

Economic & Geopolitical Uncertainties, Trade Tensions and Export Controls

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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 Willemms, 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

AJIT MANOCHA

PRESIDENT & CEO, SEMI

- 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

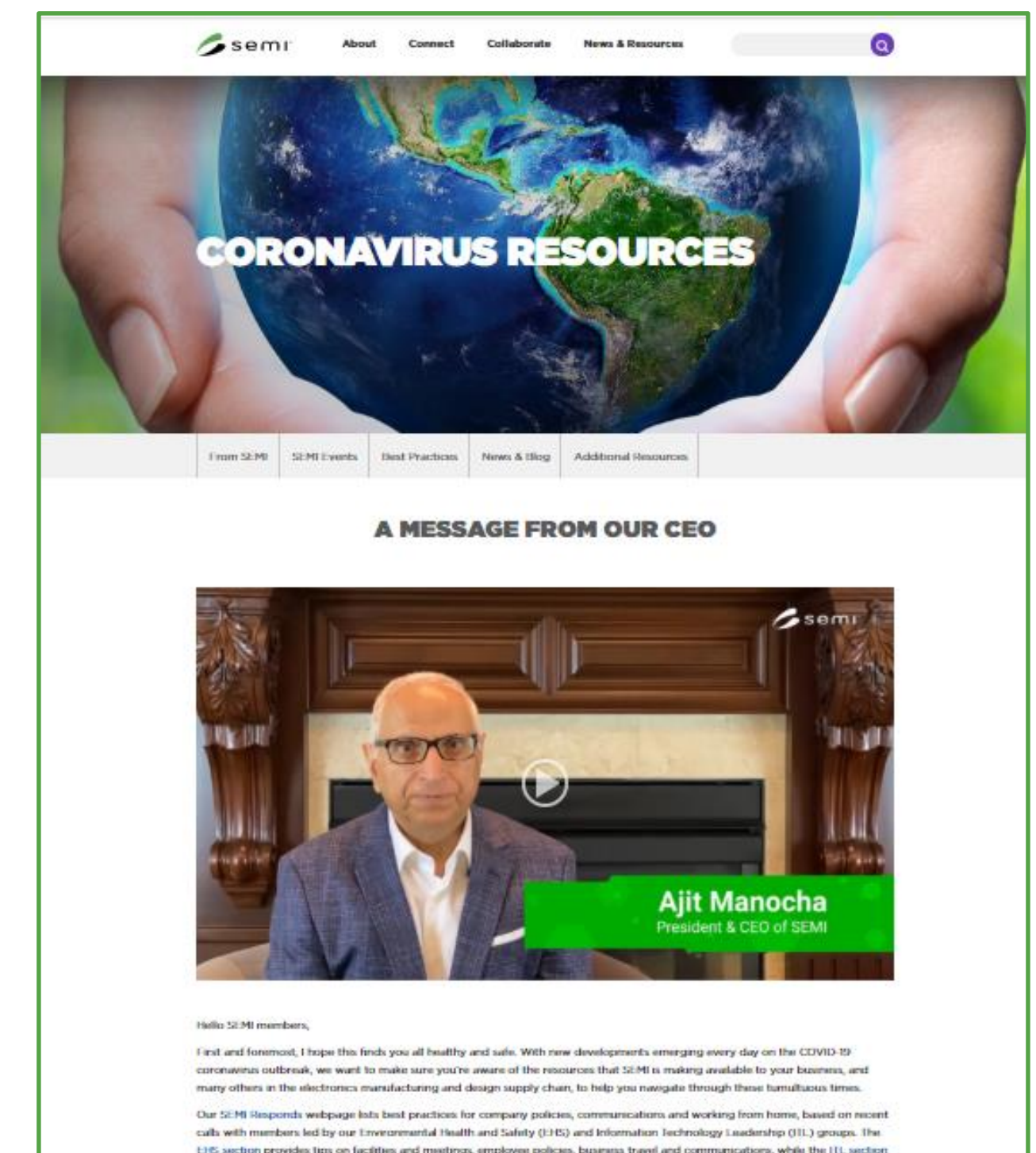


Industry & SEMI Update

- **SEMI response**

www.semi.org/COVID-19

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

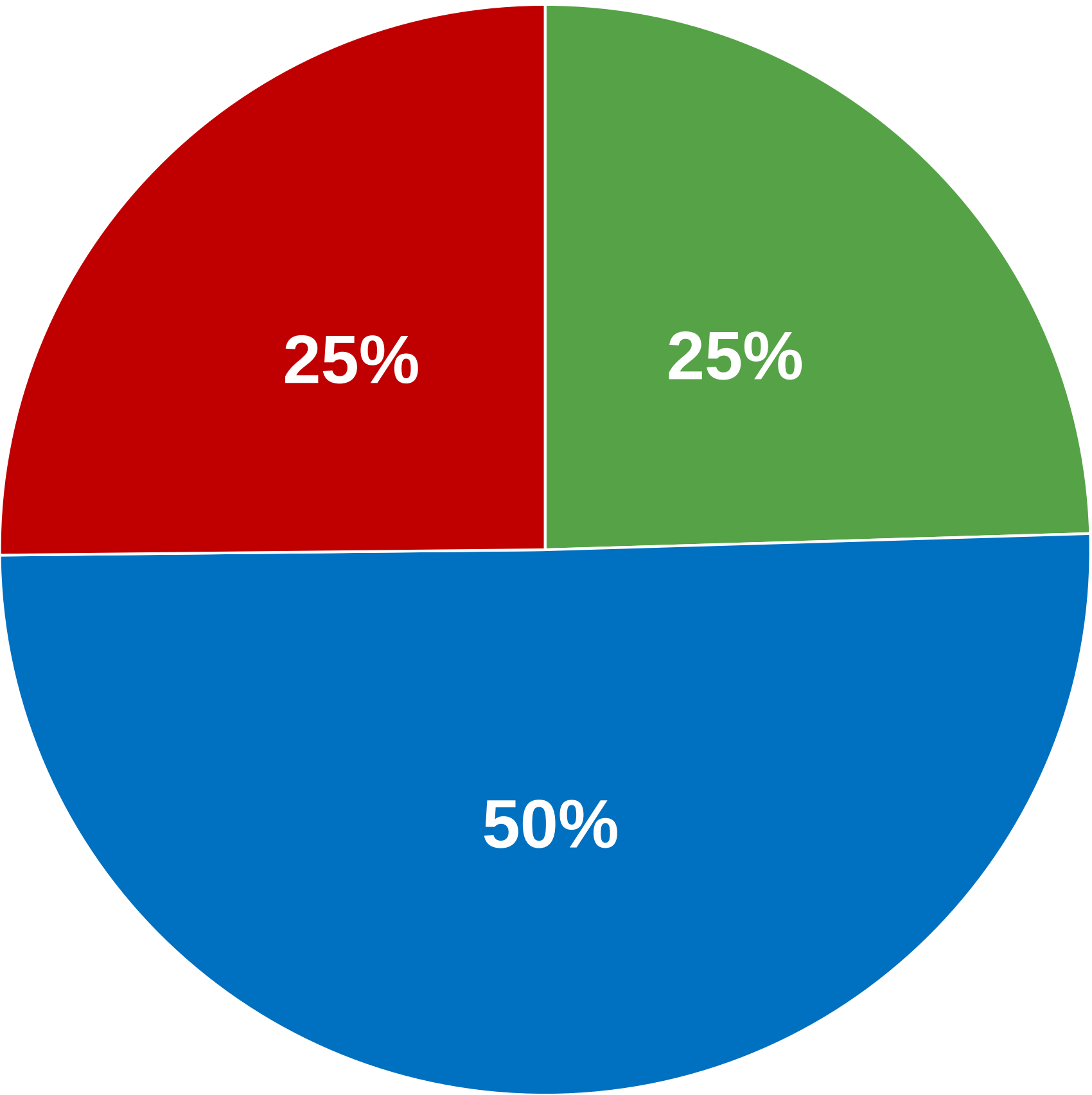


Microelectronics More Optimistic for Recovery in Next 12 Months

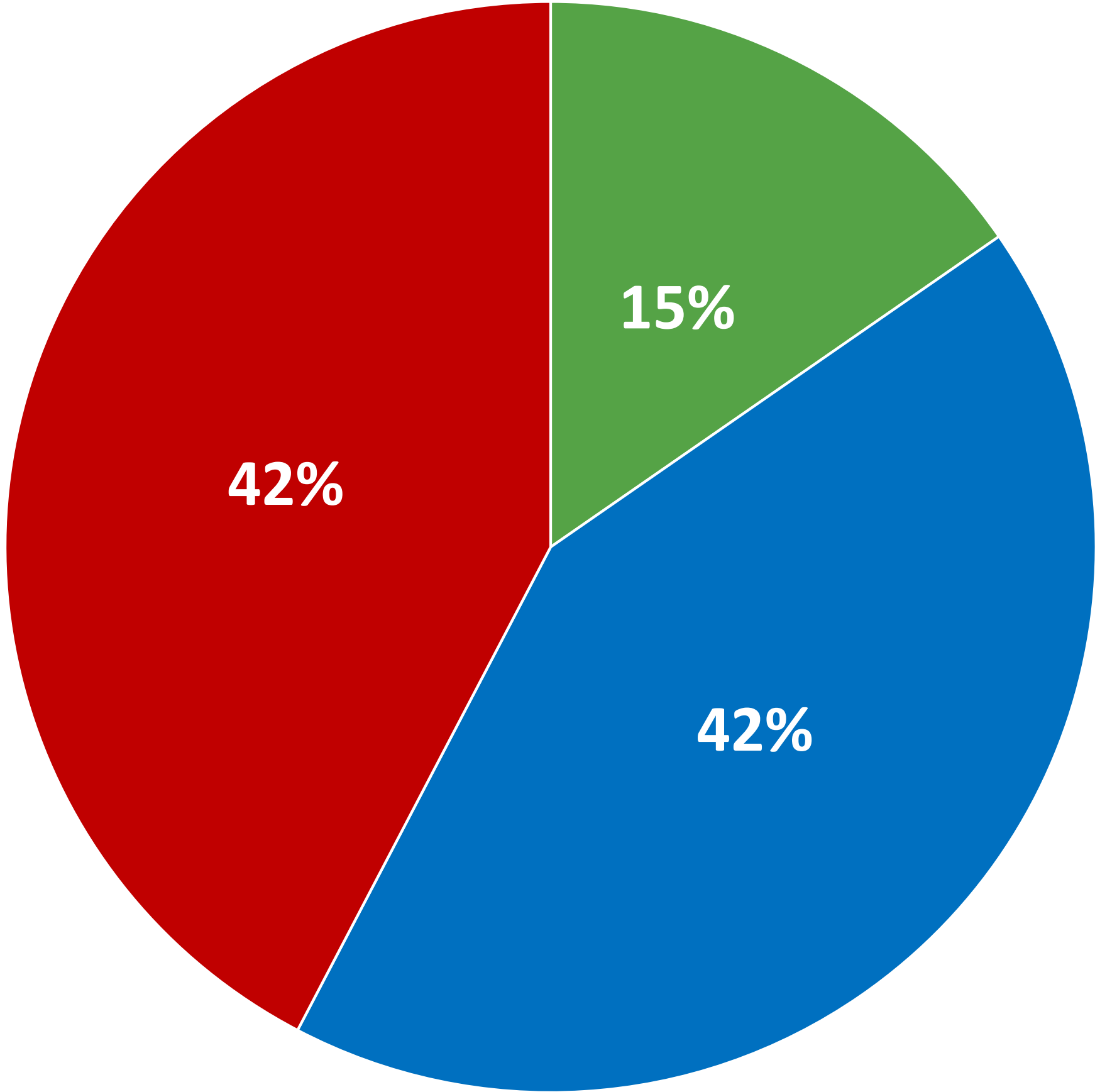


Microelectronics Industry

■ Very optimistic ■ Optimistic ■ Not optimistic

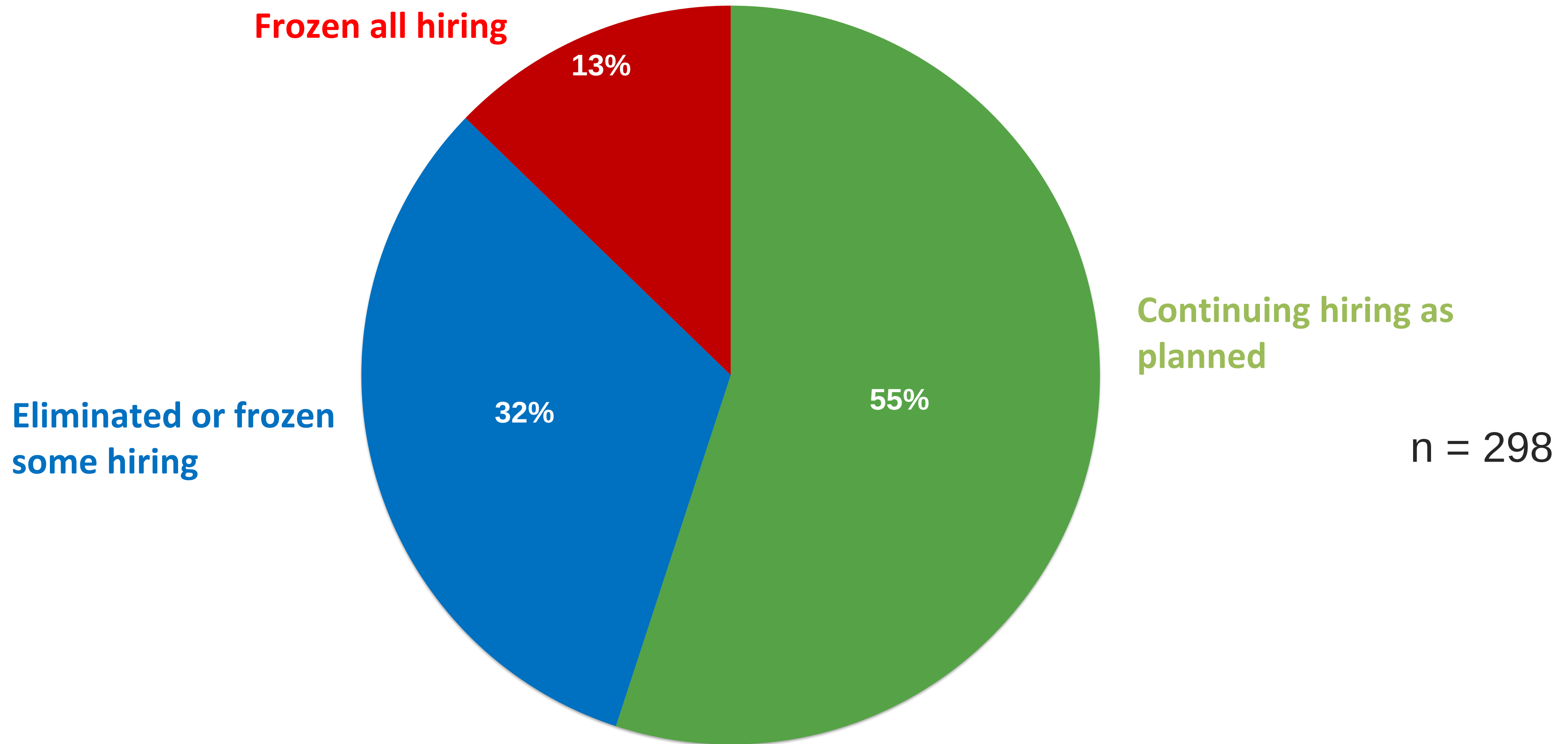


Global Economy

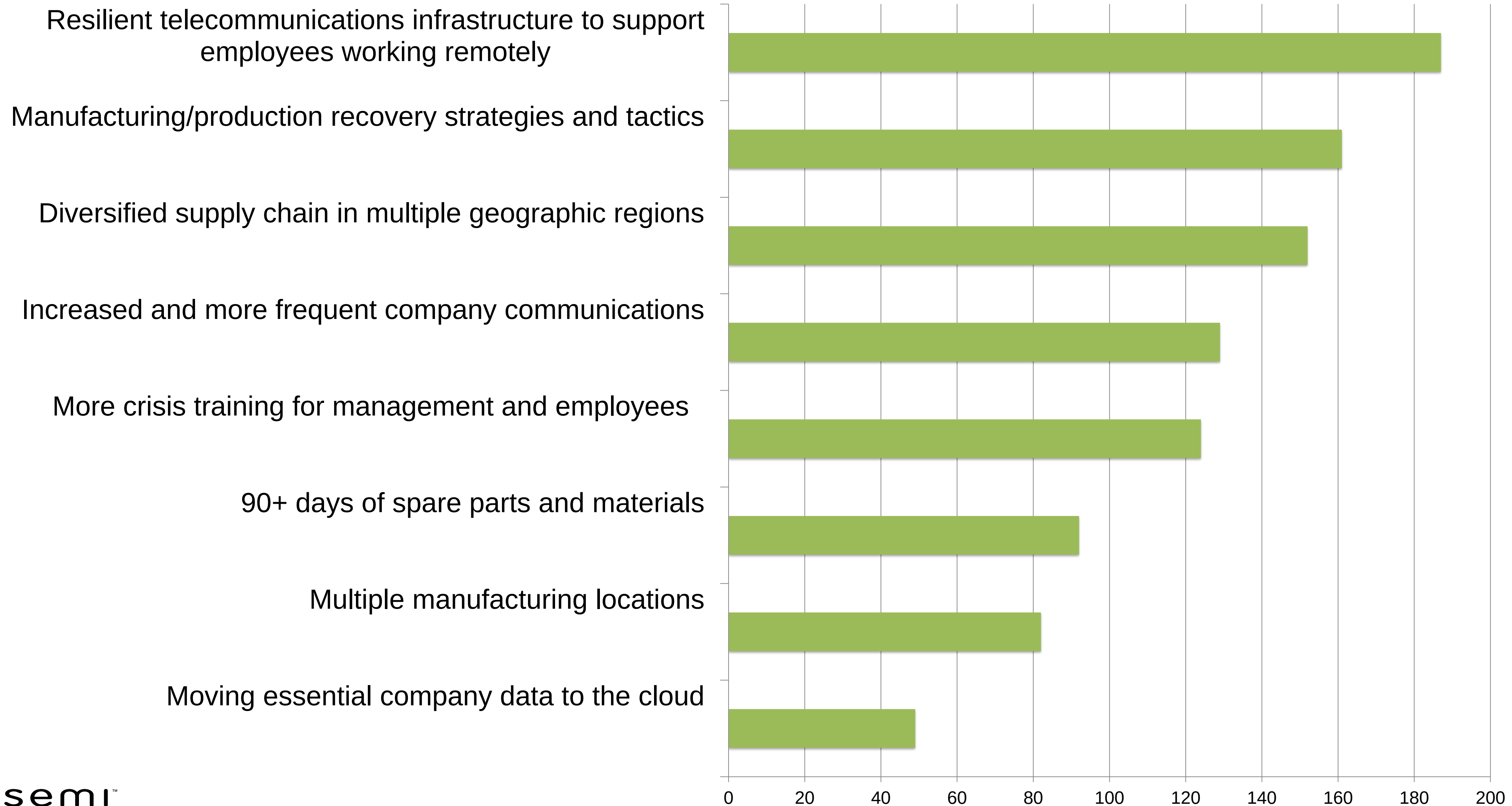


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Hiring Remains Strong for Microelectronics Industry



Key Elements of Business Continuity for the Future



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

The background is a solid blue color. In the center, there is a faint, light blue illustration of a hand holding a globe. Three butterflies are also faintly visible: one on the left, one on the right, and one at the top. In the top left corner, there are two overlapping hexagons. In the bottom right corner, there is a single hexagon.

SEMI Global Advocacy

Joe Pasetti

Vice President, SEMI Global Advocacy

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

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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**



THANKS TO:



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