

MSC Technology Roundtable Brussels 2025

Taking Stock of the Tech Stack: Security, Independence, and Tech Competition

October 15, 2025 | Concept Note

[Strictly confidential – no distribution]
5/8/2025

Date, Time & Location

The MSC Technology Roundtable will take place at the Association de la Noblesse du Royaume de Belgique in Brussels on October 15, 2025.

Format

MSC Roundtables bring together an intimate group of some 35 high-profile participants for an interactive debate on a specific security policy challenge. Roundtables are held under Chatham House rule or off-the-record and take place throughout the year.

This event is part of the MSC's Technology Program. With this program, the MSC aims to advance the debate on the regulation, governance, and use of technology to promote inclusive security and global cooperation. To that end, various MSC event formats, publications, and initiatives seek to bridge the worlds of technology, politics, and security by facilitating productive exchanges between decision-makers and experts at the highest level.

After Cyber Security Roundtables in Brussels in 2023 and 2024, the MSC will return to the “capital of Europe” every year to continue to build a strong network of technology stakeholders, facilitate regular dialogue between key actors, and encourage open and impactful debates on the most pressing issues of technology and cyber policy.

Partners

The Technology Roundtable in Brussels will be supported by a number of partners and institutions, including the State Office for Information Security of the Free State of Bavaria.

Background & Purpose

One year ago, the European Commission made “competitiveness” the North Star of its policies. This agenda is playing out across various fields but nowhere more than in the area of technology. European initiatives are targeting all layers of the so-called “tech stack” – from underground critical minerals to outer space infrastructure, or from semiconductor hardware to cybersecurity software. Indeed, the need for Europe to compete in the race for technological leadership and resilience has only become more pronounced. The US administration has declared a full-speed-ahead approach to the race for dominance in future technologies, and the tug-of-war over chips and other tech resources between the US and China is heating up. While Beijing continues to encroach on technology sectors critical to European economies, Washington, too, is not shying away from using Europe's dependencies for political leverage. In areas like semiconductors and space capabilities, Europe faces tough questions about where it can find compromises or even common ground with technology partners, and where it must double down on resilience or even independence.

Heading into year two of the competitiveness agenda, it is time to take stock of Europe's tech stack in three priority areas: its technology ties with the US, its access to critical semiconductors, and its position in the new “space race.” What is the state of transatlantic tech diplomacy and cybersecurity cooperation? Which dependencies can be solved through tighter collaboration and which through diversification? How are Europe's efforts to promote semiconductor production playing out? Has the EU

Chips Act borne fruit, or is a version 2.0 needed? Is the European space sector globally competitive? How can the EU's Space Act and space program funding give it a boost?

With this Roundtable, the Munich Security Conference aims to address these and other key tech and cyber policy questions, assessing the trajectory of technology competition and Europe's position in it.

Participants

The event will bring together a group of some 35 high-ranking decision-makers, including policymakers, technology sector representatives, civil society organizations, and other technology experts.

Agenda

Wednesday, October 15

Association de la Noblesse du Royaume de Belgique

1.30 p.m. – 2.30 p.m.

Registration and Welcome Coffee
Foyer

2.30 p.m. – 4.00 p.m.

Discussion Session

Unfriended? Potential and Pitfalls for Transatlantic Technology Ties

Grand Salon Jardin

- How do values and economic considerations shape US and EU positions on regulating the digital sector? What are the key points of contention, and where is there potential for compromise or even cooperation?
- What role did European digital regulation and its enforcement play in US-EU trade negotiations? How does the agreement reached in July influence the EU's agenda regarding the digital sector? How susceptible to coercive pressure is Europe given its stark dependency on the US in the in military and security matters?
- In light of technology dependencies highlighted by the “EuroStack” papers, the EU's update on the “Digital Decade” and its International Digital Strategy, how can Europe strengthen partnerships for a more resilient technology supply? What can be done to put European reliance on the US technology sector on a more stable and sustainable footing?
- What does the US administration's AI Action Plan signal regarding transatlantic technology cooperation? How will the US's pursuit of its AI strategy affect European efforts on AI capabilities and safety?
- Where does transatlantic cooperation between tech practitioners in areas like cybersecurity or technical standards stand? How, if at all, are these areas affected by current political dynamics?

4.00 p.m. – 4.30 p.m.

Coffee Break
Foyer

4.30 p.m. – 6.00 p.m.

Discussion Session

Fishing for Chips? Next Steps to Boost Semiconductor Resilience

Grand Salon Jardin

- How can the European chip industry capitalize on its strengths and mitigate its weaknesses? What are realistic goals for European chip capabilities, and what strategic choices should Europe make towards that end?
- What are the implications of securing access to cutting-edge semiconductors for Europe's tech and cyber ambitions, such as the establishment of AI "gigafactories"?
- What is the track record of the EU Chips Act, and what should a European follow-up initiative on semiconductors do – if anything? What is the significance of initiatives by member states, like the Semiconductor Coalition, and how can they harmonize with EU measures?
- How have European companies in the semiconductor industry been affected by US tariffs and export controls? What policy support does the European semiconductor industry need to weather tensions in global trade and security relations?
- How have US semiconductor policies, especially export controls, played out in the technological competition with China? What will the future direction of semiconductor competition with China be in the larger context of US-China trade policy, and what could the effects on Europe look like?

6.30 p.m. – 8.30 p.m.

Reception & Dinner Discussion

Year 2.0: One Year Into Europe's Tech Competitiveness Agenda

Grand Salon Avenue

- What are the most substantial achievements fostering Europe's tech competitiveness in the first year since the new EU Commission took office?
- How has Europe fared in terms of mobilizing public and private investment for strategic tech sectors (e.g., AI, semiconductors, cloud, quantum)? What role can the European Competitiveness Fund, proposed as part of the upcoming multiannual financial framework (2028-2034), play in accelerating tech innovation?
- What is the right balance for the EU between enshrining its values in legislation while also ensuring competitiveness? How can the values-based approach of the EU be a competitive advantage rather than a liability?
- How does the current geopolitical environment, which is increasingly focused on national rather than common gains, impact Europe's competitiveness in tech?

9.00 p.m. – 10.00 p.m.

Night Cap Session

Starry-Eyed or Down to Earth? Assessing European Ambitions in Space

Salon des Jeunes

- Against the backdrop of the European Space Agency turning 50, what are the greatest achievements of Europe's space program, and what are its biggest challenges? In the next 50 years, what will the future of space exploration look like, and which players will lead the way?

- How does easier access to space outside of space agencies and aeronautics industry groups change the space industry? How can space traffic be organized in a sustainable and secure way, and how effective will zero debris policies be?
- How prepared is Europe for modern warfare that is heavily reliant on space capabilities? How can space assets be secured against kinetic and non-kinetic threats such as cyberattacks?
- How can countries mitigate risks associated with their dependence on commercial actors for critical space capabilities? What alternatives to US-based companies are there, and how helpful will IRIS2 be in overcoming Europe's dependencies?
- Which steps are necessary for Europe to attract more private funding in the space field? What role does the planned EU Space Act play in this regard?

Contacts

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