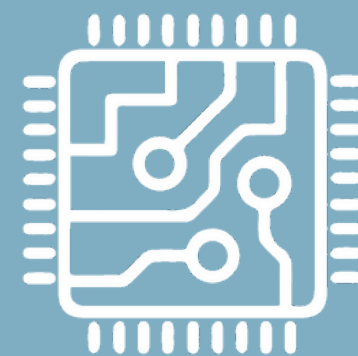
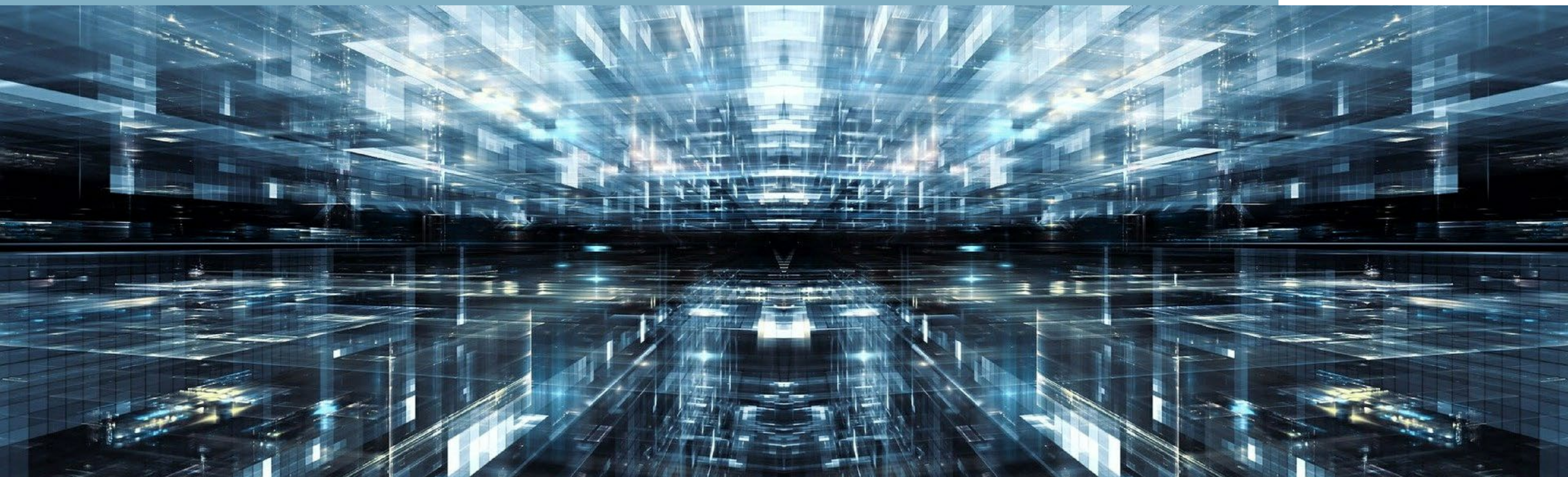


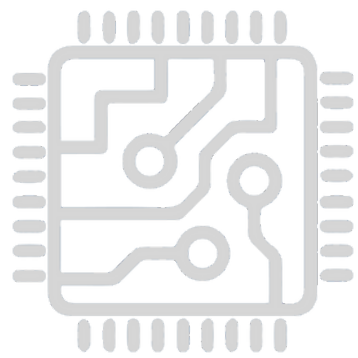
SPAIN'S DIGITAL INVESTMENT HUB



#PERTECHip MICROELECTRONICS & SEMICONDUCTORS
INSIDE Connect 2025



PERTE Chip



One of the most ambitious semiconductor projects in the European Union

✓ 10B€

MOBILIZED INVESTMENT

0.9% GDP 

0.2% 

0.5% 

0.1% 

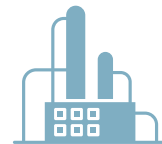
ALONG 4 COMPONENTS



Scientific capacity



Design strategy



Fabrication plants



ICT industry

INSTRUMENTS

- Grants
- Equity
- Loans
- Cooperation agreements

PROJECTS TYPES

- R&D projects
- Design and manufacturing facilities
- Investments in public research infrastructures

STRATEGIC ASSETS

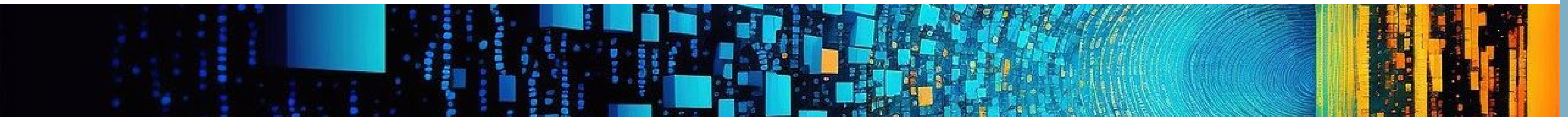
RISGV

integrated photonic

Quantum computing

Semiconductor scientific capabilities

End-user industry





Spanish semiconductor areas of expertise



RISC- V and High -Performance Computing (HPC)

1 B€ mobilized for RISC-V

Main players

Barcelona Supercomputing Center

World's 8th most powerful supercomputer, AI ready.
Leading RISGV R&D center



RISGV design center

800 M€

Semidynamics

47 M€
RISGV cores



Openchip

115 M€ for HPC accelerators
60M€ for HPC cores



Integrated photonics

Leading end-to-end Photonic Sector in the EU. Involving investments higher than 400M€, Leading the **European Integrated -Photonics Pilot line (PIXEurope)**

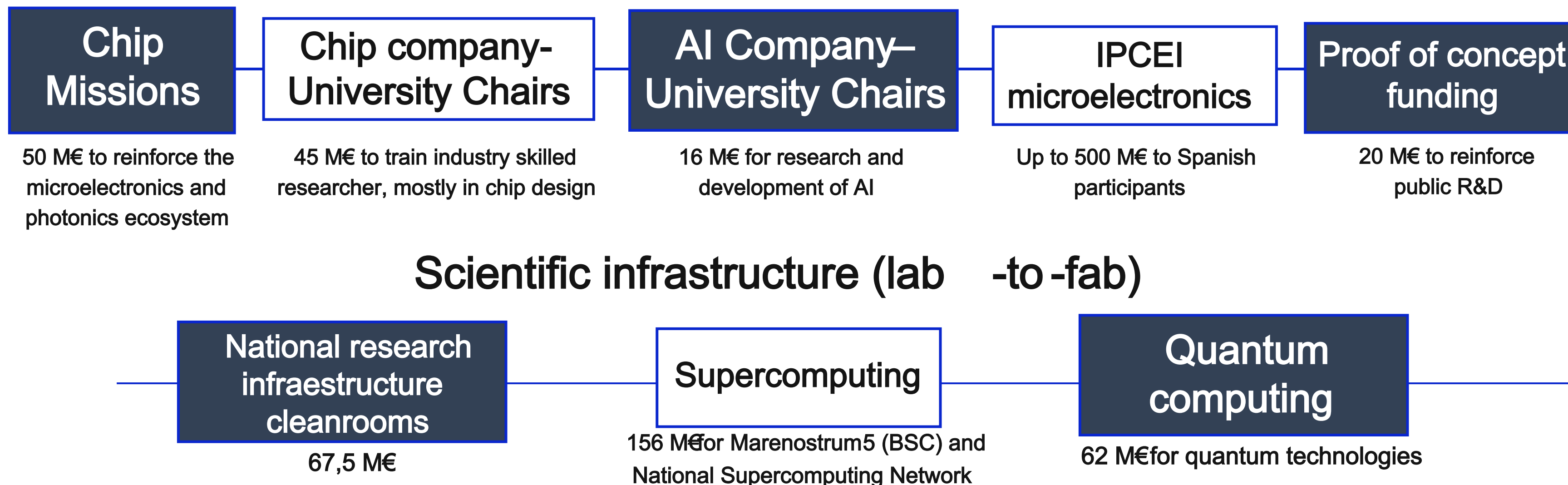
Vibrant leading edge photonic fabless ecosystem around **III-V, Silicon Photonics or QKD**





PERTE Chip programmes

Programmes (R&D and Talent)



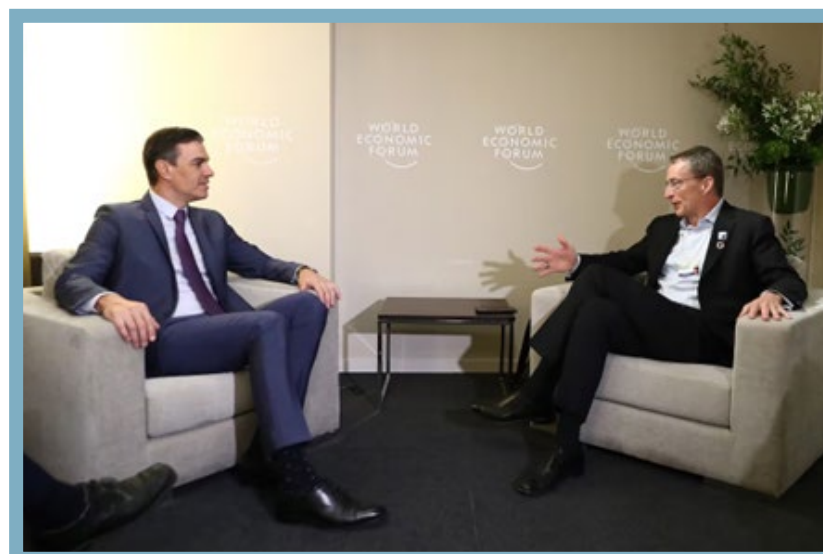


Strategic investments

Intel-BSC Lab
engagement



May 2022



CISCO
First EU Chip design
center.



Nov 2022



IMEC
Advanced R&D fab
in Spain

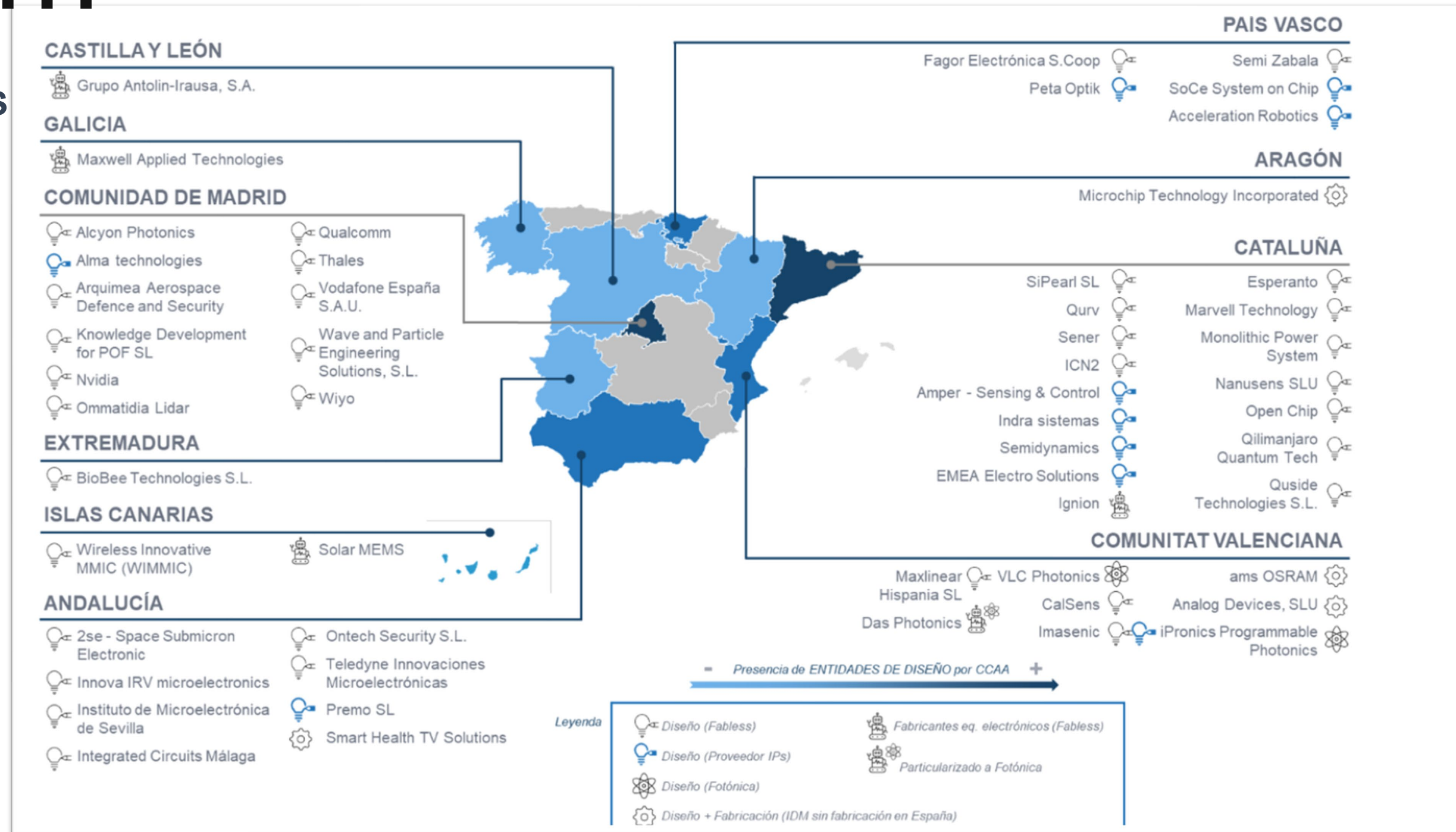


Jul 2024



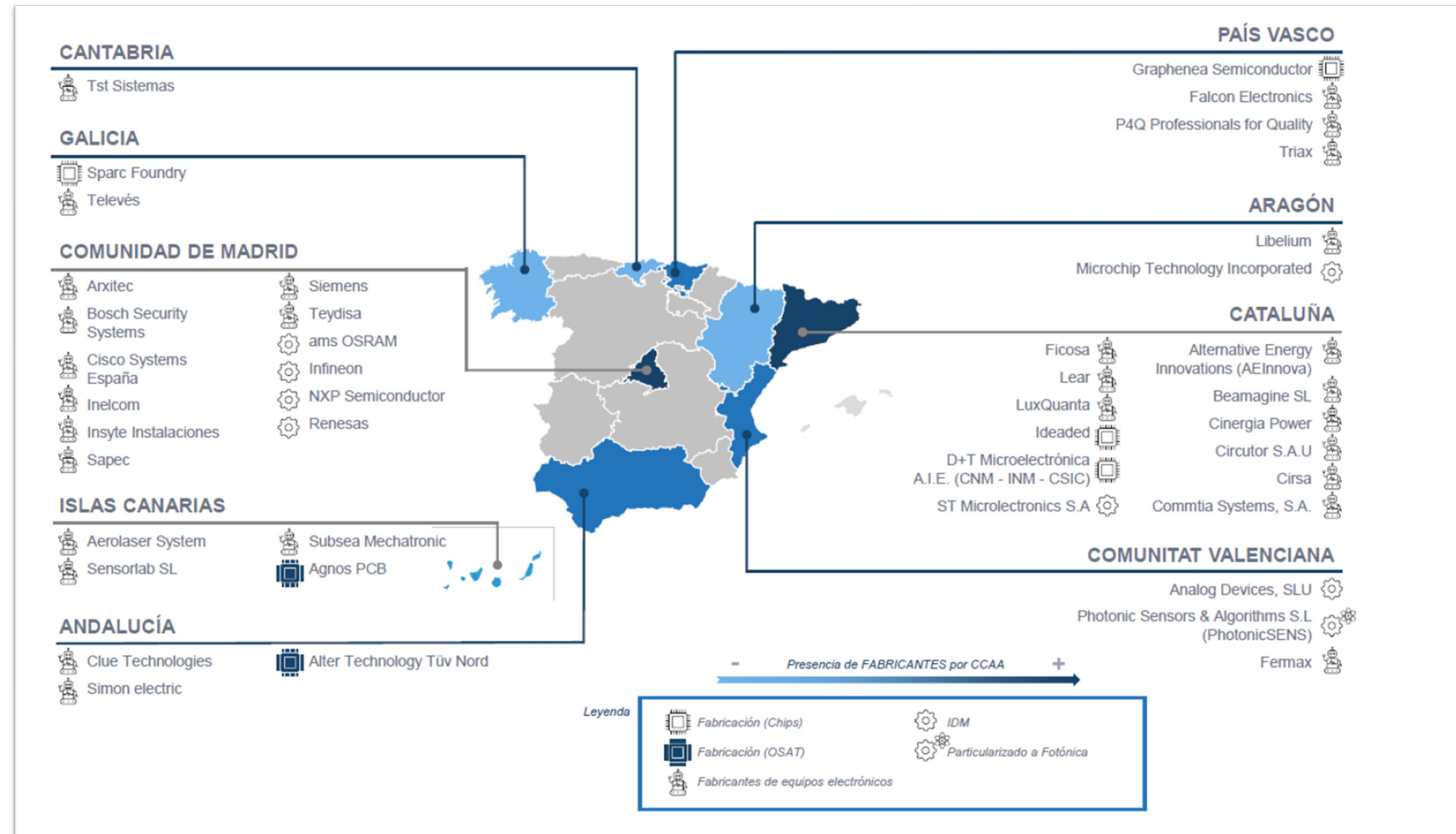
Spanish semiconductor ecosystem

IP and Design Companies



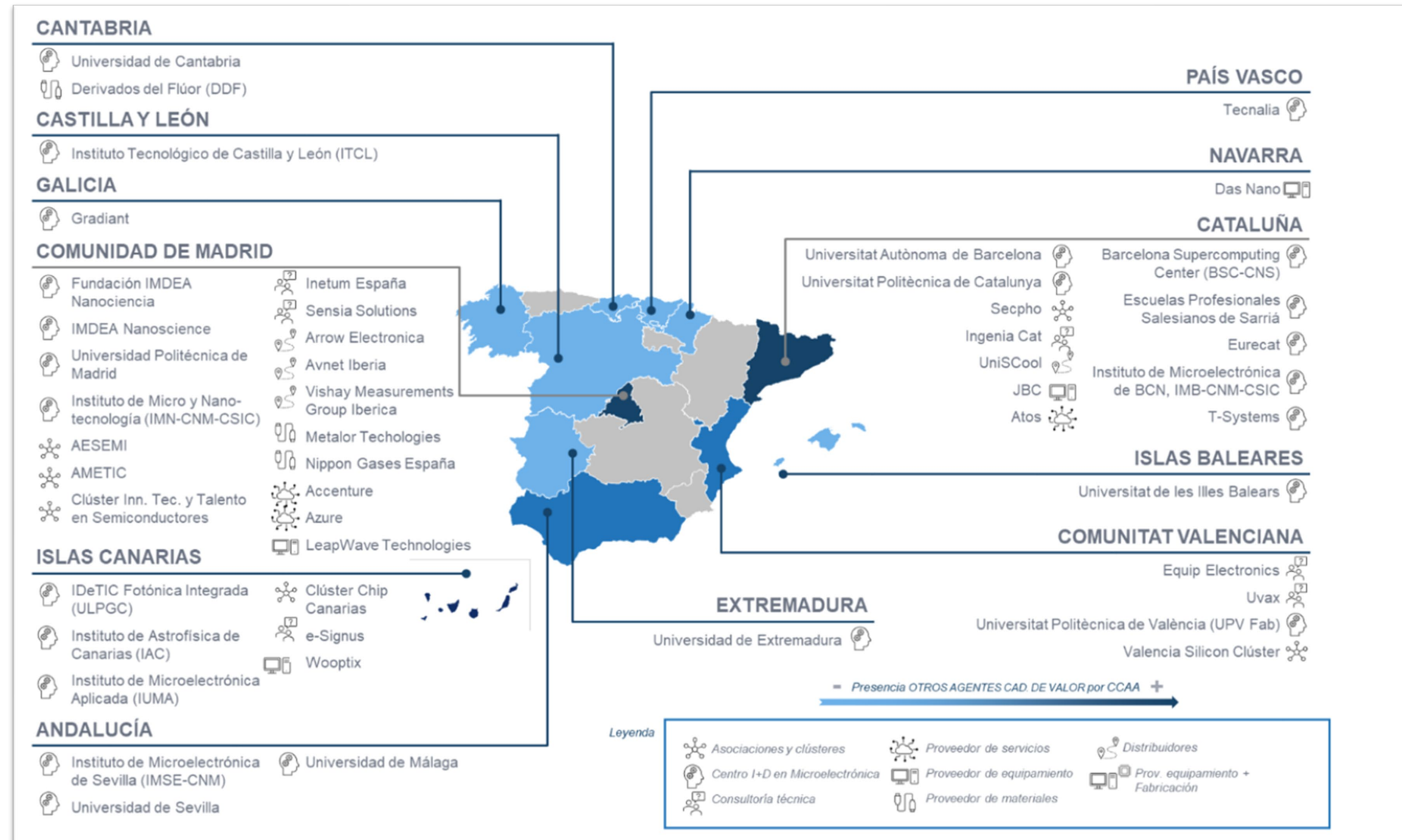
Spanish semiconductor ecosystem

Fabrication and OSAT

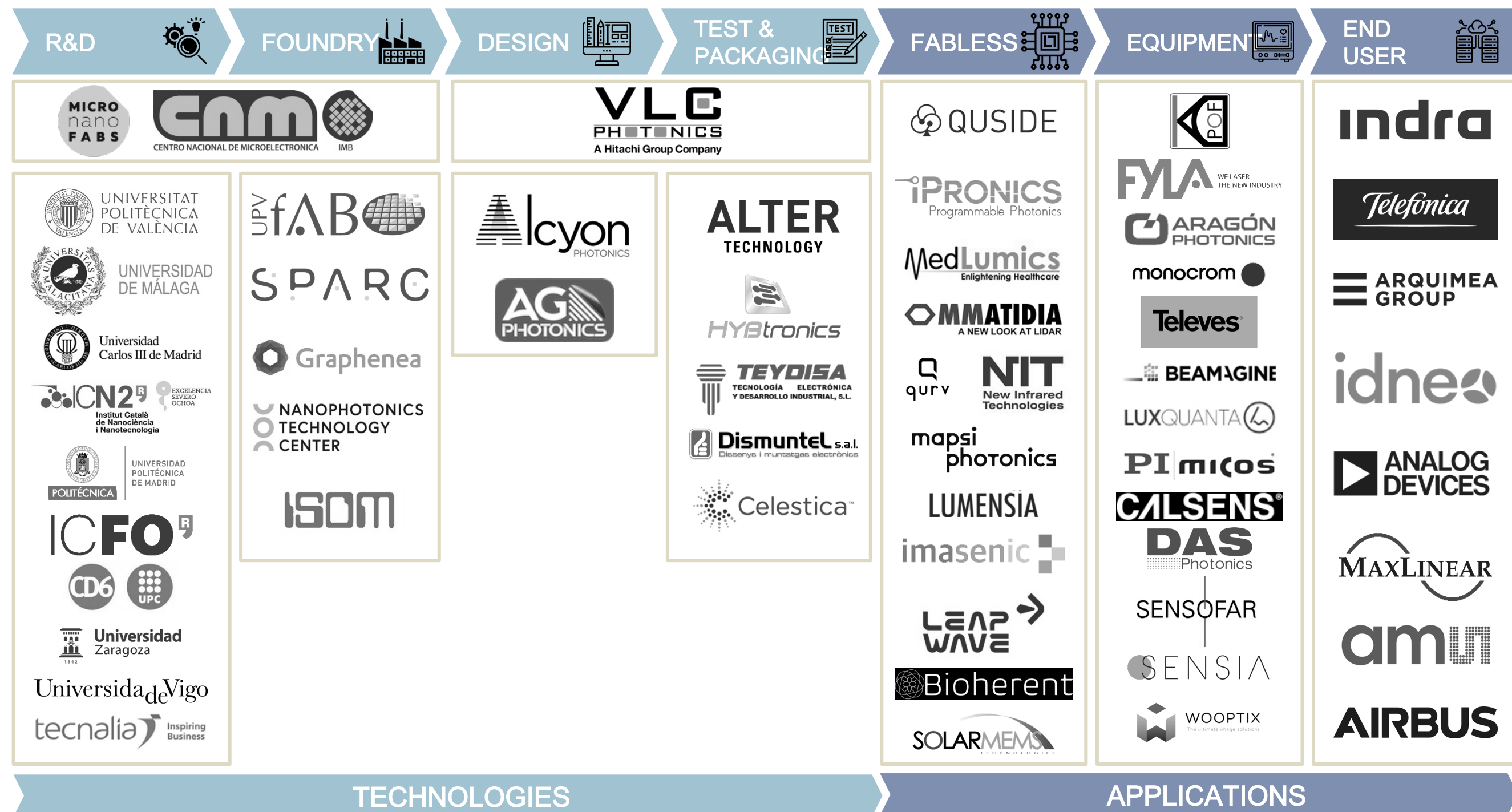


Spanish semiconductor ecosystem

RTOs, Equipment,
Clusters, Materials



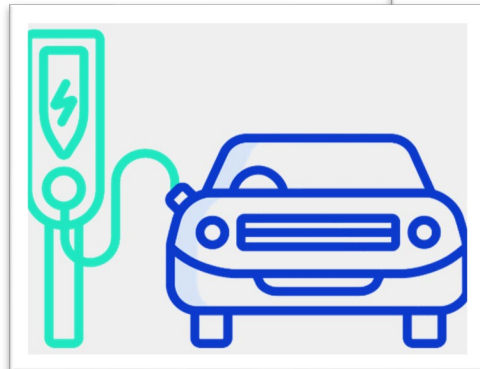
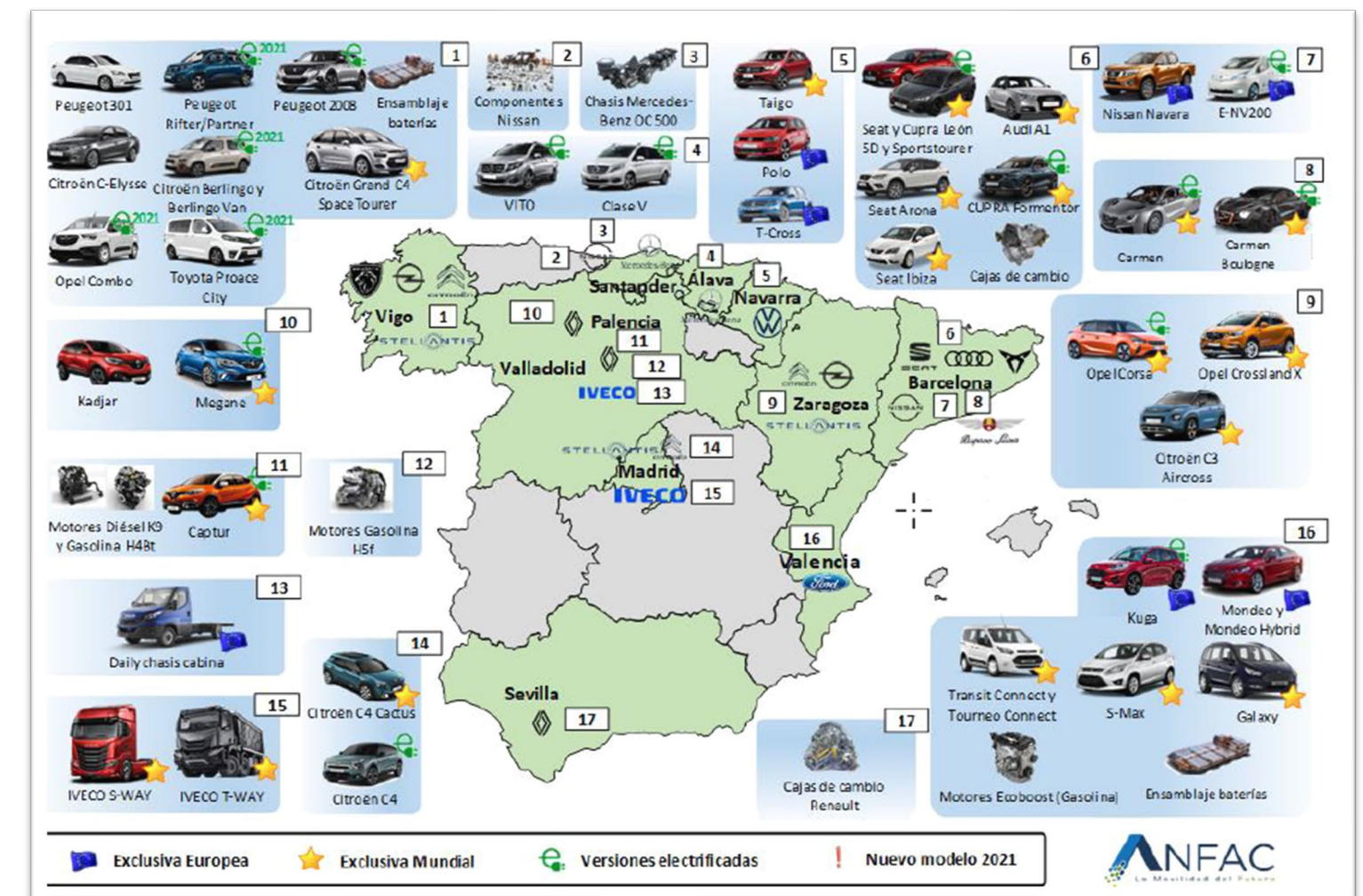
Integrated photonics value chain



Value chain & customer base: automotive

- #2 largest manufacturer in the EU #1 position for industrial vehicles
- #9 position globally, 2,20 million vehicles (2022) on a constant growth
- Electric and Connected Vehicle rapid development:
 - 5 battery gigafactories announced
 - 13,2% of produced vehicles are already electric.

»»» Production Centres of the automotive industry

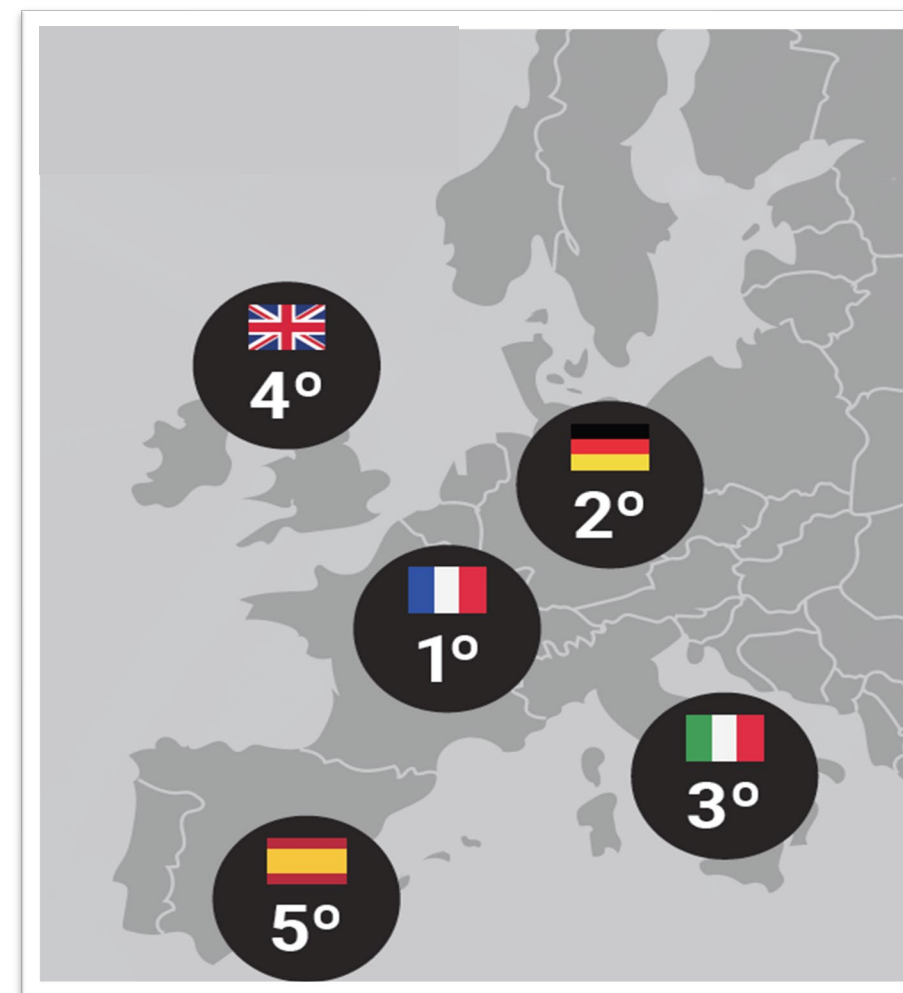


Value chain & customer base: aerospace

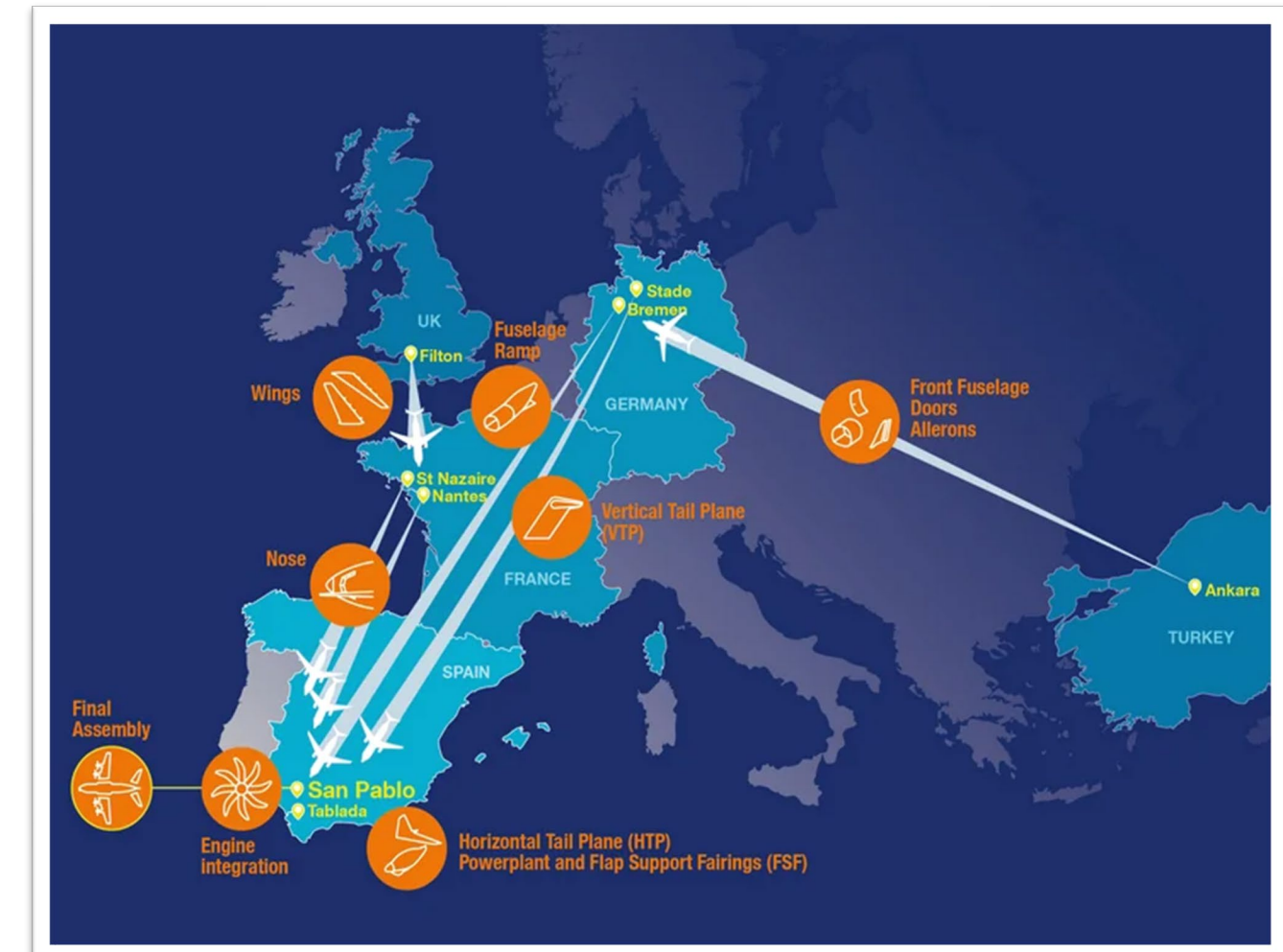
The aerospace industry: consumer, partner, synergies

- Half of the world commercial aircrafts uses Spanish technology
- **Turnover.** #5 in EU and #8 in the world by turnover (14 B€ 2019, 12,14B€ in 20233)
- **Employment** #4 in EU. 53,541 highly qualified employees,
- **724 Production centres:** Spanish companies certified in aeronautics

Employees European ranking



Airbus A400 production map



Source: Airbus

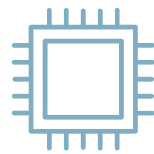
What is SETT?

**SPANISH GOVERNMENT'S
INVESTMENT ARM
FOR ADVANCED TECHNOLOGIES**



16 B€ mobilized for digital technolog

PERTE CHIP



Enhances **semiconductors sector**,
from R&D, through design to
manufacturing

- **Direct coinvestment** in companies
- **Blended financial instruments** (EU Chips Act First-of-a-kind)



10.000 M€

NEXT TECH



Investment in **deep tech** start ups and
scale ups, **attracting international funds**
and strengthening the **venture capital**
sector

- **Direct coinvestment** in
companies
- **Indirect investment** through
Investment Funds



4.000 M€

SPAIN AUDIOVISUAL HUB



To increase the **attractiveness** of Spain
as a **world investment platform** and
global business environment in the
audiovisual sector

- **Direct coinvestment** in audiovisual
technologies
- **Indirect investment** through
Investment Funds
- **Soft loans** (State aid)



1.712 M€

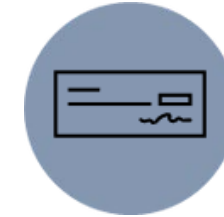
How we work



Direct co-investments to
boost private investors



One-stop shop for submitting
investment proposals



Flexible investment
tickets



Investing in Spanish tech
companies



Rapid decision-making
(commercial law)



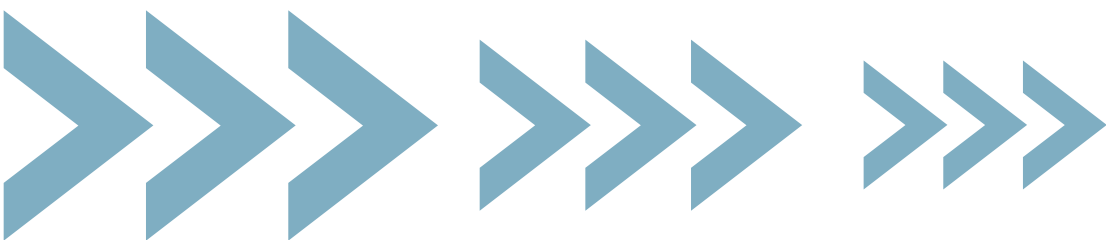
Minority and non-interfering
investment



Long-term flexible
grants and loans



Reduction of financial and tech risk
due to in-house due diligence
process by qualified experts



NEW OPPORTUNITIES TO COME: THE ROLE OF SETT



Trabajando en el presente
por la España del futuro

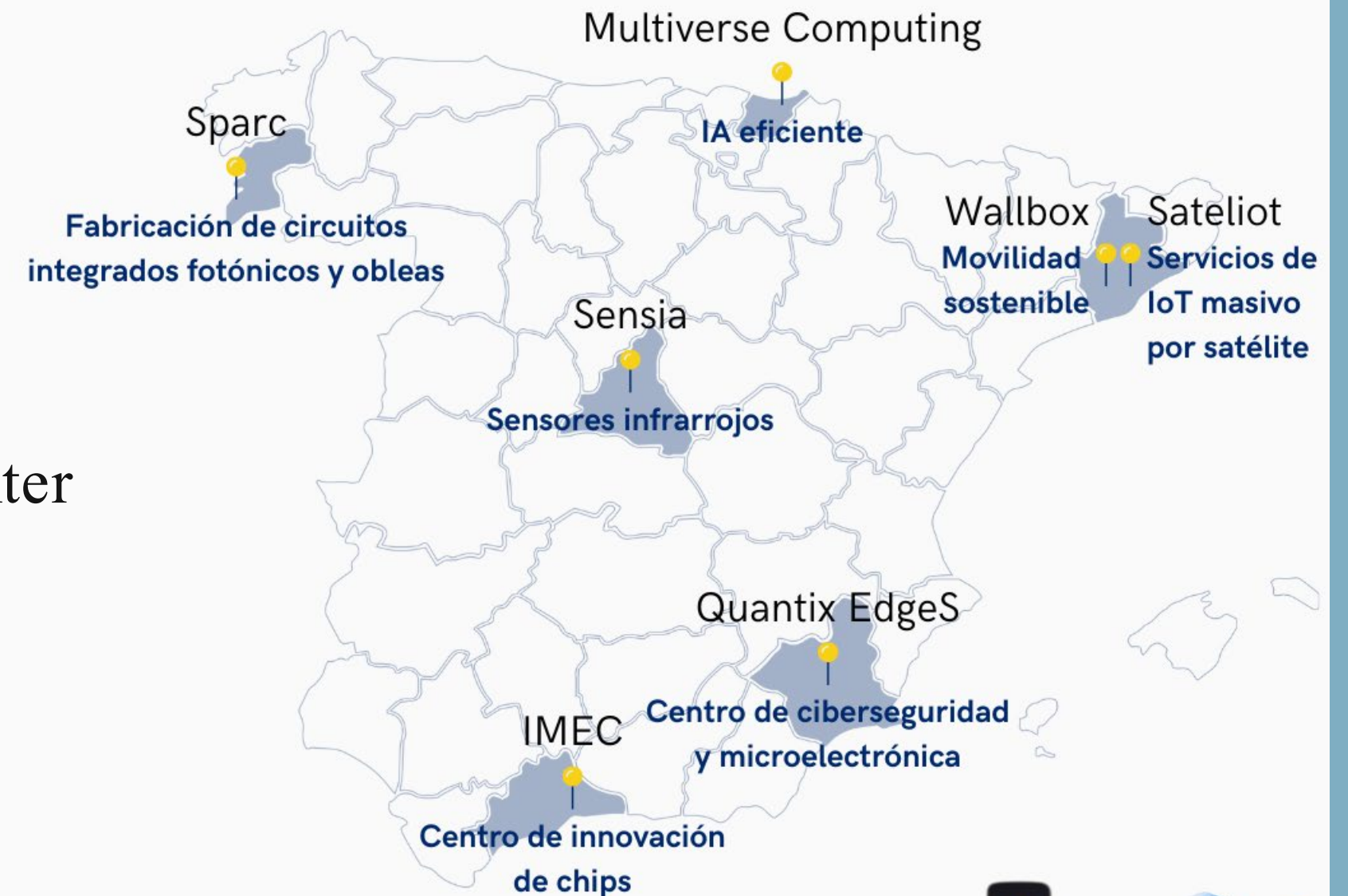
sett

More than 1 B€ mobilized for:

- Sparc – Photonic Fab
- Multiverse Computing – Efficient AI
- Sensia – Infrared sensors
- Wallbox – Sustainable mobility
- SatelloT – Massive IoT services via satellite
- Quantix EdgeS – Cybersecurity and microelectronics center
- IMEC – Chip innovation center
- Woptix – Semiconductor metrology equipment

Qualified dealflow opportunities in our pipeline:

- New materials fab
- New substrates
- Quantum and AI
- Packaging
- RISC-V



Spain: investment destination



GDP

Above EU

Spain growth: 3%
EU average: 0,8%



Employment

Record numbers

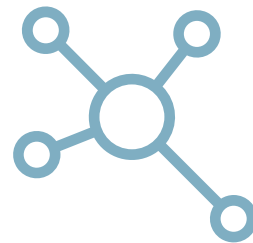
Generating #1 of 3 jobs
created in EU



Talent

Research and tech

#4 UE scientists and engineers
#3 EU women in IT



Connectivity

High capacity network

#2 EU en fiber (91% vs 56%)
#3 EU conectivity (fixed + 5G)



Infrastructures

Transport

#2 worldwide high speed train
network
#7 worldwide best transport network
#3 in Europe cargo tonnage
management.



Energy

Affordable and clean

60% from renewable sources
Average price 2024 H1: 37.63€/MWh
Spain #1 largest LNG infrastructure in EU
(37% if total EU's capacity)

Spain: investment destination

Key player in the world economy

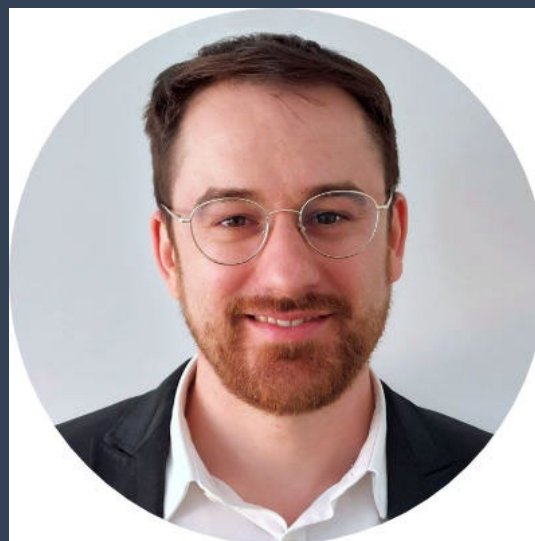


- World's 15th largest economy and the 4th largest economy in the EU.
- Total population of 49 million. More than 6.5 million foreigners. About 600 million people speaking Spanish in the world.

- **Privileged geo-political location** : Economic and cultural bridge between Europe, Middle East, Africa and South America.
- **5 Spanish cities between the 20 best places to live** in the world 2023 according to InterNations in its annual Expat City Ranking (1º Málaga, 2ª Alicante, 3º Valencia, 6º Madrid, 13º Barcelona).



Thank you



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