Economic & Geopolitical Uncertainties, Trade Tensions and Export Controls
Agenda

8:00 – Introduction - Heidi Hoffman, SEMI
8:02 – Opening Remarks - Ajit Manocha, SEMI
8:10 – Making Sense of the COVID-19 and Economic Crises for the US and the World – Ambassador Nicholas Burns, Harvard University, Kennedy School of Government
8:30 – US-China Trade Tensions – Clete Willems, Partner, Akin Gump
8:40 – US Export Control Regulations – Peter Lichtenbaum, Partner, Covington & Burling LLP
8:50 – Roundtable & Q&A – moderated by Joe Pasetti, SEMI
9:10 – Closing Remarks - Ajit Manocha
- Expanding scope and programs at SEMI to represent the broader electronics manufacturing and design supply chain
- More than 35 years in the semiconductor industry
- Former CEO of GLOBALFOUNDRIES
- Held senior operations leadership roles at Philips Semiconductors and Spansion
- Granted patents on semiconductor manufacturing processes at AT&T Bell Labs
- 2020 inductee into Silicon Valley Engineering Hall of Fame
Industry & SEMI Update

• Industry update
  • Cautious optimism – challenges remain; positive signs
  • COVID-19, geopolitical tensions and economic uncertainty
  • Q2 World Fab Forecast – Record spending $67.7 billion for 2021
  • SEMICON China kicks off new normal for industry gatherings
Industry & SEMI Update

- SEMI response
  - **Reopen with care** – Coronavirus Resources website and blog content
  - **Global Advocacy** efforts ongoing
    - Supporting **essential business travel**
    - Opposing unilateral export controls; mitigating trade tensions

www.semi.org/COVID-19
Microelectronics More Optimistic for Recovery in Next 12 Months

Microelectronics Industry
- Very optimistic: 25%
- Optimistic: 25%
- Not optimistic: 50%

Global Economy
- Optimistic: 42%
- Not optimistic: 15%
- Very optimistic: 15%

n = 319
Continuing hiring as planned: 55%
Eliminated or frozen some hiring: 32%
Frozen all hiring: 13%

Hiring Remains Strong for Microelectronics Industry

n = 298
Key Elements of Business Continuity for the Future

- Resilient telecommunications infrastructure to support employees working remotely
- Manufacturing/production recovery strategies and tactics
- Diversified supply chain in multiple geographic regions
- Increased and more frequent company communications
- More crisis training for management and employees
- 90+ days of spare parts and materials
- Multiple manufacturing locations
- Moving essential company data to the cloud

n = 288
Making Sense of the COVID-19 and Economic Crises for the U.S. and the World

Ambassador Nicholas Burns
Harvard University
Kennedy School of Government
U.S. - China Trade Tensions

Clete Willems
Akin Gump
U.S. Export Control Regulations

Peter Lichtenbaum
Covington & Burling

AGENDA

I. Overall Policy Trends and Influences
II. Response to "Made in China 2025": Emerging & Foundational Technology
III. Response to Civil-Military Fusion: MEU, CIV, APR, Entity Listing
IV. Response to Huawei/5G: Entity Listing
V. Response to Human Rights: Entity Listing
VI. Key Take-Aways
Agenda

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Q&A
Closing Remarks

Thank you for joining the webinar
Closing Remarks

- Key takeaways from (and thanks to):
  - Amb. Nicholas Burns – Perspective on COVID-19 and economic recovery
  - Clete Willems – Insights on US-China tensions
  - Peter Lichtenbaum – In-depth overview of US export controls
- SEMI is working to help you reopen with care:
  - Join us for the virtual exhibition, networking and new business opportunities at SEMICON West starting July 20
  - And at SEMICON SEA starting August 11