

#39 Standardisation with Chinese Characteristics?

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Key Takeaways

- Europe must see standardization not as a niche technical field, but as a key site of geopolitical contestation and opportunity.
- Europe has historically occupied a central position in international standardization.
- China has aligned industrial champions, state institutions and global diplomacy behind a shared objective: embedding Chinese standards in the global economy of tomorrow.
- This report proposed a blueprint for action on standardization along programming, promoting, protecting, partnering and process. These parallel paths should help reorient the stance of the EU and its Member States on standardization.

Blueprint for Action

1. **Programming:** strategizing standardization. Standardization should be considered part of an overarching industrial and technological policy and we must orchestrate the private sector.
2. **Promoting:** aligning industrial priorities and global standards' leadership ambitions. Develop an agenda focusing on policies to foster research and innovation, intellectual property and patents development.
3. **Protecting:** defending strategic technologies, detecting power shifts. Protecting EU standardization requires controlling tech transfers, monitoring China and boosting competitiveness.
4. **Partnering:** mobilizing local action and European alignment to achieve global impact. EU leadership in standardization requires partnering with allies, aligning priorities and managing China engagement.
5. **Process:** scanning opportunities, selecting priorities and scaling what works. Improving standardization requires more resources, transparency, strategic participation, early engagement and human rights impact assessments.

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Executive Summary

Standardisation is emerging as a strategic battleground in global technological competition. Once confined to technical experts and engineers, standard-setting now plays a central role in shaping industrial ecosystems, global trade, interoperability, innovation flows and dependencies in digital infrastructures and applications, ranging from 5G to AI chips and from steel quality to digital public passports. As the geopolitical dimension of technology becomes more pronounced, the ability to influence standards is a key driver of competitiveness and sovereignty.

Europe has historically occupied a central position in international standardisation, starting from the founding of the Geneva-based International Telecommunications Union (ITU) in 1865. While the European Standardisation Strategy of 2022 signalled political attention, the current posture of the EU and its Member States remains out of step with the pace and coordination of other global actors, mainly China. Through an integrated strategy that connects domestic industrial policy and foreign affairs, China has transformed from a reactive standards-taker into a proactive standards-maker since 2018. Initiatives such as ‘China Standards 2035’, in tandem with the Belt and Road Initiative, have enabled China to align industrial champions, state institutions and global diplomacy behind a shared objective: embedding Chinese standards in the global economy.

The European Union and its Member States remain largely reactive. Despite a strong base in research, industry and international engagement, the EU’s 2022 standardisation strategy lacks key implementation steps. Its approach is fragmented, under-resourced and slow to align technical influence with broader economic and political goals, risking ceding control over future rule-making processes in areas from digital communications to automotive chips.

This report argues that Europe must see standardisation not as a niche technical field, but as a key site of geopolitical contestation and opportunity. Its focus is on China and rapidly developing technologies that shape digital societies and economies. Building on an analysis of standard-setting organisations, the focus turns to the design and consequences of China’s state-led approach, including the empowerment of companies and experts and the roll-out of technologies through the Digital Silk Road.

To reassert European strength, the report offers a five-pronged approach aligned with the Economic Security Strategy of 2023, centred on programming, promoting, protecting, partnering and process. Standardisation must be embedded in industrial strategy, with early engagement, stronger coordination, scaled-up resources and alliances with like-minded partners.

The stakes are particularly high for the Netherlands, a European leader in key technologies such as chip equipment and quantum technologies, with major assets in semiconductors and digital infrastructure. Standardisation defines the rules of engagement for future technologies, and without strategic action, Europe risks becoming a bystander in a system shaped by others.