

## **SUPPLY-CHAIN PERFORMANCE SUBCOMMITTEE MINUTES**

**Date:** May 21, 2007  
**Location:** Volterra Semiconductor Corporation  
**Time:** 11:00am – 12:00pm (PST)

### **Participants:**

FSA (Chelsea Boone)  
Edward Smith  
Joe Holt  
Dan Wark  
Jack Day  
Roger DeAmicis  
Jay Seaton

### **Meeting Purpose:**

- To discuss Q2 2007 Wafer/Back-End Pricing Survey Results
- Review participant comments – identify additional outliers
- Address new concerns/modifications – Test Data Analysis by Joe Holt

### **Actions Completed/Items Discussed:**

- Are there any outliers in the Q2 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: Need more IDMs to participate. No additional questionable data to be deleted.
- Mask Section: No additional questionable data to be deleted. Need to lower mask filter to \$22,000.
- Test Section: Need to delete records that contain the \$20 and \$10 hourly rate (rows 6 & 8 in GT spreadsheet).
- Assembly Section: Need to delete record with the cost per lead of "1" (row 2 in GT spreadsheet). Need to verify the record with the cost per lead of \$0.0002 (row 6 in GT spreadsheet).
- Wafer Bump Section: Delete the record with the price per wafer of \$3701 (row 2 in GT spreadsheet). Put back in the results the record with the price per wafer of \$80 (row 6 in GT spreadsheet). We will establish filters for wafer bump after we have fielded and analyzed a few more quarters of data.
- Test PPT compiled by Joe Holt: Need to determine if there is a better way to analyze the survey test data responses such that the resulting reports are more meaningful to our readers. (1) Could add the question "Price reported for a consigned tester?" to the survey (2) In the executive summary we could throw out low volumes (3) Need help from Grant Thornton establishing filters

for different segments. (4) Need to mention in executive summary that most data is from Asia. (5) Will hold a conference call with GT to discuss how they could help us do additional summarizing – establish new groupings, make “buckets” bigger, establish filters.

- Put median graphs first in interactive results.
- Eelco will review past assembly data to make sure the data is accurate and meaningful to participants/subscribers.
- The next subcommittee meeting will be held **the first week of August 2007** at Volterra. A meeting time will be announced soon.