



Semiconductor Industry Ecosystem

July 2020

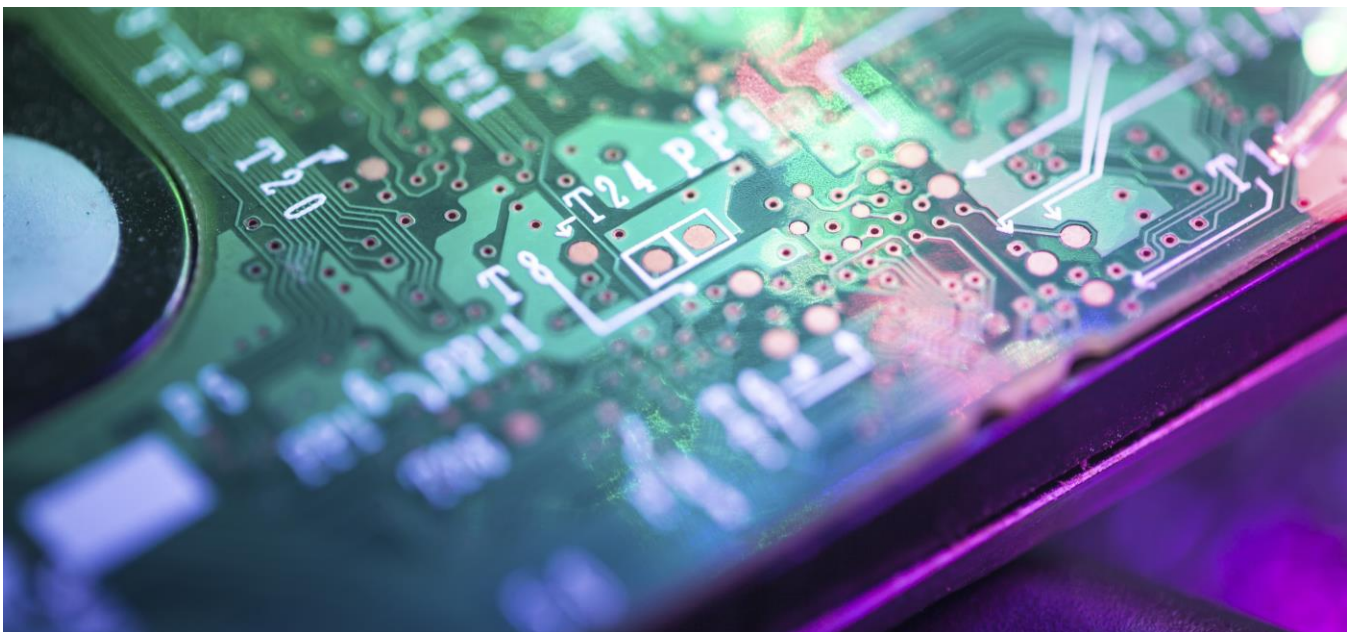
Develop Your Business in Greater Phoenix

One of the nation's most storied semiconductor hubs

Greater Phoenix is one of America's longest-standing semiconductor hubs. Motorola kicked off the region's microelectronics boom when it opened a research and development facility in Phoenix in 1949. Now 70 years later, Greater Phoenix has a thriving and diverse ecosystem that is home to research and development, manufacturing, and headquarters facilities for some of the most well-known companies in the industry.

Here are just a few reasons why semiconductor companies thrive in Greater Phoenix:

- Large and talented workforce
- Massive education pipeline developing workers with vital skills
- Faster commute times than peer markets ensuring easy access to a robust talent pool
- Competitive operating cost and tax environment with several available incentives
- More affordable cost of living for the employees, offering a better quality of life than peer markets
- Welcoming and supportive region with active trade associations and dynamic networking organizations



Value Proposition



Large Existing Cluster	Economic Development Programs	Robust Semiconductor Workforce	Exceptional Talent Pipeline	Competitive Operating Costs
<ul style="list-style-type: none"> • Home to some of the industry's largest & most influential players • Headquarters include: ON Semi, Microchip Technology, Amkor Technology, ASM America and others • Almost all firms have significant R&D operations in the region • Large network of suppliers in the region 	<ul style="list-style-type: none"> • Up to \$20,000/job in refundable tax credit • \$9,000 of corporate income tax credits per job • Additional depreciation • Sales tax abatement on electricity and natural gas • Sale tax exemptions for machinery and equipment • Foreign Trade Zone sites can reduce property tax by 73% 	<ul style="list-style-type: none"> • 100,000+ jobs in occupations relevant to semiconductors • Labor costs are tens of thousands dollar less per employee per year 	<ul style="list-style-type: none"> • 4,000+ graduates in semiconductor-related degrees at Arizona universities • Nearly 23,000 enrolled in engineering schools across Arizona • Over 30,000 total graduates from Arizona's largest universities 	<ul style="list-style-type: none"> • Operating costs up to 40% lower than competing markets • Right-to-work state • Substantially lower corporate income tax rates in Arizona

Industry Cluster

Industry Highlights

Industry-leading firms from across the cluster have critical operations in Greater Phoenix. Whatever the operation type, Greater Phoenix has demonstrated that it has the ecosystem to support microelectronics firms, both big and small.



Total Employment: 11,405 **Operations:** R&D, Manufacturing

Intel established a presence in Arizona in 1979, which has grown into the company's second largest site in the U.S. Since 1996, Intel has invested more than \$20 billion to build high-tech manufacturing capacity in Arizona. Each year, Intel spends more than \$500 million to support research and development into areas such as packaging and autonomous vehicles. In 2017, Intel announced they would be investing \$7 billion to complete construction of Fab 42, which will manufacture their 7-nanometer chips and create 3,000 jobs.



Total Employment: 1,953 **Operations:** HQ, R&D, Manufacturing

Headquartered in Chandler, Arizona, Microchip Technology is a spinoff of General Instrument that became fully independent in 1989. In addition to their headquarters location, Microchip Technology also has a wafer fab in Tempe.



Total Employment: 1,696 **Operations:** R&D, Manufacturing

NXP entered Greater Phoenix when it merged with Freescale Semiconductor, a Motorola spinoff, in 2015. NXP's facility in Chandler is a wafer fab, one of three operated by the company in the U.S.



Total Employment: 1,038 **Operations:** HQ, R&D, Manufacturing

Headquartered in Phoenix, ON Semiconductor was spun out of Motorola in 1999. ON has been at its Phoenix campus since 1952, both as a part of Motorola and as its own company. The headquarters campus houses sales, research & development, design, and marketing functions.

Industry Cluster

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► Benchmark

Total Employment: 670 **Operations:** HQ, Manufacturing

After announcing the relocation of their headquarters to Tempe in 2017, Benchmark Electronics also opened an Internet of Things Design Center focused on sensor design and wireless infrastructure. The company also has a manufacturing facility in Phoenix that is focused on circuit design and precision machining for semiconductors.



Total Employment: 332 **Operations:** HQ, R&D

Amkor Technology moved its headquarters to Greater Phoenix in 2005 and is now headquartered in Tempe after originally landing in Chandler. A leader in packaging and testing, Amkor does significant development work at its Tempe headquarters.



Total Employment: 296 **Operations:** R&D

Integrated Device Technology (IDT) operates one of its research and development centers in Tempe. At that facility, the company works on the development and design of proprietary, differentiated, high-performance, low-power analog and mixed-signal semiconductor products.



Total Employment: 280 **Operations:** R&D, Production

Infineon has two offices in Greater Phoenix, in Chandler and in Mesa. Its Chandler location performs research and development functions, while its Mesa location is a manufacturing facility that is home to a Gallium Nitride cleanroom.

Industry Cluster

Industry Highlights

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Total Employment: 150 **Operations:** R&D

Marvell Semiconductor's Greater Phoenix corporate office is in Chandler. Functions of the office include design, testing, and software development.



Total Employment: 129 **Operations:** R&D

Qualcomm has two locations in Greater Phoenix, in Chandler and Tempe. These offices perform research and development functions for the company.



Total Employment: 125 **Operations:** HQ, R&D, Wafer Bumping

Headquartered in Phoenix, FlipChip International is the largest bumping and wafer level service provider in North America. FlipChip's technology has been licensed by companies such as Amkor and Siliconware.



Total Employment: 98 **Operations:** R&D

Broadcom's Greater Phoenix office is in Chandler, where it performs research and development functions. The office focuses on engineering, software development and client services.

Industry Cluster

Industry Highlights

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Total Employment: 55

Operations: HQ, R&D, Manufacturing

Headquartered in Chandler, Everspin specializes in the design and manufacturing of magnetic RAM and spin-torque MRAM products. In addition to headquarters functions, the Chandler facility also houses research and development functions, and an integrated magnetic fabrication line.



Total Employment: 40

Operations: R&D

Cirrus Logic's Greater Phoenix office is in Mesa, where it undertakes software and algorithm development. The office also houses hands-on lab space.



Total Employment: 35

Operations: R&D

ARM opened its Chandler office in 2016 and focuses on research and development. A large portion of its Chandler staff is made up of engineers. At full build out, the office will house about 60 employees.



Total Employment: 12

Operations: Packaging and Testing

After originally starting in 1992 as a semiconductor equipment representative, the Tempe-based company pivoted to offering dicing services, package assembly, and other services.

Industry Cluster

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Total Employment: 76 **Operations:** HQ, Manufacturing

Sumitomo Chemical Advanced Technologies has its U.S. headquarters in Phoenix. This location is also home to epitaxial wafer production and other EPI/Grinding processes.



Total Employment: 55 **Operations:** HQ, R&D, Manufacturing

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Total Employment: 40 **Operations:** R&D

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Industry Cluster

Industry Supply Chain in Greater Phoenix

In addition to major semiconductor manufacturers, Greater Phoenix has a network of industry suppliers covering materials, chemicals and machinery necessary to keep operations going. Below are some of the suppliers operating in Greater Phoenix.



Talent Pipeline

Education Highlights

Arizona's institutions of higher education are training the semiconductor workforce of the future via innovative partnerships and high-quality engineering programs. More information about Arizona's talent pipeline is below.



Arizona State University

Total Enrollment: 72,709

Arizona State University (ASU) is committed to partnering with corporate, education and government organizations to produce a workforce. ASU has the largest engineering school in the nation, with over 20,000 students enrolled.



University of Arizona

Total Enrollment: 45,918

Located in Tucson, the University of Arizona offers a variety of engineering degrees including electrical and computer engineering, which is all about integrating emerging and existing systems to create, for example, new products for faster, safer computing; better healthcare; and more efficient energy systems.



Northern Arizona University

Total Enrollment: 31,057

Located in Flagstaff, Northern Arizona University offers a wide range of undergraduate degrees and minors across computer science, electrical engineering and informatics.

University	Type	City	Engineering Enrollment	Semiconductor Graduates	Total Graduates
Arizona State University	4-yr Public	Tempe	16,159	3,131	20,253
University of Arizona	4-yr Public	Tucson	3,928	896	6,917
Northern Arizona University	4-yr Public	Flagstaff	2,851	458	4,062
Total:	-	-	22,938	4,485	31,232

Talent Pipeline

Education Highlights

Not only are Arizona's institutions of higher education preparing the workforce of tomorrow, but Greater Phoenix is home to an array of coding schools and bootcamps. They supply the fast-growing demand for development talent in the region. Some notable examples are below.



General Assembly

With 20 schools worldwide, including one in Phoenix, the school offers a variety of coding and technology focused programs. From part-time to full-time, online and in person.

- Software Engineering
 - User Experience Design
 - Data Science
 - Python
 - JavaScript
-



Galvanize

Galvanize offers both full- and part-time curriculum in web development and data science. Immersive course offerings produce job-ready graduates.

- Full stack
 - JavaScript
 - Python
-



DevMountain

DevMountain is an industry-leading coding school with expert faculty who are passionate about sharing their craft and empowering the next wave of programmers, entrepreneurs, and designers.

- IOS development
- Salesforce development
- Software Quality Assurance
- User Experience Design
- Web development

Talent Pipeline

Arizona Advanced Manufacturing Institute

Located at Mesa Community College, the Arizona Advanced Manufacturing Institute (AzAMI) offers several programs to ensure the region has the necessary pipeline of talent for present and future companies. By partnering with leaders in the manufacturing sector, AzAMI can ensure programs meet the needs of the industry.

Program & Career Options

- Additive Manufacturing Processes
- Aerospace Manufacturing Technology
- Automation & Robotic Technology
- Electronics Technology
- Electrical/Mechanical Drafting
- Manufacturing Engineering
- Machinist Apprenticeship
- Welding Technology

Corporate Programs

Through a partnership with Boeing, AzAMI offers an eight-day Cable Harness Wiring Boot Camp. The program was developed with Boeing to ensure students learn the skills needed. Upon successful completion of the bootcamp, students are reimbursed the cost of tuition, receive an industry certification, and the opportunity to interview with aerospace companies in Greater Phoenix.

Partnerships



Labor Analysis

The table below shows the total number of jobs in relevant occupations in the selected metro regions.

Occupation	Phoenix	Dallas-Fort Worth	Portland	San Jose
General and Operations Managers	39,595	60,936	21,537	17,230
Software Developers, Applications	13,240	34,256	12,906	52,353
Software Developers, Systems Software	7,812	11,986	2,534	28,523
First-Line Supervisors of Production and Operating Workers	7,295	13,439	4,736	3,173
Inspectors, Testers, Sorters, Samplers, and Weighers	6,302	15,800	3,946	5,158
Computer and Information Systems Managers	6,139	9,016	4,548	14,000
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	3,972	11,198	4,524	9,374
Electrical Engineers	3,241	4,965	2,577	5,371
Industrial Engineers	3,098	7,122	3,608	5,052
Mechanical Engineers	2,955	5,963	3,700	4,798
Architectural and Engineering Managers	2,636	4,181	3,307	5,762
Industrial Production Managers	2,463	3,486	1,782	2,053
Electrical and Electronics Engineering Technicians	2,444	3,064	3,212	5,483
Industrial Engineering Technicians	2,154	2,022	1,192	523
Computer Hardware Engineers	1,202	999	1,356	8,472
Semiconductor Processors	1,028	1,477	4,050	1,589
Materials Engineers	926	647	527	562
Electrical and Electronics Drafters	571	1,012	366	820
Total	107,071	191,568	80,407	170,296

Labor Analysis

The table below shows median annual wages in relevant occupations in the selected regions.

Occupation	Phoenix	Dallas-Fort Worth	Portland	San Jose
General and Operations Managers	\$91,198	\$107,500	\$94,065	\$142,077
Software Developers, Applications	\$100,749	\$111,203	\$104,952	\$127,429
Software Developers, Systems Software	\$98,900	\$110,208	\$107,957	\$144,247
First-Line Supervisors of Production and Operating Workers	\$55,334	\$64,064	\$61,061	\$72,363
Inspectors, Testers, Sorters, Samplers, and Weighers	\$37,692	\$38,510	\$45,161	\$46,093
Computer and Information Systems Managers	\$135,549	\$150,238	\$129,227	\$189,058
Electrical, Electronic, and Electromechanical Assemblers, Except Coil Winders, Tapers, and Finishers	\$37,855	\$33,590	\$36,378	\$40,680
Electrical Engineers	\$101,724	\$98,731	\$90,975	\$126,573
Industrial Engineers	\$90,269	\$99,036	\$89,673	\$120,696
Mechanical Engineers	\$90,144	\$95,044	\$84,712	\$121,636
Architectural and Engineering Managers	\$132,706	\$148,516	\$133,552	\$182,536
Industrial Production Managers	\$93,686	\$110,284	\$97,111	\$131,914
Electrical and Electronics Engineering Technicians	\$62,913	\$66,376	\$61,613	\$64,156
Industrial Engineering Technicians	\$57,970	\$66,596	\$57,966	\$61,593
Computer Hardware Engineers	\$109,497	\$120,362	\$108,662	\$145,528
Semiconductor Processors	\$35,944	\$36,120	\$38,394	\$46,672
Materials Engineers	\$83,360	\$93,154	\$90,735	\$112,551
Electrical and Electronics Drafters	\$63,777	\$58,927	\$63,474	\$92,343

Operating Cost Analysis

Not only does Greater Phoenix have a thriving semiconductor ecosystem, it also offers operating costs lower than competing markets. Simply put, semiconductor businesses get more value in Greater Phoenix.

Assumptions

- \$6,000,000 personal property investment
- 40,000 square foot Suburban Class A, Lease
- Utilities (per month): Included in Lease
- 100 jobs (Bureau of Labor Statistics equivalent occupations)

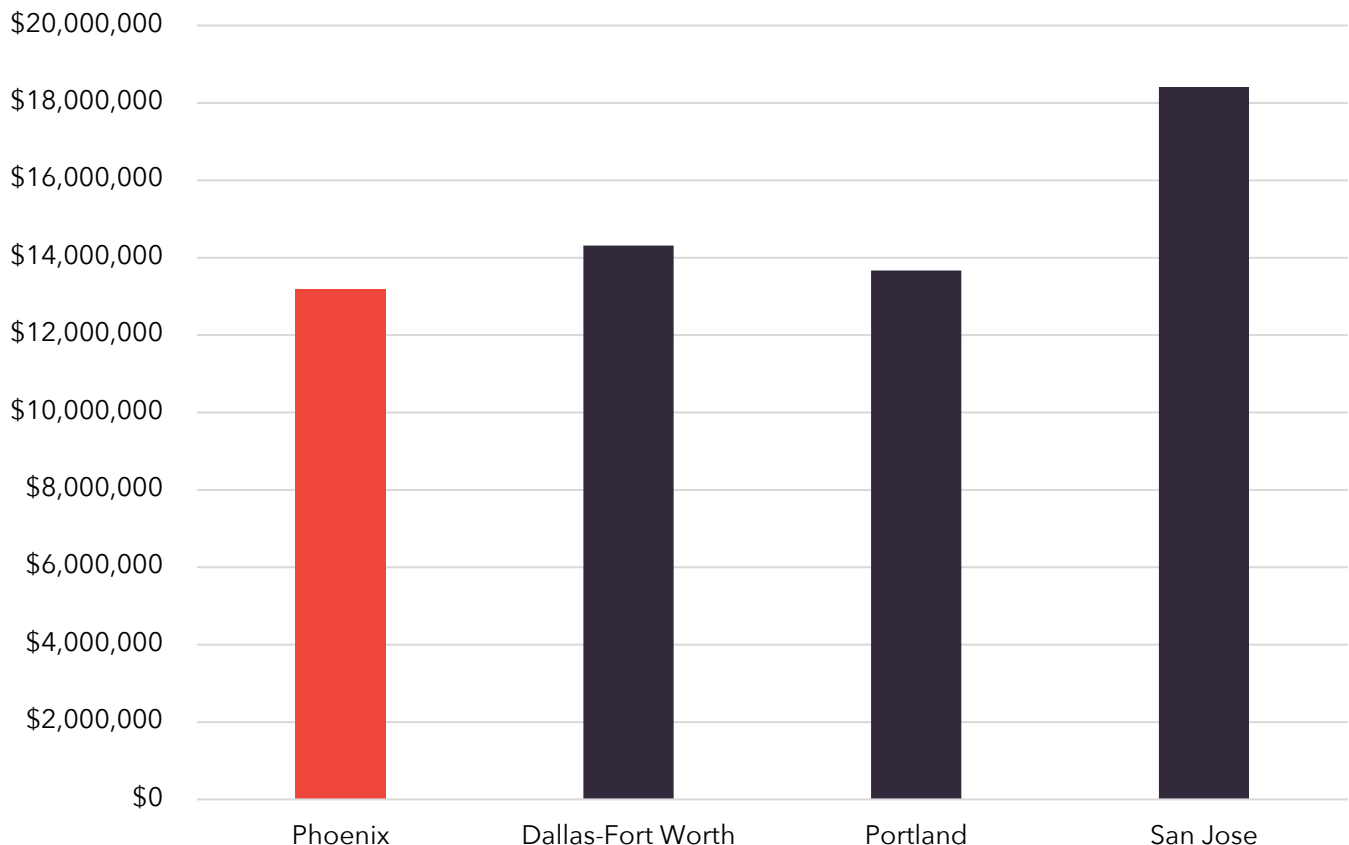
Occupations	Employment
Software Developers, Systems Software	25
Software Developers, Applications	25
Electronics Engineers, Except Computer	10
Electrical Engineers	10
Computer Hardware Engineers	10
Office Clerks, General	7
Industrial Engineers	5
Computer Systems Analysts	5
Network and Computer Systems Administrators	1
General and Operations Managers	1
Computer and Information Systems Managers	1
Total	100

Operating Cost Analysis

Not only does Greater Phoenix have a thriving semiconductor ecosystem, it also offers operating costs lower than competing markets. Simply put, semiconductor businesses get more value in Greater Phoenix.

Metro	Employee Payroll	Fringe And Mandated Benefits	Real Estate Payments	Property Tax	Total Operating Cost	Index
Phoenix	\$9,602,932	\$2,264,697	\$1,187,600	\$131,436	\$13,186,665	100.0%
Dallas-Fort Worth	\$10,435,324	\$2,458,812	\$1,250,400	\$170,700	\$14,315,236	108.6%
Portland	\$9,993,965	\$2,429,765	\$1,188,800	\$58,200	\$13,670,730	103.7%
San Jose	\$12,669,589	\$3,072,604	\$2,599,200	\$71,940	\$18,413,333	139.6%

Annual Operating Cost by Region



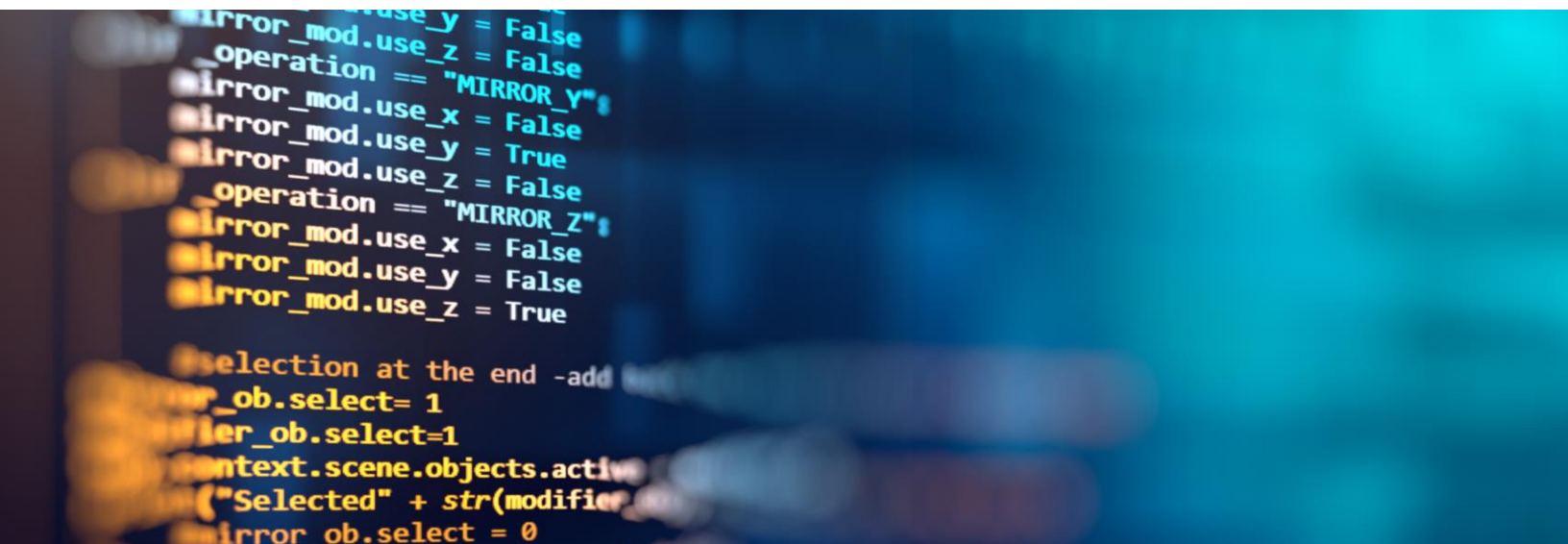
Operating Cost Analysis

Arizona Tax Environment vs. Competitor Markets

Arizona has a very competitive tax and mandated benefits environment compared to peer markets.

Metro	Sales Tax Rate	Corporate Income		Inventory Tax	Unemployment Insurance			Workers Comp. (Rate per \$100 Payroll)
		Tax Rate	Bases		Rate (as % of Payroll)	Wage Base	Max. Payment	
Phoenix	8.60%	4.90%	Net Income	No	2.00%	\$7,000	\$240.00	\$1.30
Dallas-Fort Worth	8.25%	0.75%	Taxable Margin	Yes	2.75%	\$9,000	\$521.00	\$1.21
Portland	0.00%	7.60%	Net Income	No	2.10%	\$42,100	\$790.00	\$1.15
San Jose	9.25%	8.84%	Net Income	No	3.40%	\$7,000	\$450.00	\$2.87

Source: Applied Economics Metrocomp Tool; Tax Foundation, 2020; Various state revenue departments, 2020; Oregon Dept. of Consumer and Business Services, "Workers' Comp. Premium Rate Ranking", 2018; U.S. DOL, "Significant Provisions of State Unemployment Insurance Laws", January 2020.



Statutory Incentives

Statutory Incentives

Even with the highly competitive tax environment in Greater Phoenix and Arizona, there are several tax incentives that can be utilized to mitigate operating costs. Some of the most relevant to the A&D industry are listed below. Please note that this is not a comprehensive list of all incentives available within the state of Arizona. Additionally, it should be noted that this document is only a guide for potential incentives. Actual incentives will depend on actual project parameters and varying program qualifications and requirements as determined by the Arizona Commerce Authority.

Quality Jobs Tax Credit

Quality jobs provides tax credits to employers creating a minimum number of net new quality jobs and making a minimum capital investment in Arizona. The Quality Jobs Tax Credit offers up to \$9,000 of Arizona income or premium tax credits over a three-year period for each net new quality job. The tax credit is equal to \$3,000 per qualified employment position, employed for each full taxable year of continuous employment for three years. If the allowable tax credit exceeds the income or premium tax liability, any unused amount may be carried forward for up to five consecutive taxable years. Employers must cover 65% of employee health insurance premium costs. Additional program qualifications are listed below.

\$9K

\$9,000 corporate income tax credits per job (\$3,000/employee/year)

10K

Capped at 10,000 jobs per year

65%

Employer must offer to pay at least 65% of employee health insurance premium

Urban

Min. New Jobs	County Median Wage	Maricopa	Min. Capex
25	100%	\$37,352	\$5,000,000
25	125%	\$46,690	\$2,000,000
25	150%	\$56,028	\$1,000,000
25	200%	\$74,704	\$500,000

Rural

Min. New Jobs	County Median Wage	Pinal	Min. Capex
5	100%	\$35,477	\$1,000,000
5	125%	\$44,346	\$500,000
5	150%	53,216	\$100,000

Statutory Incentives

Qualified Facilities Refundable Tax Credit

- Targets manufacturing facilities, including those focusing on research and development or headquarters locations
- Offers refundable income tax credit equal to the lesser of:
 - 10% of the qualifying capital investment, or
 - \$20,000 per net new full-time employment position at the facility, or
 - \$30,000,000 per taxpayer
- Requires wages of greater than 125% of the state median wage for production occupations (\$42,614)
- At least 65% of benefits package covered by employer
- Minimum investment of \$250,000

Military Reuse Zones (MRZ)

- Established in 1992 to minimize the impact of military base closures, both Arizona-designated MRZs are in Greater Phoenix: Phoenix-Mesa Gateway and Goodyear Airports. Businesses located in MRZs are subject to the following benefits:
 - Transaction Privilege Tax Exemption - Exemption from transaction privilege tax on contracts for certain types of construction at an MRZ
 - Property Reclassification - Both real and personal property can be reclassified from Class 1 (18% assessment ratio) to Class 6 (5% assessment ratio), which may result in property tax savings of up to 72.2% for a period of five years

Foreign Trade Zones (FTZ)

- Designated areas where imports can be stored without full customs formalities
- In Arizona, property is reclassified from Class 1 to Class 6, lowering assessment ratio from 18 to 5%
- Property tax savings of up to 73%
- FTZ properties are eligible to claim additional depreciation on personal property to further lower tax liability

Additional Depreciation Factor

Companies can elect to use additional depreciation to fully depreciate their property more quickly. By using additional depreciation, a company's property will be valued at 25% of its scheduled depreciated value (25% * depreciation factor * property value) and 100% by year six (100% * depreciation factor * property value).

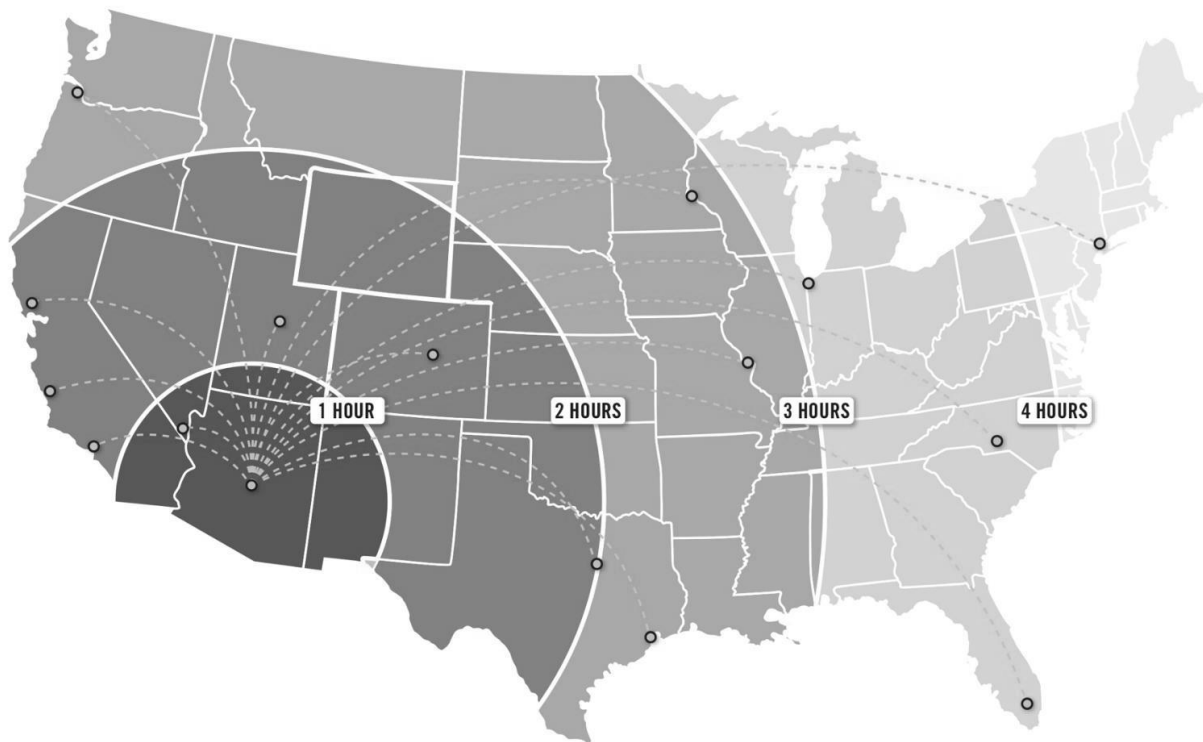
Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
25%	41%	57%	73%	89%	100%

Key Infrastructure

Greater Phoenix Airport Access

Skybridge at Phoenix-Mesa Gateway International Airport:

- An air logistics hub to ship high-value goods directly to consumers through a bonded facility incorporating Mexican and U.S. customs – will be the first of its kind in the interior U.S. for air freight activities.
- Ideally situated within the Southwestern U.S. to not only meet growing e-commerce and airport logistics demands in the Phoenix metropolitan area but also to serve as a direct carrier to and from consumers in Mexico and across the U.S.
- In addition, the proximity to ASU's Polytechnic Campus creates opportunities for partnerships to attract and retain workforce talent within Gateway.



Phoenix Sky Harbor International Airport:

- 43 million passengers annually
- 1,200 daily domestic and international flights
- Over 800 tons of cargo handled daily

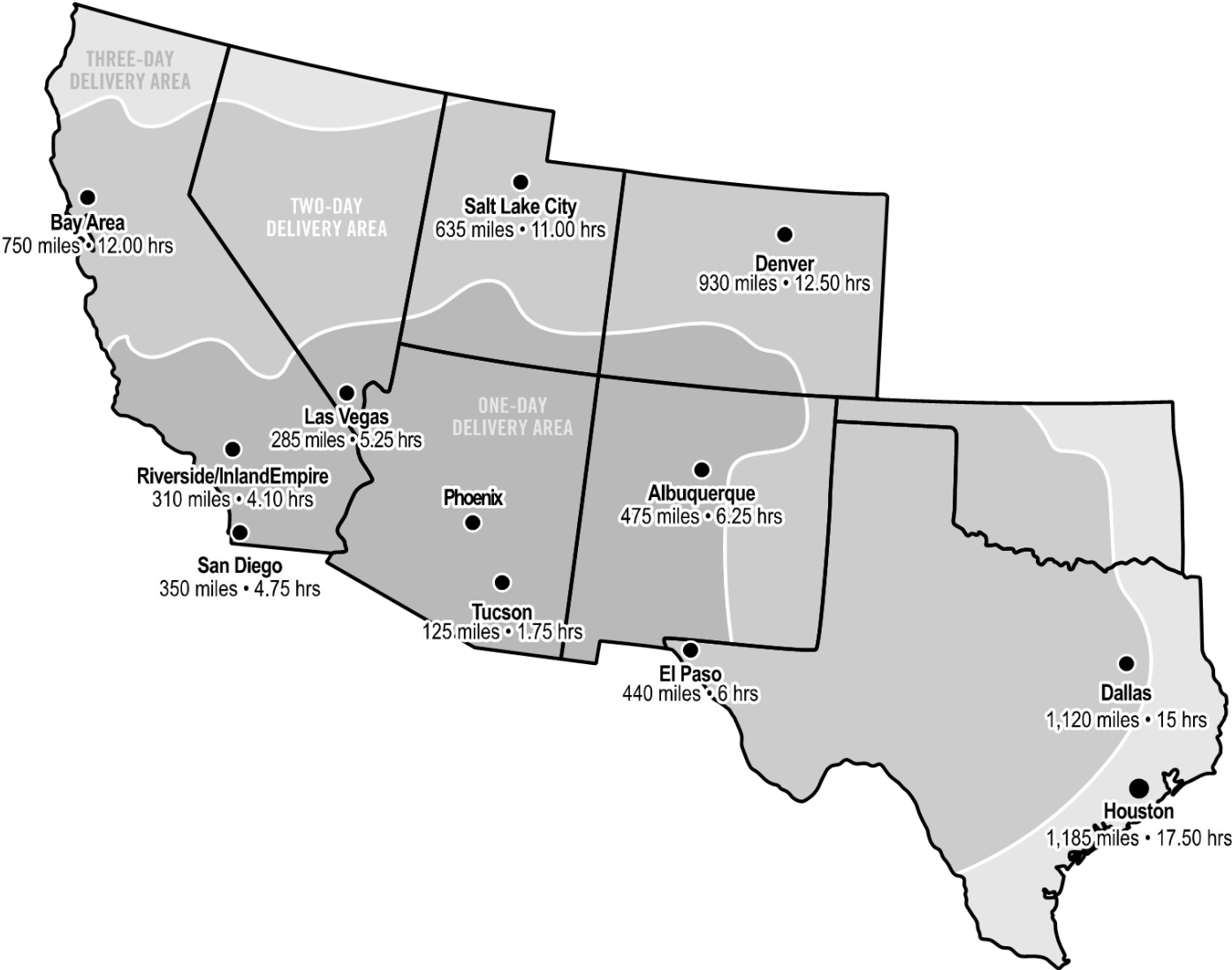
Major Cargo Carriers from Sky Harbor:

- | | |
|---------------------|----------------------|
| • Amazon Prime Air | • DHL |
| • American Airlines | • FedEx |
| • Ameriflight | • Southwest Airlines |
| • British Airways | • United |
| • Delta Airlines | • UPS |

Key Infrastructure

Greater Phoenix Market Access

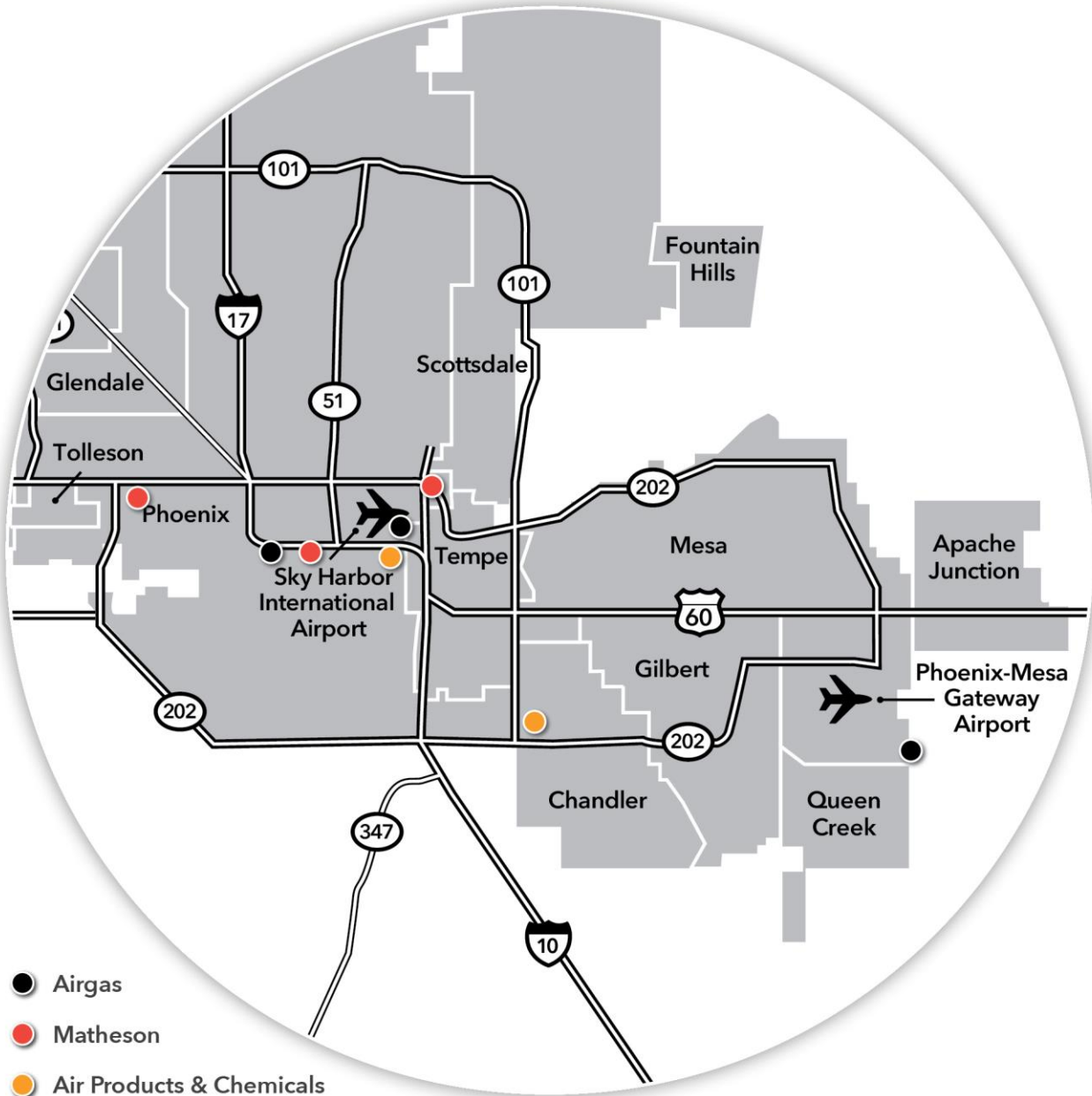
Greater Phoenix has access to more than 33 million people in seven states within a one-day truck haul, including major seaports in Los Angeles and Long Beach. Firms have access to nearly the entire Southwest within a two-day haul. Hauling is made easy thanks to easy access to Interstates 8, 10, 17, and 40.



Key Infrastructure

Industrial Gas Manufacturers

Greater Phoenix has a network of industrial gas manufacturers in the region available to meet the needs of manufacturing operations. The map below shows the location of the companies producing industrial gases.



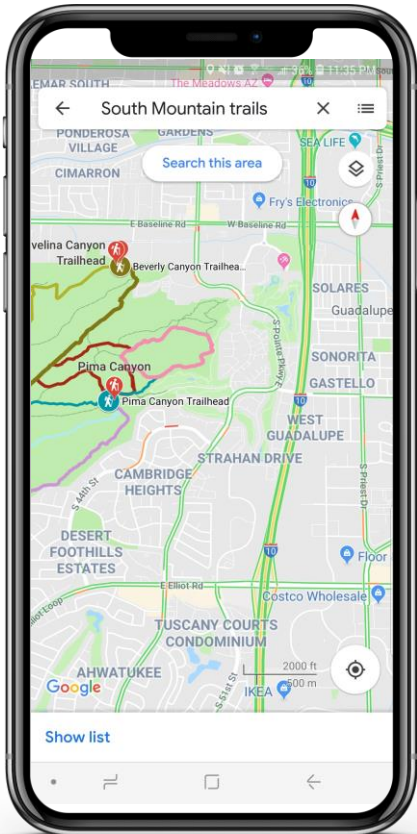


SEMICONDUCTOR ECOSYSTEM

Quality of Life

Parks & Recreation

Greater Phoenix is home to hundreds of parks and hundreds of miles of hiking, biking and walking trails. The region is home to the largest municipal park in the United States, South Mountain Park. South Mountain Park covers more than 16,000 acres. Other large parks in the region include the White Tank Mountain Regional Park, Camelback Mountain, Piestewa Peak and the Superstition Mountains. Notable walking trails in the region include the canal system, Tempe Town Lake, the Greenbelt and Papago Park.



Quality of Life

Cost of Living

Greater Phoenix is more affordable for companies and the people that make them successful. Across all major buckets of expenses, Greater Phoenix is less expensive than many peer markets.

Metro	Groceries	Utilities	Transportation	Health Care	Miscellaneous	Index	Local Index
Phoenix	94.9	107.0	100.6	87.2	92.6	100.9	100.0%
Dallas-Fort Worth	101.4	107.3	95.3	110.5	106.1	107.6	106.6%
Portland	113.3	88.6	133.2	117.9	118.5	134.3	133.1%
San Jose*	132.7	139.3	142.3	124.0	131.5	194.7	193.0%

*San Francisco cost of living data was used for San Jose.
Source: C2ER 2020 Q1 COLI Index

Housing

Greater Phoenix has an affordable housing market. It is significantly less expensive to own or rent in the Greater Phoenix area than in all or many peer markets.

Metro	Median Home Value	Index	Median Rent	Index
Phoenix	\$300,740	100.0%	\$1,463	100.0%
Dallas-Fort Worth	\$257,309	85.6%	\$1,547	105.7%
Portland	\$426,019	141.7%	\$1,603	109.6%
San Jose	\$1,200,523	399.2%	\$3,086	210.9%

Source: Zillow Home Value Index (ZHVI), May 2020; Zillow Rental Index (ZoRI), May2020

Rankings & Recognition

#1

Phoenix was ranked #1 Fastest Growing City by population in Business Facilities' 2019 Metro Rankings Report

#1

Arizona State University named America's Most Innovative University five years in a row by U.S. News & World Report

#3

Sky Harbor International Airport ranked third in the Wall Street Journal's "The Best of the Biggest Airports"

Top Tier

APS and SRP rank as top business service providers by J.D. Power and Associates for reliability

Top 10

In 2019, Arizona was ranked in the top 10 best states to start a business by WalletHub

Top 10

Greater Phoenix is ranked in the top 10 for low catastrophic and natural disaster risk

Top 20

In 2018, two cities within the region were listed in the top 20 happiest cities in the nation

Top 20

Arizona ranked in the top 20 states for doing business in 2019

Greater Phoenix Greater Together

People. Place. Technology.