



iNEMI

International Electronics Manufacturing Initiative

**iNEMI
Technology
Roadmap:
Concluding
Thoughts**

***Session Chair:
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Advancing manufacturing technology

Strategic Infrastructural Changes

供应基础的战略性变化

- The restructuring of the electronics industry over the last decade from vertically integrated OEMs to a multi-firm supply chain has resulted in a disparity in R&D needs versus available resources.过去十年电子工业由纵向的综合的OEM制造演变为多厂商供应，导致研发需求和现有资源的差距
- Restructuring has created skill gaps at various nodes of supply chain.这种结构性的变化造成供应链各环节技能上的差异
- Critical needs for research and development exist in the middle part of the supply chain (IC assembly services, passive components and EMS assembly) and yet these are the firms least capable of providing the resources.供应链的中段（IC装配、被动器件和EMS装配）尤其需要开展技术研发，而这些环节所能投入的研发资源也最少。
- A partial solution has been the development of vertical teams to develop critical new technology while sharing the costs.一种解决方法是建立纵向的合作团队来研发新的技术并分摊费用。

Concluding Thoughts

Impact of the Recession 经济衰退的影响

- **Strengthening of vertical development teams (across design / supply chain)**
增强纵向的研发团队（贯穿设计/产业链）
- **Will delay new technologies requiring significant investments (both capital and R&D)**
需要巨大投资（资金和研发）的某些新技术会被延迟
- **Increased consortial activity on environmental efforts (reduce total industry investments)**
增强联盟对环境问题的支持活动（降低业界总体的投入）
- **Industry must work together to determine their priorities for closing Technology Gaps**
业界必须一起来决定和解决那些重要的技术差距

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