

# *The Chip Insider*<sup>®</sup>

## *2018 All Stars and Hall of Fame*

- **All Stars of the Semiconductor Industry**

- Richard Blickman
- Andy Bryant
- Tom Caulfield
- Geert Follens
- Patrick Lord
- Martijn Pierik
- Ali Salehpour
- Kazuo Ushida, Masashi Oka, & Toshikazu Umatate
- Gerald Z. Yin
- Yoshiaki Yoshida

- **New Inductees to the SEMICONDUCTOR INDUSTRY HALL OF FAME**

- Amy Gold
- Howard Moss
- Yasuo Naruke
- Jerry Sanders
- Ray Stata
- Rick Wallace
- Peter Wennink

- **Semiconductor Industry Hall of Fame Members**

# VLSIresearch's ALL STARS OF THE CHIP MAKING INDUSTRY

- These are the executives that made the most of this year
- For some, it has taken several years of methodical execution to an overarching strategy to bring this year together
- For others it was about being fleet of feet
- They will tell you they are parts of bigger teams who really made it possible
  - It's true, but these people took the point, making them the most visible for either adulation or the well-placed sniper's bullet
- They have led the industry and their companies forward, for which we can all be thankful

# VLSIresearch's 2018 All Stars of the Semiconductor Industry

**Richard Blickman** — All Star 2018: Transformed BE Semiconductor (BESI) into a highly operationally-flexible equipment supplier, that can ride assembly equipment cycles with high margins

- Recent market pullback caused 27% decline in revenues but gross margins improved
- Result of a consistent transformation of BESI into a customer-centric organization
  - Highly scalable staffing and supply-chain management
  - Very few equipment suppliers have this level of scalability
- This combined strategic positioning in high-growth assembly equipment segments has resulted in BESI being a leading assembly equipment supplier



# VLSIresearch's 2018 All Stars of the Semiconductor Industry

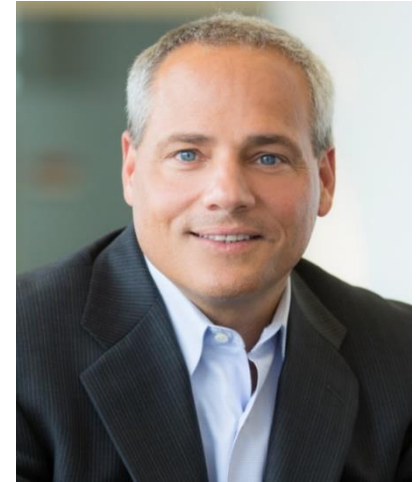
**Andy Bryant** — All Star 2018: For steering Intel through a second leadership crisis in his tenure as Chairman

- Intel continued to move forward unabated by the sudden loss of its CEO
  - Most companies would have been set adrift
  - Making him truly an All Star in 2018
- Quiet and unassuming, Andy is Intel's North Star
  - With an intimate knowledge of Intel's history, he provides a bridge from the PC era to their data-centric future
  - Linking manufacturing strategy to the market



# VLSIresearch's 2018 All Stars of the Semiconductor Industry

- Tom Caulfield — All Star 2018:** For the strategic pivot that scaled back GLOBALFOUNDRIES' from a me-too strategy to focus on its differentiated technology
- It takes guts to scale back a company for sustainable profitability
    - Even though Tom was the new exec on the job, he was an insider, which makes it even more remarkable
    - The company had been built on an unsustainable dream of being on the bleeding edge
  - Tom's Pivot brought back customer confidence in GF's sustainability
    - Essential in the foundry model, because customer development windows are long and risky



# VLSIresearch's 2018 All Stars of the Semiconductor Industry

**Geert Follens — All Star 2018** : Promoted a clear strategy for Edwards to position itself as a strong and more sustainable industry leader that is closer to its customers

- Acquisitions of CSK and Brooks CTI and Polycold product lines extended Edwards' position in the semiconductor marketplace
- Development and expansion of key account teams that are positioned close to the customer to ensure they fully understand and respond to their needs
- Increased investment in core R&D, engineering, and manufacturing resources
  - Edwards recently opened a significant expansion to its Qingdao factory in China to manufacture semiconductor dry pumps
- Leading Edwards in style to run past the milestone-marking 100 years of providing vacuum solutions to its customers



# VLSIresearch's 2018 All Stars of the Semiconductor Industry

**Patrick Lord — All Star 2018:** Delivered substantial growth to Lam Research's installed base business, both in Service & Parts, as well as in the 200mm and refurbished equipment business

- Growth of Lam's installed base business has matched the systems business for last two years
- A new business model to take care of installed equipment base
  - Delivering value through contracts, service, and parts
  - Incorporating strong growth of 200mm equipment and refurbished 300mm equipment
- Patrick has provided a strong roadmap for equipment suppliers to build substantial and growing installed base business



# VLSIresearch's 2018 All Stars of the Semiconductor Industry

**Martijn Pierik — All Star 2018:** Rebuilt the value proposition that an industry-focused PR agency can deliver

- As a result, Kiterocket has become the only brand and communications agency with international capabilities to deliver global messaging across all communications' platforms
  - New form of agency true to its Mathews & Clark heritage
  - Capabilities to support its customers in increasingly critical local Asian markets and customers
- With Kiterocket, Martijn has been able to bring back the importance and value that the PR agencies of old created in the semiconductor manufacturing space



KITEROCKET



# VLSIresearch's 2018 All Stars of the Semiconductor Industry

**Ali Salehpour — All Star 2018:** Leadership with Applied Global Services and Display Business has driven Applied Materials' growth in 2018

- Both businesses have contributed by growing faster and maintaining strong Applied Materials' growth cycle
- Both AGS and Display are positioned to outperform the market with new value-added products and world-class operations to capture opportunities
- Ali has long history and experience in the industry as a high-performing executive



# VLSIresearch's 2018 All Stars of the Semiconductor Industry

**Kazuo Ushida, Masashi Oka, & Toshikazu Umatate** — All Stars 2018: For planning and executing a major turnaround at Nikon to deal with the shifting market realities in the camera and scanner markets

- They made a radical pivot in 2016: Abandoning revenue growth at any cost in favor of bringing profitable value to their markets
  - They focused on vision, right-sizing, strategic sales management, and making each group a profit center over the skipping-stone strategic-growth model
  - Rightsizing the lithography group was corporate brain surgery at its best
  - Operating profit was up >1700% in FY 2018



*At the heart of the image™*

# VLSIresearch's 2018 All Stars of the Semiconductor Industry

**Yoshiaki Yoshida** — All Star 2018: Created a vision for adding customer value in the evolving semiconductor value chain under his “Grand Design” and Mid-Term Plan

- Reinforces Advantest's core businesses while seeking operational excellence and expanding with integrated solutions
- Broadens its business domain to include related markets such as semiconductor design and evaluation processes and product/system level test processes
- Long-term vision on four strategic issues:
  - Reinforcing core businesses and investing strategically
  - Seeking operational excellence
  - Exploring value to reach the next level
  - Pioneering new business fields
- Results in 2018 speak for themselves as Advantest has clearly outpaced the Test and Measurement markets



**ADVANTEST**<sup>®</sup>

# VLSIresearch's 2018 All Stars of the Semiconductor Industry

**Dr. Gerald Z. Yin — All Star 2018:** Vision of growing AMEC into a world-class equipment supplier has become reality as the company strengthens its foothold at major global IDMs

- AMEC is not just a respected supplier of Etchers to domestic Chinese customers, but also to global chipmakers in key regions outside China
- For two consecutive years, the company has outperformed its served markets (Etch and MOCVD) in a hypergrowth environment
- With outstanding operating standards and deep commitment to customer satisfaction, AMEC is the first Chinese equipment supplier to appear in VLSI's 10 BEST



# VLSIresearch's

## SEMICONDUCTOR INDUSTRY HALL OF FAME

- For executives who have made systematic contributions to the semiconductor industry\*
  - Whose contributions advanced
    - Customers
    - Technology
    - Moore's Law
    - Business Fundamentals
  - Without them, our industry would be much smaller
    - And would have had a much smaller impact on everyone's lives around the globe
- Amy Gold
  - Howard Moss
  - Yasuo Naruke
  - Jerry Sanders
  - Ray Stata
  - Rick Wallace
  - Peter Wennink

\* The Hall of Fame was opened up to contributors outside manufacturing in 2016.  
Please bear with us while we catch up with executives of historical interest.

# New Inductee to **VLSI**research's Semiconductor Industry Hall of Fame

**Amy Gold** — HoF: Trusted advisor to Advantest for all U.S. matters

- Amy has always been under the radar in these roles and her unassuming approach has won Japan's trust
- Performed as guide for Advantest executives to be listed in New York Stock Exchange in 2001
  - Gained the respect of leading Wall Street Analysts
  - Key to turning their views on Advantest to buy positions
- Amy's work in the U.S. built the confidence of executives to execute the multi-cultural merger with Verigy (*the HP ATE spinout*)
  - As a result Advantest became largest test and related equipment supplier in the world



**ADVANTEST**<sup>®</sup>

# New Inductee to **VLSI**research's Semiconductor Industry Hall of Fame

**Howard Moss — HoF:** For opening up western frontier of semiconductor industry to America's space program

- Charged with finding chips reliable enough to withstand rigors of space
  - None of eastern electronics companies made the grade
  - TI's Pat Haggerty demonstrated they could, with a transistor radio playing in a beaker of boiling water
    - An early proof of how consumer volumes could be used to yield extreme quality grades
  - Moss, then with the U.S. Army's Signal Corp, had the guts to write a check to TI on the spot





# New Inductee to **VLSI**research's Semiconductor Industry Hall of Fame

**Yasuo Naruke** — **HoF**: For maintaining NAND memory market competitiveness by ensuring successful creation of the independent Toshiba Memory Corporation

- Financial failure of Toshiba could have had major impact on NAND flash market, taking out both Toshiba and Western Digital
  - Naruke-san weathered many dark days where in its final throes deals came close and then fell apart
- This success caps many great accomplishments over Naruke-san's career that have worked to keep Japan's chip industry in a leadership position

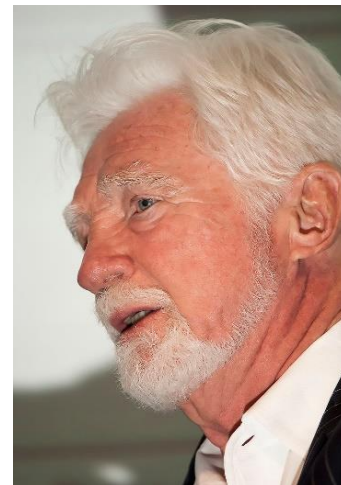


**TOSHIBA  
MEMORY  
CORPORATION**



# New Inductee to **VLSI**research's Semiconductor Industry Hall of Fame

- Jerry Sanders III — HoF:** For creating the semiconductor sales model and the people-first model
- Among Silicon Valley's Kings, Jerry stands out as the sales professional
    - His model, engineering with charisma
    - But this was not enough to build companies
  - Founding AMD, focused on building a company that every one wanted to work for
    - Motto: "People first, products and profit will follow!"
    - "Cradle-to-grave" strategy engendered loyalty by not laying off employees in downturns like others had
    - Result was innovation productivity that allowed AMD to match companies many times their size with a fraction of the financial resources



# New Inductee to **VLSI**research's Semiconductor Industry Hall of Fame

**Ray Stata** — **HoF**: For creating the analog semiconductor business model

- Having founded Analog Devices in 1965 and still Chairman of the board, few can claim such longevity in the top spot
  - Secret was a ruthless focus on winds of change in analog while never being seduced by digital sirens
    - Starting in op-amps, moving on to converters, and staying in the analog sweet-spot of mixed signal by offering a complete signal chain
    - With strict attention to organization agility as an innovation strategy
      - Which enabled Analog Devices to capture markets on a broad scale by breadth of organization and not on individual ‘think of something’ strategies



# New Inductee to **VLSI**research's Semiconductor Industry Hall of Fame

**Rick Wallace — HoF:** Incredibly focused and steady leader that has made KLA-Tencor the best financially-performing Semiconductor Equipment company

- KLA may have not seen hyper-growth of etch and deposition but its financial performance is outpacing all of its industry peers
- This is a result of Rick's unwavering focus on finding customer problems and providing KLA's technology solutions



# New Inductee to **VLSI**research's Semiconductor Industry Hall of Fame

**Peter Wennink — HoF:** Provided business acumen to get EUV program into a commercial success

- While technology and engineering is critical to EUV success, managing complex EUV program business model demonstrates a skill very few individuals have
- Task of managing expectations of all stakeholders around EUV program has been enormous
- Without Peter EUV would have not been possible from business perspective



**ASML**

## SEMICONDUCTOR INDUSTRY HALL OF FAME

Aart de Geus (2012)	Gordon A. Campbell (2016)	Mark Bohr (2006)	Rick Wallace (2018)
Alex d'Arbeloff (1993)	Gordon Moore (2016)	Mark Durcan (2017)	Robert Boehlke (2005)
Amy Gold (2018)	Haruo Matsuno (2014)	Martin van den Brink (2006)	Robert Graham (1993)
Andrew Grove (2016)	Howard Moss (2018)	Mike Bradley (2013)	Robert Holzel (1993)
Andy Bryant (2016)	Irwin Jacobs (2017)	Mike Cadigan (2008)	Robert Noyce (2016)
Arthur del Prado (1993)	James Bagley (1994)	Mike Polcari (2009)	Robin Saxby (2017)
Arthur Zafiropoulo (1994)	James Morgan (1993)	Mike Splinter (2007)	Roger Emerick (1993)
Barry Rapozo (2006)	Jean LeMoin (1994)	Morris Chang (2016)	Sanjay Jha (2017)
Bill Holt (2015)	Jensen Huang (2017)	Paolo Gargini (2009)	Shoichiro Yoshida (1993)
Bob Huston (2006)	Jerry Sanders III (2018)	Papken Der Torossian (1994)	Steve Newberry (2011)
C. Scott Kulicke (1994)	Jon Tompkins (1996)	Patrick E. Haggerty (2016)	Sunlin Chou (2006)
Charlie Sporck (2016)	Karl Nicklaus (1994)	Patrick Lam (2006)	Terry Higashi (2005)
Dan Maydan (1996)	Kazuo Ushida (2007)	Paul Otellini (2017)	Tetsuo (Tom) Tsuneishi (2015)
Egon Putzi (2006)	Ken Levy (1995)	Peter Wennink (2018)	Tokuo Kubo (1993)
Eric Meurice (2008)	Ken Schroeder (1996)	Randhir Thakur (2012)	Toshio Maruyama (2009)
Gary Dickerson (2006)	Kouichi Uehara (2007)	Ray Thompson (2006)	Walt Mathews (1995)
Gary Heerssen (2012)	Larry Sumney (2009)	Ray Stata (2018)	Winfried Kaiser (2008)
Gary Patton (2016)	Lisa Su (2017):	Richard Blickman (2011)	Yasuo Naruke (2018)

## All Stars of the Semiconductor Industry

Aart de Geus (All Star, 15)	Doug Grose (All Star, 05)	Jim Gentilcore (All Star, 13)	Mike Splinter (All Star, 04 07 13)	Sass Somekh (All Star, 94)
Abdul Lateef (All Star, 13)	Egon Putzi (All Star, 04)	John Kelly (All Star, 14)	Mord Weisner (All Star, 96)	Seiichi Takikawa (All Star, 94)
Ali Salehpour (All Star, 18)	Eric Meurice (All Star, 06 12)	Jon Tompkins (All Star, 95)	Morris Chang (All Star, 11)	Shoichiro Yoshida (All Star, 95)
Andre-Auberton Herve (All Star, 07)	Erich and Aya Maria Thallner (All Star, 14)	Karen McLennan (All Star, 96)	Neil Bonke (All Star, 96)	Steve DeOrnellas (All Star, 95)
Andy Bryant (All Star, 18)	Ernie Godshalk (All Star, 04)	Kathy Price (All Star, 96)	Oh-Hyun Kwon (All Star, 08)	Steve Newberry (All Star, 04)
Archie Hwang (All Star, 05)	Frits van Hout (All Star, 15)	Kazuo Ushida (All Star, 07 18)	OmKaram (Om) Nalamasu (All Star, 17)	Sundar Ramamurthy (All Star, 14)
Arthur Zafiropoulo (All Star, 93 96 12)	Gary Dickerson (All Star, 05 13)	Keith Barnes (All Star, 08)	Paolo Gargini (All Star, 08)	Terry Higashi (All Star, 07 13)
Asher Levy (All Star, 16)	Gary Hillman (All Star, 93)	Ken Levy (All Star, 96)	Papkin Der Torossian (All Star, 93 96)	Tim Moriarty (All Star, 17)
Atsushi (Art) Horiba (All Star, 17)	Gary Patton (All Star, 12)	Ken Schroder (All Star, 96 04)	Patrick Lam (All Star, 93)	Tom Caulfield (All Star, 16 18)
Barry Mayer (All Star, 15)	Geoff Wild (All Star, 13)	Kenneth L. Schroeder (All Star, 95)	Patrick Lord (All Star, 18)	Tom Kubo (All Star, 96)
Bill Holt (All Star, 13)	Geert Follens (All Star, 18)	Kevin Conlon (All Star, 96 11)	Paul Boudre (All Star, 15)	Tom Newsom (All Star, 96)
Bob Bruck (All Star, 12)	Gerald Z. Yin (All Star, 18)	Larry Murphy (All Star, 05 06)	Paul Otellini (All Star, 08)	Tom Sonderman (All Star, 05)
Brad Mattson (All Star, 96)	Graham Miller (All Star, 94)	Lee Wai Kwong (All Star, 17)	Paul Rawlings (All Star, 15)	Tom Tsuneishi (All Star, 14)
Brian Krzanich (All Star, 12)	Gregory Smith (All Star, 15)	Lucas van Grinsven (All Star, 08)	Peter Wennink (All Star, 17)	Tony Kawai (All Star, 17)
Brian Trafas (All Star, 13)	Haruo Matsuno (All Star, 12)	Luis Müller (All Star, 17)	Randall Hughes (All Star, 94)	Toshikazu Umatate (All Star, 18)
Bruno Guilmart (All Star, 12)	Hector Ruiz (All Star, 08)	Lynn Neillie (All Star, 94)	Randhir Thakur (All Star, 11)	Toshio Maruyama (All Star, 04)
C. Scott Kulicke (All Star, 95 96)	Heinz Kundert (All Star, 16)	Mark Bohr (All Star, 05 16)	Reinhart Richter (All Star, 11)	Trevor Norman, (All Star, 12)
Chandra Mouli (All Star, 05)	Herbert Blaschitz (All Star, 14)	Mark Jagiela (All Star, 14)	Richard Aurelio (All Star, 04)	Wally Rhines (All Star, 15)
Charlie Lewis (All Star, 96)	Irwin Pfister (All Star, 93)	Martin Anstice (All Star, 12 14 15 17)	Richard Blickman (All Star, 07 18)	Wasuke Nakano (All Star, 05 06)
Chris Koliopoulos (All Star, 04 05)	Israel Niv (All Star, 94 11 15)	Martijn Pierik (All Star, 18)	Rick Wallace (All Star, 06 15)	Willem Marris (All Star, 94)
Chuck Del Prado (All Star, 14)	J.K. Park, (All Star, 16)	Mary Puma (All Star, 14)	Robert Akins (All Star, 12)	William Reed (All Star, 95)
Cliff Hou (All Star, 16)	Jack Sun (All Star, 14 16)	Masaki Kato (All Star, 11)	Robert Boelke (All Star, 96)	William Spencer (All Star, 93)
Dan Maydan (All Star, 95 96)	James Bagley (All Star, 93 95 96)	Masashi Oka (All Star, 18)	Robert Graham (All Star, 94)	Yaron Barkan (All Star, 15)
David Wang (All Star, 93 96)	James Morgan (All Star, 95 96)	Michael L. Parodi (All Star, 94)	Ross Young (All Star, 94)	Yasushi Akao (All Star, 11)
Deirdre Hanford (All Star, 17)	Jan Lipton (All Star, 93)	Mihir Parikh (All Star, 95)	Sanjay Jha (All Star, 14)	Yoshiaki Yoshida (All Star, 18)
Dennis P. McGuirk (All Star, 13)	Jean LeMoin (All Star, 93 95)	Mike Cadigan (All Star, 05)	Sass Someckh (All Star, 96)	



# Thank You

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