House Interim Committee on Economic Development and Small Business

Oregon Semiconductor Competitiveness Task Force Report

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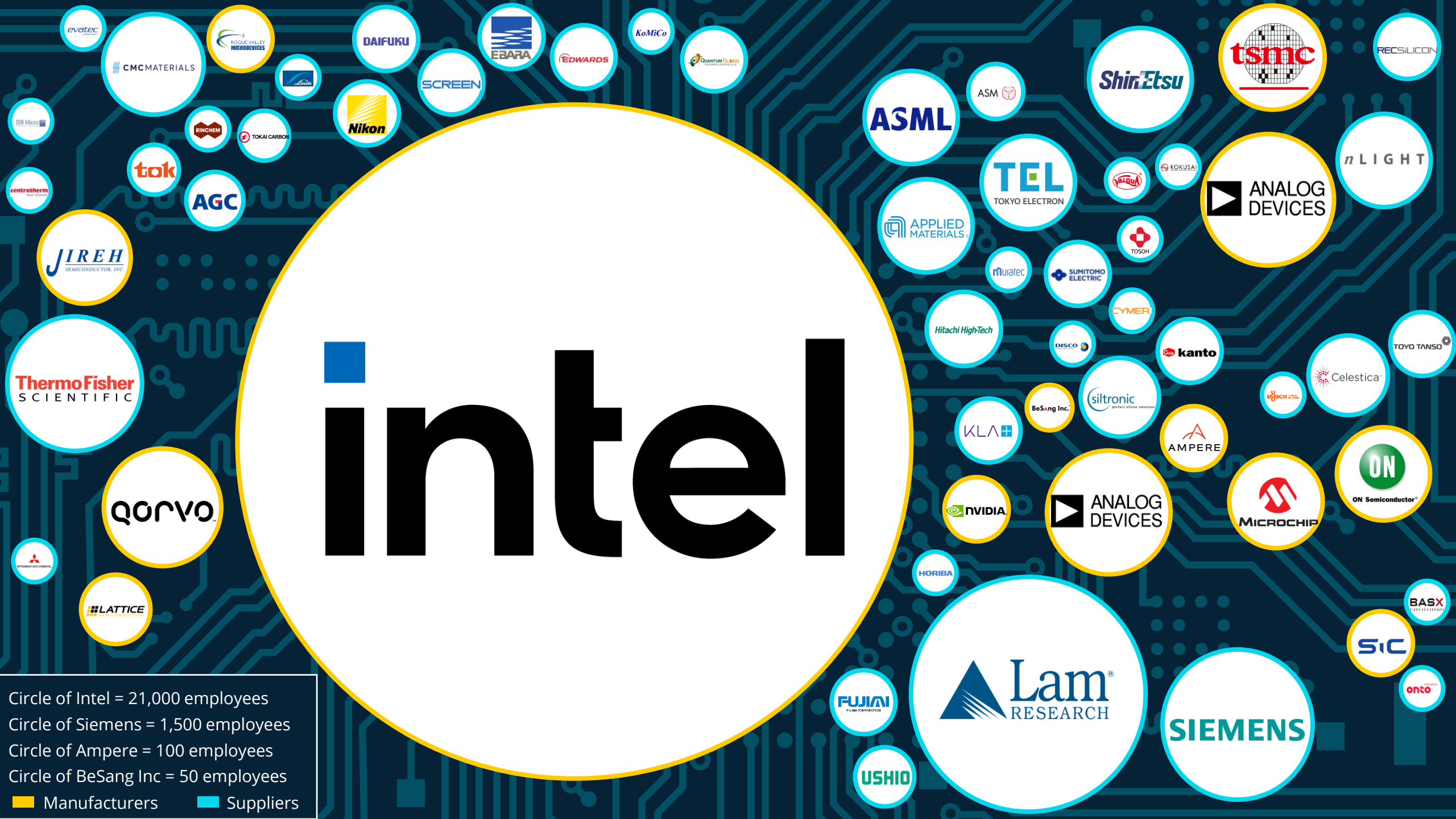
Task Force Charge

To build a strategy to win/attract Oregon's due share of the $280 billion semiconductor investment boom.

Semiconductor Competitiveness Task Force Members

Co-Chairs		
Ron Wyden	Senator	US Senate
Kate Brown	Governor	State of Oregon
Maria Pope	President & CEO	Portland General Electric

Task Force		
Rukaiyah Adams	Chief Investment Officer	Meyer Memorial Trust
Adrien Bennings	President	Portland Community College
Suzanne Bonamici	Congresswoman	United States House of Representatives
Sam Brooks	Founder & Chairman of the Board	Oregon Association of Minority Entrepreneurs
Steve Callaway	Mayor	City of Hillsboro
Robert Camarillo	Executive Secretary	Oregon Building Trades Council
Matt Chapman	Civic Leader	
Sophorn Cheang	Executive Director	Business Oregon
Monique Claiborne	President & CEO	Greater Portland, Inc.
Pat Daniels	Executive Director	Constructing Hope
David Drinkward	President & CEO	Hoffman Construction
Monica Enand	CEO & Founder	Zapproved
Ed Feser	Provost & Executive Vice President	Oregon State University
Tim Knopp	Republican Leader	Oregon Legislature
Jeff Merkley	Senator	US Senate
Mark Mitsui	President Emeritus	Portland Community College
Nagi Naganathan	President	Oregon Institute of Technology
Steve Percy	President	Portland State University
Lynn Peterson	President	Metro Council
Dan Rayfield	Speaker of the House	Oregon Legislature
Sue Richards	Global Head of Printing	HP
Curtis Robinhold	Executive Director	Port of Portland
Lisa Skari	President	Mt. Hood Community College
Travis Stovall	Mayor	City of Gresham


intel
Circle of Intel = 21,000 employees
Circle of Siemens = 1,500 employees
Circle of Ampere = 100 employees
Circle of BeSang Inc = 50 employees
Manufacturers
Suppliers
evatec
CMC MATERIALS
ROGUE VALLEY MICRODEVICES
DAIFUKU
EBARA
EDWARDS
KoMiCo
QUANTUM GLOBAL TECHNOLOGIES, LLC
SCREEN
Nikon
JSR Micro
RINCHEM
TOKAI CARBON
tok
AGC
centrotherm
JIREH SEMICONDUCTOR, INC.
ThermoFisher SCIENTIFIC
qorvo
MITSUBISHI GAS CHEMICAL
LATTICE SEMICONDUCTOR
ASML
ASM
Shin-Etsu
tsmc
RECSILICON
TEL TOKYO ELECTRON
APPLIED MATERIALS
VALQUA
KOKUSAI
ANALOG DEVICES
nLIGHT
TOSOH
Muratec
SUMITOMO ELECTRIC
CYMER
Hitachi High-Tech
DISCO
kanto
TOYO TANSO
Celestica
BeSang Inc.
siltronic
KLA
AMPERE
NVIDIA
ANALOG DEVICES
MICROCHIP
ON Semiconductor
HORIBA
BASX
SiC
onto
FUJIMI
USHIO
Lam RESEARCH
SIEMENS

15% share of nat’l investment

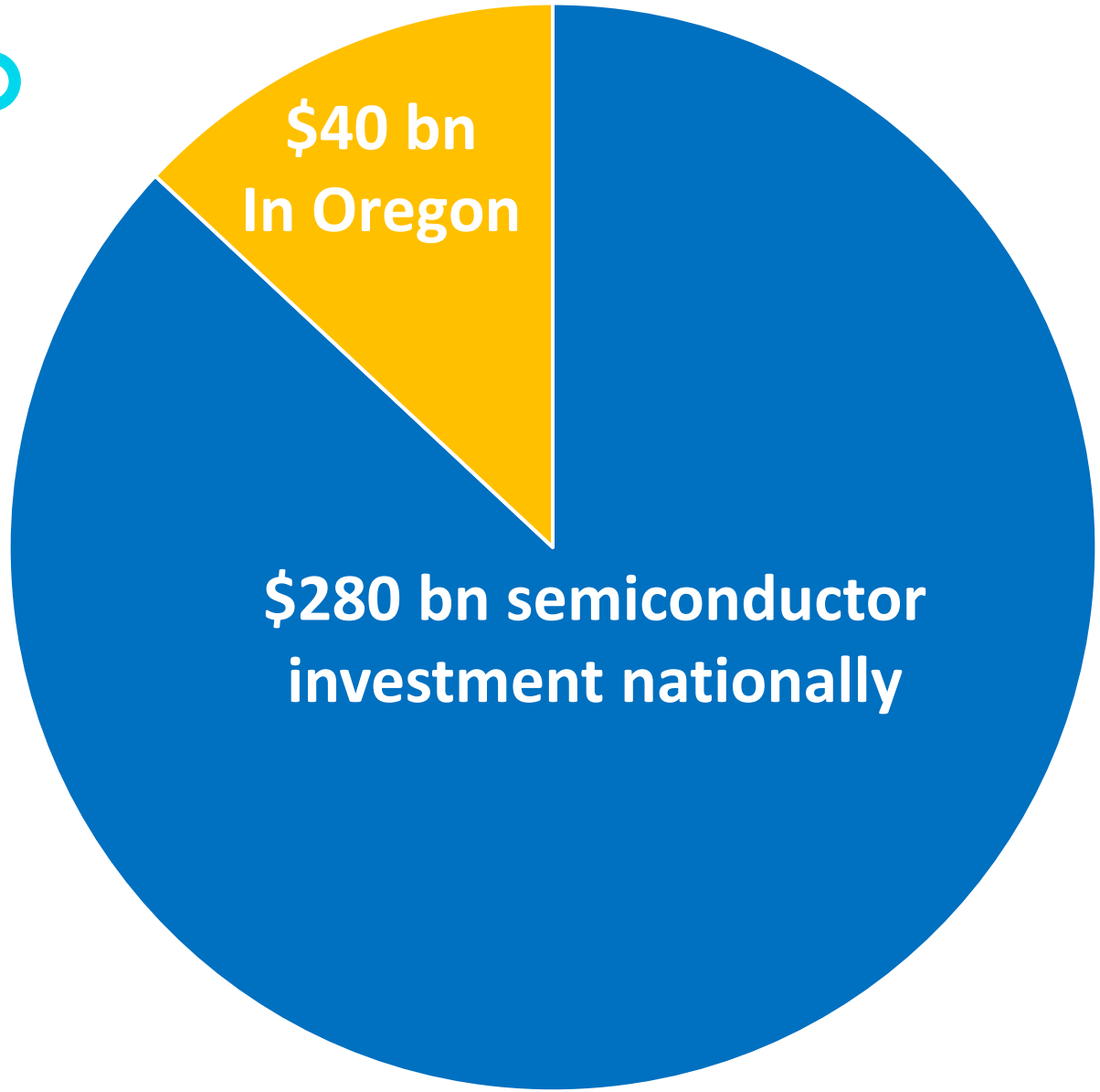


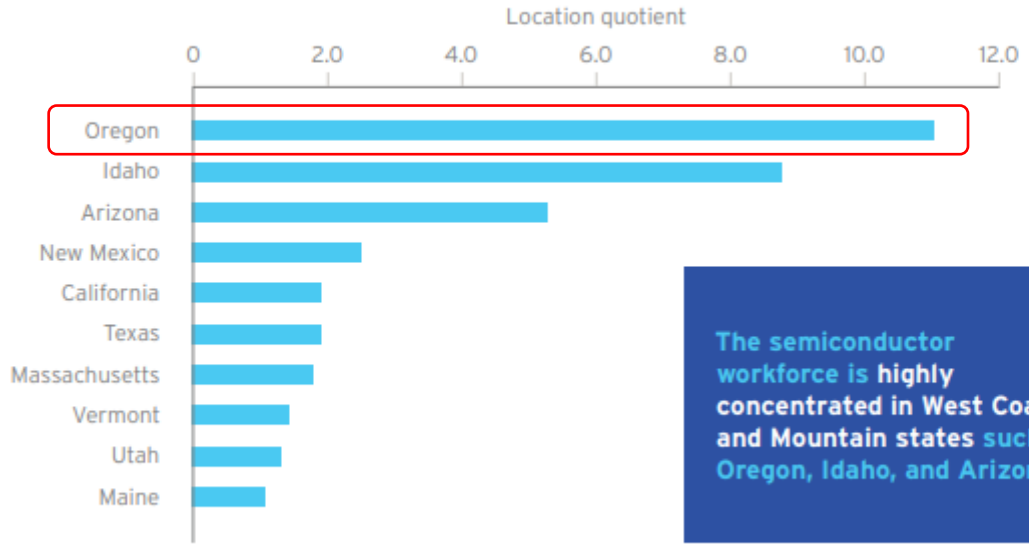
FIG. 7: Rank of top 15 semiconductor workforces by state

Rank	State	Semiconductor employment	Share of U.S. semiconductor employment	Rank	State	Semiconductor employment	Share of U.S. semiconductor employment
1	California	63,300	23%	9	North Carolina	7,900	3%
2	Texas	43,800	16%	10	Washington	5,000	2%
3	Oregon	40,300	15%	11	Virginia	4,100	1%
4	Arizona	28,900	10%	12	Ohio	4,000	1%
5	Florida	12,900	5%	13	New Mexico	4,000	1%
6	Idaho	12,300	4%	14	Utah	3,700	1%
7	Massachusetts	12,200	4%	15	Pennsylvania	3,300	1%
8	New York	10,200	4%				

Source: Oxford Economics

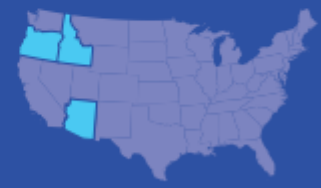
SIA SEMICONDUCTOR INDUSTRY ASSOCIATION | OXFORD ECONOMICS

FIG. 8: Top states by workforce location quotients (LQ)



Source: Oxford Economics

The semiconductor workforce is **highly concentrated in West Coast and Mountain states** such as Oregon, Idaho, and Arizona.



What would $40bn be worth to our communities?

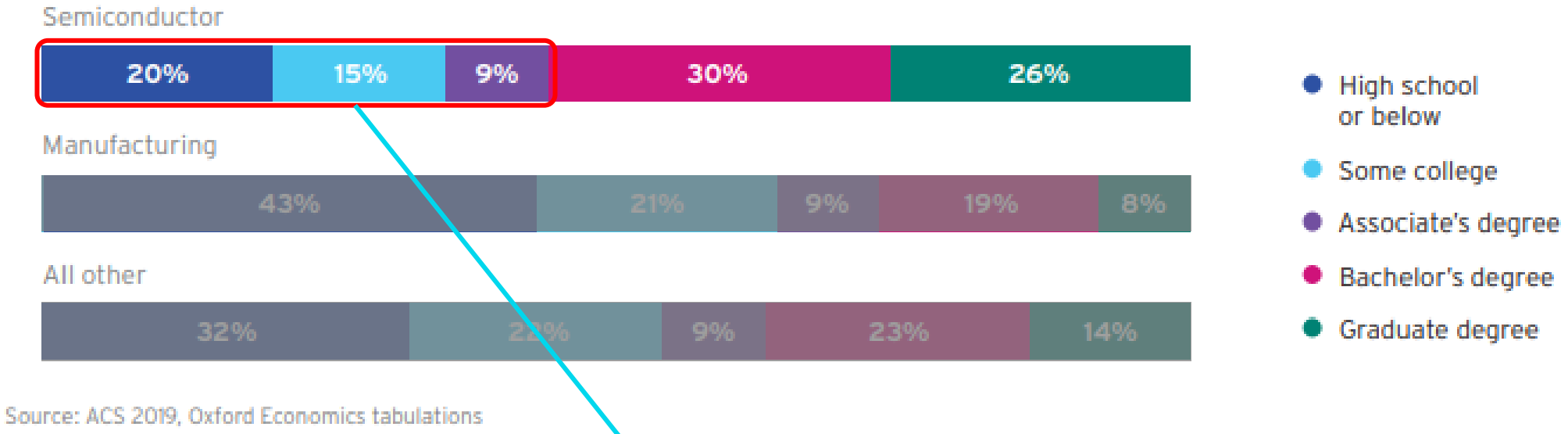
Per $1 billion in cap-ex

- 7,000 jobs (mostly construction-related)
- $44 million in state + local tax revenues

Per 2,000 permanent jobs

- An additional 4,000 jobs in related industries
- $56 million in *annual* state and local tax revenues from incomes

Broad Mix of Career Opportunities



Source: ACS 2019, Oxford Economics tabulations

Nearly half of semiconductor industry workers have HS or Community College degrees

Must Act Now

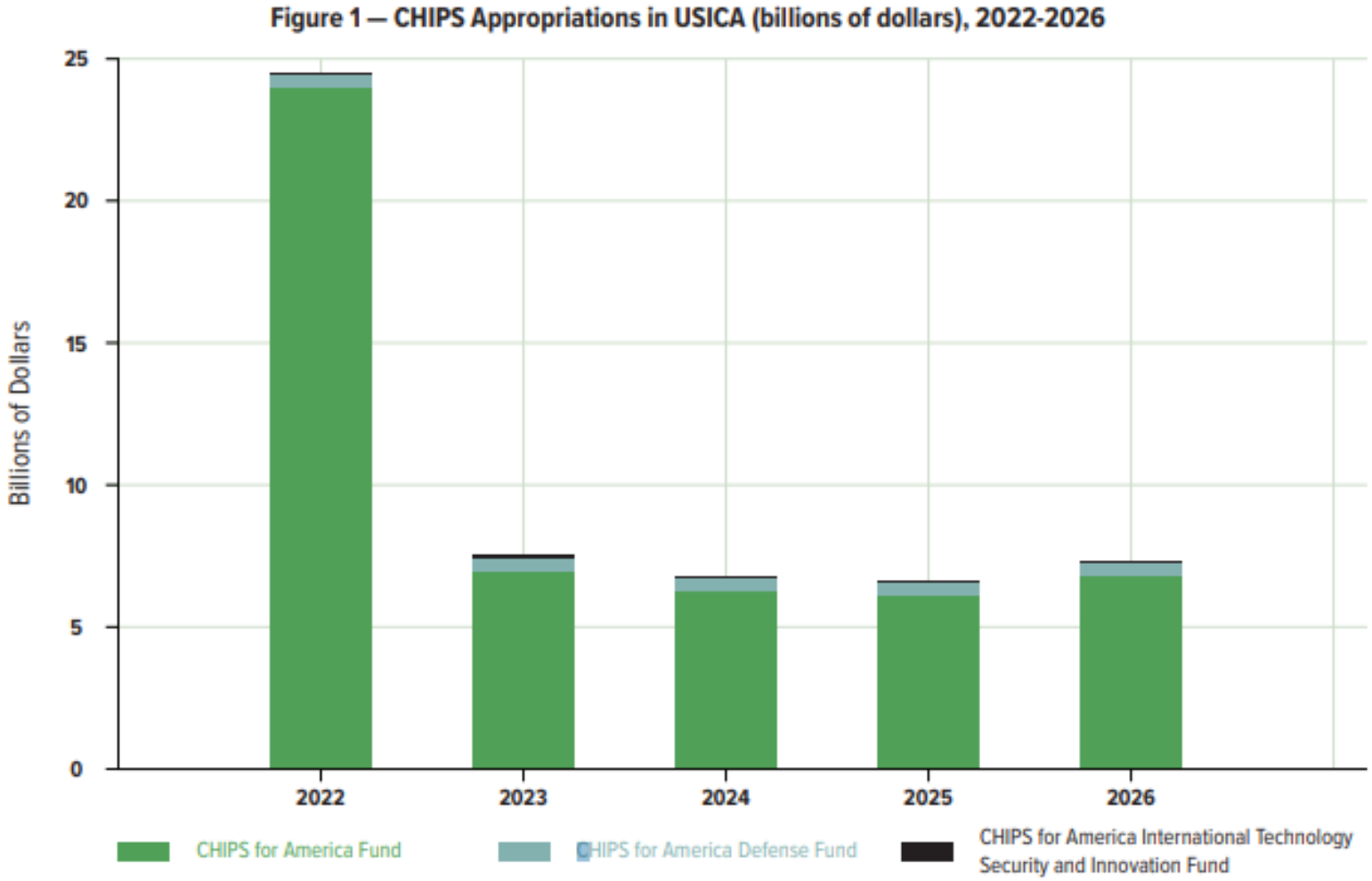
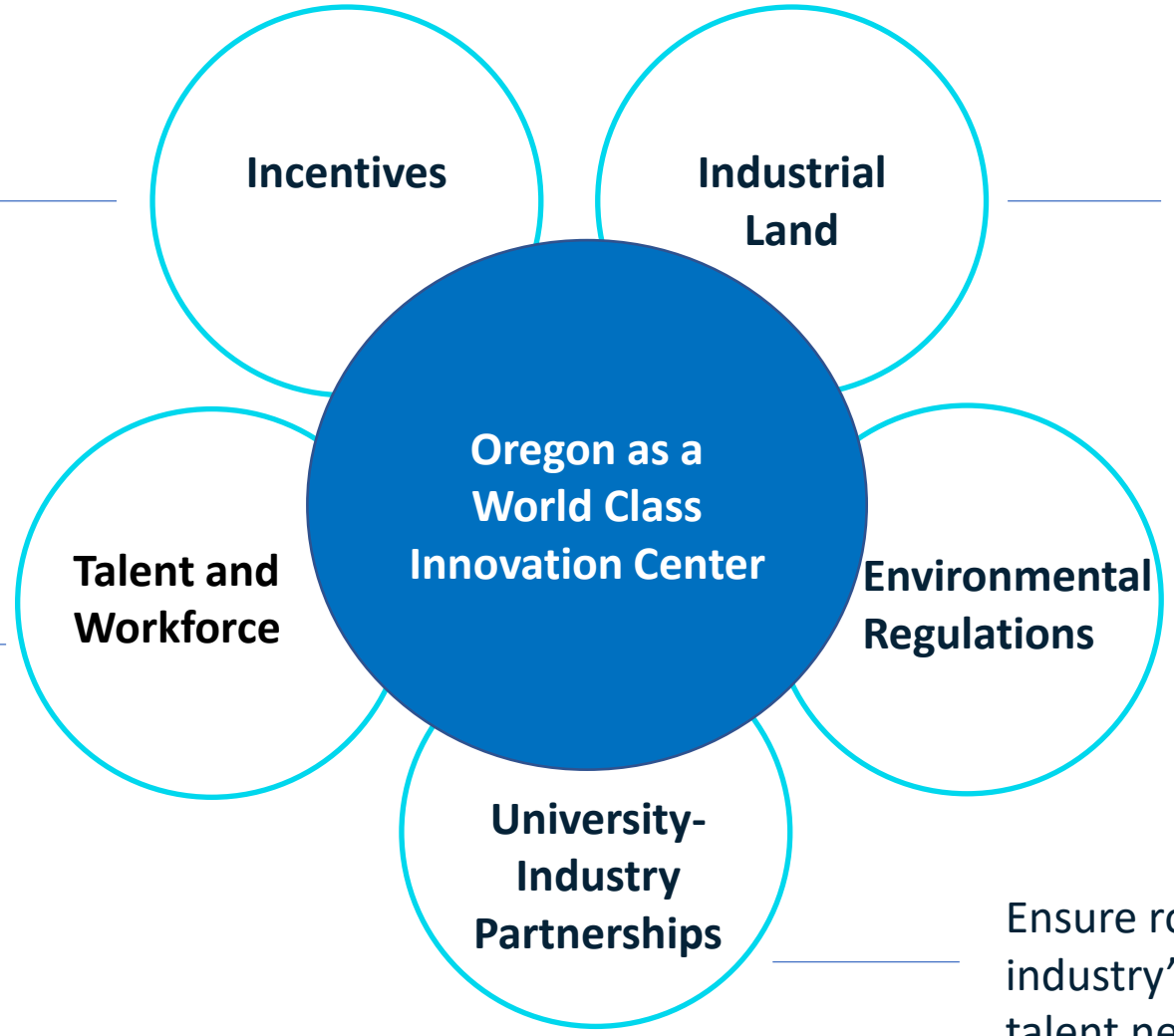


Figure 1 — CHIPS Appropriations in USICA (billions of dollars), 2022-2026
Billions of Dollars
25
20
15
10
5
0
2022
2023
2024
2025
2026
CHIPS for America Fund
CHIPS for America Defense Fund
CHIPS for America International Technology Security and Innovation Fund

How we'll be competitive: by building a world-class innovation ecosystem



Improve cost-competitiveness with other states

Ensure a strategic & responsive supply of sites that meet industry needs

Provide world class talent across the continuum that tightly matches industry needs

Meet environmental goals while providing certainty and speed in clean air permitting

Ensure robust collaboration to meet industry's research and advanced talent needs