JOINT STATEMENT OF THE 30th MEETING OF THE WORLD SEMICONDUCTOR COUNCIL (WSC)

11 June 2026
Geneva, Switzerland

The world's leading semiconductor industry associations – consisting of the Semiconductor Industry Associations in China, Chinese Taipei, Europe, Japan, Korea, and the United States – held the 30th meeting of the World Semiconductor Council (WSC) today in Geneva, Switzerland.

The meeting was chaired by Erik Rein, Executive Vice President, Board Member of Bosch Mobility Electronics and Chair of the host delegation, and included delegations from the Semiconductor Industry Associations in China, Chinese Taipei, Europe, Japan, Korea, and the United States. The delegations were chaired, respectively, by Li Wei of China Key System Co., Ltd. (SIA in China), Cliff Hou of TSMC (SIA in Chinese Taipei), Erik Rein of Bosch Mobility Electronics (SIA in Europe), Toyooki Mitsui of Kioxia Corporation (SIA in Japan), Hyouk Woo Kwon of Samsung Electronics (SIA in Korea), and Dr. Lisa Su of Advanced Micro Devices (SIA in the U.S.).

The WSC meets annually to bring together industry leaders to address issues of global concern to the semiconductor industry. The WSC's mandate is to encourage cooperation to promote fair competition, open trade, protection of intellectual property, technological advancement, investment liberalisation, market development, and sound environmental, health and safety practices. The WSC also supports expanding the global market for information technology products and services.

Established under the "Agreement Establishing a New World Semiconductor Council" signed on June 10, 1999, and amended on May 19, 2005, the WSC has the goal of promoting cooperative global semiconductor industry activities in order to facilitate the healthy growth of the industry from a long-term global perspective. This Agreement states, "the increasing globalisation of the semiconductor industry raises important issues that must be addressed effectively through international cooperation within the world semiconductor industry", and that "the WSC activities . . . shall be guided by principles of fairness, respect for market principles, and consistency with WTO rules and with the laws of the respective countries or regions of each

Member. The WSC recognises that it is important to ensure that markets will be open without discrimination. The competitiveness of companies and their products should be the principal determinant of industrial success and international trade."

The WSC seeks policies and regulatory frameworks that fuel innovation, propel business, and drive international competition and avoid any actions that distort markets and disrupt trade. Antitrust counsel was present throughout the meeting. During the meeting, the reports below were given and discussed, and related actions were approved.

I. Semiconductor Market Data

The WSC reviewed the semiconductor market report covering global market size, market growth, and other key industry trends. According to WSTS data, global semiconductor sales reached USD 795.6 billion in 2025, representing a 26.2% year-on-year (YoY) increase and marking one of the strongest annual expansions in the industry's history. AI-driven demand fuelled growth across most major markets, particularly in data centres, high-performance computing, and advanced manufacturing applications. However, top-line growth figures mask differentiation in growth performance between advanced node products and foundational chips.

Growth was led by the Asia-Pacific/All Other Regions (+45.4% YoY), including Korea (+24.1% YoY) and Chinese Taipei (+22.7% YoY), followed by the Americas (+31.4% YoY) and China (+17.9% YoY). Sales growth was more moderate in Europe (+6.7% YoY), while Japan experienced a decline of 4.3% YoY.

Looking at downstream sectors, demand for AI and advanced computing applications was the primary driver of growth. The computer segment expanded by 64.4% YoY in 2025. At the product level, MOS memory and logic devices recorded particularly strong sales growth, increasing by 39.0% and 38.8% YoY, respectively.

According to SEMI data, strong demand accelerated capacity investments and strengthened semiconductor supply chains across manufacturing, packaging, and testing operations.

II. Workforce Development

The skills shortage is a serious challenge for economies worldwide and particularly for the semiconductor industry. Especially in times of digital and green transformations the importance of semiconductors will continue to increase. This will also increase the need for more manufacturing sites and will lead to the construction of several new semiconductor manufacturing sites in various regions over the next few years. This will require many thousands of new skilled workers in design, research and development and manufacturing. In addition, manufacturing sites ("fabs") are in need of construction workers. The lack of a skilled workforce must be understood as one of the most severe risks to the sector's ability to stay ahead of competition as there is an expected demand for more than one million additional skilled workers by 2030 in the semiconductor sector.[1] A scenario based on the status quo will lead to severe gaps in the operation of fabs and, perhaps more importantly, in the design of semiconductor innovations.

A global education campaign on STEM subjects is required. This should target schools, from primary level onwards, as well as universities. Early education projects can help to increase interest and motivation in the next generation. To develop the talent and skills needed by industry, it's important that universities and industry work together to provide students with a useful education. Promoting the attractiveness of a career in the semiconductor sector for students will also be vital. The document addressing this issue, entitled "Why should students join the semiconductor industry? Four compelling reasons," has been appended to the Joint Statement as Annex 1.

Many regions currently do not have enough capability in semiconductor education. Basically, there is an insufficient number of training centres that focus on training and offer relevant study programs, often with a very specific focus area. As a result, it remains a major challenge for talented students to be able to acquire the skills needed to work in production facilities. Education in semiconductors and incentivising cooperation between countries and regions to develop a holistic talent curriculum for the semiconductor industry are of the highest importance. By introducing and promoting more exchange projects, such partnerships can be further strengthened. Failure to do so could result in severe shortages for this critical industry. **The WSC therefore urges the GAMS**

[1] https://www2.deloitte.com/us/en/pages/technology/articles/global-semiconductor-talent-shortage.html

to work with industry to promote STEM education and training to support the semiconductor industry's needs for an expanded workforce.

Public policy should promote the cooperation between all relevant stakeholders in the ecosystem, including industry, government and non-government research centres, and academia. Each stakeholder brings different core competences in education and talent development and pooling them together is essential for the semiconductor industry to train and educate talent and to sustainably attract a workforce to the industry. Specific actions urgently needed include:

- effective immigration rules and faster immigration procedures for STEM students and semiconductor workforce,
- more English-speaking STEM degrees across the world,
- early STEM education programs beginning at elementary school level,
- more public-funded industry-education partnerships, which should involve joint curriculum building and lectures delivered by industry experts at universities complementing theoretical learning,
- more degrees where students spend time both at universities and in industry to increase industry exposure,
- facilitating researchers and academics' global mobility,
- providing high school-level teacher training in microelectronics,
- promoting industry-led short-term learning experiences and massive open online courses (MOOCs),
- focusing efforts on key countries and regions, encompassing all front-end and back-end semiconductor manufacturing sites, and
- utilising experienced senior talent through rehiring or extended employment opportunities.

The WSC commits to increase female representation at semiconductor industry forums, and to avoid single-gender panels whenever possible.

III. Cooperative Approaches in Protecting the Global Environment

(1) GHGs

The World Semiconductor Council (WSC) has a decades-long track-record of voluntary perfluorinated compound (PFC) emissions reductions. In 2022, it announced a new voluntary PFC emissions reduction goal for 2030. The WSC commits to achieve a PFC reduction rate of 85% by 2030 with the baseline being 82.6% in 2022. Emission reductions will be achieved by implementing the best practices compiled by the WSC in its best practices document.

The WSC agreed to continue the existing data collection framework throughout the duration of the 2030 voluntary agreement according to the IPCC 2019 guidelines, with the objective to collect tier 2c. **2025** data according to IPCC 2019 Tier 2c methodology and AR6 global warming potential (GWP)

The WSC has also been collecting the Heat Transfer Fluids emissions data and evaluating its effects on GHG emission.

The WSC agreed to work on collecting scope 2 emissions, and to continue work toward developing a GHG goal comprising Scope 1 and Scope 2 emissions to be considered by the WSC in the future. A mid-term review of the broader GHG goal is planned for later in 2026.

The WSC aims to share industry-wide progress toward the 2030 goal. This reporting will provide aggregated results of the absolute PFC consumption and emissions as well as the emission reduction trend. These figures represent the aggregated emissions for the six WSC regional associations, in their own regions and in the "Rest of World" fabs.

The WSC supports the phase-down of non-essential uses of HFCs as required by the Kigali Amendment to the Montreal Protocol. Some HFCs are essential to semiconductor process operations and there are currently no known alternatives. **The WSC recommends that Governments/Authorities continue to provide exemptions for uses of HFCs in the semiconductor industry in implementing the Kigali Amendment in their respective jurisdictions.** For example, the U.S. legislation implementing the Kigali Amendment (the AIM ACT) provides for allocations for HFCs used in semiconductor plasma etch and chamber cleaning processes to ensure these essential uses can continue.

The WSC further recommends that Governments/Authorities exempt HFCs used in small equipment level chillers with small refrigerant charges in semiconductor operations. Semiconductor processes require extremely high levels of control in all aspects of the manufacturing process and currently known alternatives to HFCs do not have compatible properties with existing equipment level chillers.

(2) Chemical Management

As Governments/Authorities continue to work on PFAS and other chemicals of potential interest to the semiconductor industry, the WSC urges Governments/Authorities to continue fostering cooperation with the semiconductor industry to achieve environmentally beneficial results in a manner consistent with our technological and business needs while advancing the positive global socioeconomic benefits of the semiconductor industry.

The WSC is aware that governments around the world are increasingly taking action on chemicals of interest to the semiconductor industry. The WSC reiterates its recommendation that Governments/Authorities proceed thoughtfully in regulating chemicals that are essential to the semiconductor industry.

Specifically, **the WSC recommends that Governments/Authorities consider the limited potential risk of exposure from uses in the semiconductor industry, the management practices in the semiconductor industry, and the fact that these chemicals are not intended to be released from the finished product under normal conditions of use.**

The WSC further recommends that GAMS provide the semiconductor industry with sufficient time to evaluate our uses of chemicals that may be subject to potential regulation and the uses within our supply chain. If restrictions on chemicals used in the semiconductor industry are deemed to be necessary and appropriate for the protection of human health and the environment, **the WSC recommends that GAMS provide sufficient time for the industry to identify, qualify, and transition to alternative chemicals that satisfy the functional and performance requirements of the semiconductor industry, and provide exemptions to allow continuation of critical uses of these chemicals in processes and articles.** In addition, where regulations cover articles, the threshold levels in regulations should be harmonised globally and be technically feasible.

The WSC recognizes that it is important to develop a greater understanding of the uses and potential releases of PFAS in semiconductor manufacturing processes. To

better understand and predict environmental releases from continued use of PFAS, many companies and industry consortia are investing significant resources to collect data on PFAS use and releases that are facilitating the development of industry models.

The release models are complicated and highly technical in nature and require the development of industry default factors based on current science and understanding. In order for these models to be useful to both industry and Governments/Authorities, it is important that the models provide estimates that are functional, reliable, and accurate. The models will evolve over time as understanding and technologies change. The WSC plans to cooperate on developing common methods for quantifying PFAS uses and releases and will update Governments/Authorities on the best available information at its annual meeting as the data is available.

Therefore, in developing regulations on PFAS, Governments/Authorities should recognize the challenges, complexity, and time needed to quantify PFAS uses and releases.

Additionally, Governments/Authorities should continue to support research and development of methods and technologies to detect, treat, and abate PFAS in semiconductor manufacturing applications, and to accelerate the adoption of these methods and technologies, as well as to develop technologies necessary to identify high-performance alternatives that have the necessary performance characteristics with an improved environmental, health, and safety profile.

(3) Water

The WSC recognises that water plays a critical role in the semiconductor industry, that certain areas of the world experience acute water shortages, and that stakeholders are increasingly demanding responsible water management practices from semiconductor firms. Water is a non-fungible natural resource and is one of the essential resources in the semiconductor industry. The WSC Water Working Group has been working to enhance water utilisation efficiency by defining a common water reuse rate formula, sharing best practices for water utilisation efficiency and establishing a standard template for data collection. Specifically, it has developed a mechanism for collecting water recycling rates across the 5 associations, referring to international standards. 2024 data on water recycling rates were collected as a case study to confirm the data format, and 2025 data are being collected, along with water consumption data, expressed as the volume of water consumed per surface area of wafer produced.

(4) Safety and Health

The WSC affirms that the safety, health, and wellbeing of people are foundational to a resilient and sustainable semiconductor industry. The WSC promotes a proactive, prevention-focused approach to safety and health, striving to foster workplace environments where every employee can work safely, healthily, and with confidence.

Across the industry, semiconductor companies systematically collect and analyse safety & health data as an essential tool to strengthen performance, share learnings, and continuously advance leading practices. Through collaboration and transparency, the WSC encourages ongoing improvement and the adoption of high standards worldwide.

Five regional associations have contributed aggregated safety & health data to the WSC, underscoring a shared commitment to collective learning and progress. The WSC aims to present the results for the reporting year 2025 at the JSTC/GAMS meeting in October 2026.

IV. Effective Protection of Intellectual Property, fighting the proliferation of semiconductor counterfeiting

(1) Patent Quality - Cooperation with WIPO and IP Litigation Transparency

Patent quality is essential to innovation and controlling abusive patent litigation in the semiconductor industry. The WSC commends the World Intellectual Property Organization for its efforts to collect and publish metrics bearing on patent quality across jurisdictions, which can be a useful tool in monitoring patent quality. An important issue for WSC stakeholders concerns the paucity of data about IP-related litigation globally and among the GAMS regions in particular. The WSC believes that improved visibility into international IP litigation would lead to a better understanding of this important area and potentially to enhanced innovation, reduced costs and obstacles, and better protection of IP worldwide.

While WIPO has been able to collect and publish international data on patent applications, processing, grants, and post-grant review by patent offices, it has been unable to collect data in the important area of patent litigation in the courts, despite

various efforts to do so, as there is no standard process for monitoring and collecting such data internationally. The WSC is hopeful that governments/authorities can assist in resolving this data gap by establishing necessary collection procedures. Mindful of GAMS encouragement of a meeting of technical experts on this issue, WSC representatives met with WIPO officials in Geneva prior to the WSC meeting, including technical experts in IP statistical collection and global IP litigation, to discuss this issue among other IP topics. The WSC and WIPO agreed to continue dialogue on seeking a pathway to transparency in international patent litigation statistics, namely the collection and publication of comparable statistics in major regions.

In pursuit of the goal of transparency in global IP litigation, while continuing engagement with WIPO at the industry level, the WSC recommends that governments/authorities work with WIPO to explore ways to facilitate WIPO's collection of relevant data on post-grant reviews and patent litigation in the courts on a regular basis such that stakeholders will have some visibility to global IP litigation statistics and trends that are consistent and comparable.

(2) Abusive Patent Litigation

The WSC recognises that abusive patent litigation seriously undermines innovation by redirecting resources to unnecessary litigation expenses and makes it more difficult for companies to bring legitimate products to market. **The WSC encourages GAMS to support the WSC Best Practices to Combat Abusive Patent Litigation and implement rules and policies to achieve these best practices**.

The WSC takes note of the growth of third party-financed patent infringement litigation, and, when such litigation is abusive, the potential for adverse effects on the patent system, including diversion of resources from judicial and administrative mechanisms that support a healthy patent system and billions of dollars in assets from innovative manufacturers to often unknown investors. **The WSC encourages GAMS to enhance transparency through disclosure and other forms of accountability to minimise any negative effects of such litigation finance models.**

(3) Fighting the Proliferation of Semiconductor Counterfeiting

Counterfeit semiconductor products continue to create serious risks to public health and safety, critical infrastructure, and the commercial success of semiconductor rights holders. The WSC's commitment to promoting practices that effectively counter

semiconductor counterfeiting complements its broader efforts to protect intellectual property.

The WSC recommends that GAMS members continue to implement IP enforcement countermeasures—domestically, bilaterally and multilaterally—including to address counterfeit semiconductors and the resultant harms. The WSC supports GAMS coordination with their customs and law enforcement authorities, and facilitation of consultation with industry, to increase the efficacy of IP enforcement.

V. Semiconductor standards and relevant regulations

The WSC continues to encourage the GAMS to ensure that the regulatory framework for Encryption is consistent with the WSC Encryption Principles, as they emphasise market access, transparency, adoption of international standards, and non-discriminatory and open procedures and rules for commercial encryption.

In line with GAMS, the WSC underscores the importance of meaningful stakeholder participation whenever regulations, administrative procedures, or certification requirements on the importation or use of commercial encryption are created or revised.

In addition, the WSC reiterates support for the GAMS statement, made in the 2024 GAMS Chair's Summary, that *"Voluntary consensus-based international standards adopted through open procedures are the optimal way to achieve rigorously scrutinised and broadly studied cryptographic technology and facilitate trade in line with the WSC Principles".*

Indeed, open markets and the application of international standards ensure the worldwide availability of the most robust and trusted security solutions and support the diffusion of emerging encryption technologies.

The WSC welcomes the GAMS' continued commitment to reviewing of the global regulatory environment for products with encryption, through the regular sharing of information, analysis and assessment of relevant measures.

The GAMS exchange of information has yielded positive results, increasing mutual understanding and further ensuring transparency.

The WSC welcomes the invitation by GAMS "to reflect on additional relevant regulations and standards impacting the semiconductor industry that warrant additional information exchange and discussions" and to "hold a workshop in 2026 on these issues".

The WSC welcomes the decision by GAMS to hold a workshop in October 2026, and encourages the GAMS to focus, in the workshop, on semiconductor standards and relevant regulations.

VI. Customs and Tariffs

(1) Trade Policies

For decades, semiconductor technology has maintained exponential performance growth, transforming society, and entire industries, at a rapid pace. Semiconductors have become essential components of virtually every electronic devices, enabling the green and digital transitions and powering countless critical downstream applications. All along, trade policies have played a key role in supporting semiconductor growth. The WSC would like to emphasise that, for semiconductor companies, certainty regarding the conditions at which they can trade is an essential prerequisite for success. Hence, **the WSC calls on GAMS to create a more predictable trade environment, and to negotiate expeditious resolution to trade challenges**. We urge GAMS to consult closely with industry, and the WSC stands ready to support GAMS to achieve positive outcomes.

(2) WTO Moratorium on Customs Duties

The WSC expresses its disappointment that World Trade Organization (WTO) members failed to reach an agreement to extend the moratorium on customs duties on electronic transmissions, or permanently prohibit such duties, during the WTO Ministerial Conference in Yaoundé, Cameroon from 26 to 30 March 2026. As a consequence of such failure, the long-standing moratorium expired. The WSC is gravely concerned that countries may decide to charge duties for digital transmissions, including downloads, software updates, or cross-border data flows.

The moratorium ensured digital transmissions could flow freely across borders—without tariffs or additional red tape and added costs. In particular, the long-

standing WTO agreement not to impose customs duties on electronic transmissions has greatly contributed to the growth and development of the semiconductor industry as well as the growth of the digital economy, and strengthened supply chain resilience. The seamless movement of semiconductor data across borders is essential to the healthy functioning of global semiconductor supply chain. Semiconductor companies in every segment of the industry rely on the constant flow of semiconductor research, design, process data and software to enable their production flows and supply chains for critical products. The imposition of customs procedures and import duties on the flow of semiconductor data – to include design data, software, chemical formulations, manufacturing information, and other development data – would increase costs and lead to shipment delays and other disruptions to these critical supply chains.

The WSC calls for the immediate reinstatement of the WTO moratorium on customs duties on electronic transmissions and urges GAMS to work with the other WTO members on an agreement to reinstate the moratorium and develop a permanent WTO agreement that ensures electronic transmissions, including semiconductor-related data and digital tools, remain free from customs duties and procedures. As part of this critical effort, we encourage GAMS to join or publicly support the joint statement on the moratorium on customs duties on electronic transmissions co-sponsored by a plurilateral group of WTO members.

VII. Regional Support Programs

The WSC continues to support vigilant adherence to the GAMS Regional Support Guidelines and Best Practices (Guidelines) and WTO rules, developed by the WSC and adopted by the GAMS in 2017. The Guidelines reflect the WSC's shared view that regional support in the semiconductor sector should be transparent, non-discriminatory, and non-trade/investment distorting; that government/authorities actions should be guided by market-based principles and expectations regarding long-term rates-of-return and levels of risk; and that the competitiveness of companies and their products, not the intervention of governments and authorities, should be the principal drivers of innovation, industrial success and international trade.

The WSC continues to encourage increased transparency through the regular sharing of information, analysis, and assessment of subsidies and other forms of support as critical to avoiding non-market-based support that can lead to excess capacity that is not commercially justified, create unfair competitive conditions, hinder innovation, and undermine the efficiency of global value chains.

Past GAMS information exchanges on regional support programs has had some notable success, filling the gaps caused by shortfalls in the WTO's subsidy notification process. The WSC and GAMS have reviewed 42 semiconductor-related programs in two phases of information exchange (Phase 1 and Phase 2). A third phase (Phase 3) of the regional support information exchange on an additional 12 semiconductor-related programs was initiated at the WSC meeting in 2023. These Phase 3 programs were reviewed at GAMS Workshops on Regional Support Programs in Berlin in 2024 and again in Busan in 2025. The WSC takes note that the GAMS did not indicate an intention to hold a Regional Support Workshop at the 2026 GAMS meeting in Sapporo, Japan.

The WSC welcomes the GAMS discussions regarding the merits of continued information exchanges on regional support programs, particularly in light of the different understanding of the definition and scope of regional support programs across the GAMS. It is the view of the WSC that the challenges of continued information exchanges on regional support programs can only be solved at the GAMS level.

To that end, the WSC appreciates the GAMS convening an intersessional meeting in Geneva to explore an appropriate path forward, and await additional guidance from the GAMS to ensure a meaningful 2026 GAMS meeting. Such guidance should include, for example, whether the GAMS intends to continue the exchange of information on Phase 3 programs, whether to initiate a fourth phase of information exchanges on additional regional support programs or whether to move the exchange of information to an informal or ad hoc exchange.

VIII. Global Supply Chain

The WSC remains committed to deepening the understanding of the global supply chain for the semiconductor industry, with the aim to preserve the healthy functioning of the global supply chain. In this regard, the WSC appreciates the GAMS acknowledgement that no single region can replicate all elements of the global supply chain for semiconductors.

As part of this effort, the WSC compiled a report comprised of semiconductor global supply chains, comprising conceptual takeaways from jointly identified publications relating to the semiconductor global supply chain. Individual associations highlighted certain takeaways from these reports, including that semiconductor supply chains are interdependent and there is some limit to fab substitutability. The industry also faces challenges including talent shortages, which may become more acute with

new investments from all the major semiconductor economies to meet AI-driven demand. Associations also highlighted the need for better data to inform decisions by both policymakers and business leaders, and the existence of vulnerabilities in semiconductor supply chains - in some cases exacerbated by government policies. Enhancing the resilience of the global supply chain requires strengthened multilateral co-operation and effective information sharing.

The WSC looks forward to continued engagement with GAMS to further strengthen global supply chain resilience, while supporting a policy environment that encourages collaboration, openness, innovation, and trust. ***The WSC encourages GAMS to take proactive steps to increase the stability and predictability of the policy environment impacting global semiconductor supply chains.***

IX. Approval of Joint Statement and Approval of Recommendations to GAMS

The results of today's meeting will be submitted by representatives of WSC members to their respective governments/authorities for consideration at the annual meeting of WSC representatives with the Governments/Authorities Meeting on Semiconductors (GAMS) to be held in October 2026 in Sapporo, Japan.

X. Next Meeting

The next meeting of the WSC will be hosted by the Semiconductor Industry Association in China in Shanghai, China, in May 2027.

XI. Key Documents and WSC Website:

All key documents related to the WSC can be found on the WSC website, located at: http://www.semiconductorcouncil.org. Information on WSC member associations can be found on the following websites:

Semiconductor Industry Association in China:

http://www.csia.net.cn

Semiconductor Industry Association in Chinese Taipei:

http://www.tsia.org.tw

Semiconductor Industry Association in Europe:

http://www.eusemiconductors.eu

Semiconductor Industry Association in Japan:

https://semicon.jeita.or.jp/index_e.html

Semiconductor Industry Association in Korea:

http://www.ksia.or.kr

Semiconductor Industry Association in the US:

http://www.semiconductors.org