



Bravely Marching in the Wrong Direction

Dear Reader,

All the things that were once planned for a European semiconductor industry: From MEDEA in the 2000s to ENIAC/CATRENE in the 2010s, billions were planned to be invested in micro- and nanoelectronics to at least just match the pace of the massively funded Asian manufacturers. 20 years ago, the goal was to achieve leaps forward in terms of technology for European Fabs of 130-nm structure up to 90/45 nm; in 2010 it was about completely different dimensions in terms of 25 nm and also investment. Unfortunately, analyses such as “Especially in Asian countries [...] state-backed R&D efforts are increasing, particularly in order to become more competitive in terms of chip design and to win market share. Therefore, an increase in state-backed and private R&D activities in Germany would have a significant effect in research competitiveness” (BMBF) did not necessarily lead to the correct conclusions or were not consistently followed. Today, thanks to EUV-Litho, we have 5-nm structures, currently only mastered by TSMC/Samsung: The epicenters of the semiconductor world are Taiwan, South Korea, USA and possibly also China. Even if we do not forget Infineon, NXP or STMicro, none of the ten largest protagonists is located in the EU and the trend is still “size matters.”

So do we turn the page on the topic of semiconductors and Europe? Possibly, since a further signal in the wrong direction is the intended sale of the wafer producer Siltronic to an Asian company. This might make business sense, but hardly in terms of industrial policy. Europe’s electronic dependency will not be weakened with ambitiously funded, but anemically implemented funding programs. China is

investing strategically in the topic of electronic manufacturing in order to achieve a self-sufficiency ratio of 40 %. This approach would also make logical sense for Europe: Since the most important manufacturers of certain components are located in the USA or Asia, events such as the Coronavirus pandemic, earthquakes or political conflicts can result in the sudden severance of supply chains. Bottlenecks in the supply of steel or rare Earths may be compensated for, however the situation is different for electronic components that have been homologated in a vehicle. In any case, it has become apparent that when it comes to allocation, generally the company with the largest order volume receives service first, and this is more likely to be not car manufacturers but manufacturers of consumer electronics. Since certain components such as processors or memory are indispensable and must remain in supply over long periods of time specific to vehicles, the topic of the semiconductor supply chain could appear on the radar more often.

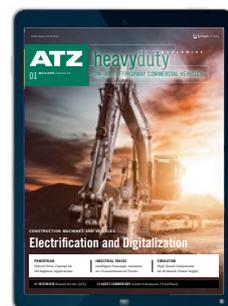
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