

Welcome Remarks



Laith Altimime
SEMI Europe President



**SEMICON[®]
EUROPA**

Strategic Partnership

**SEMICON[®]
EUROPA**

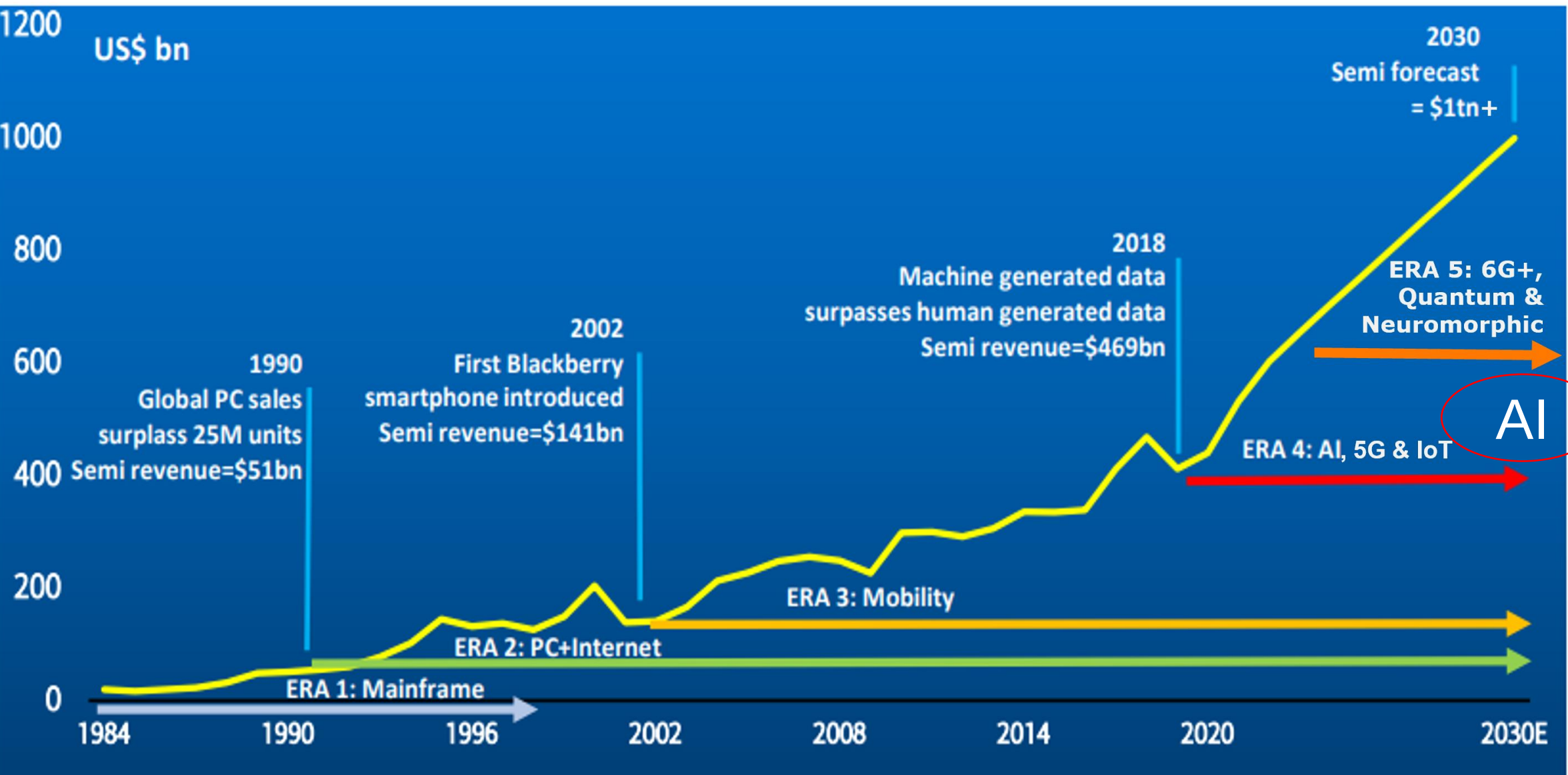


Messe München



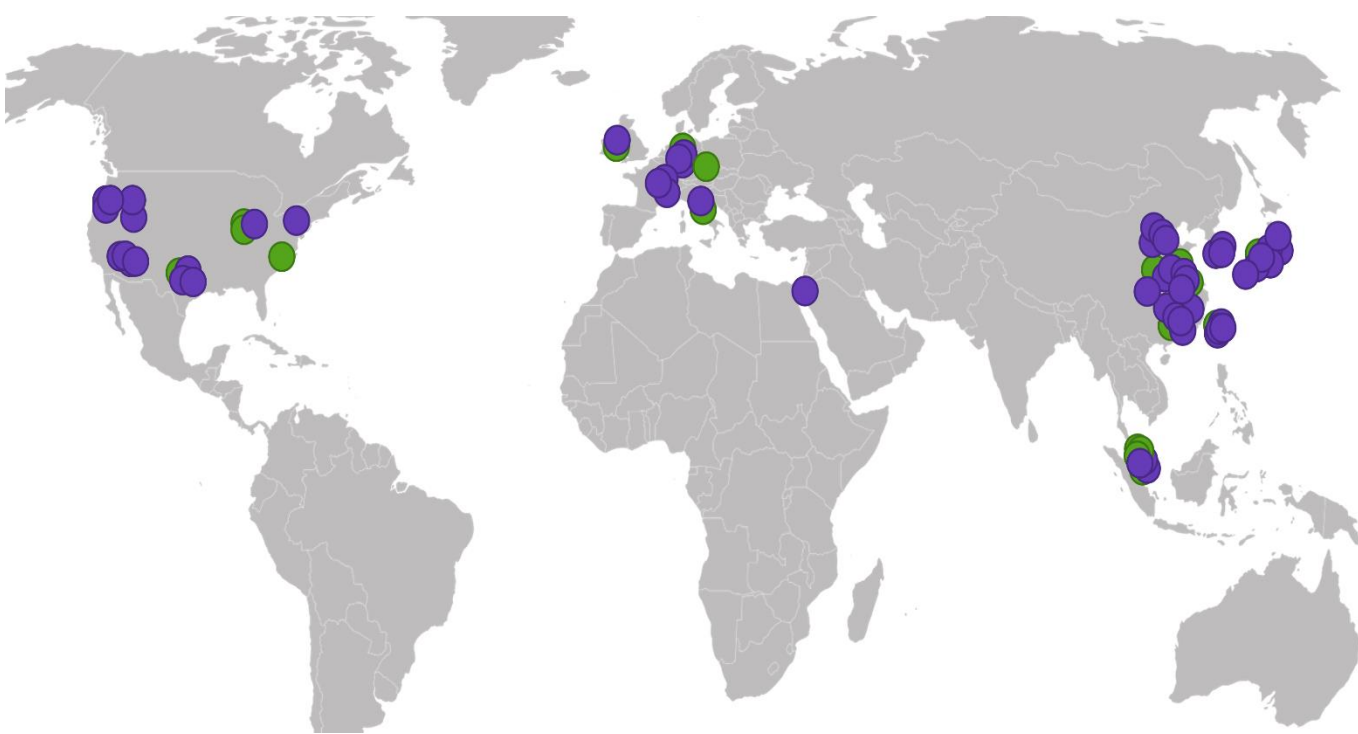


Semiconductor Industry on a Path to \$1T Made Possible by Unprecedented Fab Capacity Expansion



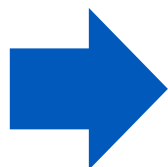
Sources: Bank of America, SEMI

Region	300mm	200mm
Americas	14	4
China	25	5
Europe/Mideast	9	4
Japan	8	1
Korea	3	-
SE Asia	3	4
Taiwan	13	1
Total:	75	19



Source: SEMI World Fab Forecast 3Q23 (Sept. 2023)

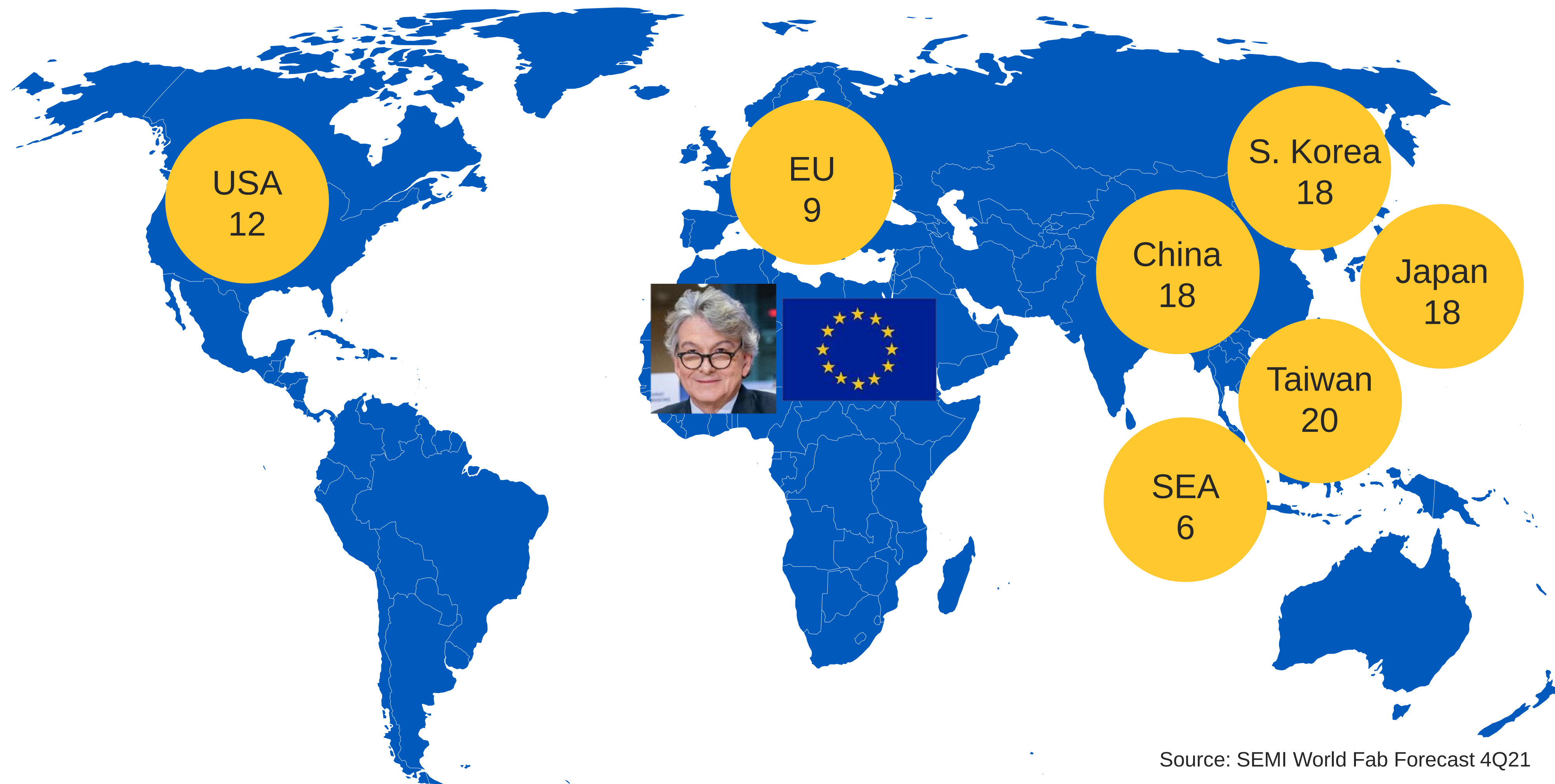
A Diverse Range of New Disruptions are Driving Exponential Growth – Underpinned by AI



94 – 200mm / 300mm New Fabs and Major Expansions Coming Online Between 2022-2026

War for Talent

Semiconductor Supply Chain % of Global Manufacturing Capacity in 2020



Source: SEMI World Fab Forecast 4Q21

EU Chips Act – Instrumental for a More Resilient Ecosystem

Europe's Microelectronics Ecosystem

European Excellence



Semiconductor Research



Semiconductor For Automotive, IOT, MS/RF, Sensors, Power



Lithography Equipment & Materials



Mobile Network Equipment



Mercedes-Benz



PORSCHE



PHILIPS



ERICSSON



RENAULT



The Future in Motion



AIRBUS



Connecting People



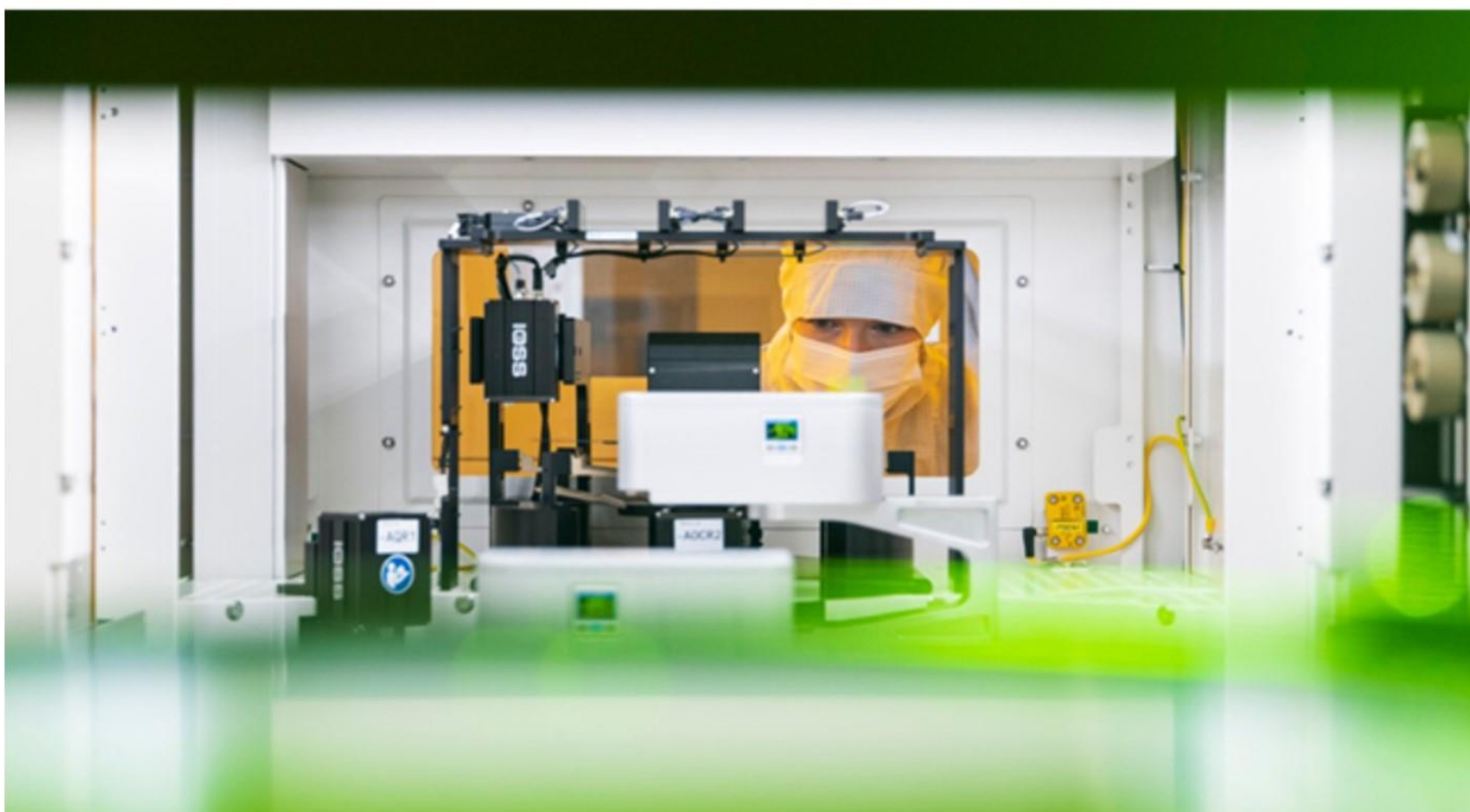
orange™

RTOs

Suppliers

Design & Manufacturing





Players Investing in Europe in 2023

	EUR 400 million , Dresden, Reutlingen (DE), Penang (MA), expanding wafer fabs
	USD 3.4+ billion , incl Agrate (IT), first industrialization of new 300mm wafer fab
	EUR 300+ million , Bernin (FR), new fabrication facility for silicon carbide wafers
	EUR 17 billion , Magdeburg (DE), two fabs
	EUR 400 million , Vantaa (FI), wafer fab for 200 mm silicon wafer production
	EUR 7.4 billion , Crolles (FR), jointly operated 300-mm manufacturing facility for FD-SOI-based technologies
	USD 300 million , Rožnov (CZ), expansion of SiC fab
	EUR 300 million , Barcelona (ES), design centre for "next generation semiconductor devices"
	EUR 5 billion , Dresden (DE), new factory for 300-millimeter analog/mixed-signal and power semiconductors
	EUR 3 billion , Ens Dorf (DE), joint 200-millimetre SiC fab and R&D centre

Source: courtesy of Porsche Consulting

EUR 37,5+ billion in 2022

Global Collaborations Key for a Sustainable & Resilient \$1T Industry

BUSINESS

Intel Plans Semiconductor Plant in Poland as Europe Aims to Boost Chip Production

Polish plant would add to Intel's wafer facility in Ireland and a planned factory in Germany



Infineon kicks off new Fab in Dresden; Completion planned for 2026; Smart Power Fab will generate 1,000 new jobs

Feb 16, 2023 | Business & Financial Press

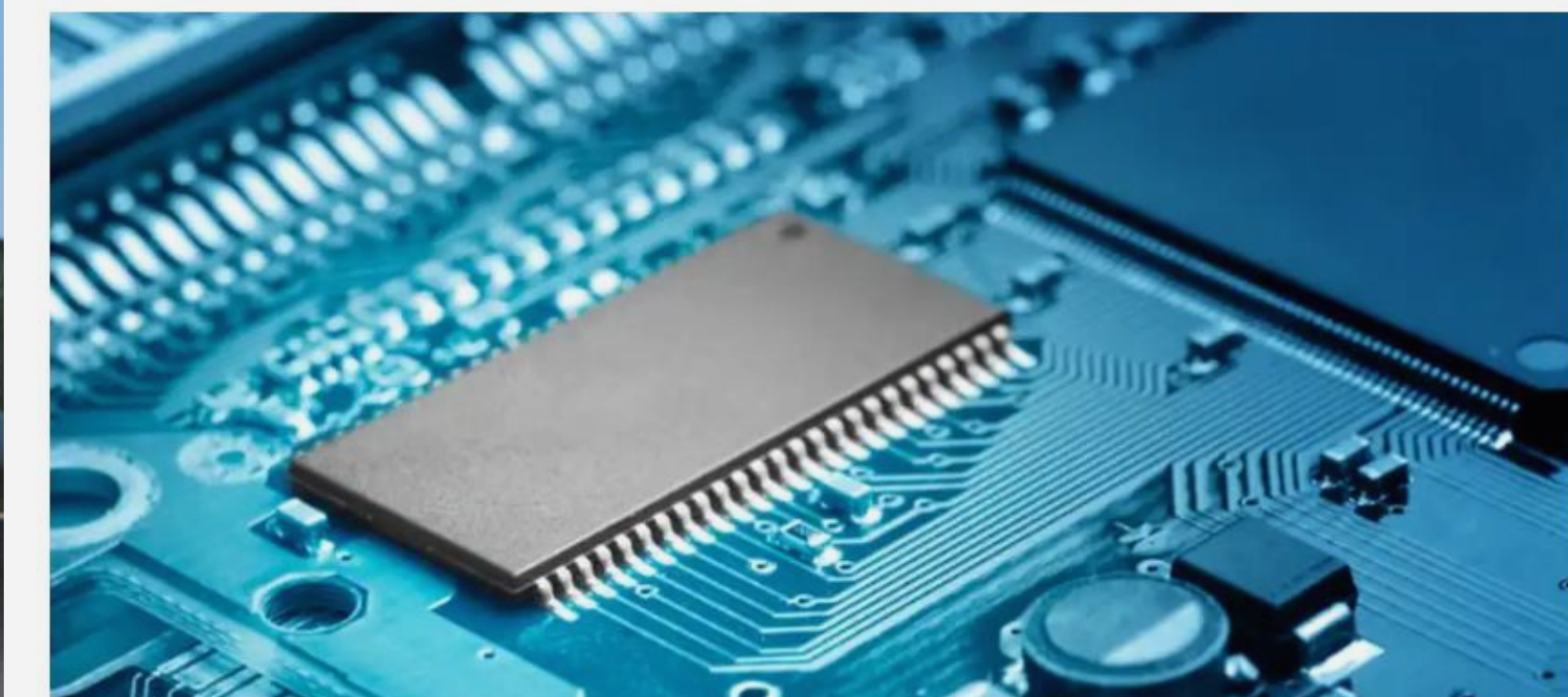
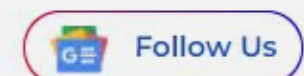


TSMC, Bosch, Infineon, and NXP establish joint venture to bring advanced semiconductor manufacturing to Europe

ESMC marks a significant step towards construction of a 300 mm fab to support the future capacity needs of the automotive and industrial sectors, with the final investment decision pending confirmation of the level of public funding for this project.

Written by [FE Business](#)

August 31, 2023 12:05 IST



Intel Ireland and Soitec

1st EUV for Manufacturing in Europe

intel **newsroom** [Newsroom Home](#) | [Newsroom Search](#) | [International Sites](#) | [Email Opt-in](#)

Intel's New Fab in Ireland Begins High-Volume Production of Intel 4 Technology

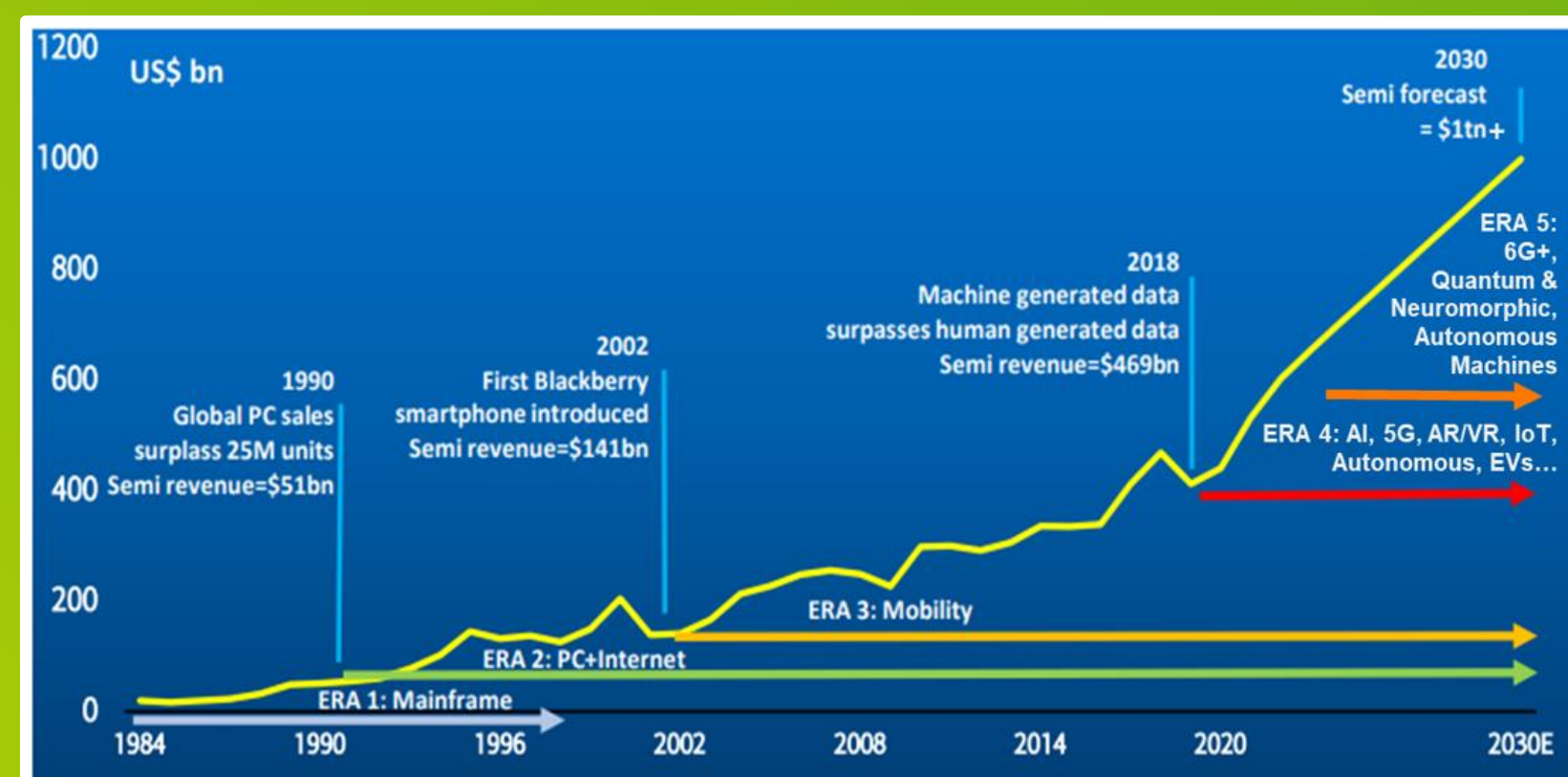
Intel deploys extreme ultraviolet lithography in high-volume manufacturing; use of the technology in Ireland is a first for mass production in Europe.



SOITEC: Soitec opens new plant, positioning SmartSiC™ as a future electric-vehicle standard

September 28, 2023 12:00 ET | Source: [SOITEC](#) [Follow](#)





Headwinds on the Path to \$1 Trillion

✓ semi™
Geopolitics

✓ semi™
Talent Shortage

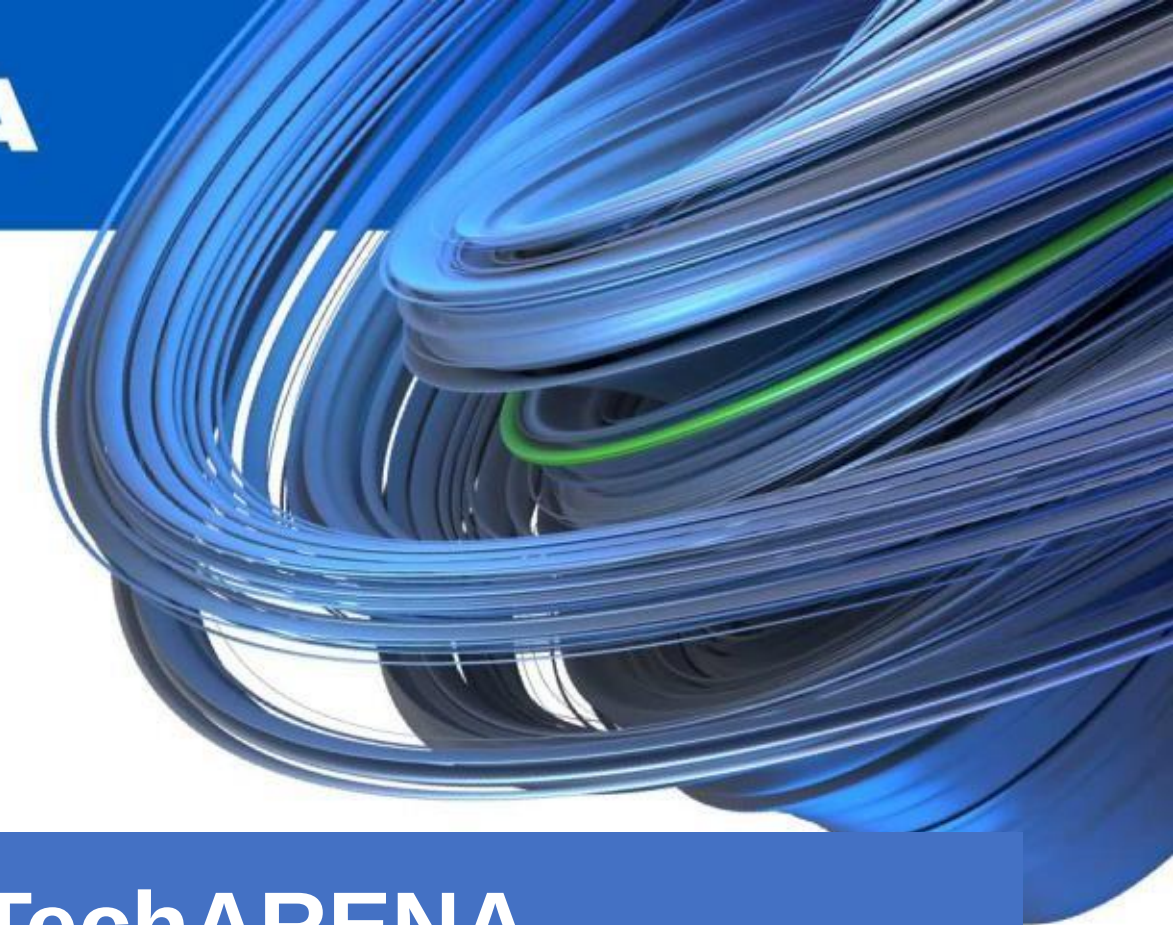
✓ semi™
Climate Change

✓ semi™
Supply Chain Disruptions

Design Complexity

Shorter Product & Demand Cycles

Rising Capex/Opex



PROGRAM OVERVIEW

ICM Conferences

- Fab Management Forum
- Advanced Packaging Conference
- ALD TechDay - Powered by Beneq

Executive Forum

- CEO Summit
- ITF towards NETZERO - Powered by imec
- Global GAAC Summit - Smart Mobility Forum
- Electrification & Power Semiconductors
- Smart MedTech Forum
- Smart Manufacturing
- Materials Innovation
- Connecting Automotive To SiC Manufacturing
- Fireside chat with Wolfspeed
- Empowering People and Industries to Innovate and Invest for a Better Future
- Innovation Showcase

TechARENA

- EU Digital Future Forum
- SEMI Industry Headwinds: European PFAS Restriction Proposal
- Future of Work
- Future of Computing
- Future Disruptions
- SCREEN: Innovation For A Sustainable World
- Integrated Photonics
- SOI for Automotive
- Film Premiere: Chip in
- Meet the SEMIs

ITF towards
NETZERO

Uniting for a greener semiconductor industry

November 14, 2023 ■ Munich, Germany

imec

 **semi**

Skills in the Semiconductor Industry

What are the current challenges in Europe?



There are not enough people available at the employment market with the right motivation and skills



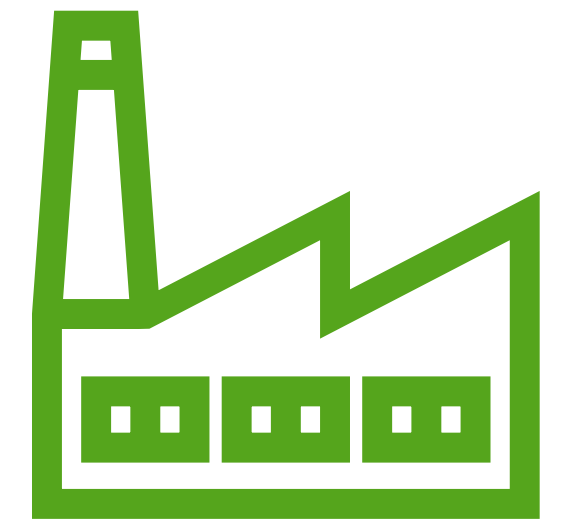
The semiconductor industry has an image problem



The sector does not reflect and benefit from the full diversity of Europe's society and talents



Skills requirements are changing: There are substantial future skills missing



Industry is ramping up at a fast pace, missing staff is a bottleneck for growth

Pact for Skills

What are the current activities in Europe?

EU Projects



- Innovative VET Courses
- Image Campaign for VET and Microelectronics
- Network VET Stakeholders and Advise Policy



- Skills Intelligence in the Microelectronics Sector
- Innovative Online Learning Platform
- Long-term Plan, European Chips Skills Alliance



EU Chip Skills Academy



- Vision Paper, Diversity Survey, Case Studies, Reports
- Training and Operational Tools
- Mentorship and Ambassador Programs

SEMI Europe Initiatives

- SEMI Leadership Accelerator
- P4S Gender Diversity Survey & Report
- Award, SEMI Beacon
- Award, SEMI Spark
- Podcast & Webinar Series
- Blog Article Series, Role Models & Rising Stars
- Blog Article Series, Inclusion & Workplace
- Event Video Testimonials

SEMI HQ Initiatives in Europe

- 20 Under 30 Award
- Careers Platform
- SEMI High Tech U
- SEMI University
- Chip In Documentary Film



semi University



**SEMICON[®]
EUROPA**

SEMICON Europa Highlights



2023 AWARD RECIPIENTS



**Brenda Barth
Ferreira**
Software Engineer



Nicolai Behmann
Technical Solution
Architect



Eloise Bond
Process Engineer



Balazs Bordas
Digital Twin
Implementation Lead



Patrick Döll
Physical IC Design
Engineer



**Andreas Odysseas
Economides**
Managing Director



Laura Esposito
Process Support
Engineer Epitaxy



Mariusz Grabowski
Design Engineer II



Kai Hahn
Project Manager



Raphael Hardegger
Product Manager
Advanced Products



Ayda Iranzadeh
Digital Transformation
Program Manager



Christina Kaiser
Senior Engineer
Integration Engineering



Nico Kerber
Sensor Architect



Shana Massar
R&D Engineer



Nicolas Massignani
Development Engineer



Anna McEvoy
Project Manager Ireland



Katie Naughton
Field Marketing
Specialist I



Andrea Opreni
Development Engineer
for MEMS Design and
Simulation



Théo Le Signor
Sensor Design Engineer



Marieke Vermeulen
Product Engineer



CEO Summit



Stephan Haferl
CEO
Comet



Sébastien Dauvé
CEO
CEA-Leti



Rebecca Dobson
Corporate Vice President EMEA
Cadence



Luc Van den hove
President & CEO
imec



Paul de Bot
General Manager
TSMC



Rutger Wijburg
Chief Operations Officer
Infineon Technologies



Christoph Schell
Executive Vice President and
Chief Commercial Officer
Intel



Koen Lauwers
President Semiconductor
Division
Edwards



Show Floor Highlights

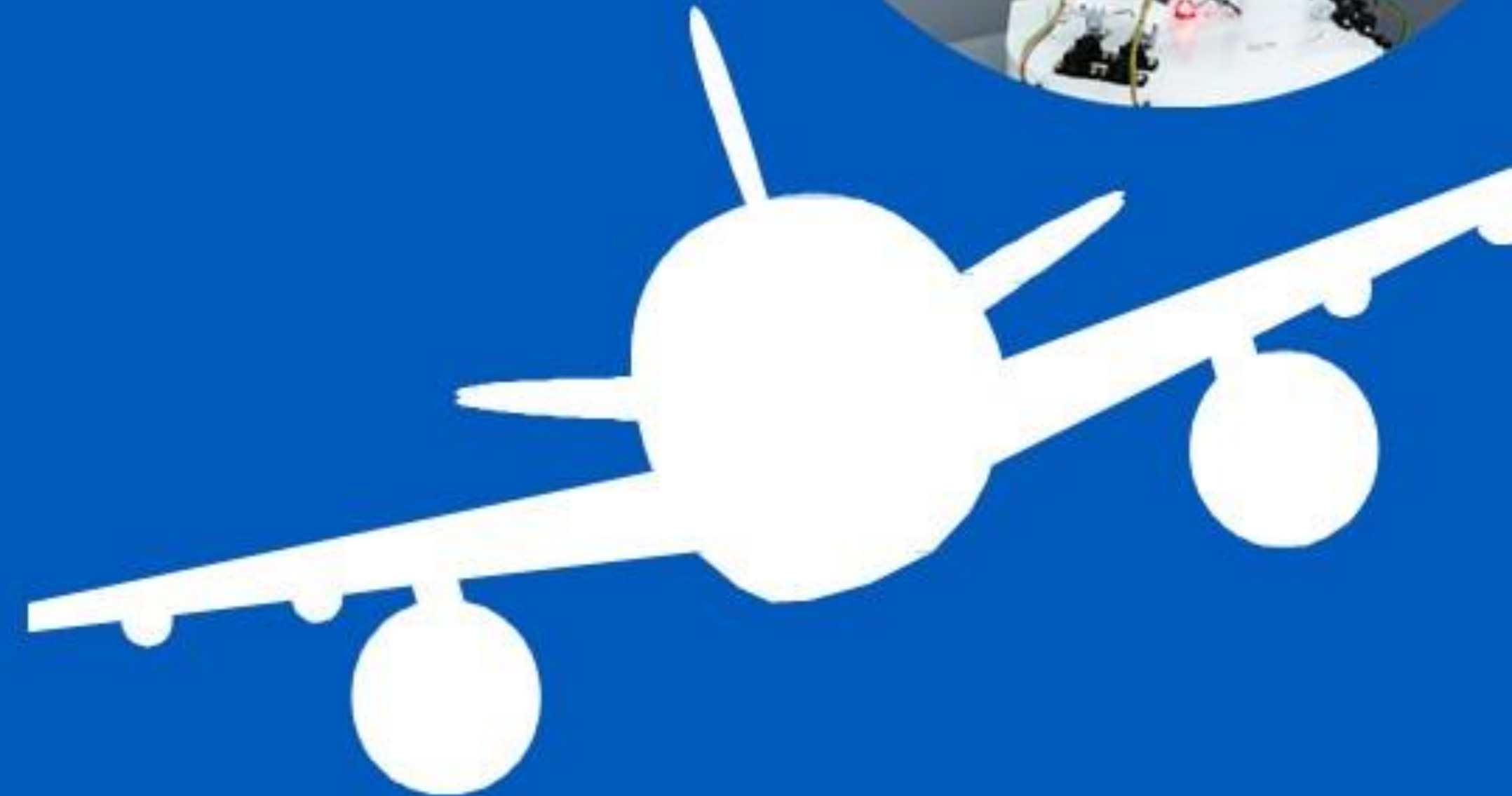


THE SEMI TECHNOLOGY PLAYGROUND



LOCATED IN HALL B0!

- FLIGHT SIMULATOR
- VR GAMES
- ID BUZZ ELECTRO MINIBUS
- HOLOGRAM
- SEMI UNIVERSITY
- SEMI LEADERSHIP ACCELERATOR
- PODCAST STATION
- ONSITE SPACE SELECTION
- SNACK BAR



Corporate Sponsors

Platinum






Gold



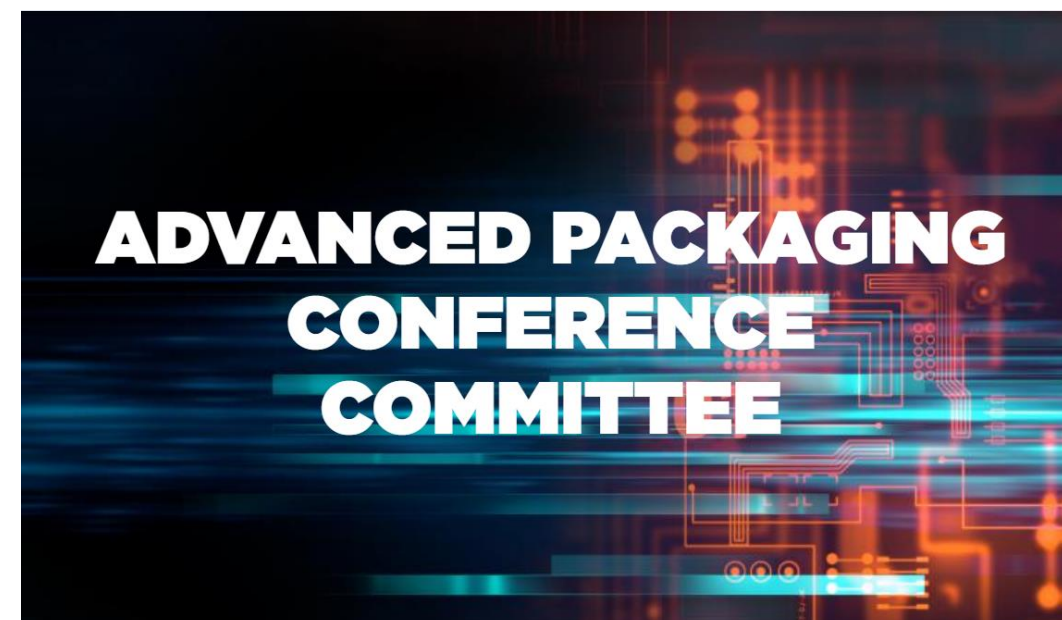
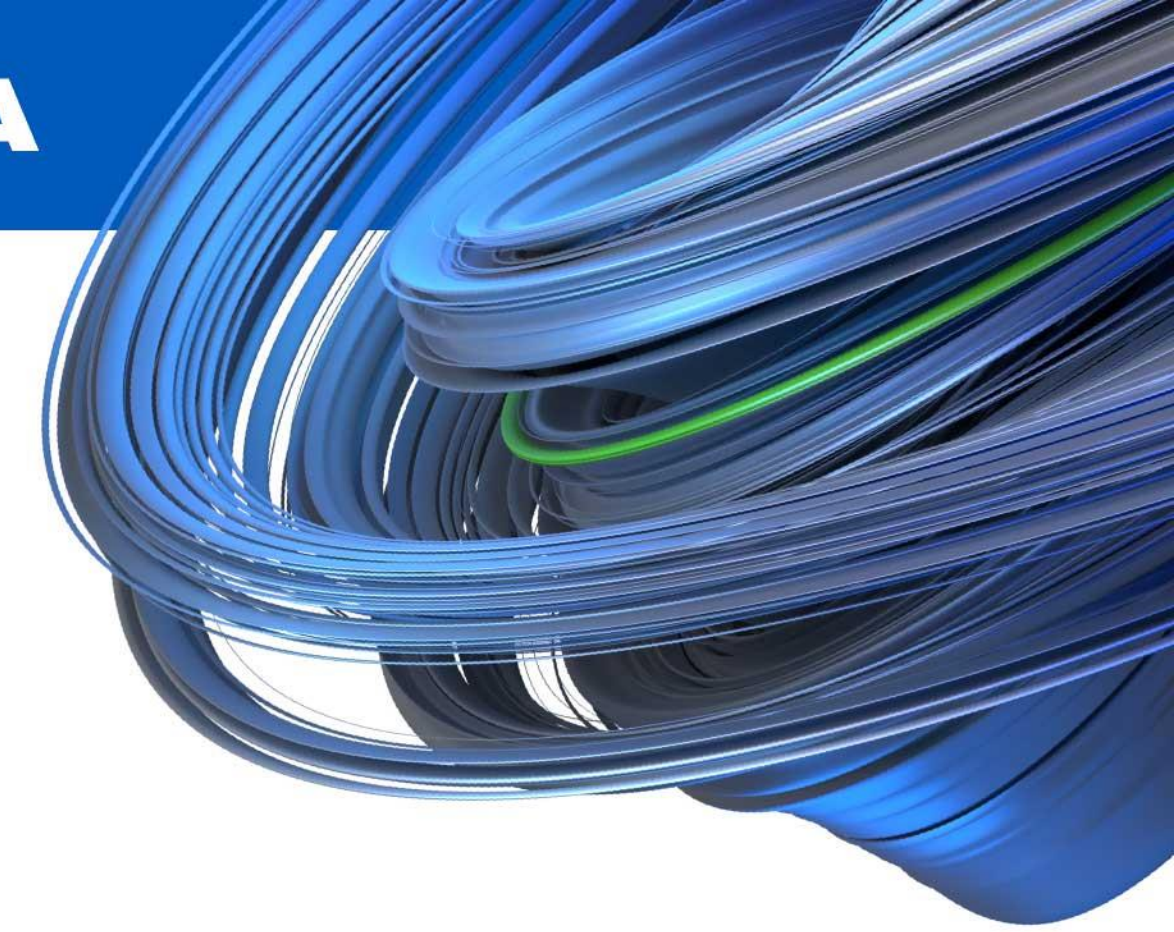
Silver



SEMICON Europa Sponsors



Board and Committee Members



Meet the SEMIs

NOV 17, 2023 | 12:30 pm | TechARENA, Hall B1



Media Partners



SEMI Europe Team (Onsite)



Laith Altimime
President SEMI Europe
SEMI Europe, Berlin Office
laltimime@semi.org



Cassandra Melvin
Senior Director, Business
Development and Operations
SEMI Europe, Berlin Office
cmelvin@semi.org



Christopher Frieling
Director, Advocacy and Public
Policy
SEMI Europe, Brussels Office
cfrieling@semi.org



Serena Brischetto
Director, Marketing and Digital
Engagement
SEMI Europe, Berlin Office
sbrischetto@semi.org



Steffen Kröhnert
Senior Manager, Pack4EU project
SEMI Europe, Berlin Office
skroehnert@semi.org



Adi Hodorov
Senior Manager, Key Accounts
SEMI Europe, Berlin Office
ahodorov@semi.org



Pantelitsa Markus
Senior Manager, Strategic
Programs
SEMI Europe, Berlin Office
pmarkus@semi.org



Victoria Cummings
Senior Manager, Workforce
Development & EU projects
SEMI Europe, Brussels Office
vcummings@semi.org



Reviliani Gani
Manager, Events and Exhibition
Sales
SEMI Europe, Berlin Office
rgani@semi.org



Robert Sellnow
Manager, Events and Exhibition
Sales
SEMI Europe, Berlin Office
rsellnow@semi.org



Arielle Adiputri Kral
Manager, Events and Exhibition
Sales
SEMI Europe, Berlin Office
abudisantoso@semi.org



Ana Bernardo
Manager, Technology Programs
SEMI Europe, Berlin Office
abernardo@semi.org



Maria Daniela Perez
Manager, Communications
SEMI Europe, Berlin Office
mdperez@semi.org



Maria Afsar
Manager, Government Projects
SEMI Europe, Brussels Office
mafsar@semi.org



Stefano Ramundo Orlando
Manager, Advocacy and Public
Policy
SEMI Europe, Brussels Office
sorlando@semi.org



Kartikey Srivastava
Senior Specialist,
Communications
SEMI Europe, Berlin Office
ksrivastava@semi.org



Daria Lieberman
Senior Specialist, Member
Service, Admin & Finance
SEMI Europe, Berlin Office
dlieberman@semi.org



**Wishing you
a Great SEMICON Europa 2023**

Thank You!

