

To DSIT, DBT and UKRI

We are writing to introduce the UK Semiconductor Leadership Group, which has been created at the request of multiple UK Semiconductor companies and members of the TechWorks industry association. The group consists of senior level representatives from across the UK semiconductor value chain.

Our aim is to work alongside Government to help identify the strengths and opportunities which face the UK semiconductor sector, and, where helpful, to propose expert advice and recommendations for directed action which can deliver the most positive impact.

We have been closely following the development of the UK Government's semiconductor strategy – an initiative which we strongly support – and following the recent DCMS Invitation to Tender, we are pleased to be able to contribute to this going forward.

Some background to our decision to establish this group is given below:

Who are we?

Techworks is the UK Deep tech industries association, consisting of member companies across the UK Deep tech scene. We build adjacent collaborative networks representing major players in key technology sectors to create vision and scale, driving profitable growth for UK business.

Originally conceived as the National Microelectronics Institute (NMI) in 1996, TechWorks now consists of 270 member companies representing 20,000 UK employees across four collaborative networks and is supported by a board of directors comprising senior executives, entrepreneurs and investors from across the UK Deep tech landscape.

The UK Semiconductor Senior Leadership Group is a recent Techworks initiative and represents a wide range of experience in all aspects of semiconductor design, development and manufacture from Intellectual Property (IP) and 'chip design, through product engineering, tooling and manufacture, to test, packaging and sales.

The intention is to provide a balanced all-industry viewpoint for the semiconductor sector, which is a superset of the current Techworks NMI semiconductor supply chain trade association.

Why semiconductors?

Globally, the semiconductor device market is expected to double to more than \$1 Trillion by 2030 (McKinsey). However, it remains a challenging industry demanding long term strategy, scale and international collaboration to be sustainable. There has been much attention given to the semiconductor industry recently due to recognition of its significant impact on the global economy and the possible vulnerability of its supply chains.

Although small on a global scale, the UK still has a thriving semiconductor industry which is well positioned to take advantage of future massive growth trends in Digital Transformation, Industry 4.0, Digital health, Metaverse, Autonomous vehicles, and Robotics, to name but a few. The UK has maintained skills across the industry from research and design to manufacture, and we believe that, right now, there is a unique

opportunity for the UK to build a semiconductor sector which can differentiate and compete on a global stage.

This will require close collaboration across the supply chain; in design, manufacture, packaging and testing to be successful.

Government have an important role to play here. No country in the world has built a semiconductor sector of any strength without some form of Government involvement.

We are ready to help shape the discussion and foster collaboration between industry and government on how to make sure any Government involvement is targeted and smart. We believe that by working together, we can make the UK a strong contributor to the global semiconductor industry.

What next?

We recognise that the UK economy faces a challenging time in the short term. Globally the semiconductor industry is also facing a period of adjustment to new supply and demand pressures. In the UK much can be achieved if we work together to build a shared vision and a common approach.

We, the undersigned members of the Techworks Semiconductor Leadership Group, aim to engage with government policy-makers acting as a trusted representative of industry providing clear advice on how, together, we can build a UK semiconductor industry ready for the 21st century.

We hope that you will welcome this initiative and agree to open a dialogue so that we can work together in this strategically important sector.

<i>Member</i>	<i>Company</i>	<i>Expertise</i>
Charles Sturman (<i>chair</i>), CEO	Techworks	Fabless semi business
Alastair McGibbon (<i>co-chair</i>), Head of BD	Space Forge	Compound Semiconductor
Jillian Hughes (<i>secretary</i>), Network Director	NMI	Manufacturing
Amar Abid-Ali, CCO	CSA Catapult	Compound Semiconductor
Giorgia Longobardi, CEO	Cambridge GaN	Fabless semi business
Mark Lippett, CEO	XMOS	Fabless semi business
Ian Lankshear, CEO	En Silica	Fabless semi business
Simon Beresford-Wylie, CEO	Imagination	IP Licensing
Stephen Pattison, VP Public Affairs	ARM	IP Licensing
Simon Thomas, CEO	Paragraf	Device design & manufacture
Scott White, CEO	Pragmatic	Device design & manufacture
Salvatore Pavone, VP Operations	Lumentum	Device design & manufacture
Daniel Picado, Operations Director	BOURNS	Device design & manufacture
John Turton, Operations Director	Huawei Technologies	Device design & manufacture
Keith Strickland, CEO	Plessey	Device design & manufacture
Andy Birnie, Country Manager	NXP	Device design & manufacture
Ben Jackson, MD	BJD Group	Power Electronics consulting
Rae Hyndman, CEO	Clas-SiC	Manufacturing
Steven Duffy, CEO	Alter Technology	Packaging
Steve Lambert, Head of Electrification	McLaren Applied	OEM
Gerry Thurgood, CEO	Thermco Systems	OEM