



ISS INDUSTRY STRATEGY SYMPOSIUM

JANUARY 11-14, 2026 THE RITZ-CARLTON, HALF MOON BAY, CA

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TAXI SERVICE

Please note that the availability of shared rides like Uber and Lyft from the hotel are very limited. Contact the Ritz-Carlton Concierge for assistance in scheduling taxi service **at least 24 hours before departure**. Please plan accordingly.

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MOMENTUM TOWARD \$1T: CHARTING CHALLENGES, EMBRACING DISRUPTIONS, AND

SUNDAY, JANUARY 11

3:00–6:00pm Conference Check-in

6:00–7:00 **Welcome Reception**

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MONDAY, JANUARY 12

7:00–8:00am **Breakfast**

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8:00–8:05 **Welcome Remarks**

Joe Stockunas, President, **SEMI Americas**

8:05–8:15 **SEMI Industry Update**

Ajit Manocha, President and Chief Executive Officer, **SEMI**

8:15–8:30 **Opening Remarks**

Steven Johnston, PhD, Co-Chair, **ISS Committee**; Vice President and Head of Technology Innovation and Enablement, **EMD Electronics**

8:30–9:00 **OPENING KEYNOTE**

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The Race to a Trillion: Scaling Technology, Capacity, and Culture in the AI Era

Naga Chandrasekaran, Executive Vice President, Chief Technology and Operations Officer, and General Manager of Intel Foundry, **Intel Corporation**

SESSION 1 ECONOMIC TRENDS

Session

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9:00–9:05 **Session Overview**

Nigel Wenden, Member, **ISS Committee**; Chief Executive Officer, **WGNSTAR**

9:05–9:35 **The Economic Outlook for 2026 and Semiconductors: Looking at the Risks**

Duncan Meldrum, Chief Economist, **Hilltop Economics**

9:35–10:05 **Geopolitical Outlook 2026: Trade Truces and Ceasefires?**

Matt Gertken, PhD, Chief Strategist, Geopolitical Strategy and US Political Strategy, **BCA Research**

10:05–10:35 **Break**

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SESSION 2 SEMICONDUCTOR TRENDS

Session Sponsor



10:35–10:40 **Session Overview**

Indradeep Ghosh, Member, **ISS Committee**; Head of Market Intelligence, **Micron Technology**

10:40–11:10

Tokens to Infrastructure

Dylan Patel, Founder, Chief Executive Officer, and Chief Analyst, **SemiAnalysis**

11:10–11:40

Memory in the Age of AI, Scarcity as the Default State?

Mike Howard, Vice President of DRAM and Memory Markets, **TechInsights**

11:40–12:10

Semiconductor Outlook: Key Forces Shaping 2026 and Beyond

Jeff Janukowicz, Research Vice President, **IDC**

12:10–1:30pm

Lunch

1:30–2:00

Capex and WFE Outlook: Riding the Wave

Bob Johnson, Vice President, Analyst, **Gartner**

2:00–2:30

From AI Gold Rush to Fab Reality: Capacity, Fab Investment and Materials in a Fragmenting World

Clark Tseng, Senior Director, Market Intelligence Team, **SEMI**

2:30–3:00

How Advanced Packaging Is Enabling the Most Complicated Devices, Both for More Moore and More Than Moore Applications

Jean-Christophe Eloy, PhD, President and Founder, **Yole Group**

3:00–3:30

Break

SESSION 3

MARKET DRIVERS

3:30–3:35

Session Overview

Bill En, PhD, Member, **ISS Committee**; Vice President, **AMD**

3:35–4:05

AI at the Heart of Data Center and Edge Semi Growth

Mario Morales, Head of Corporate Strategy and Partnerships, **AMD**

4:05–4:35

Digitizing Biology Using Chip-Based Life Science Tools

Peter Peumans, PhD, Senior Fellow and Chief Technology Officer Health, **imec**

4:35–5:05

Shaping Next-Gen Mobility: Semiconductor Needs, EV Innovation, and Autonomy

Kay Stepper, PhD, Vice President, ADAS and Autonomous Driving (AD), **Lucid Motors**

5:30–8:30

GET YOUR GAME ON RECEPTION

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REALIZING NEW OPPORTUNITIES

TUESDAY, JANUARY 13

7:00–8:00am **Breakfast** Sponsor **HEIDENHAIN**

SESSION 4 TECHNOLOGY

8:00–8:05 **Session Overview**
Ramune Nagisetty, Member, **ISS Committee**;
Enterprise Account Director, **PDF Solutions**

8:05–8:35 **KEYNOTE** Sponsor 
How Deposition and Etch Are Reshaping the 3D Era
Vahid Vahedi, PhD, Senior Vice President,
Chief Technology and Sustainability Officer,
Lam Research

8:35–9:05 **Enabling the Next Era of High-Density Computing**
David McCann, Senior Vice President,
Business Unit, **Amkor Technology**

9:05–9:35 **AI Leadership Through Scalable Memory for Logic Fabs: Strategy and Implementation Paths**
Sasikanth Manipatruni, PhD, Co-Founder
and Chief Technology Officer,
Kepler Computing

9:35–10:05 **Essential Semiconductors: Industry Megatrends and Solutions**
Ted Letavic, Corporate Fellow, Senior Vice
President, Technology and Innovation,
GlobalFoundries

10:05–10:35 **Break**

10:35–10:45 Shari Liss, Vice President,
Global Workforce Development and
Initiatives, **SEMI**

10:45–11:00 **STUDENT PITCHES**

SESSION 5 NAVIGATING DISRUPTIONS

11:00–11:05 **Session Overview**
Angélique Raley, Senior Director of
Technology, Semiconductor Integration,
3DI, **Tokyo Electron America**

11:05–11:35 **How AI Is Impacting the Supply Chain Ecosystem for Semiconductors**
Handel Jones, PhD, Founder and
Chief Executive Officer, **IBS**

11:35–12:05

**Towards a Greener Future:
More Sustainable Materials in
Semiconductor Manufacturing**

Kevin Gorman, Senior Vice President
and Head of Patterning Solutions,
EMD Electronics

12:05–1:30pm

Lunch

1:30–2:00

**Wafer Bonding: A Cornerstone of
Future Semiconductor Architectures**

Paul Lindner, Executive Technology
Director, **EV Group**

2:00–2:30

**Reinventing the Physical Layer:
The Path to the Million-XPU AI Data Center**

Nick Harris, Founder and Chief Executive
Officer, **Lightmatter**

2:30–3:00

**Uncovering the Next Chapter for
AI Computing**

Mark Patel, Senior Partner,
McKinsey & Company

3:00–3:30

**Sustainable Silicon: Building Energy-Efficient
AI Infrastructure for the Semiconductor Era**

Tim Murnin, Head of Industry Solutions, **AWS**

3:30–4:00

Break

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4:00–5:00

**PANEL—
Capitalizing on Disruption**

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Moderator

Dan Armbrust, Co-Founder
and Director, **Silicon Catalyst**

Panelists:

- Audrey Charles, Senior Vice President,
Corporate Strategy and Advanced
Packaging; President, Lam Capital,
Lam Research
- Nick Harris, Founder and Chief Executive
Officer, **Lightmatter**
- Michael Stewart, PhD, Managing Partner,
M12, **Microsoft's Venture Fund**
- Erik Hosler, PhD, Chief Executive Officer
and Founder, **OBSIDIA Semiconductors**

6:30–9:00

**ISS SOIRÉE RECEPTION
AND DINNER**

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WEDNESDAY, JANUARY 14

- 7:00–8:00am **Breakfast**
- 8:00–8:30 **KEYNOTE** *Sponsor* **Powering the Future of AI: Architecting for Scalable, Energy-Efficient Compute**
Mark Fuselier, Senior Vice President, Technology and Product Engineering, **AMD**
- 8:30–9:00 **KEYNOTE** *Sponsor* **Semiconductors at the Center of Risk, Power, and National Security: A National Security Perspective on Risk and Resilience**
The Honorable Kirstjen Nielsen, Former **U.S. Secretary of Homeland Security**; President and Founder, **Lighthouse Strategies**
- 9:00–10:00 **BULLS & BEARS PANEL** **Unleashing AI Proliferation Through Semiconductor Innovation**
Moderator
Lucia Greenblatt, Head of Semiconductors and Electronics, **Global Corporate and Investment Banking Group, Americas**; Managing Director, **MUFG**
Panelists:
- Stacy Rasgon, PhD, Managing Director and Senior Analyst, U.S. Semiconductors and Semiconductor Capital Equipment, **Bernstein Research**
 - Melissa Weathers, Director Equity Research, **Deutsche Bank**
 - Brian Chin, Director, Applied Technologies, **Stifel**
 - Krish Sankar, Managing Director, **TD Cowen**
- 10:00–10:15 **Closing Remarks**
Mark Slezak, Co-Chair, **ISS Committee**; President, **JSR Micro**

ISS Agenda as of 1/7/2026. Subject to Change.



ISS SPEAKER Q&A

LINK: semiamericas.org/iss26-qa

PASSCODE: ISS2026

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ISS 2026 PRESENTATION ACCESS

LINK: semiamericas.org/iss26-presentations



Password found in the Welcome Email sent on January 8, 2026.

STUDENT PITCHES & POSTERS

Low-Temperature Diamond: A Key Technology for Device Level Thermal Management

Anna Kasperovich, PhD Candidate, Electrical and Electronics Engineering, Stanford University

Electronic-Photonic Integration Strategies for Space Savings & Thermal Resilience

Russell Schwartz, PhD Candidate, Graduate Research Assistant, Department of Electrical and Computer Engineering, University of Florida

Abating PFC and HFC Emissions Using Regenerable Ultramicroporous Metal-Organic Frameworks

Bevan Whitehead, PhD Graduate Student, Inorganic Chemistry, University of Rochester

GET YOUR GAME ON!

Pick a square on the Game Board for a chance to win a prize!

Come to the SEMI Registration Desk Sunday through the Monday afternoon break.

One square per person please. FREE to play.

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MONDAY, JAN 12 • 5:30–8:30 • OBSERVATORY