

Innovation and Technology Development of the Chinese IC Packaging Industry

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Chinese IC Packaging Industry Technology Innovation Strategic Alliance (PITISA)



- Established on December 30, 2009.
- Inauguration ceremony held in Beijing with the General Party Secretary and Deputy Minister of the Ministry of Science and Technology (MOST) as the honor speaker and guest.
- The first industry alliance under the umbrella of the 02 National Hi-Tech Program.

Charter of PITISA

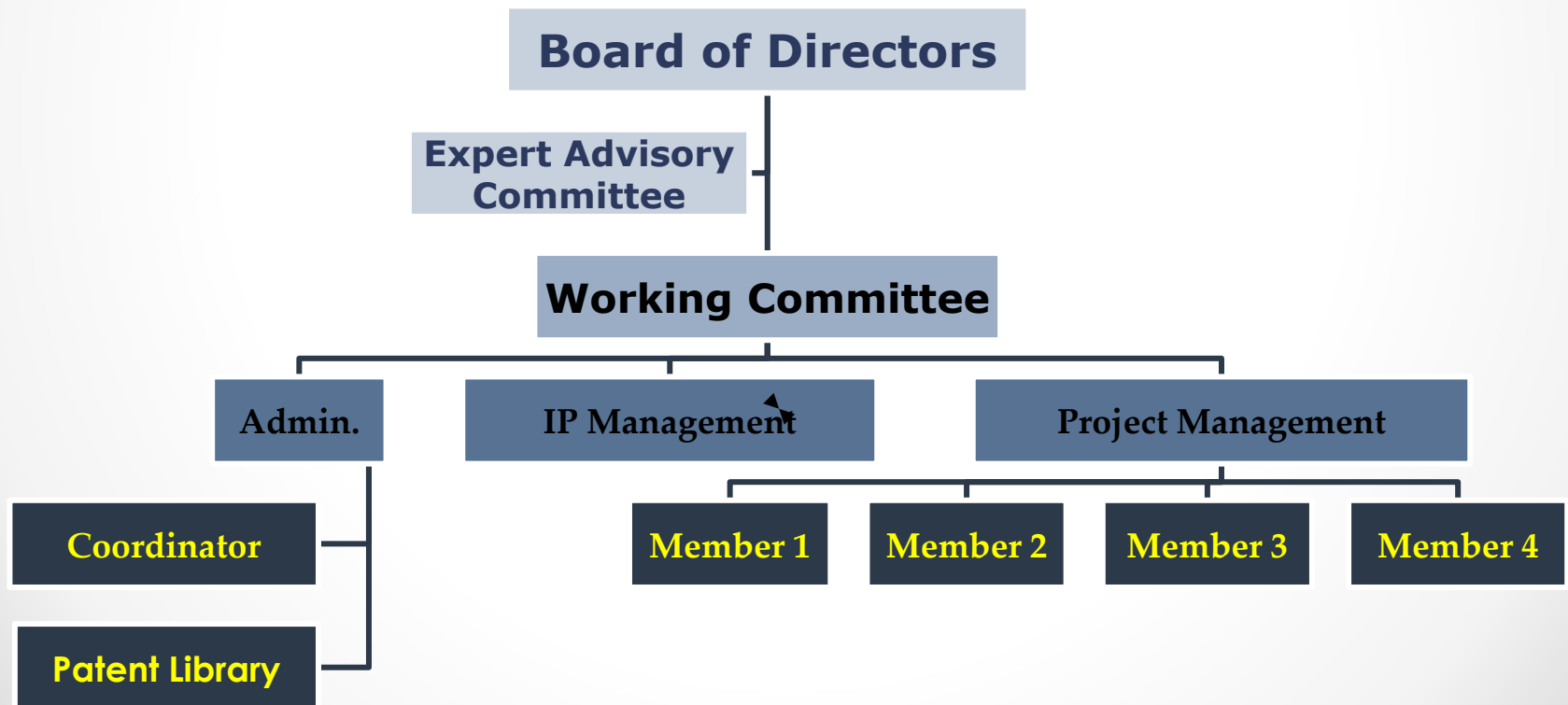
- 1. To promote the domestic IC packaging equipment, materials, and manufacturing industry, education and research.**
- 2. To facilitate the close collaboration among domestic IC packaging industry, research institutions and universities.**
- 3. To advance the domestic packaging technology innovation and accelerate the adoption of advanced technology.**
- 4. To establish a platform for information exchange, communications, industry and technology roadmapping.**
- 5. To liaison with and advise to various government bodies on IC packaging industrial policy, planning and incentives.**
- 6. To coordinate various government and industrial programs and activities in packaging and test manufacturing, equipment, materials, research, development and education.**

Organization Structure of PITISA

PITISA is hosted by Jiangsu Changjiang Electronics Technology Co., Ltd. (JCET) and supported by Nantong Fujitsu Microelectronics (NFME).

Chairman of the Board is Mr.Xinchao Wang, CEO of JCET and General Secretary is Mr.Xiekang Yu, Vice Chairman of JCET.

25 members in the Alliance, representing the majority of packaging assembly and test industry, research and development and education in China.



Current Membership

Jiansu Changjiang Electronics Technology Co., Ltd. (JCET)	Assembly & Test
Nantong Fujitsu Microelectronics Co., Ltd. (NFME)	Assembly & Test
Beijing Zhong Dian Ke Electronics Equipment Co.	Equipment
CETC No.2 Institute	Equipment
Wuxi Anst Co.	Assembly & Test
Tianshui Huatian Co.	Assembly & Test
Ningbo Kangqiang Co.	Materials
Shennan Circuits Co. (SCC)	Materials
Microelectronics Research Institute of CAS	Research
Microsystems and Information Technology Research Institute of CAS	Research
CETC No.13 Institute	Assembly & Test
CETC No.58 Institute	Assembly & Test
Tsinghua University	Research & Education
Fudan University	Research & Education
Huazhong University of Science and Technology	Research & Education
Shanghai Microelectronics Equipment Co.	Equipment
Shenyang Kingsemi Microelectronics Systems	Equipment
Shenzhen Grand Technology	Equipment
Trinity Electronics Co.	Equipment
Jiangyin Glory Technology Co.	Equipment
Dalian Jiafeng Electronic Co.	Equipment
Shanghai Singyang Semiconductor Materials Co.	Materials
Runma Electronics Chemical Co.	Materials
Jiangsu Zhongpeng Electronic Co.	Materials
Yixin Electronic Component Factory	Assembly & Test

Major Achievements

- **Established and Enhanced the Operations**
 - Staffed up the Working Committee
 - Produced a recommendation for packaging assembly and test equipment and materials development and market strategy to better service the domestic demand and localize the supply.
 - Recommended the members to further invest in management system and attract overseas talents to improve management, operations and market research to narrow the gap with the international leading players
- **Coordinated the programs in the “Eleventh 5-Year Plan” (11.5)**
 - The Alliance performed audit, review and tracking of all the IC packaging and test projects in the “Applied Engineering Program of Key Packaging and Test Equipment and Materials” during the 11.5 period.
- **Organized the Draft of IC Packaging and Test Part for the “Twelfth 5-Year Plan” (12.5)**
 - By the directives of the Office of Special Program Management of the Ministry of Science and Technology and under the leadership of the Special Program Taskforce, The Alliance organized the draft of the Guidelines No.4 – Packaging and Test Equipment, Processes and Materials as part of the 2011 National Hi-Tech Program “ULSI Manufacturing Equipment and Complete Processes”.
- **Promoted the IP and Patent Awareness and Development**
 - Enacted the Alliance’s “IP Management Guidelines” and “Patent Management Method”. Encouraged members of the Alliance and 02 Hi-Tech Program participants to effectively manage their IP resources and convert R&D results into patents for better protection of technologies. Under the Program, 10 key technologies were developed and 127 patents were granted.

Awards and Recognitions

- **The Alliance was praised in the “2011 National Science and Technology Working Conference”**

JCET was recognized as the “Excellent Execution Team of 11.5 Hi-Tech Project”

Mr.Xiekang Yu, General Secretary of PITISA was awarded the “Outstanding Organizer of 11.5 National Science and Technology Program”



JCET Profile

- **Founded:** Dec. 1972
- **Location:** Jiangyin City, Jiangsu Province
- **Chairman:** Mr. Wang Xinchao
- **General Manager:** Mr. He Zhiwen
- **Registered Capital:** USD 111 Million
- **Total Land Area:** 325,008 Sqm.
 - Total Building Area:** 96,212 Sqm.
 - Clean Room:** 29,540 Sqm. (Class 10K)
12,380 Sqm. (Class 100K)
- **Employees:** 8000
- **Publicly Listed on SSE:** June, 2003

2009 World Wide SATS Ranking

2009 Ranking	2008 Ranking	Company	Headquarters Country	2008 Revenue (\$M)	2009 Revenue (\$M)	2009 Growth (%)
1	1	ASE	Taiwan	2,952	2,597	-12.0
2	2	Amkor Technology	United States	2,658	2,179	-18.0
3	3	SPIL	Taiwan	1,918	1,722	-10.2
4	4	STATS ChipPAC	Singapore	1,658	1,326	-20.0
5	5	Powertech Technology	Taiwan	994	982	-1.2
6	6	UTAC	Singapore	711	600	-15.6
7	7	ChipMOS Technology	Taiwan	519	368	-29.1
8	11	JCET	China	349	342	-2.0
9	8	King Yuan Electronics	Taiwan	413	319	-22.8
10	9	Unisem	Malaysia	373	300	-19.6
		Total Top 10		12,545	10,735	-14.4
		Others		7,556	6,452	-14.6
		Total Market		20,101	17,187	-14.5

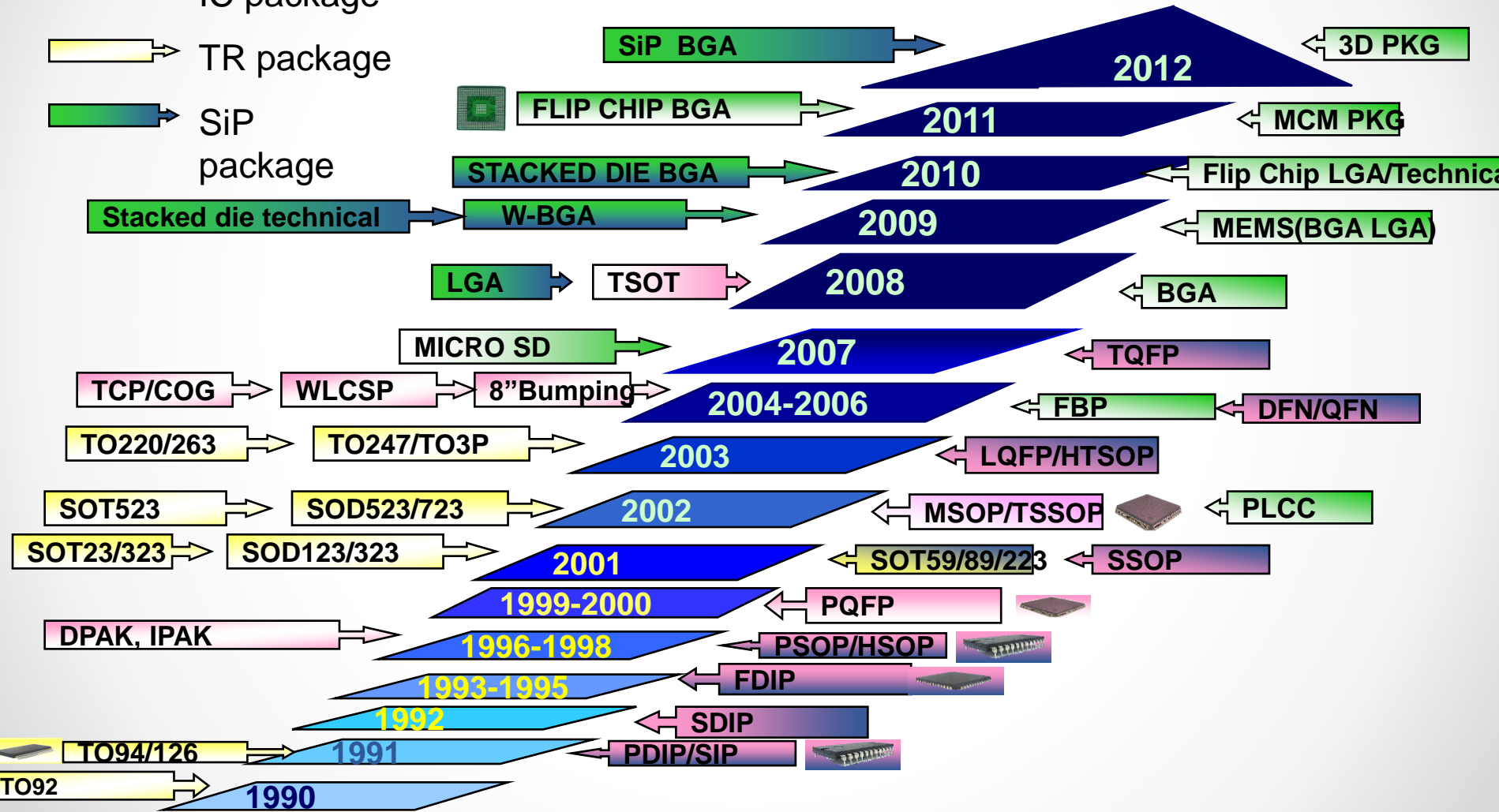
Top 10 SATS Companies' Revenues, 2009. (Source: Gartner, February 2010)

JCET Overall Product Roadmap

IC package

TR package

SiP package



Thank You !

www.cj-elec.com