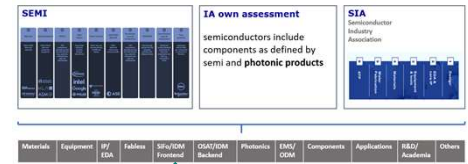
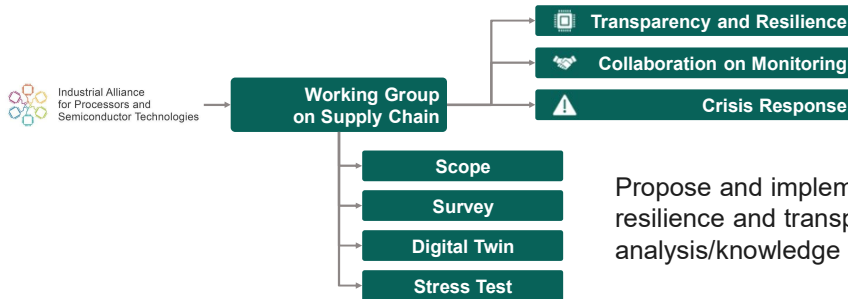


Supply Chain Working Group Cluster SiFo/IDM Frontend



Objectives of the Supply Chain Working Group



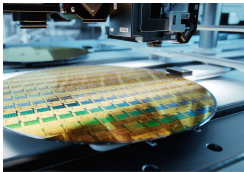
An industry working group working for the European industry on **End-to-End semiconductor*) supply chain and supply chains containing semiconductors.**

Join



Propose and implement measures to increase supply chain resilience and transparency, Support COM and ESB Board with analysis/knowledge and advise on possible future actions

Cluster SiFo¹⁾/IDM²⁾ Frontend



Definition:

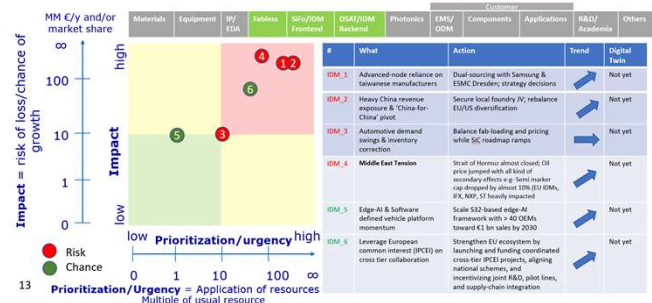
Covers silicon foundries and integrated device manufacturers from 100 to 300 millimeter wafer process, from front-end transistor formation to back-end interconnect, including lithography, deposition, etching, ion implantation and diffusion, cleaning, and chemical mechanical polishing.

Pivotal actors in semiconductor SiFo¹⁾/IDM²⁾ Frontend:

- TSMC [\[link\]](#) — world's leading pure-play foundry; ~70% share in Q2'25
- Samsung (Foundry & IDM) [\[link\]](#) — #2 foundry; major logic + memory manufacturer
- Intel (IDM/Intel Foundry) [\[link\]](#) — major IDM building an external foundry business (IDM 2.0)
- GlobalFoundries [\[link\]](#) — top specialty/mature-node foundry (auto, Radio Frequency, mixed-signal)
- UMC [\[link\]](#) — leading mature-node foundry (widely used for cost-efficient nodes)
- Infineon (IDM) [\[link\]](#) — Europe's leading power/automotive IDM; 300 mm power fabs in Dresden & Villach
- NXP (IDM/fab-lite) [\[link\]](#) — Automotive processors/Microcontroller Units and secure connectivity
- Bosch (IDM) [\[link\]](#) — Automotive semiconductors & MEMS leader
- Texas Instruments (IDM) [\[link\]](#) — largest analog IDM; scaling multiple 300 mm fabs (US)
- STMicroelectronics (IDM) [\[link\]](#) — European IDM ramping 300 mm capacity (Crolles, Agrate)
- Elmos Semiconductor [\[link\]](#) — automotive mixed-signal and sensor Integrated Circuits (ultrasonic, motor/LED control, power management)
- X-FAB [\[link\]](#) — specialty foundry for analog/mixed-signal, high-voltage semiconductor micro-manufacturing technologies
- Nexperia Europe [\[link\]](#) — discrete semiconductors and power devices (diodes, MOSFETs, GaN), logic ICs; high-volume manufacturing
- SMIC [\[link\]](#) — Pure-play foundry; mature/specialty nodes (28nm+), CIS/power/RF
- Vishay [\[link\]](#) — Discrete semiconductors & passives (resistors/capacitors/inductors; diodes/MOSFETs/opto)
- Diotec Semiconductor [\[link\]](#) — Discrete diodes, rectifiers, TVS; custom rectifier solutions
- Diodes Incorporated [\[link\]](#) — Discrete, analog & mixed-signal ICs; power management, protection, interface

1) Silicon Foundry 2) Integrated Device Manufacturer

Feedback (on Definition, on companies, on actual Chance/Risk Matrix, on increasing resilience, on ...)



The TASK

- Think about IDEAS & SUGGESTIONS to link the Base to the overall objectives
- Do some (silent) BRAINWRITING to put your Idea & Suggestion to a POST-IT
- Put your Post-it on the Poster with some EXPLANATORY WORDS to the group
- BRAINSTORM in the group about the ideas and make it as meaningful as possible
- PRESENT to the group (allow different opinions to be heard as well)

- Risk due to geopolitical situation in our domain and its supply chain mitigation strategy
- Risk due to complexity increase in our domain and its supply chain mitigation strategy
- Chances due to AI in our domain and how to accelerate harvesting the chances
- Chances due to collaboration in our domain and how to accelerate harvesting the chances