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Semiconductor Fact Sheets

4. Title of material, if any	5. Name of foreign principal on whose behalf this material was transmitted. Electronic Industries Association of Japan (EIAJ)
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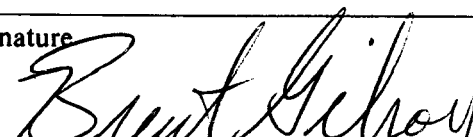
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Date of report 5/26/95	Name and title Brent Gilroy, Vice President	Signature 
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ELECTRONIC INDUSTRIES ASSOCIATION OF JAPAN

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May 25, 1995

FACTS ABOUT U.S.-JAPAN SEMICONDUCTOR TRADE ISSUES FOUR AND FIVE

What would it be like if an entire industry in one country banded together to help foreign competition in their own market? Japanese semiconductor users have done just that for over five years.

Enclosed are the fourth and fifth of five information packets on U.S.-Japan semiconductor trade.

The fourth packet discusses design-ins in the Japanese semiconductor market, which have increased more than seven-fold in the past decade. Design-ins — a process in which a semiconductor manufacturer is intimately involved with the end-product manufacturer in the design of a chip that will go into the end-product — have long been considered vital to the success of foreign chipmakers in penetrating the Japanese semiconductor market.

On a related topic, the fifth packet focuses on efforts made by Japanese user companies to increase market access opportunities for foreign semiconductor suppliers.

If you have any questions about this material or are interested in additional information on this subject, please feel free to contact me at (202) 778-8255.

Stanton D. Anderson

Counsel to the Electronic Industries Association of Japan

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SEMICONDUCTOR
FACTS 1995



ISSUE FOUR:

Focus on Design-Ins



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ISSUE FOUR: *Focus on Design-Ins*

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INCREASE IN DESIGN-IN ACTIVITY

The number of design-ins increased seven-fold between 1986 and 1993.

Yearly Trend in the Number of Design-Ins

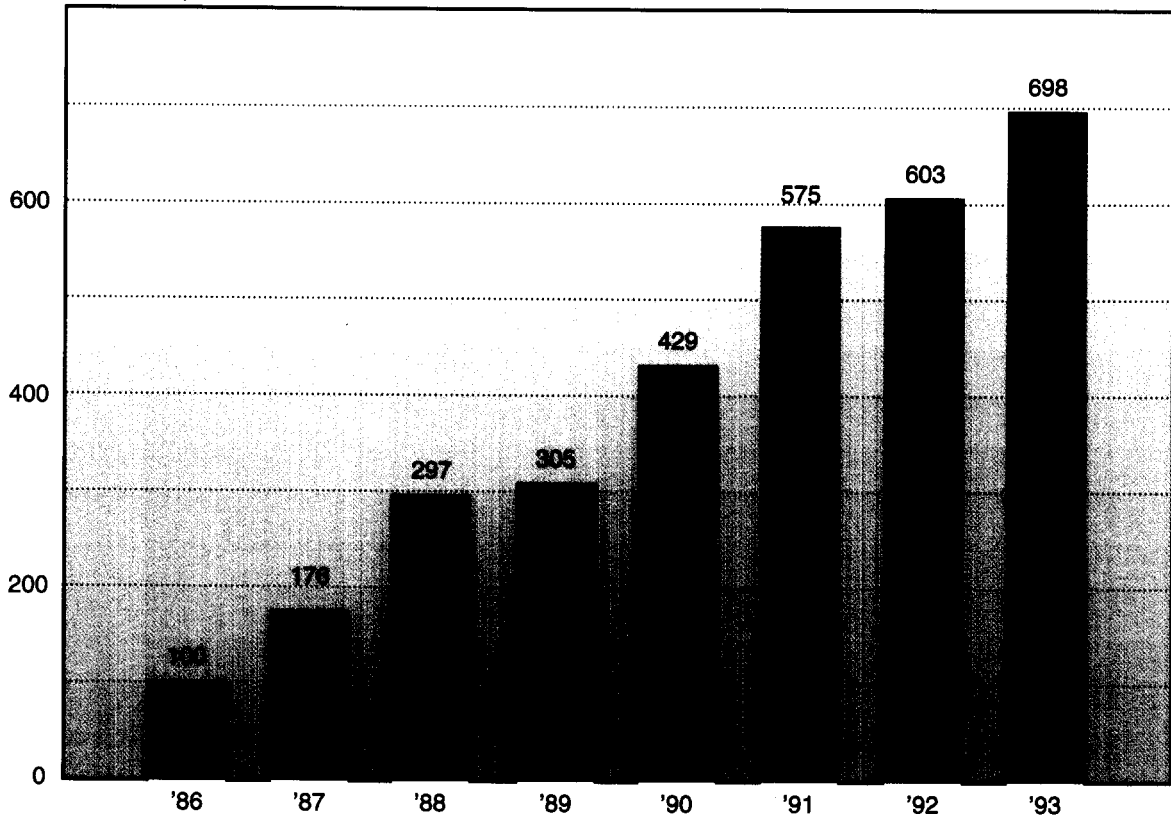
The number of design-ins has increased steadily every year for the last seven years. In order to further promote foreign

market access and establish user-supplier relationships, additional effort should be directed at promoting design-ins.

In 1993, the number of design-ins increased 16 percent over the prior year. During the seven-year period from 1986 to 1993, the number of design-ins increased seven times or at an annual rate of 32 percent.

TREND IN THE NUMBER OF DESIGN-INS

(Index: 1986 = 100)



SOURCE: UCOM

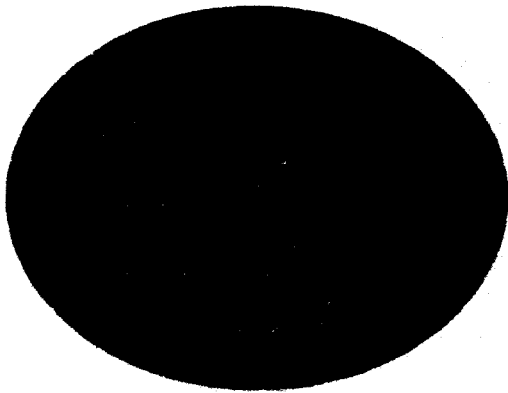
CHIP-IN CAMPAIGN

UCOM conducted the first design-in campaign, known as "Chip-In," from May 24th to July 15th, 1994 in order to seek out foreign semiconductor suppliers and work with them to identify the best opportunities for business growth in Japan. Numerous opportunities were made available

to foreign suppliers, including design-in seminars by individual users, UCOM seminars for design-ins in automotive, telecommunications and game sectors, etc. Total participants of the campaign reached over 7,000. A similar campaign is scheduled for 1995. Details are as follows.

LOGOS OF CHIP-IN CAMPAIGN 1994 AND 1995

1994



1995



1994 CAMPAIGN SCHEDULE AND PARTICIPANTS

Date	Event	Number of Participants
May 24	Kick off party	251
May 27	DAFS Design-In Seminar	40
June 17	UCOM/CA Seminar (Tokyo)	152
June 20	UCOM/CA Seminar (Osaka)	115
June 21	INSEC Design-In Award	100
June 28	INSEC Seminar & Exhibition	331
July 12	DOC Trade Mission •Seminar •Reception •Business Meeting	130 123 51 companies
July 15	UCOM Design-In Campaign •Closing Ceremony •Seminar	194 305
through the period	Design-In Seminars (by individual cos.)	5162

JOINT PRESS RELEASE BY EIAJ/SIA, ON SECOND DESIGN-IN CAMPAIGN

UCOM and SIA to Hold Second Design-In Campaign (CHIP-IN II)

TOKYO, APRIL 19, 1995 ... The Users' Committee of Foreign Semiconductors (UCOM) of the Electronic Industries Association of Japan (EIAJ) and the U.S. Semiconductor Industry Association (SIA) announced today that they will sponsor a design-in campaign (Chip-In II) from May 10 to June 29, 1995, with the goal of further stimulating semiconductor design-in activities. During the campaign period, a series of seminars and exhibitions will be held in Tokyo and Osaka.

Design-in activities, in which semiconductor users and suppliers work together to develop specific large-scale integrated circuits (LSIs), have increased remarkably in recent years. These efforts by both sides have rapidly expanded the number of design-ins and have deepened cooperative relationships between Japanese users and foreign suppliers.

The first design-in campaign, solely sponsored by UCOM from May to July 1994, was well received by U.S. suppliers as a

method for strengthening business links between Japanese users and foreign suppliers. For this reason, UCOM and SIA decided to implement a cooperative campaign this year. An existing joint committee, "Cooperative Project to Promote Design-In" has organized the 1995 campaign.

In last year's campaign, UCOM and related associations in Japan sponsored seven seminars, and Japanese user companies held a total of 62 individual seminars and 14 exhibitions. In this year's campaign, in addition to the efforts of users, U.S. suppliers will take an active role. SIA will sponsor two full-day seminars on semiconductors, for personal computers and automotive equipment, and U.S. supplier companies have individually scheduled seven seminars.

As in 1994, the U.S. Department of Commerce will send a trade mission to Japan. One-on-one business meetings with Japanese users will be held in June in line with this year's campaign.

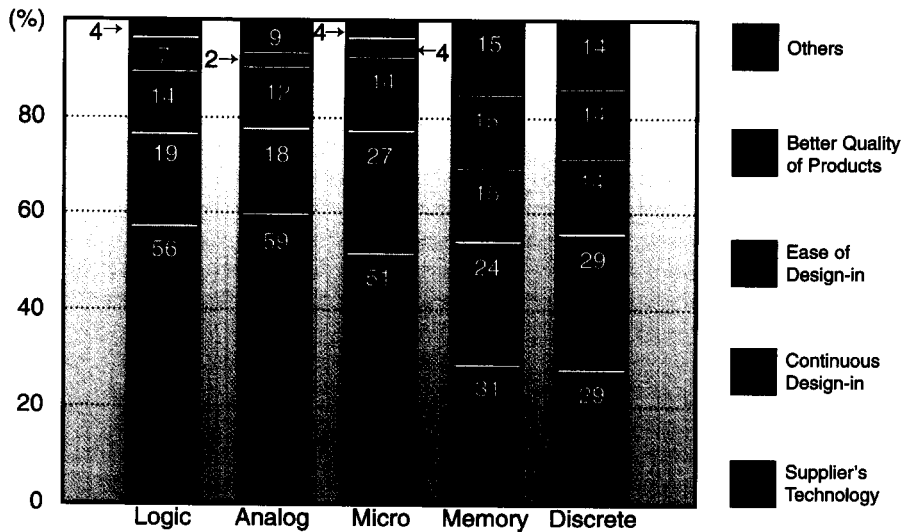
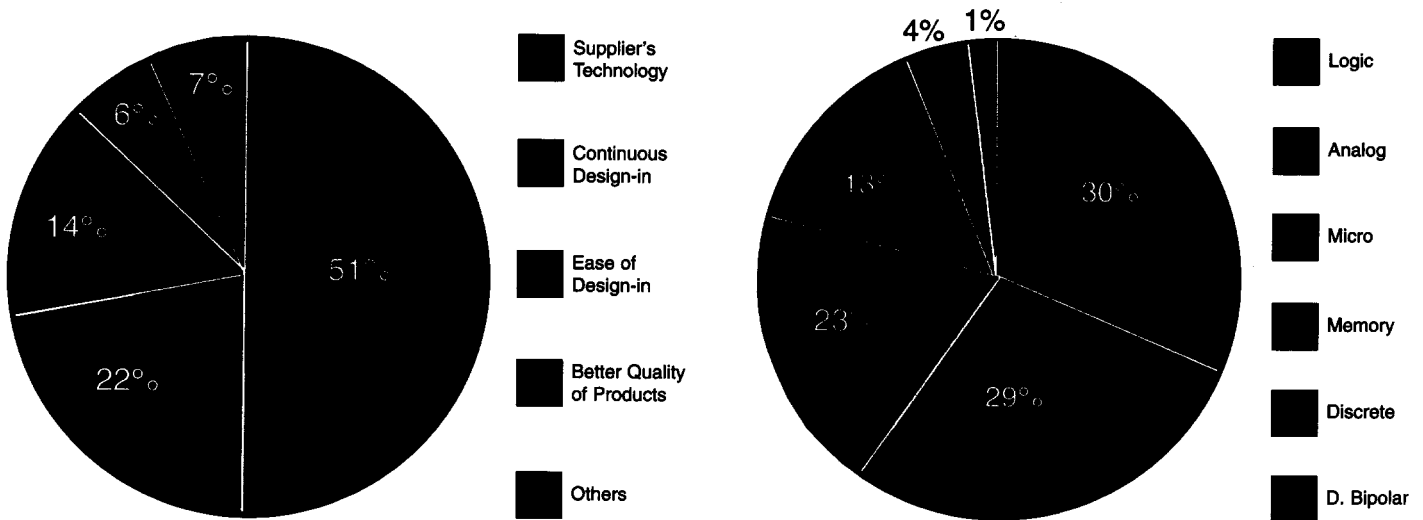
KEY FACTORS FOR SUCCESSFUL DESIGN-INS

Industrial surveys show that more than half of the Japanese users point to suppliers' technological capabilities as the most important factor for a successful design-in. Other important considerations among Japanese buyers include continuous design-in efforts and the ease of design-ins. These surveys can be interpreted to mean that the keys to a successful design-in are superior technology and accumulated experience. Three-fourths of the Japanese buyers expect foreign suppliers to bring these keys to success to their design-in activity.

User expectations, however, vary by product. For example, more than half of the users point to technology as the key to a successful design-in for analog, logic, and micro devices, whereas technology is regarded as less important for other products that are easier to design in.

Good relationships with Japanese buyers, therefore, will be facilitated where foreign suppliers can offer continuous design-in support with superior technology.

The following are the result of surveys of UCOM's 63 member companies regarding successful design-ins in 1994. The analysis was made by reference to 164 successful cases from responses of 31 member companies.



SOURCE: UCOM

EXAMPLES OF UNSUCCESSFUL DESIGN-INS

Although there were many successful design-ins in 1994, there were also some that were not successful.

Product	Application	Cause of Unsuccessful Design-in
FC	Automobile	Unable to meet user's development schedule.
SC	Consumer Product	Development started, but became unable to develop.
GA	Comm. Equip.	Quality problem took place due to IC design.
FPGA	Comm. Equip.	Unable to meet user's design specification.
ASIC	Industrial Equip.	Price was more than 20% higher than Japanese competitors.
GA	Information Equip.	Unable to meet user's design specification.
GA	Comm. Equip.	Unable to meet user's requiring price.
ASSP	Information Equip.	Unable to meet user's quality level.
ASSP	Consumer Product	Poor quality level of assembly.
GA	Comm. Equip.	Unable to meet user's specification.
FC	Consumer Product	Unable to meet user's requiring price.
GA	Industrial Equip.	Unable to meet user's requiring price.
ASIC	Consumer Products	Unable to meet user's development schedule.

SEMICONDUCTOR
FACTS 1995



ISSUE FIVE:

*Japan's Efforts to
Increase Market Access*



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ISSUE FIVE:

Japan's Efforts To Increase Market Access

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EFFORTS MADE BY JAPANESE USERS

The 62 major Japanese semiconductor users organized the Users' Committee of Foreign Semiconductors (UCOM) in 1988 in order to expand opportunities for foreign semiconductor suppliers to gain access to the Japanese market.

UCOM has sent trade missions overseas to contact foreign suppliers and held a large number of events including various seminars. It is also providing U.S. semiconductor suppliers with market access opportunities in Japan as much as possible, including the founding in May of 1992 of UCOM California, which is a liaison organization between Japanese users and small to medium-sized U.S. suppliers who cannot establish local operations in Japan.

Meanwhile, at the individual user level, MAPs (Market Access Plans) have been prepared and independent trade missions were dispatched exclusively for the purpose of promoting the purchase of foreign semiconductors. This past summer, Japanese users held in-house exhibitions.

As shown above, Japanese users are trying to provide maximum market access opportunities for foreign semiconductor suppliers.

UCOM Activities

Major events to date (Attachment 1)

UCOM has had 12 trade (business negotiation) missions to date with participation by a cumulative total of 343 foreign suppliers. UCOM also has held numerous seminars in the HDTV, communications, automobile, and design-in fields.

Overview of the two trade missions held in 1994 (Attachment 2)

Forty-two foreign suppliers (172 people) participated in three successful trade missions held in Ikebukuro, Tokyo

during July 12-14, 1994, in Paris during December 7-9, 1994, and in Santa Clara during March 13-15, 1995.

Overview of UCOM California (Attachment 3)

In June 1992, UCOM established the UCOM California liaison office in order to expand access to the Japanese market for small and medium-sized foreign suppliers. UCOM California introduces small and medium-sized foreign suppliers to Japanese users and provides them with information on the Japanese market.

EIAJ/UCOM-SIA Joint Steering Committee (Attachment 4)

In June 1991, EIAJ and SIA established a joint steering committee in order to: "conduct preliminary and follow-up investigations concerning EIAJ-SIA joint activities in order to increase foreign semiconductor manufacturers' access to the Japanese market, maintain constructive and friendly cooperative relationships between U.S. and Japanese semiconductor manufacturers, and promote further development."

Activities of Individual Companies

MAP preparation

Ninety-one Japanese users have prepared Market Access Plans (MAPs) in which they describe their contact persons, internal semiconductor buying procedures, trends in demand, etc.

Special events by individual companies

Between April and December 1992, 180 special events have been held by individual companies, including negotiations and exhibitions. Of these, 123 have been sponsored by users.

UCOM MAJOR EVENTS						
	Date	Events	Place	Participants (Companies)		Remarks
				User	Supplier	
1	12/13/88	Purchasing Promotion Seminar (consumer & automotive)	Tokyo	121 (54)	63 (27)	204 People
2	3/35/89	California Seminar (consumer & automotive)	Santa Clara	40	90	
3	7/13-14/89	The First Automotive Semiconductor Technical Seminar (Cosponsored by JAPIA & INSEC)	Tokyo	89 (18)	66 (14)	
		Trade Mission (one-on-one meetings)	Tokyo	60 (18)	42 (14)	62 meetings
4	10/20/89	Promotion of Design-in (consumer)	Kyoto	122 (38)	39 (13)	
5	12/6-15/89	Trade Mission (cosponsored by JAPIA)	Santa Clara	total: 100 UCOM (14) JAPIA (16)	206 (51)	407 meetings
6	4/5-6/90	The First HDTV Semiconductor Technical Symposium	San Francisco	38 (10)	85 (40)	
7	7/12-13/90	The Second HDTV Semiconductor Technical Symposium	Tokyo	122 (51)	49 (17)	
8	10/23/90	The First TSCP (telecommunications) Seminar	Santa Clara	72 (16)	155 (37)	
	10/24-25/90	Trade Mission (one-on-one meetings)	Santa Clara	(15)	(35)	160 meetings
9	12/5/90	The Second TSCP (telecommunications) Seminar	Tokyo	84 (22)	52 (19)	
10	12/11-12/90	The Second Automotive Semiconductor Technical Seminar (cosponsored by JAPIA)	Phoenix	13 (6)	50 (10)	
		Trade Mission (one-on-one meetings)	Phoenix	10 (5)		
11	4/16/91	The Third TSCP (telecommunications) Round Table	Tokyo	80 (32)	40 (10)	
12	4/25/91	The Third Automotive Semiconductor Technical Seminar (cosponsored by JAPIA)	Tokyo	52 (23)	47 (10)	
13	10/15/91	The Fourth TSCP (telecommunications) Seminar	Tokyo	84 (29)	61 (16)	
14	11/6-8/91	Trade Mission	Santa Clara	84 (24)	306 (55)	201 meetings
15	3/18/92	Design-in Seminar	Tokyo	170 (52)	124 (25)	
16	4/1/92	The Fifth TSCP (telecommunications) Seminar	Tokyo	80 (28)	51 (13)	
17	7/15/92	Foreign Semiconductor Trade Mission	Tokyo	328 (56)	403 (48)	483 meetings
18	12/3/92	The First UCOM California Seminar	Santa Clara	—	42 (31)	
19	12/7-10/92	Trade Mission to Europe	Paris	62 (18)	106 (23)	211 meetings
20	4/19-21/93	The First DOC Trade Mission	Tokyo	177 (27)	140 (16)	153 meetings

UCOM MAJOR EVENTS						
	Date	Event	Place	Participants (Companies)		Remarks
				User	Supplier	
21	5/14/93	The Second UCOM California Seminar	Tokyo		40 (27)	77 people
22	10/20/93	UCOM California Commemorative Event	Santa Clara		43 (27)	187 people
23	10/21/93	Mini Mission (sponsored by DOC/UCOM California)	Santa Clara	19 (10)	25 (5)	25 meetings
24	12/7-10/93	Foreign Semiconductor Trade Mission	Tokyo	311 (60)	306 (52)	447 meetings
25	3/10/94	The Fourth UCOM CA Seminar	Santa Clara	—	29 (21)	72 people
26	4/26-28/94	Trade Mission to Taiwan	Taipei	59 (19)	45 (16)	140 meeting
27	5/24-7/15/94	The First Design-in Campaign (Chip-in Campaign): Very successful events were held with cooperation of SIA, EECA, INSEC, DAFS, and JAPIA to promote design-ins for foreign semiconductors.				
28	6/17/94	UCOM CA Up-to-date Technology Seminar	Tokyo	152	—	
29	6/20/94	UCOM CA Up-to-date Technology Seminar	Osaka	115	—	
30	7/12-14/94	The Second DOC Trade Mission	Tokyo	173 (36)	79 (15)	151 meetings
31	7/15/94	UCOM Design-in Seminar	Tokyo	—	281 (75)	306 people
32	9/27/94	The Fifth UCOM CA Seminar	Santa Clara	—	28 (23)	Reception 103 people
33	12/7-9/94	Trade Mission to Europe	Paris	38 (13)	49 (13)	108 meetings
1995 UCOM MAJOR EVENTS PLANNED						
34	3/13-15/95	Trade Mission to USA	Santa Clara			
35	4/5-7/95	The Sixth TSCP Seminar & Business Meetings	Tokyo			
36	4/24-26/95	Trade Mission to Taiwan	Taipei			
37	5/10-6/29/95	The Second Design-in Campaign (Chip-in Campaign II)				
38	6/27-28/95	The Third DOC Trade Mission	Tokyo			
39	6/29/95	UCOM Design-in Seminar	Tokyo			
40	Autumn 95	Trade Mission from Europe (tentative)	Tokyo			

FOREIGN SEMICONDUCTOR TRADE MISSION

1. **Date:** July 12-14, 1994

2. **Location:** U.S. Trade Center, Ikebukuro, Tokyo

3. **Participants:**

One-on-one business meetings

- 15 U.S. suppliers
- 79 attendees
- 36 users, 193 attendees

Seminar

- 103 attendees (from MITI, DOC, U.S. Embassy, INSEC, DAFS, foreign suppliers, and UCOM member users)

Reception

- 132 attendees (from MITI, DOC, U.S. Embassy, INSEC, DAFS, foreign suppliers, and UCOM member users)

4. **Specific activities:**

Sponsored by DOC and U.S. Embassy in cooperation with SIA, INSEC, DAFS, and UCOM under the auspices of MITI

Schedule

- July 12 (Tues.) 14:00-17:00 Seminar
- July 12 (Tues.) 18:30-20:30 Reception (Prince Hotel, Sunshine City)
- July 13 (Wed.) 9:00-17:15 One-on-one business meetings
- July 14 (Thur.) 9:00-17:15 One-on-one business meetings
(each meeting: 75 minutes; maximum of 10 meetings)

One-on-one business meetings:

Fifteen booths were set up in the U.S. Trade Center using partitions. Each supplier was assigned a booth which was visited by users who wanted to discuss business opportunities.

A total of 151 one-on-one meetings were conducted. The participants generally were satisfied with these meetings. Small and medium-sized suppliers, in particular, were pleased to be given this favorable opportunity.

FOREIGN SEMICONDUCTOR TRADE MISSION

1. **Date:** December 7-9, 1994

2. **Location:** Palais des Congres, Paris, France

3. **Participants:**

One-on-one business meetings

- 13 European suppliers
- 49 attendees
- 13 users, 38 attendees

Symposium

- 103 attendees (from EC Commission, JETRO, EECA, INSEC, DAFS, foreign suppliers, and UCOM member users)

Reception

- 86 attendees (from MITI, EC Commission, JETRO, EECA, INSEC, DAFS, foreign suppliers, and UCOM member users)

4. **Specific activities:**

Cosponsored by EECA and UCOM in cooperation with INSEC, DAFS, and JETRO under the auspices of MITI and EC Commission

Schedule:

- December 7 (Wed.) 14:00-18:30 Symposium (Sponsored by INSEC)
- December 7 (Wed.) 18:30 -20:30 Reception (Cosponsored by INSEC and UCOM)
- December 8 (Thur.) 9:00-18:30 One-on-one business meetings
- December 9 (Fri.) 9:00-18:30 One-on-one business meetings
(each meeting: 1.5 hours; max. of 10 meetings)

One-on-one meetings:

Thirteen booths were set up in meeting rooms of Palais des Congres. Each user was assigned a booth which was then visited by suppliers who wanted to discuss business opportunities.

A total of 108 one-on-one meetings were conducted. The participants generally were satisfied with these meetings.

FOREIGN SEMICONDUCTOR TRADE MISSION

1. **Date:** March 13-15, 1995

2. **Location:** Santa Clara Convention Center, California, USA

3. **Participants:**

One-on-one business meetings

- 14 U.S. suppliers
- 44 attendees
- 14 users, 33 attendees

Seminar

- 126 attendees (from DAFS, US suppliers, and UCOM member users)

Reception

- 149 attendees (from MITI, JETRO, DAFS, US suppliers and UCOM member users)

4. **Specific activities:**

Cosponsored by EIAJ/UCOM and SIA in cooperation with DAFS and under the auspices of MITI

Schedule

- March 13 (Mon) 13:30 - 17:15 Seminar
- March 13 (Mon.) 17:30 - 19:30 Reception
- March 14 (Tues.) 9:00 - 18:30 One-on-one business meetings
- March 15 (Wed.) 9:00 - 18:30 One-on-one business meetings
(each meeting: 1.5 hours; max. of 10 meetings)

One-on-one business meetings:

Fourteen booths were set up in the convention center. Each user was assigned a booth which was then visited by suppliers who wanted to discuss business opportunities.

A total of 109 one-on-one meetings were conducted. The participants generally were satisfied with these meetings. Small and medium-sized suppliers, in particular, were pleased to be given this favorable opportunity.

OVERVIEW OF UCOM CALIFORNIA

Purpose: UCOM California, which is the EIAJ/UCOM liaison office on the U.S. West Coast, is designed as a semiconductor market access promotion center which provides much needed assistance for small and medium-sized U.S. semiconductor suppliers who hope to gain access to the small Japanese users, at the same time expanding foreign access to the Japanese market and helping these U.S. suppliers strengthen cooperative relationships with Japanese users.

UCOM California will directly disseminate information on the Japanese market to those small and medium-sized U.S. semiconductor suppliers who do not have direct contacts with Japanese suppliers as well as serve as an information clearinghouse between U.S. suppliers and Japanese users/suppliers.

Official Name: UCOM California
Liaison Office of Semiconductor Users' Committee, Japan

Established: June 1, 1992

Location: 2350 Mission College Boulevard, Suite 705
Santa Clara, California 95054 USA
Tel: (408) 988-0291; Fax: (408) 988-0293

Members: Ryouhei Iketani (Director)
Stephen S. May (U.S. Semiconductor Trade Coordinator)
Lisa Ann Strand (Administrative Assistant)

Activities:

1. Assist in providing small and medium-sized U.S. semiconductor suppliers with greater market access opportunities in Japan; supply information about trends in the Japanese market to users and suppliers during individual company visits; user/supplier referral service.
2. Sponsor and support activities such as trade missions, seminars and symposia sponsored by EIAJ/UCOM.
3. Assist in promoting industry cooperation.
4. Hold independent study meetings.
5. Gather and disseminate general information.

UCOM CALIFORNIA MAJOR EVENTS					
Date	Event	Place	Participants (Companies)		Remarks
			User	Supplier	
9/17/92	Opening Ceremony	San Jose			316 people
12/3/92	The 1st UCOM CA Seminar	Santa Clara		42(31)	72 people
5/14/93	The 2nd UCOM CA Seminar	Santa Clara		40(27)	77 people
10/20/93	UCOM CA Commemorative Event (The 3rd UCOM CA Seminar)	Santa Clara		43(27)	187 people
10/21/93	Mini Mission (sponsored by DOC/UCOM CA)	Santa Clara	19(10)	25(5)	25 meetings
3/10/94	The 4th UCOM CA Seminar	Santa Clara		29(21)	72 people
6/17/94	UCOM CA up-to-date Technology Seminar	Tokyo	152		
6/20/94	UCOM CA up-to-date Technology Seminar	Osaka	115		
9/27/94	The 5th UCOM CA Seminar	Santa Clara		28(23)	Reception 103 people

EIAJ-SIA JOINT STEERING COMMITTEE & SUBCOMMITTEES

In June 1991, EIAJ and SIA established a Joint Steering Committee (STC) in order to "conduct preliminary and follow-up investigations concerning EIAJ-SIA joint activities in order to increase foreign suppliers' access to the Japanese market, maintain constructive and

friendly cooperative relationships between U.S. and Japanese semiconductor suppliers, and promote further development." Seven subcommittees were established which have been very active. The STC was intended to meet three times a year. Previous meetings have produced fruitful results such as the following:

Organization of the STC - Seven STC Subcommittees:

- Joint Public Relations Committee (JPR)
- Cooperative Project to Promote Design-Ins (CPD)
- Industry Cooperation Committee
- Telecom Semiconductor Cooperation Project (TSCP)
- HDTV Semiconductor Cooperation Committee (HDSCC)
- Joint Research Team (JRT)
- Automotive Semiconductor Cooperation Project (ASCP)

MEETINGS/ACTIVITIES OF THE STC

Date	Place	Discussion and Conclusion
1 August 1991	Santa Cruz, CA	Establishment of a Joint Research Project and Industrial Cooperation Project; basic agreement on the establishment of the Automotive Semiconductor Cooperation Project (ASCP)
2 November 1991	Tokyo	Report by each Subcommittee; agreement on the establishment of the ASCP
3 April 1992	San Francisco, CA	Report by each Subcommittee; discussion on agenda of EIAJ-SIA meeting
4 September 1992	San Jose, CA	Review of Subcommittee activities; review of June 4 EIAJ-SIA Joint Statement; termination of PPL Project
5 April 1993	San Francisco, CA	Review of Subcommittee activities. HDSCC: terminated in October 1993. ASCP: suspended its activities after publishing report. CPD: new proposal submitted and authorized.
6 March 1994	Waikoloa, HI	Review of Subcommittee activities. TSCP, CPD, ASCP: Activity reports in 1993 and plans in 1994. Industry Cooperation: New proposal to focus on upgrading the Japanese PC utilization submitted and authorized.
7 November 1994	Phoenix, AZ	Review of Subcommittee activities. CPD: Review of 1994 Chip-in Campaign, 1995 Second Chip-in Campaign "Chip-in II" proposed and authorized.