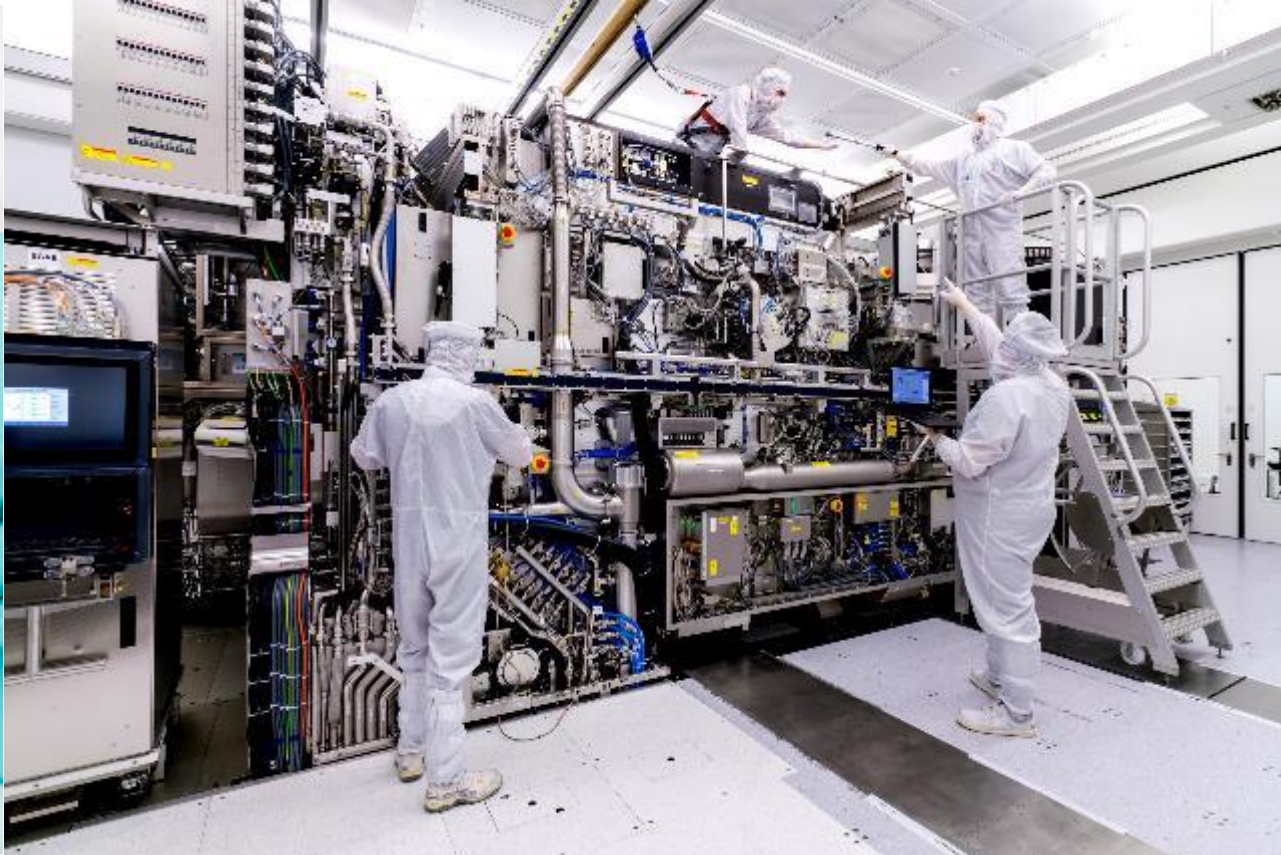
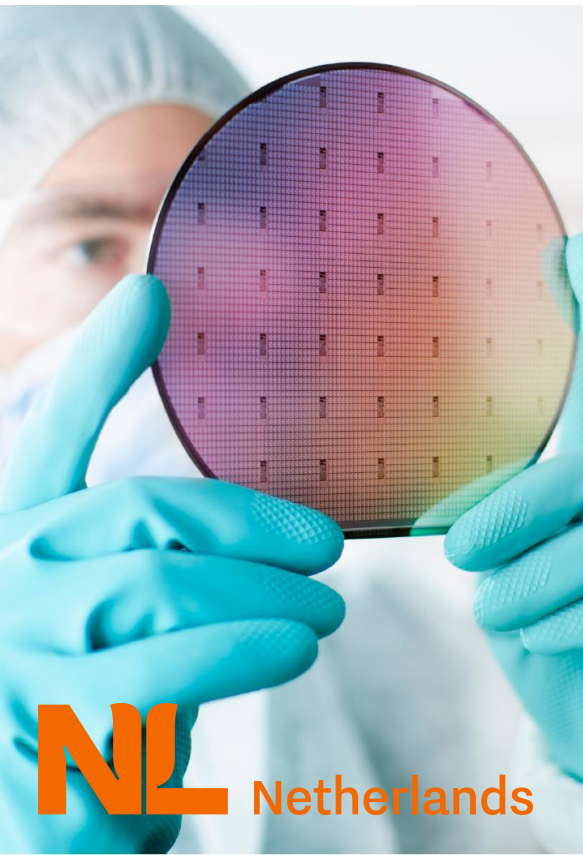




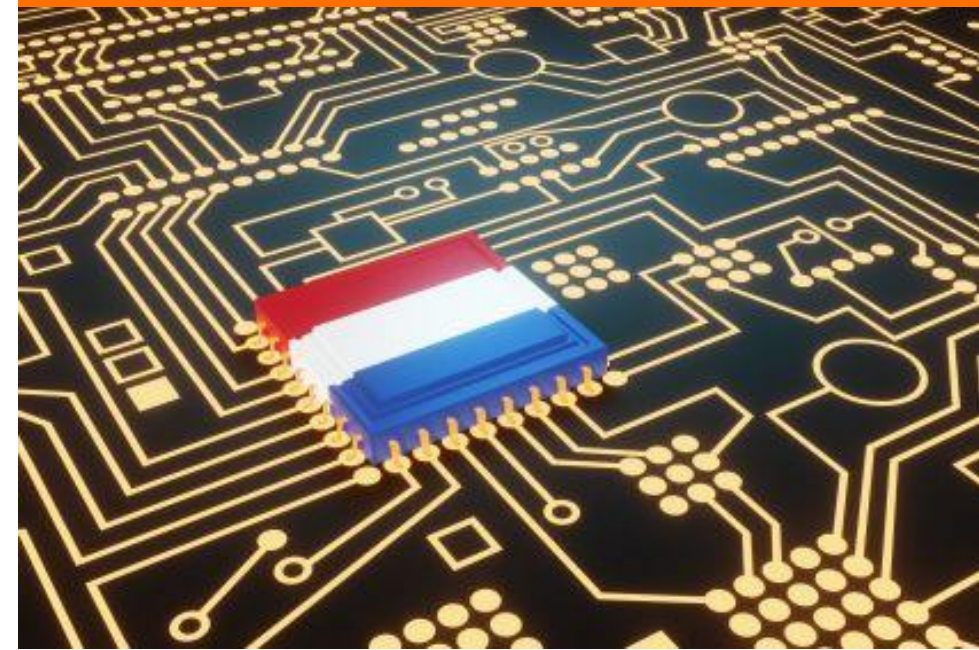
The Netherlands Deeptech Semiconductor Industry

Japan, June 2023



CONTENT

1. The Ecosystem
2. Open Innovation
- 3.1 Dutch Strengths: Manufacturing Equipment
- 3.2 Dutch Strengths: Key components and equipment modules
- 3.3 Dutch Strengths: Chip Design
- 3.4 Dutch Strengths: Photonics
- 3.5 Dutch Strengths: Quantum
4. Research and Education
5. The Dutch High-tech Campus Infrastructures





1. The Ecosystem



KEY FIGURES SEMICONDUCTOR INDUSTRY

The hotspot for semicon equipment and chip design

of all integrated circuits in all
electronic devices worldwide

85%

Is made on machines designed and
manufactured in the Netherlands

In the Netherlands

>50.000

highly skilled people are employed
within Semicon

Netherlands semicon generated

+32B euro

annual sales value*
4.3% of Dutch GDP



Dutch semicon equipment has

33%

global market share

A complete value chain
for semicon within a

200KM

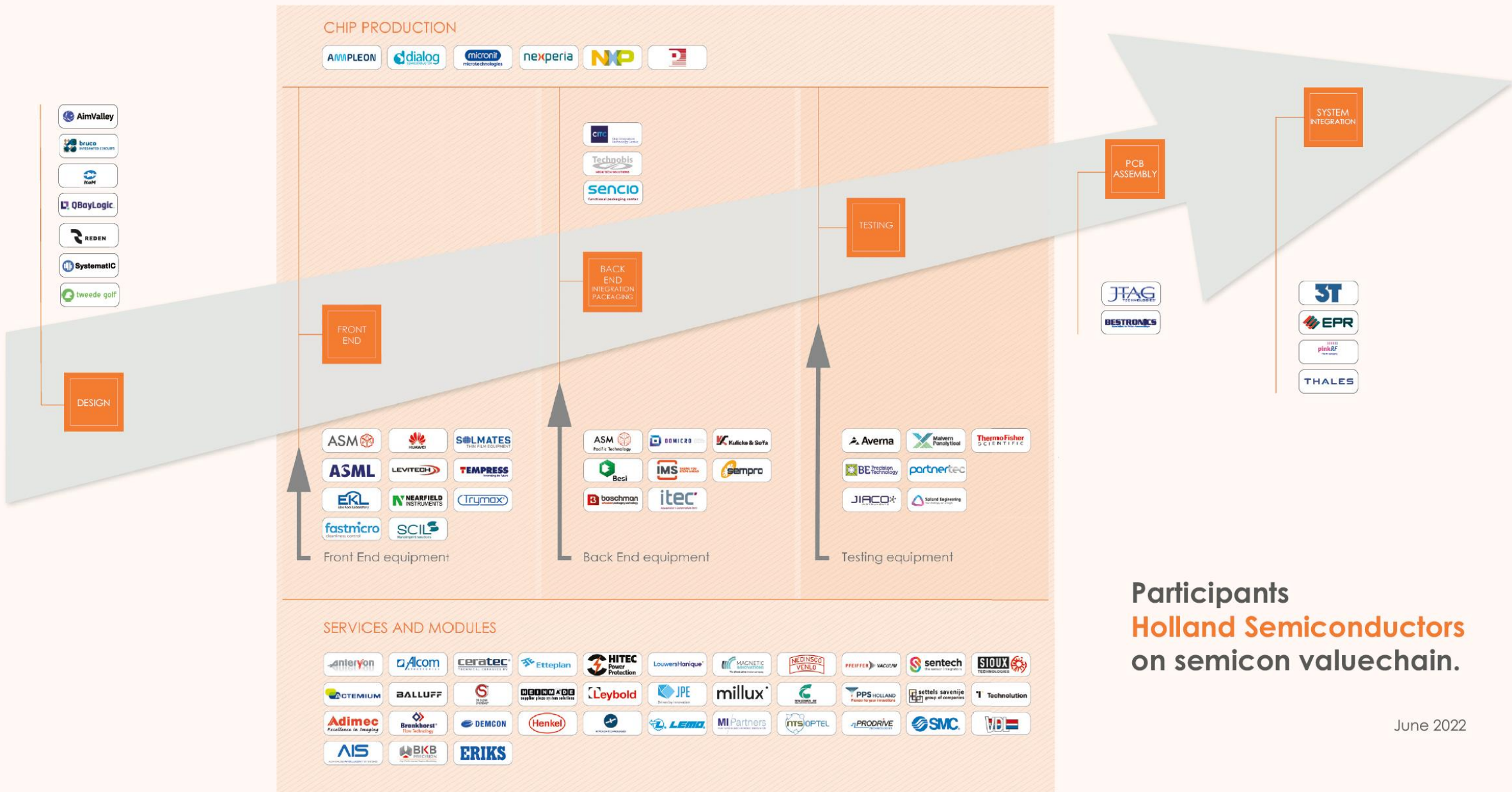
national radius.

+300 companies

world class semicon companies
including global leaders as

ASML and **NXP**

* With close collaboration between NL and IMEC, Silicon Photonics platform knowledge and value chain is easy accessible



Participants
Holland Semiconductors
 on semicon valuechain.