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Effective partnering and an outsourced service/process model needed in 2009

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Looking ahead to 2009, we believe the semiconductor market will continue further down the newly split paths as announced in the 2007 ITRS Roadmap. That is, there are now two distinct groups of device manufacturers: 1) The leading edge (scaling) -- "More Moore," with a focus on 300mm and larger wafers, and 90nm and smaller technology nodes; and 2) functional diversification/mainstream -- "More than Moore," with a focus on 200mm and smaller wafers, and 90nm and larger technology nodes. This functional diversification includes technologies such as analog, power, MEMS, nanotechnology, and photovoltaic, and often incorporates combinational technologies.

Both of these groups will continue to require unique support from equipment and material suppliers to address their very different needs. The challenge to support these needs will result in further partnering between the OEMs (who will focus primarily on "More Moore" toolsets) and third party partners who have an intimate understanding of the tools and processes to provide service, upgrade packages, and process development on the OEMs' behalf.

The other main area of growth is in semiconductor-related applications, such as MEMS, nanotechnology, photovoltaic, advanced packaging and TSV arenas. All of these sectors lend themselves very well to the type of outsourced process and service models that deliver proven process competencies allowing manufacturers to bring novel devices to market faster. Expanded demand for a traditional semiconductor manufacturing processes such as CMP and wafer surface conditioning is also coming from the areas of analog, power and mixed signal, which further creates new demand for outsourcing. We expect that the novel device rate of growth will be significantly higher than traditional CMOS, and this will create additional opportunity across the semiconductor manufacturing equipment industry, or at least with those companies with the flexibility to adapt to the demands of these different markets.

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