Clingendael
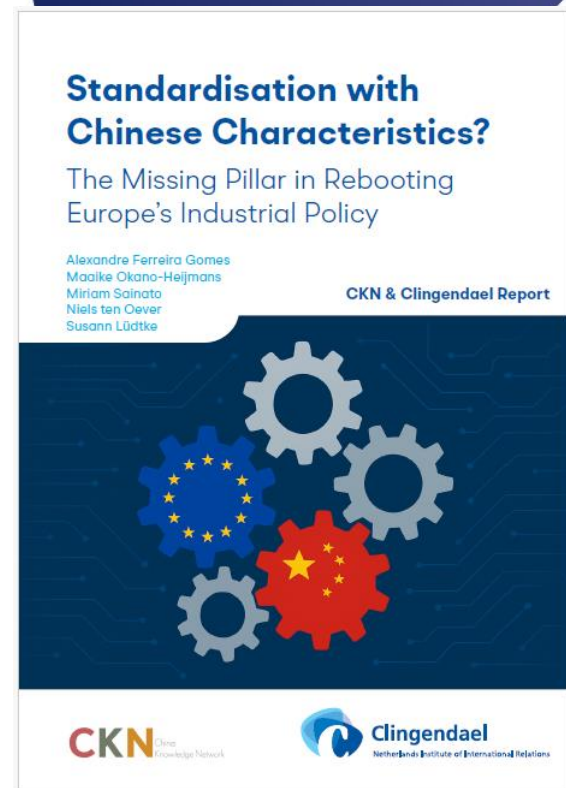Netherlands Institute of International Relations

Standardisation with Chinese characteristics?
The Missing Pillar in Rebooting Europe's Industrial Policy

08 July 2025

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CKN & Clingendael Report

CKN China Knowledge Network

Clingendael
Netherlands Institute of International Relations

Agenda

1. **Opening** | Dr. Maaike Okano-Heijmans

2. **Report presentation** | Alexandre Ferreira Gomes

3. **Panel discussion** | Panelists:
   — Willemien Bosch, Director Policy, Confederation of Netherlands Industry and Employers (VNO-NCW en MKB Nederland)
   — Jos Remy, Director Standardization, Philips
   — Meyndert van der Kolk, Member of the Board, Directorate European and International Affairs, Ministry of Economic Affairs of the Netherlands

4. **Q&A**

5. **Closure**

What are (technical) standards?

Standards are **documented and reproducible technical specifications** that are typically adopted **voluntarily**

They are produced in a described **procedural** manner and **accessible under defined conditions**.

They enable the **organisation of production and the exchange of goods and services**.

"Whoever owns the standard, owns the market."

Why Standards Matter | The Strategic Stakes

"Standardisation defines the rules of engagement for future technologies"

Standards as a Geopolitical Tool
— Standards shape **trade, digital ecosystems and innovation**. Ultimately, they also shape national and economic security.
— Important for **critical emerging technologies but also for mature technologies**.

China's Strategic Approach
— Standards are **fully integrated in national policies** (e.g., China Standards 2035, Digital Silk Road), and link public, academic, research and private sectors closely.

EU's Position
— Historically dominant, but **losing influence** over time.

China's Playbook: State-Backed Power

"Third-tier companies make products; second-tier companies make technology; first-tier companies make standards."

Integrated Strategy
— China practices **state-led orchestration**, aligning policy, research, industry, and diplomacy to drive standard-setting internationally.

Resources and Tools
— **Financial incentives** and rewards encourage firms and experts to engage in standard-setting.
— **Mirror committees** (870+ national mirror bodies) are quickly organised to replicate the work done in international bodies.

Rapid Rise
— From **regional dominance to global influence**. E.g.: China is now the #1 participant in ISO Technical Committees, and holds a growing number of secretariat roles.

Europe's Gaps: Reactive and Underpowered

"Functions that are taken as full-time jobs in China are considered side projects in the Netherlands."

Missed Opportunities
— **Lack of early engagement** means Europe often reacts to proposals rather than shaping them.

Governance and Coordination Issues
— **Fragmented representation** in international bodies weakens Europe's voice.
— **Belated and slow reaction** to international developments limits influence in Technical Committees.

Resource and Capacity Shortfalls
— European participation is often **underfunded and part-time**.
— **No EU-wide mechanism to track or analyse China's progress** or power shifts in standardisation.
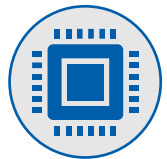
Industry Snapshots: Telecom & EV Chips

"Technical standards are not neutral – they underpin future markets."

Telecommunications and the Internet

— China plays an **increasingly important role in international bodies** like 3GPP and ITU, shaping next-gen standards for 5G, 6G, and beyond.

— China, led by Huawei, proposed a **New IP architecture**, challenging today's open internet model and signaling how China may want to use SDOs to **technically push its worldview on digital matters**.

Electric Vehicle Chips

— China promotes a **vertically integrated approach** – aligning chip policy, EV strategy, and standardisation (e.g., via MIIT and CACA).

— Push to lead in **mature chip nodes relevant to electric vehicles and battery control systems**, threatening competitors like NXP in the Netherlands.

Blueprint for Action: Policy Recommendations

"Impactful engagement requires sustained, long-term investment aligned with broader industrial and strategic goals."

01 Programming — Make standardisation a **core pillar of industrial strategy**.

02 Promoting — **Align R&D, IP, and tech investments** with standard-setting leadership.

03 Protecting — **Monitor** strategic shifts; **guard against asymmetrical access**.

04 Partnering — Build **EU coalitions + alliances with partners** like Japan, Korea, India, UK.

05 Process — Improve **transparency, early engagement, and stakeholder inclusion**.

Final Call – Defining the Digital and Industrial Order

"If standards define the playing field, then failing to shape them means competing on terms set by others."

Patience
— Standardisation processes span years, but the **initial phases are decisive**.
— Influence must be built up through **sustained, long-term participation – not one-off interventions**.

Prioritisation
— **Avoid overstretch**: concentrate resources where it counts – focus in priority areas instead of competing on every front.

Strategic Goal
— **Shape global tech norms** in line with European values, economic interests, and sovereignty goals.

Panel discussion

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— **Jos Remy**, Director Standardization, Philips

— **Meyndert van der Kolk**, Member of the Board, Directorate European and International Affairs, Ministry of Economic Affairs of the Netherlands

Moderated by:

—**Maaike Okano-Heijmans**, Programme Lead Clingendael Geopolitics of Technology and Digitalisation

Plenary Discussion

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