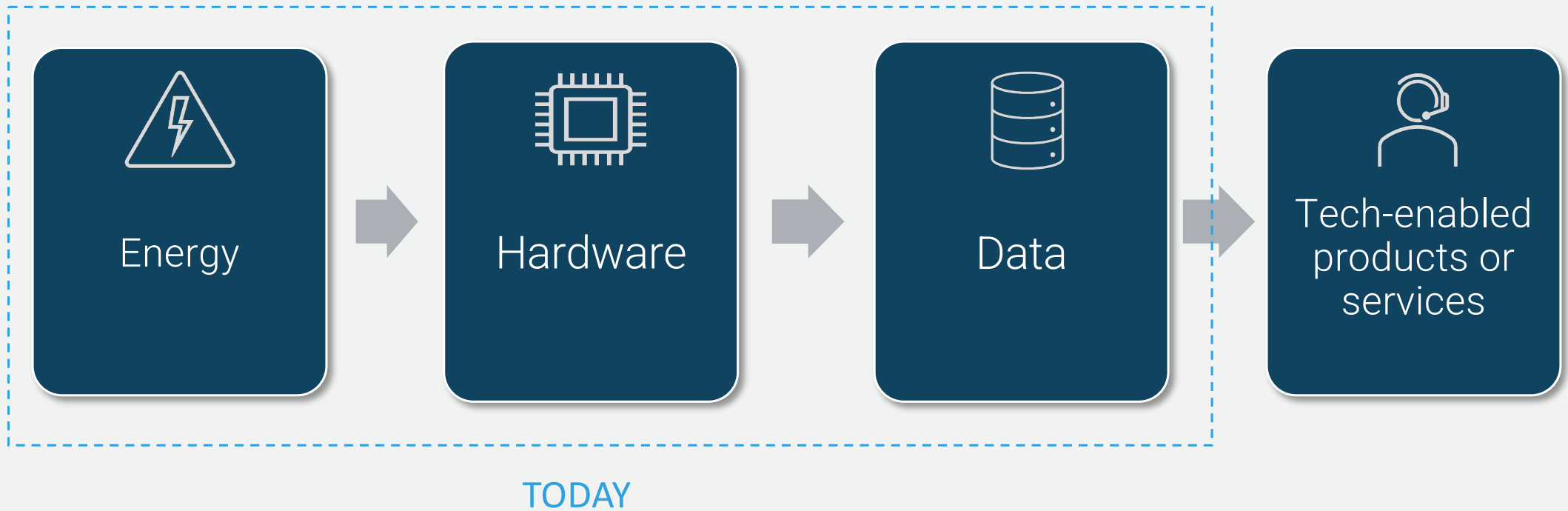


# Promoting Bricks, Chips and Bits

Recent government policy changes along the technological value chain

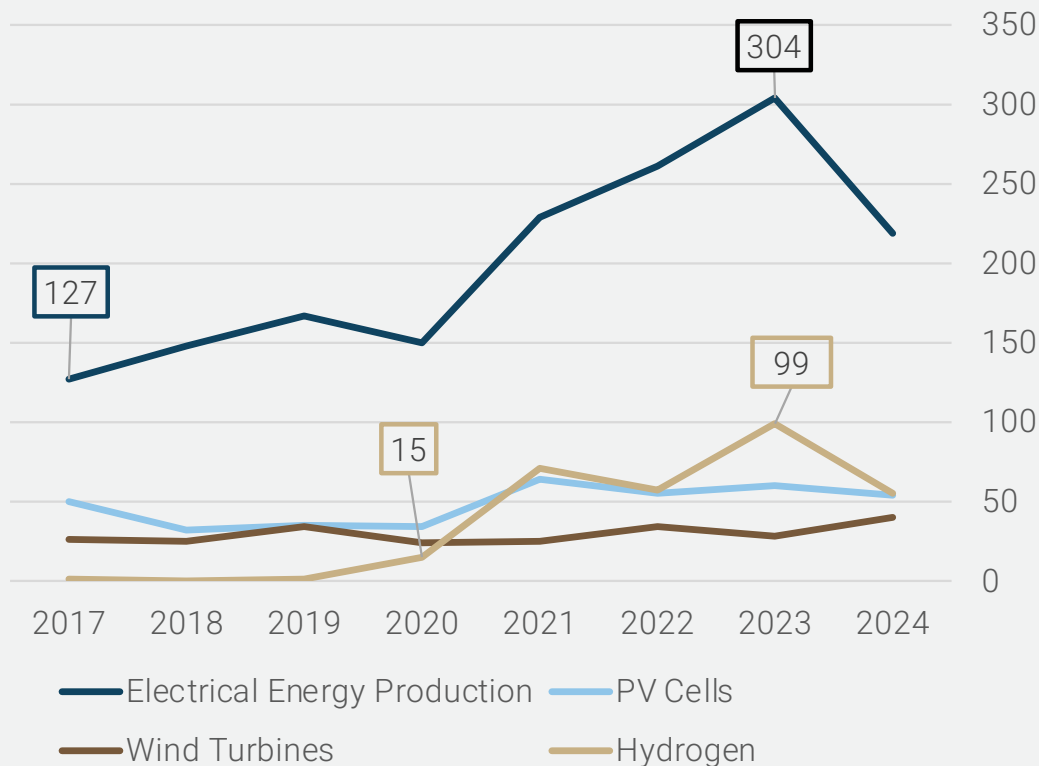
# A Simplified Technological Value Chain

Organising framework for this talk



# Bricks: State Support for Energy Production is Rising

Number of announced subsidies in world's 60 largest economies

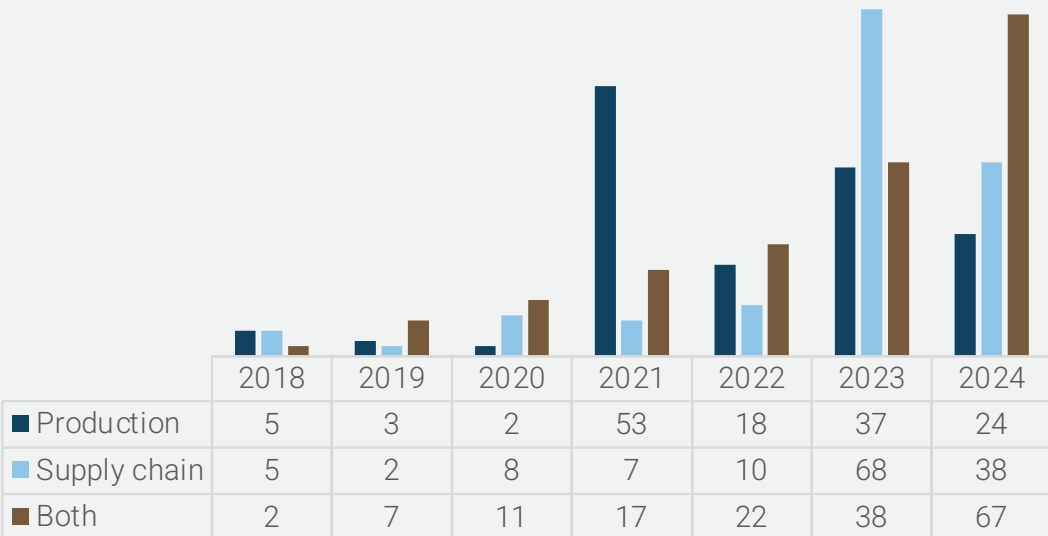


- General support measures for domestic energy production rising steadily since 2017
  - Steady support for solar & wind
  - Increasing attention to hydrogen production
- Officially stated motives are
  - climate change mitigation (32%)
  - competitiveness (12%)
  - security of supply (10%)

# Chips: Subsidies to Production and Supply Chain Spiked With the AI Boom



Number of announced subsidies to semiconductor value chain



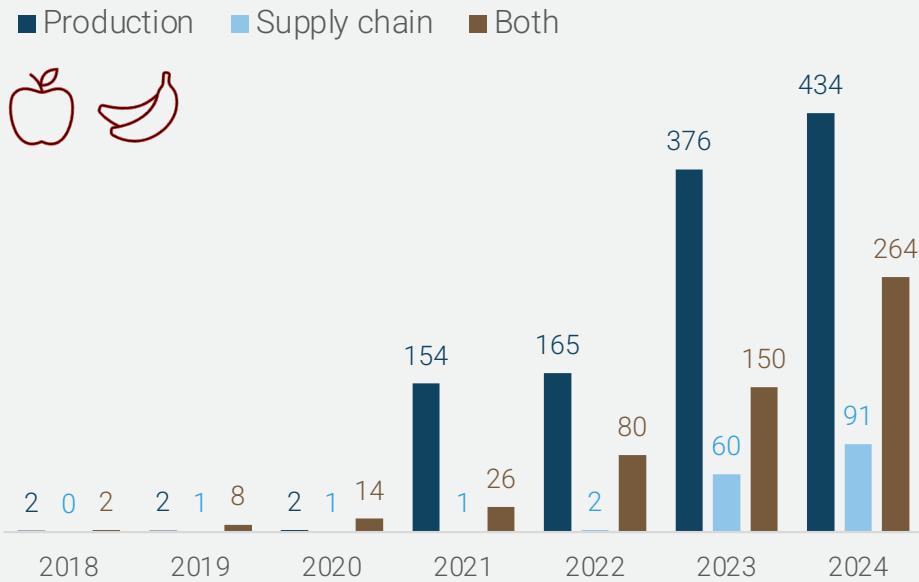
Most active jurisdictions

Implementer	Production	Supply chain
India	70	112
China	67	48
Japan	73	31
USA	52	51
Italy	28	22

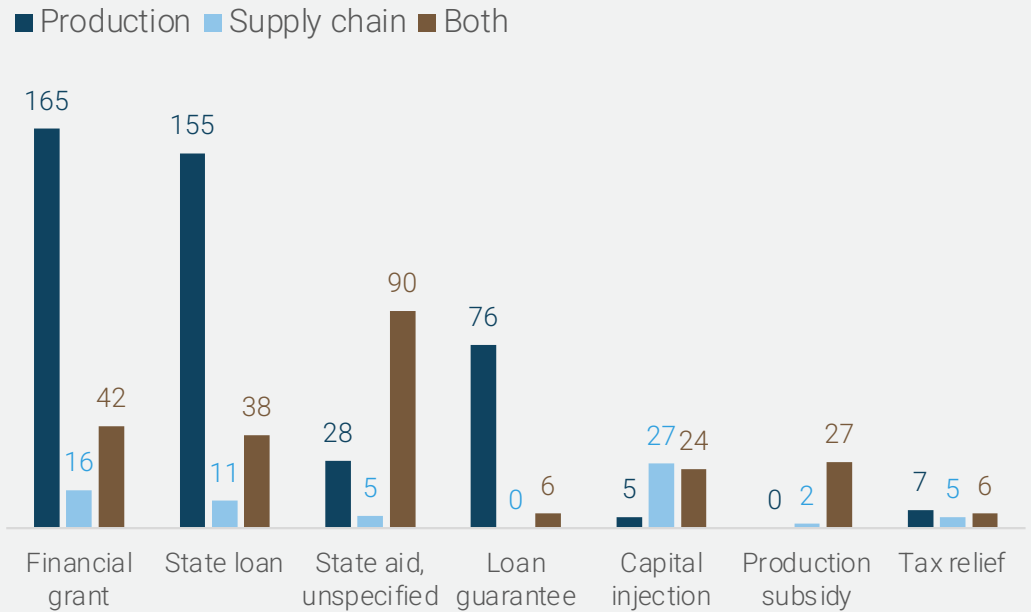
By number of announced subsidies

# Chips: Production dominates subsidy volumes

Cumulative envelope across instruments in USD billion

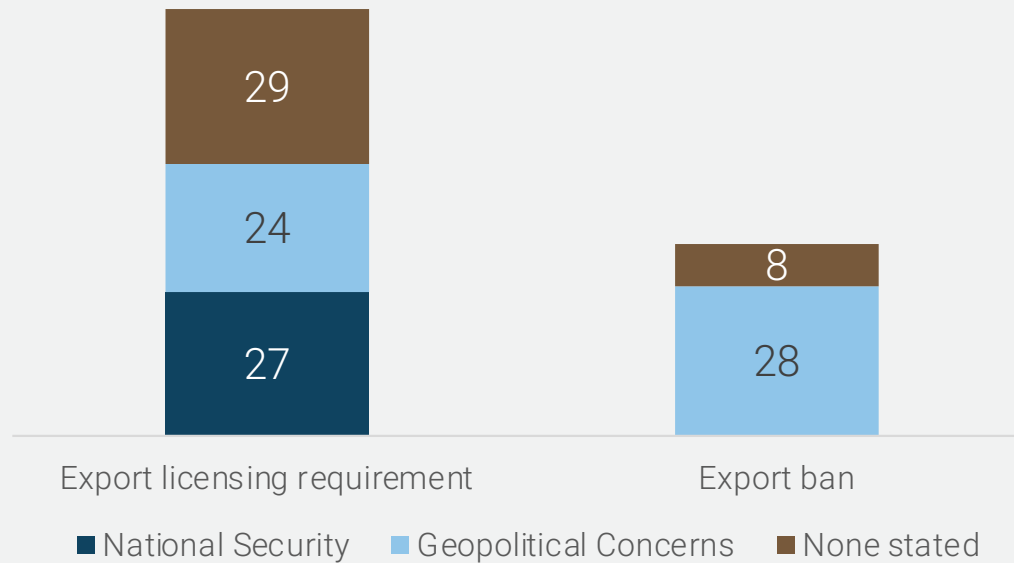


Subsidy volume in USD billion 2018-2024



# Chips: Security concerns motivate export curbs

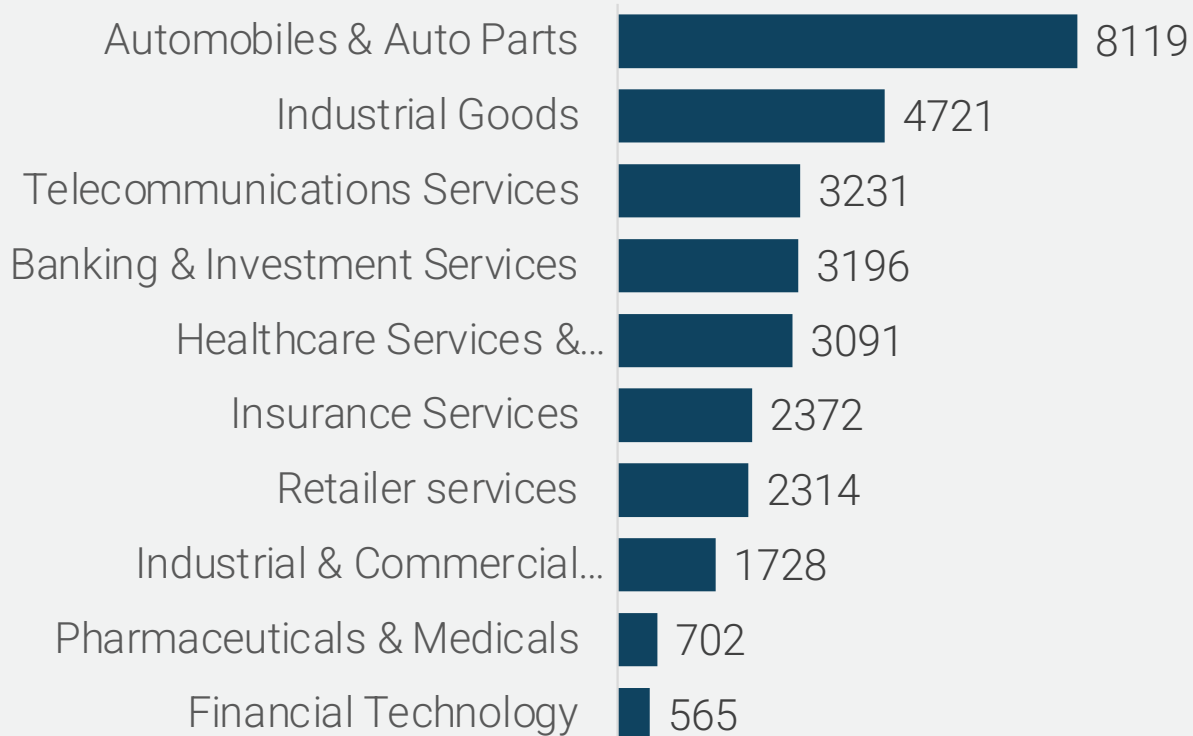
Number of export curbs by stated motive  
production or supply, 2018-2025



# Data: «Factor of Production» in the Real Economy

Emergent policy measure to ensure economy-wide data allocation

## Number of AI patents by sector of its holder



- Setting framework conditions
  - Property rights regimes
  - Secondary data usage rights
  - Dispute resolution
- Market making activities
  - Trading infrastructure
  - Trading of public data
  - Data accounting standards

# Thank you

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