



# SUPPLY CHAIN MEETS

SEMICON West ITRS Keynote Panel  
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Presented by

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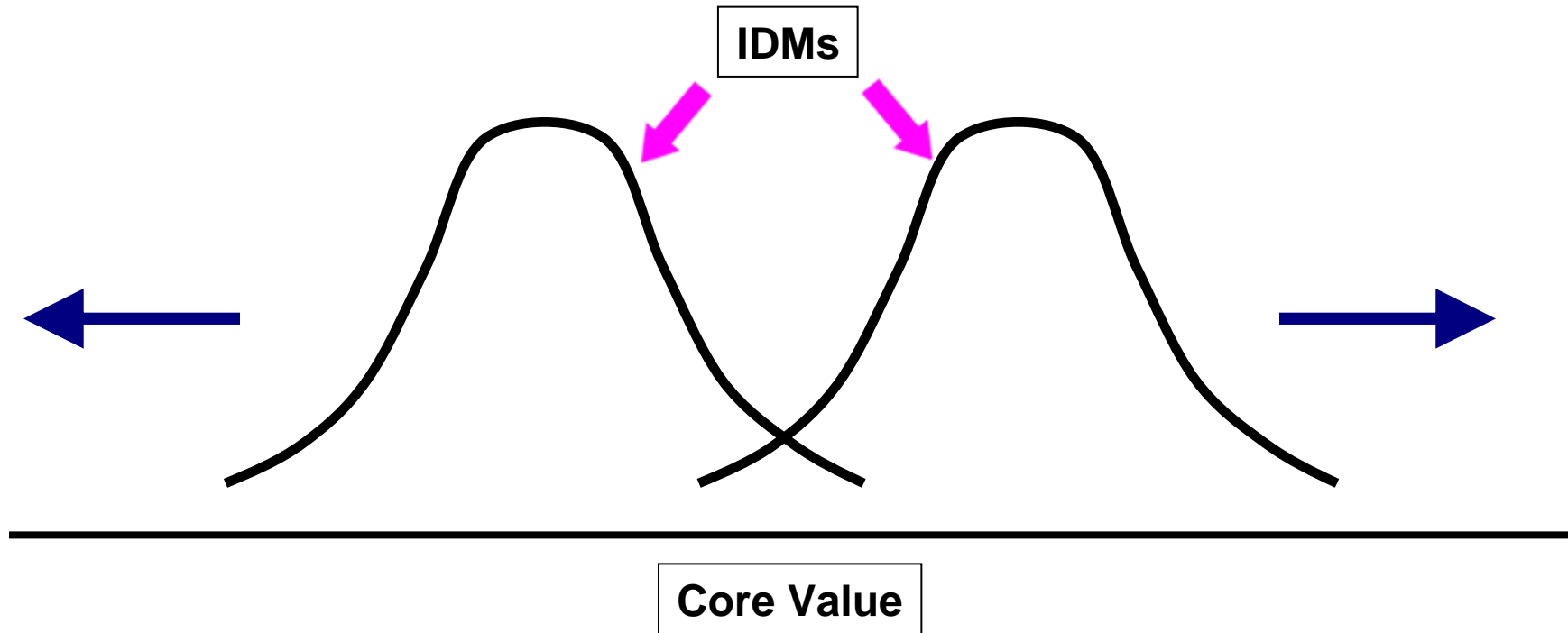


# Outline

- Polarization of Business Model
- Regional Balance
- Supply Chain Dilemma



# Polarization of Business Model



## Infrastructure

- Cost
- Economies of Scale
- Diversity of Clientele

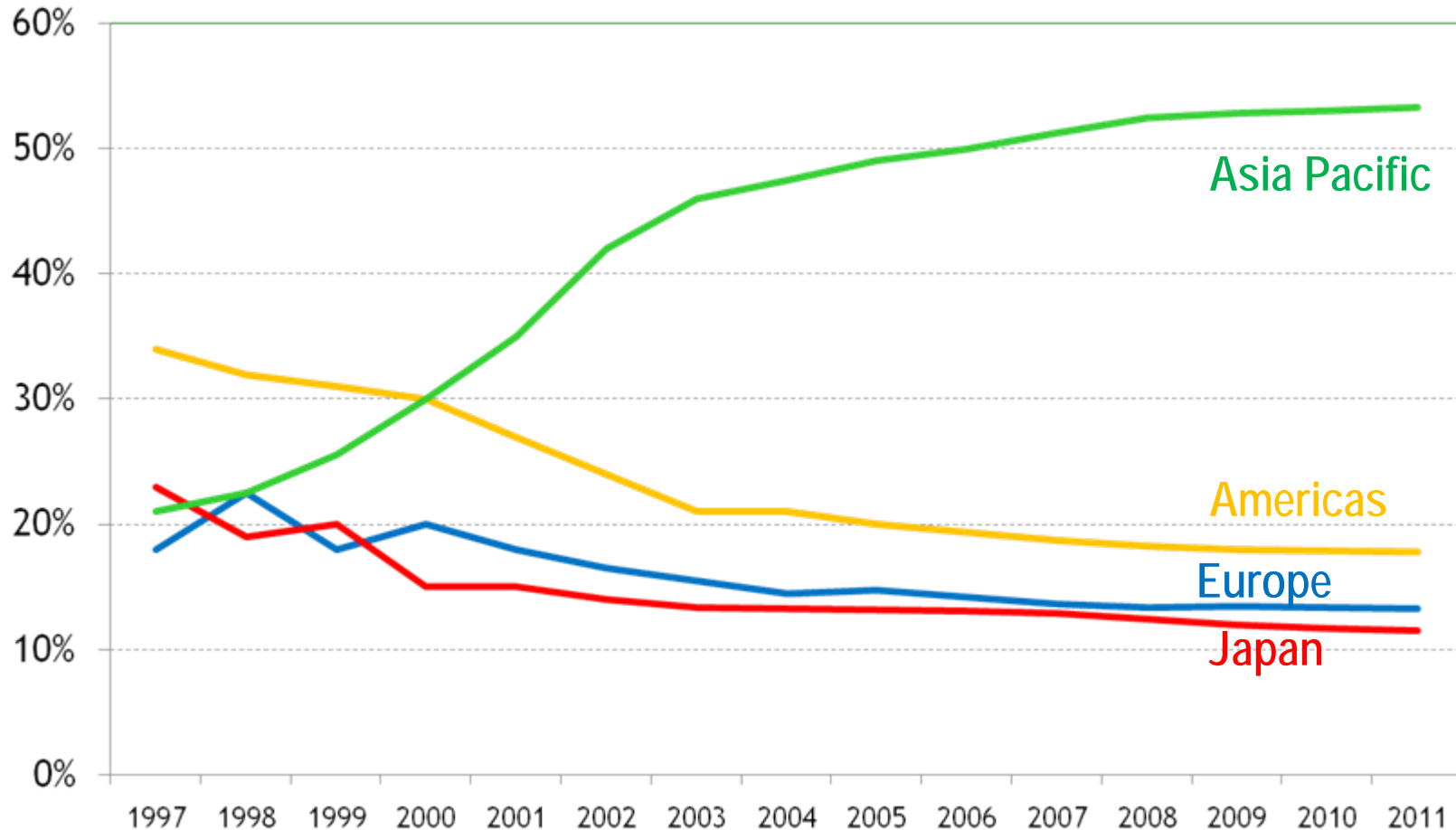
## Service IP

- Technology/Branding
- Localization
- System Integration



# Regional Balance

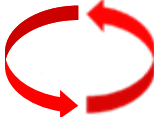
## (Semiconductor Manufacturing Consumption)



Source: Gartner Dataquest November 2008, Prismark 2008



# Supply Chain Dilemma

- Digital evolution meets economic limit:
  - True?
  - False?
- Missing DNA
  - Reliability
  - Liability
  - IP
- Conflict & Confusion  Collaboration
  - Margin Gap
  - Business Model
- Risk vs. Non-risk?



# Thank You

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