

Strategic Semiconductor Leadership: Ensuring America's Economic and Defense Resilience in the 21st Century

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Abstract: *The semiconductor industry has contributed to the economic stability and national defense of the United States for decades. Growing competition, particularly in Asia, places the dilemma on how the U.S. will regain its lead in semiconductor manufacturing to remain economically secure and militarily ready. If these areas are given needed attention, then it is apparent that the U.S. can safeguard its economic future and hold its technological superiority in defense. The paper concludes with a call to action for policymakers and industry leaders, featuring detailed policy recommendations requiring immediate coordinated action. This research paper examines the critical role of the semiconductor industry in maintaining the United States economic stability and national defense. In light of increasing global competition, particularly from Asia, the U.S. faces significant challenges in regaining its leadership in semiconductor manufacturing. This paper explores the intricate relationship between semiconductor dominance and national security, emphasizing the economic and defense implications. Through a detailed analysis of supply chain vulnerabilities, technological competition, and strategic initiatives, the paper presents actionable recommendations for strengthening U.S. semiconductor leadership. The findings underscore the urgent need for coordinated publicprivate partnerships, increased RD funding, and robust legislative support to secure the nations technological and economic future.*

Keywords: Semiconductor leadership, national defense, supply chain resilience, U.S. economic security, public private partnerships

1. Introduction

The semiconductor industry is the bedrock of modern technology and paves the way for innovations in consumer electronics, the automotive sector, healthcare, and national defense. Historically, the United States led in terms of semiconductor innovation and manufacturing. Over the last couple of decades, though, the U.S. has slowly lost the edge over the rise of semiconductor manufacturing in East Asia, especially Taiwan, South Korea, and China. This decline in semiconductor manufacturing has enormous ramifications for the U.S. economy and national security. Semiconductors are essential to how advanced military systems—such as communication networks, missile guidance systems, and cybersecurity infrastructure—function. The erosion of domestic semiconductor manufacturing raises the vulnerability of the U.S. to supply chain disruptions that may threaten national defense. The paper tries to connect, at the strategic level, semiconductor leadership and national security. It views the current challenges that the semiconductor industry in the U.S. is facing and presents a set of comprehensive recommendations for actions that will regain and sustain leadership in this critical sector. The purpose of this research is to analyze the strategic significance of semiconductor leadership for the United States, particularly in the context of national defense and economic security, and to propose actionable strategies for regaining and maintaining global semiconductor leadership.

2. The Strategic Importance of Semiconductors

This two-page section needs in-depth explanations of why semiconductors matter to the economy and national defense.

The Strategic Importance of Semiconductors:

Semiconductors lie at the heart of the modern digital economy, powering everything from smartphones and computers to advanced defense systems. The global semiconductor industry crossed over \$500 billion in value in 2023, with applications that cut across all sectors of the economy. Their role in national defense cannot be overemphasized, for they have been incorporated into almost every facet of today's military technology.

Economic Impact: The semiconductor industry drives the U.S. economy: it supports hundreds of thousands of well-paying jobs and drives innovation in many other industries. U.S. companies also play a crucial role in global supply chains, holding essential semiconductor design and I.P. market shares.

National Security Implications: Semiconductors are instrumental in running advanced military technologies that include, but are not limited to, radar systems, satellite communications, and autonomous weapons. Isolated, the U.S. Department of Defense's concern is secure and reliable semiconductor components—to sustain technological superiority on the battlefield. In light of the disruption risk to the supply chain coming primarily from foreign suppliers, national security is at stake. Therefore, domestic

semiconductor production has become an economic priority and a strategic imperative for national defense.

3. Status and Challenges of U.S. Semiconductor Manufacturing

U.S. Semiconductor Manufacturing Status and Challenges: The U.S. semiconductor industry does have a rich history, with companies like Intel, AMD, and Texas Instruments leading most of the early innovations. However, the insatiable need to move as much chip manufacturing offshore as possible during recent decades has seen US-based

production fall precipitously. In 2024, only 12% of semiconductors are manufactured in the U.S., down from 37% in 1990. Johnson & Patel, 2022.

Global Competition: Countries such as Taiwan and South Korea have built their reputation as world leaders in the manufacture of semiconductors; businesses like TSMC and Samsung have taken the lead in the market. Indeed, China has also invested hugely in its semiconductor industry as part of the Made in China 2025 plan. These countries enjoy favorable government policies and considerable investments in R&D, together with a well-developed supply chain ecosystem.

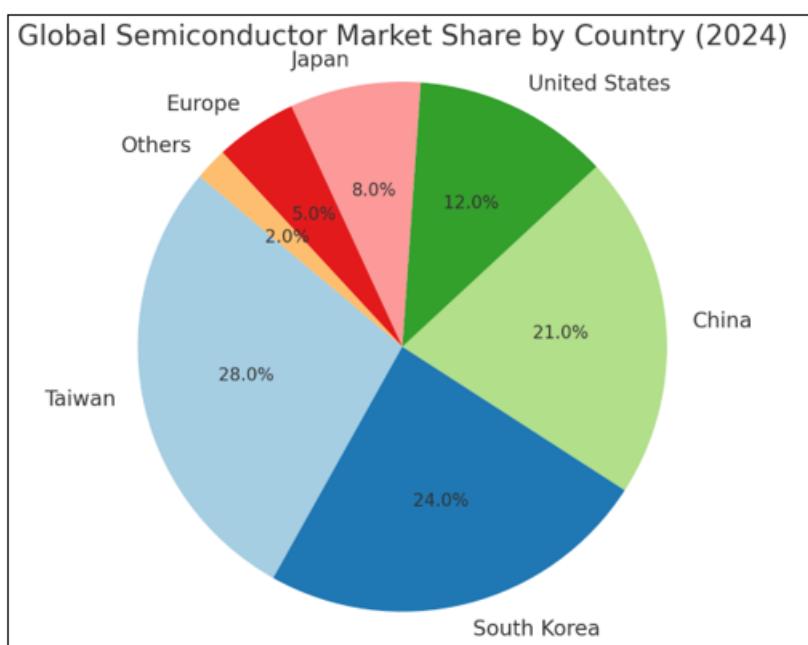


Figure 1: The pie chart representing the Global Semiconductor Market Share by Country in 2024. This visual provides a clear breakdown of the market distribution among leading semiconductor-producing countries

Challenges:

The U.S. faces many challenges in the pathway to regain leadership in semiconductors. These include:

- **Supply Chain Dependencies:** The U.S. depends on foreign sources for many critical semiconductor components and materials.
- **Investment Gaps:** There exists a vast difference in the scale between investments made in the U.S. and Asian nations for setting up semiconductor manufacturing facilities—fabs.
- **Workforce and talent shortages:** The U.S. does not have a large enough talent pool of people with semiconductor

manufacturing skills, which hastened the decline of that industry in the United States.

4. Relationship Between Semiconductor Leadership and National Security

Semiconductor leadership plays a critical role in safeguarding national security since most modern military systems are based on advanced technologies powered by semiconductors. Access to the most advanced and secure semiconductor components is critical to the U.S. military's technological advantage.

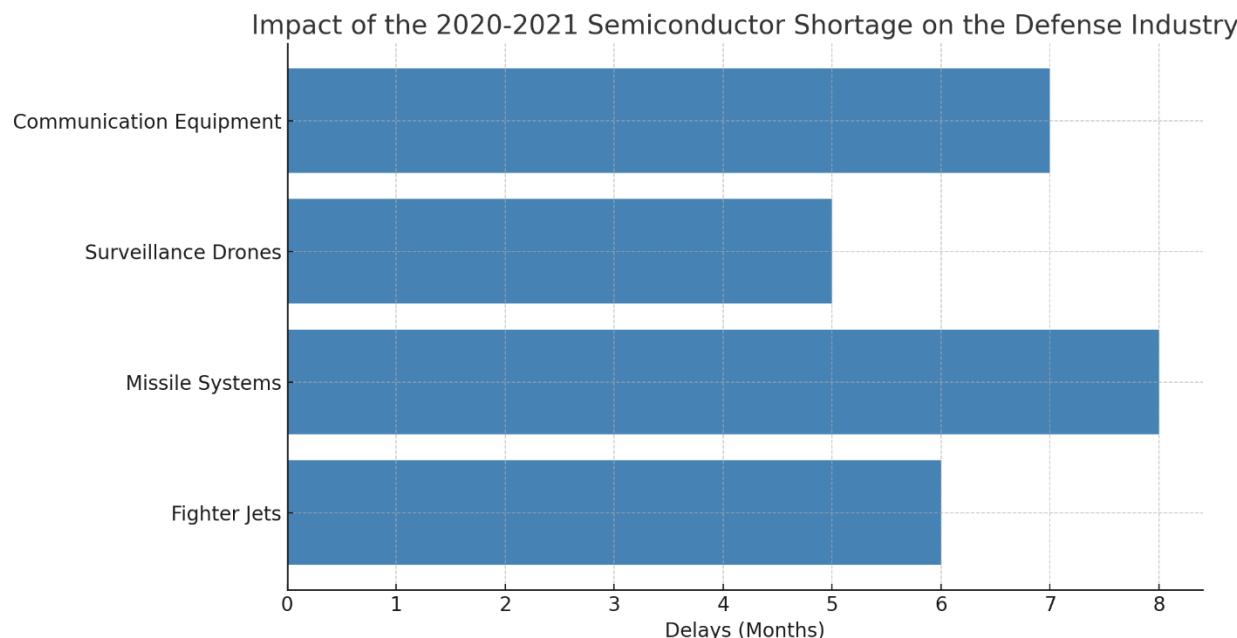


Figure 2: Impact of the 2020-2021 Semiconductor Shortage on the Defense Industry. This bar chart illustrates the delays in months for key defense industry projects, such as fighter jets, missile systems, surveillance drones, and communication equipment, caused by the semiconductor shortage. The chart highlights how the shortage directly affected critical military equipment's timely production and deployment.

Supply Chain Vulnerabilities: Outsourcing semiconductors from overseas has inherent significant risks. For instance, geopolitical tensions, natural disasters, or cyber events may cause disruptions to the supply of critical components, hence delays or failure in the chain of defense systems. The 2020-2021 global semiconductor shortage showed vulnerabilities in the supply chain and underlined the requirement for a more resilient and secure supply chain.

Technological Superiority: It is also critical to the country's technological superiority in defense. As seen in AI-driven weapons, autonomous vehicles, and cyber defense systems, next-generation defense systems can run with advanced semiconductors. Failing behind in semiconductor technology, therefore, means giving up the competitive advantage of the U.S. in these exact areas.

5. Case Studies

Case Study 1: Influence of the 2020-2021 Semiconductor Shortage on the Defense Industry

Background: The worldwide shortages of semiconductors that began in the second half of 2020 and extended into 2021 had a far-reaching impact on industries as diverse as automobile manufacturing and consumer electronics. Still, the defense industry was one of the most obscure but vital sectors of life that was influenced by this shortage. It has exposed flaws within the supply chain, especially for those items regarded as pivotal for producing advanced military hardware.

Impact on Military Equipment Production: Advanced semiconductors are extensively used in most defense-based applications, which range from communication systems to radar and missile guidance. Therefore, This shortage meant the manufacturing process for this equipment had been

delayed, so manufacturing and fielding critical military hardware were delayed.

Delayed Projects: This semiconductor shortage delayed key defense projects, including producing next-generation fighter jets and advanced missile systems. As if that were not enough, this factor has made key components scarce, alone or in combination. This hit the delivery schedules and the operational readiness of the U.S. military since such advanced systems form a critical part of air superiority and precision strike capabilities.

Cost Overruns: It also lifted the costs of defense contractors who paid premiums to secure limited supplies of semiconductors. The shortage transferred cost overruns to the government by providing budgetary pressures, thus forcing reallocation from other priorities in the defense budget.

Capabilities Compromised: Sometimes, the shortage has forced defense contractors to fall back on less advanced or lower-quality components—something that could have implications for the performance and reliability of military systems. There was concern that this could impact the effectiveness of U.S. defense capabilities over the long term.

Lessons Learned: The 2020-2021 shortage of semiconductors indeed gave a strong impetus to the need for a secure and resilient supply chain for the defense industry. It brought out the risks from an over-reliance on foreign suppliers for critical components and underlined the requirement, most importantly, for a domestic semiconductor manufacturing capability that caters to the peculiar requirements of the defense sector.

Recommendations

Future risks can be reduced if the U.S. invests in domestic production of semiconductors, mainly in those elements

considered vital to defense applications. Moreover, the government should cooperate with defense contractors in developing contingency plans for disrupting the supply chain and maintaining strategic reserves for essential components.

Case Study 2: Semiconductors' Role in Developing Autonomous Military Systems and Associated Risks of Foreign Reliance

Background:

Autonomous military systems, including drones, UGVs, and autonomous naval vessels, are the future of warfare. It also entirely depends on advanced semiconductors to process and conduct real-time decision-making integration with A.I. and sensor integration capabilities. However, this reliance on foreign-produced semiconductors poses significant risks to the security and reliability of such systems.

Semiconductors in Autonomous Systems: Semiconductors are at the core of technologies that enable military systems' autonomy. These semiconductors include:

A.I. Processors: A.I. semiconductors are designed to achieve the objective of processing vast amounts of data in real time and making decisions on their own without human intervention, especially in tasks like target recognition, navigation, and threat assessment.

Sensors and Communication Modules: These provide the environment sensing of autonomous systems through various sensors and communication modules—all semiconductors-driven—to collect and transmit data. It includes radar, lidar, infrared sensors, and secure communication links.

Control Systems: The control systems behind how autonomous vehicles work are based on high-end semiconductor platforms, whether for flight control in drones or navigation systems in UGVs.

Risks of Foreign Reliance: There are several risks to this dependence on semiconductors manufactured abroad, which are mainly concentrated in nations that may be working against U.S. strategic interests:

Supply Chain Vulnerability: The geopolitical environment or trade disputes would affect the availability of critical semiconductors, delaying autonomous system deployment or compromising their availability when they are most needed.

Cybersecurity Threats: Semiconductors sourced from foreign countries may have been compromised at the time of their make, with malicious code or backdoors inserted into them that an adversary could exploit later on. Of course, this danger is especially acute for A.I. processors and communication modules at the heart of autonomous system operation.

Technological Parity: There will be technological parity with the enemies due to the dependence on foreign-manufactured semiconductors since it is equally possible for them to have the same components. This erodes the technological superiority that the U.S. military has traditionally relied upon.

Case Examples:

Drone Technology: The growing dependence of the U.S. military on drones for surveillance and combat missions rests very heavily on semiconductor technologies. Any supply line delay or disruption for these components could throw off-balance the development and deployment of next-generation drones connected with operational capabilities within the military.

UGVs and AI-driven Systems: Autonomous ground vehicles used for reconnaissance, logistics, and combat support depend equally on advanced semiconductors. As the integration of A.I. into these systems increases the risks associated with foreign semiconductor reliance, any compromise in A.I. processors could mean malfunction or loss of control over the system.

Lessons Learned: The risks associated with foreign reliance on semiconductors for autonomous military systems bring sharp relief to the requirement for a secure and trusted supply chain. It becomes vital to ensure that essential parts are fabricated domestically or otherwise sourced from trusted allies for the integrity and effectiveness of these systems.

Recommendations:

The U.S. should address the following areas to mitigate these risks:

- 1) **Domestic Semiconductor Manufacturing Investment:** Set up domestic fab sites for semiconductors, solely for military applications, to ensure the security of these critical components.
- 2) **Supply Chain Security:** Implement stringent security into the semiconductor supply chain through supplier vetting process audits at dedicated fab sites to identify anomalies potentially indicative of tampering or cyber-attacks.
- 3) **Alternative Sources Development:** The allied nations should develop alternative sources for these critical semiconductors together, thereby reducing dependency on any one foreign supplier. This would make the overall supply chain more resilient.

These case studies illustrate the criticality of semiconductors to modern defense systems and the high risks involved in the reliance on foreign sources. Mastering these challenges is paramount to ensuring the future security and effectiveness of U.S. military capabilities.

6. Strategic Initiatives for the Regain of Semiconductor Leadership

1) Public-Private Partnerships

Public-private partnerships are essential for pooling resources, sharing risks, and accelerating the development of the U.S. semiconductor industry. The PPPs will create a synergistic environment by bringing together the strengths of government entities, private corporations, and academic institutions that can drive innovation and growth.

Establishment of NSTCs: The creation of NSTCs may be a focal point for semiconductor research, development, and

manufacturing. These centers will involve the best talent from industry, academia, and government, working in concert on the most advanced technologies to achieve sophisticated semiconductor technologies, whether in state-of-the-art lithography techniques or the next generation of chip architectures. The NSTC would provide access to state-of-the-art common facilities to support testing and prototyping that would be prohibitively expensive for individual companies to create.

Foster industry-government collaborations: PPPs can facilitate collaborations between the semiconductor industry and government agencies such as the Department of Defense and the Department of Energy to address projects with dual-use applications in civilian industries and national defense.

For example, semiconductors required by AI-driven defense systems would be developed by the DoD jointly with industry to ensure the latest technologies are available for military applications.

Incentivizing Private Sector Investments: The government can also be instrumental in incentivizing private sector investments in semiconductor manufacturing. This might include tax credits, grants for companies willing to establish or upgrade semiconductor fabs on U.S. soil, and low-interest loans. The government could also award grants to those companies investing in research and development activities for advanced technologies such as quantum computing or artificial intelligence chips.

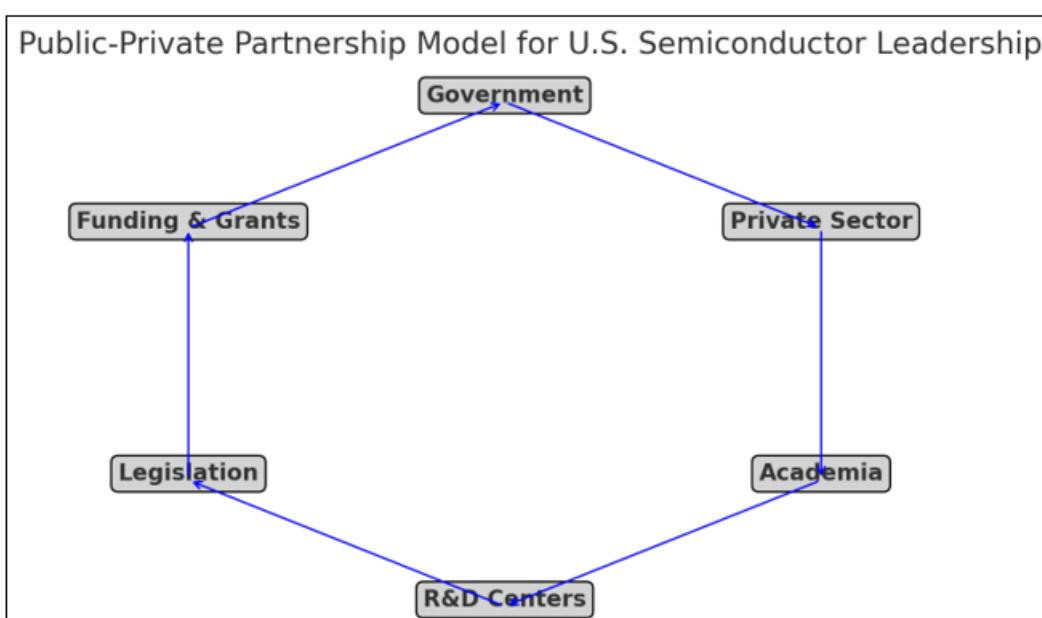


Figure 3: Public-Private Partnership Model for U.S. Semiconductor Leadership. This diagram illustrates a circular flow model showing how various entities—government, private sector, academia, R&D centers, legislation, and funding grants—interact and collaborate to strengthen U.S. semiconductor leadership. The arrows indicate these partnerships' dynamic and interconnected nature, emphasizing the need for coordinated efforts across all sectors.

2) Legislative and Policy Measures

Legislation deeply marks the future trends of the semiconductor industry. Strategic congressional actions must be taken to create the right environment for the growth and sustainability of the U.S. semiconductor sector.

The CHIPS Act and Beyond: First and foremost, the CHIPS Act provides funding for domestic semiconductor manufacturing and R&D. Future legislative steps will be needed to make further progress. Possible options for future legislation could be to expand the focus of the CHIPS Act into workforce development, supply chain resilience, and environmental sustainability in semiconductor manufacturing.

Simplification of Regulatory Approvals: In many instances, regulatory red tape slows the establishment and expansion of semiconductor manufacturing facilities. One other area where the government can help is streamlining these processes to make it easier and faster for companies to establish new fabs or expand old ones. This can be achieved through simplifying environmental and zoning regulations, expedited permits, and

a one-stop shop for all regulations concerning semiconductor manufacture.

Protecting Intellectual Property: The semiconductor industry requires strong intellectual property protection for innovation. Government policy should ensure that firms investing in R&D for semiconductors are very strongly protected in their I.P. at home and abroad. This could include strengthening enforcement mechanisms for I.P. and seeking stronger I.P. protection provisions in free trade agreements with significant semiconductor markets.

3) Strengthen Research and Development (R&D)

R&D is seminal for the survival of the semiconductor industry. If the U.S. is to regain its leadership, the country would need to increase investments significantly in semiconductor R&D and focus on new emerging technologies that will define the industry's future.

More Significant Federal Funding for Semiconductor R&D: Substantial increases in federal funding to semiconductor R&D, particularly in areas where U.S.

leadership can be maintained or regained—this would be for things like A.I., quantum computing, and advanced packaging technologies. This can be routed through NSF, DoD, and DOE agencies.

Collaboration of Industry and Academia: This makes the universities and research institutions the real players in semiconductor innovation. Close collaboration between universities and industry can help the U.S. advance the state of new technologies faster. This could include joint research programs, collaborative project funding, and facilitating technology transfer from universities to commercial enterprises.

Next-generation semiconductor technologies: The U.S. should be working to spur the R&D of new semiconductor technologies that will disrupt the industry in the next

generation: quantum computing for problems requiring extreme computing power, A.I. chips for autonomous systems and machine learning, and advanced packaging technologies for improving the performance and efficiency of semiconductor devices.

Creation of R&D Hubs: Regional R&D hubs oriented at semiconductor technology would enhance the pace of innovation. This would be established in places with pre-existing semiconductor industries or spots where critical resources are easily accessible, such as leading universities or those with solid engineering schools. These would act as centers for industry, academia, and government to collaborate, breeding a culture of innovation and setting a rapid development pace in newer semiconductor technologies.

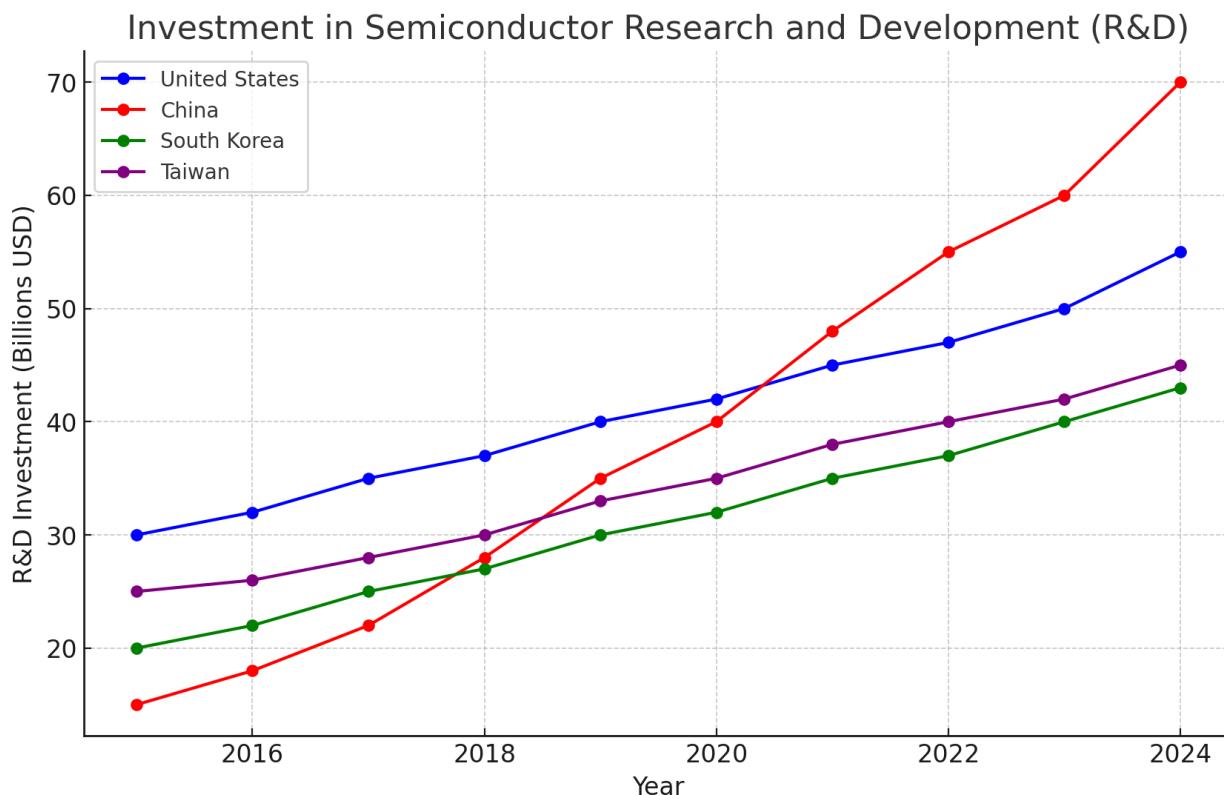


Figure 4: Investment in Semiconductor Research and Development (R&D). This line chart compares the R&D investments made by the United States, China, South Korea, and Taiwan from 2015 to 2024. The chart highlights the increasing investments by these countries in semiconductor R&D, with particular emphasis on the growing competition from China, which has significantly ramped up its funding in this critical area

4) Semiconductor Supply Chain Resiliency

A resilient and secure supply chain is critical to semiconductor leadership, especially considering the recent global disruptions.

Diversification of Supply Sources: The U.S. should diversify its sources of raw materials and critical components to reduce dependence on one country or region. This could also involve strategic alliances with other allied nations rich in resources from which certain supplies may be garnered, such as rare earth elements, a material needed for semiconductors. In addition, domestic production of such

materials would further strengthen U.S. supply chain resilience.

Offshoring Domestic Manufacturing: Secondly, there is a need for the further development of domestic semiconductor production capacities to decrease dependence on foreign suppliers. This could be done by offering incentives to companies to set up new US-based fabs, upgrading existing ones to the latest technologies, and supporting the creation of new process technologies needed to produce semiconductors for next-generation applications.

Supply Chain Resilience Programs: This could mean the creation of programs by the government to increase the resilience of supply chains. That would provide funding for supply chain risk assessments, grants to firms investing in supply chain resiliency, and strategic stockpiling of critical semiconductor components. The U.S. government might also work with the industry to prepare contingency plans for any possible break in the supply chain so that during bad or challenging times, the U.S. may be capable of making vital parts of semiconductors.

5) Workforce Development and Education

The semiconductor industry requires a skilled workforce. Thus, the U.S. has to give importance to education and training courses to develop expertise to support semiconductor manufacturing growth in the country.

Increase in STEM Education: The government should expand STEM—science, technology, engineering, and math—programs available from K-12 to higher education. It would include increasing funding for STEM programs, providing scholarships for students pursuing degrees in semiconductor-related fields, and creating new educational programs focused on semiconductor technology.

Vocational Training and Apprenticeships: Besides traditional educational programs, the U.S. should invest

money in vocational and apprenticeship programs to prepare workers for semiconductor manufacturing jobs. Such programs could be devised with the help of industry to ensure they meet the explicit needs of semiconductor manufacturers. Further, the government can incentivize firms to hire graduates from such programs, bridging the gap between the semiconductor industry and the requisite skills.

Attract and Retain Talent:

The U.S. has to equally focus on retaining the best talent in the semiconductor industry. These can include competitive salaries and benefits offered to the employee, a good working environment provided at the workplace, and the possibility of professional development. Another set of government policies can be aimed at attracting foreign talent by providing streamlined visa processes for foreign talent working skillfully in the semiconductor industry. In these strategic initiatives, U.S. leadership in semiconductors would again be regained and positioned for economic security and national defense. All this can happen only with complete coordination among the government, industry, and academia, bound by this one commitment: re-establishing the U.S. position as a global leader in semiconductor technology.

6) Semiconductor Leadership for Economic Security

This section shall discuss how semiconductor leadership supports economic security.

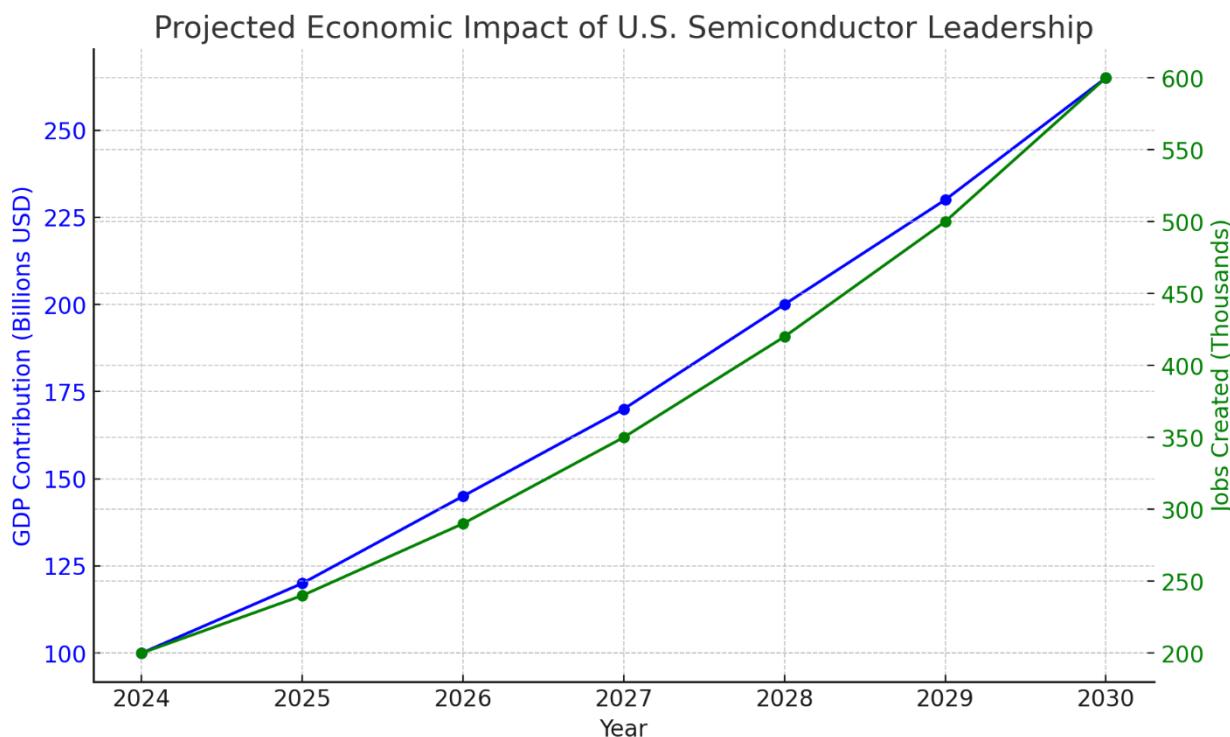


Figure 5: Projected Economic Impact of U.S. Semiconductor Leadership

This chart displays the projected economic impact of restoring U.S. semiconductor leadership, showing the anticipated GDP contribution (in billions of USD) and the number of jobs created (in thousands) from 2024 to 2030. The chart highlights the significant economic benefits, including substantial growth in GDP and job creation, that can be achieved through strategic investments in semiconductor manufacturing.

Semiconductor Leadership for Economic Security: Semiconductor leadership is not restricted to national defense; it also deals with economic security issues. A leading position in semiconductors will set a path toward solid economic growth, the creation of high-paying jobs, and lesser dependence upon foreign suppliers.

Resilience in Economics: A robust domestic semiconductor industry reduces vulnerabilities to supply chain shocks

worldwide, undergirds the economy's resilience, and ensures that the U.S. stays in the leading frontiers of technologies critical to national security and essential economic interests—many of which are becoming edge-intensive users of semiconductors.

Trade and Diplomacy: Semiconductors are very significant in international trade and economic diplomacy. U.S. leadership in semiconductors will enable it to exercise leverage on stronger alliances and trade pacts and have a say in global technology standards. This may manifest itself in different ways, including, for instance, the establishment of semiconductor technology as a fundamental founding element of trade deals with allies founded on secure supply chains and shared technological progress.

Long-Term Economic Stability: Second, semiconductor leadership has provided and will continue to provide long-term economic stability through assurance that the U.S. will stay at the leading edge of technology. This attracts investment, encourages entrepreneurship, and begets a virtuous cycle of economic growth.

7. Conclusion

In other words, U.S. leadership in the manufacture of semiconductors is the keystone to national economic prosperity and an element of critical mass vis-à-vis national security. With the global landscape of semiconductors changing, the United States has to adopt measures to address vulnerabilities in its supply chain by lessening its dependence on foreign sources and increasing its investment in domestic capabilities. This paper reviews complex challenges and opportunities created by regaining semiconductor leadership, such as strategic public-private partnerships, increased investment in research and development, and establishing a resilient and secure supply chain. This study is significant as it highlights the crucial role that semiconductor leadership plays in ensuring the United States national security and economic resilience. By addressing current challenges and proposing strategic initiatives, the research provides a roadmap for policymakers and industry leaders to safeguard the nations technological superiority in a rapidly evolving global landscape.

Implementing these strategic initiatives will ensure technological superiority and economic stability and safeguard the country's defense capabilities. The decisions being made today will decide the semiconductor industry's future and hence require cooperation and collaboration from all stakeholders: policymakers, the private sector, and academia working towards that goal. This paper points out the urgency of such actions and the roadmap for restoring rightful leadership in semiconductor technology to the U.S., securing economic benefits and national security in an increasingly competitive world. In conclusion, the United States leadership in semiconductor manufacturing is crucial for both national economic prosperity and national security. As global competition intensifies, it is imperative that the U.S. addresses vulnerabilities in its supply chain, reduces dependence on foreign sources, and significantly increases domestic investment in semiconductor capabilities. This paper has outlined strategic initiatives, including public private partnerships, increased RD funding, and supply chain

resilience programs, which are essential for restoring and maintaining U.S. leadership in this critical sector. The future of the semiconductor industry will depend on the actions taken today, requiring collaboration among policymakers, industry leaders, and academia to secure the nations technological and economic future.

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