

Chips: A Rebirth For Semicon West With New Players

By Tom Foremski - July 24, 2009

[Matt Grimshaw is the Editorial Director of the Semiconductor Technical Journal; Future Fab International (www.future-fab.com). This week Matt writes about the Semicon West show for chip equipment makers. I remember when Semicon West used to be a huge show, it would regularly outgrow its venues.]

By Matt Grimshaw

Instead of reviewing the news this week I thought I'd try something different and just talk about my experiences at Semicon West; the semiconductor trade show that occurred last week.

Semicon West was, as has been commonly acknowledged by everyone in the media-sphere, much quieter this year than in those glory days of not too long ago, and by the way I'm talking about the Chip segment here not the jam packed Solar/PV exhibit.

Initially it was very sad to see how far the mighty had fallen; looking out across the vista of booths whilst coming down the escalator into the South hall the usual "fight for height" that had become the norm for decades with ever larger and more grandiose corporate logo's spinning, glowing or moving in a strange manner in order to gain attention in a crowded hall was very much muted.

Gone was the centerpiece of the South hall, the ever imposing Applied Materials booth which always used to crane above those booths around it in an intimidating fashion, almost daring it's neighbors to cross it's boundaries and pick a fight.

In its place was a modest spread of much smaller booths from generally smaller companies, many of which I'd never even heard of. In fact the whole layout of the show was totally different to that which I'd become accustomed over the last decade in which I've been attending.

The booths that were the regulars were for the most part gone or massively scaled back and in their place were a bunch of new companies that were starting the same battle for peoples attention that those that were absent from the party this year had started some 15-20 years ago.

The after show parties were scaled back to just a smattering every night and at some, they even ran out of hors d'oeuvres which in years past would have meant the prompt execution of whoever was in charge of organizing the party.

Everything about the show was less about showing off and more about value for money, barring the Solar hall of course which had the appearance of Semicon West of a decade or more ago; jammed with strange looking panels massive booths and the sort of giveaways that the Semiconductor industry used to be infamous for (I never did get one of those Novellus bouncy balls with LED's that I wanted so badly).

In truth the Solar/PV business appears to be in rude health despite the fact that they all rely on government subsidies to exist, as many will not be profitable in the traditional sense for quite a few years until the efficiency of the panels get much higher and manufacturing costs drop as I'm sure they will.

My one hope for that sector is that whoever notices a trend in manufacturing vs. cost vs. efficiency (or whatever will be the equivalent) has the common decency to have a name as PR friendly as Gordon Moore, whose law is oft quoted. It would be unfortunate in the extreme (not to mention a PR headache) should someone of the name; Dr. Elias Bulchitz offer a law of similar standing and popularity.

Since the show finished, I've been asked for my general opinion of this year's event a number of times and it's surprised me to no end just how positive my outlook really is, especially considering my view that it had become somewhat stagnant in recent years as it's no longer really a trade show; no one 'trades' anything and few people bring anything to 'show'.

There wasn't really a general buzz as there's been in the past, the noise was lower as was the foot traffic, but there was a sense of knuckling down and getting back to business...

I'm not sure if this is because of its lack of Bling this year, of which I've

never been a fan, or if it's just that it was nice to see the smaller companies and start ups take the centre stage for a change, but I had the best experience in at least 5-6 years meeting new people and those I already know and hearing about innovations and new ideas.

It was like there was a rebirth occurring, a phoenix from the ashes...lots of young upstart attitude and the technology equivalent of 'fight the power'.

I concentrated my time on meeting with this new group of upstarts looking to upend the status quo...companies with unfamiliar names, some new, some not so new; Replisaurus, Alchimer, Norcimbus, Semilab, Entrepix SAFC Hitech & Applied Seals North America (nothing to do with the other Applied).

Then there were the surprise chance meetings at the show like bumping into a company that I'd never heard of purely by chance called Confluense, but who's ideas could really shake up their sector.

There were of course meetings with more established companies like W. L. Gore & Assoc, & ASM that blew my socks off; in the cases of some I'd had no idea they were so prevalent in certain sectors and it was refreshing that old dogs COULD be taught new tricks (a lesson many should take onboard).

Where am I going with this you might ask? Put plainly; hope. Hope for the future of the chip industry, hope that the sky isn't falling, hope that the chip business will not cease to innovate and thereby cause the stagnation of all technology sectors.

It's true that these times are tough; Semicon West itself faces a fight for survival. However, if lessons are learned from this year's event (keep it simple, make it cheaper to attend, less about bling and more about people) and if the habits & excesses of the past can give way to the responsibility & realities of the present, prospects of the future and our joint responsibility to stop wasting money & resources, then there's no reason why an event like Semicon West can't survive and even thrive in the years ahead - it just needs to modernize and in the future do so before it's held to ransom by an economy that's so bad that being a bathroom attendant looks like a solid career move.

The same could be said of all media in the Semiconductor segment: Stop doing the same old thing and create something new... surely this is the lesson that history teaches us and indeed the foundation of the chip industry itself? Innovate your way out of trouble, but don't stop swimming for if you do then like a shark you will drown.