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The Global Semiconductor Industry Analysts

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GloFlo Bets on DoD to Revive U.S. Chip Making

As the U.S. looks to reconstitute its semiconductor supply lines, GlobalFoundries is positioning itself as a trusted chipmaker for the U.S. Department of Defense. The company claims that it can scale production of key components like radiation-hardened chips while creating multiple manufacturing sources.

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TALK TO US



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Huawei Ban Could Slow UK 5G Rollout

The UK Government has performed a massive U-turn by forcing mobile network operators to strip out any 5G equipment supplied by Huawei that they had already installed. The operators' deadline to conform is 2027.

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Arm Plans to Divest IoT Services Business, Focus on Chip IP Again

Arm plans to transfer its Internet of things (IoT) related businesses, which it acquired in 2018, to SoftBank Group Corp., in order to focus on its core semiconductor intellectual property (IP) business.

Arm said in a statement that it intends to transfer its two IoT services group (ISG) businesses — the Pelion IoT platform business and Treasure Data — to new entities that would be owned and operated by SoftBank, in order to strengthen its focus on growth and profitability. Upon completion of the proposed transfer, Arm will deepen its focus on its core semiconductor IP business and expects to continue collaborating with the new ISG businesses.

GloFlo Bets on DoD to Revive U.S. Chip Making

As the U.S. looks to reconstitute its semiconductor supply lines, GlobalFoundries is positioning itself as a trusted chipmaker for the U.S. Department of Defense. The company claims that it can scale production of key components like radiation-hardened chips while creating multiple manufacturing sources.

As Moore's Law runs out of steam, the foundry operator also is betting on greater efficiencies through chip integration rather than finer lithography.

A trade war with China and tightened U.S. export controls aimed at telecom giant Huawei have created openings for both GlobalFoundries and rival Taiwan Semiconductor Manufacturing Co. As Washington seeks to cut off access by Huawei and its HiSilicon chip unit to leading-edge IC manufacturing gear, U.S. trade officials wait to see whether TSMC will make good on plans to build a fab in Arizona.

Samsung Leads Semiconductor Paradigm Shift with New Material Discovery

Researchers at the Samsung Advanced Institute of Technology (SAIT) have unveiled the discovery of a new material, called amorphous boron nitride (a-BN), in collaboration with Ulsan National Institute of Science and Technology (UNIST) and the University of Cambridge. Published in the journal Nature, the study has the potential to accelerate the advent of the next generation of semiconductors.

2D Materials – The Key to Overcoming Scalability Challenges

Recently, SAIT has been working on the research and development of two-dimensional (2D) materials – crystalline materials with a single layer of atoms. Specifically, the institute has been working on the research and development of graphene, and has achieved groundbreaking research outcomes in this area such as the development of a new graphene transistor as well as a novel method of producing large-area, single-crystal wafer-scale graphene. In addition to researching and developing graphene, SAIT has been working to accelerate the material's commercialization.

Softbank Said To Have A Buyout Offer For Arm

Softbank is said to have been weighing the possibility of holding an initial public offering (IPO) for Arm Holdings, but now there's said to be at least one company out there that wants to straight-up buy Arm from Softbank.

Balancing a possible IPO against a possible sale is complicated, so Softbank has engaged the services of Goldman Sachs to help it sort out what to do with the designer of microprocessor cores that it bought in 2016 for \$32 billion. Softbank hiring Goldman Sachs was first reported by The Wall Street Journal. The WSJ's source said Softbank called Goldman after receiving "inbound interest" from another company about buying Arm.

None of the three companies had commented publicly as this article was written. (Four – if you count the unidentified suitor.)

Huawei Ban Could Slow UK 5G Rollout

The UK Government has performed a massive U-turn by forcing mobile network operators to strip out any 5G equipment supplied by Huawei that they had already installed. The operators' deadline to conform is 2027.

The announcement today also mandates that no new Huawei kit for 5G deployment can be purchased by the end of this year, and confirmed that the existing ban on Huawei gear in the sensitive core part of network remains in place.

In February, the Government said it would allow a 35% limit on infrastructure from 'high risk vendors', of which Huawei is a significant one, notably for radio access networks (RAN), and a complete ban in operators' core networks. This, it suggested, would be sufficient to ensure security and resilience, whilst preserving competitiveness.