



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



U.S. Microelectronics Industry Survey and Assessment

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 to the U.S. Government 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 is needed to conduct its industry assessment under the FY 2021 NDAA Section 9904 requirements.

Your organization has been identified as part of the upstream value chain for semiconductor manufacturing equipment and/or materials, gases, and wet chemicals with touchpoints in the United States. Your organization's participation is vital to ensure a comprehensive dataset for the assessment. BIS has worked in successful partnership with industry in the past and we anticipate similar cooperation from you on this effort.

To begin, download the required Microsoft Excel formatted survey and corresponding instructions at TBD. To aid internal data collection, a PDF version of the survey can also be downloaded at this website, but make sure to only submit the Excel version of the survey. BIS analysts will contact you throughout the survey process to assist you with its completion.

To begin completion of your survey, download the Microsoft Excel-formatted survey and related instructions by clicking on the hyperlinked documents below.

U.S. Microelectronics Industry Survey (Excel)*† | U.S. Microelectronics Industry Survey (PDF)†

Complete and submit the Excel version via secure email at TBD. The PDF version is only a reference document for your internal use and cannot be submitted in place of an Excel survey.

*Note 1: Save a copy of the Excel survey to your computer before you make any inputs.

†Note 2: If, when clicking on the above links, your computer does not ask if you want to download the file to your computer, right click on the link and select "Save As."

If you have any questions regarding the survey, contact the BIS survey support staff at SemiconductorStudy@bis.doc.gov. E-mail is the preferred method of contact and will allow for a detailed response.

Please note, your organization is required by federal law (50 U.S.C. § 4555) to complete and submit the survey within 45 days of receipt of this letter. All information submitted to BIS is protected as Business Confidential under provisions of the Defense Production Act (DPA) of 1950, as amended. Information specific to your organization is barred from public release unless the President, Secretary of Commerce, or Under Secretary for Industry and Security determines that its withholding is contrary to the national defense. Such information is also protected from disclosure from Freedom of Information Act (FOIA) requests.

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