



**FUTURE HORIZONS  
Presents**

## **2013 Semiconductor Market Forecast Update**

*Concerned About The Industry Outlook  
for 2013 and Beyond?*

Get The Proven Experts View At Future Horizons'  
Annual Forecast Of The European & Worldwide  
Semiconductor Industry

Plus Meet New Business Contacts

**When People Want The 'No-Nonsense' Truth,  
They Come To Future Horizons ...**

**Programme Includes:**

**Convenient Location  
Essential Information**

- **2013 - 14 Market Update ...**  
The Key Factors Analysed
- **2014 - 2015 Industry Outlook ...**  
Continuing Uncertainty or Bright Skys Ahead?
- **Key Industry Drivers ...**  
450mm plus Key Technology Application Trends
- **Supply & Demand ...**  
Fab Capacity plus Foundry, Fabless, Fab-Lite & IDM
- **Market Outlook ...**  
5-Year Regional & Product Trends
- **Networking**  
Meet New Business Contacts Quickly & Easily

**July 23, 2013**

**NH Harrington, South Kensington, London**

**Supported By:**



## Who Should Attend?

*The Forecast Is Vital For Executives Responsible For:*

- Market Research & Marketing
- Strategic Marketing & Planning
- Executive Management
- Purchasing & Acquisition
- Finance & Administration
- Sales & Distribution Channels
- Investment & Banking
- Engineering & Design
- Project Management
- Government Organisations
- Business & Technical Press

**Sign Up Now ...**

**Get The Proven Experts' View**

### Future Horizons

Established in 1989, Future Horizons provides a range of semiconductor market research and business support services. Together with its wholly-owned Moscow-based subsidiary, East-West Electronics, Future Horizons is the world's leading authority on the Russian and East European electronics market. It was also a member of the 1994 European Commission sponsored Cornu Panel of senior industry executives responsible for publishing the "Report of the European Microelectronics Panel" used to help formulate a strategy for future EC microelectronics support in Europe, and undertook a justification analysis for the European governments for both the MEDEA and MEDEA+ programmes. Malcolm Penn, founder and CEO of Future Horizons, has over four decades of experience in the semiconductor and electronics industry, and has worked extensively throughout Europe as well as in the United States, the former USSR, Japan and Korea. Collectively, Future Horizons' key industry analysts boast more than 100 man-years of semiconductor industry experience and expertise. Prior to establishing Future Horizons, Mr Penn was Vice President of Dataquest and set up their European semiconductor and other market research activities. Before joining Dataquest, he was Manager of Component Engineering for ITT Europe (now Alcatel) and prior to that held various operations and marketing management positions within the ITT Semiconductor worldwide group.

## Get The Inside View At The IFS2013

The semiconductor industry is a volatile business where insights, experience and professionalism are key. Strategically timed, the Semiconductor Market Forecast event summarises and presents the extensive research capability of Future Horizons industry analysts. Giving you the information to confidently plan for the future. Now in its 15th year, Future Horizons' twice-yearly forecast events are a vital link in our charter to provide the industry with high quality, cost effective, market research. Whether a seasoned veteran or industry newcomer, this event is invaluable to executives from the semiconductor, electronics and related industries. Delegates will receive copies of all the material presented in both binder and CD-ROM format.

***Meet the analysts - Get the facts - Hear the arguments -  
Clarify your judgements - Justify your positions***

## Why Attend?

- Hear an independent assessment of the world economic outlook
- Get clarification of what is expected to happen in the industry for the coming 6-12 months and beyond
- Understand the industry cycles and their effect
- Review industry outlook for the next one to five years
- Identify key application and technology issues and trends
- Update statistics and analysis for internal company decisions
- Meet new business contacts saving valuable time and money
- Challenge the experts, test your business positions
- **We tell you the truth PLUS the reasons why**

**“Lack of visibility today makes it very difficult to see what is around the corner, making planning very difficult. It was very useful to get a new perspective”**

**Vice President Sales, Sumco  
Europe Sales Plc**

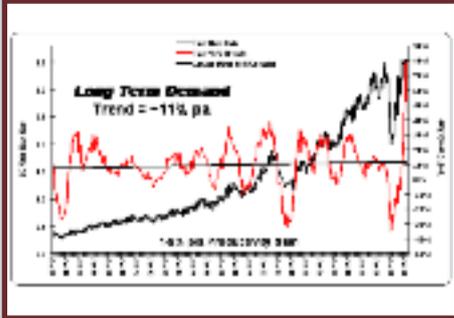
**“This event is a good opportunity to stay focused, it is very valuable to get this opportunity twice a year”**  
**Altis Semiconductor**

## Benefits of Attending

- Forecast data and industry market analysis will enable you to make more confident business decisions, allocate resources accordingly and help you analyse your business models and plans and adjust accordingly.
- Immersing yourself in up-to-date industry information will give you the knowledge to move ahead of your competition.
- Following the forecast, you will have the 'know how' to identify industry patterns and market conditions you can expect to see in the immediate future and beyond.

## Agenda

Please Note The Event Is Conducted In English



**Can You  
Really Afford  
NOT To  
Be There?**

### Registration & Coffee From 10am

#### 10.30 Welcome & Introduction

#### 10.45 Economic Overview

- \* Current world status and outlook
- \* World GDP contributions and trends
- \* GDP growth trends
- \* Advanced & emerging economies
- \* Key regional economic outlooks

#### 11.15 IC Industry Outlook

- \* Current industry status and outlook
- \* Key market drivers analysed
- \* Industry trends and key issues

#### 12.30 Networking Lunch (Included in the seminar fee)

#### 13:30 Industry Capacity

- \* Manufacturing basics
- \* SC equipment sales trends
- \* Wafer fab capacity vs SC market
- \* Foundry trends
- \* IDM, fab-lite and fabless key issues

#### 14.00 450mm Transition

- \* Why 450mm?
- \* Who and how?
- \* Likely roll-out scenario
- \* Impact on 300mm, MM and MtM

#### 14.30 Coffee Break

#### 14.45 Key Market Trends

- \* ARM vs Intel
- \* Tablets vs PCs
- \* New growth opportunities

#### 15.00 Forecast Summary

- \* The basics revisited
- \* Forecast summary

#### 15.30 Ask The Analyst

- \* FH analyst Q&A open panel
- \* Closing remarks

#### 16.00 Wrap Up

### Book A Place

To register your place contact Future Horizons. Call, email or book online.

### Fee

Fee includes course reference binder, lunch and coffee breaks. Seminar hours: 10.30am - 4.00pm

If you are unable to attend the Semiconductor Market Forecast event but don't want to miss out on that all important industry information, you can order Proceedings.

### 10% Group Discount

For three or more delegates from the same company. To qualify, registration and payment must be received together. Or save yourself 30% if you book both the Semiconductor Market Forecast and either the IC Economics or the Silicon Chip Workshop at the same time.

Tel: +44 1732 740440

e-mail: [mail@futurehorizons.com](mailto:mail@futurehorizons.com)

[www.futurehorizons.com](http://www.futurehorizons.com)

Future Horizons Ltd

44 Bethel Road | Sevenoaks | Kent TN13 3UE | England | Fax: +44 1732 740442 | In Russia, Tel: +7 495 228 0766

# Registration Information

Please Register Me  
For The Following

## The Semiconductor Market Forecast Event

Send Completed Form By Fax/Mail Or  
Online @ [www.futurehorizons.com](http://www.futurehorizons.com)

### Registration

Registration should be made using this form - please copy for additional delegates to qualify for the group discount. Participation is subject to space availability.

**Please register early to ensure availability**

### Group Discounts

10% group discount price applies to three or more delegates from the same facility registering at the same time with the registration fee paid on a single invoice.

### Cancellations

Cancellations made less than two weeks prior to the event are subject to a 50% cancellation fee and must be confirmed in **writing**, otherwise the full fee will apply. Refunds will not be granted after the event date or for no-shows. Substitutions may be made at any time up to the event date and confirmed in writing to Future Horizons.

In the unlikely event that the event is cancelled, delegates will be notified and all fees paid will be refunded in full.

### Payment Must Be Pre-Paid IN FULL

It is the delegate's responsibility to ensure that payment has been made. The registration fee includes forecast, presentation binder material, coffee breaks and lunch. Accommodation at the hotel is NOT included.

If overnight hotel is required, please enquire about rates upon booking.

Payment can be made by cheque (drawn on a **UK bank only**), or by bank transfer to:  
**Future Horizons Ltd**, Royal Bank of Scotland, 3a Edinburgh Road, Portsmouth, PO1 1DA, UK, Sort Code: 16:28:24 Account No: 11686316

Event	Date Venue	Check Box
IFS2013	Tues 23 Jul, London, UK	

**If you cannot attend, Proceedings are available on request**

Delegate Details (Or Attach Business Card)		
Full Name <i>Mr/Ms/Mrs</i>		
Job Title		
Company		
Full Postal Address		
Post Code		
VAT/TVA/MWS/IVA No.		
<b>(Please Note - This Must Be Supplied)</b>		
PO No.		
Phone	Fax	
E-mail		
Special Diet?	Yes <input type="checkbox"/>	No <input type="checkbox"/> If "Yes", specify:
Overnight Hotel?	Yes <input type="checkbox"/>	No <input type="checkbox"/> If "Yes", see information left
Registration Fee (Per Delegate)		
UK Standard Rate	£595 + VAT @ 20%	Total Fee £714.00
Group Rate (3 or more)	£545 + VAT @ 20%	Total Fee £654.00
Fee per person		
Proceedings CD Only	£295 + VAT @ NA	Total Fee £295.00
<b>Don't Forget, Book Three People From The Same Company &amp; Get A 10% Discount</b>		
An invoice will be sent by email on receipt of seminar registration.		
Pre-Payment Mandatory Payment by UK Cheque: <input type="checkbox"/> or Bank Transfer: <input type="checkbox"/>		

**UK VAT APPLIES TO ALL UK-BASED EVENTS**

### US Affiliate:

#### Pathfinder Research

13901 North 73rd Street, Suite 205  
Scottsdale, Arizona 85260, USA  
Tel: + 1 480 348 1133  
Fax: + 1 480 348 9745  
hfeeney@pathfinder-research.com

### Israel Affiliate:

#### Amir Ben Artzi Content & Media

40 Derech Hayam St.  
Havatzelet Hasharon, 42937 Israel  
Tel: + 972 73 7367966  
Fax: + 972 9 8665799  
amir@amircm.com

### Russian Affiliate:

#### ELINT

6th Floor, 40 Bldg  
1, 3y Proezd Maryinoy Roshchi  
127018 Moscow, Russia  
Tel: +7 459 228 0766  
Fax: + 7 495 787 3869  
elintsp@mail.ru

### Indian Affiliate:

#### Pradeep Chakraborty PC Mediaworks

Tel: +91 99451 27632  
pradeepchakra@gmail.com

### European Affiliate:

#### GMC Suisse

Ch. de la Dauphine 20  
CH-1291 Commugny  
Switzerland  
Tel: + 41 22 349 0939  
wladek@grabinski.ch

### Far East Affiliate:

#### Semicon Research Ltd

Kagami Ishi Bldg., 1-11-7, Bunkyo-Ku  
Yushima, Tokyo 113, Japan  
Tel: + 81 3 5684 3941  
Fax: + 81 3 5684 3943  
o\_ohtake@semiconresearch.com