).

Meanwhile, the [US-Singapore Critical and Emerging Technology Dialogue](#) initiated in 2023 focuses on areas such as defence innovation, quantum information science, and climate technology. In 2024, Singapore and the US released a joint [Roadmap for Digital Economic Cooperation](#) reflecting shared principles and priorities for digital economy cooperation.

Singapore is a stable, low-corruption country with solid accountability mechanisms, though with a [tightly managed flow of political information](#). It is a major hub for international congresses and technology events (the [Asia Tech Summit](#) and [Singapore Week of Innovation](#)). It offers companies a highly supportive innovation ecosystem with robust legal infrastructure, venture capital, business partners and world-class logistics.

### 4.3.2. Focus on EU-Singapore digital relations

Globally, Singapore is among the EU's important economic partners, with the EU and Singapore having developed relations built on [strong trade links and shared economic interests](#). In terms of [trade and investment relations](#), in 2024 Singapore was the EU's 21<sup>st</sup> largest trading partner worldwide for trade in goods and its second largest trading partner in ASEAN (after Vietnam). At the same time, the EU was Singapore's fifth largest trading partner. Singapore furthermore serves as a gateway to the wider ASEAN region, which also represents a major economic and digital partner for the EU.

The 2019 [EU-Singapore FTA](#) established a framework for economic exchange, and both sides have since expanded collaboration into strategic domains such as sustainability, connectivity, and digital transformation. This broad bilateral relationship provides the foundation for the more recent digital cooperation agenda.

Following the signature of digital partnerships with Japan and South Korea, and [announcement of a new one](#) by European Commission President Ursula von der Leyen and Prime Minister Lee Hsien Loong at the EU-ASEAN Summit in December 2022, the EU-Singapore Digital Partnership was launched in February 2023. It establishes a broad [framework for cooperation on digital issues](#). The agreement promotes collaboration on cross-border data flows, digital trade facilitation, cybersecurity, AI governance, 5G/6G, semiconductor value chains, digital identities, and digital skills development. As its [key deliverable](#), a set of Digital Trade Principles was adopted as the basis for deeper digital trade cooperation.

During the recent second meeting of the [Digital Partnership Council](#) (December 2025), both sides 'reaffirmed their intention to enhance mutual competitiveness, foster innovation and shape digital rules and standards'. They discussed the current and future cooperation in such areas as AI, online safety, trust services, cybersecurity and data flows, and possible joint efforts on data spaces, semiconductors and quantum (including prospects for collaborative research under Horizon Europe).

As underlined during interviews, Singapore approached the digital partnership with a strong focus on practical, business-relevant outcomes, viewing it as a first step towards a more binding agreement on digital trade. The previous EU-Singapore FTA did not sufficiently cover digital aspects, and Singapore – home to over 12 000 [European businesses](#) – sought clearer rules, especially for SMEs that depend on trusted cross-border data transfers.

The EU-Singapore [Digital Trade Agreement](#) (EUSDTA), signed in May 2025, reflects a shared commitment to leading global digital developments while supporting open, fair, and competitive digital economies. It is designed to reduce barriers to digital services,

support innovation, and align regulatory approaches. While the EU-Singapore Digital Partnership sets out cooperation priorities, the EUSDTA moves towards mandatory rules for digital trade. Being the first EU agreement of its kind, once [ratified](#) by both sides it will be a [landmark in shaping global digital-trade standards](#).

The EUSDTA also explicitly refers to the digital partnership and provides a rules-based framework underpinning broader cooperation. Singapore sees itself as an [‘innovative regulator’](#) that learns from global developments while adapting governance tools to local needs. It sees the EU as a significant market and partner, evidenced by [EUSDTA support](#) for ‘cross-border interoperability of e-invoicing frameworks’ and ‘paperless trading’, along with collaboration on cybersecurity and digital-economy governance.

The agreement [provides](#) businesses, especially SMEs, with legal certainty and smoother cross-border digital transactions while also enabling cooperation on cutting-edge technologies such as AI, semiconductors and 5G/6G. At the same time, it supports the EU’s regulatory and value-based agenda by promoting EU data-protection and digital-trust standards with a partner that, although not having an EU-style privacy framework, is committed to trusted data flows, as evidenced by the recent [joint statement](#).

Within Asia, Singapore stands out as a technologically advanced, highly open and innovation-driven economy, and serves as a central digital hub for ASEAN, the EU’s [third largest trading partner](#) outside Europe, after the US and China. With Singapore being a founding member of ASEAN, the EU-Singapore partnership is central to enhancing [region-to-region digital cooperation](#). Its strategic location, world-class digital infrastructure, regulatory openness and strong global connectivity make it an ideal gateway for European companies entering Southeast Asia.

The EU has a [high degree of technological complementarity](#) with Singapore, especially in areas like AI, cloud/edge computing, cybersecurity, and other advanced digital technologies. [Recent CEPS analysis](#) of the technological complementarities of the EU and global partners also highlights Singapore’s distinctive position within the international innovation ecosystem. While the country does not compete directly with larger technological powers in manufacturing scale or frontier research output, it performs a critical intermediary role in venture capital financing, start-up internationalisation, regulatory experimentation, and trusted digital governance. These characteristics make Singapore a particularly valuable partner for the EU’s broader diversification and Indo-Pacific engagement strategy.

Singapore excels in AI readiness, cybersecurity maturity, fintech, cloud and edge computing. It has developed its own AI testing and verification tools, such as [AI Verify](#) and [Project Moonshot](#), reflecting its focus on development and practical implementation

rather than heavy regulation. Singapore is also interested in [benchmarking the EU AI Act](#) against its own tools to explore complementarity and global interoperability. A significant deliverable of the digital partnership was the [Administrative Arrangement to reinforce cooperation on AI safety](#), signed in November 2024, reinforcing cooperation towards safe, trustworthy and human-centric AI. In addition, in 2024 the EU and Singapore launched exploratory discussions in view of Singapore's possible association to [Horizon Europe](#).

Singapore remains a preferred base for European companies, with [25 out of 27 EU Member States](#) maintaining their embassies or consulates there. Singapore also conducts extensive bilateral cooperation with individual EU Member States. In March 2022, Singapore and France signed up to a [Digital & Green Partnership](#), supporting collaboration in digital trade, emerging deep tech (including AI), and partnerships between French and Singaporean companies.

In 2024, Singapore and Germany embarked on a [Strategic Partnership](#) that explicitly includes 'digitalisation, AI, and cybersecurity' among its five areas for cooperation (along with trade, defence, the green economy, and innovation). In addition, Singapore has enhanced cooperation on quantum technology with [France](#), [Germany](#), [Spain](#) and others (notably, quantum is not covered by the EU-Singapore Digital Partnership).

Overall, Singapore stands out as a strategically important partner for the EU: a technologically advanced, highly open and innovation-driven economy that acts as a natural gateway to ASEAN. Its commitment to trusted data flows, AI governance, cybersecurity and interoperability aligns closely with the EU's values-based digital agenda, while its network of Digital Economy Agreements makes it an influential rule-shaper in the Indo-Pacific. For European companies, Singapore offers legal certainty, world-class infrastructure and regional connectivity.

The EU [International Digital Strategy](#) prioritises deepening the cyber dialogues and cooperation on AI safety with Singapore and other Asian partners, as well as the development of open-source building blocks for EU Digital Wallets with Japan, India, and Singapore. The combination of the EU-Singapore Digital Partnership and the Digital Trade Agreement provides an ideal platform for a Team Europe approach to deploy the EU's Tech Business Offer, as well as a network of digital and R&I partnerships on specific tech areas.

## 4.4. INDIA DIALOGUE

### 4.4.1. *India's digital trends and technological priorities*

India is the third largest digital economy in the world, behind the US and China, with a large scale of digital users, volume of digital transactions, adoption intensity of digital public infrastructure, and breadth of digitally enabled sectors. India is also the only other country with which the EU has a Trade and Technology Council, and it has recently signed a free trade agreement with the EU.

The Digital India Programme, launched in 2015, is foundational to India's digital transformation. It provides an umbrella framework with nine pillars, focusing on AI, connectivity, ICT services, (electronic) manufacturing, upskilling and e-governance. In following the development path it has set out, the country is investing in digital public infrastructure that reduces transaction costs across the economy, pulling companies and the public into formal digital channels.

Adoption rates seem to be responding well to the investments<sup>3</sup>, with the value of transactions, telecom and infrastructure subscriptions, internet and broadband penetration all experiencing significant increases. The uptake has been supported by flagship projects, such as PMDISHA, FutureSkills Prime, and Common Service Centers, which are directed towards connectivity in rural areas and thus contribute to India's overall digital economy and development.

Having developed and adopted its digital infrastructure and platforms over the past decade, nurtured by upskilling, India is now seeking to shape its future by building upon innovation while ensuring governance, interoperability and access. In line with 'Viksit Bharat' (i.e. Developed India by 2047), this involves sustaining investments in cutting-edge technologies like AI, quantum computing and space.

### 4.4.2. *Digital governance and key stakeholders in India*

The principal authority for digital governance is the Ministry of Electronics and Information Technology (MeitY). It oversees the IT Act, the Digital Personal Data Protection Rules (2025), the Digital India Programme, and policy on AI, semiconductors, the cloud, and cybersecurity. It also presides over digital public infrastructure platforms, including Aadhaar and DigiLocker.

The Ministry of Communications, operating through the Department of Telecommunications, governs telecoms, internet services, tariffs, spectrum, and net neutrality enforcement under the Telecommunications Act of 2023. The Telecom Regulatory Authority of India (TRAI) acts as the independent sector regulator, with

responsibility for telecom policy and spectrum. It also administers the Digital Personal Data Protection Act (2023) in its regulatory domain.

Finally, the Reserve Bank of India governs fintech, digital payments, and data localisation in the financial sector, including oversight of the Unified Payments Interface (UPI) and payment intermediaries. This distributed institutional landscape – with relevant competences spread across MeitY, the Ministry of Communications, TRAI, and Reserve Bank of India – means that coherent engagement from the EU requires coordination across multiple Indian counterpart institutions simultaneously.

#### *4.4.3. India's relations with the US, China and other tech powers*

##### **United States**

The principal framework governing US-India technology cooperation is the TRUST initiative (Transforming the Relationship Utilizing Strategic Technology). It was announced during Prime Minister Narendra Modi's visit to Washington in February 2025 as an upgrade and expansion of the earlier iCET (Initiative on Critical and Emerging Technology), which had been in operation since 2022. Under iCET, the two governments significantly expanded semiconductor cooperation: Micron Technology committed to investing up to USD 825 million to establish a semiconductor assembly and test facility in India, supported by India's Semiconductor Mission and the government of Gujarat. Lam Research and Applied Materials also announced expansions of their supply chain presence in India. TRUST broadens this into critical minerals, biotechnology, energy, and space, and adds an AI Infrastructure Roadmap designed to accelerate the deployment of large-scale, US-origin AI infrastructure in India.

The US-India relationship is the most consequential external partnership on technology that India holds, and it generates a structural complication for EU-India digital relations. The depth of US-India semiconductor and AI cooperation – and its integration with defence and national security channels – means that India approaches technology partnerships with the EU from a position that is already anchored in a different security architecture.

The EU's TTC with India has no equivalent defence or intelligence dimension, and the EU cannot match the US in terms of the commercial scale of the semiconductor investment on offer. Where the EU is more competitive – regulatory standard-setting, data governance and the interoperability of digital public infrastructure – are precisely the areas where India's own regulatory ambitions and its desire for strategic autonomy create friction with Brussels.

## China

India's digital relationship with China has been defined since 2020 by managed rivalry rather than engagement or full decoupling. Following the deadly clash at the Galwan Valley border in June 2020, India banned TikTok and dozens of other Chinese mobile applications, citing data security grounds, without formally referencing China in the government notifications. Since 2020, India has banned more than 220 Chinese apps in total.

Chinese applications for foreign direct investment (FDI) have also faced systematic scrutiny: in 2023, only three approvals were granted; in 2024, of 526 applications received, 124 were approved, 201 rejected, and 200 remain pending. At the same time, bilateral trade reached USD 128 billion in 2024, with extensive Indian imports of Chinese electronic components, telecommunications equipment, pharmaceutical ingredients, and industrial machinery – a structural dependence that constrains how far decoupling can go.

India's One China policy means it does not have formal diplomatic relations with Taiwan, which limits what it can acknowledge publicly about cooperation on semiconductor supply chains with Taiwanese firms. In practice, Taiwanese electronics manufacturing services (EMS) manufacturers operate manufacturing facilities in India (Foxconn has a significant presence, including in iPhone assembly). But these relationships are not institutionalised in bilateral technology frameworks. For the EU, this is relevant because it limits India's utility as an intermediary in any EU-Taiwan-India supply chain arrangement, though the practical industrial interdependencies remain regardless of their diplomatic framing.

## Other tech powers

A trilateral technology dialogue between India, the US, and South Korea was announced under the iCET, with the first meeting in Seoul taking place in March 2024. India's engagement with Japan and Korea on digital and semiconductor issues is primarily driven by supply chain investment flows – Samsung and SK Hynix have operations in India, and Japanese firms have participated in India's semiconductor development discussions. Yet there is no bilateral technology framework with either country of comparable depth to TRUST or the EU TTC.

India's most distinct contribution to multilateral digital governance is through the Global South. India used its G20 presidency in 2023 to place digital public infrastructure at the centre of the development agenda, promoting its digital public infrastructure stack internationally through bilateral partnerships with African, ASEAN, and Latin American governments. This positions India as an active standard-sponsor for digital governance in

developing economies, which both complements and competes with EU efforts to promote GDPR-compatible data protection and AI regulation through Global Gateway and development finance. India is a participant in the Quad Critical and Emerging Technology Working Group alongside the US, Japan, and Australia. This covers semiconductors, 5G/6G, AI, and quantum, and it intersects – but does not formally coordinate – with EU-level workstreams under digital partnerships.

### EU-India bilateral digital relations and frameworks

EU-India digital cooperation is anchored by the EU-India TTC, launched in 2023, which places India among the EU's most strategic technology partners alongside the US. The 16<sup>th</sup> EU-India Summit (January 2026) marked a significant deepening of relations, with the conclusion of the EU-India FTA, the start of an EU-India Security and Defence Partnership, and exploratory talks on India's possible association to Horizon Europe. The second meeting of the EU-India TTC (February 2025, in New Delhi) set out joint research initiatives under Horizon Europe on marine plastic litter and waste-to-renewable hydrogen, mobilising approximately EUR 41 million.

A co-funding mechanism for MSCA Staff Exchanges has been established through India's Council of Scientific and Industrial Research. In 2023-24, India earmarked 11 Horizon Europe calls for co-funding across AI, health, the climate transition, renewable energy, the circular economy, and ocean research. These arrangements illustrate how structured co-funding can deliver tangible R&I cooperation in the absence of formal Horizon Europe association.

### EU Member States and India

Germany is India's most active EU Member State partner in digital and technology cooperation. During Chancellor Friedrich Merz's visit to New Delhi in January 2026, Germany and India signed cooperation agreements covering semiconductor development, hydrogen, renewable energy, and business relations, along with an MoU granting Germany better access to Indian critical minerals. In February 2026, at the AI Impact Summit in New Delhi, Germany's Digital Minister Karsten Wildberger and India's IT Minister Ashwini Vaishnaw signed an India-Germany AI Pact, a flagship bilateral initiative for practical cooperation across government, industry, research, and skill development. The pact builds on earlier January 2026 agreements that laid the groundwork for joint projects on semiconductors, digital payments, and start-up ecosystems over the next two years. [Germany](#) has also announced a skilled labour mobility strategy specifically centred on India, aiming to recruit 90 000 skilled workers annually to address domestic shortages in technology-related sectors.

France's bilateral digital and technology ties with India are anchored in a strategic partnership rather than commercial semiconductor cooperation. In February 2026, French President Emmanuel Macron attended the AI Impact Summit in New Delhi, and the two countries elevated their relations to a 'Special Global Strategic Partnership'. They agreed to launch an India-France Innovation Network, a joint binational centre for digital sciences between INRIA and India's Department of Science and Technology, and a Joint Center for Advanced Materials.

A Letter of Intent on Defence Space partnership was signed in January 2024, and defence technology transfer – covering Rafale jets, Scorpene submarines, and drone co-development – has become a distinguishing feature of the France-India relationship relative to other European countries. On AI, space, and quantum, France is positioning itself as India's primary European partner at the frontier research level. The technical agreement between India's Defence Research and Development Organisation and France's Directorate of General Armaments for joint defence R&D, along with France's planned cooperation under its National Space Strategy 2025-40, explicitly include India as a [priority partner](#).

The Netherlands has emerged as a strategically significant bilateral partner through ASML. India's IT minister visited ASML's headquarters in Veldhoven in January 2026, indicating that the Dholera semiconductor fab would incorporate ASML lithography systems; ASML has indicated plans to set up a support office in India. MoUs signed in December 2025 outline a framework for cooperation on semiconductor supply chain resilience and digital security. ASML is now moving beyond a sales relationship to establish maintenance labs and technology-sharing initiatives within India. NXP Semiconductors already employs more than 3 000 engineers in India across multiple R&D locations. In addition, an Indian trade delegation visited Eindhoven in March 2026 to discuss semiconductor investments. According to the Dutch statistics agency CBS, the number of Indians resident in the Netherlands has tripled since 2014 to 89 000, with [Eindhoven](#) alone home to more than 10 000 Indian professionals in the technology sector.

The pattern across all three Member States is consistent with what has been observed in the section on Korea: bilateral digital and technology engagement between Member States and India is advancing faster and with greater specificity than the EU-level TTC track, and there is no systematic coordination between these bilateral agendas and the EU-level working groups. Germany's semiconductor and AI agreements, France's defence-technology and space partnership, and the Netherlands' ASML-centred semiconductor framework all address technology domains that are formally covered by

the EU-India TTC Strategic Technologies Working Group. But they are negotiated independently, without reference to TTC outputs or to each other's positions.

This fragmentation is not merely an EU institutional problem; interviewees in the India context have noted that India itself engages Member States bilaterally as a deliberate strategy, preferring the flexibility and depth achievable with individual governments over the slower pace and institutional constraints of EU-level frameworks.

### **Multilateral level including regulatory cooperation**

India is a distinct player in global digital governance, developing its own regulatory model rather than following either the US platform model or the EU's rights-based framework. Its Digital Personal Data Protection Rules (2025) diverge from the GDPR in key respects, including data localisation provisions, making a GDPR adequacy decision for India substantially more complex than the Korean precedent.

Meanwhile, India actively promotes its digital public infrastructure stack – Aadhaar, UPI, and DigiLocker – as an international model, particularly in the Global South through the G20 and bilateral development partnerships. It participates in ITU, ISO, and IEC standardisation processes, and – like Korea – should be treated as a distinct standard-setting actor rather than a standards adopter. India's leadership of the Global Partnership on Artificial Intelligence in 2024, under its G20 presidency, positioned it as a significant voice in AI governance multilateralism.

## 5. EU-TAIWAN DIGITAL RELATIONS: PROSPECTS AND CHALLENGES

### 5.1. TAIWAN'S DIGITAL TRENDS AND TECHNOLOGICAL PRIORITIES

Taiwan is one of the world's most digitally advanced economies, with strengths concentrated in hardware manufacturing rather than digital services or platforms. Its electronics industry spans the full supply chain from upstream semiconductors and advanced packaging to system assembly, with TSMC at its centre. Taiwan accounts for over 60% of global semiconductor foundry output and a dominant share of advanced node production.

Beyond TSMC, the sector includes a dense ecosystem of component and sub-system suppliers, the majority of which are small and medium-sized enterprises. Approximately 95% of Taiwanese technology firms are SMEs, which shapes the pace and mode of international engagement as large firms can commit to overseas markets more readily, while the wider ecosystem requires stronger institutional incentives to internationalise (stakeholder interview, 2026).

Government investment in digital infrastructure has been sustained over several decades. Taiwan's national technology parks follow a refined model of cluster management developed over decades, concentrating production capacity, talent, and supply chain linkages within defined geographical areas (stakeholder interview, 2026). The government has identified AI, sovereign computing infrastructure, quantum, robotics, and silicon photonics as priorities for the next phase of industrial development. In his [National Day address of October 2025](#), President Lai Ching-te announced an ambition to place Taiwan among the top five global hubs for compute infrastructure, including significant investment in AI data centres.

In the area of AI governance, Taiwan's Legislative Yuan passed the [Artificial Intelligence Basic Act](#) on 23 December 2025, promulgated on 8 January 2026. The Act's 20 articles establish foundational governance architecture without imposing direct compliance obligations on private actors – that task is left to sectoral legislation to be enacted within two years of implementation. Rather than prescriptive rules, the Act functions as a framework statute, articulating core principles and institutional arrangements that will shape future AI regulation in Taiwan.

Detailed obligations will be issued by sector regulators leveraging the risk classification framework to be developed by the Ministry of Digital Affairs (MODA), which was established in 2022. MODA is required to reference international standards and norms in developing an AI risk classification framework aligned with global practices, and to assist industries in formulating sector-specific guidelines and codes of conduct. Taiwan is

actively working to make its AI risk assessment approach compatible with the EU AI Act framework, without requiring identical legal models (elite interview, 2026). MODA's AI Impact Assessment and Benchmark Centre, operated through the Industrial Technology Research Institute (ITRI), provides the technical infrastructure for this work.

Taiwan also has significant strengths in digital resilience. The island faces persistent foreign information manipulation and interference (FIMI) from the PRC, and has developed a relatively advanced ecosystem of civil society organisations dedicated to fact-checking, information integrity, and democratic resilience. This civil society capacity is one of the distinctive features of Taiwan's digital ecosystem, as government-led responses to FIMI risk being perceived as politically charged, while civil society organisations can operate with greater independence (stakeholder interview, 2026).

## 5.2. DIGITAL GOVERNANCE AND KEY STAKEHOLDERS IN TAIWAN

Digital governance in Taiwan is distributed across several ministries, which creates coordination challenges for international partners. The Ministry of Economic Affairs (MOEA) holds the lead role for industrial policy, including hardware and semiconductor matters, and is the primary counterpart for investment and trade dialogues with the EU. For its part, MODA carries responsibility for digital transformation, the downstream processes of cybersecurity regulations, AI governance, and data protection. The split between MOEA (hardware, supply chain and industry) and MODA (software, platforms and digital policy) creates an agency problem for businesses (stakeholder interview, 2026). As a case in point, semiconductors fall under MOEA, but digital partnerships formally fall under MODA, making it difficult to address hardware-software interdependencies in a single dialogue.

Furthermore, the Ministry of Foreign Affairs (MOFA) retains the lead role for external digital diplomacy, adding a further layer of coordination. MODA's focus has been predominantly domestic, managing disinformation, the internal digital transformation, and civic technology; international cooperation has not been a primary priority. This has left MOEA's ITRI (discussed below) as the main operational actor for EU engagement on digital and technology matters. Once again, this creates a structural gap between the political ambition for EU-Taiwan digital cooperation, which is articulated at the MOFA and presidential levels, and the institutional capacity to deliver it.

Regarding the impact of this fragmentation on business-to-business relations, business associations are concerned about the disparity between the EU's pace of incentive deployment and the limited mobility of its supply chains, given the speed at which Taiwanese firms need to make investment decisions (stakeholder interview, 2026). An example is a [business proposal](#) to establish overseas science parks across Asia and the

Americas, Taiwan's traditional markets and collaborators. The EU does not yet appear prominently in this proposal but a cluster-based model for Taiwanese industry entry into European markets is a shared conclusion among business stakeholders (stakeholder interview, 2026).

On R&I collaboration, ITRI functions as the main institutional bridge between Taiwan's technology sector and international R&I partners. ITRI participates in multiple Horizon Europe projects, chairs the [Research and Innovation Network of EARTO](#) (the European Association of Research and Technology Organisations), and [opened a dedicated UK office in London in May 2025](#). ITRI currently facilitates engagement case by case, given that unified EU-Taiwan cooperation frameworks are not available (elite interview, 2026). However, due to the institutional fragmentation outlined above, case-by-case engagement, no matter how well established the R&I collaborations are, further contributes to the inability to mobilise a larger segment of economic actors on both sides and realise the full potential of EU-Taiwan digital relations.

### 5.3. TAIWAN'S RELATIONS WITH THE US, CHINA AND OTHER TECH POWERS

#### United States

The US has been Taiwan's principal security guarantor and technology partner. The economic relationship is built on deep supply chain integration, with Taiwanese firms supplying critical components and manufacturing capacity to US semiconductor and AI companies. US firms provide the design architecture, equipment, and advanced materials that Taiwan's fabs require.

Under the Trump administration, this relationship has become more transactional and less predictable. Taiwan faces higher tariff exposure than, for example, Japan, and lowering those tariffs is complicated by Taiwan's non-country status in formal trade law. According to various Taiwanese stakeholders, the Trump administration's disruption of transatlantic relations has consolidated the basis for cooperation with Taiwan among European partners, as the EU has stronger incentives to diversify and Taiwan has stronger incentives to build ties with the EU as an alternative anchor (stakeholder interview, 2026). The EU move to reduce its dependency on both the US and China may pave the way for deeper Taiwan engagement (expert interview, 2026). The European side also shares an impression of Taiwan strengthening the EU, Japanese, and US legs of its international relationships simultaneously, as it seeks to reduce dependency on any single partner (elite interview, 2026).

## China

Cross-strait relations remain the defining constraint on Taiwan's international digital engagement. The PRC objects to any form of relations with Taiwan that implies sovereign recognition, which is why the EU's representation in Taipei operates under the name of the European Economic and Trade Office rather than a standard EU delegation. This constraint applies to any EU programme or instrument that specifies 'countries' as eligible participants, effectively excluding Taiwan from full Horizon Europe association, digital trade agreements, and most multilateral standard-setting bodies. That said, innovation systems do not always follow national political signals. For example, cooperation between Taiwanese research institutions and their counterparts in France, Germany, and Spain has continued even when national government policies have been more accommodating towards Beijing (stakeholder interview, 2026).

Taiwan also faces sustained FIMI pressure from China, including disinformation campaigns targeting elections and public institutions. This has produced a domestic civil society ecosystem with considerable expertise in information integrity that has attracted interest from European partners. Yet, civil society organisations dedicated to this work are heavily dependent on project-based funding and have limited international reach without structural support (stakeholder interview, 2026). That is why civil society cooperation between Europe and Taiwan remains an under-explored field with prospects to contribute to regulatory convergence in digital governance.

## Other tech powers

Taiwan maintains close technology ties with Japan, built on supply chain complementarities in semiconductors and electronic components, and reinforced by Japan's JASM investment in Kumamoto. Arguably, Taiwan views Japan more as partner than a competitor, given that Japan and the US have benefited from Taiwanese component supply without Taiwan seeking to develop competing end-product brands (stakeholder interview, 2026). By contrast, with South Korea the relationship is more ambivalent, as both are advanced semiconductor economies with overlapping strengths. South Korean firms such as Samsung compete directly with Taiwanese firms in memory and, increasingly, foundry markets. Taiwan's strategy of engaging individual EU Member States rather than waiting for EU-level frameworks mirrors a pattern of bilateral-first engagement that it also applies in Asia.

#### 5.4. EU-TAIWAN BILATERAL DIGITAL RELATIONS AND FRAMEWORKS

Total bilateral trade in goods between the EU and Taiwan reached EUR 72 billion in 2024 (the EU imports EUR 43.3 billion, and exports EUR 28.6 billion), according to [European Commission trade data](#). Taiwan was the EU's 13<sup>th</sup> largest trading partner overall. The trade relationship is heavily concentrated in high-technology products: Taiwan accounts for 6% of EU high-tech imports (EUR 26 billion in 2024), with electronics/telecommunications the dominant category at 52% of those imports, according to [Eurostat](#). Bilateral trade in goods grew by 42% between 2020 and 2023. In services, EU-Taiwan bilateral trade stood at EUR 18 billion in 2022 (the most recent available Eurostat figure), up from EUR 13.9 billion in 2021, as per [EP Think Tank analysis](#).

On investment, cumulative EU FDI into Taiwan totalled USD 64.2 billion as of 2025, making the EU Taiwan's largest source of such investment. Taiwanese FDI into the EU reached USD 16.65 billion cumulatively, with 2023 alone recording USD 4.6 billion – a 750% increase on the previous year – driven primarily by TSMC's commitment to ESMC in Dresden, according to [Taiwan's Bureau of Foreign Trade](#). These figures place EU-Taiwan economic integration well above what the absence of a formal bilateral trade agreement might suggest, and substantially above the EU's formal diplomatic footprint.

The European Chamber of Commerce Taiwan and the European Economic and Trade Office, the EU's de facto representation in Taipei, formally designated as a trade and economic office rather than a diplomatic mission in line with the EU's One China policy, are the principal institutional intermediaries. The EU and Taiwan do not have a formal digital partnership, and the EU's One China policy means that a bilateral digital partnership agreement of the kind concluded with Japan, Korea, and Singapore is currently [not politically available](#). Cooperation occurs through a range of lower-profile channels that together constitute a substantive yet architecturally fragmented relationship.

The principal government-to-government digital dialogue is the EU-Taiwan Trade and Investment Dialogue (TID), conducted at the DG Trade level. The second TID, held in April 2023, agreed expert exchanges on digital trade, e-invoicing, e-signatures, semiconductors, and FDI screening. The 2018 DG CONNECT-led cooperation on digital trade with Taiwan was discontinued during the pandemic and has not been formally relaunched. The lack of structured EU-level exchange with Taiwan on cybersecurity is seen as a major gap given Taiwan's exposure and expertise (elite interview, 2026). The EU's International Digital Strategy (2025) nonetheless includes an annex with a specific call for Taiwan on 6G R&I cooperation focused on physical layers, advanced antennas, and AI-enabled radio access networks.

On the R&I side, Taiwan participates in Horizon Europe as a non-associated third country. Taiwanese entities can join consortia across many programme topics but must secure their own funding, which since 2022 has been facilitated through a co-funding mechanism established by Taiwan's National Science and Technology Council (NSTC). Taiwan participates in 17 EU partnerships, has been involved in 61 joint calls, and has 59 funded projects ([ERA-Learn, 2026](#)). ITRI leads the Taiwanese sub-consortium in the EU-funded [6G-SANDBOX](#) project, a consortium of ten companies and four universities, with Taiwanese reconfigurable intelligent surface antenna technology physically deployed and tested in Malaga, Spain, in February 2025. ITRI also chairs the Research and Innovation Network of EARTO, Europe's largest association of research and technology organisations.

In semiconductors, the EU Chips Act has created [a de facto governance link](#) because, under its [supply chain monitoring and crisis-response mechanism](#), Taiwanese authorities and industry engage with the EU's joint early-warning system, sharing supply chain information to anticipate and mitigate disruptions. TSMC's investment in [ESMC Dresden](#) (a EUR 10 billion fab co-owned with Bosch, Infineon, and NXP, scheduled for production from 2027) is the most consequential single instance of EU-Taiwan cooperation on digital investment. TSMC's high-NA EUV lithography machines are central to both EU and Taiwanese advanced semiconductor agendas. In total, [Taiwanese investment in the EU](#) reached EUR 14 billion by June 2025.

Taiwan is also interested in the EU's regulatory frameworks, particularly on data protection and AI governance. While Taiwanese stakeholders often flag the insufficient demand in European markets in now-saturated sectors like semiconductors as well as in emerging technologies like quantum (stakeholder interview, 2026), Taiwan views EU standard-setting capacity as a genuine strength (stakeholder interview, 2026). Even so, the mismatch between Taiwanese manufacturers and European demand also negatively affects regulatory convergence. Regulatory power does not automatically translate into technological competitiveness; the EU talks about services yet Taiwan's strengths lie in hardware and industrial production (stakeholder interview, 2026).

This observation about the structural asymmetry between the EU and Asian tech powers (perhaps with the exception of Singapore) confirms the findings of the [Draghi report on European competitiveness](#) (2024) and [ECIPE's analysis](#) of the EU's declining R&D share in technology hardware and electronic equipment. Nevertheless, cooperation on AI governance is arguably an easier near-term starting point than hardware collaboration, as impact assessment tools and alignment of AI risk taxonomies are areas where exchanges can proceed without requiring formal partnership status (elite interview, 2026).

The [UK-Taiwan Enhanced Trade Partnership](#) (signed in November 2023, with three non-legally binding pillars of investment, digital trade, and energy added in June 2025) is a [comparable framework](#) that offers a structured multi-pillar arrangement. In this framework, cooperation on digital trade, semiconductors, and investment do not require the political preconditions of a formal free trade agreement or diplomatic recognition (elite interview 2026). Both the EU and the UK hold annual trade and investment discussions with Taiwan, which have been upgraded in recent years, making the [‘officially unofficial’](#) partnerships the practical model for European engagement.

Non-governmental actors on the Taiwanese side describe difficulties in identifying the correct counterpart to contact on the EU side (stakeholder interview, 2026). EU diplomats have at times acknowledged limited bandwidth; with Japan and Korea requiring significant attention, there has been insufficient capacity to engage Taiwan with comparable depth (elite interview, 2026). Taiwanese semiconductor companies in particular have very limited knowledge of [how to engage with international governance actors beyond Washington](#). Building this capacity requires intermediaries operating at the interface of civil society and institutional governance.

The EU itself has recognised this gap. The [Chips Diplomacy Support Initiative](#) is an EU-funded programme that co-organised the first structured EU-Taiwan dialogue of the semiconductor industry in November 2025. It brought together over 40 senior representatives from European and Taiwanese semiconductor companies, research centres, think tanks, and diplomatic missions. A [2026 Institut Montaigne/CEIAS report on semiconductors in EU-Taiwan relations](#), co-funded by the EU, identifies the bridging of this institutional gap as a central policy priority.

## 5.5. EU MEMBER STATES AND TAIWAN

Taiwan's strategy has prioritised engagement with individual EU Member States over EU-level frameworks, partly by design and partly by necessity. Progress at the Member State level has outpaced EU-level progress, with Eastern European countries in particular having actively sought Taiwanese assistance in building semiconductor and ICT supply chain capabilities (expert interview, 2026). Czechia opened a [Taiwan Trade and Investment Service Center in Prague](#) in December 2024 to support the ESMC Dresden supply chain corridor. Taiwanese EMS manufacturers [Inventec](#) and [Wistron](#) operate manufacturing facilities in the Brno area, alongside Acer. [Poland concluded an MoU with Taiwan](#) in September 2022, establishing a bilateral working group on semiconductors and microelectronics. [Slovakia concluded seven MoUs with Taiwan](#) in October 2021, covering EVs, space technology, smart cities, and SME digitalisation.

Germany, France, Poland, and Czechia are the most prominently represented Member States in their engagement with Taiwan, though this has not translated into a unified or transparent EU-level approach (elite interview, 2026). ITRI has 14 institutional partners across EU Member States but engages with each on a case-by-case basis. Several Member States have concluded R&D MoUs with Taiwanese universities and research institutions; Germany is among those with bilateral agreements. The Taiwan Digital Diplomacy Association has cooperated with German universities on a semiconductor-focused research exchange. ITRI notes that even where national government policy may be less aligned with Taiwan – citing Spain’s shifting focus as an example – innovation agencies and research institutions often maintain cooperation independently, as has been the case with the Spanish agency and ITRI’s work on 6G-SANDBOX in Malaga.

The Netherlands occupies a structurally distinct position in EU-Taiwan relations through [ASML](#), the Dutch company that holds a global monopoly on the most advanced chip-printing machines – equipment without which no cutting-edge semiconductor can be manufactured anywhere in the world. TSMC [received one of ASML's most advanced new-generation lithography systems in late 2024](#), making the Netherlands-Taiwan technology relationship one of the most consequential bilateral dependencies in the global semiconductor ecosystem.

A further institutional bridge to Taiwan is provided by Belgium's [imec](#), a publicly funded research centre that functions as a pre-competitive R&D hub where competing chipmakers collaborate on next-generation processes before commercialising them independently. [TSMC, UMC, and Vanguard have longstanding research partnerships with imec](#), confirmed by imec's CEO in Taipei in 2024. In December 2025, [UMC licensed imec's silicon photonics process technology](#) – which uses light rather than electrical signals to transmit data, enabling faster and more energy-efficient chips for AI applications.

In addition, the [NanoIC pilot line, inaugurated at imec's Leuven campus on 9 February 2026](#), represents Europe's most advanced semiconductor research infrastructure to date. The EUR 2.5 billion facility, backed by the EU Chips Joint Undertaking alongside six Member States, is dedicated to developing chip architectures that push beyond the current frontier of miniaturisation. These will underpin the next generation of AI processors, autonomous systems, and quantum-adjacent computing.

The bilateral R&I architecture at the Member State level is more developed than the EU-level framework. Germany signed a [Scientific and Technological Cooperation Arrangement](#) with Taiwan in March 2023. It was the first such agreement Taiwan had concluded with a European government, covering semiconductors, AI, hydrogen energy, and batteries. It was signed during the first visit by a German federal minister to Taiwan in 26 years. The agreement has since been operationalised through a joint NSTC-BMBF

research programme on semiconductor chip design (2024-27), bilateral AI seminars in Berlin and Dresden in September 2024, and an MoU between Taiwan's AI Center of Excellence and Germany's DFKI (German Research Center for Artificial Intelligence).

France is Taiwan's second-largest European partner by the number of scientific agreements. The France-Taiwan bilateral [Science and Technology Cooperation Convention](#) was signed in November 2023, covering semiconductors, quantum, health, marine technology, cybersecurity, AI, green industries, and space.

This agreement builds on an established institutional infrastructure. For example, the [ANR-NSTC bilateral programme](#), the first ANR partnership with an agency outside Europe when it launched in 2007, has co-funded over 100 research projects involving nearly 300 researchers over 15 years. CNRS marked its 30<sup>th</sup> year of partnership with Taiwan in 2023. The PHC Orchid programme has supported nearly 200 Franco-Taiwanese research seed projects since its inception. Inserm also runs a joint exploratory mobility programme with NSTC in the life sciences. Finally, the [French Office in Taipei](#) hosted the first Franco-Taiwanese Science Meetings in Taipei in April 2024, with the [second edition held in Grenoble on 20–21 April 2026](#).

According to the [Central European Institute of Asian Studies](#), EU Member State approaches to Taiwan can be grouped into four categories:

- 'champions' (Czechia, Lithuania, and Slovakia);
- 'constructive engagers' (Denmark, Germany, France, Belgium, Poland, Romania, Sweden, and others);
- 'pragmatists' (Austria, Finland, Hungary, Italy, the Netherlands, Spain, and others); and
- 'laggards' (Bulgaria, Cyprus, Greece, Ireland, and others).

Finland and Sweden, classified as pragmatists, do not have documented bilateral agreements on S&T with Taiwan equivalent to those of Germany and France; their engagement remains primarily at the research institution level through Horizon Europe consortia.

## 5.6. MULTILATERAL LEVEL, INCLUDING REGULATORY COOPERATION

Taiwan's multilateral engagement is structurally constrained by its non-UN member status and exclusion from most intergovernmental bodies. Its membership of the WTO constitutes the basis for EU-Taiwan relations. Taiwan participates in the World Semiconductor Council alongside the EU, Japan, Korea, and the US, and is embedded in

the Chips Act supply chain early-warning mechanism. In 6G standardisation, the 6G Infrastructure Association (6G IA) and the Taiwan Association of Information and Communication Standards (TAICS) concluded an MoU in 2023, formalising information exchange on future 6G systems – the first such bilateral MoU in this domain. ITRI has a formal governance role within EARTO and has been appointed Track Co-Chair for the EuCNC & 6G Summit 2026 in Malaga.

On digital governance and regulatory cooperation, Taiwan is developing frameworks that are broadly compatible with EU approaches on data protection and AI governance, although through distinct legal models. Taiwan's Personal Data Protection Act predates the GDPR and shares some of its principles, but a formal GDPR adequacy decision for Taiwan would raise the same political sensitivities as Horizon Europe association. Taiwan passed a new law on data utilisation in 2025, drawing on both the EU Data Act and the EU Data Governance Act to set a framework for data usage. Taiwan also aims to align its AI risk taxonomy with the EU AI Act's risk categories, even where the legal architecture differs, and to make evaluation tools open-source and interoperable rather than duplicating effort (elite interview, 2026).

Taiwan is also engaged in international debates on information integrity and democratic resilience. Civil society organisations work on FIMI documentation and counter-disinformation, and have connections to European civil society networks (stakeholder interview, 2026). FIMI cooperation is sensitive because it overlaps with the National Security Council's domain. Approaches that are channelled through civil society rather than government are more likely to avoid being perceived as censorship (elite interview, 2026). Consequently, multilateral cooperation formats that include companies, NGOs, and research institutions from multiple countries are more preferable than purely bilateral government-to-government channels (elite interview, 2026; stakeholder interview, 2026).

Horizon Europe-style collaboration is a useful model but Taiwan can only be invited to join existing consortia, which limits the depth of cooperation compared with Horizon-associated countries. An MoU between the European Commission and the NSTC providing more structured and predictable co-funding arrangements – without requiring formal association – is identified by multiple interviewees as a realistic near-term step (stakeholder interview, 2026).

## 6. CONCLUSIONS AND RECOMMENDATIONS

The EU's International Digital Strategy is an ambitious plan to boost European competitiveness and contribute to multi-alignment at a time when the two superpowers are showing increasing signs of divergent, yet mutually reinforcing, decoupling in the markets for advanced and emerging technologies. The International Digital Strategy primarily relies on partnerships and dialogues with tech middle powers. The digital partnerships with Asian tech middle powers are shaped by two main factors, which are both strengths and weaknesses of the strategy.

One is that digital partnerships have near-term and long-term aspirations. In the near term, activating partnerships depends substantially on existing market linkages between firms. Joint ventures are one modality among several, alongside regulatory alignment, R&I consortia, and talent exchange, and their relative weight varies considerably across partners. Yet, beyond political motivations to diversify, the business sector in Asian tech middle powers finds that the European market alone does not offer sufficient commercial pull to justify the scale of investment diversification that partnership ambitions imply.

In the long-term, however, long-standing R&I collaboration should aim at creating mutually profitable joint endeavours. For example, Taiwanese companies in the semiconductor industry that have accumulated knowledge of US-led supply chains find it hard to diversify and invest in Europe. But there is more confidence among business circles that such accumulated knowledge can be acquired in emerging technologies, like quantum, as a result of policy steering.

Another factor is that digital partnerships have flexible institutional structures by design, to allow for new technologies and issues that may arise in the future. On the positive side, such flexibility leaves room for the inclusion of previously underrepresented stakeholders. On the negative side, the multitude of institutions involved on either side makes the decision-making process fragmented. As a result, much of Asia-Europe digital cooperation is decided at the Member State level.

### 6.1. MAIN FINDINGS

This report has assessed the EU's digital cooperation with Asian tech middle powers through case studies on five partners: Japan, South Korea, Singapore, India, and Taiwan. Each partner has been analysed in terms of its domestic digital and governance landscape, its external technology relationships, and the state of digital cooperation with the EU and Member States. Three findings emerge across all five cases.

The first relates to institutional fragmentation on both sides. On the EU side, digital partnership responsibilities are distributed across the EEAS, DG CONNECT, DG Trade, DG

RTD, and multiple other directorates-general, each with distinct mandates, timelines and interlocutors in partner countries. On the partner side, relevant competences are typically divided across three or more ministries. This fragmentation on both sides means that partnership governance is structurally underpowered relative to the ambition expressed in the EU's International Digital Strategy.

While digital partnership responsibilities are distributed across EU institutions, Member State-level engagement often advances independently and without systematic coordination with EU-level workstreams, as documented across all five case studies.

The second finding concerns variation across partners.

- Korea has the most complete formal architecture for EU cooperation – Horizon Europe association, a concluded digital trade agreement, GDPR adequacy for personal information, and an active Digital Partnership Council. But it encounters the most triangulation pressure between US commercial interests and EU regulatory norms.
- Japan has among the most deeply embedded industrial supply chains in the EU, built largely through automotive manufacturing, with Toyota, Nissan, and Honda operating production and R&D facilities in Europe and Japanese suppliers such as Aisin and Denso integrated into both Japanese and European carmakers' supply chains. Yet its participation in Horizon Europe has been the modest to date (although its association agreement was concluded in December 2025 and transitional arrangements from January 2026 are expected to substantially expand this going forward).
- Singapore is the most prolific rule-setter for digital trade globally, but is a genuinely polyaligned actor whose governance choices cannot be assumed to default to EU preferences. As of June 2026, the Horizon Europe negotiations with Singapore have stalled due to political concerns.
- India is the EU's most strategically significant partner by scale, and the only (Asian) country with which the EU has a Trade and Technology Council. Even so, cooperation faces the widest regulatory divergence and the most fragmented institutional architecture on both sides.
- Taiwan has the most economically consequential relationship with the EU in the semiconductor domain. Since 2020, the EU has seen USD 7.8 billion in Taiwanese investment, with TSMC's commitment to the ESMC Dresden fab at its centre. Still, it operates entirely without a formal partnership framework due to the constraints of the EU's One China policy.

The third finding is variation across sectors. Even within a single partnership, digital cooperation does not advance uniformly due to differences across economic priorities and industrial capabilities. Cooperation on semiconductor supply chains and R&I consistently outperform digital trade and regulatory governance work across all five relationships. Joint work on cybersecurity has high political salience but limited operational structure. Collaboration on 6G is most active with Korea, Japan and Taiwan. The EU-Singapore Digital Partnership includes 6G in its scope, but does not have a dedicated workstream as yet.

AI governance is where the most promising convergence is taking place. Korea and Taiwan are both explicitly seeking compatibility with the EU's AI Act, but no formal dialogue on AI governance has been established with any of the five partners at a depth equivalent to the existing trade instruments. However, it is important to note that the timeline for implementing the EU AI Act has shifted, with key provisions delayed or under review, complicating alignment with a moving regulatory target.

## 6.2. CHALLENGES WITH THE EU'S APPROACH

The EU's digital partnerships are an inherently complex instrument of external relations. Unlike regional frameworks (ASEAN and the Indo-Pacific Economic Framework) or multilateral institutions (the WTO and ITU), they have no overarching legal architecture, no binding dispute mechanism, and no permanent secretariat. The coexistence of interests in collaboration and competition among stakeholders on both sides is managed only through the steering capacity of the EU, itself divided across institutions, and partner governments, themselves divided across ministries. In this fragmented ecosystem, partnership goals are systematically underachieved.

Being 'like-minded' does not translate into an equivalent alignment of economic interests, institutional readiness or regulatory compatibility. Nor do shared democratic values. Korea, Japan, Singapore, India, and Taiwan all face triangulation pressures between the US and China that the EU cannot resolve, and each manages those pressures differently. The EU's partnerships are one input into each partner's strategic calculus, not the defining one. Digital partnerships, as currently designed, do not provide the EU with sufficient leverage to shift those calculi in its favour.

In the digital realm, the EU has already signalled an intention to transition from a hub-and-spoke system of bilateral partnerships to a network of partnerships in order to overcome these structural challenges. Systematic information exchange, joint R&I projects, and regular political and technical meetings, without undermining variation across partners or their desire to foster bilateral relations with the EU, will require a governance approach that eliminates the negative effects of institutional fragmentation.

### 6.3. RECOMMENDATIONS FOR THE EU

**Prioritise R&I collaboration as the primary means of aligning interests in the long term, given that trade and investment deals are more divisive in the short term.**

Trade and investment negotiations generate short-term friction because they directly implicate commercial interests, regulatory sovereignty and market access. R&I collaboration generates alignment over time, through shared research agendas, joint career structures and accumulated institutional trust, without requiring immediate convergence on regulatory models.

The Korea Horizon Europe association offers the clearest evidence in this report of what R&I cooperation can produce. Its deliverables encompass four joint semiconductor projects through the Chips Joint Undertaking, dedicated calls on quantum computing under EuroHPC, and calls on 6G under the Smart Networks and Services Joint Undertaking. The EU should treat Horizon Europe association not merely as a funding mechanism but as its most powerful instrument for long-term digital alignment. It should accelerate association negotiations with Singapore while developing credible association-equivalent pathways for India and Taiwan that do not require political breakthroughs.

For Taiwan, an MoU between the European Commission and the National Science and Technology Council formalising co-funding arrangements beyond outsourcing partners would give Taiwanese participation the predictability it currently lacks without triggering One China policy constraints. R&I collaboration is not a universal solution, but is the channel with the least short-term political friction, particularly where formal trade instruments are unavailable.

**Build up the network by systematically engaging European and partner-country SMEs, start-ups, labour organisations, and civil society in R&I. Include these groups in debates on regulations to secure stakeholder buy-in and align the long-term interests of the private sector.**

SMEs, start-ups, labour organisations and civil society are underrepresented in digital partnerships even though SMEs constitute the majority of Asian technology firms, beyond the eye-catching 'national champions'. The high-level internationalisation of the national champions overshadows the fact that most SMEs and start-ups either lack the institutional capacity for international outreach or have a track record confined to regional or US-based supply chains. The EU should proactively coordinate with the existing networking platforms, such as the Taiwan-chaired EARTO Research and Innovation Network, and offer internationalisation training and opportunities to SMEs and start-ups.

The EU can also actively encourage the participation of partner countries and civil society in multilateral governance fora, such as the ITU. This is especially relevant for Taiwan and other small states aligned with Taiwan, and for those frameworks where Taiwan's exclusion from formal membership creates governance gaps.

While engaging with SMEs and start-ups involves co-funding, cluster matchmaking and international training, engaging with civil society should be done through open regulatory consultation and minilateral governance formats. Civil society organisations working on foreign information manipulation and digital resilience are doing work that the EU values, but their reach depends on their access to stable funding sources. Plans for the Tech Business Offer and digital partnership implementation would benefit from actively including SME and civil society engagement, rather than treating it as a secondary objective.

#### **Develop sectoral minilaterals across digital partnerships to facilitate a network approach without undermining bilateral relations.**

The EU should develop sectoral minilaterals, such as working groups on AI governance, 6G standardisation, and semiconductor supply-chain transparency, which include multiple Asian partners while simultaneously maintaining each relationship as a separate bilateral track.

For example, an EU-Asia dialogue on AI governance that includes Korea, Japan, Singapore, India and Taiwan would serve multiple goals: (i) it would create institutional linkages between the partners' regulatory frameworks on AI and the EU AI Act; (ii) it would generate the network effects that the bilateral model cannot; and (iii) it would give Taiwan a meaningful form of participation in multilateral governance that its exclusion from formal international bodies otherwise prevents. These formats should operate at the level of research institutions, companies and standards bodies rather than governments, following models such as the MoU of the 6G Infrastructure Association/Taiwan Association of Information and Communication Standards, and chairmanship of EARTO by Taiwan's Industrial Technology Research Institute.

### **6.4. RECOMMENDATIONS FOR TAIWAN**

#### **Map and consolidate existing institutional and civil society cooperation to identify gaps and issues.**

Taiwan's cooperation with EU counterparts is, as this report has documented, more substantial than its formal diplomatic status suggests. Though relatively invisible, R&I institutions and societal stakeholders are leading actors in EU-Taiwan digital relations. Cases in point are its Horizon Europe project participation, the NSTC co-funding

mechanism, the 6G IA/TAICS MoU, the ANR-NSTC bilateral programme, the investment forum of the European Chamber of Commerce Taiwan, and ITRI's role in EARTO. But these cooperative efforts are dispersed and not consistently legible to EU interlocutors. Mapping them would make the present institutional capacity visible and turn them into available tools for SMEs, start-ups, and civil society organisations on both the European and Taiwanese sides.

### **Pursue pathways to formalise Horizon Europe co-funding.**

The EU's most like-minded partners in Asia are incrementally formalising their R&I relationships through Horizon Europe. Since 2022, Taiwan's NSTC has co-funded Taiwanese participation in Horizon Europe consortia, covering costs that association would otherwise cover, but without the earmarking and thematic priority access that formal association provides. Taiwan cannot pursue formal association under current political conditions, but the NSTC co-funding mechanism already enables Taiwanese participation in Horizon Europe projects as a non-associated external partner. As a result, Taiwan participates in 17 EU partnerships, 61 joint calls and 59 funded projects, according to the ERA-Learn portal.

All the same, the non-associated status does not allow structured participation in Horizon Europe calls and therefore is not conducive to long-term collaboration in emerging technologies. A non-binding administrative and scientific agreement that does not require Member State unanimity, between the European Commission and the NSTC, would give this participation the institutional foundation it currently lacks. It should cover co-funding arrangements, joint thematic priorities and mutual recognition of research quality standards.

### **Foster the convergence of technology markets by helping Taiwan's stakeholders to take part in EU consultations and standards-setting**

Taiwan's companies face direct exposure to the EU AI Act, the EU Data Act, the Cyber Resilience Act, and the EU Chips Act supply-chain disclosure requirements. These compliance requirements affect the access of Taiwanese firms to the EU market. Taiwan's government, through its economic, digital and foreign ministries, should promote the participation of Taiwanese business and civil society in the stakeholder processes around these regulations. The European Chamber of Commerce Taiwan and the Trade and Investment Dialogue can serve as entry points.

## APPENDIX. LIST OF INTERVIEWEES

*The interviews were held solely for this report. The interviewees listed below consented to being acknowledged in this research; the remaining interviewees participated on the condition of anonymity.*

Chan, Kendrick, LSE IDEAS, London School of Economics

Chen, Michele, and Christine Chou, Industrial Technology Research Institute (ITRI), Europe Office

Chen, Prof. Shin-Horng, National Chengchi University / Chung-Hua Institution for Economic Research (CIER) – written response

Chen, Dr Shin-Horng, Chung-Hua Institution for Economic Research (CIER), Taipei

Fatelnig, Peter, Digital and Science Attaché, EU Delegation Tokyo (EEAS)

Guellner, Lutz, European Economic and Trade Office (EETO), Taipei

Huang, Chris, Market Intelligence and Consulting Institute (MIC) / Institute for Information Industry (III), Taiwan

Kerneis, Pascal, European Services Forum (ESF), Brussels

Kim, Dr Jeong-Gon, Korea Institute for International Economic Policy (KIEP), Seoul

Kuo, Chiayo, Taiwan Digital Diplomacy Association (TDDA)

Misuraca, Gianluca, Digital Policy Alliance (DPA); formerly at the European Commission Joint Research Centre, Brussels

Park, June, Political analyst (independent), Doha

Taiwan Electrical and Electronic Manufacturers' Association, Taiwan

Watanabe, Tomoaki, Center for Global Communications (GLOCOM), International University of Japan

Wesley, Rainer, Digital and Science Attaché, EU Delegation Seoul (EEAS)

Yang, William, International Crisis Group, Taipei

### Additional interviewees

Diplomatic representative, Brussels

EU official, Brussels

European business stakeholder, Brussels

European technology association, Brussels

Government official, Taiwan

Member State business stakeholder, Seoul

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