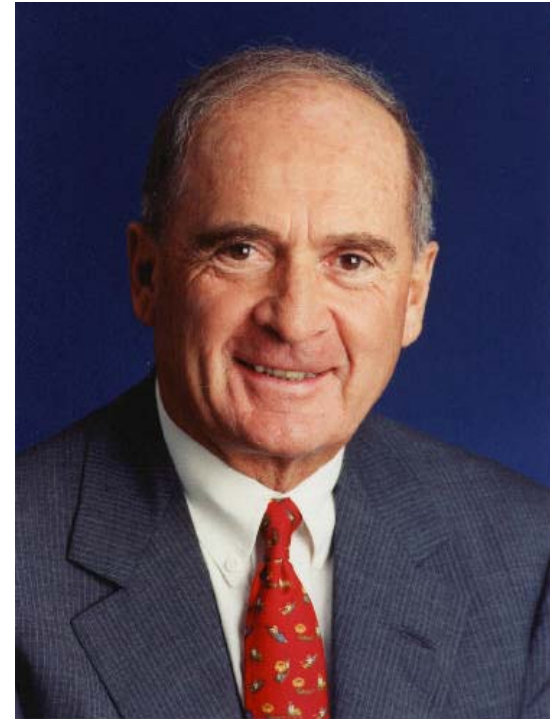


George Scalise
President
Semiconductor Industry
Association



New York, NY
March 13, 2009



Profile of U.S. Semiconductor Industry

2008 Sales = \$120 Billion

2008 World Market Share = 48% of \$249 Billion Market

U.S. Jobs = 200,000

Average Income = \$96,000

Percent of Sales Outside U.S. Market = 77%

R&D Investment = \$20 Billion, 17% of Sales

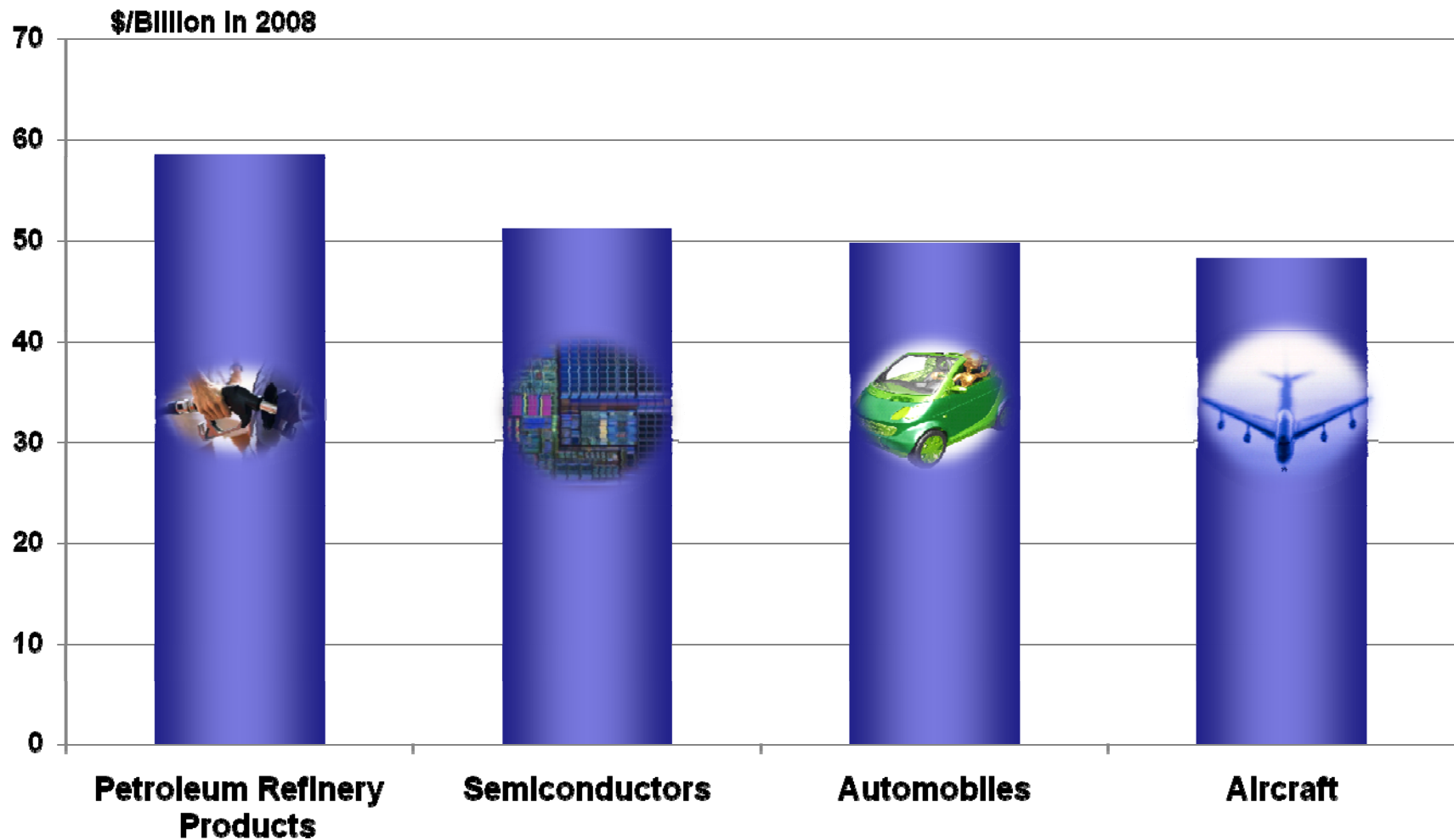
Capital Equipment = \$13 Billion, 11% of Sales

Historically about 25-30% of Revenues Invested in the Future

Source: SIA, U.S. DoL



Semiconductors are America's 2nd Largest Export



Source: U.S. International Trade Commission. Industry Defined By: NAIC Codes 336411 (Aircraft); 334413 (Semiconductors); 336111 (Automobiles); 324110 (Petroleum Refinery Products)



Semiconductors Have A Good Story To Tell

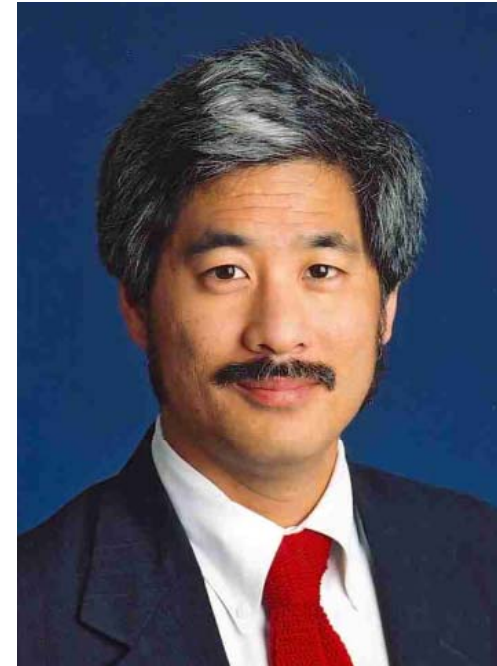
	Energy Efficiency Improvement 1978-2008
Auto	40 percent
Passenger Airlines	121 percent
Lighting	339 percent
Computer Systems	2,857,000 percent

Source: *Technology CEO Council, "A Smarter Shade of Green",
February 6, 2008.*



Daryl Hatano

**Vice President for Public Policy
Semiconductor Industry
Association**



**New York, NY
March 13, 2009**



Dr. Bernard Meyerson
VP for Strategic Alliances and
Chief Technology Officer
IBM Systems and Technology
Group



David Freeman
Engineering Manager and Senior
Fellow, Power Management Division
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Dr. Alain Kaloyeros
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