

SUPPLY-CHAIN PERFORMANCE SUBCOMMITTEE MINUTES

Date: August 21, 2007
Location: Volterra Semiconductor Corporation
Time: 2:00pm – 3:00pm (PST)

Participants:

Chelsea Boone - FSA
Ed Pausa - PricewaterhouseCoopers LLP
Jay Seaton - Ambric, Inc.
Joe Holt - Integra Technologies LLC
Edward Smith - Salvador & Smith Associates
Roger DeAmicis - ChipX, Inc.
Matt Cheatham - Grant Thornton
Mathew Pulickel - Grant Thornton
Eelco Bergman
Dan Wark - Volterra Semiconductor Corporation

Meeting Purpose:

- To discuss Q3 2007 Wafer/Back-End Pricing Survey Results
- Review participant comments – identify additional outliers
- Address new concerns/modifications

Actions Completed/Items Discussed:

- Are there any outliers in the Q3 2007 interactive results (wafer, mask, test, assembly, wafer bump) that need to be deleted?
- Should any of the data that was confirmed by Grant Thornton be deleted?
- What new concerns/requests have been voiced by our participants/subscribers?
- Are there any additional questions/features that need to be added to the Survey/Report?

End Result/Conclusions:

- Wafer Section: Grant Thornton will validate the "6" masks in line 8 in the participant comment Excel spreadsheet. Committee decided that the filter needed to change to a min value of \$1250 and \$1000 for 0.13um and 0.15um, respectively; however, when FSA went back and checked our current filters, they had already been changed to a min value of \$900 and \$900, respectively. The filter threshold in the participant comments spreadsheet was incorrect for these 2 geometries.
- Mask Section: No additional questionable data to be deleted. The filter for mask was also incorrect in the participant comment spreadsheet, as we had changed the mask filter last quarter to \$22,000 to \$1,500,000.
- Test Section: Grant Thornton will delete rows 6 & 8 in the spreadsheet (\$20 and \$10). Committee decided to also delete the \$30 record; however, FSA is keeping the \$30 record in because the committee kept it in last quarter. Grant Thornton will also delete line 5.
- Assembly Section: Grant Thornton will delete line 20.

- Wafer Bump Section: Grant Thornton will delete line 2 in the spreadsheet. We will establish filters for wafer bump after we have fielded and analyzed a few more quarters of data.
- The next subcommittee meeting will be held **the first week of November 2007** at Volterra. A meeting time will be announced soon.