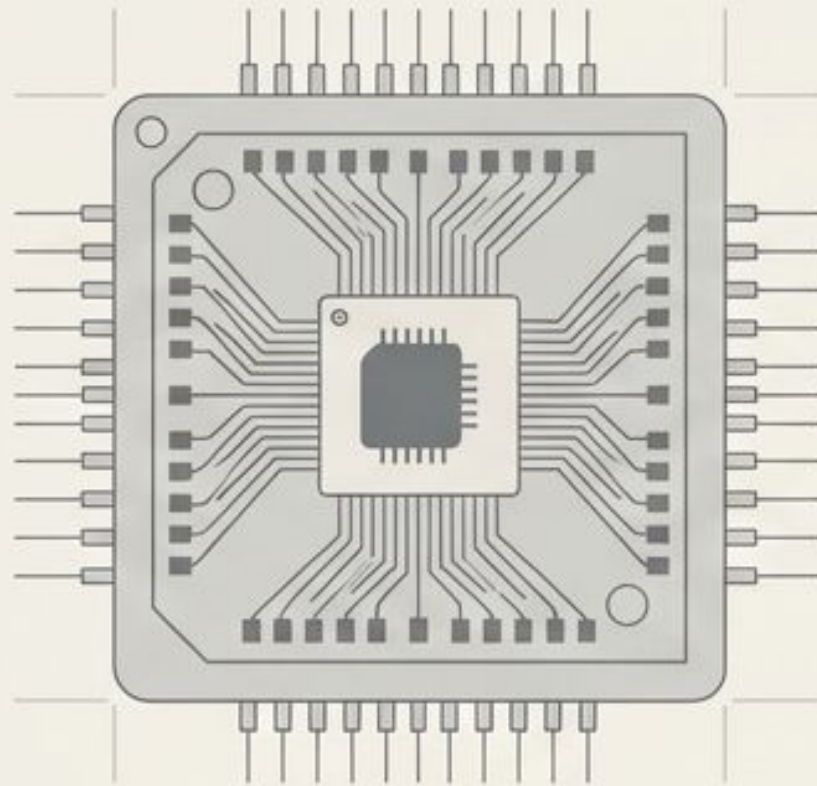


May 29 – June 5, 2026 — The Shift to "Ultimate Infrastructure' Shown by Computex 2026

Chips have moved from mere components to infrastructure betting on national sovereignty and corporate survival in the AI era. We decode the "5 seismic shifts" that occurred this week.

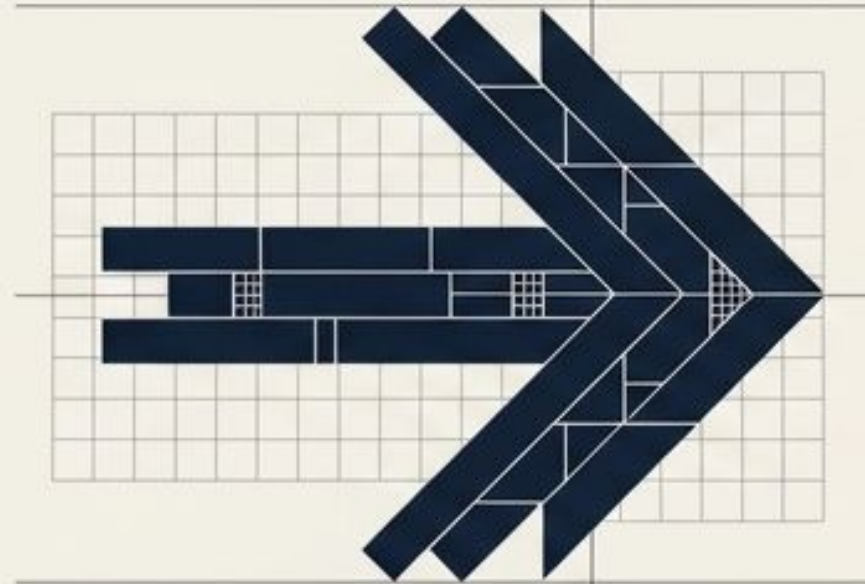


Why is semiconductor news the 'blueprint of the future' now?



Old Paradigm (~2025):

A 'mere electronic component' providing computational power.

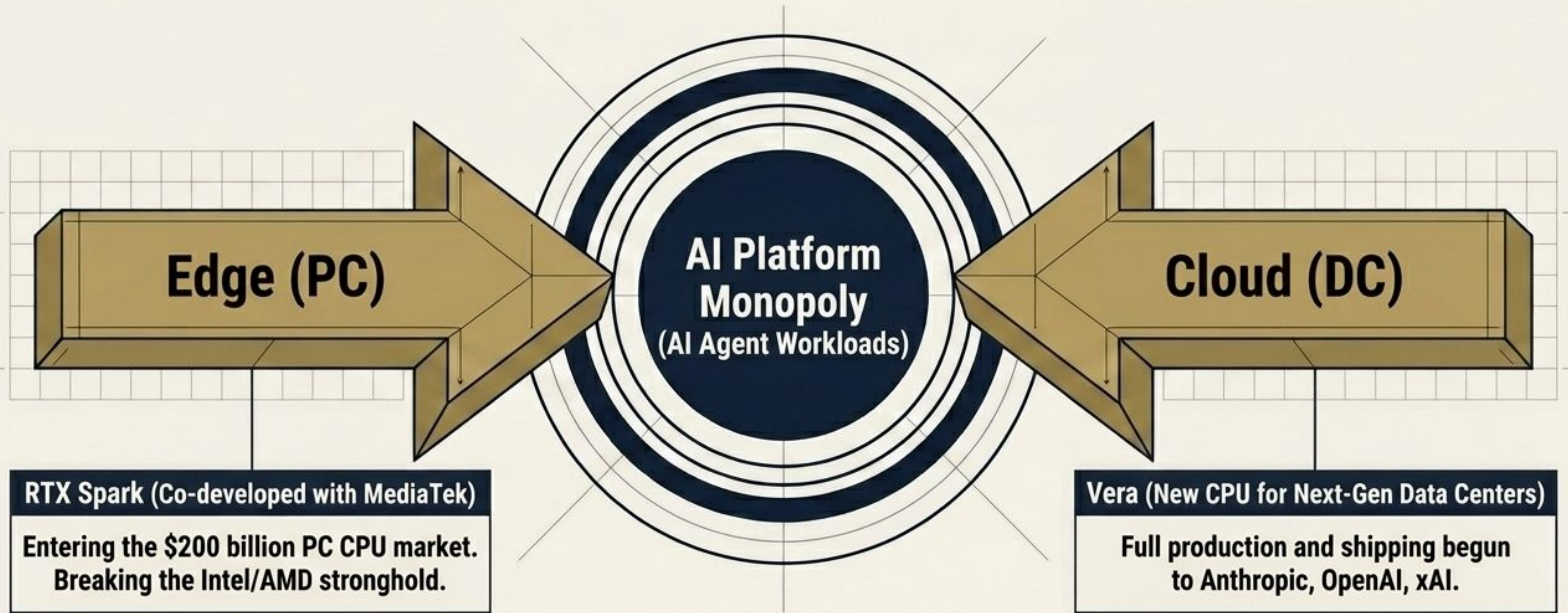


New Paradigm (2026~):

The 'ultimate moat' and 'infrastructure' controlling the fate of nations.

Currently, AI has dramatically lowered the barriers to entry for software development, compressing profit margins. The monopoly of inimitable 'physical computational resources (hardware)' is returning as the source of next-generation competitiveness.

1. NVIDIA's Total War: 'Dual Dominance' of PC & Cloud



Redrawing the computing power map by pincer-attacking the standard platform of the general-purpose AI era from both the 'Edge' and 'Cloud' poles.

2. The Rapid Pursuit of Custom Silicon: The End of the “General-Purpose GPU Myth”?

General-Purpose GPU (NVIDIA, etc.)	Custom ASIC (Hyperscaler In-house Development)
<p data-bbox="346 664 1459 739">2026 Shipment Growth Forecast (IDC)</p> <p data-bbox="469 840 1346 1108">16.1%</p> <ul data-bbox="219 1226 1579 1380" style="list-style-type: none">• Characteristics: High versatility, but massive power consumption in specific applications	<p data-bbox="1852 664 2965 739">2026 Shipment Growth Forecast (IDC)</p> <p data-bbox="1919 840 2908 1108">44.6%</p> <ul data-bbox="1759 1226 2978 1380" style="list-style-type: none">• Representative Examples: Google TPU, Meta MTIA, AWS Trainium3 (3nm)

The deciding factor is “power efficiency.” Anthropic plans to deploy AWS Trainium3 at a 1GW (gigawatt) scale by the end of 2026. The shift to in-house development is not for cost reduction, but a survival strategy to break through physical power bottlenecks.

3. EU Chips Act 2.0 : Europe's Quest for 'Digital Sovereignty'

“Ensure No One Holds the Kill Switch”



Policy Trend / **Announced on June 3rd**

Significant **evolution** from the old law (2023).
Reducing reliance on US technology.
Massive investment in building "**Europe's Own Foundry**" for advanced AI silicon.

Insight

Semiconductors have shifted from an economic issue to the 'core of national security.'
A defense measure to prevent other countries from holding the power of life and death over one's own digital society.

4. Nikon's Price Disruption: Challenging ASML's Monopoly

ASML's Monopoly (10+ Years):
Advanced Process Lithography Market
via EUV (Extreme Ultraviolet)
Exposure Systems

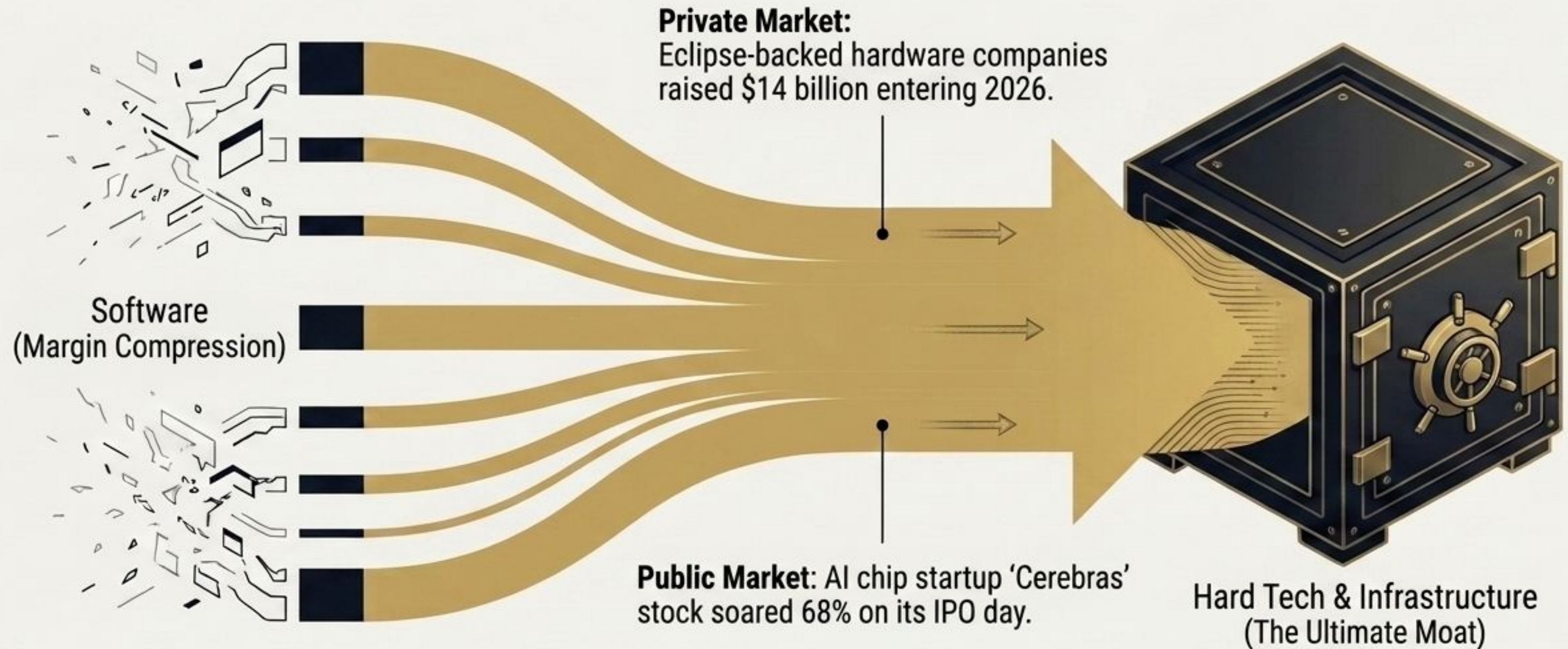
**Nikon's
Undercut
Strategy**

Offensive to Reclaim
US Chipmakers with
Significantly Lower Price
Points, Leveraging In-House
Manufacturing Strengths

Industry Impact:

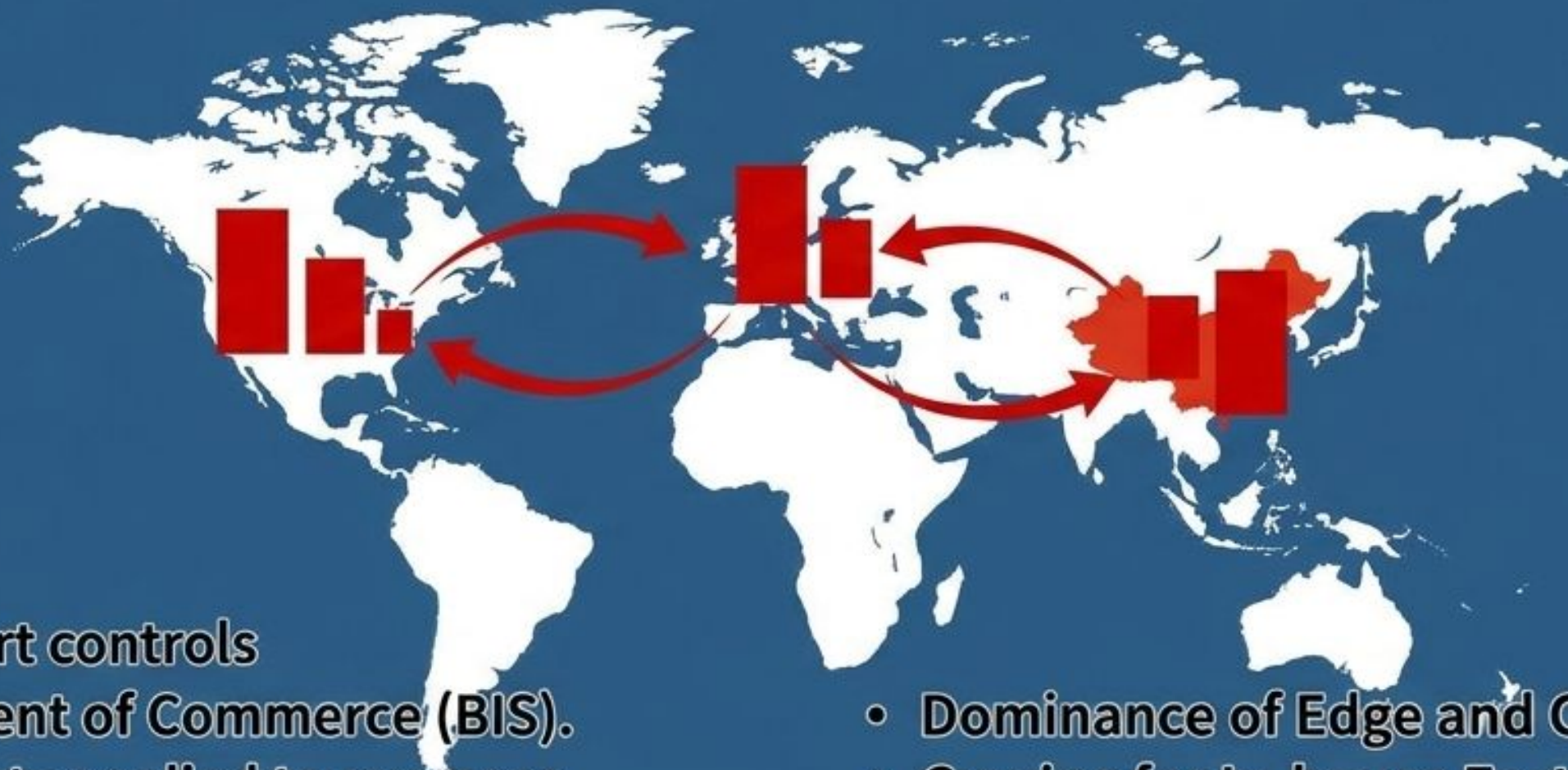
A Wedge Against Skyrocketing
Wafer Prices (Manufacturing
Costs).
Lower Manufacturing Costs
Could Re-accelerate the Industry-
Wide Innovation Speed.

5. The Great Migration of Investment Money: A Return to 'Hard Tech'



Paradigm Shift: As AI proliferation makes software differentiation difficult, investors are redefining physical computational resources (chips and infrastructure) as 'the ultimate moat' and are executing a dramatic shift in capital.

Conclusion: Accelerating “Semiconductor Nationalism”



Trigger (June 1st):
Strengthened export controls
by the US Department of Commerce (BIS).
License requirements applied to overseas
subsidiaries of Chinese companies, effectively
blocking loopholes via third countries.

An era where technology containment transcends
national borders and extends to corporate capital
lineage.

- Dominance of Edge and Cloud (NVIDIA)
 - Craving for In-house Factories (EU)
 - Return of Investment to Hardware (Market)
- All events indicate a historical turning point of
“Division and Reorganization by
Semiconductors.”

Data Sources & References (English)

1. Computex 2026 Presentation Materials

(NVIDIA / MediaTek Keynotes and Releases)

6. NVIDIA Corporation

(New Data Center CPU "Vera" Production and Shipment Related Materials)

2. IDC (International Data Corporation)

(2026 Custom ASIC / General Purpose GPU Shipment Growth Forecast Data)

7. Amazon Web Services (AWS) / Anthropic

(Trainium3 Introduction and 1GW Scale Data Center Plan)

3. CNBC

(EU Chips Act 2.0 and "Kill Switch" Related Reports)

8. Eclipse

(FY2026 Hardware Enterprise Fund Fundraising Data - \$14 Billion Scale)

4. European Commission

(June 3 Release: European Semiconductor Act / EU Chips Act 2.0 Policy Documents)

9. Cerebras Systems

(Initial Public Offering [IPO] and First Day Market Trading Data)

5. Bureau of Industry and Security (BIS), U.S. Department of Commerce

(June 1 Release: Export Control Strengthening / License Requirements)

10. Stock Market Data

(June 1 Intel, AMD, Qualcomm Stock Trends / Nikon Lithography Trends)