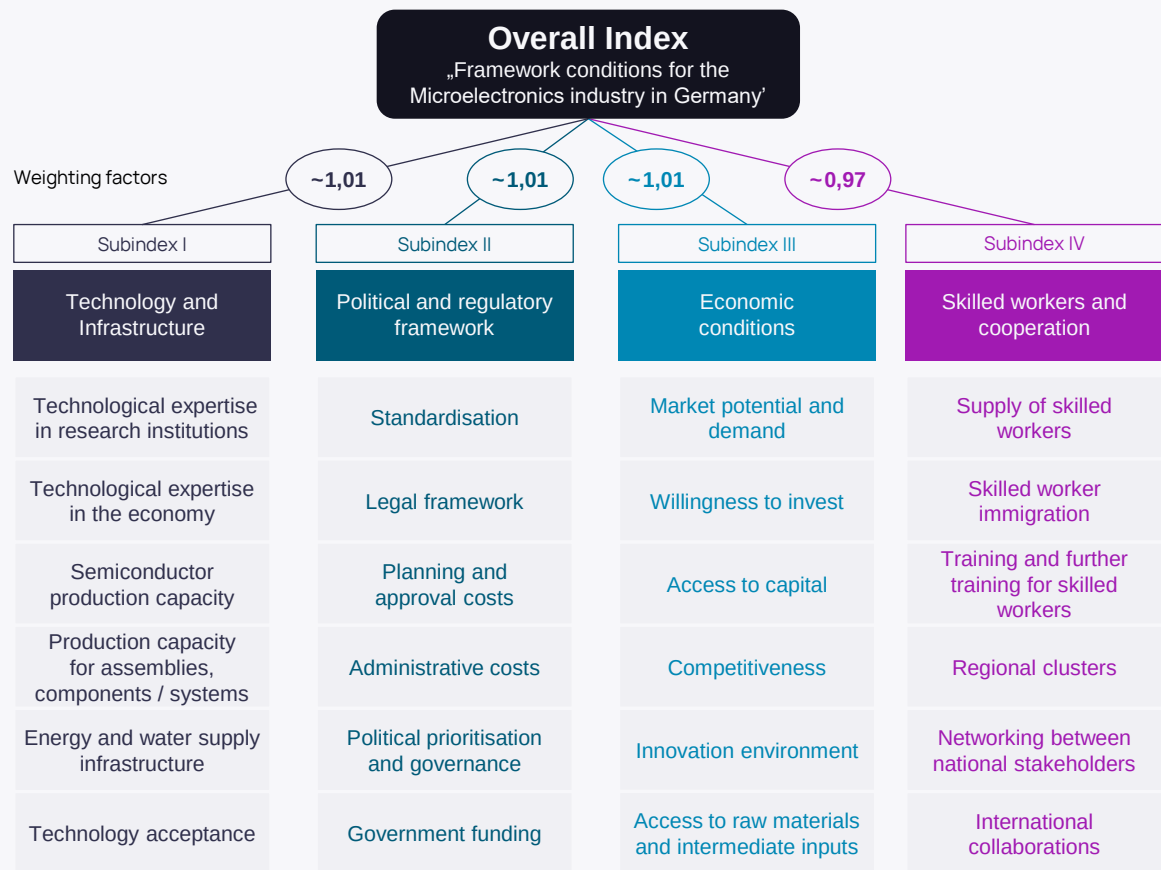


MICROELECTRONICS SENTIMENT INDEX 2025

JOCHEN KERBUSCH, LORENZ HORNPOSTEL, ANTJE ZEHM, MICHAEL NERGER

THE MICROELECTRONICS SENTIMENT INDEX 2025

- The Institute for Innovation and Technology (iit) uses the Microelectronics Sentiment Index to measure the operating conditions for the microelectronics industry in Germany.
- The index is based on a wide-ranging survey of experts: in addition to their assessments of the current state of technology and infrastructure, the stakeholders surveyed for the sentiment index evaluated the political and regulatory framework, current market conditions and market potential, as well as the availability of skilled workers and existing cooperation structures.
- The aim of the Microelectronics Sentiment Index is to highlight the current state and progress of the German microelectronics industry.



COMPOSITION & WEIGHTING

To calculate the index, respondents were asked to rate the framework conditions for the four thematic clusters in terms of their respective relevance to the Microelectronics industry on a scale of 0 to 20 (0 = not taken into account / 10 = single weighting / 20 = double weighting).

Calculated weighting factors:

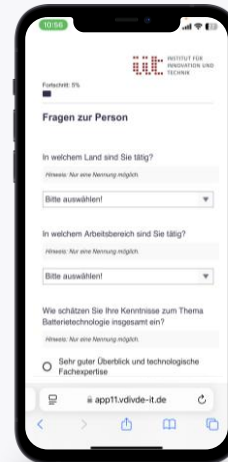
- Technology and Infrastructure: **~1,01**
- Political and regulatory framework: **~1,01**
- Economic conditions: **~1,01**
- Skilled workers and cooperation: **~0,97**

The weighting factors are dynamic and are recalculated in each round of the survey.

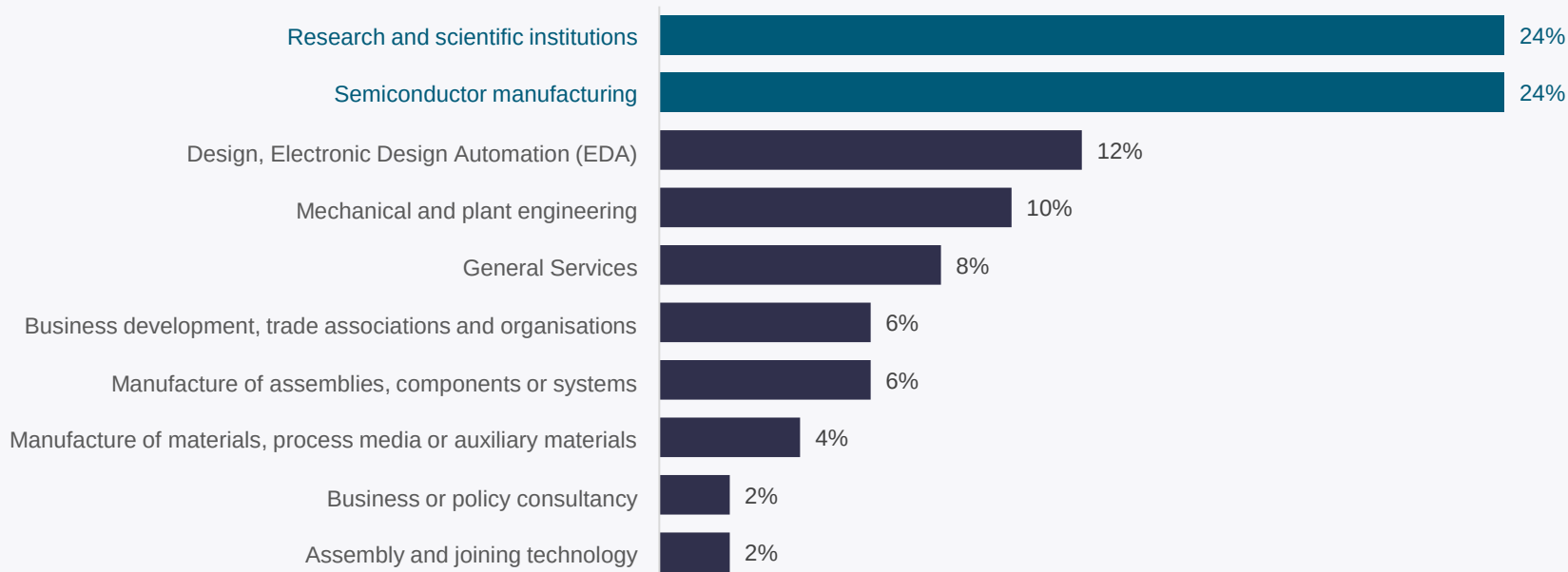
KEY FIGURES ON THE SENTIMENT SURVEY

The Microelectronic Sentiment Index is based on a wide-ranging survey of experts, which was carried out between **13 June** and **10 November 2025**. An online questionnaire was used as the **survey method**. A total of **49 fully completed questionnaires** were included in the analysis (n=49).

Stakeholders from the fields of semiconductor manufacturing, the production of materials, process media and auxiliary materials, and the manufacture of components, assemblies and systems were invited to take part, as well as those from the sectors of raw material extraction and processing, assembly and interconnection technology, recycling and waste disposal, mechanical and plant engineering, and design and electronic design automation (EDA). Also invited were stakeholders from the service sector, research and scientific institutions, economic development agencies and political administration – as well as investors, trade associations and organisations.



AREAS OF WORK OF THE SURVEY RESPONDENTS



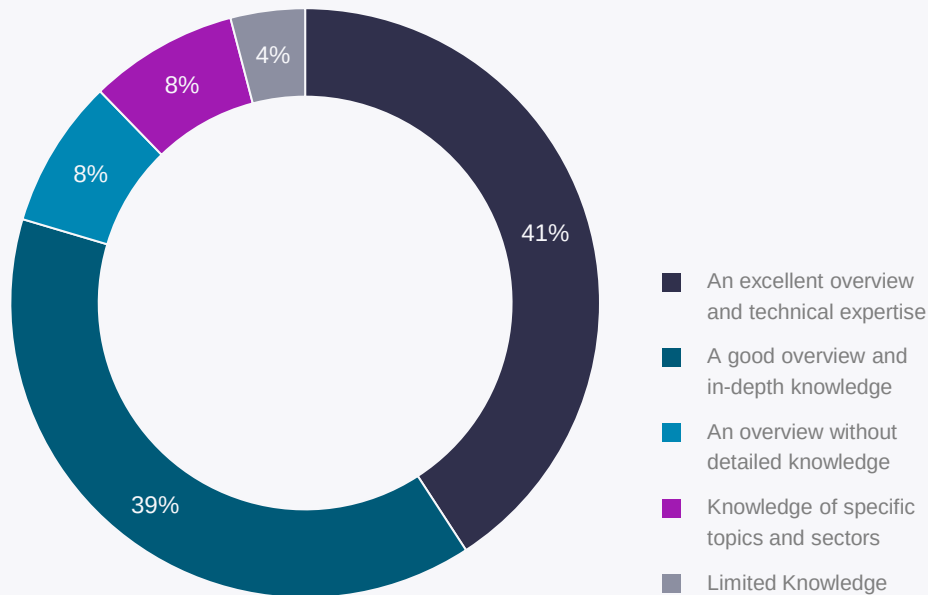
A total of 49 fully completed questionnaires (n=49)

TECHNICAL EXPERTISE OF THE STAKEHOLDERS SURVEYED

How would you rate your overall knowledge of microelectronics?

The fact that just under 39 percent of the experts surveyed consider themselves to have a good general understanding combined with detailed knowledge, and that around 41 percent state that they have a very good general understanding and specialist technological expertise, is a key indication of the quality of the responses provided.

The reverse is also true: 4 percent of those surveyed stated that they had only a limited knowledge of the subject. And, according to their own assessment, 8 percent each have only 'knowledge of specific topics and sectors' or an 'overview without detailed knowledge'.



KEY FINDINGS ON THE ACCOMPANYING PANEL QUESTIONS

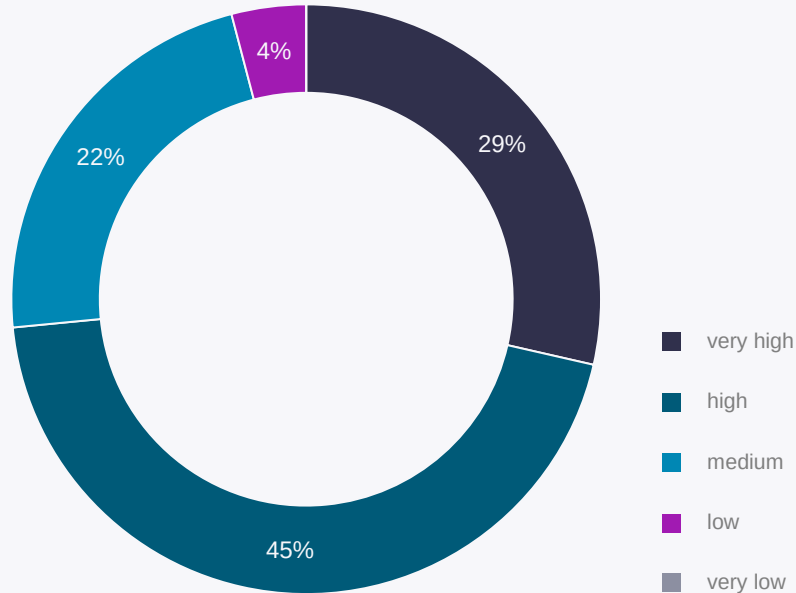
MICROELECTRONICS SENTIMENT INDEX 2025 (EXCERPTS)

VALUE-ADDED POTENTIAL OF MICROELECTRONICS (TOTAL)

How do you assess the overall value-added potential of microelectronics in Germany?

The vast majority of stakeholders surveyed rate the value-creation potential of microelectronics as high to very high: according to the survey, 74 percent of participants rate the potential in Germany as 'high' (45 percent) or even 'very high' (29 percent).

By contrast, around two in ten respondents expect moderate potential, whilst only 4 percent expect low value-added potential. However, nobody expects very low potential.

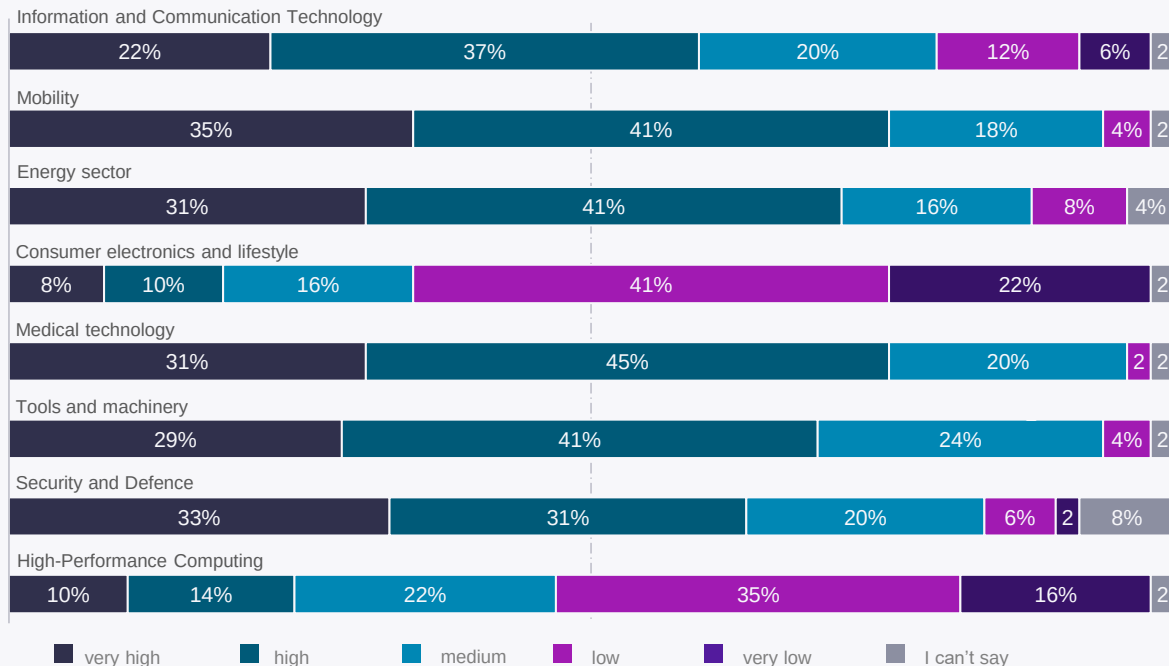


VALUE-ADDED POTENTIAL OF MICROELECTRONICS (BY APPLICATION AREA)

How do you assess the value-added potential of microelectronics in Germany for the following areas of application?

According to those surveyed, the greatest market potential for the German microelectronics industry lies in the mobility sector: 76 per cent of respondents see high (41 percent) or even very high (35 percent) value-added potential in this area. The potential in medical technology is assessed as being similarly high.

The 'consumer electronics and lifestyle' sector is seen as having the lowest potential: only 18 per cent of those surveyed expect high (10 percent) or very high (8 percent) market potential here.

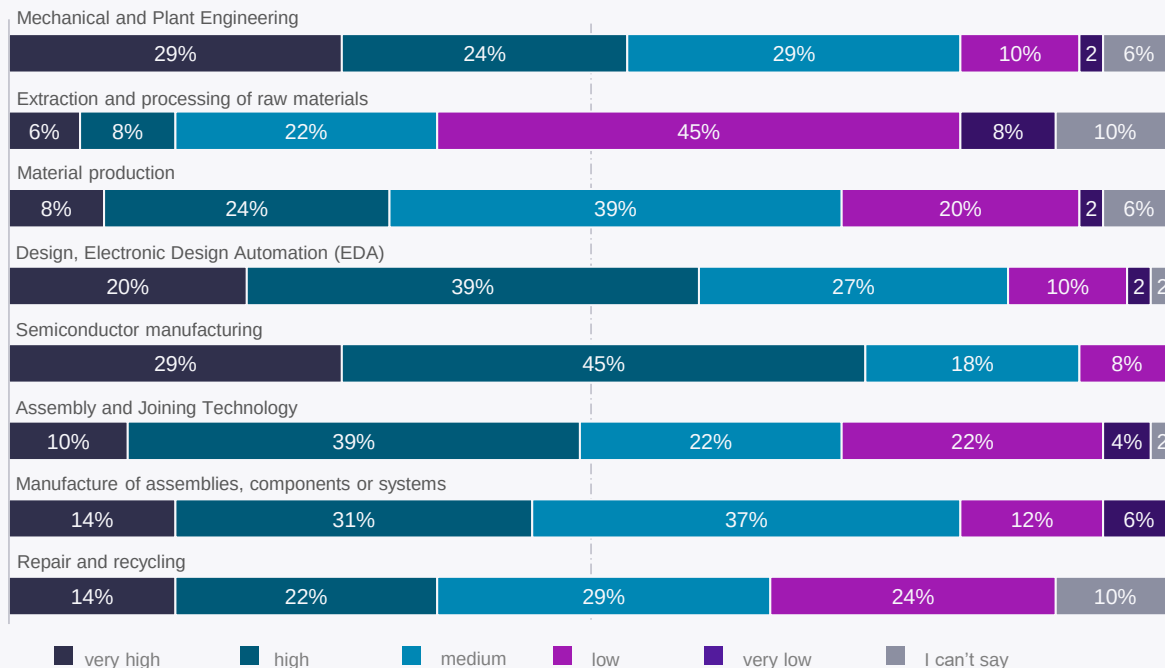


VALUE-ADDED POTENTIAL OF MICROELECTRONICS (BY VALUE-ADDED STAGE)

How do you assess the prospects for economic success of the following stages of the microelectronics value chain in Germany?

Respondents see by far the greatest potential for value creation, in terms of value-added stages, in the field of 'semiconductor manufacturing': here, 74 percent of respondents rate the potential for value creation as 'high' (45 percent) or even 'very high' (29 percent).

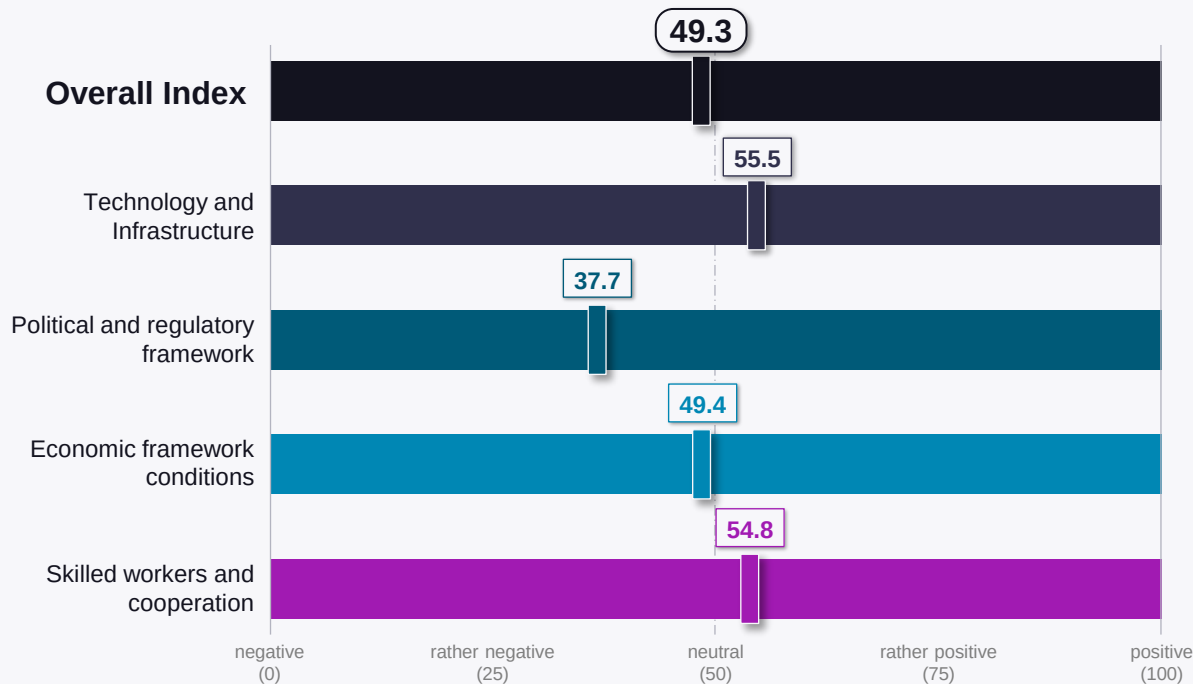
Respondents attribute significantly lower potential to 'raw material extraction and processing' in Germany: only 8 percent of respondents expect high potential here, and just 6 percent expect very high potential.



KEY FINDINGS FROM THE SURVEY ON THE SENTIMENT INDEX

MICROELECTRONICS SENTIMENT INDEX 2025

OVERALL INDEX: FRAMEWORK CONDITIONS FOR THE GERMAN MICROELECTRONICS INDUSTRY

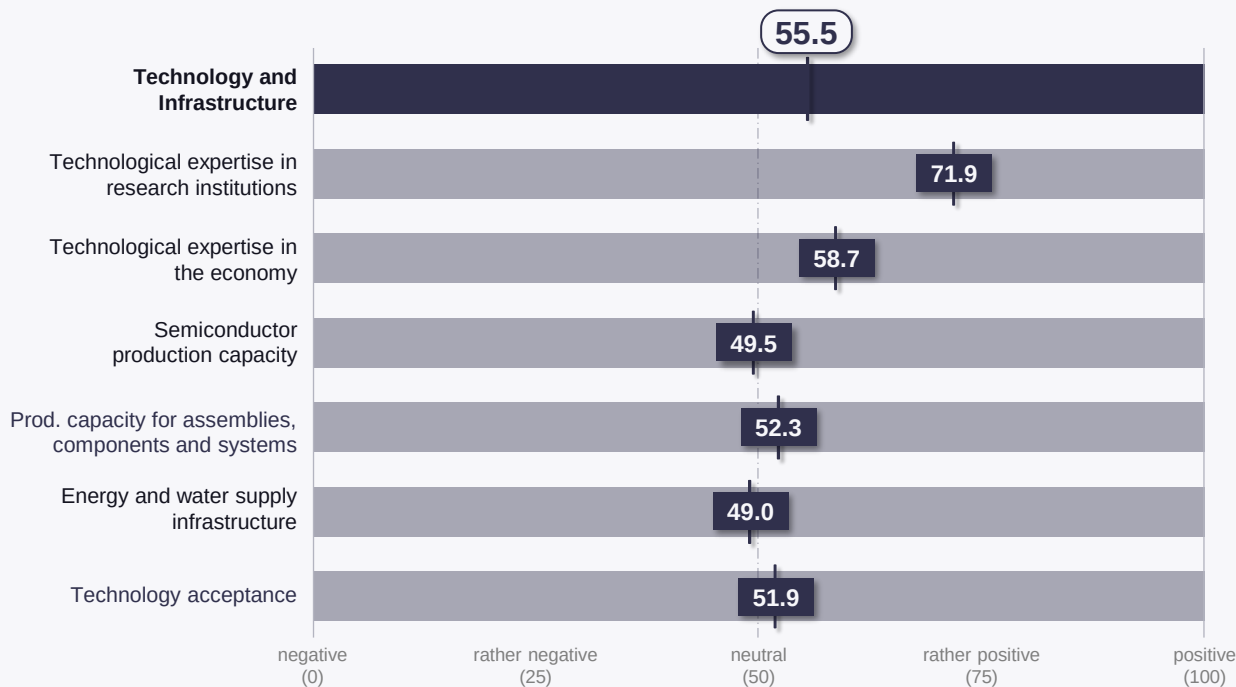


How do you assess the current framework conditions for the microelectronics industry in Germany?

The experts surveyed do not rate the framework conditions for the microelectronics industry in Germany as either positive or negative: the overall index currently stands at 49.3.

The respondents see the greatest need for improvement in the political and regulatory framework: here, the score stands at 37.7 points. The 'Technology and Infrastructure' category performs best (55.5 points) – although there is still significant room for improvement here too.

SUBINDEX I: TECHNOLOGY AND INFRASTRUCTURE

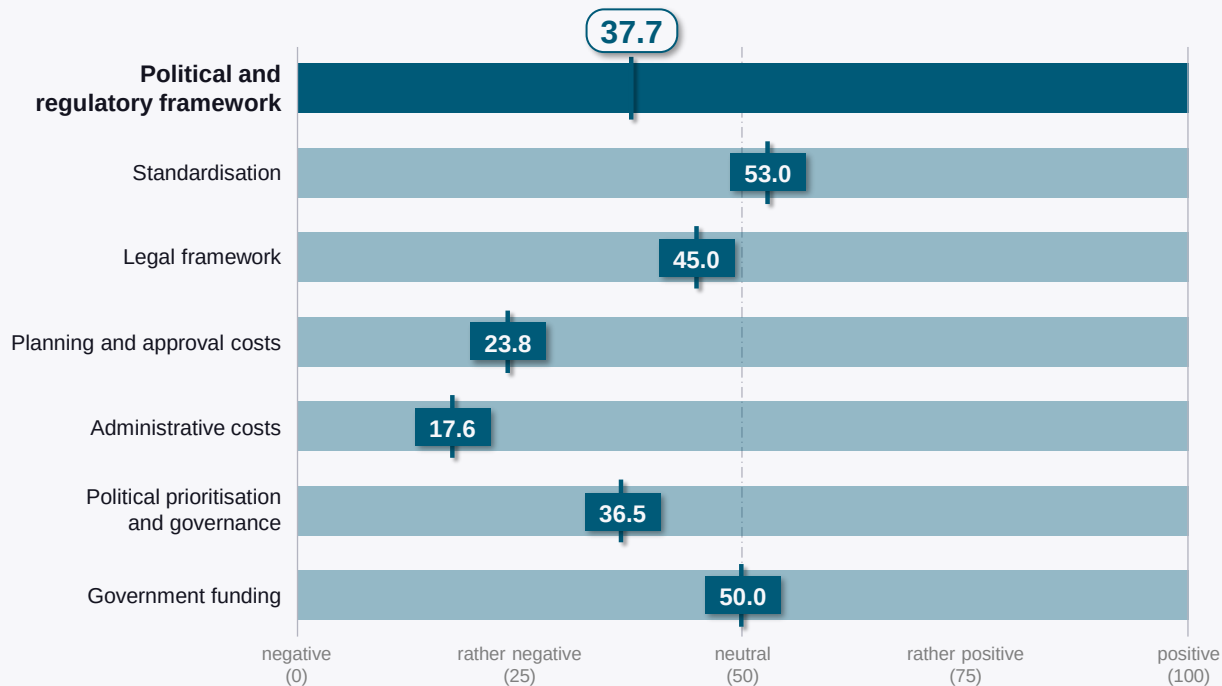


How do you assess the current framework conditions for the microelectronics industry in Germany?

Respondents rate the overall framework conditions in the area of technology and infrastructure as neutral, with a slightly positive trend – although the individual scores are mixed.

Whilst 'energy and water supply infrastructure' stands at 49.0 points, technological expertise in German research institutions is rated significantly more positively: the score here currently stands at 71.9 points.

SUBINDEX II: POLITICAL AND REGULATORY FRAMEWORK

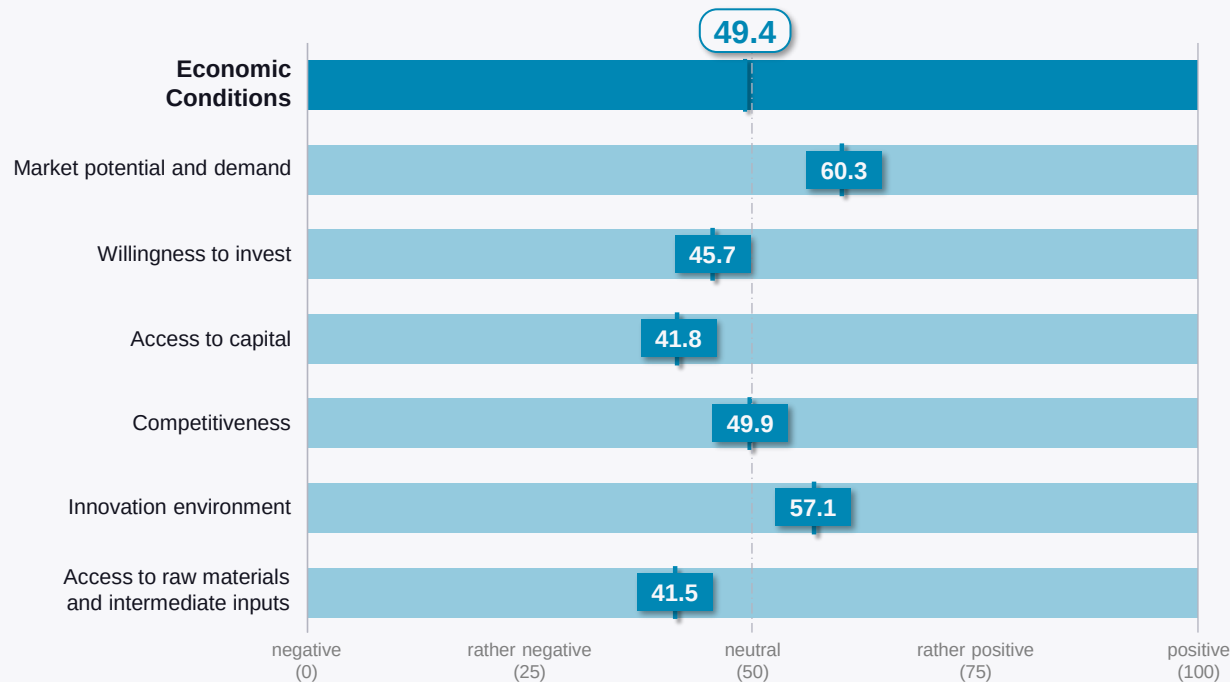


How do you assess the current framework conditions for the microelectronics industry in Germany?

The score for the political and regulatory framework currently stands at 37.7 – placing it in the more negative end of the scale.

In particular, the individual scores for planning and approval costs (23.8) and bureaucratic costs (17.6) are viewed negatively by the stakeholders surveyed. The area of standardisation, on the other hand, fares somewhat better: here, the score of 53.0 points places it in the neutral range.

SUBINDEX III: ECONOMIC CONDITIONS

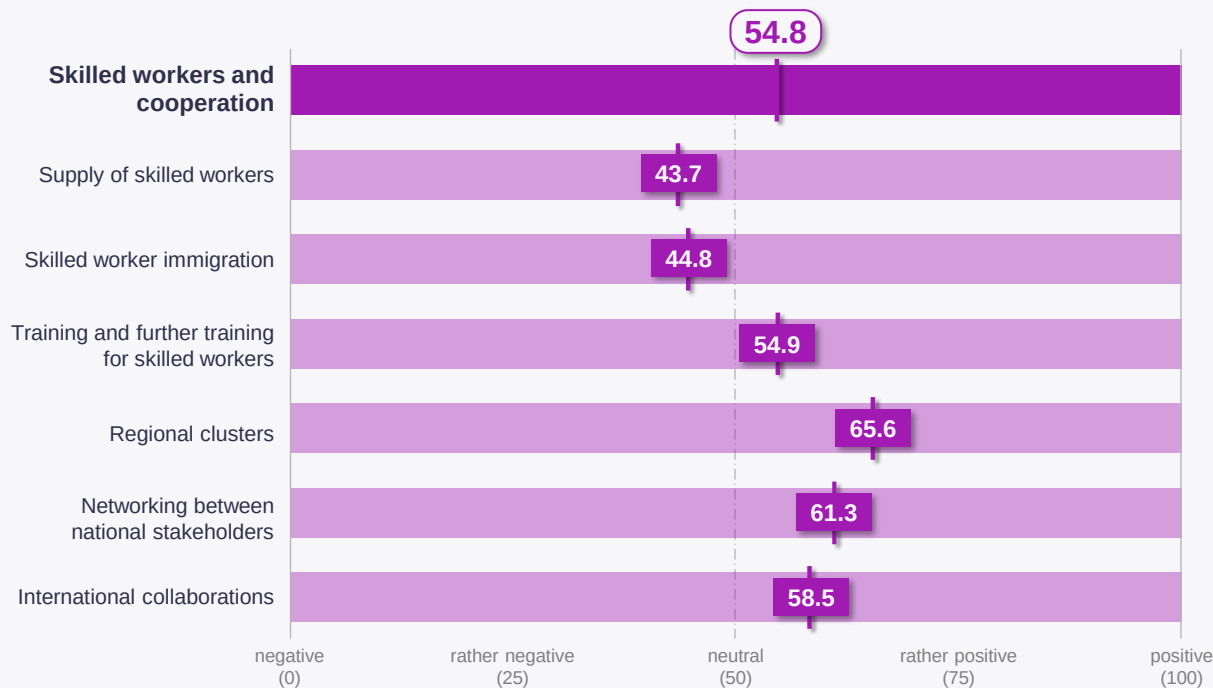


How do you assess the current framework conditions for the microelectronics industry in Germany?

The value for sub-index III currently stands at 49.4. This indicates that respondents view the economic operating conditions as neutral, with a slightly negative trend.

Whilst the figure for 'market potential and demand' (60.3) points clearly in a positive direction, 'access to capital' (41.8) and 'access to raw materials and intermediate inputs' (41.5) are assessed as significantly more negative in a direct comparison.

SUBINDEX IV: SKILLED WORKERS AND COOPERATION



How do you assess the current framework conditions for the microelectronics industry in Germany?

Respondents rate the framework conditions relating to skilled labour and cooperation as neutral – with a slightly positive bias (54.8).

Whilst the existing regional cluster structures are generally rated neutrally by respondents, with a somewhat positive trend (65.6), the index values for ‘availability of skilled workers’ (43.7) and ‘immigration of skilled workers’ (44.8) point in a neutral direction with a negative trend.

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LEGAL NOTICE

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