

Macro Roundup Article

Headline: China Tells Telecom Carriers to Phase Out Foreign Chips in Blow to Intel, AMD

Article

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Author(s)	Liza Lin
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Tweet: Sino-American decoupling is accelerating: China has moved up its deadline to get US-made chips out of the PRC's telecom system to 2027.

Summary: The deadline given by China's Ministry of Industry and Information Technology aims to accelerate efforts by Beijing to halt the use of such core chips in its telecom infrastructure. The regulator ordered state-owned mobile operators to inspect their networks for the prevalence of non-Chinese semiconductors and draft timelines to replace them. In the past, efforts to get the industry to wean itself off foreign semiconductors have been hindered by the lack of good domestically made chips. Chinese telecom carriers' procurements show they are switching more to domestic alternatives, a move made possible in part because local chips' quality has improved and their performance has become more stable. Such an effort will hit Intel and AMD the hardest. The two chip makers have in recent years provided the bulk of the core processors used in networking equipment in China and the world. Related: China Blocks Use of Intel and AMD Chips in Government Computers and China Intensifies Push to 'Delete America' From Its Technology and The US-China Chip War is Escalating

Primary Topic: Trade (not deficits)

Topics: China, Fiscal Policy, GDP, News article, Regulation, Trade (not deficits)

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