



**U.S. Department of Commerce
Bureau of Industry and Security
Office of Strategic Industries and Economic Security**



U.S. Microelectronics Industry Survey and Assessment Overview

The U.S. Department of Commerce, Bureau of Industry and Security (BIS) is conducting an assessment exploring the semiconductor manufacturing equipment and materials, gases, and wet chemicals segments of the semiconductor manufacturing chain. This survey is a follow-on effort to the recently completed report published in December 2023 entitled, "Assessment of the Status of the Microelectronics Industrial Base in the United States." These Congressionally mandated assessments are being carried out pursuant to section 9904 of the William M. (Mac) Thornberry National Defense Authorization Act (NDAA) for Fiscal Year 2021(15 U.S.C. § 4654).

The principal goal of this current assessment is to evaluate risks posed to the U.S. economy and the Defense Industrial Base within the upstream value chain for semiconductor manufacturing equipment and materials, gases, and wet chemicals. The BIS survey is designed to provide detailed information on several categories, including organizational data, facility information, products, customers, suppliers, servicing, export controls, supply chain risk management, workforce, and competition and challenges across the different manufacturing process steps.

The resulting data will provide a comprehensive understanding of the overall health and competitiveness of the semiconductor manufacturing equipment and materials, gases, and wet chemicals segments of the microelectronics industry in the United States. In addition, data resulting from this collection will provide BIS with information that is otherwise not available and needed to conduct its industry assessment under the FY 2021 NDAA Section 9904 requirements.

Approximately 300 organizations will be invited to participate in this mandatory data collection. Each contribution is vital to ensuring a meaningful, robust analytical response intended to allow government policy officials to better monitor trends, benchmark industry performance and raise awareness of potential issues of concern. BIS has partnered successfully with several industry sectors in the past, such as rocket propulsion, healthcare, and strategic materials, and we anticipate similar, mutually beneficial cooperation in the present collection.

Legal Protections and Requirements

BIS utilizes the Defense Production Act of 1950 (DPA), as amended, and Executive Order 13603 to both collect and protect the business proprietary information submitted by the survey respondents. Data submitted in response to this survey is restricted from public release. Public disclosure of identifiable information collected via this survey requires the specific determination from the President, Secretary of Commerce, or Under Secretary of Industry and Security that

withholding this information is contrary to the interest of the national defense. Survey response information is protected from release following Freedom of Information Act (FOIA) requests.

BIS Industrial Base Assessment Program

Since 1986, BIS has conducted over 60 assessments and 150 surveys on a wide range of topics, including the U.S. defense industrial base, microelectronics and semiconductors, healthcare products, information and communications technology (ICT), NASA's rocket propulsion sector, and strategic materials, among others. The results of most of BIS's industrial base assessments can be found here: <https://www.bis.doc.gov/dib>.

For more information on the assessment and overall program, contact Katherine Reid, Director, Defense Programs Division, and Acting Director, Defense Industrial Base Division, Office of Strategic Industries and Economic Security, Bureau of Industry and Security, Department of Commerce at SemiconductorStudy@bis.doc.gov.

Thank you for your cooperation. We look forward to working with you.