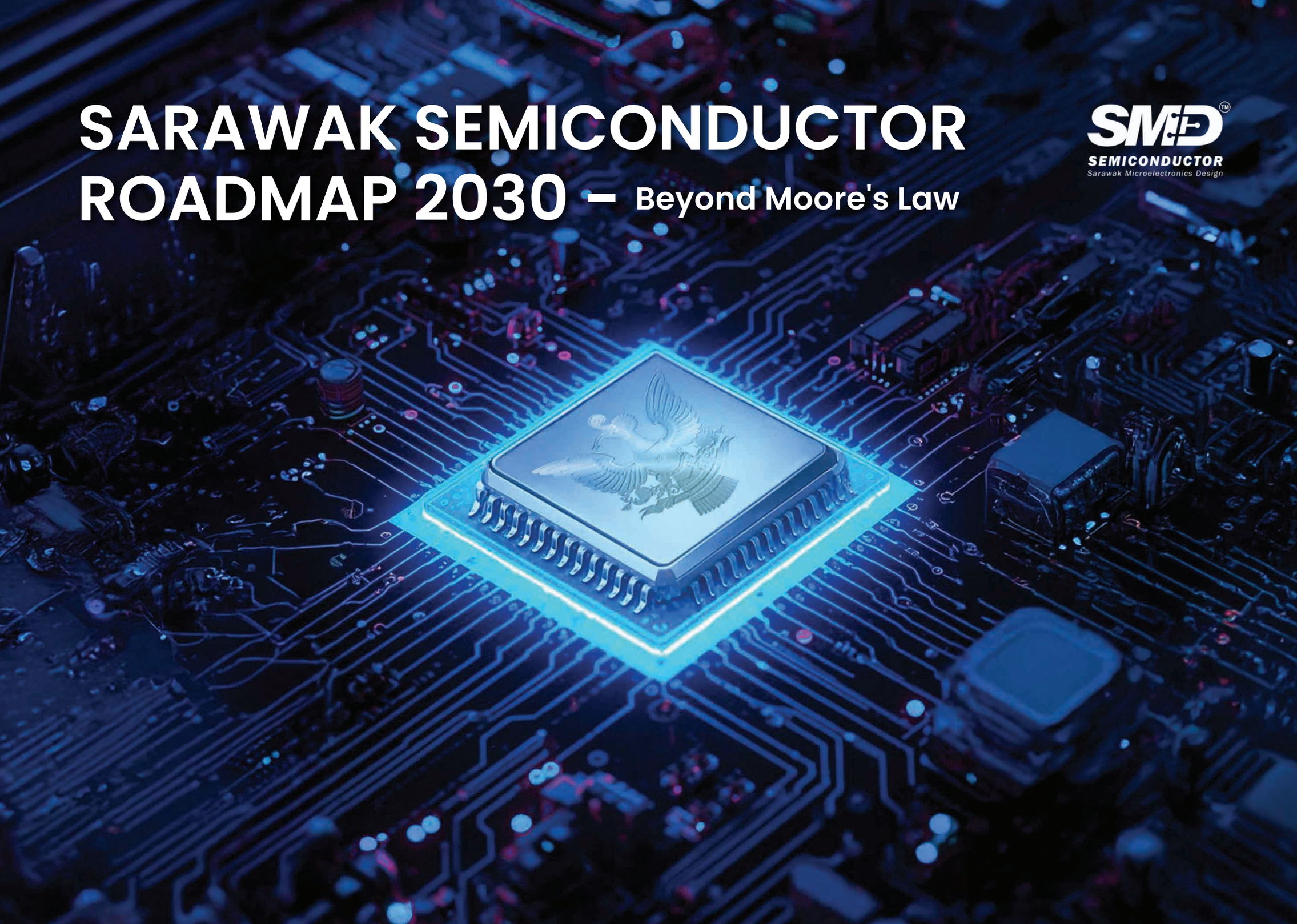
SARAWAK SEMICONDUCTOR ROADMAP 2030 – Beyond Moore's Law

SMD SEMICONDUCTOR
Sarawak Microelectronics Design



SEMICONDUCTOR

Sarawak Microelectronics Design

SARAWAK SEMICONDUCTOR ROADMAP 2030

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Sarawak is undergoing a deliberate and rapid transformation into a high-value, future-focused economy. The Sarawak Semiconductor Roadmap 2030 – Beyond Moore's Law sets out a clear and practical pathway, aligned with our Post-COVID Development Strategy 2030 (PCDS 2030) and broader State plans, to build a semiconductor ecosystem. This ecosystem will deliver high income jobs, downstream industries, and achieve technological sovereignty for Sarawak. This blueprint reflects what we have achieved in just a few years and what we will now scale up: targeted infrastructure, world-class partnerships, and a strong pipeline of homegrown talents and research.

By 2030, the roadmap will directly contribute to Sarawak's Post-COVID Development Strategy (PCDS 2030) by:

- Generating a RM30 billion contribution to GDP from the semiconductor industry, supporting Sarawak's overall target of RM282 billion.
- Creating 3,000 new high-skilled jobs, contributing to the 195,000 new jobs envisioned under PCDS 2030.
- Attracting RM2 billion in semiconductor-related investments, complementing the manufacturing sector's overall target of RM21.5 billion.

We will continue to invest, convene partners, and remove barriers so that Sarawak earns recognition as Asia's silicon nerve centre.

This roadmap is more than an economic strategy — it is a clarion call to our people, institutions and partners to imagine a Sarawak that competes globally while sustaining local prosperity. By combining technological ambition with inclusivity and sustainability, we ensure that growth uplifts every Sarawakian and secures a resilient future for generations to come.

Sincerely,

DATUK PATINGGI TAN SRI (DR) ABANG HAJI ABDUL RAHMAN ZOHARI BIN TUN DATUK ABANG HAJI OPENG

Premier of Sarawak

Sarawak is strategically positioned to capitalise on the booming semiconductor industry, a sector energised by generative AI and data centre expansions that reached USD 627 billion in global sales last year. Guided by the Sarawak Semiconductor Roadmap 2030 – Beyond Moore's Law, spearheaded by SMD Semiconductor, our 2030 ambition is to become a pivotal node in the global semiconductor supply chain. This blueprint is designed to accelerate innovation, build advanced local capabilities, and establish Sarawak as premier hub for high-value, capital-intensive investments that generate sustainable, long term economic growth.

The recent memorandum and strategic partnerships reflect strong investor confidence and the tangible potential for major inflows that will anchor the advanced compound semiconductor industry.

Sarawak is positioning itself as a regional gateway for semiconductors, capitalising on Asia's fast-growing demand in electric vehicles, artificial intelligence, cloud computing, renewable energy, and consumer electronics. This roadmap gives investors clarity, certainty, and assurance that Sarawak is building, the infrastructure, policies, and talent needed to thrive in the global economy.

We invite the world's most forward-looking companies to join Sarawak's industrial rise, an opportunity anchored by our government's stability and long-term strategic vision. Investors here will become part of a collaborative ecosystem where predictable policy environment helps fosters innovation, inclusivity, and sustainability – the core values of our investment philosophy.

Sincerely,

DATUK AMAR HAJI AWANG TENGAH BIN ALI HASAN

Deputy Premier of Sarawak

Technology succeeds where talent thrives. The Sarawak Semiconductor Roadmap 2030 - Beyond Moore's Law places people at the centre: from early STEM exposure and vocational pathways to advanced programmes in chip design, research and industry-embedded training organised in partnership with the Ministry of Education, Innovation and Talent Development (MEITD), universities, and industry players. We have empowered students in Sarawak, particularly local secondary schools, and universities to apply circuit design principles, turning abstract ideas into tangible prototypes.

This talent pipeline aligns with the broader Post-COVID Development Strategy 2030 (PCDS 2030) goal of building a workforce capable of driving high-tech sectors forward by embedding upskilling, hands-on learning, and clear career pathways, and planting the seeds of long-term resilience for Sarawak's next generation.

Sincerely,

DATO SRI ROLAND SAGAH WEE INN

Minister for Education, Innovation and Talent Development Sarawak

Witnessing the Sarawak Semiconductor Roadmap 2030 - Beyond Moore's Law's evolution from concept to actionable plan has been immensely rewarding. Its blend of ambitious projects and targets is rooted in Sarawak's strengths, with an integrated approach spanning IC design, critical infrastructure, talent and frontier technologies. SMD has achieved significant milestones in a short time, and this document demonstrate that our approach is practical, collaborative and impact driven. I am confident the roadmap will not only attract investment and talent but will also catalyse a sustainable semiconductor ecosystem that will benefits all Sarawakians.

The Sarawak Semiconductor Roadmap builds on the foundation of SMD's "Beyond Moore's Law" Roadmap and is aligned with key State blueprints, including the Post-COVID-19 Development Strategy (PCDS) 2030, the Energy Transition Roadmap, the Sustainability Blueprint, the Gas Roadmap, and the Digital Economy Blueprint. This alignment ensures coherence across policies, while positioning semiconductors as one of the key pillars of Sarawak's industrial transformation.

This blueprint is also a testament to strong teamwork — the dedication of agencies, academia, industry, and communities united by a common vision for Sarawak. The Syndication Session in July 2025 which brought together 50 leading stakeholders, produced 14 integrated strategies spanning R&D, AI integration, IP commercialisation, sustainability practices, and investment activation.

Together, we are building not only an industry but a legacy of innovation and resilience that will position Sarawak on the world map for decades to come.

Sincerely,

DATO SRI DR. HAJI WAN LIZOZMAN BIN HAJI WAN OMAR

Chairman of SMD Semiconductor

When SMD was established, our mission was clear: to translate ambition into capability. The Sarawak Semiconductor Roadmap 2030 - Beyond Moore's Law is the product of that resolve — a focused set of strategies and projects that capture lessons learned, early wins and practical steps ahead. In recent engagements, we have presented its strategic direction and secured partnerships that prove our ecosystem is responsive and investible.

We have already begun nurturing local talent, prototyping IP, and forging international collaborations — and we will not slow down. This roadmap is our commitment: align everything to our Beyond Moore's Law philosophy so that Sarawak can compete at the frontiers.

The journey ahead will be more challenging, but our rapid achievements in such a short period prove that Sarawak can deliver. We are not merely following global trends — we are shaping them. With the continued support from the Premier of Sarawak, the State Government and Federal Government, our industry partners, SMD will ensure that Sarawak becomes a vital node in the global semiconductor value chain.

Sincerely,

MR. SHARIMAN JAMIL

CEO of SMD Semiconductor

The Sarawak Semiconductor Roadmap is anchored on 3 key guiding principles

Leverage on Sarawak's Strength

Focus on Renewable Energy
Leverage Sarawak's leadership in renewable energy to drive next-generation semiconductor innovation, in developing energy-efficient chips, power electronics, and semiconductor solutions to support the global transition towards green and hydrogen economies.

Established Industrial Base
Existing high-tech clusters such as Sama Jaya Free Industrial Zone, provide a foundation for scaling semiconductor manufacturing and R&D.

Strategic Geographical Location
Sarawak's neutral location between the US and China and its closeness to major Asian semiconductor hubs make it an ideal regional gateway.

Supportive Policy Environment
Backed by state and federal incentives & pro-industry policies such as the National Semiconductor Strategy, Sarawak's growth is further reinforced through alignment with Post-Covid Development Strategy (PCDS) 2030, Sarawak Energy Transition Roadmap (SET-P), Sarawak Gas Roadmap, and Sarawak Digital Economy Blueprint.

Collaboration Between Industry and Academia

Joint Research & Innovation
Co-investment in R&D for next-generation semiconductors, such as energy-efficient chips, advanced materials, and power electronics for renewable and hydrogen applications.

Technology Transfer & Commercialisation
Creating pathways for academic research to be commercialised through incubation hubs, patent licensing, and start-up acceleration.

Talent Development
Collaborating with industry practitioners to enrich university curricula, create placement opportunities, and develop apprenticeship pathways for future talent.

- Upskilling & Re-skilling

Develop and promote skills training e.g. Semiconductor Mastery Programme.

- Integrated Education Pipeline

Embed semiconductor-related modules into school STEM programmes and expand university-level courses in chip design and advanced manufacturing.

- Talent Innovation Platforms

Hub for universities, research centres, and industry to support training, certification, and skills development.

Backed by Market Demand

Commercial Viability
The identified semiconductor products (e.g. compound semiconductors, advanced packaging, power electronics, energy-efficient chips, or specialty materials) must be validated by real and growing demand from regional markets. This ensures that Sarawak's investments are commercially viable, globally relevant, and aligned to long-term growth opportunities in Asia.

- Market Potential

Asia is currently the largest global consumer and producer of semiconductors such as automotive chips (EVs, ADAS), AI and cloud computing semiconductors, power semiconductors for renewable energy and hydrogen, and consumer electronics.

- Market Access

By aligning with Asia's demand and integrating with regional trade flows, Sarawak can strengthen its domestic supply chain resilience while expanding access to global markets.

SWOT analysis for Sarawak Semiconductor sector shows high potential for growth in strengths and opportunities, whilst identifying risks to be managed, in weaknesses and threats

INTERNAL

- Strong anchor players in wafer fabrication and wafer testing
- Well-established industrial parks for semiconductor (Sama Jaya, Samalaju)
- Strong state government support in driving the growth of the semiconductor sector, led by the Premier of Sarawak
- Establishment of SMD to spearhead Sarawak into higher value segments, and catalyse growth in the ecosystem
- Presence of local universities and training institutions to prepare pipeline of talent

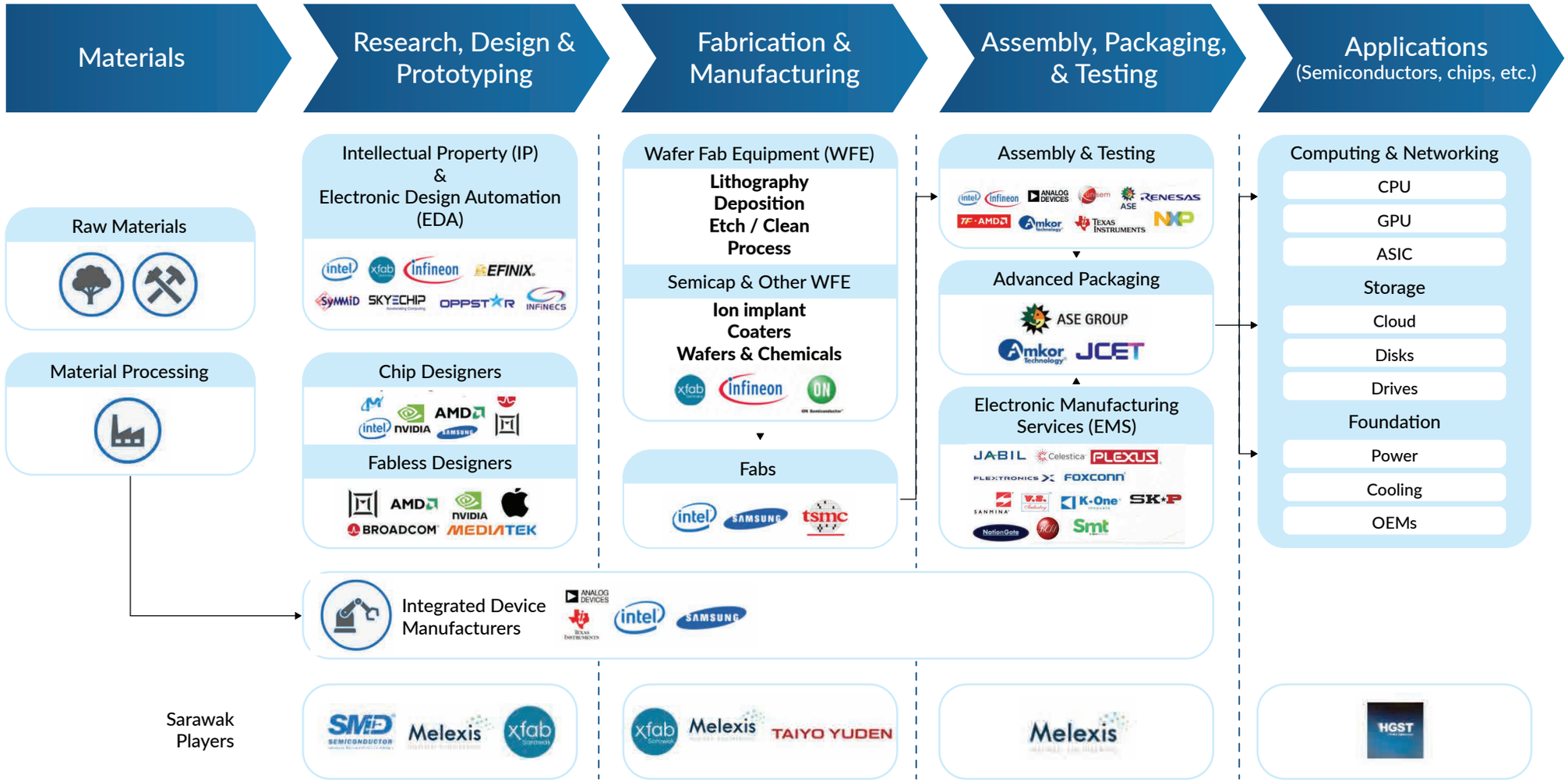
EXTERNAL

- US-China trade war are steering semiconductor companies to find alternative sites for chip production
- Global market shift towards RE, EV, IoT and IR4.0 are exponentially driving demands for chips
- New innovation in advanced materials such as compound semiconductors are opening up new opportunities
- The race to produce AI chips pose opportunity for Sarawak to quickly capitalize on this opportunity
- Electricity generation to follow global standard (grid SEMI F47)

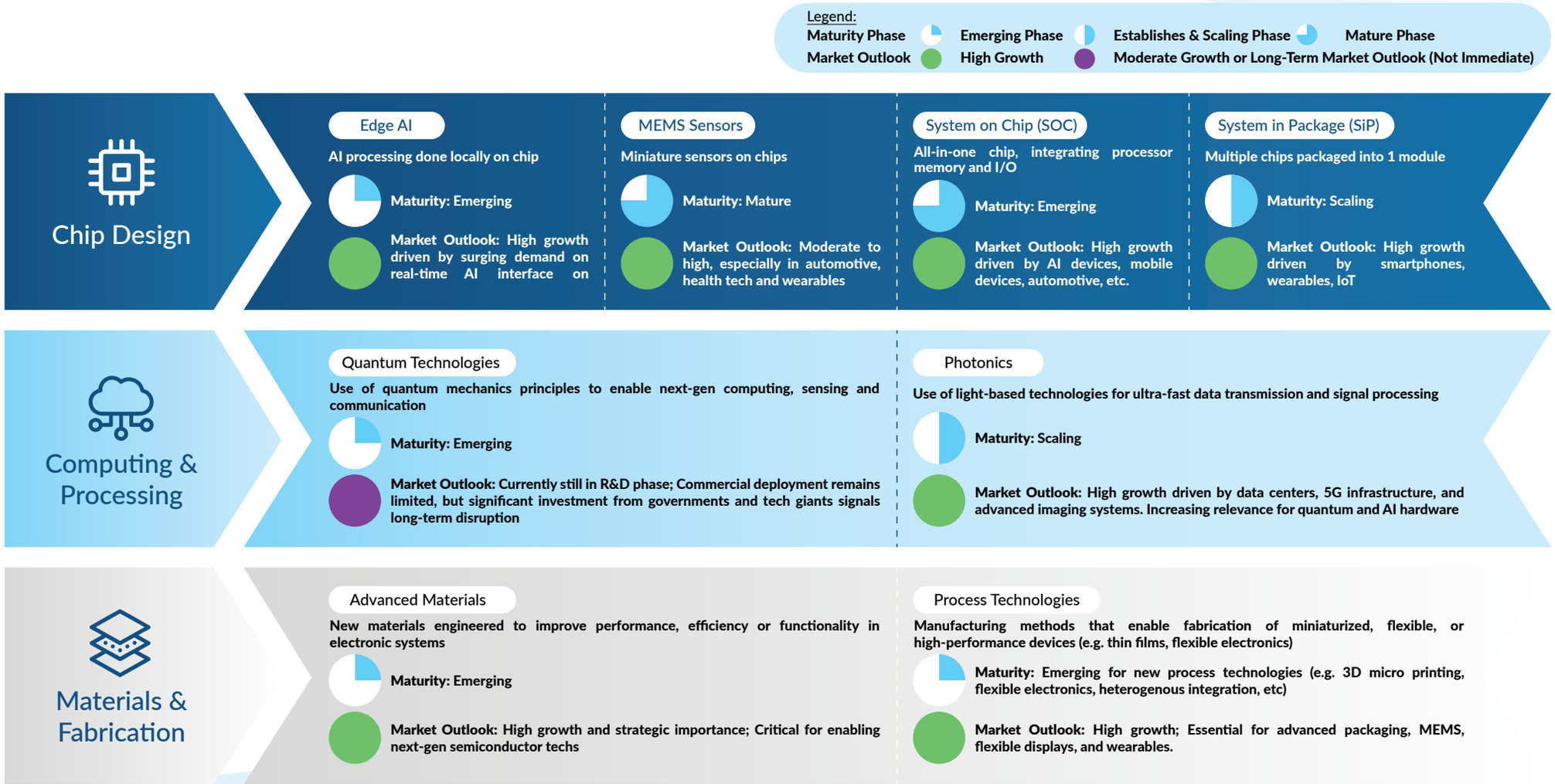
- Limited industry players, compared to more mature semiconductor hubs
- Talent shortage for high-skilled jobs such as IC design
- Small domestic market, hence heavy reliance on export market

- Competition for investors from existing semiconductor hub in Malaysia & Southeast Asia
- Uncertainty in US tariff imposed to Malaysia, impacting semiconductor exports to US

Currently, Sarawak's key strength is in the design and fabrication segments of the E&E value chain through collaborations with global semiconductor manufacturers



Market outlook shows tremendous opportunities to establish Sarawak's market leadership in emerging innovation and technologies



SMD Semiconductor was launched in 2022 to catalyse and spearhead the growth of the semiconductor industry in Sarawak

2022

- MoU between Melexis and MEITD on collaboration for IC design and talent development
- SMD launching by Premier of Sarawak
- FSA Signing with Melexis for IC Design services

2023

- Commencement of 1st IC Design project with Melexis in Sofia, Bulgaria and Grasse, France
- FSA Signing with X- FAB for IC Design services
- Talent Development in Semiconductor and Chip Design Programme with CENTEXS, Sarawak Skill, Melexis, X-FAB, Synopsys
- Launch of Train-The-Trainer (IC Design) Programme

2024

- MoU with Compound Semiconductor Applications (CSA) Catapult in UK Parliament and MoU with Silicon Catalyst, Siemens EDA, Cambridge Microelectronics, Hives AI & weeteq during IDECS 2024
- Launched SMD Chip Design Centre
- Launched SMD Academy
- Launched Semiconductor Mastery Programme (IC Design & IC Test Solution)
- Hosted the first IC Design Make-A-Thon

2025

- Established SMD R&D Innovation Hub in Wales, UK
- Demo AI-enabled Ultra Edge Power Converter at MWC 2025, Barcelona
- Launched keteq.ai at CSA Catapult, Wales, UK
- Launched the first IC Design Competition
- Hosted 2nd IC Design Make-A-Thon
- Upcoming announcement of compound semiconductor prototype at Microelectronics UK, London

In July 2025, SMD in collaboration with MINTRED and MEITD hosted an engagement session with key stakeholders to syndicate and obtain further input to establish the first Sarawak Semiconductor Roadmap

Approximately 50 participants from nearly 30 organisations participated in the engagement session...

The syndication session covered range of discussion on strategies and initiatives such as Industry Value Chain, Talent, Innovation, R&D, Technology, and Enablers for the Sarawak Semiconductor Roadmap

01

Industry Value Chain Focus Area: 4 Strategies and 11 potential initiatives

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Focus Area: Industry Value Chain

Strategies	Preliminary Initiative	PIC
A1 **Strengthen Sarawak IC design capabilities via partnerships with global semiconductor players**	A1.1 Secure and grow long term commercial partnership with anchor clients **(global semiconductor players such as Melexis and XFAB)** – starting with contract design and subsequently into other product development)	• SMD
	A1.2 Establish partnership with other support partners for assembly and test, incubation and commercialisation **such as Camtronics and Silicon Catalysts**	• SMD
A2 **Develop product roadmap / validation/ system module beyond**	A2.1 Develop microcontrollers & embedded system (RISC-V)	• SMD
	A2.2 Develop ultra edge power converter (KETEQ.ai)	• SMD

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02

Talent Ecosystem Focus Area: 3 Strategies and 10 potential initiatives

Focus Area: Talent Ecosystem

Strategies	Preliminary Initiative	PIC
B1 **Ensure continuous supply of local semiconductor talent via training programmes and STEM outreach**	B1.1 Trigger interest in STEM education starting from primary education	• MEITD • MOE • MOHE
	B1.2 Promote STEM education and programs in secondary education	
	B1.3 Strengthen Industry-led STEM programs in tertiary education	
B2 **Continuous upskill / re-skill talent**	B2.1 Introduce vocational skills training for out-of-school talent	• MOE • MEITD • SMD • CENTEXS
	B2.2 Establish semiconductor industry workforce knowledge sharing	

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03

Innovation/ R&D / Technology Leadership Focus Area: 3 Strategies and 7 potential initiatives

Focus Area: Innovation/ R&D / Technology Leadership

Strategies	Preliminary Initiative	PIC
C1 **Catalyse and facilitate development of new products and applications (IPs) via Partnership, R&D centre, innovation hub etc**	C1.1 Creation of new IPs for commercialisation via development, licensing and acquisition	• SMD
	C1.2 Develop and commercialise product/ technology via development and/or partnership with global semiconductor players with established IPs and market access	• SMD
	C1.3 Develop Semiconductor Design and AI Chips Integration Centre	• SMD
	C1.4 Develop clean-room as a service via public/private partnership	• TBD

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04

Enablers: 3 Strategies and 6 potential initiatives

Focus Area: Enablers

Strategies	Preliminary Initiative	PIC
E1 **Policy / Funding: Government support for semiconductor sector development**	E1.1 Access to government financing (e.g., leverage on existing funds for high tech industries)	• SFS • SDEC • SMD
	E1.2 Access to non-government financing	• Funds - EPU, BNM, DBOS, Khazanah, British High Comm, Affin
	E1.3 Customise non-tax incentives for localisation? [Further discussion EPU]	• Immigration
	E1.4 Labour restriction - exemption for selected promoted sectors such as semiconductor ? [Further discussion with ILMU]	
F1 **Governance: Strategic oversight of semiconductor sector development by key government stakeholders and industry experts**	B2.1 Establish Sarawak Semiconductor Council	• SMD • MEITD • MINTRED • EPU • Invest Sarawak
G1 **Other Infrastructure: Establish Sarawak Silicon Longhouse™ 's support infrastructure and connectivity**	B3.1 Establish enabling infrastructure for Sarawak Longhouse™ (power requirement 5-7 megawatt by 2027/28, land price, site readiness, connectivity)	• SMD • MEITD • MINTRED • EPU

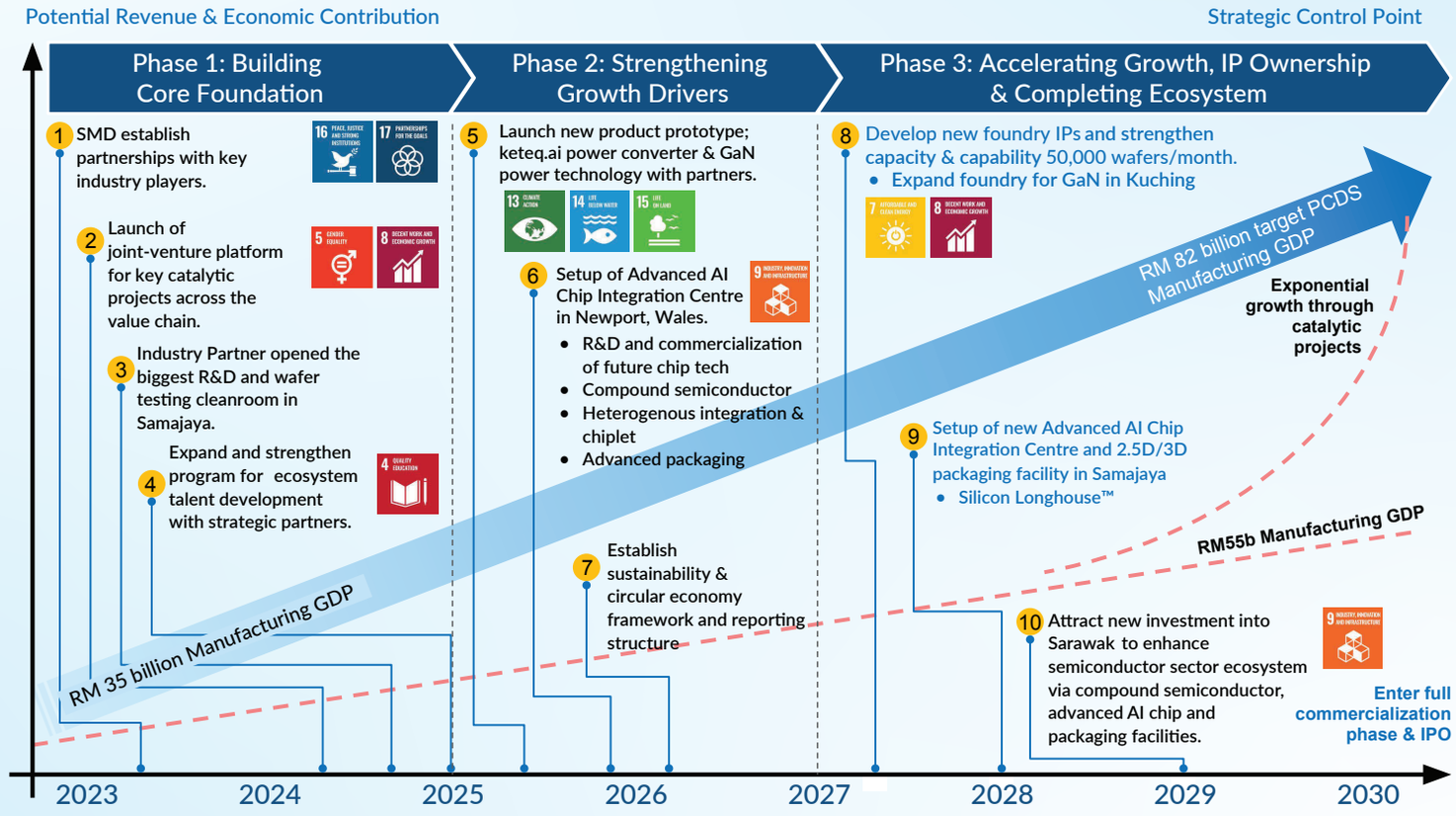
10

SMD's 'Beyond Moore's Law' Roadmap serves as the foundation for Sarawak Semiconductor Roadmap 2030

By 2030, Sarawak will complete the semiconductor eco-system roadmap through talent development effort via 10 strategic steps

PCDS 2030
Sector: Manufacturing
Target GDP: RM82b
Enabler: Education Human Capital & Innovation

- >RM2 BIL Fund Raised
- >RM30 BIL GDP Contribution
- >10 Partnerships with Top Players
- >3,000 New High Skilled Jobs
- >100 New IPs
- >3,000 Graduates Supported & Trained
- >10,000 Students Engaged for STEM
- >1 Million Digital Reach



Outcome 3 Semiconductor Sector Key Targets have been identified, in line with PCDS 2030 targets

Top Line KPI	PCDS 2030 Target	Semiconductor 2030 Target
Gross Domestic Product (GDP)	Doubling the economy from RM136 billion to RM282 billion (~6–8% annual growth) Manufacturing from RM35 billion to RM 82 billion	~RM30 billion
Job Creation	Create 195,000 new jobs in Manufacturing 3,000 new high skilled jobs	Create 3,000 new high skilled jobs
Investment	Attract RM21.5 billion in Manufacturing investments	Attract RM2 billion in investments

Outcome Sarawak's Semiconductor Framework will be anchored on 14 key strategies as well as ~34 projects & initiatives

Aspiration

Sarawak Semiconductor Sector Roadmap 2030
(Transform Sarawak into the Silicon Nerve Centre of Asia)
Potential Impact: Accelerate growth of Semiconductor sector's contribution to State GDP, Investment and Jobs

Focus Areas

01 Industry Value Chain	02 Talent Ecosystem	03 Innovation/ R&D / Technology Leadership	04 Sustainability

Strategies

01 Industry Value Chain	02 Talent Ecosystem	03 Innovation/ R&D / Technology Leadership	04 Sustainability
• Develop and strengthen local IC design capabilities via partnerships with global Semiconductor players • Develop validation/ system module (post design) • Establish critical assets and infrastructure across the value chain segment to catalyse the semiconductor ecosystem • Explore future global market for	• Ensure continuous supply of local semiconductor talent via training programmes and STEM outreach • Continuous upskill / re-skill talent pool following evolving industry needs • Establish industry-academia collaboration platform to ensure talent supply-demand balance	• Catalyse and facilitate development of new products and applications (IPs) via Partnership & R&D centre, • Adopt and Integrate AI into product development and business operation • Catalyse R&D activities in Sarawak via incubator strategy and strategic Sarawak investment	• Increase adoption of sustainability practices and reporting amongst semiconductor players

Enablers

05 Policy/ Funding/ Incentives	• Strengthen Government support for semiconductor sector development
06 Governance	• Establish Strategic oversight of semiconductor sector by industry experts and key government
07 Other Supporting Infra	• Establish Sarawak Silicon Longhouse™'s support infrastructure and connectivity

Industry Value Chain

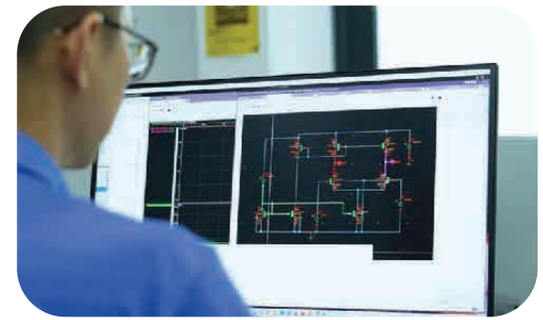
Flagship Initiative A1.1:

INITIATIVE A1.1: DESIGN SERVICES - SECURE AND GROW LONG TERM COMMERCIAL PARTNERSHIP WITH ANCHOR CLIENTS

Business Unit	IC Design Engineering	Timeline	2024-2030

Project Concept & Details

- **This initiative involves building SMD capabilities to provide IC design services to clients via an outsourcing model:**
  a. **The Framework Service Agreement with client will serve as a 'base contract', followed by the Statement of Work issued by client to determine the design services required**
  b. **In this model, the IP belongs to the client**
- **Technical resources required include front end, back end as well as software & testing engineers**



Typical project flow for IC design services

Secure agreement with anchor client (FSA and SOW) → Project & resource planning → Infra setup (hardware and software) → Project delivery (monthly billing to client)

Industry Value Chain & Innovation

Flagship Initiative A2.1-3:

DEVELOP ADVANCED MICROCONTROLLER & EMBEDDED SYSTEM, keteq.ai & COMPOUND SEMICONDUCTOR AND ELECTRONIC EMBEDDED SYSTEM (ETES)

Business Unit	Product Development & Compound	Timeline	2024-2030

keteq.ai & compound semiconductor

- keteq.ai & compound semiconductor is being developed by SMD in collaboration with the UK's CSA Catapult & 5G3i, currently in the commercial readiness development phase.
- keteq.ai offers real-time fault correction in power systems, enhancing machine intelligence, speed, and stability through embedded AI
- Compound semiconductor is a GaN power module, which can be heterogeneously integrated with keteq.ai for the usage of energy grid, renewable energy, data centers

Advanced microcontroller

- Currently co-developing microcontroller for application in automotive sector (via an existing automotive microcontroller IP from Melexis) used for control, data processing and communication in Engine Control Units (ECUs), flight control systems, navigation systems, etc
- Melexis' vast experience in designing compound semiconductor ICs for automotive sector, paves the way into aerospace sector due to the similarity in IC requirements and usage for these sectors

Electronic Embedded System (ETES)

- Sarapeg 2.0 – Smart Land Marker (Global Navigation Satellite System) to integrate GPS and/or sensors microchip into Sarapeg land markers, and develop applications using the land marker data – SDG 15 Life On Land
- Development of a Cloud-based AI-enabled GIS i.e., next-gen e-LASIS

Industry Value Chain

Flagship Initiative A3.2:

INITIATIVE A3.2 : DEVELOP THE SEMICONDUCTOR DESIGN AND ADVANCED AI CHIP INTEGRATION CENTRE

Business Unit	Compound	Timeline	2026-2030

Project Concept & Details

Development of Advanced AI Chip Integration Centre (2026 to initiate)

Development of 3D integration technology & advanced packaging, chiplet technology & compound semiconductors with specialised tools for their unique properties. Stringent controls and advanced testing ensure reliable, next-generation electronics leveraging the power of AI.

AI enabled Package design and Digital twin for Advanced packaging

Leverage artificial intelligence to transform packaging design, process control and system optimisation - enabling Virtual prototyping for smarter, faster, and greener manufacturing process AI for process automation

Advanced packaging and integration for AI Hardware

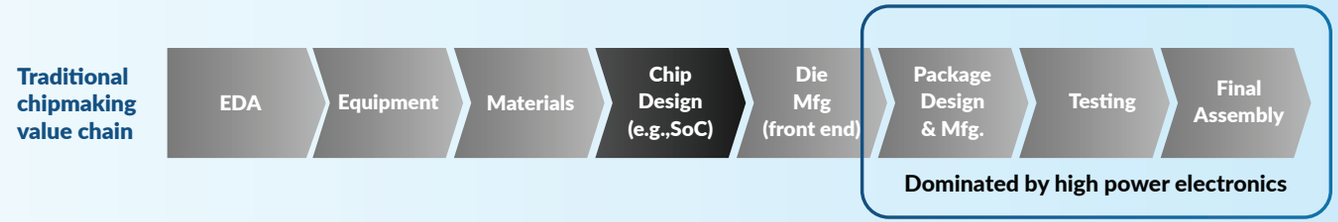
Develop innovative packaging architectures for hyperconvergence of technology in package enabling next gen AI hardware platforms meeting the performance, thermal and high-density interconnect requirements

Source: CSA Catapult

The Semiconductor Design and Advanced AI Chip Integration Centre will redefine packaging as a strategic pillar of chip integration and semiconductor innovation beyond the traditional OSAT model

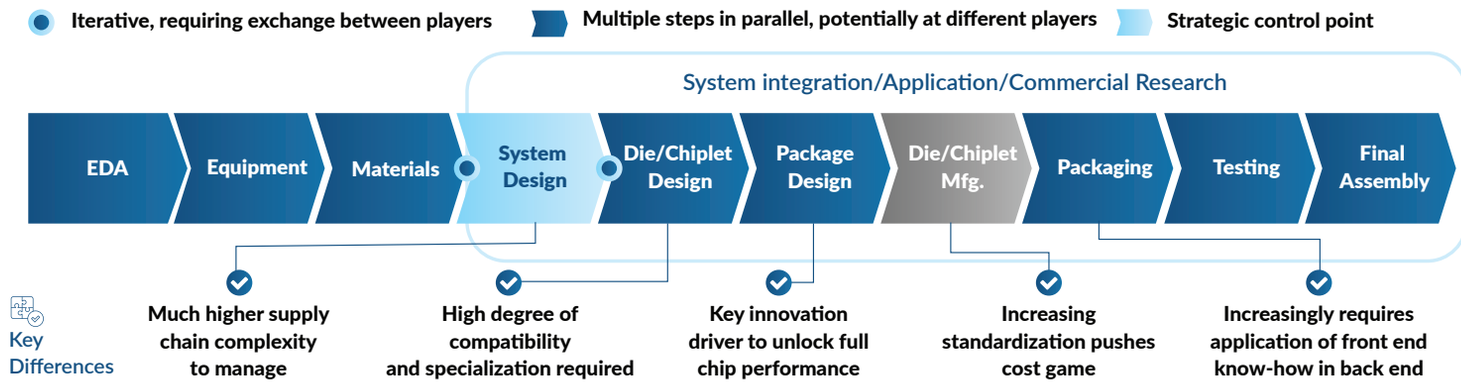
Current - Design Enabled OSAT Model

- **Design-Follows-Fab Approach -**
  Focused on post-fabrication chip package design, assembly, and testing
- Limited Innovation Scope
- Strength in High-Power Electronics Packaging
- Restricted Market Access



Future - System Architects leading the era of chip Integration

- **Application Research -**
  Tailored solutions for domain-specific challenges
- Hyper-Converged Packaging
  – Seamless integration of AI, HPC, PICEIC,and RF technologies
- AI for Packaging and Packaging for AI
- Innovation & Market Access
  – Accelerating commercialisation and global competitiveness



Source: BCG Analysis, CSA Catapult

Noted: EDA (Electronic design automation, SoC (System on chip), Die/chiplet and package system design steps may take simultaneously to reduce time to market

Talent Ecosystem

Flagship Initiative B2.1

INITIATIVE B2.1 INTRODUCE ADVANCED SEMICONDUCTOR MASTERY FOR UNIVERSITIES GRADUATES

Business Unit	SMD Academy	Timeline	2026-2030

Project Concept & Details

- Develop and market skills training e.g. Semiconductor Mastery Programme

Example of Semiconductor Mastery Programme by SMD - Analogue Integrated Circuit (IC) Design and IC Test Solution Development

- The Semiconductor Mastery Programme is a six-month, fully funded training initiative launched by SMD to cultivate highly skilled analog IC design and IC test solution development professionals in Sarawak
- Candidate will receive monthly training allowance of RM 2,500
- Subject coverage (but not limited to); RTL Coding and verification, Synthesis and automatic place and route (APR), PDK and EDA tools, Complete RTL-to GDSII flow and Processor design projects
- Opportunity to work with SMD, Melexis or XFAB post completion of programme

Success Stories

Cohort 1

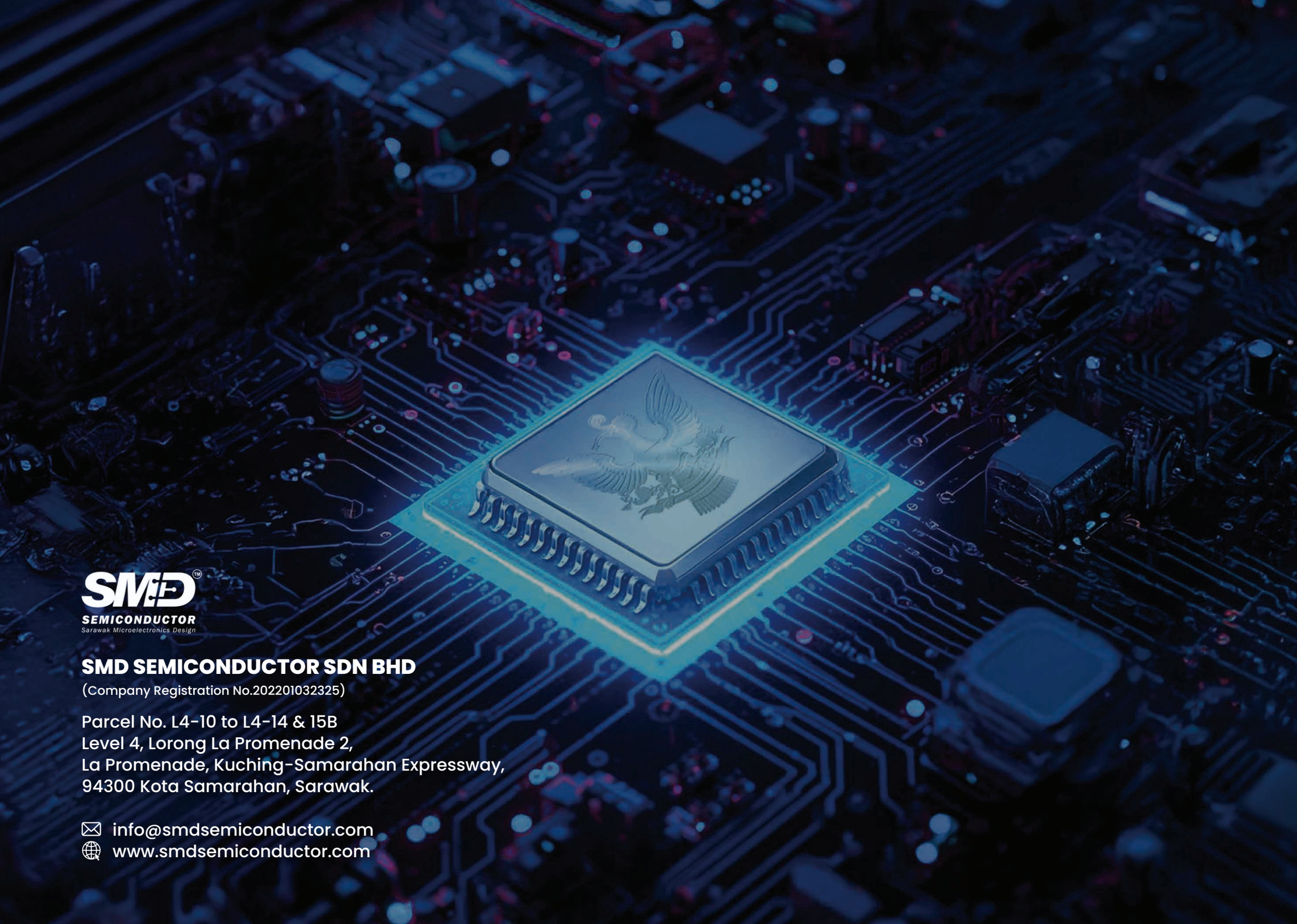
Period: February – September 2024
Specialisations: Analog IC Design & IC Test Solution Development Engineering
# of Graduates: 14 (all employed either by SMD or Melexis post programme)

Cohort 2

Period: October 2024 – March 2025
Specialisations: Advanced training in IC design, layout, and testing
# of Graduates: 18 (all employed either by SMD or Melexis post programme)

Completion ceremony for 2nd Cohort Semiconductor Mastery Programme

Trainees that has completed their Semiconductor Mastery Programme, has been employed by Melexis.



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